
Metropolitan Cork Joint Retail Strategy

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Cork City Council
Comhairle Cathrach Chorcaí



Cork County Council
Comhairle Contae Chorcaí

1.0 Introduction

1.1 The Retail Planning Guidelines (RPG's) for Planning Authorities (2012), issued by the Department of the Environment, Community and Local Government, require Local Authorities to prepare retail strategies and policies for their areas and to incorporate these where appropriate into their development plan. The guidelines note that certain development plans and local area plans must be informed by joint or multi authority retail strategies which should assess retail activity and demand needs that transcend planning authority boundaries. The guidelines specifically identify that Cork City and County Councils should prepare a joint retail strategy.

1.2 John Spain Associates were commissioned in August 2012 by Cork City Council and Cork County Council to prepare a joint retail study for Metropolitan Cork. The strategy set out within this document is based upon the findings of the retail study which replace the existing 2008 Cork Strategic Retail Study. The Metropolitan Cork Joint Retail Study is available online at www.corkcity.ie and www.corkcoco.ie. This joint retail strategy for the planning authorities in the City and County has been incorporated into their respective Development Plans. The strategy formed the agreed basis on which each authority formulated appropriate development plan objectives or policies for retail development in its areas and will be used in the determination of applications for planning permission.

The central objectives of the Joint Retail Strategy is to identify

- the broad (sq.m.) requirement for additional retail floorspace development over the plan period in the overall area to support the settlement hierarchy;
- the retail floorspace requirements both quantity and type by constituent planning authorities; and
- broad guidance as to the location and function of retail activity and the relevant settlement hierarchy;

2.0 Existing Retail Trends within the Metropolitan Area

2.1 The Joint Retail Strategy has regard to the current economic context and its implications on the Metropolitan Area. The onset of the economic recession in late 2007 has led to a very significant slowdown in the physical development of the retail sector in the country. The effect of the economic conditions on retailers is evident in the increase in the presence of vacant units and derelict sites in town centre locations.

2.2 The changing economic context has required, and will continue to require, innovation in the development of the retail sector. The potential for large scale mixed use and town centre schemes has been reduced, due to lack of available funding in general and the contraction of the retail sector. However, some retailing sectors have remained relatively strong, notably the discount foodstore sector. Some comparison high street retailers also continue to expand and invest in Ireland.

2.3 The convenience sector by its nature continues to attract a demand and continues to be developed as a result, albeit at a slower rate. Increased competition from discount retailers, the continued domination of the market by a small number of large retail providers, and the requirement for larger floorplates are some of the key trends in the convenience sector.

- 2.4 The comparison sector has suffered a decline, as has the demand for retail warehousing, and both these sectors in particular will require innovation and investment to ensure that key centres retain their attraction.
- 2.5 The retail study highlights that one of the residual effects of the recession has been the number of extant permissions for ambitious developments, often including significant retail provision. Similarly, the study identifies high levels of vacant floorspace in some centres within the Metropolitan Area. The extent of unimplemented or “pipeline” permissions and vacant floorspace are identified as key considerations in the joint retail study.

Policy 1: Role of the Joint Retail Strategy

To include the Metropolitan Cork Joint Retail Strategy in future development plans together with appropriate objectives that will secure its implementation.

3.0 Existing Retail Floorspace within the Metropolitan Area

- 3.1 A detailed floorspace survey was undertaken within the Joint Retail Study to identify the extent of convenience, comparison and retail warehouse/bulky goods floorspace within the Metropolitan Area. The distribution of this floorspace is detailed in Table 1 below. In October 2012 there was a total of 403,244sq.m. net occupied retail floorspace within the Metropolitan Area, 27% convenience, 46% comparison and 27% retail warehousing / bulky goods.

Table 1. Existing Retail Floorspace (sq.m.net)

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
Total	108,992	183,975	110,277

3.2 The performance of existing retail floorspace in the Metropolitan Area is assessed within the survey and analysis section of the Retail Study. The household survey undertaken to inform the retail study identifies that the Metropolitan Area retains a significant proportion of comparison expenditure with 98% of all respondents who live within the Metropolitan Area carrying out their main comparison shopping within this area. Significant inflows of comparison expenditure into the Metropolitan Area are also observed from the remainder of County Cork and the adjoining Counties.

