

# Cork City Employment & Land Use Survey 2011

Summary Report – March 2012



Cork City Council  
Comhairle Cathrach Chorcaí

Planning Policy Section  
Strategic Planning & Economic Development Directorate  
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## **1.0 Introduction**

Cork City Council has carried out an Employment and Land Use Survey across the City since the early 1970's. The information collected provides a basis for monitoring development and employment trends across the City. Survey work is generally conducted every five years to coincide with the Census of Population giving continuity and an opportunity for comparison between different surveys and further insight into changing economic trends for both the city as a whole and defined areas within it, such as the City Centre.

This report summarises the main findings of the 2011 survey in relation to employment trends and compares them with the previous survey from 2006.

## **2.0 The Survey**

The survey was conducted over a period of approximately 17 weeks from May to September 2011. Enumerators called to individual premises throughout the city and interviewed senior personnel regarding staff numbers and the nature of the employment activities carried out. This was also followed up by phone calls and / or letters if the personnel were not available or the premises were closed. Detailed land use information was also collected for the city centre and this will be analysed in a later report.

The survey achieved a 95% response rate which was similar to the response rate of the previous 2006 survey. Of the 6,226 employers surveyed there were a total of 321 non responses.

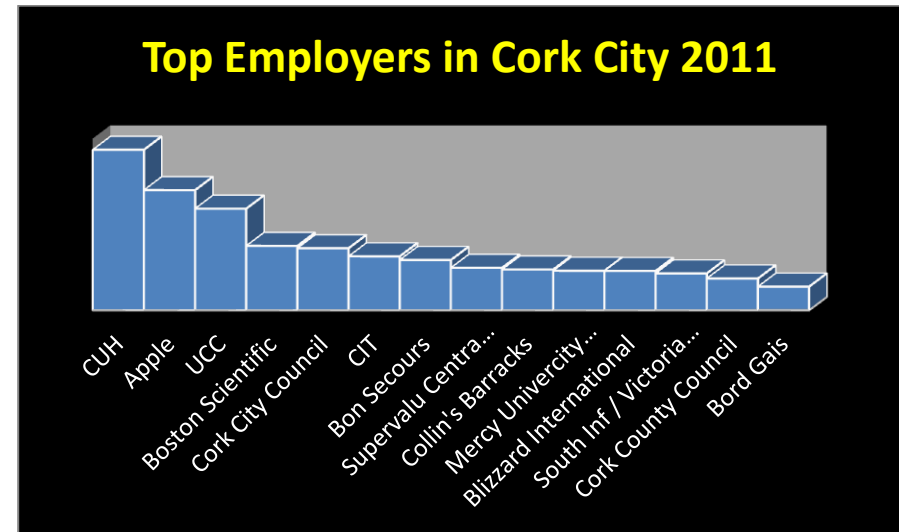
For the purpose of analysing the data, the City is divided into six sectors, City Centre, South East, South Centre, South West, North East and North West. These are based on groups of census wards as set out in Appendix A. Data for each sector in the city have been compiled to reveal a detailed picture of what is happening in different areas of the city.

The following report provides a brief outline of the changing employment trends throughout the city and employment activities based on data collected in the 2011 survey.

### 3.0 Largest Employers in Cork City

Fig. 2.0 below illustrates the top employers in Cork City in 2011, all employing 500+ employees. Although the top employers are similar to that of 2006, the rankings have changed. In 2006, the top five employers were all public sector which included CUH, UCC, Collin’s Barrack’s, Cork City Council and CIT. Apple Computers were the sixth largest employer in 2006 followed by Supervalu / Centra Distribution Ltd, Mercy Hospital, Bon Secours and Boston Scientific.

