County Development Plan Review

Retail

Part B: Town Centre Study – Volume 1

November 2012

Planning Policy Unit
Cork County Council

Retail in Non-Metropolitan Towns and Town Centres – Section 11 Background Paper

These background papers set out some of the factual, contextual information and sets out some of the issues in relation to both town centres and retailing which have been used to inform the Section 11 Consultation Document and forms part of the process of preparing the forthcoming Draft County Development Plan.

The background papers are composed primarily of 2 parts:

Part A – Non-Metropolitan Retail Background Paper – This document is primarily composed of an assessment of the key facts and figures (where available) and some suggestions in relation to the approach to retail in non-metropolitan Cork. The Metropolitan area (Cork City, Suburbs and Metropolitan Towns) has been excluded at this stage and is the subject of the Cork Joint Retail Study currently being prepared by the Consultants John Spain and Associates as is a requirement of the Retail Planning Guidelines (2012). This will inform the preparation of the Draft County Development Plan in due course.

Part B – Town Centre Review (Volumes 1 & 2) - This is the full review and report on 12 Town Centres in the County prepared which was presented to Planning Policy Group in May 2012. It remains in Draft format. The towns studied were chosen generally based on their size of population (> 5000) and their representative geographical spread. The individual surveys looked in detail at two key Town Centre Health Check Indicators (also known as Vitality and Viability Indicators) i.e. Diversity of use and Vacancy while it also gave some consideration to other issues.

Note: Although November 2012 is the cover date on this document the data used to inform the document was largely collected in late 2011 and throughout 2012 as indicated above.

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1 Context and Methodology:

1.1 Introduction

1.1.1 Town Centres are the hearts of towns and communities. They have been for centuries. Profound changes in recent years mean there has never been a more opportune time to examine them. The phenomenal growth of online retailing, the rise of mobile retailing, the speed and sophistication of the major national and international retailers, the type of experiences offered by today's breed of shopping mall, combined with a major recession have all conspired to change today's retail landscape. New benchmarks have been set against which our town centres are being judged. New expectations are being created in terms of value, service, entertainment and experience against which many town centres are challenged. Our towns need to assess what's happening and attempt to deliver something new.

1.1.2 This sense of a challenge for our town centres is being increasingly documented. In the UK *The Portas Review* has drawn much attention to the issue regarding the future of High Streets. The media are highlighting the plight of town centres in distress. TV programmes such as *Dirty Old Towns* on RTE with Diarmuid Gavin are popularising the issue. The recent publication of the new *Retail Planning Guidelines* by the Department of the Environment reinforces the message that enhancing the vitality and viability of our town centres is essential.

1.2 Survey Methodology

1.2.1 It was agreed in November 2011 that 12 Town Centres would be the subject of individual Town Centre surveys. These towns were chosen generally based on their size of population (> 5000) and their representative geographical spread.

Table 1.1 – Selected Towns and Census Population Total

	2006	2011
Ballincollig	15,760	17,368
Carrigaline	12,835	14,775
Midleton (Town Plan)	10,048	12,001
Cobh (Town Plan)	11,303	12,347
Mallow (Town Plan)	10,241	11,605
Fermoy (Town Plan)	5,873	6,489
Youghal (Town Plan)	6,785	7,794
Bandon	5,822	6,640
Clonakilty (Town Plan)	4,154	4,721
Mitchelstown	3,365	3,677
Bantry	3,309	3,348
Skibbereen (Town Plan)	2,338	2,670

1.2.2 The individual surveys looked in detail at two key Town Centre Health Check Indicators (also known as Vitality and Viability Indicators) i.e. Diversity of use and Vacancy while it also gave some consideration to other issues. The new *Retail Planning Guidelines* encourage the health check approach and recommend that it should both inform and be undertaken within the framework provided by the development plan in order to supplement its key retail policies and objectives.

1.2.3 The report prepared for each individual town survey includes the following:

- Identification and mapping of the town centre retail core

- Full survey of uses and vacancy within this area
- Map and commentary regarding edge/out of centre retail
- Noting of significant town centre opportunity sites
- Review of overall car parking arrangements within town centres
- Notes on the overall physical and environmental condition of streets
- Any other relevant items

1.2.4 The overall report on this survey work is presented in two volumes:

Volume 1 – Overall Comparative Analysis of Town Centre and Recommendations (Current Volume)

Volume 2 – Diversity of Use/Vacancy Survey (individual surveys) for selected towns.

1.2.5 The more detailed results of the individual assessments of the town centres are presented in Volume 2 - Report on Diversity of Use/Vacancy Survey which includes the items outlined above. The Overall Comparative Analysis of Town Centre and Recommendations in Volume 1 (Current Volume):

- Outlines the key issues identified in the survey work particularly in relation to vacancy and diversity of uses.
- Summarises other more general issues arising including issues in relation to the public realm of town centres, access and the physical appearance of buildings and streets.
- Outlines a number of possible actions or areas where further consideration needs to be directed.
- Includes an appendix summarising the noted issues of concern for each town and further detailed information as appropriate.

2 Vacancy:

2.1 Introduction

2.1.1 The *Retail Planning Guidelines* published by the Department of the Environment, Community and Local Government in 2012 note that the proportion of vacant street level property in a town centre is one of a number of key indicators in assessing the Vitality and Viability of Town Centres.

2.1.2 Town centres are constantly evolving and vacant units provide opportunities for retailers to locate in such centres and add to the diversity of retailer representation. Vacant units are not necessarily a sign of stagnation of weakness; they are a function of the economic cycle within all retail centres. They are an indication of the relative health of a centre however.

2.2 Survey Methodology

2.2.1 The Use Survey recorded and mapped uses and vacancies in units within an area which could be considered the identifiable town centre/retail core within each of the 12 town centres. While the area surveyed in many towns is smaller than the area zoned 'Town Centre' in Town Development/Local Area Plans the survey reflects the core commercial area while areas zoned often include brownfield or opportunity sites for the expansion of the town centre.

2.2.2 Retail and Retail Services Vacancy rates can be defined as either the number of units or amount of vacant floorspace not in occupation expressed as a percentage of the total number of units (vacant and occupied) in a centre. The total number of vacant retail units in the town in the categories of General Retail, Retail Service, Leisure Service and Financial & Business Service are combined and measured against the total number of uses evident in these categories to determine the overall level of vacancy. The categories are based on the GOAD Experian Ltd. Categories and classifications as recommended by the Town Centres Retailing and Methodologies paper published by Scottish Government in December 2007. A table showing the GOAD categories used is included in the appendix.

2.2.3 For the purposes of calculating the vacancy rate, a vacant property was defined as any ground floor retail/commercial unit which is available and suitable for use but is unoccupied, i.e. the survey does not include any retail/commercial units which are currently under construction or any units which are derelict.

2.2.4 Best practice guidance recommends that vacancy rates should be where possible expressed as a percentage of total floorspace as well as a percentage of vacant units. This study did not involve the collection of floorspace data however a methodology is being developed which it is hoped will allow for a desktop based broad assessment of the retail floorspace within town centres and assist in the preparation of the Retail Strategy.

2.2.5 An approach which purely takes into account the number of units does not necessarily give a true picture of the vacancy situation as it does not fully reflect the comparative importance of the units to the centre. Nonetheless it portrays a picture of where a town centre sits within a certain space or time.

2.3 Vacancy in Survey Town Centres

2.3.1 The results of overall vacancy in the identified town retail core ranged from 12% to 29% in the surveyed towns and are shown in the following table. Midleton, Carrigaline, Clonakilty and Bantry are the best performing towns in terms of low overall vacancy rates. Population 2006 and Population 2011 are also shown in the same table to indicate where the towns rank in terms of population size.

Table 2.3.1 – Twelve Study Towns Population & Approximate Vacancy Rates

	2006	2011	Vacant
Ballincollig	15,760	17,368	29%
Carrigaline	12,835	14,775	13%
Midleton (Town Plan)	10,048	12,001	12%
Cobh (Town Plan)	11,303	12,347	27%
Mallow (Town Plan)	10,241	11,605	17%
Fermoy (Town Plan)	5,873	6,489	18%
Youghal (Town Plan)	6,785	7,794	25%
Bandon	5,822	6,640	25%
Clonakilty (Town Plan)	4,154	4,721	13%
Mitchelstown	3,365	3,677	17%
Bantry	3,309	3,348	14%
Skibbereen (Town Plan)	2,338	2,670	26%

2.3.2 The following table assesses vacancy in more detail noting the total number of units surveyed, overall vacancy and specifically comparing vacancy on both primary and secondary streets.

Table 2.3.2 – Total Units Surveyed per Settlement, Overall Vacancy and Primary and Secondary Street Vacancy

Town	Units	Overall Vacancy	Vacancy Primary Streets	Vacancy Secondary Streets
Skibbereen	216	26%	7%	28%
Mitchelstown	144	17%	14%	28%
Midleton	218	12%	9%	10%
Fermoy	181	18%	15%	22%
Cobh	117	27%	23%	34%
Clonakilty	217	13%	12%	12%
Carrigaline	126	13%	12%	20%
Bantry	176	14%	8%	15%
Bandon	220	25%	21%	27%
Ballincollig	208	29%	10%	19%
Mallow	291	17%	13%	21%
Youghal	189	25%	21%	27%

2.3.3 Table 2.3.2 previous demonstrates that the Main Streets (or Primary Streets) of Skibbereen, Bantry, Midleton and Ballincollig have the lowest rate of vacancy of those surveyed. The Main Street as defined in the survey area for Skibbereen however is relatively small and compact (only 31 units) and this must be taken into consideration in the assessment particularly when overall vacancy for Skibbereen is approximately 28%. The strength of the Main Streets of Bantry, Midleton, Ballincollig, Clonakilty, Carrigaline is reflected in their overall score. The high rates of vacancy in evidence on the Main Streets of Youghal, Bandon and Cobh are a cause for concern for the future viability of these towns in particular.

2.3.4 Figures, released by Experian, a global information services company in 2010 show that County Cork's overall average retail vacancy rate was estimated to be 17.3%. Ireland's County Average was 14.7%. *Balbriggan Town Centre Health Check* prepared in 2010 estimated that an average pre-recession national vacancy rate would be in the 10-12% region.

2.3.5 According to a 2010 study in Scotland (*Moray Town Centre Health Check Assessment*) the Scottish average vacancy in 2010 was 10%. Of 5 towns studied in the Moray Study, which was considered somewhat comparable based on the size and scale of its towns to those of Cork, the best town centres had a rate of vacancy no lower than 6%. It is suggested therefore that a rate of 10% or lower could be considered to be a very reasonable rate of vacancy given current economic conditions. Even in the most favourable economic circumstances National Prime High Streets often only have a level rarely lower than around 4 or 5%.