3.3 Cork City Centre acts as the main comparison centre within the Metropolitan Area. This is reflected by the fact that 48% of all comparison floorspace within the Metropolitan Area is located within the City Centre. In accordance with its designation as a gateway, Cork City Centre acts as the primary location for comparison shopping within the catchment area with a market share of 59.8% within the Metropolitan Area. The second most popular location for comparison shopping in the Metropolitan Area is Mahon Point Shopping Centre which attains a comparison expenditure market share of 15.7%.

4.0 Retail Hierarchy

4.1 Central to the retail strategy is the retail hierarchy which will form the basis for determining the quantum and location of new retail development. This distribution of the identified retail floorspace potential within the Metropolitan Area reflects the existing and future target population in the Metropolitan Area having regard to existing vacancies, pipeline permissions and the proposed retail hierarchy. The retail hierarchy for the Metropolitan Area is identified in Table 2 below.

Table 2: Retail Hierarchy					
Level	Centre	Retail Hierarchy			
Level 1	Metropolitan	Cork City Centre			
Level 2	Large Metropolitan Towns	Ballincollig, Carrigaline, Cobh and Midleton	Level 2	District Centres	Blackpool, Douglas, Wilton, Mahon Point, Ballyvolane*, Cork Docklands**, Hollyhill***
Level 3	Small Metropolitan Towns	Carrigtwohill****, Glanmire, Passage West, Blarney, Monard*****			
Level 4	Neighbourhood Centres and Large Village Centres	Bishopstown, Bishopstown Court, Blackpool Village, Hollyhill, Tory Top Road/Curragh Road, Blackrock Hall (Ballinaure), Togher / Clashduv Road, Mount Agnes Road, Avenue de Rennes, Skehard Road, Mayfield, The Lough, Jacobs Island, 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				

**Ballyvolane: Ballyvolane is identified as a district centre to serve the northern suburbs of Cork City in accordance with the current City Development Plan and the land use zoning contained in the Blarney Electoral Area Local Area Plan. It is envisaged that the future expansion of retail floorspace in this area will be subject to a co-ordinated approach between Cork City Council and Cork County Council.*

***Cork Docklands: The future development of Cork Docklands District Centre and Neighbourhood Centres is to be in tandem with the planned population growth and development of this area.*

****Hollyhill currently operates as a neighbourhood centre. It is considered that it has the potential to develop to a district centre primarily based on convenience retailing and services.*

*****Carrigtwohill is a small Metropolitan Town but has been planned to develop to a large Metropolitan Town over the medium to long term due to its location on the Cork to Midleton Rail line.*

****** Monard: Retailing will be provided at an appropriate level to serve this planned new settlement as it develops.*

Level 1 Metropolitan – Cork City Centre

4.2 Cork City Centre is the principal urban centre in the county and region and forms the first tier within the retail hierarchy. The City Centre exhibits a number of higher order retail, service and specialist functions not found elsewhere in the County and Region and acts as the focus for comparison retail development. The City Centre currently supports 111,414 sq.m. of net retail floorspace of which 88,407 sq.m. (79%) is for comparison goods.

4.3 The City Centre acts as the main location for higher order comparison goods within the Cork Metropolitan Area. The Joint Retail Study, in line with national guidance recommends that the City Centre should be the prime focus for future development and in particular the development of high order comparison retail floorspace.

Policy 2: Cork City Centre

To recognise Cork City Centre as the primary retail centre, particularly for higher order comparison goods, and to promote and enhance Cork City Centre in order to sustain its competitiveness in line with its designation as a 'Gateway' City within the National Spatial Strategy.

Level 2: District Centres and Large Metropolitan Towns

4.4 The second tier consists of the existing and planned district centres in the Metropolitan area of Blackpool, Douglas, Mahon Point, Wilton, Ballyvolane, Hollyhill and Cork Docklands and the Large Metropolitan Towns of Ballincollig, Carrigaline, Midleton and Cobh.

District Centres

4.5 There are currently four district centres in the Cork Suburbs, namely, Blackpool, Wilton, Douglas and Mahon. The existing district centres are generally characterised by a large convenience / comparison anchor, a range of comparison outlets, local retail services, ancillary specialist convenience outlets, community and social facilities. Most of these centres serve a localised catchment and are primarily designed to serve weekly shopping needs. The exception to this is Mahon District Centre which has a wider and higher order range of comparison floorspace and an adjacent retail warehouse park, and performs a different role and function to the other district centres within the Metropolitan Area.