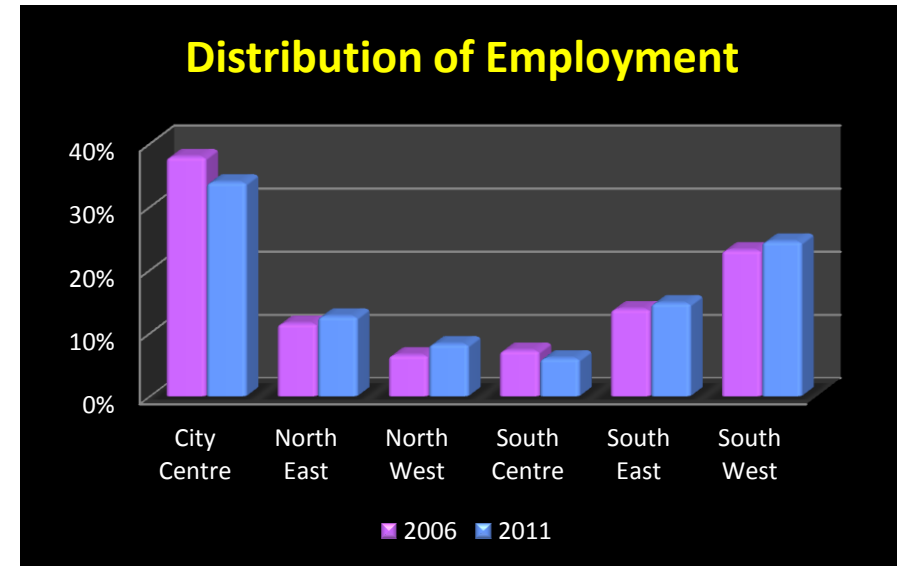
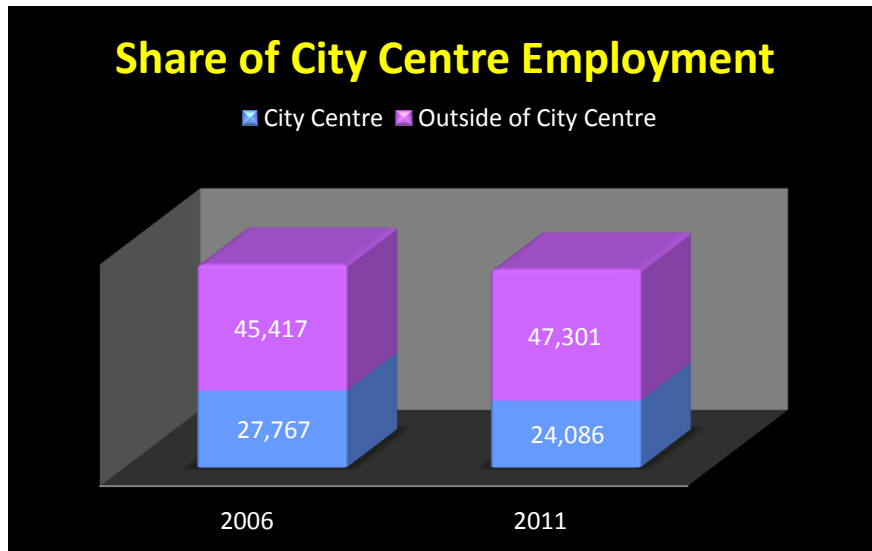
While CUH is still the largest employer in the City, Apple Operations Europe are now the second largest employer in Cork City while Boston Scientific have moved into fourth place. Gaming company Blizzard Entertainment which set up in Blackpool in 2007 is now one of the largest employers in Cork City.



**Fig. 2.0:** Largest Employers - **Note** Only employees based within Cork City boundary were included. E.g. Cork County Council only included employees based within the city boundary.