2.3.6 In the current context it could therefore be assumed that towns with an overall vacancy in the region of 8-13% can be considered to be performing relatively well. Those towns in the 14-19% category should be closely monitored to ensure there is no further deterioration. Towns with an overall vacancy level over 20% (Bandon, Youghal, Cobh, Skibbereen and Ballincollig) may have reached a critical point where careful consideration needs to be given in relation to any future retail development. Cobh, Bandon and Youghal are particularly precarious in this regard as the vacancy rates on the Main or Primary Streets is also over 20%. The Ballincollig situation may be more temporary with the hope that a recovery in market conditions will provide a solution to the vacancy issue in the newly constructed Old Quarter area in the medium term where a large proportion of the overall vacancy of the town is located.

2.3.7 The relatively high rate of vacancy is a concern in many towns. In a number of towns in particular there are a number of high profile vacant and recently completed units which need to be targeted for occupancy. In towns such as Skibbereen, Youghal and Cobh the relatively high vacancy levels combined with the historically large commercial town centre areas appear to be catering for a demand which has waned over a number of decades and may no longer be fit for purpose. The core town centre areas may need to be reduced. In such towns the high proportion of charity shops and discount stores may additionally be masking an even higher level of vacancy.

2.4 Categorising towns in relation to vacancy

2.4.1 The following is a suggested attempt to categorise towns on the basis of overall vacancy with strong weighting given in particular to high vacancy on primary streets. 3 categories are suggested.

Table 2.4.1 - Proposed Categorisation for Towns regarding Vacancy	
Towns Performing Relatively Well	• Midleton • Clonakilty • Carrigaline
Towns Needing Monitoring	• Bantry • Mallow • Mitchelstown • Fermoy • Ballincollig • Skibbereen
Towns Requiring Possible Urgent Attention	• Youghal • Bandon • Cobh

2.5 Possible Overall approach in relation to vacancy

- Commitment to Monitor all town centres especially the worst cases.
- Develop a Strategy to manage those cases needing attention
- Develop policies for different town centres. In worst cases consider restricting new floorspace, particularly in out-of-centre locations.
- Consolidate core town centre areas
- Prioritise re-occupancy of vacant uses
- Pro-active development initiatives

3 Diversity of Uses in Town Centres

3.1 Introduction

3.1.1 The *Retail Planning Guidelines* published by the Department of the Environment, Community and Local Government in 2012 note that the measure of Diversity of Uses in a town centre is one of a number of key indicators in assessing the Vitality and Viability of Town Centres. It allows the local authority to estimate how much space is in use for different functions and where a consistent approach to the survey work is in place allows them to make an informed estimation as to how that balance has been changing.

3.1.2 The Guidelines note that identifying specifically the footprint of retail uses is very helpful in identifying the core retail areas of a city or town, the primary and secondary shopping streets, and useful in distinguishing between town centre and edge-of-centre areas.

3.1.3 The Retail Planning Guidelines emphasise the major role shopping plays in attracting people to town centres and the importance of such centres retaining retailing as a core function, providing diversity of choice and quality in their shopping and service facilities, and supporting their role as the social and economic focus for their communities and rural hinterlands alike.

3.2 Survey Approach

3.2.1 This survey recorded uses within identified town centre retail cores in various categories to examine the diversity of uses present within the 12 town centres (See Volume 2). Type of uses measured include comparison retail, convenience retail, retail and leisure services, financial and business services, health and medical services, public and religious services and general office use.

3.2.2 Site surveys of each of the survey areas were conducted. Uses were recorded using GOAD Experian Ltd. Categories and classifications as recommended by the Town Centres Retailing and Methodologies paper published by Scottish Government in December 2007. A table showing the GOAD categories used is included in Appendix C.

3.2.3 Individual town centre results in relation to the diversity of uses are included in the individual reports on each of the 12 towns (Volume 2). A broader comparative analysis of the 12 towns is located in this section and also within the attached appendices.

3.3 Quantity of Uses per Town

3.3.1 The quantity of units surveyed per town centre excluding vacant premises is as per table 3.3. Mallow had the highest number of units followed by Midleton and Clonakilty. It demonstrates that the town centres of Midleton, Clonakilty and Mallow are in a somewhat higher order tier in relation to the overall quantity and diversity of uses located within their town centre areas. Carrigaline is a town centre which over time is expanding and increasing its profile while Cobh is possibly in a sustained period of decline/stagnation. Interestingly Skibberreen, Bantry, Clonakilty and Mitchelstown have the highest number of town centre uses per 1,000 population.

Table 3.3 - Quantity of Uses Surveyed per Town Centre

	Total (excluding vacancy)	Uses Per 1,000 population
Mallow	240	21
Midleton	205	17
Clonakilty	192	41
Bandon	176	26
Skibbereen	160	60
Bantry	155	46
Fermoy	149	23
Ballincollig	148	8
Youghal	146	19
Mitchelstown	121	33
Carrigaline	107	7
Cobh	85	7

3.4 Diversity & Representation of Uses

3.4.1 Healthy Urban Centres combine a wide range of other uses – offices, commercial, leisure, hotels, culture, entertainment, education and housing; thus ensuring activity throughout the day and evening, and on different days of the week.

3.4.2 Shopping, although important, is only one of the factors influencing the vitality and viability of urban centres. The most successful places are those that combine shopping with other things to see and do; that are used by different people at different times of day and night. International research increasingly confirms that people are attracted to places for the opportunities they present to combine shopping with a visit to a cafe, hairdresser, restaurant, gymnasium or cinema. In some cases the quality of ancillary attractions are just as important as the shopping offer.

3.4.3 The following tables 3.4.1 and 3.4.2 indicate the overall breakdown in the number and quantity of uses per town as a total number and an overall percentage of total uses. Individual uses are compared in the appendix B of this volume.

Table 3.4.1 - All Towns Diversity of Uses - Totals												
	Ballincollig	**Bantry**	**Skibbereen**	**Mitchelstown**	**Clonakilty**	**Cobh**	**Fermoy**	**Midleton**	**Mallow**	**Carrigaline**	**Bandon**	**Youghal**
Comparison	53	52	54	41	69	23	56	77	94	31	69	46
Convenience	12	10	12	9	14	6	16	18	17	12	17	14
Retail Service	30	22	16	16	21	15	22	29	35	21	23	16
Leisure Service	29	29	36	29	42	26	31	37	43	19	30	35
Other Retail Service	0	0	0	0	0	0	1	0	0	1	0	0
Financial & Business Service	16	20	25	19	23	10	15	25	35	9	16	14
Health & Medical	5	4	6	4	8	0	2	3	6	7	6	8
Public Service	3	17	8	3	12	4	5	4	11	8	6	13
Religious Service	0	1	3	0	3	1	1	0	2	1	2	0
General Office Use	0	0	0	0	0	0	0	0	0	0	0	0
Overall Vacancy (Totals)	60	21	56	23	25	32	32	25	48	17	51	43
Total	208	176	216	144	217	117	181	218	291	126	220	189

Table 3.4.2 - All Towns Diversity of Uses (less vacancy) by percentage

Uses	Ballincollig	Bantry	Skibbereen	Mitchelstown	Clonakilty	Cobh	Fermoy	Midleton	Mallow	Carrigaline	Bandon	Youghal
Comparison	36	34	34	34	36	27	38	38	39	29	39	32
Convenience	8	6	8	7	7	7	11	9	7	11	10	10
Retail Service	20	14	10	13	11	18	15	14	15	20	13	11
Leisure Service	20	19	23	24	22	31	21	18	18	18	17	24
Other Retail Service	0	0	0	0	0	0	1	0	0	1	0	0
Financial & Business Service	11	13	16	16	12	12	10	12	15	8	9	10
Health & Medical	3	3	4	3	4	0	1	3	3	6	5	5
Public Service	2	11	5	2	6	5	3	5	3	6	7	9
Religious Service	0	1	2	0	2	1	1	1	0	2	0	0

This table is a comparison on a % basis of all occupied units in the relevant quantities over the total surveyed i.e. excluding vacant units.

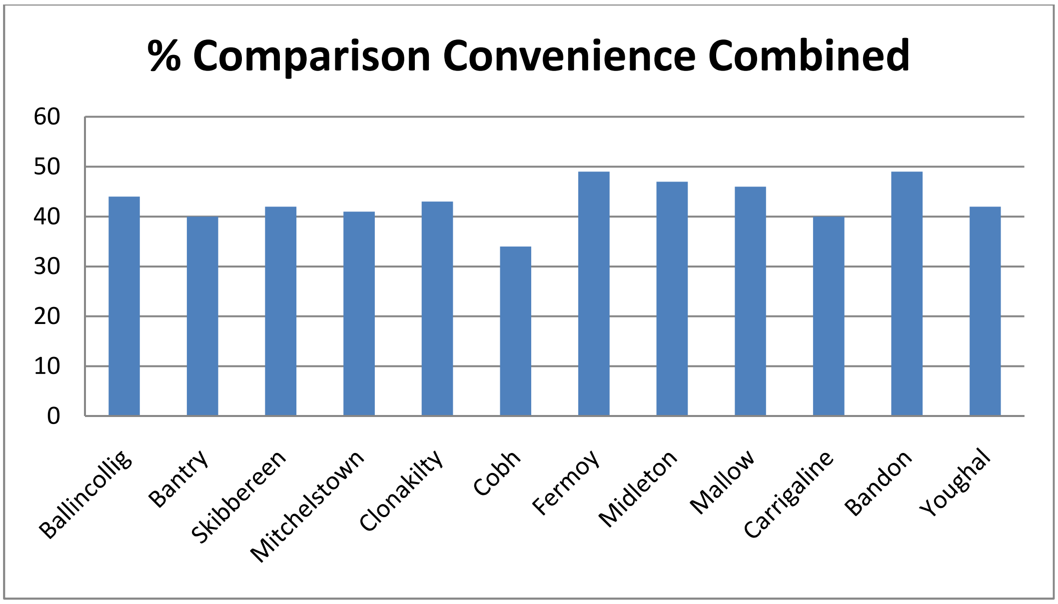
3.5 Retail and Leisure Services

3.5.1 The Retail Planning Guidelines emphasise the major role shopping plays in attracting people to town centres but emphasise that it is only one of the factors influencing the vitality and viability of urban centres. Successful retail destinations must have a critical mass of attractive shops in order to be successful. Lots of shops may not be enough however in determining the success of a retail centre. The quality, consistency and professionalism (Quality Index) of the shops is what determines the overall attractiveness. The following table shows that Mallow, Midleton and Clonakilty are those towns with the highest overall quantity of retail and leisure services and this provides some measure of the relative attractiveness of these towns. Leisure services include bars, cafes, takeaways, restaurants, etc. Retail uses includes all the various retailing elements located in a town centre. The timeframe and scope of the present study did not permit any substantial qualitative analysis in relation to specific uses.