4.6 In addition to the existing centres, the strategy supports the future upgrading of the existing neighbourhood centres at Ballyvolane and Hollyhill to District Centres. Planned expansion of population in Ballyvolane will require expansion of retail provision there, while there is also scope for expansion of Hollyhill to meet existing and future needs. The strategy also identifies the need for a district centre in the South Docklands to be developed in tandem with future population growth and development. It is the intention of the strategy that the District Centres should evolve into mixed use urban centres with enhanced public transport

accessibility. District centres would benefit from a greater range of retail services, community and social facilities in order to meet the day to day needs of their local catchment. Generally, as outlined in the Retail Planning Guidelines 2012, District Centres should contain lower order comparison retail.

Policy 3: Suburban District Centres

To support the vitality and viability of District Centres 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, in order to protect the primacy of Cork City Centre.

Level 2 Large Metropolitan Towns

- 4.7 The Large Metropolitan Towns of Ballincollig, Carrigaline, Cobh and Midleton perform 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. Retail expansion in these settlements / centres should be in line with the respective planned population increases and should focus on the consolidation of existing retail cores.

Policy 4: Large Metropolitan Town Centres

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.

Level 3: Small Metropolitan Towns

- 4.8 The small metropolitan towns of Glanmire, Passage West, Blarney and Carrigtwohill, generally have a more limited retail role and function than those towns in the second tier. Retail representation is often limited to local convenience and service provision, with limited comparison offer. Future development should be encouraged to locate within the identified core retail areas of these settlements in order to strengthen and consolidate the retail role and function of these centres. Retail development should be in accordance with the planned population growth of these centres.

Policy 5: Small Metropolitan Towns

To strengthen and consolidate the retail role and function of these towns and to provide retail development in accordance with their planned population growth to serve their local catchments.

Level 4: Neighbourhood Centres and Large Village Centres

- 4.9 Neighbourhood centres and larger villages provide important top up and day to day shopping and retail service requirements. They are typically characterised by an appropriately scaled convenience offer and ancillary retail services and serve a small localised catchment population.

Policy 6: Neighbourhood Centres and Large Village Centres

To support, promote and protect Neighbourhood Centres and Large Village Centres which play an important role in the local shopping role for residents and provide a range of

essential day to day services and facilities. The opportunity for development of new neighbourhood centres will be identified in Development Plans or Local Area Plans as appropriate including where significant additional population growth is planned or where gaps in existing provision are identified.

Level 5: Local Centres, Corner Shops and Small Villages

- 4.10 Small local centres, corner shops and rural shops provide a valuable local and walk in role and function to the local communities that they serve. Local centres should be supported and protected through the sensitive management and expansion of larger retail centres.

Policy 7: Village and Local Retail Facilities

To support, promote and protect local centres, villages and corner shops which provide an important retail service at a local level.

5.0 Identification of Core Retail Areas and Opportunity Sites

- 5.1 In accordance with the Retail Planning Guidelines, the Joint Retail Study identifies Core Retail Areas for the first and second tier centres within the Metropolitan Area Retail Hierarchy. As far as possible, new development will be sited within these core retail areas and will be assessed in accordance with the criteria set out in the Retail Planning Guidelines and the relevant Development Plan or Local Area Plan policies.

- 5.2 The Retail Study also identifies a number of Opportunity Sites in many of the towns and the city centre which are considered to be suitable locations for retail development. In accordance with the objectives of the Retail Planning Guidelines new retail development should be located within or close to these identified core retail areas, where possible.

Policy 8: Core Retail Areas

To support the development of the identified Core Retail Areas as the preferred location for new retail development through the appropriate development of identified opportunity sites and through the application of the sequential test.

6.0 The Need for Additional Retail Floorspace

- 6.1 One of the key requirements of the *Retail Planning Guidelines* is that retail strategies should provide a broad assessment of the additional retail floorspace required over the lifetime of their strategies.

- 6.2 The requirement for additional retail floorspace within the Metropolitan Area is estimated having regard to the population targets, expenditure trends, the quantum of existing retail floorspace, existing vacancy levels, extant planning permissions and the findings of the 2012 household and shopper surveys. Based on the above estimates, Table 3 summarises the requirement for additional retail floorspace within the Metropolitan Area by 2022.