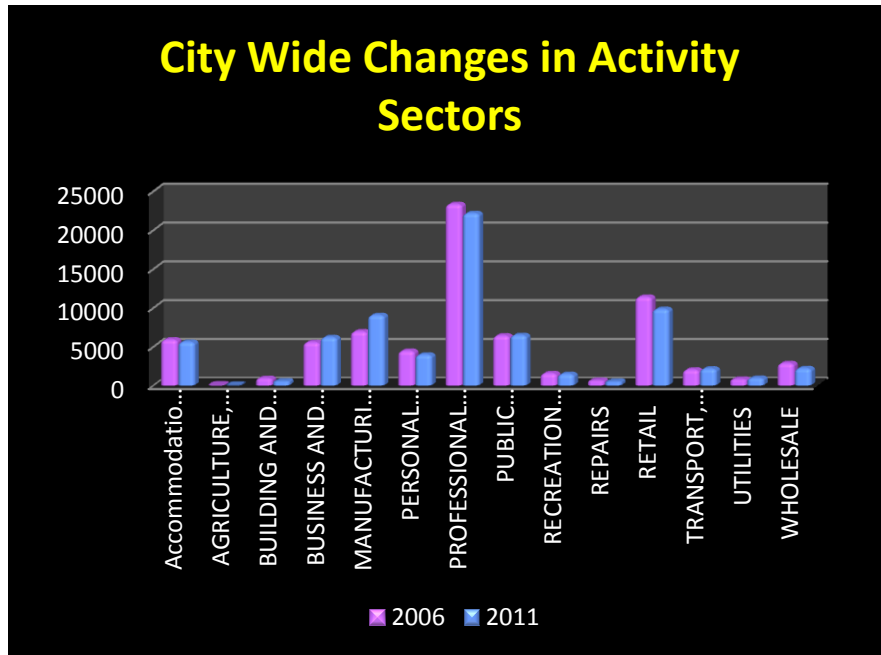
#### 4.0 Distribution of Employment in Cork City

Some significant changes have occurred in the share of total city employment in each geographic sector. In 2006, 38% of the overall city employment was contained within the City Centre sector. That figure has since dropped to 34%, dropping by over 3,500 jobs in the City Centre over a five year period. Construction of newer buildings in locations such as Mahon and Blackpool and other locations outside the city, offering medium to large floor plates which allow flexibility in terms of expansion and operational costs, the provision of on-site parking and perceived easier access as well as lower rates and rents, have proved attractive for certain types of existing as well as new businesses.



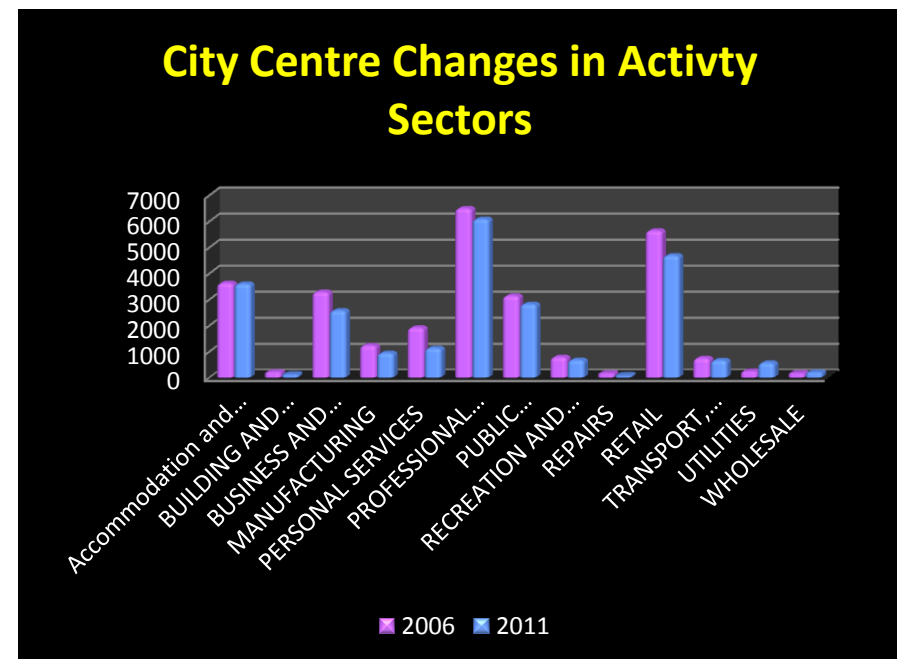
The bar-chart above compares the share of employment between the six sectors in Cork City for 2006 and 2011. The City Centre sector shows the most notable change, as outlined earlier, followed by the North East which increased by 2%. Part of this 2% increase was due to businesses relocating from City Centre to Blackpool area. The North West share also rose by 2%, due mainly to the increase in jobs at Apple. There was no significant change in the remaining three sectors.