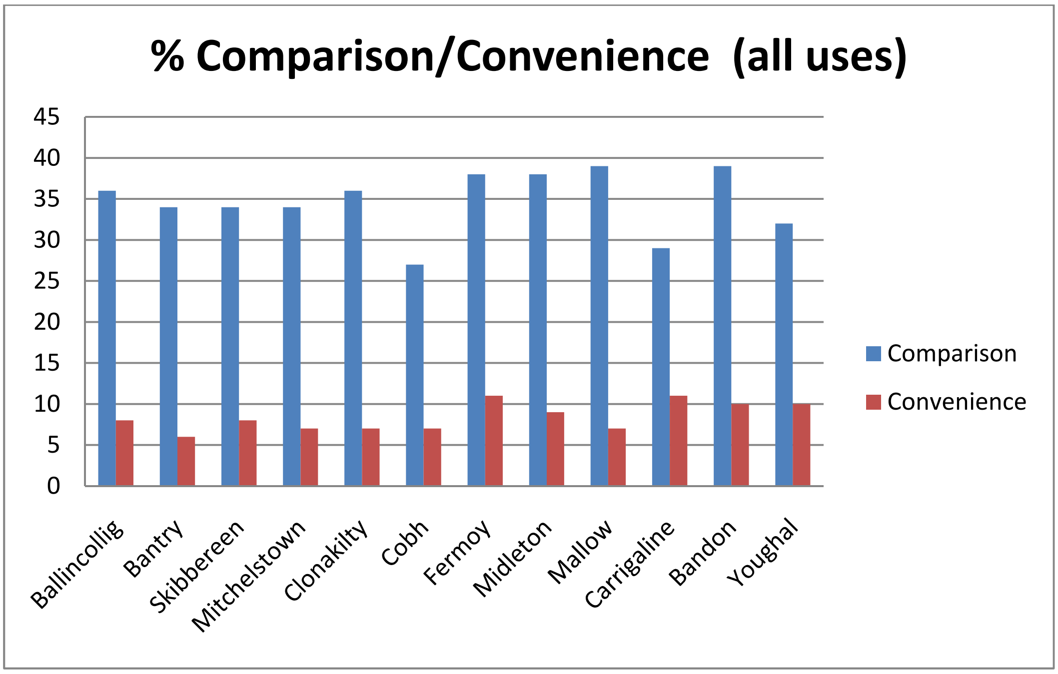
Table 3.6.1 – Total Occupied Retail and Leisure Services per Town Centre	
Mallow	189
Midleton	161
Clonakilty	146
Bandon	139
Fermoy	125
Ballincollig	124
Skibbereen	118
Bantry	113
Youghal	111
Mitchelstown	95
Carrigaline	83
Cobh	70

Total Proportion of Town Survey Areas devoted to retailing:

3.5.2 Convenience Goods in general are described as low order goods - inexpensive things that vary little in price, quality or other features that we need to buy regularly e.g. traditional supermarket good such as newspapers, cigarettes and bread. Comparison Goods in general are described as high-order goods such as antiques, jewellery, and some clothing and electrical equipment. They are called comparison goods because people like to compare prices, quality and other features before buying them. The classification of different categories uses is outlined in Appendix C.



3.5.3 Of the total uses Fermoy (49%), Bandon (49%), Midleton (47%) and Mallow (46%) have the highest level of comparison/convenience retailing combined with almost 50% of uses in these centres involving comparison/convenience retailing. If additional edge of centre retailing is added in Midleton (Market Green Shopping Centre) this figure could be closer to 50%.



3.5.4 The previous graph demonstrates that comparison retailing represents the highest proportion of all uses (percentage of total uses) in the surveyed town centres. This excludes vacant units. In general comparison retail represents approximately 30% of all uses. The towns of Fermoy, Midleton, Mallow, Bandon are particularly strong on comparison goods. Cobh and Carrigaline are weakest in this area with 27% and 29% respectively.

3.5.5 In relation to convenience retailing Fermoy, Carrigaline, Bandon and Youghal have the highest proportion of this type of use. Bantry, Clonakilty, Cobh, Mitchelstown and Mallow have a lesser proportion in the town centre.

3.6 Financial and Business Services

3.6.1 Whilst there are is a reasonable supply of financial and business uses in many of the towns surveyed many of our town centres are primarily focussed on offices which facilitate visiting members of the public as opposed to more general office use. It is acknowledged however that this survey was primarily focused at the street level.

3.6.2 Edge of town centre office developments of the nature of those recently introduced in Ballincollig around the new Old Quarter are an example of the type of approach to office use that can be made in order to increase day and evening footfall in our towns and to increase the overall sustainability of such towns. Locating centrally will enhance the vitality and vibrancy of town centres rather than locating such uses in more peripheral industrial estates or business parks.

3.6.3 Flexible and creative solutions will need to be applied in this regard if such a vision is to be developed. Such a strategy may be particularly appropriate for hub town of Mallow and other larger centres such as Ballincollig.

3.7 Public Services

3.7.1 Towns such as Bantry, Skibbereen, Clonakilty, Mallow and Youghal have quantitatively a higher overall representation of community services including health, medical and other public services than other towns. This may be due to the overall geographical spread and the nature of the hinterlands they serve combined with the overall size of the individual centres.

3.8 Nature of Uses – Independents and Multiples

3.8.1 It is important that towns have a mixture of appropriate retailer types including small independents and local destinations. The higher order towns should strive to have multiple specialists and destination leaders in order to compete with more popular centres. Especially important in town centres are the local destination or small independent stores as these are the outlets which provide a good flavour of a town. Local destination stores such as a gourmet delicatessen or a specialist bridal shop can contribute greatly to the overall vibrancy of a town. A number of such stores are evident in the stronger towns.

3.8.2 The survey sought to measure the number of independents vs. multiples in uses generally. In some cases these multiples may be mere franchisees but the term multiple is selected to distinguish that the range of products may not be independently sourced. It is primarily for comparative purposes for different nature of uses within the retail core than any solid definition of a business as a multiple.

Table 3.9.1 – Percentage of Independent Units per Town Centre (Approximate)

Town	% Indies of Total
Bantry	91%
Skibbereen	91%
Clonakilty	88%
Youghal	87%
Midleton	86%
Fermoy	85%
Cobh	82%
Mitchelstown	78%
Bandon	77%
Mallow	77%
Carrigaline	75%
Ballincollig	62%

3.8.3 The more physically remote towns particularly those to the West are those with the highest number of independents. In general those towns closest to Cork City i.e. Metropolitan Towns such as Ballincollig and Carrigaline have the highest representation of multiples. Mallow, Bandon and Mitchelstown also display their importance as Ring Towns with a high proportion of multiples. The Metropolitan towns of Midleton and Cobh perform somewhat poorly in comparison to other towns in relation to the presence of multiples. If the Market Green development at the edge of the town centre in Midleton were included then the overall percentage of independent units would be reduced. Of the Metropolitan towns, Cobh therefore would have the lowest representation of multiples and a higher level of independents than the other Metropolitan towns surveyed (even if retail developments at Ticknock are included).

4 Location of Retailing:

4.1 Locating Retail within Town Centres

4.1.1 Shopping and services form the backbone of many of our historic town centres, underpinning their role as the focus of the social and business life of their communities. The Retail Planning Guideline's (RPG's) note there will be options for re-use and regeneration to meet the needs of modern retail formats within the existing urban fabric. Certain locations will not be suitable for large scale development whether in terms of size, parking, traffic and servicing requirements. In these locations development should be of an appropriate size and scale, and of a design that minimises any potential for adverse impacts on the character, quality and sense of place of those locations. Creative design solutions and flexibility are necessary in such locations. Commission of Architecture and the Built Environment (CABE) concluded that supermarket development over the last few decades has not been well enough designed, particularly with the repetition of standard 'big box' solutions that bear little relationship to their site and setting.

4.1.2 Site Assembly within or at the edge of the town centre assisted by the local authority can provide positive opportunities for larger multiples to enter towns within more modern format stores.

4.1.3 Challenges to planning and development proposals need to be overcome in the more historic heritage towns. The challenge for such towns is that they continue to maintain the attributes which contribute to their attractiveness while also realising their potential. E.g. Cobh, Youghal have seen commercial retail develop towards the periphery of towns due to their sensitive heritage. Local authorities need to be proactive in unlocking the potential of town centre locations for development. This message is strongly supported in the new Retail Planning Guidelines.

4.2 Out-of-Centre Retailing

4.2.1 In many of the towns surveyed there was evidence of some level of retail activities occurring in out-of-centre locations often within enterprise, business parks and industrial estates.

4.2.2 Such an expansion of retailing and retail warehousing to more peripheral and out of centre locations has the potential to threaten the vibrancy and vitality of the town centre and needs to be carefully monitored particularly in the context of higher levels of vacancies within town or edge of town centre locations.

4.2.3 The new guidelines under Section 3.8 states that:

Planning authorities are recommended to carefully consider the zoning of land for any additional retail warehousing development in their areas, given the level of provision of this category of development in recent years in and around the main centres of population, the levels of vacancy in such centres and thus pressure to entertain uses inappropriate to the edge-of-centre or out-of-centre locations of many of these developments.

5 The Public Realm:

5.1.1 Public realm is defined as any publicly owned streets, pathways, right of ways, parks, publicly accessible open spaces and any public and civic building and facilities. The quality of our public realm is vital if we are to be successful in creating environments that people want to live and work in. The character and quality of urban areas is defined not only by architecture of their buildings, but also by the quality of the streets, squares, parks and other open spaces that comprise the public realm.

5.1.2 The survey also sought to assess the overall quality of the public realm, car parking arrangements and other broader issues derived in some cases from Town Centre Health Check indicators. The following sections deal with Public Realm issues.

6 Access – Parking:

6.1 Parking

6.1.1 Safe and convenient access for all modes of travel is essential to the success of cities and towns. Those that are easy to get to and to move around are generally more competitive and more sustainable.