- 6.3 It is an objective of the Joint Retail Strategy to significantly reduce retail vacancy levels in the short term by 50%, half of which should be occupied by retail uses and the remainder occupied by non-retail uses including retail services. Of this 25% retail vacancy figure it is assumed that 2/3's of this floorspace (7,364 sq.m.) will be occupied by comparison floorspace and the remaining 1/3 (3,682 sq.m.) will be occupied by convenience floorspace. Reconfiguration of existing vacant uses at appropriate locations to meet market demands for appropriate retail developments – either in terms of sub-division or merging of existing

units - and a balanced approach to proposed change of use of retail units to either retail services or non-retail uses can help achieve this objective. This objective has been taken into consideration in determining the potential for additional retail floorspace within the Metropolitan Area.

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

- 6.4 The figures set out in Table 3 do not include “pipeline” floorspace i.e. floorspace which has already been permitted in the Metropolitan Area but is not constructed at this time. In light of economic conditions it should be recognised that any implementation of such permissions may be on a reduced scale from that originally approved, and / or on a phased basis. However, it will be important that both “vacancies” and “commitments” are considered on a case-by-case basis when considering future applications for significant retail floorspace. Given the potential to extend the duration of permissions, existing commitments (the pipeline) have added weight and importance when assessing new applications. Furthermore, the nature and commercial viability of pipeline floorspace should be considered when assessing applications for significant retail developments, having regard to the role and function of the respective centre.

Policy 9: Reduction of Vacant Floorspace

Aim to reduce the amount of vacant floorspace within Core Retail Areas by 50% in the short term, half of which should be occupied by retail use and the remainder by non-retail uses or retail services.

7.0 Distribution of Retail Floorspace

- 7.1 The retail hierarchy determines the distribution of future floorspace and has regard to the settlement strategy set out in the Cork Area Strategic Plan. The Joint Retail Strategy sets out the following guidance for the distribution of future retail floorspace within the Metropolitan Area.

Distribution of Convenience Floorspace

- 7.2 The distribution of convenience floorspace figures throughout the Metropolitan Area is allocated in accordance with population growth, and the existing quantum of development currently provided within each centre and extant permissions.
- 7.3 The population targets set out within the Councils’ Core Strategies suggests that 47% of growth would be appropriate for the City Council area and adjoining Suburbs (Ballyvolane and Douglas) and the remaining 53% would be appropriately allocated to the rest of the Metropolitan Area. Table 4 below applies these population ratios to the total available floorspace figures.

Table 4: Convenience Floorspace Distribution					
Settlement	Existing Population (2011 Census)	Planned 2022 Population	Planned Population growth 2011-2022	Percentage Growth Allocation	Convenience Floorspace Allocation (net)
Cork City and Suburbs, (including Douglas and Ballyvolane)	151,054	186,125	35,071	47%	20,291sq.m.
Remainder of Metropolitan Area	138,685	177,766	39,081	53%	22,882sq.m.
Total	289,739	363,891	74,152		43,173sq.m.

- 7.4 Within the City and Suburbs the focus will be on improving the range and quality of convenience floorspace in sustainable locations and providing additional convenience floorspace to match planned populations expansions, such as that envisaged for Docklands and Ballyvolane. It is noted that the southern suburbs of the city are better served in terms of convenience provision than the northern suburbs. In this regard it will be an objective of the Council to promote further convenience development in the northern suburbs.
- 7.5 There is scope to enhance the existing convenience offer in the northwest suburbs of the City and to strengthen and reinforce the retail function and role of existing neighbourhood centres. In this context Hollyhill neighbourhood centre has the potential to develop to a district centre.
- 7.6 It is also envisaged that there will be a significant future requirement for convenience development in developing areas of the City, in particular Docklands. Extant permissions in Docklands includes 5,747sq.m. of convenience floorspace.
- 7.7 It is evident that some of the towns within the Metropolitan Area could improve their current convenience retail offer. Most towns will need to expand their level of retail floorspace provision in line with their population growth targets. Convenience development will be promoted in these urban centres in order to improve competition choice and diversity in the retail market.

Policy 10: Convenience Floorspace

To improve the quality of convenience retail floorspace throughout the Metropolitan area, in accordance with the retail hierarchy and settlement strategy. The provision for distribution of new convenience floorspace is outlined in Table 4.

Distribution of Comparison Floorspace

- 7.8 The preferred option for the distribution of comparison floorspace is illustrated in Table 5 below. This option distributes future floorspace based on a combination of existing market share and future population increase. The allocation to the city centre is set at 60.4%, maintaining its existing market share, in order to reflect its prominent role and function as the main location for comparison goods within the Metropolitan Area.