### 5.0 Employment Activities



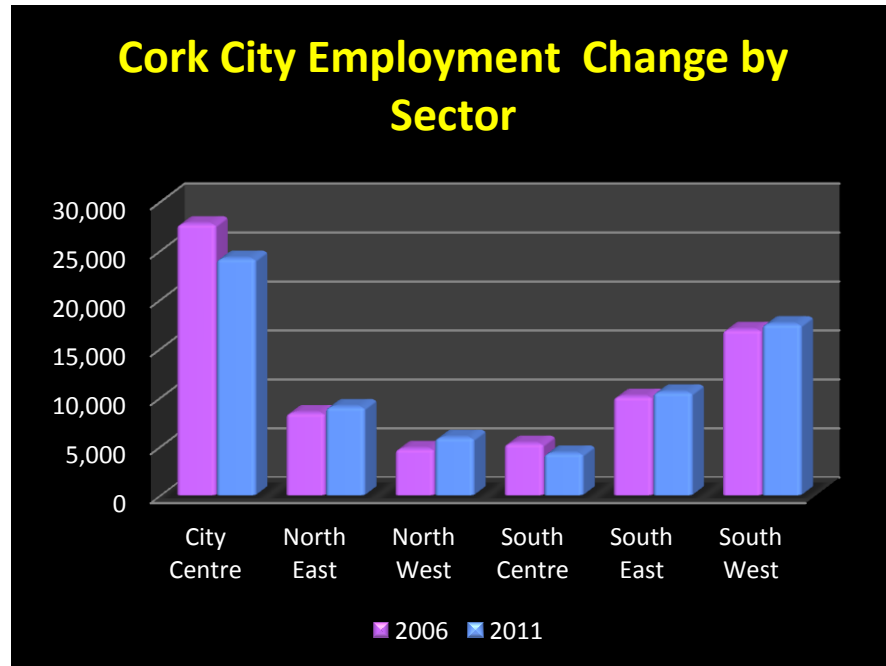
The most noticeable difference in the activity sectors for the whole city was the increase in manufacturing from 9% to 13%. This is largely due to expansion in numbers employed in Technology/IT companies, such as Apple and Blizzard, which have more than compensated for losses in more traditional industries. Retail employment across the city experienced a drop from 16% to 14% while there was little change in the remaining business activity sectors.

In terms of the City Centre sector Professional Services saw a drop of 2% from 27% to 25%. Accommodation and Food Services also saw a similar drop of 2% while Retail dropped by 1%. There has been significant development in the City Centre in recent years in terms of Retail development between the construction of developments at Opera Lane and Half Moon Street which would have added to the retail activity in the City Centre. However this was not sufficient to replace losses in other retail businesses.





## 6.0 Changing Employment Trends



Geographic Sector	Total Employees		Change	
	2006	2011	Absolute	%
City Centre	27,696	24,175	-3,521	↓ -13%
North East	8,406	9,020	614	↑ 7%
North West	4,749	5,886	1,137	↑ 24%
South Centre	5,287	4,288	-999	↓ -19%
South East	10,077	10,520	443	↑ 4%
South West	16,898	17,483	585	↑ 3%
<b>Total</b>	<b>73,113</b>	<b>71,372</b>	<b>-1,741</b>	<b>-2%</b>

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### 6.1 City Centre

The overall change in employment for the city as a whole between 2006 and 2011 was -2%. There were just two sectors which experienced a drop in employment, the City Centre and South Centre sectors. Employment in the City Centre fell by 13% from 27,696 employees to 24,092. Some of the larger businesses lost from the City Centre include Siemens, Beamish and Crawford, McKechnie which relocated to Little Island, Revenue Commissioners which relocated to Blackpool and MCM Security which relocated to Blackpool Retail Park. In addition a number of the larger employers have experienced a significant reduction in staff numbers such as Cork City Council and Mercy Hospital.

