

# Retail Impact Assessment

For Development at Kilmoney, Carrigaline

on behalf of Reside Investments Ltd.

June 2022



McCutcheon Halley  
CHARTERED PLANNING CONSULTANTS

# Document Control Sheet

<b>Client</b>	Reside Investments Ltd.	
<b>Project Title</b>	Retail Impact Assessment	
<b>Document Title</b>	Retail Impact Assessment	
<b>Document Comprises</b>	<b>Volumes</b>	One
	<b>Pages</b> (Including Cover)	29
	<b>Appendices</b>	N/A
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<b>Office of Issue</b>	Cork	
<b>Document Information</b>	<b>Revision</b>	A
	<b>Status</b>	Final
	<b>Issue Date</b>	June 2022

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# 1. Introduction

This Retail Impact Assessment (RIA) has been prepared by McCutcheon Halley Planning Consultants on behalf of Reside Investments Limited. This report is submitted in support of a planning application for full planning permission for the construction of 3 no. retail units (with a total floorspace of 3,158sq m), 244 no. residential units consisting of 202 no. apartment in 2 no. blocks ranging in height up to 6 to 7 storeys and 22 no. townhouse/duplex units, 1 no. childcare facility and residential amenity and all associated ancillary development works at Kilmoney (townland), Kilmoney Road, Carrigaline, Co. Cork.

The primary purpose of this RIA is to provide a quantitative and qualitative assessment of the proposed retail units/floorspace in accordance with the proper and sustainable retail planning for the area and is consistent with the relevant retail and planning policies including the Retail Planning Guidelines for Planning Authorities (April 2012), Cork County Development Plan 2014, Cork County Draft Development Plan 2022, the Ballincollig Carrigaline Municipal District Local Area Plan 2017, the Metropolitan Cork Retail Strategy 2015, and other relevant planning policy material.

The RIA addresses the nature and floorspace of existing retail space in the catchment area and whether additional comparison and convenience shopping of this nature can be sustained based on the catchment population and available retail spend. The RIA also assesses the proposed development within the context of retail hierarchy of Carrigaline and determines the potential impact of the proposed retail floorspace in the proposed development.

## 1.1 Sources of Information

A review of the relevant national and local policies provides the context for this RIA and guides the recommendations in relation to the required retail provision for Cork. It has been prepared having regard to the following plans and guidelines:

- Retail Planning Guidelines for Local Authorities 2012;
- Cork County Development Plan 2014;
- Cork County Draft Development Plan 2022;
- Ballincollig Carrigaline Municipal District Local Area Plan 2017;
- Metropolitan Cork Retail Strategy 2015;
- Central Statistics Office Census 2016.

## 2. Site Context

### 2.1 Application Site

The proposed development is located within the townland of Kilmoney in the town of Carrigaline, which is identified as a 'Metropolitan Town' in the Ballincollig Carrigaline Municipal District Local Area Plan 2017 and the 2014 and 2022 Cork County Development Plans. The subject site is located to the west of the Carrigaline town centre and is approximately 10km southeast of Cork City Centre. The site lies to the south of the N28 Cork and Ringaskiddy route. The total site area is 3.07 hectares (gross) and has a predominately flat topography. The total net developable area of the site is 1.9 hectares.



Figure 1: Subject site boundary highlighted in red.

The subject site is within the townland of Kilmoney to the southwest of Carrigaline town. The site is approximately 250m from Main Street. The site can be accessed via the inner western relief road (currently under construction, to be completed in 2022) as well as Main Street/Cork Road/R611 that provides immediate access throughout the town and connects to the N28. There is a mixture of uses that surround the site but are most referred to as retail, residential, and institutional. This includes the variety of retail stores, neighbouring estates, as well as various educational facilities. The site itself is generally level and comprises undeveloped greenfield lands, apart from the eastern appendage/connection to the main street, which runs through Dairygold's lands.

It is key to note that the Carrigaline area benefits from a wide selection of community facilities and services including doctor and dentist clinics, library, retail outlets, post office, sport and community facilities, gyms, parks, banks, and churches. Most of these services are located 2 – 5 km from Carrigaline town centre or are located within the town centre itself.

Retailers in this area include Dunnes Stores, Collin's SuperValue, Phelan's Pharmacy, Quay Co-Op, and Boots. The SuperValue is part of the Carrigaline Shopping Centre that provides a variety of shops and services for residents.

The immediate surrounding area is mainly characterised by the town centre uses, encompassing a mix of both retail and residential units with greenfield space directly to the West of the site. However, this will change with the completion of the Western inner Relief Road that will run along the western boundary of the site and connecting to the residential estates across the Owenabue River at Ballea Road to the north.

## 2.2 Proposed Development

The proposed development consists of the construction of 3 no. retail units (with a total floorspace of 3,158sq m), 224 no. residential units consisting of 202 no. proposed apartments in 2 no. blocks, ranging in height up to 6 to 7 storeys and 22 no. townhouse/duplex units, a 184m<sup>2</sup> creche/childcare facility, the provision of landscaping and amenity areas to include play/kick about areas, an activity trail/greenway, a gathering area/amphitheatre with tiered seating areas, a civic space/promenade and 2 no. courtyard areas, residential amenity/management spaces and all associated ancillary development including vehicular access and a cycle/pedestrian connection on to the Main Street (R611) and town centre area (via an activity trail/greenway along the river).



Figure 2: Proposed Site Layout

## 3. Planning Policy Context

### 3.1 Guidelines for Planning Authorities: Retail Planning April 2012

The Retail Planning Guidelines (RPG'S) provide a framework for assessing retail development with 5 key objectives:

- i) Ensure that all future development plans incorporate clear policies and proposals for retail development;
- ii) To facilitate a competitive and healthy environment for the retail industry of the future;
- iii) To promote forms of development which are easily accessible – particularly to public transport – in a location which encourages multi-purpose shopping, business and leisure trips on the same journey;
- iv) To support the continuing role of town and district centres;
- v) A presumption against large retail centres located adjacent or close to existing, new or planned national roads/motorways.

The RPG'S provide guidance on the location of proposed new retail developments. The Guidelines recommend that a sequential approach is adopted to identify the most appropriate location for a retail development and Section 59 states that there is a presumption in favour of town / neighbourhood centre sites and secondly on the edge of town centre sites and that alternative out of centre sites should be considered only where it can be demonstrated that there are no town/neighbourhood centre or edge of centre sites which are suitable, viable and available.