Cork City Centre	60.4%	63,081
Suburban Centres	23.9%	24,961
Rest of Metropolitan Area	15.7%	16,397

7.9 The allocation of retail floorspace outside of the City Centre will be based on the role of each centre within the retail hierarchy, population targets and current market share. New developments/permissions must be linked to population and economic growth. When considering the future allocation of floorspace, regard must be had to the extent of existing vacancy within the core areas of towns within the Metropolitan area as well as the extent of unimplemented permitted pipeline floorspace.

7.10 The Planning Authorities will take a cautious approach in permitting significant retail schemes within the district centres and the large metropolitan towns in order to protect the primacy of Cork City Centre within the hierarchy with regard to comparison retailing.

Policy 11: Comparison Floorspace

To improve the quality of comparison retail floorspace throughout the Metropolitan area, in accordance with the retail hierarchy and settlement strategy. The provision for distribution of new comparison floorspace is outlined in Table 5.

City Centre

7.12 The City Centre remains the primary location for comparison shopping reflecting its role as a designated Gateway City within the National Spatial Strategy. Sites which have extant permissions, particularly those at Grand Parade should be prioritised for redevelopment. When considering proposals in locations outside the city centre for comparison development, the potential implications for the regeneration of key opportunity sites in the city centre needs to be considered.

District Centres

7.13 Suburban district centres shall continue to provide a wide range of convenience floorspace as well as appropriate levels of lower order comparison floorspace in locations close to significant centres of population.

7.14 The provision of comparison floorspace in the city suburbs will be more evenly distributed by providing new floorspace (as indicated in table 7.3.2) at the ratio of 40/60 to the Northside /Southside respectively. No suburban centres should have a greater comparison floorspace than the current largest district centre (Mahon), which will not grow significantly over the period of the strategy. Future retail expansion within the Suburban District Centres will be carefully controlled so that they progressively develop as mixed use urban centres and that the planned development of Cork City Centre and the Metropolitan Towns can be successfully achieved.

Policy 12: District Centre comparison floorspace distribution.

To ensure an even distribution of comparison floorspace within the city suburbs, new floorspace shall be distributed around the district centres at a ratio of 40 : 60 to the Northside : Southside respectively. No District centres should have a greater amount of comparison floorspace than the current largest District centre (Mahon), which will not grow significantly over the period of the strategy.

Northside District Centres

- 7.15 Blackpool: Mixed-use development should be encouraged within Blackpool to include retail and non-retail uses. It is an objective to consolidate Blackpool and provide a much improved urban environment and a greater mix of uses. In Blackpool there is potential for comparison expansion to deliver improvements in urban design and linkages.
- 7.16 Ballyvolane: The future expansion of retail floorspace in Ballyvolane will be subject to a co-ordinated approach by Cork City Council and Cork County Council. Demand for additional comparison retail floorspace in Ballyvolane will be driven by the future population of the Ballyvolane Masterplan Area as per the Blarney Electoral Area Local Area Plan. The delivery of additional comparison floorspace in Ballyvolane must also be in tandem with a range of other ancillary retail services, community and social infrastructure in order to facilitate the development of Ballyvolane into a fully functioning district centre.
- 7.17 Hollyhill / North-West District Centre: The City Development Plan Core Strategy identifies the potential for an additional district centre in the north west of the City. Over the lifetime of the study Hollyhill has the potential to develop into a district centre, with a substantially improved convenience offer, a broad range of retail services, modest comparison provision as well as improved social and community infrastructure. The development of Hollyhill should be coupled with significant environmental improvements to the public realm and should facilitate the regeneration of this area.

Southside District Centres

- 7.18 Douglas: In recent years Douglas has reduced its comparison market share and has high levels of vacancy both within the core retail areas and adjoining areas. The priority for Douglas is to reduce the current levels of vacancy and to provide for a modest increase in comparison floorspace to help restore market share. Any redevelopment or expansion of Douglas must be coupled with improvements to the public realm in order to enhance the overall range and mix of uses in the centre. The centre would also benefit from improved linkages. The Douglas LUTS and Carrigaline Electoral Area LAP will provide the framework for the future development of the Douglas District Centre.
- 7.19 Wilton: The redevelopment of the district centre should be prioritised. The centre has potential to augment its comparison offer in order to reinforce its role and function and facilitate its regeneration. Mixed-use development should be encouraged within this centre to include retail and non-retail uses. Any redevelopment or expansion of Wilton must be in tandem with improvements to the public realm.
- 7.20 Mahon: No significant expansion of comparison floorspace in Mahon is envisaged over the lifetime of the strategy. In contrast with other district centres within the Metropolitan Area Mahon, performs a primarily comparison retail role. The objective for Mahon is to include a greater mix of non - retail uses in order to enhance its district centre function.