### 6.2 South Centre

The South Centre was the only other sector which experienced a fall in employment which dropped by 19% from 5,287 to 4,284. This drop was as a result of a reduction in employee numbers at Musgrave Retail Partners and Help Industries as well as a number of smaller businesses which ceased trading around the Vicars Road and Tramore Road areas.

### 6.3 North West

The North West sector experienced significant growth of 24% with an increase of 1,137 jobs from 4,749. This increase was due mainly to one of Cork City's largest employers, Apple Operations Europe which has grown significantly since 2006.

#### 6.4 North East

The North East, South West and South East experienced growth of 7%, 4% and 5% respectively. The North East increase was largely due to the relocation of Revenue and MCM Security from the City Centre as well as Marriott Global Reservations call centre which relocated from the UK. One of the most significant new employers to the Blackpool Retail Park since 2007 is Blizzard International, a major player in the rapid growing gaming industry in Ireland, and is now one of the largest employers in Cork City.

#### 6.5 South West

A number of businesses in the South West Sector have experienced significant growth such as Boston Scientific and Abtran on the Model Farm Road. There was a significant increase in the number of employees at CUH which was largely due to the transfer of services such as Erinville Maternity Services to the new CUH Maternity Hospital.

#### 6.6 South East

The increase in the South East sector was smaller than expected given the extent of development in the area over recent years however although the sector gained a number of new businesses there were also significant losses which balanced out the overall gain. The closure of the Motorola software development centre resulted in the loss of almost 400 jobs while there was a significant reduction in staff numbers at St. Finbarr's Hospital and RCI call centre. In terms of the increase in employment figures in the South

East sector, there were a number of businesses which have relocated from the City Centre to the South East such as Vox Pro, Solarwinds and ATOS, which acquired the IT solutions and services subsidiary of Siemens in 2010. The South East sector has also attracted a number of new businesses to the area such as McAfee, Quest, CITCO, Grosvenor Cleaning and also Big Fish Games.

## 7.0 Attractiveness of Cork City as a Business Environment

During the survey businesses were asked what factors they thought would enhance Cork City Centre as a business environment. The City Council received over 900 responses from business owners in the City Centre. The responses represent business people's perceptions of the issues in the city and how they could be resolved. The key factors were as follows:

1. Accessibility i.e. how easy it is to reach the city centre (63%): Suggestions included free or reduced car parking, more park and ride facilities and improved public transport and cycling facilities
2. Rates (14%): requested rates be reduced
3. Anti-social behaviour (7%): concerns related to graffiti, begging and street drinking
4. Dereliction and Vacancy (5%): Suggestions included grant schemes and rate reductions to incentivise upgrading of buildings

Other issues included:

- Improvements to the public realm, including more landscaping, street lighting, and street cleaning
- Improved arrangements for loading and deliveries
- The need for more rubbish bins and other measures to reduce litter
- Need for more footfall and planned events in the City Centre

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- Pedestrianisation and improved footpaths (generally calls for more, though some are against)
- Branding and marketing of the city
- High rents, water, and refuse charges
- Traffic congestion
- Better Public Transport / Transport Links / Integrated Public Transport System
- More relaxed standards in relation to advertising and outdoor seating
- More wayfinding and heritage signage
- Drainage (odour) problems around Academy Street, French Church Street, and Washington Street
- Flooding problems on Oliver Plunkett Street and Paul Street
- Refuse collection issues

This compilation of business people's perception of the key issues and possible solutions should help guide the City Council in responding to the issues effecting businesses and the economy of the central area of the city.