The RPG'S note that it is commonly accepted that there are six main steps to the assessment of retail impact:

- i) identification of catchment or study area;
- ii) Estimation of expenditure available within the defined catchment or study area;
- iii) Estimation of the turnover of existing centres within the catchment area which are likely to be affected by a new development;
- iv) Estimation of the turnover of the new development for which a planning application is being lodged;
- v) Estimation of the quantum of consumer retail spending available in the catchment area which will be diverted from existing centres to the new retail development; this assessment normally highlights the diversion of expenditure by zone within the catchment area;
- vi) Aggregation of the zonal diversions from each centre to the new development to provide an estimate of trade diversion; trade diversion is then expressed as a proportion of a centre's turnover at the target year to provide a measure of impact.

### 3.2 Cork County Draft Development Plan 2022

The Cork County Draft Development Plan 2022's (2022 CDP) strategic objective ZU 18-17 that is aimed for town centre development aims to:

*Promote the development of town centres and neighbourhood centres as the primary locations for retail and other uses that provide goods or services principally to visiting members of the public. The primary retail areas will form the main focus and preferred location for new retail development, appropriate to the scale and function of each centre and in accordance with the Retail Strategy. Residential development will also be encouraged particularly in mixed-use developments while the use of upper floors or retail and commercial premises in town centres for residential use will in particular be encouraged.*

The 2022 CDP notes the low amount of comparison retail units within Carrigaline. To resolve vacancy issues and encourage compact retail development the plan states:

*“To strengthen the retail service in the town this Plan considers that the best approach is to focus future expansion close to the main street...a greater commercial offering in the town centre will attract locals inwards...In order to strengthen the core area and promote increased footfall levels, it is essential that the location of any future significant retail development consolidates the core and relates positively to the planned inner western relief road.”*

In the 2022 CDP the site is zoned for town centre uses as part of the following CL-T-01 objective:

*“CL-T-01: This area denotes the built existing footprint of the town centre and any proposals for development within this core area should comply with the overall uses acceptable in town centre areas. The western inner relief is due to commence construction in 2021 and the delivery of this road offers opportunities to deliver an updated public realm for the town including the introduction of new public spaces. These should be designed to accommodate a number of community functions including a market space, festival space, meeting place, seating area etc. The desirable location of these future public spaces are: • The site of the existing car park adjoining the Main Street and River; • Within the town centre expansion area west of the Main Street and should form part of a wider public realm strategy for the town. Community uses which will be considered appropriate for this site include youth facilities, theatre, cinema, town hall/multi-purpose building and town square. Within the site there will be opportunity for regeneration and town centre expansion. The road scheme will give priority to pedestrians and cyclists and will provide permeability to*



*the rest of the town including the open space area directly adjacent to the site (CL-GR-02)."*

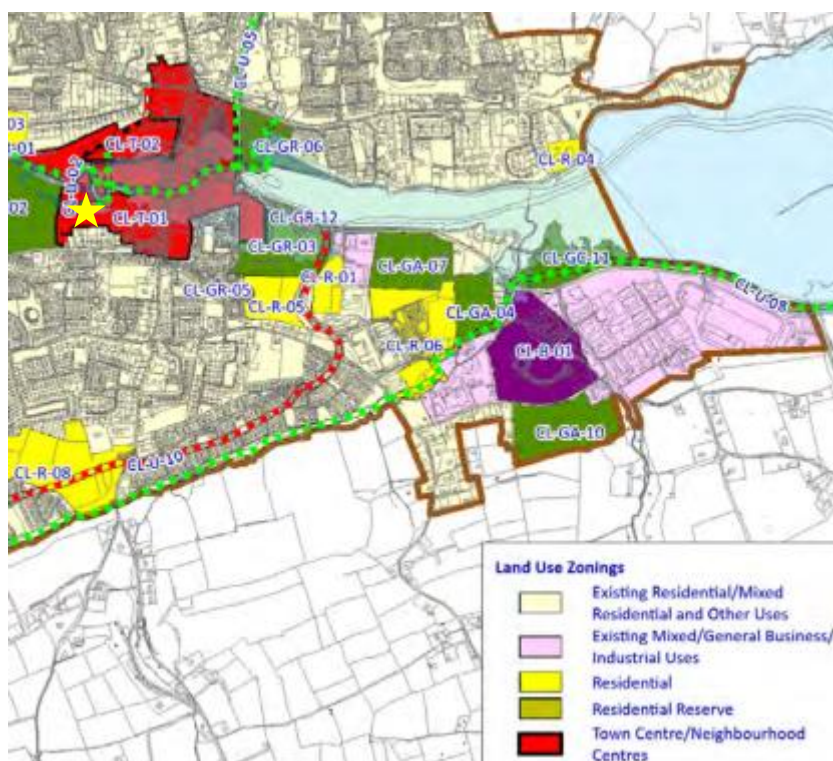


Figure 3: Extract from the 2022 CDP Zoning Map<sup>1</sup> for Carrigaline (site location indicated by yellow star).

### 3.3 Cork County Development Plan 2014

The Cork County Development Plan (CDP 2014) establishes a hierarchical network of settlements in the County, allocating related population and housing growth projections. Carrigaline is located within Metropolitan Cork Area and is designated as a 'Metropolitan Town' which forms part of the 'Cork Gateway' and is located within the rail corridor where major population, employment and housing development is encouraged and where the following strategic objective applies:

*Critical population growth, service, and employment centres within the Cork 'Gateway', providing high levels of community facilities and amenities with infrastructure capacity high quality and integrated public transport connection should be the location of choice for most people especially those with an urban employment focus.*

Policy CS 4 - 1 prioritises certain locations, including Carrigaline, to accommodate the planned population growth in the Cork Gateway region:

<sup>1</sup> Taken from draft 2022 CDP. Final zoning map not available at time of finalising report.

*n) In the Cork Gateway, development to provide the homes and jobs that are necessary to serve the planned population will be prioritised in the following locations... Carrigaline (Shannon Park)...*

The Plan also specifies its objectives pertaining to retail development. The Plan has developed retail objectives that is specific to the settlement hierarchy. For Carrigaline, Objective TCR 4 – 4 strives to:

*Support the vitality and viability of the metropolitan town(s) and to ensure that such centres provide an appropriate range of retail and non-retail functions to serve the needs of the community and respective catchment areas, with an emphasis on convenience and appropriate comparison shopping.*

Further, the plan utilises objective TCR 5 – 1 to highlight key areas that are fit for retail development, stating its objective to:

*Promote the County's town centres as a network of compact, vibrant, and attractive centres for retail and other appropriate activities. Local Area Plans will identify the 'primary' areas of town centres which will be the focus of future retail development. In addition, they will be proactive in providing localised guidance for individual settlements where appropriate'*

The specifics pertaining to the location of effective retail development in Carrigaline is addressed further under the Ballincollig Carrigaline Municipal District Local Area Plan 2017.