Docklands: Docklands is identified as a Key Development Area in the City Development Plan, an area targeted for significant redevelopment and regeneration. Comparison retail development of an appropriate scale, commensurate with the planned population growth will be encouraged.

Large Metropolitan Towns

- 7.21 The aim of the Metropolitan towns is to meet the retailing needs of their respective catchment population while reflecting their role and function within the retail hierarchy.
- 7.22 Midleton: Midleton has the most potential to accommodate additional comparison floorspace. The town serves a significant rural hinterland and existing comparison floorspace within the town is primarily characterised by independent retailers. The town also has a low market share for comparison goods when compared with its convenience goods market share.
- 7.23 Cobh: Cobh town centre has potential for additional floorspace including the tourism related market. There are significant vacancies in the town centre although it is recognised that this mostly comprises smaller units.
- 7.24 Carrigaline: Potential exists for expansion of comparison and convenience retail floorspace within Carrigaline.
- 7.25 Ballincollig: There is significant vacancy within the core retail area of Ballincollig with over 6,000 sq. metres as well as some significant pipeline developments, within the Ballincollig Town Centre and Old Quarter developments. In this regard, a cautious approach shall be taken to the development of further large scale comparison floorspace in the town pending the occupation of these vacant units.

Small Metropolitan Towns

- 7.26 The development of comparison retail floorspace within the small metropolitan towns will be limited over the period of the strategy to small scale and localised provision commensurate with the population targets for each centre.

Neighbourhood Centres and Villages

- 7.27 Neighbourhood Centres generally serve smaller, more localised communities and provide an important service at a local level. Comparison retail floorspace will be limited to small scale local provision.

Retail Warehousing / Bulky Goods

- 7.28 The quality and provision of retail warehousing / bulky goods facilities throughout the Metropolitan area varies considerably, from planned retail parks such as Mahon and Blackpool to ad-hoc retail warehouses within industrial zones such as the Tramore Road.
- 7.29 The capacity assessment of the retail study demonstrates that there is potential for additional retail warehouse development over the period of the strategy (57,555 sq.m. by 2022). The key consideration in determining the distribution of floorspace is the appropriate

and sustainable location for such retail activity. Proposals for large scale retail warehouse floorspace should be in accordance with Planning Guidelines on Spatial Planning and National Roads. In accordance with the Retail Planning Guidelines there should be a presumption against the further development of out of town retail parks and a preference for sites in or adjacent to the District Centres and the town centres of the Large Metropolitan Towns, to ensure the potential for linked trips and commercial synergy. Certain sites within City's Docklands may also be appropriate for such development.

- 7.30 It is important that the range of goods sold in retail parks is tightly controlled to protect the comparison shopping function of the city centre and other comparison locations identified in the hierarchy. The Retail Planning Guidelines acknowledge that there are ancillary items associated with an otherwise bulky good but recommend that the retail floorspace devoted to such ancillary products should not exceed 20% of the total net retail floorspace of the relevant retail warehouse unit.

Policy 13: Retail Warehousing / Bulky Goods

To improve the quality of retail warehouse / bulky goods floorspace throughout the Metropolitan area, in accordance with the retail hierarchy and settlement strategy. The preferred location for new retail warehousing/bulky goods floorspace is within or adjoining District Centres and town centres within Large Metropolitan Towns, as opposed to the development of out-of-town retail parks or locating within industrial estates / business parks.

8.0 Criteria for Assessing New Retail Developments

- 8.1 Retail Impact Assessments shall be prepared in accordance with the current Retail Planning Guidelines. The threshold at which a Retail impact Assessment may be required will be determined in the context of development plan policies but proposals for significant retail development would normally be expected to be supported by a full Retail Impact Assessment. In addition to the criteria set out within the Retail Planning Guidelines proposals for new retail development within the Metropolitan Area will demonstrate the following in Retail Impact Assessments.

- 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.

10.0 Monitoring and Review of the Retail Strategy

- 10.1 The Joint Retail Study advises that Retail trends should be monitored over the lifetime of a retail study and that retail policies should be updated to reflect these trends where appropriate. A monitoring system will be put in place by the City and County Authorities to ensure that any necessary adjustments in policy can be made. As most of the projected retail floorspace requirement is linked to population growth, monitoring will take account of progress towards achieving population targets and adjust the strategy if appropriate.