6.1.2 Parking has a major impact on how places function and how they look and can generally have a negative impact on the public realm of urban places; the challenge is to strike a balance between providing sufficient car access and parking to underpin their vitality and viability, while ensuring that traffic and parking – particularly surface parking does not result in a car dominant environment.

6.2 Car Parking Survey Work

6.2.1 During the survey work attention was paid to each town examining the type and appropriateness of car parking both on street and within grouped car parking areas. Grouped Car Parks were assessed in a general sense paying particular attention to the following areas; Ease of access to town centre shopping area, Signage into car park, Overall quality, Overall accessibility by car, Overall accessibility on foot, feeling of security.

6.3 On Street Parking

6.3.1 The study found that in many towns the level of on street parking is contributing to both visual and physical clutter often detracting from the overall environmental quality of streets surveyed. Often this form of parallel parking is provided at the expense of pedestrian flow narrowing footpath widths and consuming potential public space.

6.3.2 Consideration needs to be given to whether it is appropriate to devote such substantial space to on street parking, taxi ranks, etc. Removal of some parking and improvement of the public realm in favour of more pedestrian friendly public space would redress the balance and contribute to improving the overall environmental quality of towns. If combined with better quality, convenient and accessible grouped parking areas it could make towns considerably more attractive.

6.4 Grouped Car Parks

6.4.1 In general there were improvements necessary in relation to many town centre car parks, in particular directional signage and the overall quality of parking areas. Whilst there were some good examples of car parks in many towns that are well supervised, convenient and appropriately laid out many had the appearance of being of a temporary more transient nature and needed overall improvement.

6.4.2 Better connectivity and accessibility between car parking areas and the Primary Streets also needs to be developed.

6.5 Car parking charges

6.5.1 Car parking charges were noted for each town. A number of towns had free car parking both on street and within public car parks. It is interesting to note that the towns performing best in terms of low vacancy i.e. Midleton, Clonakilty and Carrigaline have no charge for on street parking (with time restrictions) while some of those towns with a higher level of vacancy i.e. Cobh, Youghal and Bandon have on street parking charges (although have some free periods). It is doubtful whether this is the reason for the high level of vacancy nonetheless it raises an interesting issue in relation to how car parking charges are dealt with in different towns.

Table 6.5.1 - Town Centre – On Street Parking				
	Free	**Paid**	**Limit**	**Cost (p.h)**
Ballincollig	Yes		1hr	
Bantry	Yes		2hr	
Skibbereen	Yes		2hr	
Mitchelstown	Yes		2hr	
Clonakilty	Yes		2hr	
Cobh	Yes (1 hr)	Yes	1hr	€1
Fermoy		Yes	1hr	70c
Midleton	Yes		2hr	
Mallow		Yes	?	80c
Carrigaline	Yes		?	
Bandon	Yes (30min)	Yes	3hr	75c
Youghal	Yes (1-2pm)	Yes	?	€1

Table 6.5.2 - Town Centre – Public Car Parking				
	Free	**Paid**	**Limit**	**Cost (p.h)**
Ballincollig	Yes		3hr	
Bantry	Yes			
Skibbereen	Yes			
Mitchelstown	Yes			
Clonakilty	Yes			
Cobh	Yes			
Fermoy		Yes		50c
Midleton	Yes		2/3hr	
Mallow		Yes		70c
Carrigaline	Yes			
Bandon	Yes			
Youghal	Yes			

6.5.2 The recently published *Portas Review* in the UK encourages authorities to consider examining car parking and accessibility including the provision of some free car parking options to encourage shoppers into town centre. This is suggested in order that centres can compete with other centres, particularly out of centre developments which have free car parking. An overall more coherent strategy for car parking and accessibility needs to be given consideration in many towns in order to encourage additional vibrancy and vitality in town centres. Parking enforcement and management could also be improved in some towns as a means to deal with the issue.

6.5.3 It would seem appropriate to attempt to develop a standardised approach to parking for the County and City, to include on-street, public and private car parking. This would provide a fair basis on which different locations including historic town centres can compete and allow for enhanced transparency for the public.

6.6 Cycle parking/Cycle facilities

6.6.1 During the survey it was observed that the provision of facilities for cyclists was poor with very few town centres having appropriate cycle parking, if any. In parallel with public realm improvements to improve the overall pedestrian environment, encouraging more sustainable forms of transport including cycling also needs promotion. The RPG's reinforce that it is Government policy that access to shopping destinations should be as attractive, if not more so, by public transport, cycling and walking, as they are for private cars. Initiatives such as Smarter Travel promoting and developing cycling are currently being piloted in Westport, County Mayo could be developed for our Cork towns. The National Transport Authority (NTA) should be targeted for additional funding in this regard where available.

7 Access and Legibility – Footpaths, Pedestrian Flow and Permeability

7.1.1 Many positive improvements to footpaths (especially resurfacing) have occurred in the surveyed towns in recent years however there are additional opportunities for resurfacing, widening and rebalancing the streets in the town in favour of the pedestrian.

7.1.2 The narrow and sometimes intermittent width of footpaths in many towns is an issue in allowing for adequate pedestrian flow and with regard to the overall quality of the pedestrian environment. Overall pedestrian permeability needs to be enhanced where possible including the addition of further pedestrian crossing points and linkages from Main Streets to car parking areas. Public realm improvements including footpath widening are necessary in order to enhance footfall and permeability, overcome clutter and improve overall public realm and environmental amenity of towns. Providing greater pedestrian permeability increases pedestrian flows and by extension the economic performance of shopping destinations. Permeable and well connected networks of streets and routes are the backbone of successful urban places. As noted earlier in this report the balance needs to be redressed in favour of the pedestrian over car dominated streets.

7.1.3 The RPG's recognise that the key challenge in urban design is to create an urban structure and a movement framework that appropriately balances access and connectivity considerations with the attractiveness of a place's public realm; an overemphasis on vehicular traffic results in congestion and a car-dominated environment, whereas over-restrictive access promotes leakage to out-of-centre development or competing centres nearby.

7.1.4 While the total elimination of vehicular access can disadvantage city and town centres commercially – and fully pedestrian areas can feel empty and sterile – restricted inessential vehicular access, combined with traffic calming, environmental improvements and well sited short term parking, generally enhances both the quality and competitiveness of city and town centres as shopping destinations. Successful outcomes balance 'placemaking' with traffic design.

7.1.5 The recently published Portas Review in the UK emphasises that town centres need to be particularly attractive to families and elderly in order to compete with other similar centres as well as out-of-town centres.

8 Physical Appearance of Buildings and Streets

8.1 Shopfronts and Signage

8.1.1 While typically there are many good examples of modern and traditional shopfronts in our County Towns (Clonakilty being a notable example) there is considerable scope for improvement in many towns. Visual improvement of many buildings and shopfronts is required including painting, refurbishment and provision of appropriate signage.

8.1.2 Well designed frontages, eye-catching displays and generous entrances are essential to ensuring that retail development makes a positive contribution to city and town centres as competitive destinations.

8.2 Physical appearance of Streets

8.2.1 Apart from vacancy and dereliction which are discussed in other sections there are other issues in relation to the overall physical appearance of streets. Visual clutter from first floor protruding signage, overhead street wires, traffic and parking dominance is detrimental to the overall appearance of some streets. Overall unity and visual coherence could be improved in many towns particularly also in relation to the integration of new and old buildings. Enhancing the level of available design guidance and targeting specific problems is considered an important step in addressing this issue.

9 Town Centre Environment:

9.1 Civic/Public Space/Open Space

9.1.1 There appears to be a general lack of reasonably sized civic urban space in many of the towns surveyed. Consideration needs to be given to the provision of additional centralised civic or public space or pedestrian priority areas which would benefit the overall environmental quality of the town and contribute to appropriately enhancing its social and community functions.

9.1.2 While there are weekly centralised farmers markets occurring in many of the towns surveyed other towns have no dedicated location to allow for such a use to occur in the town centre.

9.1.3 A coherent open space network appears to be lacking in many towns which if developed and implemented would improve the overall environmental quality of towns.

9.2 Trees/Street Furniture

9.2.1 The survey noted that the quality and presence of street furniture varied between towns. Some towns had a strong sense of identity and an evident worth in hard landscaping and street furniture details while others were a combination of different types, styles and quality. Some were good while others were in need of improvement. The RPG's note that the design and specification of landscaping elements (planting, lighting, seating, bins, fencing, shelters, poles, lights, bollards and signs) is an integral part of the overall vision for the place.

9.2.2 In general there was a lack of amenity street trees within the towns. Addition of semi-mature trees in town centres could have the advantage of softening the harsher effects of on-street parking and enhance the overall pleasantness. Planting and soft landscaping add to the overall amenity and visual quality. This does not necessarily have to be costly. "Lighter, Quicker, Cheaper" is an innovative way of trialling possible projects and widely used by the Project for Public Spaces (PPS) Group a non-profit planning, design and educational organization dedicated to helping people create and sustain public spaces that build stronger communities. Demonstration Projects can take many forms requiring varying degrees of scale, costs and permanence. Each of these types of projects can help create the foundation for the success of the next:

- Amenities & Public Art – short-term, low-cost interventions to seed places
- Event Based Interventions – recurring, experimental programs to build momentum
- Interim Public Spaces – semi-permanent public space activation plans to establish places before (or instead of) large capital projects.
- Light Development – inexpensive structures and low-overhead retail uses that anchor activity and culturally creative uses.

9.3 Cleanliness

9.3.1 While the survey experience in the majority of town centres was generally positive in terms of cleanliness and maintenance there were some which could be improved. Towns which scored less well in the annual Tidy Towns competition in particular need to aim to improve their overall performance particularly Mallow, Midleton and Mitchelstown.

Table 9.3.1 - Tidy Towns Result 2011 (Ranked)		
	Overall National Score	**Tidy Towns Category**
Clonakilty	306	D
Bantry	297	D
Ballincollig	288	G
Cobh	286	F
Youghal	284	E
Skibbereen	282	C
Bandon	275	E
Carrigaline	274	G
Fermoy	268	D
Midleton	259	E
Mitchelstown	258	D
Mallow	244	E

9.4 Impact of Heavy Traffic

9.4.1 The environmental quality of some towns is being severely impacted by heavy through traffic to the detriment of the overall functioning of the town. Mallow and Bantry in particular are impacted by the transit of HGV's through the town on National Routes while similarly traffic in Fermoy continues to flow through the town avoiding tolls on the M8. In particular narrower streets such as Marino Street in Bantry and Bridge Street in Mallow where footpaths are slender are already suffering the effects with evident vacancy, dust and possible dereliction the end result if the situation is not improved.