In the Metropolitan Cork Joint Retail Strategy (2015) and Study (2013) Carrigaline is designated as a 'Sub-Regional/Large Metropolitan Town'. Table 7.1 (Retail Network / Hierarchy and Objectives) of the County Development Plan 2014 outlines the Retail Hierarchy for the County and the general retail function and policy for neighbourhood centres is identified as follows:

*"Perform an important sub county retail role and generally include a good range of convenience provision and a varied provision of comparison offer. Such towns generally serve a large rural catchment. Preference for retail park developments to locate in or adjacent to the Town Centres, to ensure the potential for linked trips and commercial synergy. Cautious approach to proposals for edge/out of town retail warehouse developments."*

Under paragraph 7.6.2 of the CDP, it is stated that proposals for new retail development will demonstrate the following:

- That the floorspace proposed is appropriate having regard to the quantum and location of floorspace required in that centre;
- That the Retail Impact Assessment has been based on an appropriate catchment area. That the Retail Impact

Statement has taken account of extant permissions and their likelihood of being implemented.

- That the Retail Impact Statement has considered the extent and nature of existing vacant floorspace and its suitability for the type and scale of retail facility proposed (emphasis added).

The retail quantum's agreed between City and County for the Metropolitan Area to 2022 are set out in Table 7.2 of the CDP with the background information and detail in relation to quantum's set out in the MCJRS. In relation to Convenience floorspace within the Metropolitan Area the distribution will be in accordance with planned population growth. Carrigaline is included as part of the 'Rest of Metropolitan' Cork area where an additional 22,882m<sup>2</sup> of additional convenience retail floorspace is sought by 2022.

<b>Table 7.2: Floorspace – Proposed distribution of 2022 quantum for Metropolitan Area</b>			
Location	Comparison	Convenience	Bulky/R. Warehouse
Cork City Centre and Suburban Centres	63,081 (Cork City Centre) 24,961 (Suburban Centres)	20,291 (City and Suburban Centres including Douglas and Ballyvolane)	--
Rest of Metropolitan	16,397	22,882	--
<b>Total</b>	<b>104,439</b>	<b>43,173</b>	<b>57,555</b>

Figure 4: Table 7.2 Cork County Development Plan 2014

Based on objective TCR 9-1 from the 2014 CDP (which relates to vacancy and regeneration), it is an objective of the Council to develop a strategy to reduce vacancy during the lifetime of the plan by utilising measures which seek to manage and ease overall vacancy and to reduce the amount of vacant floorspace within core retail areas by 50% in the short term.

Under paragraph 7.11.2 of the CDP, the Council will where possible seek strong alignment with public transport and retail. By encouraging appropriate retail development in locations with good public transport facilities to encourage increased usage of public transport.

### 3.4 Ballincollig Carrigaline Municipal District Local Area Plan 2014

The 2017 Ballincollig Carrigaline Municipal District Local Area plan (LAP) outlines the development strategy for Carrigaline and sets out a clear aim for the 'Metropolitan Town' of Carrigaline:

*The strategic aim for Carrigaline is to consolidate the rapid growth of recent years broadly within the town's existing development boundary, protecting its important green belt setting while maintaining its distinctiveness as a self-contained Metropolitan Town with improvement of the town centre and the towns residential amenities."*

The lands are situated within the development boundary of Carrigaline and zoned for Town Centre Use as part of a larger CL-T-01 town centre zoning with the following objective:

*CL-T-01: This area denotes the built existing footprint of the town centre and any proposals for development within this core area should comply with the overall uses acceptable in town centre areas.*

*It is desirable that the inner western relief road is delivered prior to any further development. However, in order to prevent any undue delays to development, future proposals (which will include a community element) that are submitted prior to the construction of this road should be for limited development and accompanied by a detailed traffic management and access proposals. Any such development proposals in the CL-T-01 area will provide only pedestrian access to the main street. Vehicular access to such developments will not be provided directly from the main street.*

*Delivery of the inner relief road offers opportunities to deliver an updated public realm for the town including the introduction of new public spaces. These should be designed to accommodate a number of community functions including a market space, festival space, meeting place, seating area etc. The desirable location of these future public spaces are:*

1. The site of the existing car park adjoining the Main Street and River;
2. Within the town centre expansion area west of the Main Street and should form part of a wider public realm strategy for the town.

*Community uses which will be considered appropriate for this site include youth facilities, theatre, cinema, town hall/multi-purpose building and town square. Within the site there will be opportunity for regeneration and town centre expansion. The scheme will give priority to pedestrians and cyclists and shall provide permeability to*

*the rest of the town including the open space area directly adjacent to the site (CL-O-02).*

*The southern part of the site backing onto existing residential development on the Kilmoney Road may have a mix of residential development.” \**

\* (Flood Risk Assessment Required).