9.5 Town Centre Approaches

9.5.1 The overall visual impression of some towns needs to be improved particularly in relation to the approaches into the town centre which in some cases have inappropriate/outdated uses, signage, high profile vacancies. As noted earlier the overall unity and visual coherence of such town centres could be improved.

9.6 Dereliction and Brownfield Sites

9.6.1 In some towns dereliction is becoming a problem. This is often exclusive of whether the town has a high level of vacancy or not but is generally more pronounced in those towns with a higher level of vacancy. Town Centre or Edge of Centre Brownfield and Opportunity sites need to be prioritised for redevelopment and consolidated. Creative use of existing building stock, brownfield sites and strategic land assembly will be necessary for medium to larger developments particularly in towns where there are physical or heritage constraints to unlocking development.

10 Opportunities:

10.1 Opportunities presented by current economic climate

10.1.1 The present economic climate presents opportunities for the more traditional high streets some of which have been identified as the following:

- Re-birth of high street communities
  - Stimulation of new residential
  - Relaxation on mixed use buildings
  - Introduction of community and cultural services
- The return of local retail convenience
- A return of 'civic-pride'
  - Security & repair through everyday use
- Congestion of the retail park
- Increasing expense of retail travel

10.1.2 Local authorities need to recognise that despite the economic downturn and challenges there are in fact opportunities being presented for local town centres to re-establish their role as the primary destination for social, community and economic activity within their geographical areas.

10.2 Making Town Centres Attractive

10.2.1 A reason that many places are successful and have attractive uses, shops, etc is because they deserve them. Research has demonstrated that those town centres which are well managed and which are run like businesses, like department stores, or more appropriately like shopping centres are more successful because they offer the following: (as sourced from VM Unleashed presentation – Dun Laoighre Conference March 2012)

- They make it easy for retailers:

- Vision for retail
- Have a location strategy for retail
- Create a retail destination brand
- Build footfall
- Minimise costs and complications
- Court and attract other new retailers
- Offer profit potential for retailers

- They make it attractive for shoppers:

- Easy access and transport
- Pleasant and safe environment
- Distinct and exciting atmosphere
- Focused retail offer
- Events, markets and fairs
- Cafes, restaurants and entertainment
- Appropriate support services

10.2.2 Town Centre Management Teams need to identify the overall challenges to the success of town centres and the factors that make them successful and to target actions in order to improve the overall environment for the retailers and shoppers.

10.3 Potential for Branding

10.3.1 Branding, Marketing and Vision for individual and collective town centres could benefit these town centres. The principle role of the town and its vision for the future need to be established.

10.3.2 Clonakilty for example appears to have a strong sense of identity and is in itself a recognisable brand already. The challenge for a town such as Mallow on the other hand is to develop a town centre appropriate for a National Spatial Strategy Hub town from its origins as a traditional market town. In Youghal the anecdotal evidence that public and media perceptions have of a town in decline are an issue for the overall image of the town.

10.3.3 Town centres can compete in relation to branding on the emotional attachment of the town which, depending on the town can be based on:

- Uniqueness, heritage and distinction.
- Character, personality and atmosphere
- Stimulating & authentic architecture
- Street environment, lighting and architecture
- 'life' – street entertainment and vitality
- Dynamic events and activities
- Markets and fairs
- Relaxation – cafes, restaurants, bars, pubs
- Interest – galleries, museums, crafts, workshops

10.3.4 Street entertainment and vitality is possibly the most important. Vibrant events programmes, regular workshops and interactive demonstrations and 'fun days'. Balance between the image and the reality in branding however is very important. Brand should not deviate from the actual experience the town offers.

11 Conclusion:

11.1.1 The future of our town centres are threatened. Such threats are recognised in documents such as the recently published *Retail Planning Guidelines* and more generally in the popular media. In order to compete towns need to raise their overall standards, they need to offer similar and more positive experiences to rival other competing centres while at the same time accentuating those characteristics which make them unique and the constant focal point at the heart of their communities for centuries.

11.1.2 This review demonstrates that while there have been positive developments, there is considerable scope for improvement in all our town centres, that they need to evolve further rather than remain static. Our present economic climate presents challenges as well as opportunities for our towns centres on which we must capitalise. It is commonly recognised that those town centres which are most successful are those which are run and managed like businesses. They make it easy for retailers and attractive for shoppers and often have a recognisable and readily identifiable brand which expresses their attractive characteristics.

11.1.3 The level of vacancy in our towns is of concern. For this reason we need to monitor closely the progression of our town centres, treading cautiously in particular when it comes to out-of-centre developments, an increasingly popular phenomenon in most 21st century towns. There may indeed be a need to make town centre locations more financially attractive to those contemplating investment in retail or other similar businesses. A number of our towns have a worryingly high level of vacancy and it is difficult to argue that the vibrancy and vitality which is the essence of an attractive and successful town centre is present in such places. Midleton and Clonakilty appear to display many of the characteristics of attractive town centres in particular with low relative vacancy and a good quantity and mix of attractive retail and leisure services. In towns such as Youghal and Cobh the opposite may be the case.

11.1.4 The quality of the public realm in many of our towns requires improvement. While some progress has been made it can be further enhance. The redevelopment of the town centre in Ballincollig provides a fine example of how the public realm can be designed to enhance the overall footfall and provide quality public space within a modern centrally located shopping environment. Too many of our towns have mediocre car parking arrangements, poorly signed posted and often badly linked to the core. The issue of car parking charges may need further consideration if towns are to compete with out-of-centre locations in particular. Cycle parking is almost non-existent.

11.1.5 The overall pedestrian flow and permeability needs to be enhanced if the desired level of footfall is to be attained and the attractiveness of town centres is to be improved. The quality and appearance of buildings and streets and overall environmental quality need to be improved. There is a need to provide better guidance and support whether with regard to building maintenance, dealing with vacancy or enhancing and improving public open space in our towns generally. One solution could be to provide dedicated assistance in the form of Town Centre Teams as a mechanism to provide assistance to towns on both an individual and collective basis.

Appendix A - Summary of issues from the survey arising per individual town centres

Ballincollig:

- Highest level of vacancy of surveyed towns primarily due to the Old Quarter redevelopment.
- Strong performance of the Main Street needs to be maintained.
- Area south of Main Street would benefit from redevelopment and other public realm improvements.
- Caution needs to be exercised in relation to out of centre uses including retail and their potential to impact on town centre. A number of such uses are already occurring.
- Directional signage to car parking areas could be improved.
- General improvement in shopfronts and signage would be a positive addition to the town.

Bandon:

- High level of vacancy is of concern particularly on South Main Street.
- Impact of heavy goods traffic on environmental quality of some streets, particularly on North Main Street (part of the R586)
- Uses with a retailing element in out-of-centre locations have the potential to undermine the vibrancy and vitality of the town centre.
- Derelict, brownfield and opportunity sites directly adjoining and within the town centre need to be prioritised for redevelopment.
- Visual improvement of many buildings and shopfronts is required including painting, refurbishment and appropriate signage.
- A linked network of pedestrian orientated public space should be developed for the town. Overall improvement to the open space network should be prioritised.
- Overall quality of public realm could be improved in order to enhance pedestrian flow. Renewal and widening of footpaths would benefit the pedestrian environment. Level of car free public space could be improved.
- Further improvements and development of the heritage of the town should be promoted.
- Overall quality of car parks could be improved while opportunities for new car parking areas particularly central ones should be investigated. Need for overall parking management strategy.
- Pedestrian permeability needs to be enhanced where possible including the addition of further pedestrian crossing points.

Bantry:

- Out of centre retail use needs to be carefully considered in the context of the relatively low vacancy rates within the retail core.
- Opportunity sites within the town centre area need to be prioritised for future development.
- Impact on the town centre of through traffic to the environmental quality of the streets due to congestion, impact of HGV's, etc. Dereliction is a potential end result for buildings on Marino Street if situation is not improved.
- Improving overall quality of shopfronts and general improvement of buildings necessary where appropriate.
- Overall public realm improvements including footpath widening are necessary in order to enhance footfall, improve overall public realm and environmental amenity.
- Opportunity exists to develop an overall coherent network of public open space through the town.
- Congestion associated with on street parking and the overall quality of car park provision are issues that need consideration.
- Town has immense potential which could be realised in the environmental improvements outlined.

Carrigaline:

- Vacancy needs to be monitored to ensure no disimprovement of the present situation.
- Derelict, brownfield and opportunity sites need to be prioritised.
- Visual appearance of Main Street needs to be improved.
- Uses with a retailing element in out-of-centre locations are potentially undermining the vibrancy and vitality of the town centre.
- Overall unity and visual coherence of town centre needs to be improved.
- Inappropriate uses to the town centre need to be relocated over time.
- Pedestrian permeability needs to be enhanced where possible including the addition of further pedestrian crossing points.
- Parking and traffic dominates the main street. Balance needs to be redressed in favour of the pedestrian.
- Need for substantial public realm improvements e.g. increased footpath width, shopfront signage improvements, overall unity of design and coherence.
- Visual clutter from first floor protruding signage, overhead wires, traffic and parking dominance.
- Addition of focal civic or public space within the town would be of benfit to the town and would contribute to the social and community function of the town centre.
- Entrances to the town need to be improved visually.
- On street parking needs better management and should be reduced where possible. Directional signage to grouped car parking needs to be improved.
- Diversity and quantity of comparison retailing needs to be expanded.
- Formal retail space for farmers market in town centre location needs to be encouraged.

Clonakilty:

- Limited opportunity sites exist for new build in the town due to the fine grain of the existing townscape. This could increase pressure to relocate uses outside of the town centre.
- High profile vacant and recently completed units in the town need to be targeted for occupancy.
- Increasing overall footpath widths and enhancing the overall pedestrian priority would be a positive addition to the town.
- Overall parking strategy needs to be developed for the town with the lack of a reasonably sized centralised car parking space is a possible issue.
- The challenge for Clonakilty is to continue to maintain the attributes which contribute to the attractiveness of the town and allow it to remain at the top of its game.

Cobh:

- Very high vacancy rates on all streets is of concern.
- The relatively large commercial town centre area caters for a demand which has waned over a number of decades and may no longer be fit for purpose.
- High proportion of charity shops and discount stores in the town.
- Town centre displays an absence of any internationally recognisable multiples (franchises or chains)
- Additional comparison uses occurring at Ticknock have the potential to undermine the town centre.
- Creative use of existing building stock, brownfield sites and strategic land assembly will be necessary for larger developments particularly considering the topographical constraints in the town.
- Some poor quality shopfronts, high vacancy and neglect of certain areas is of concern.
- Dominance of car parking, including taxi rank space, at the expense of more generous pedestrian space is evident. Consideration needs to be given to enhancing paved pedestrian public space and creation of more generous civic and al fresco dining space.
- Waterside use area in the harbour needs visual improvement and to be better maintained

- Grouped parking areas are somewhat remote from town core. Alternative grouped parking in the town centre may need to be considered.
- Branding, Marketing and Vision for the town is needed to capitalise on its unique sense of place. What is the principle role of the town and what does it want to achieve in this regard? Could the tourism/destination role be further improved along with more sustainable development options?
- Lack of passing trade and through daily traffic present the town with more challenges to sustain footfall than other towns surveyed.

Fermoy:

- Vacancy needs to be monitored to ensure no further deterioration.
- Central brownfield and other opportunity sites need to be targeted and prioritised to promote renewal and consolidate development.
- Caution needs to be exercised in relation to out of centre uses and their potential to impact on town centre.
- Town could be complemented by the addition of further civic space or a network of such spaces.
- Public Realm improvements such as increased path widths, etc should be considered in line with other successful examples in the town.
- Impact of through traffic (particularly HGV traffic avoiding tolls) and the dominance of on street parking is having a negative impact on the overall public realm.
- Lack of a centralised farmers market space in the town.
- Parking signage and directional signs to parking areas could be improved significantly.

Mallow:

- Vacancy needs to be monitored to ensure no disimprovement of the present situation.
- Uses with a retailing element in out-of-centre locations need to be carefully considered.
- Derelict, brownfield and opportunity sites need to be prioritised. Key derelict sites on Main Street need to be targeted for renewal.
- The visual clutter caused by wiring, first floor protruding signage and excessive dominance of parking and traffic is detracting from the overall environmental quality of the Main Street in particular. Space devoted to on street parking and taxi ranks could be considered excessive.
- The town is particularly traffic dominated (with parking on both sides of the street) and can be both visually and physically cluttered at the street level particularly during busy periods.
- Many positive improvements to footpaths (especially resurfacing)in the town have occurred in recent years however there are additional opportunities for widening and rebalancing the streets in the town in favour of the pedestrian.
- Improve pedestrian crossings and overall pedestrian permeability.
- Visual improvement of many buildings and shopfronts is required including painting, refurbishment and provision of appropriate signage.
- Improvements in cleanliness and maintenance in the town are required (reflected in the poor Tidy Towns score)
- Traffic especially HGV's impact the overall quality of the Bridge Street area to the East of the town with correspondingly high vacancy levels and associated negative environmental impacts.
- Additional centralised civic or public space within the town and pedestrianisation would be of benefit to the town and would contribute to the social and community function of the town centre.
- Directional signage, availability and layout of grouped car parking areas could be improved generally. Overall car parking strategy needs to be considered. The arrangement is somewhat fragmented at present.
- Are other car parks disadvantaged by fact that Market Square Shopping Centre has no parking charges?
- Town Centre lacking a central prominent location for a farmers market which could considerably benefit the town.

- Overall challenge is to develop Mallow into the National Spatial Strategy Hub town from its base as a traditional market town.

Midleton:

- Central brownfield and other opportunity sites need to be targeted and prioritised to promote renewal and consolidate development.
- Significant growth has occurred in the town centre and edge of town centre. Consolidation of the current town centre/retail core needs to be a priority.
- Expansion of retail/retail warehousing to more peripheral and out of centre locations is potentially threatening the vibrancy and vitality of the town centre.
- Improvements in cleanliness and maintenance in the town are required (reflected in the poor Tidy Towns score)
- Opportunities for central public realm improvements need to be considered. Proportion of space devoted to pedestrians could be improved in core areas in order to improve pedestrian flow and the overall environmental quality of the town.
- A linked network of pedestrian orientated public space should be developed.
- Management and layout of on street parking needs to be given further consideration particularly with the dominance of parking on streets in the town.
- Quality of car parks could be improved generally with overall strategy for car parking required.
- Directional signage for grouped car parking needs to be improved.
- Overall pedestrian permeability including the provision of additional pedestrian crossing points need to be improved.

Mitchelstown:

- Visual improvement of some buildings required in terms of signage, overall maintenance and better quality or appropriate shopfronts.
- Vacancy needs to be monitored to ensure there is no further deterioration. This is particularly the case on Upper Cork Street.
- Brownfield and other opportunity sites near the town centre need to be targeted for investment.
- Improvements in cleanliness and maintenance in the town are required (reflected in the poor Tidy Towns score)
- Footpath upgrading on Upper Cork Street is required.
- Pedestrian permeability could be improved particularly towards the Tesco Shopping Centre to the South of the town.

Skibbereen:

- Very high level of overall vacancy in the retail core.
- Visual improvement of many buildings and shopfronts is required including painting, refurbishment and appropriate signage.
- Dereliction is evident in some central areas.
- Central brownfield and other opportunity sites need to be targeted and prioritised to promote renewal and consolidate development.
- Out of centre retailing has the potential to threathen the viability of the town further
- Connectivity from the town centre retail core and edge of centre retail (south of town) needs to be enhanced.
- Overall improvements to the public realm including increasing pedestrian space, widening and upgrading of footpaths need to be promoted.
- Continue to develop and improve the focus of the town towards the River Ilen.
- High proportion of charity shops and discount stores in the town.
- Car parking dominates on many of the key streets to the detriment of the pedestrian. Balance needs to be redressed.
- Quality of public parking could generally be improved.

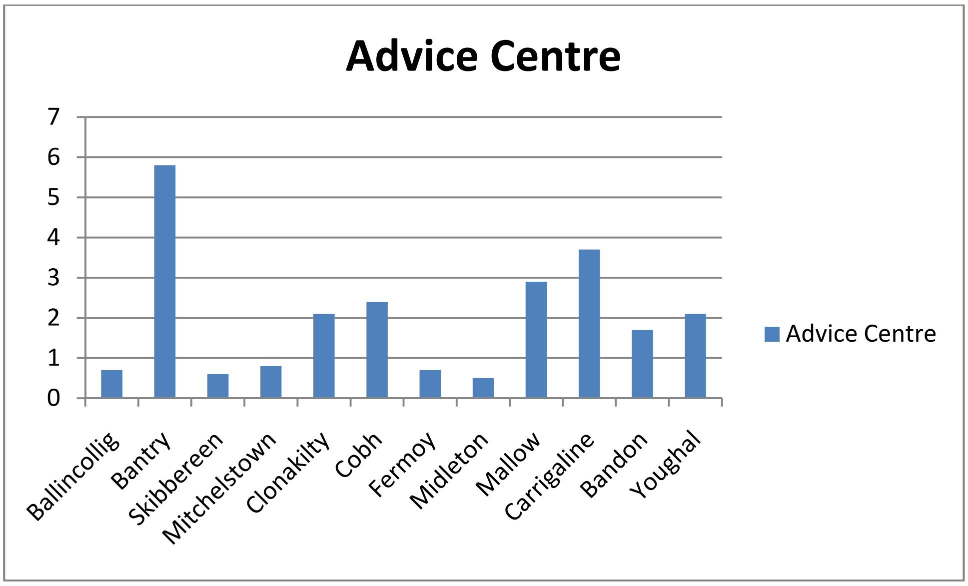
- Recreational amenity of the town centre overall could be improved.
- The relatively large commercial town centre area caters for a demand which has waned over a number of decades and may no longer be fit for purpose.

Youghal:

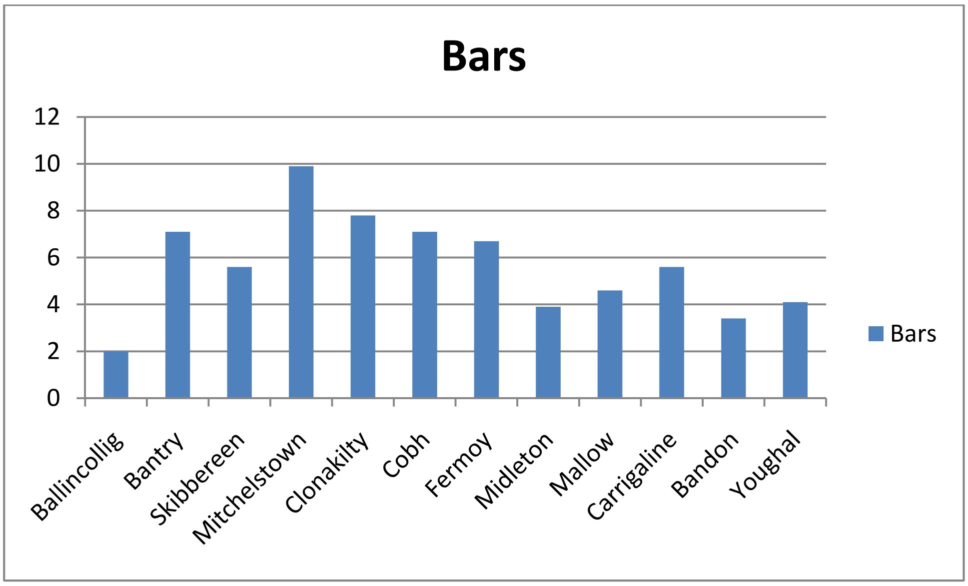
- Recent closures and the high level of overall vacancy in the town (over 25%) are of concern.
- Vacancy on the Main Street is one of the highest in the County (of the surveyed towns)
- Priority needs to be focussed on enhancing and unlocking the potential of the town centre. The fine grain of the town centre creates considerable challenges in relation to locating modern retail outlets.
- Uses with a retailing element in out-of-centre locations are potentially undermining the vibrancy and vitality of the town centre.
- Overall strategy for the harbour/waterside area is required to consolidate and regenerate the town centre and harbour area.
- Central brownfield and other opportunity sites (including vacant units) need to be targeted and prioritised to promote renewal and consolidate development.
- Overall quality of public realm could be improved. Renewal and widening of footpaths would benefit the pedestrian environment. Level of car free public space could be improved. Opportunities in this area should be explored.
- Needs to be more consistency in the width of footpaths with overall aim to increase width and renew in favour of attracting additional pedestrian flow.
- Pedestrian crossing points and overall pedestrian permeability needs to be improved.
- Car Parking clutter particularly on Main Street is an issue for the town.
- Public and media perceptions that the town is in decline are an issue for the overall image of the town.
- Improvement of buildings necessary including building maintenance, improvement and adaption for re-use.
- Directional signage and overall quality of car parks could be significantly improved.
- Vacancies on the approach to the town need to be tackled in relation to the visual impression of the town.
- Possibility for a farmers market in a central location in the town should be revisited.
- Challenges to planning and future development need to be overcome in this historic Heritage Town.
- Branding, Marketing and Vision for the town is needed to capitalise on its unique sense of place. What is the principle role of the town and what does it want to achieve in this regard? Could the tourism destination role be further improved along with more sustainable development options?
- Further sprawl of the overall town needs to be contained particularly in relation to commercial/retail development. Town Centre overall needs to be consolidated.
- The relatively large commercial town centre area caters for a demand which has waned over a number of decades and may no longer be fit for purpose. Consolidation and return to residential use may need to be considered in some areas.