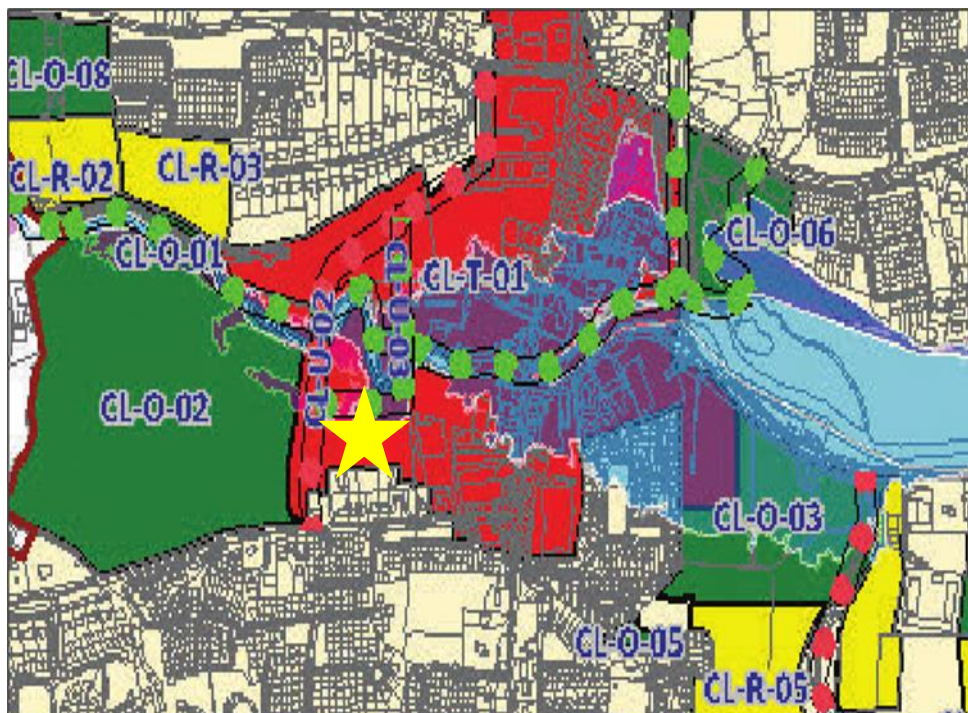


Figure 5: Zoning Map from the 2017 Ballincollig-Carrigaline Municipal District LAP (site location indicated by yellow star).

### 3.5 Metropolitan Cork Retail Strategy

The Retail Planning Guidelines 2012 require that the larger urban areas of the Country, including Cork City and County, to prepare retail strategies and policies for their areas and to address the following matters:

- Confirm the retail hierarchy, the role of centres and the size of the main town centres;
- Define the boundaries of the core shopping areas;
- Identify the additional floor-space requirements;
- Provide strategic guidance on the location and scale of retail development;
- Preparation of policies and action initiatives to encourage the improvement of town centres;
- Identification of criteria for the assessment of retail developments.

Cork City Council and Cork County Council jointly commissioned consultants to prepare the Metropolitan Cork Joint Retail Study, April 2013 (MCJRS), which sets out the background retail strategy for Cork City and County Councils and form the agreed basis on which each authority will be able to formulate appropriate development plan objectives or policies for retail development in its area and which will be used in the determination of applications for planning permission.

Table 6.3 of the MCJRS provides the following projected expenditure per capita:

Year	Convenience	Comparison
2011	€3,876	€3,641
2013	€3,876	€3,641
2019	€4,114	€4,222
2022	€4,239	€4,614

Table 1: Extract from Table 6.3 of the MCJRS

The MCJRS notes that despite the economic downturn over the last few years, convenience retailing has sustained a steady level of growth. The study notes that there was growth in expenditure on food from 2005 to 2007, with continuing steady performance through to 2012.

Table 6.16 of the MCJRS projects an indicative additional convenience floorspace requirement of 22,282 to 2022 for the rest of Metropolitan Cork including Carrigaline which is based on the figures provided by the Cork County Development Plan 2014 displayed in Figure 3. Section 7.2.7 of the MCJRS states that the distribution of future retail floorspace should be linked to the retail/settlement hierarchy and future distribution of population growth within the Metropolitan Area.

In the retail hierarchy for the Metropolitan Cork area identified in the MCJRS, Carrigaline is designated as a 'Level 2' or "Large Metropolitan Towns". The full retail hierarchy in the MCJRS is shown in table 7.2.1 below:

Table 7.2.1: Retail Hierarchy					
Level	Centre	Retail Hierarchy			
Level 1	Metropolitan	Cork City Centre			
Level 2	Large Metropolitan Towns	Ballincollig, Carrigaline, Cobh and Middleton	Level 2	District Centres	Blackpool, Douglas, Wilton, Mahon Point, Ballyvolane*, Docklands**, Hollyhill***
Level 3	Small Metropolitan Towns	Carrigtwohill****, Glanmire, Passage West, Blarney, Monard*****			
Level 4	Neighbourhood centres and large villages	Bishopstown, Bishopstown Court, Blackpool Village, Hollyhill, Tory Top Road/Curragh Road, Blackrock Hall (Ballinaure), Togher / Clashdubv Road, Mount Agnes Road, Avenue de Rennes, Skehard Road, Mayfield, The Lough, Cork Docklands Designated Neighbourhood Centres**, Tower, Little Island, Grange Road and villages within the Metropolitan area.			
Level 5	Local centres, corner shops and small villages				

Figure 6: Extract from Table 7.2.1 from the 2013 MCJRS

The MCJRS also sets out the policy objective for each of the levels within the retail hierarchy. The policy for 'Level 2' – Large Metropolitan Towns states that:

*"Level 2 in the retail hierarchy performs an important sub county retail role and generally include a good range of convenience provision and a modest provision of comparison offer. Such towns generally serve a large rural catchment. It is envisaged that retail expansion in these settlements should be in line with the planned population increase for these settlements should be focused on the consolidation of existing retail cores and providing further key retail development in order to provide for enhanced choice and competition for consumers. A key objective should be to provide a greater diversity and range of retail uses in such towns"*

The MCJRS recommends that Planning Authorities should facilitate the expansion of existing neighbourhood centres, where the uses and scale of development proposed is consistent with the catchment population and with the services typically found in a neighbourhood centre.

According to the study, this is supported through the rationale that:

*"Within the Metropolitan Cork Towns, the available floorspace should be distributed among the main centres at Ballincollig, Middleton, and Carrigaline, whilst also allowing for new floorspace at the principal neighbourhood centres, in order to avoid an imbalance of provision."*

In terms of turnover the MCJRS states that smaller units have substantially lower turnover per square metre than larger supermarkets which have

substantially higher turnover rates per square metre, and this should be factored into retail impact assessments.

The Metropolitan Cork Joint Retail Strategy compliments subsequent Development Plans as well as the Guidelines for Planning Authorities: Retail Planning in order to further clarify area-specific approaches to sustainable retail development. The Joint Retail Strategy supports the designations set out in previous policies and is noted under Policy 4: Large Metropolitan Town Centres which aims to:

*Support the vitality and viability of the Metropolitan Towns and to ensure that such centres provide an appropriate range of retail and non-retail functions to serve the needs of the community and respective catchment areas, in accordance with the retail hierarchy and the settlement strategy.*

It is important to note that the Retail Strategy specifically states that there is potential for expansion of comparison and convenience retail floorspace within the Metropolitan Town. This is stated under section 7.24.

### **3.6 Policy Summary**

The above policies, objectives, and strategies reveal the retail implementation strategy in accordance with the rapidly growing population of Metropolitan Cork, and strongly supports the provision of additional retail floorspace in town centre locations, such as Carrigaline.



## 4. Assessment of Retail Impact

The RPG's outline that planning applications for retail development proposals must comply with criteria relating to location, suitability of use, size and scale, and accessibility set out in the guidelines and relevant development plan. It follows that the proposal must be assessed against prospective impacts on the local retail environment.

### 4.1 Retail Catchment

Typically a 15-minute drive-time is used for a convenience and comparison retail store of this scale, to determine the catchment area for the proposed store. The catchment area includes Ringaskiddy, Ballygarven, Carrigaline, Crosshaven, Myrtleville, Minane bridge, and Nohaval. It is important to note that the retail catchment in this report does not extend to the city environs but includes a portion of the southern part of the Cork Metropolitan Area, due to there being no significant retail provision in this area.

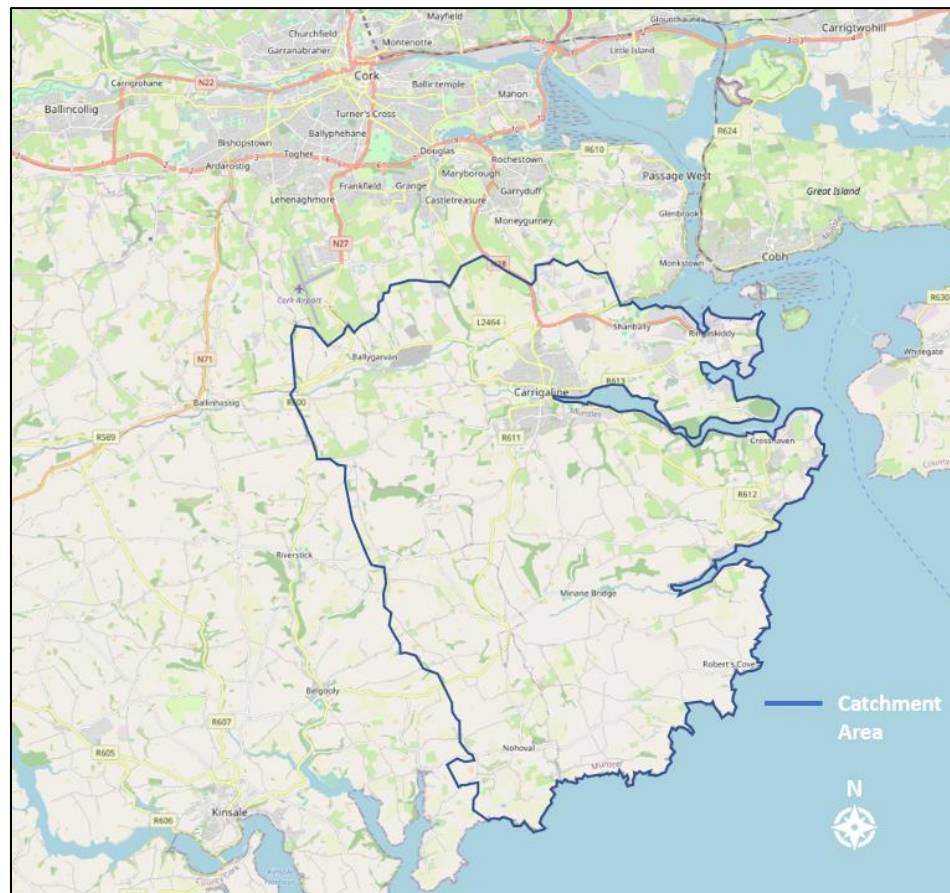


Figure 7: Catchment Area based on a 15-minute drive-time

Population projections for the catchment area are derived from adopted growth figures contained within the Cork Area Strategic Plan (CASP). The CASP 2020 (updated in 2008) informed development strategies based on growth projections and targets within Ireland. The annual growth rate has been disaggregated based on the population target figure to 2020 and rolled

forward on an annual basis for Carrigaline to return a base year (2016) and design year (2022) for the proposed development. Where a Small Area Population Statistic (SAP) is dissected by the catchment area, the population has been estimated based on the number of dwellings in that part of the SAP and the population per dwelling.

Taking account of growth rate envisaged by CASP and considering the population projections in the Cork County Draft Development Plan 2022, the residential population of Carrigaline was 15,770 in 2016 and is projected to be approximately 20,501 persons by 2028. Based on the 2022 Draft CDP, it can be assumed that Carrigaline is expected to grow in population by 4,731 residents from 15,770 to 20,501 by 2028.

Electoral Division	Population 2011	Population 2016	% Change
<b>Carrigaline (North)</b>	11,818	12,118	+2.5%
<b>Carrigaline (South)</b>	1,878	2,462	+31%
<b>Douglas</b>	2,039	2,104	+3.2%
<b>Ballygarvan</b>	172	178	+3.5%
<b>Liscleary</b>	3,947	4,177	+6.6%
<b>Templebreedy</b>	3,491	3,778	+8.2%
<b>Kilpatrick</b>	479	526	+9.8%
<b>Cullen</b>	246	248	+0.8%
<b>Ballyfeard</b>	179	187	+4.5%
<b>Nohoval</b>	281	316	+12.5%
<b>Farranbrien</b>	518	540	+4.2%
<b>Ballyfoyle</b>	355	362	+1.9%
<b>TOTAL</b>	<b>25,403</b>	<b>26,996</b>	<b>+6.3%</b>

Table 2: Census Population of Catchment Area 2011 – 2016

However, the total catchment area population must be considered. According to 2016 Census Data, the catchment area has a total of 26,996 in 2016. When calculating all populations for each Electoral District, the average population change for the catchment area between the 2011 and 2016 census is 6.5%. Therefore, there is a total increase of population each year by 319 residents. Applying a similar annual growth rate going forward gives a population of 29,335 by 2024.

As noted in Table 1 from this report, the Metropolitan Cork Joint Retail Strategy has an average of figure of €4,239 per capita of convenience goods, and €4,614 per capita for comparison goods. The 2022 figure identified in the

Metropolitan Cork Joint Retail Strategy is extrapolated for 2023 and 2024. By applying the per capita spending to the existing and projected population levels for the catchment area the total expenditure for convenience and comparison goods is calculated. Table 3 below estimates the available convenience spending available within the defined catchment. It returns an estimated available residential expenditure figure of €98.4 million for convenience in 2011, rising to €126.3 million in 2024 for convenience and €140.5 million for comparison goods.