Appendix B: 10 Sample Uses of Total Proportion of Town Survey Areas devoted to specific uses

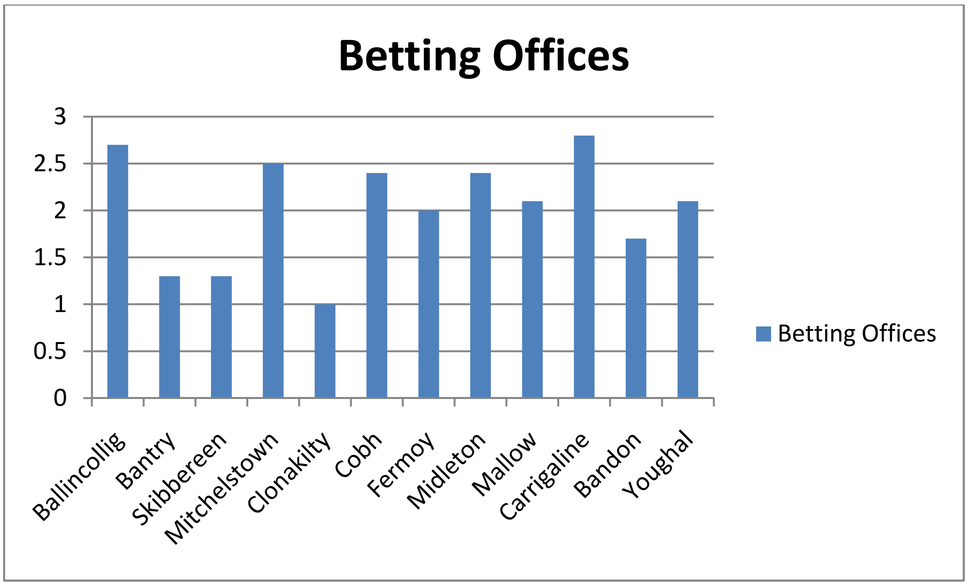
A number of different uses were selected in order to compare the characteristics of different towns. The following 10 uses were compared across each of the 12 towns.



Bantry has the highest proportion of Public Advice Centres.

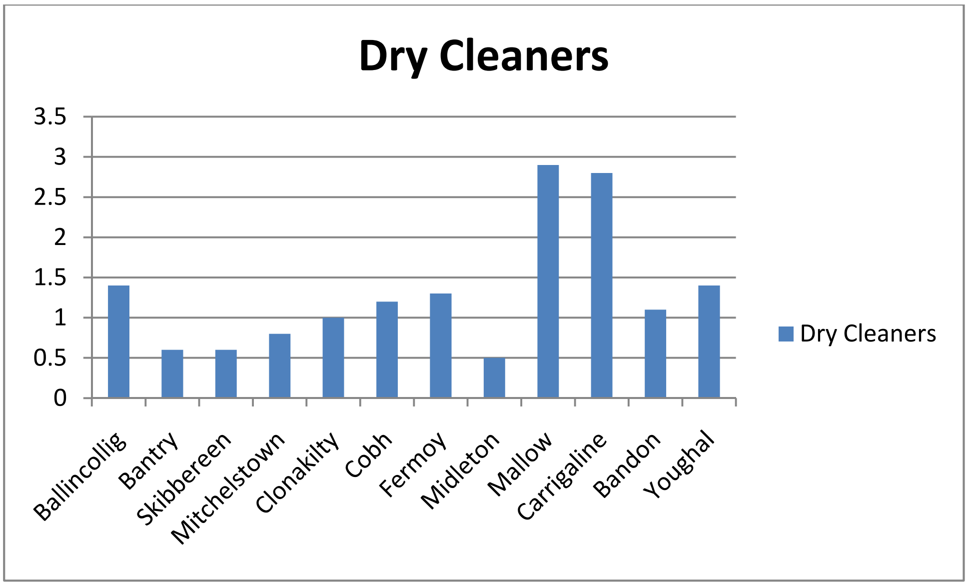


Mitchelstown, Clonakilty, Cobh and Bantry have the highest percentage of bars/pubs of the surveyed towns while Ballincollig town centre proportionally has the lowest. Recent downturn in terms of alcohol sales from public premises mean that future vacancies in towns with a larger supply could be an issue.

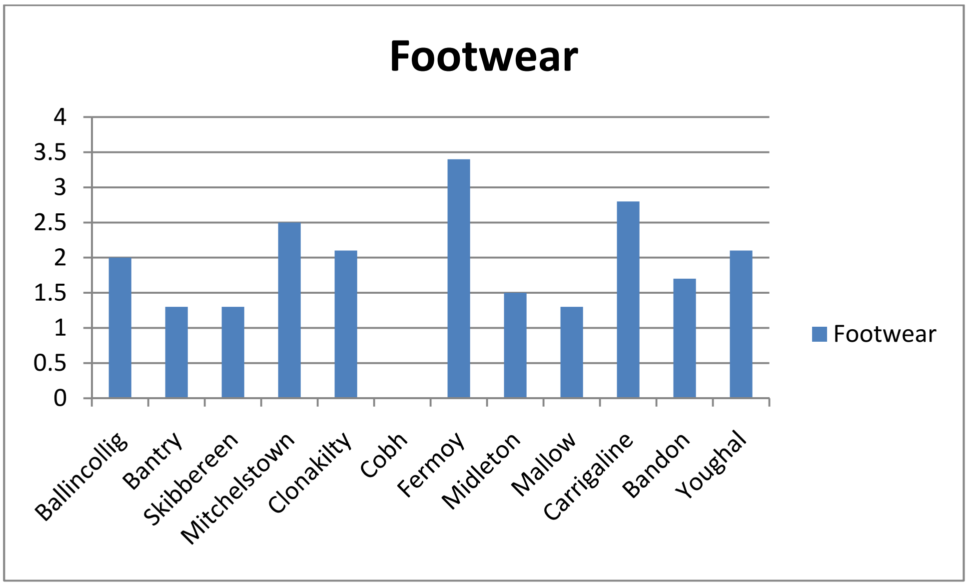


Carrigaline and Cobh have the highest number of Casino/Betting Offices. Bantry and Skibbereen had proportionally less than average while Clonakilty has the lowest.

All towns display the presence of charity shops. Bantry, Skibbereen, Clonakilty, Youghal, Cobh and Bandon have a particularly high representation of such uses. Coincidentally 4 of these 6 towns have the highest level of vacancies of the surveyed towns. Are charity shops capitalising on the cheaper rents that may be on offer in vacant premises and perhaps futher masking vacancies?

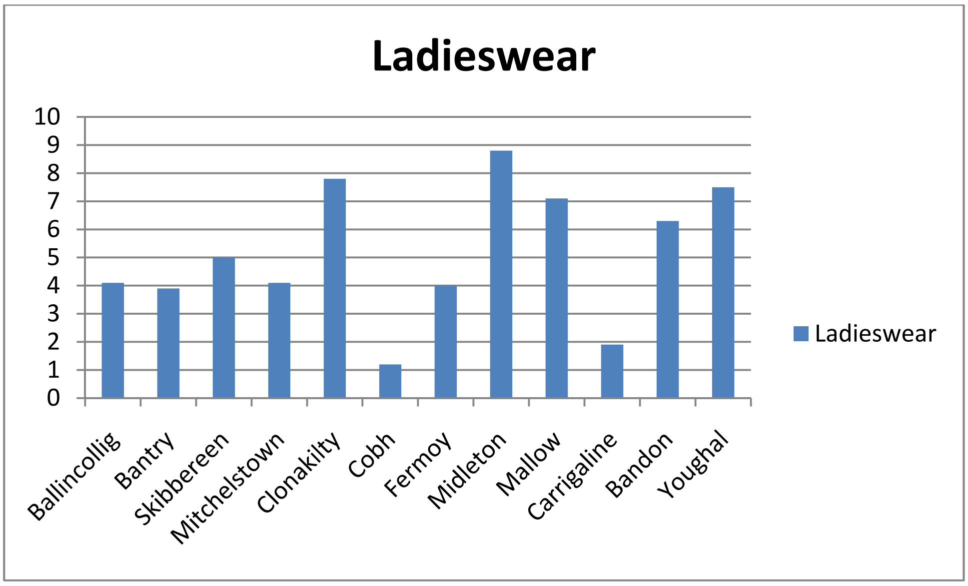


Mallow and Carrigaline have a high representation of Dry Cleaners.

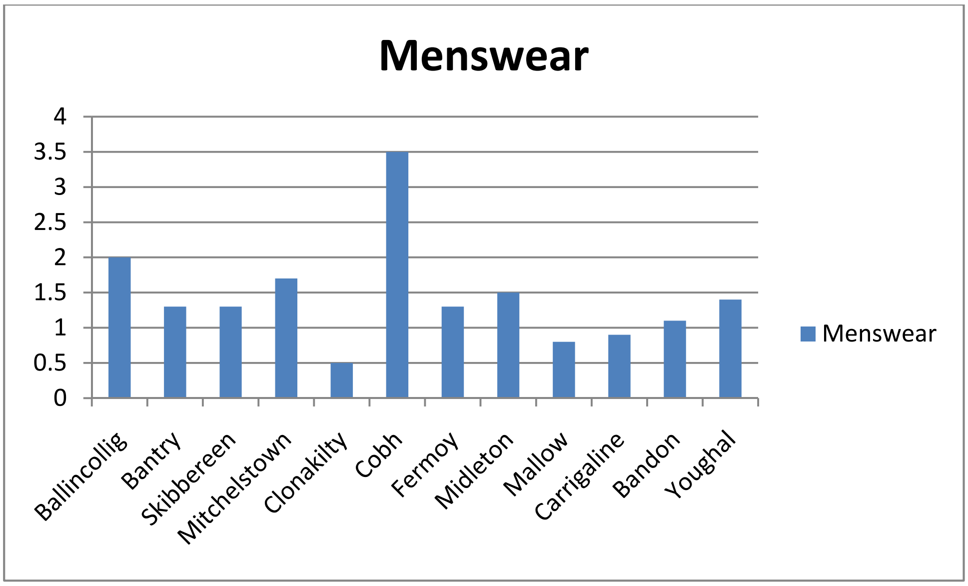


Fermoy has the highest proportional representation of footwear shops followed by Carrigaline and Mitchelstown. Cobh meanwhile has no recognisable footwear shop which may be indicative of Cobh's weaker position in relation to comparison retailing attractions.