Estimated per Capita Convenience Expenditure in Catchment Area			
Year	Population	Per Capita Expenditure	Estimated Expenditure (€m)
2011	25,403	€3,876	€98,462,028
2022	28,697	€4,239	€121,646,583
2023	29,016	€4,272	€123,956,352
2024	<b>29,335</b>	<b>€4,305</b>	<b>€126,287,175</b>

Table 3: Projected Estimated Per Capita Expenditure for Convenience Goods within Catchment Area

As outlined in Section 4.4, the 2014 CDP states that the day-to-day shopping needs of workforce populations will be taken into consideration in assessing the appropriate scale for future retail developments. While the workforce population has not been factored in to the figures in this RIA, locating convenience and comparison retailing in areas of large workforce populations is sustainable in terms of reducing travel patterns and also has the potential to help attract more employers into an area - as amenities and facilities for employees is a key consideration in the locational choice for new and developing businesses, in particular for larger scale multi-national companies.

The data in this RIA, has been projected to determine an estimated per capita convenience expenditure for 2024 based on the percentage growth between the years 2011 and 2022. Therefore, the estimated convenience expenditure for the catchment area in 2024 is **€126,287,175**.

In addition, the increase of online shopping has occurred in the last two years due to the COVID 19 pandemic, where retail stores have increased accessibility to their goods through online access/delivery. Therefore, the CSO notes that in January 2020, online shopping for food and drink encompassed 6% of internet users. Given the current circumstances, we can assume that this rate will either stay the same or increase to about 8% in 2024 for comparison retail. However, for the purpose of this RIA, the internet usage for convenience retail figures is assumed at 0% due to the assumption

that on-line convenience retail will be delivered from local shops (i.e. it is already accounted for in the turnover of these shops).

The same calculations can be applied to these figures in order to calculate the estimated per Capita Comparison Expenditure in the catchment area. It returns an estimated available residential expenditure figure of €92.4 million for convenience in 2011, rising to €140.5 million in 2024 for comparison goods.

Estimated per Capita Comparison Expenditure in Catchment Area			
Year	Population	Per Capita Expenditure	Estimated Expenditure (€m)
2011	25,403	€3,641	€92,492,323
2022	28,697	€4,614	€132,407,958
2023	29,016	€4,702	€136,433,232
2024	<b>29,335</b>	<b>€4,790</b>	<b>€140,514,650</b>

Table 4: Projected Estimated Per Capita Expenditure for Comparison Goods within Catchment Area.

Data has been projected to determine an estimated per capita comparison expenditure for 2024 based on the percentage growth between the years 2011 and 2022. Therefore, the estimated per capita comparison expenditure for 2024 is **€140,514,650**. with a total residual comparison retail expenditure of **€126,287,175** when online shopping is considered.

## 4.2 Assessment of Retail Turnover of Existing Outlets

In terms of turnover the MCJRS states that smaller units have substantially lower turnover per square metre than larger supermarkets which have substantially higher turnover rates per square metre, and this should be factored into retail impact assessments. However, the current MCJRS does not specify the turnover that smaller retail units should have. In order to establish an appropriate turnover for smaller convenience retail units, the sales densities in the previous Cork Strategic Retail Study for the City suburbs were considered to be €8,000/m<sup>2</sup> and €5,000/m<sup>2</sup> in outer metropolitan centres. According to the Metropolitan Cork Joint Retail Strategy 2013 (MCJRS), Carrigaline has and existing **6,881sqm** convenience floorspace and **5,352sqm comparison** retail floor space (as of 2013).

Location	Convenience	Comparison	Retail Warehousing / Bulky Goods
Cork City Centre	16,201	88,407	6,860
Mahon District Centre & Retail Park	2,969	16,808	13,384
Blackpool DC & Retail Park	4,011	11,198	3,408
Wilton DC	4,022	7,272	0
Ballyvolane DC	4,001	2,011	924
Douglas DC	8,274	11,694	2,141
Cork City Suburban Neighbourhood Centres	16,893	5,477	0
Cork City & Suburbs Retail Warehouse Floorspace	0	79	44,506
Cork City Local Centres	4,471	1,333	1,013
Residual Floorspace within Cork City Administrative boundary	5,686	3,154	1,495
Passage West and Monkstown	1,399	145	0
Blarney	954	3,452	764
Glanmire	2,707	813	175
Carrigtwohill	1,962	1,678	5,029
Carrigaline	6,881	5,352	6,154
Midleton	8,529	9,423	7,407
Cobh	5,408	3,248	1,533
Ballincollig	9,728	11,445	2,784
Little Island	1,167	162	8,917
Other Rural	3,729	824	3,783
<b>Total</b>	<b>108,992</b>	<b>183,975</b>	<b>110,277</b>

Figure 8: Existing retail Floorspace as noted by the MCJRS (Table 1)

The MCJRS notes the floorspace potential within the Metropolitan Area from 2011 to 2022 as noted below:

Table 3: Floorspace Potential		
	2011	2022
Convenience	3,557	43,173
Comparison	4,629	104,439
Bulky Goods / Retail Warehousing	0	57,555

Figure 9: Floorspace Potential as Indicated in the MCJRS

When considering the existing floorspace utilised from other sources, including recently proposed schemes, the total retail convenience floorspace will comprise 8,532sqm as shown in the table below. The floorspace figures have been identified through past planning permissions under Ref. No. 21/5966 (Lidl) and Ref. No. 21/7464 (Aldi).

Existing Stores	Estimate Net Convenience Retail Floorspace (m2)
<b>Reconstructed Lidl Store (Ref. No. 21/5966)</b>	336*
<b>Aldi (Ref. No. 21/7464)</b>	1,315
<b>Existing</b>	6,881
<b>Total</b>	<b>8,532</b>

Table 5: Estimate Net Convenience Retail Floorspace for Existing Stores in the Catchment area.

\*This figure has been determined based on the FI application under planning Ref. No. 21/5966. Due to the reconstruction of the existing Lidl store, the net retail floorspace increases from 1,334 sqm to 1,670 sqm. Therefore, the difference of 336 sqm is *not* included within the existing floorspace of 6,881 as noted in the MCJRS 2013.

\*\* It is important to note that SuperValue was granted planning permission in 2019 for the construction of a café space under Ref. No. 19/4698. This has not been included in the figures as the permission is not classified as convenience retail.

For comparison goods, the Lidl Replacement Store has been removed from the figures due to the retail type not being classified as a comparison retail but rather a convenience retail type. It is important to note that this figure is based on the overall net floor space for the store entirety that was gathered from previous planning applications under Ref. No. 21/5966 (Lidl), and Ref. No. 21/7464 (Aldi) as they are not included in the 6,881 existing floorspace figure as stated in the MCJRS. Works that have occurred in the Carrigaline Shopping Centre have remained internal or replaced where the Gross Floor Area Therefore, this calculation is under the assumption that all of Dunnes Stores has the comparison retail type.

Existing Stores	Estimate Net Comparison Retail Floorspace (m2)
<b>Existing</b>	5,352
<b>Total</b>	<b>5,352</b>

Table 6: Estimate Net Comparison Retail Floorspace for existing stores in the catchment area.

### 4.3 Retail Density

According to the MCJRS, the sales density of €11,000 per m2 is allocated to larger convenience retail stores. When compared to existing retail units in Carrigaline, mixed convenience/comparison retail stores such as Dunnes, uses €11,000 per m2, as well as strictly convenience retail stores including Collin's SuperValue. For the proposed Lidl store to the east of the town

centre, the MCJRS allocates a sales density of €9,500 per m<sup>2</sup>. For local shops located in the town centre, the MCJRS uses an average of €5,000 per m<sup>2</sup>.

For the purpose of comparison figures, the standard sales density for Metropolitan Centres, such as Carrigaline is €7,000 as outlined in the MCJRS.

For mixed convenience/comparison stores, it is important to note that according to the Guidelines for Planning Authorities: Retail Planning, state that mixed comparison/convenience retailing stores have no cap on the amount of non-grocery or comparison space delineated for the relevant store.

#### 4.4 Estimation of Turnover of Existing Retail

The MCJRS states that smaller retail units have substantially lower turnover per square metre than larger supermarkets, however this reduced turnover is not quantified in the MCJRS. In order to establish an appropriate turnover for larger convenience retail units, the sales densities in the previous Cork Strategic Retail Study for the City suburbs and other similar retail assessments for similar sized convenience units were considered. The sales density for this calculation is €11,000 in order to account for the maximum density possible within the threshold for convenience retail.

Using the estimated figures above, the Existing Retail Floorspace and Turnover of existing stores in the Catchment are as follows:

Existing Stores	Estimated Existing Net (m <sup>2</sup> )	Sales Density	Estimated Turnover 2024
<b>Lidl</b>	336	€11,000	€3,696,000
<b>Aldi</b>	1,315	€11,000	€14,465,000
<b>Other existing stores in the catchment</b>	6,881	€11,000	€75,691,000
<b>Potential Leakage/ Surplus Spend</b>	-	-	€32,435,175
<b>TOTAL</b>			<b>€126,287,175</b>

Table 7: Estimated net and turnover for existing convenience stores in catchment area.

\*Internet sales is not applied to convenience retail due to the assumption that online convenience retail is delivered from local stores.

A sales density of €11,000 has been applied to the net convenience retail floorspace. This sales density is consistent with the turnover/sales density provided for in a recent retail impact assessment for a similar size

convenience retail store in Carrigaline, which was permitted by the Council under Ref. 21/7464.

A sales density of €7,000 has been applied to the net comparison retail floorspace shown below.

Existing Stores	Estimated Existing Net (m2)	Sales Density	Estimated Turnover 2024
<b>Existing stores in the catchment</b>	5,352	€7,000	€37,464,000
<b>Internet (8%)</b>	-		€11,241,172
<b>Potential Leakage/Surplus Spend</b>	-	-	€91,809,478
<b>TOTAL</b>			<b>€140,514,650</b>

Table 8: Estimated net and turnover for existing comparison stores in catchment area.

It is important to note that Carrigaline currently does not have significant comparison retail in the town centre. Therefore, most residents will likely travel elsewhere for comparison shopping which results in a high leakage of comparison retail expenditure from the catchment area.

In order to identify if there is expenditure space in the catchment area for new developments, an estimated market share must be calculated for convenience and comparison retail. This will be based off of existing retail figures in the catchment area. The Projected 2024 market share and sales density for existing convenience stores in the catchment area is as follows:

Store	2024 Turnover (€)	2024 Market Share	Sales Density
<b>Lidl</b>	€3,696,000	2.9%	€11,000
<b>Aldi</b>	€14,465,000	11.4%	€11,000
<b>Other stores in the catchment</b>	€75,691,000	59.9%	€11,000
<b>Potential Leakage/Surplus spend</b>	€32,435,175	25.6%	
<b>TOTAL</b>	<b>€126,287,175</b>	<b>100%</b>	

Table 9: Projected 2024 market share and sales density for existing convenience stores in the catchment area.

The Projected 2024 market share and sales density for existing comparison stores in the catchment area is as follows:



Store	2024 Turnover (€)	2024 Market Share	Sales Density
Other stores in the catchment	€37,464,000	26.6%	€5,000
Internet (8%)	€11,241,172	8%	-
Potential Leakage/Overspend	€91,809,478	65.3%	-
<b>TOTAL</b>	<b>€140,514,650</b>	<b>100%</b>	

Table 10: Estimated market share for comparison retail in the catchment area.

A surplus in expenditure in a catchment area results in either expenditure leakage or overtrading of existing stores. In this case, the total 2024 Turnover including the proposed retail units will further increase to **€126,287,175**, for convenience retail and **€140,514,650** for comparison retail.

Based on the scale of the existing convenience retail stores, it is anticipated that weekly shopping trips are done outside the catchment area, most likely at medium to large convenience retail stores.

It is considered that the surplus expenditure in the catchment area results in some overtrading of existing stores, however given the lack of a medium scale convenience retailer within the catchment, it is likely that there is leakage of retail spend to other retail centres as there is a weaker comparison retail market in Carrigaline - the nearest option is either Douglas, Mahon or Cork City which is within approximately 11 km from Carrigaline.

When analysing the total projected expenditure for 2024, it is clear that there is capacity for both comparison and convenience retail in the town.

## 4.5 Retail Impact Assessment

This section considers the likely retail impact of the development on the existing retail provision. The assessment is based on the target year of 2024, when it is anticipated that the proposed development will be completed and operational. Quantitative need arises when growth in retail spending in an area is sufficient to support the provision of new retail floor space or where there are structural inadequacies in the existing shopping facilities such as, a significant level of over trading or leakage of spending to other centres.

When analysing the total projected expenditure for 2024, it is clear that there is capacity for both comparison and convenience retail in the town. Applying a sales density of €11,000 per m<sup>2</sup> for convenience retail and €7,000 per m<sup>2</sup> for comparison retail to the 2024 retail spend figures in the area, would indicate a capacity for a further 2,948sq m of convenience retail floorspace (i.e. €32,435,175/€11,000sqm) and 20,073 sqm of comparison floorspace (i.e. €140,514,650/€7,000sqm).