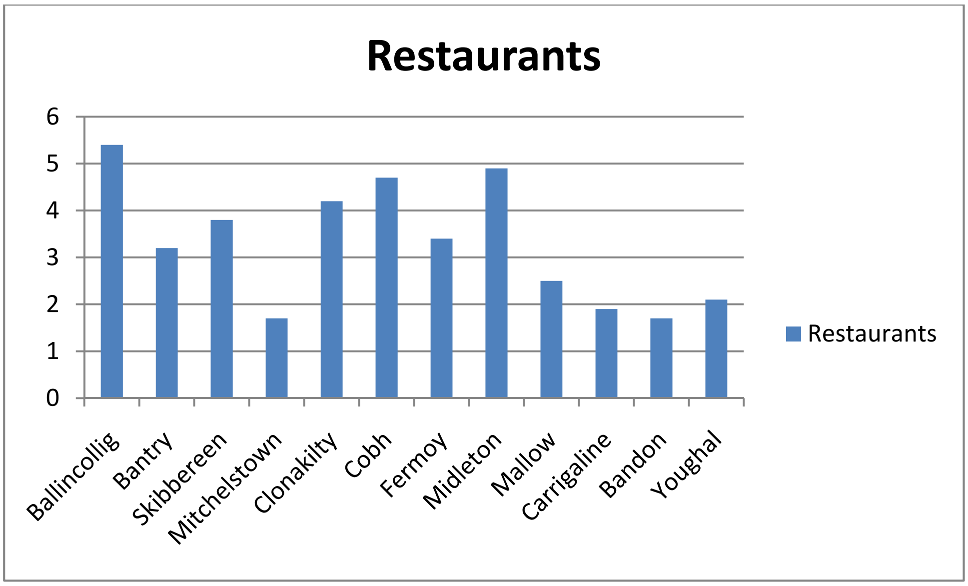
All towns generally have a very strong representation of hairdressers/barbers. Ballincollig, Mallow and Carrigaline are leaders in this respect.



Midleton has an unusually high representation of Ladieswear along with Clonakilty. Anecdotally these are known as places to shop for Ladieswear. Proportionally Youghal, Mallow and Bandon are also well represented in this category. Cobh and Carrigaline are poorly represented in this category.



The proportion of Menswear shops per settlement is generally low and are outscored by Ladieswear & Accessory shops overall by over 3 to 1. Cobh unusually displays the highest proportion of Menswear shops.

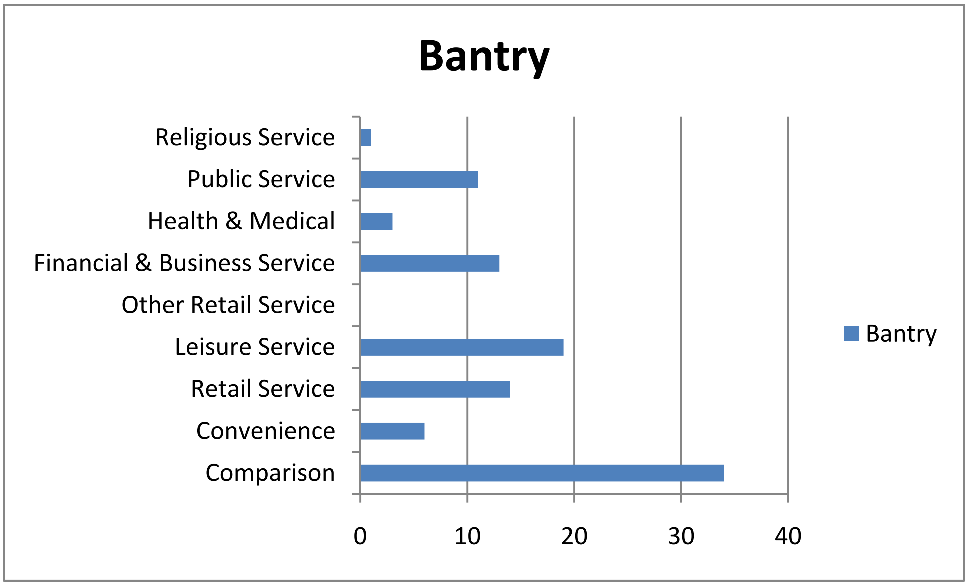


Ballincollig, Cobh, Midleton and Clonakilty generally score well with regard to formal restaurants. Mitchelstown and Bandon appear to perform poorly in this regard.

Within many of the towns the most popular uses are in the Comparison sector Ladieswear & Accessories and Charity Shops. In the convenience sector butchers remain a staple use in most towns along with supermarkets and grocery stores. Popular retail services in all towns are hairdressing salons, barbers and health and beauty clinics while there was some evidence of a popular resurgence in shops catering for Repair, Alterations and Restorations. Popular leisure services consisted of Bars/Public Houses, Cafes, Fastfood Outlets and Restaurants. There was also strong evidence of financial and business services in certain town centres surveyed while Bantry, Youghal and Bandon were particularly strong in the area of central public services.

<u>Example of a Town Specific Comparison</u> – could be done for other towns.

Bantry:



Bantry has a strong proportion of comparison retailing but one of the lowest levels of convenience retailing of the surveyed towns.

Appendix C: GOAD Classification of Use Table

GOAD Classification – General:	
GOAD Class	**GOAD Sub-class**
Retail	• Comparison • Convenience • Retail Service • Other Retail
Services	• Leisure Services • Financial & Business Services • Health & Medical Services • Public Service • Religious Service
Vacant	• Vacant Retail

GOAD Sub-Class Classification:	
GOAD Sub-Class	**Primary Activity (Code)**
Comparison	• Antiques shops (COM 1) • Art & Art dealers (COM 2) • Booksellers (COM 3) • Carpets and Flooring (COM 4) • Charity Shops (COM 5) • Chemists & Drugstores (COM 6) • Children's & Infants Wear (COM 7) • Crafts, Gifts, China & Glass (COM 8) • Cycles & Accessories (COM 9) • Department and Variety Stores (COM 10) • DIY and Home Improvement (COM 11) • Electrical & Other Durable Goods (COM 12) • Florists (COM 13) • Footwear (COM 14) • Furniture (COM 15) • Gardens & Equipment (COM 16) • Greeting Cards (COM 17) • Hardware & Household Goods (COM 18) • Jewellery, Watches & Silver (COM 19) • Mixed Clothing (COM 20) • Ladies Wear & Accessories(COM 21) • Leather & Travel Goods (COM 22) • Men's Wear & Accessories (COM 23) • Music & Musical Instruments (COM 24) • Stationers (COM 25) • Office Supplies (COM 26) • Other Comparison Goods (COM 27) • Photographic (COM 28) • Second Hand Goods & Books (COM 29) • Sport's Camping & Leisure Goods (COM 30) • Telephones & Accessories (COM 31) • Textiles & Soft Furnishings (COM 32) • Toys, Games & Hobbies (COM 33) • Vehicle & Motorcycle Sales (COM 34) • Vehicle Accessories (COM 35) • Opticians (COM 36)
Convenience	• Bakers & Confectioners (CNV 1) • Butchers (CNV 2) • Convenience Store, Groceries & Frozen Food (CNV 3) • Delicatessen (CNV 4) • Fishmonger (CNV 5) • Health Foods (CNV 6) • Markets (CNV 7)

GOAD Sub-Class Classification:	
GOAD Sub-Class	**Primary Activity (Code)**
	• Off Licence (CNV 8) • Shoe Repairs, etc. (CNV 9) • Supermarkets (CNV 10) • Confectionary, Tobacconist, Newsagent (CNV 11)
Retail Service	• Clothing and Fancy Dress Hire (RS1) • Dry Cleaner & Laundrette (RS2) • Filling Stations & Garages (RS3) • Health & Beauty (e.g. beauticians, nail bars) (RS4) • Hairdressers/Barbers (RS5) • Other Retail Outlets (RS6) • Photo Processing (RS7) • Photo Studio (RS8) • Post Offices (RS9) • Repair, Alterations & Restoration (RS10) • Travel Agents (RS11) • Vehicle Rental (RS12) • Vehicle Repair & Services (RS13)
Other Retail	• Shops (OR 1)
Leisure Services	• Bars, Wine Bars & Public House (LS1) • Bingo & Amusement (LS2) • Cafes (LS3) • Casino & Betting Offices (LS4) • Cinemas, Theatres & Concert Halls (LS5) • Clubs (LS6) • Disco, Dance & Nightclub (LS7) • Fast Food & Takeaways (LS8) • Hotels & Guest Houses (LS9) • Restaurants (LS10) • Sports & Leisure Facilities (LS11)
Financial & Business Services	• Building Society (FBS1) • Building Supplies & Services (FBS2) • Business Goods & Services (FBS3) • Employment & Careers (FBS4) • Financial Services (FBS5) • Legal Services (FBS6) • Other Business Services (FBS7) • Printing & Copying (FBS8) • Property Services (FBS9) • Retail Banks (FBS10)
Health & Medical Services	• Chiropodist (HMS 1)

GOAD Sub-Class Classification:	
GOAD Sub-Class	**Primary Activity (Code)**
	• Dental Surgery (HMS 2) • Doctors surgery (HMS 3) • Health Centre(HMS 4) • Nursing Home (HMS 5) • Osteopath (HMS 6) • Other Health & Medical Service (HMS 7) • Rest Home (HMS 8) • Veterinary Surgeon (HMS 9)
Public Service	• Advice Centre (PS1) • Community Centre (PS2) • Council Offices (PS3) • Educational Establishment (PS4) • Emergency Services (PS5) • Information Centre (PS6) • Kindergarten (PS7) • Library (PS8) • Museum & Art Gallery (PS9) • TA/Cadet Centre (PS10) • Tourist Information (PS11)
Religious Service	• Place of Worship (REL)
Vacant	• Vacant Shop (VAC 1)