The proposed retail section of the development encompasses a total of 3,158 sqm of retail space, which is just 12% of the entire proposed development. Within the retail floorspace, 2210.6 sqm (70%) is allocated to convenience retail and 947.4 sqm (30%) is allocated to comparison retail floorspace.

When the proposed retail units are included in the previous assessments, it reveals that the floorspace allocated for convenience and comparison retail are within the threshold of available floorspace within the catchment area.

The estimated turnover for the proposed development has been calculated below. These calculations are based on the average expenditure for convenience (€11,000) and comparison (€7,000). The retail unit will produce **€22,264,000** in convenience spend and approximately **€6,631,800** from comparison spend. Therefore, in total, the proposed retail scheme is projected to provide **€28,895,800** in turnover.

	Floorspace (m2)	Estimated Turnover
<b>Convenience</b>	2,024	€22,264,000
<b>Comparison</b>	947.4	€6,631,800
<b>TOTAL</b>	3,158	€28,895,800

Table 11: Estimated turnover for convenience and comparison retail space generated by the proposed retail units.

When analysing the total projected expenditure for 2024 against the projected turnover for the retail store, it is clear that there is capacity for both comparison and convenience retail in the town.

## 4.6 Trade Diversion

In order to complete the retail impact assessment for a proposed development it is necessary to consider the impact on existing shops and where the trade projected for the new retail outlet will originate from. The RPG'S are explicit in their requirement to consider the impact on existing retail outlets.

The current convenience retail stores within the catchment area have an estimated combined turnover of €94 million per annum. Given the relatively modest amount of existing convenience floorspace, it is likely that the existing stores are overtrading and/or significant surplus expenditure is leaving the Catchment area.

Estimated Surplus Convenience Expenditure with the Catchment			
Store	2024 Turnover Before development	Pre-Development Surplus Expenditure (€m)	Post Development Surplus Expenditure (€m)
Lidl	€3,696,000	-	€3,696,000
Aldi	€14,465,000		€14,465,000
Other Convenience Stores in the Catchment	€75,691,000	-	€75,691,000
Surplus Expenditure/Leakage	€32,435,175	€32,435,175	€6,575,375 (i.e. €32,435,175 - €22,264,000)
Proposed Development	0	+€22,264,000	€22,264,000

Table 12: Estimated Surplus Convenience Expenditure including before and after the implementation of the proposed development.

As can be seen from the above Table, even with the proposed scheme in place there is surplus convenience expenditure in place including before and after the implementation of the proposed development.

The estimated surplus comparison expenditure both before and after the implementation of the proposed development is even more significant i.e. €91,809,478 before the scheme is complete and €85,177,678 after the scheme is complete (i.e. €91,809,478 - €6,631,800).

It is considered that there will not be significant trade diversion from the existing convenience stores within in the catchment and that the trade diversion will primarily be from shops outside the catchment (i.e. a reduction in leakage expenditure from the catchment) with minimal impact on existing stores within the catchment. When the proposed development is considered, calculations reveal that the new retail scheme will account for a significant reclaim of the convenience leakage spend outside of the catchment area.

## 5. Site Suitability

The RPG'S state that the preferred location for retail development is within existing town and neighbourhood centres and then at the edge of existing centres and that a sequential test be applied to out of town centre / edge of centre to identify appropriate sites.

The Department of Heritage Environment and Local Government's (DoEHLG's) Retail Planning Guidelines (RPG's) for Planning Authorities identifies the following key criteria which need to be assessed when determining the suitability of a retail development: Compliance with Planning Policy; Viability / Size; Location; Accessibility; Serviceability; and Availability. Each of these criteria are assessed below.

Based on the DoEHLG's criteria, the site has the following qualities and potential to accommodate a proposed convenience and comparison retail use:

**Compliance with Planning Policy:** The proposed retail floorspace is located within a designated town centre in the MCJRS and on a site zoned "Town Centre" in the LAP and 2022 CDP. The proposed unit will provide for the day-to-day shopping needs of the residential and significant workforce population of Carrigaline in accordance with the objectives of the 2014 CDP and 2022 CDP;

**Viability / Size:** The proposed location is within an established retail area and designated town centre. The proposed retail unit is modest in size and has been designed to cater for both the residential and proportion of the workforce population;

**Location:** The site is situated within a designated town centre and is within very easy walking distance of a large residential and employment population;

**Accessibility:** The site has very good access by a number of modes of transport, including vehicular access, as well as pedestrian and cyclist access and is served by high frequency bus services. The access is expected to increase once the western relief road is complete in the coming months.

**Availability:** The site is immediately accessible and available for development.

The site therefore satisfies all of the suitability criteria outlined in the DoEHLG Retail Planning Guidelines. A review of Carrigaline's zoning and the planning history indicates that this site is the preferred location for the development of a medium size retail store due to its zoning and location within the town centre.

## 6. Conclusion

The proposed retail store will greatly improve the existing convenience and comparison offer available to both the residential and workforce populations which is currently under-provided in Carrigaline. The assessment of new retail floor space in Cork must be considered in terms of the most recent Metropolitan Cork Joint Strategic Retail Study and retail strategy adopted by the Council in the 2014 CDP.

In summary, the following points are key to the assessment of the need for the proposed retail units:

- The RPG'S state that the preferred location for retail development is within existing town and neighbourhood centres;
- The proposed convenience store meets all of the criteria identified in the DoEHLG's, Retail Planning Guidelines (RPG's) in terms of compliance with Planning Policy; Viability / Size; Location; Accessibility; Serviceability; and Availability;
- In the MCJRS and 2014 and 2022 CDP's, Carrigaline is listed as a "Metropolitan Town" where it is an objective to provide appropriate convenience retail and retail service requirements;
- Given Carrigaline's status as a Metropolitan Town within the retail hierarchy for Metropolitan Cork, leakage of retail spend to other centres is not desirable;
- The MCJRS/CDP identifies an additional convenience retail floorspace of 22,882 net square metres for the 'Rest of Metropolitan', which is to be distributed according to current and future population levels and expenditure patterns;
- The proposed development falls within the net floorspace area requirement as identified in the MCJRS;
- With the proposed scheme in place there is still surplus convenience and comparison expenditure in the catchment area;
- The proposed retail units will redress the loss of retail spend to other retail locations in the area;
- Based on the anticipated population and expenditure growth, there is no anticipated impact on the existing convenience retail stores within the catchment area. Rather, the provision of this store will strengthen local trading by reducing significant leakage patterns, underpinning the vitality and viability of the defined town centre area.