



Comhairle Contae an Chláir
Clare County Council

Clare County Development Plan 2017–2023

Retail Strategy for the Mid West Region 2010–2016

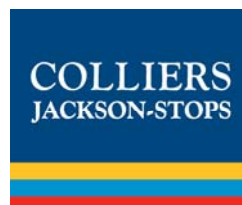




This Strategy was prepared by the Mid West Regional Authority in conjunction with Limerick City Council, Limerick County Council and Clare County Council working with Colliers CRE and Colliers Jackson Stops.

Final Report December 2009

(Please note that all figures contained in the report are dated from the baseline of March 2009)



CONTENTS (Volume 1)	PAGE
EXECUTIVE SUMMARY	iv
GLOSSARY OF TERMS	ix
1.0 INTRODUCTION TO THE RETAIL STRATEGY	1
Introduction	1
Terms of Reference	3
Study Approach.....	4
Structure of the Report.....	6
Public Consultation	7
2.0 REVIEW OF THE PREVIOUS RETAIL STRATEGY.....	8
Introduction	8
Changes to Key Data Assumptions (Consumer Demand)	8
Changes to Retail Floorspace (Retail Supply)	14
Overview of Previous Retail Strategy.....	16
Conclusions in Relation to the Review	19
3.0 RETAIL MARKET REVIEW.....	21
Introduction	21
Economic Context	21
Retail Market Overview	23
Characteristics of Retail Supply and Demand.....	30
Other Forms of Retailing	31
Assessment of Retail Floorspace Stock.....	33
The Retail Development Pipeline.....	37
Summary.....	39
4.0 SHOPPING PATTERNS AND EXPENDITURE FLOWS	41
Introduction	41
Assessment of the Mid West Retail Economy	41
Retail Trade Patterns by Council Area.....	47
Centre Dominance	53
The Catchment Area of Limerick City Centre.....	54
Summary.....	55
5.0 RETAIL FLOORSPACE NEED ASSESSMENT	56
Introduction	56
Approach to Quantifying Retail Floorspace Need	57
Principal Data Sources.....	59
Key Assumptions	60
The Need for Additional Retail Floorspace	67
Summary	75
6.0 THE RETAIL PLANNING STRATEGY.....	77
Introduction	77
The Retail Strategy Vision.....	77

The Retail Hierarchy for the Mid West Region	80
Policy Guidance and Recommendations	83
Proposals for Continued Monitoring	95
Development Management	98
Summary	102
Maps (Proposed City and Town Centre Boundaries)	103

APPENDICES (Volume 2)

Appendix 1: Copy of Study Brief (Extract)

Appendix 2: Town Centre Health Check Proformas

Appendix 3: Household Telephone Survey

- (A) Objectives and Methodology
- (B) Sample Breakdown and Statement of Reliability
- (C) Survey Questionnaire
- (D) Key Results
- (E) Summary of Market Share Data by Centre and Zone

Appendix 4: Technical Data

- (A) Population Estimates and Projections
- (B) Resident Consumer Retail Expenditure Per head and Expenditure Growth Forecasts
- (C) Tourist Expenditure on Shopping within the Mid West Region

Appendix 5: Retail Floorspace Data: Floorspace Stock Figures and Turnover Estimates

- (A) Methodology for Estimating Existing Retail Floorspace Stock
- (B) Existing Retail Floorspace and Retail Development Pipeline
- (C) Retail Development Pipeline – Turnover Estimates at 2016 and 2022

Appendix 6: Quantitative Retail Floorspace Need Assessment

- (A) Description of Methodology
- (B) The Need for Additional Non-Bulky Comparison Goods Floorspace
- (C) The Need for Additional Bulky Comparison Goods Floorspace
- (D) The Need for Additional Convenience Goods Floorspace

Appendix 7: Influences On The Update Of The Retail Strategy

Appendix 8: List of Public Submissions Received

This Report has been prepared by:

**Colliers CRE,
Marylebone Lane
London W1U 1HL
www.collierscre.com**

**Contact: Dr Richard Doidge
Tel: +44 (0)20 7344 6872**

EXECUTIVE SUMMARY

1. In January 2009, Colliers CRE was commissioned by the Mid West Regional Authority, Limerick City Council, Limerick County Council and Clare County Council to carry out a study of retailing to inform an update of the Retail Strategy for the Mid West Region.
2. The previous Retail Strategy was adopted in 2003 and covered the time frame of 2003-2011, whilst the new Strategy extends the period to 2016. The four key requirements of the study are as follows:-
 - to review retail development and retailer trends within the Mid West Region since the 2003 Strategy was published;
 - to produce up to date information on the quantum and range of retail offer available in the region, and compare it against what was available in 2003;
 - to quantify the need for any additional retail floorspace within the region through to 2016; and
 - to use the results of this assessment to update the 2003 Mid West Retail Strategy and to set out policies and recommendations to guide the retail strategies and policy initiatives of the Councils.
3. The Mid West Region embraces the City of Limerick, Counties Clare and Limerick and North Tipperary, and is one of eight statutory regions of Ireland. Although North Tipperary is geographically part of the Mid West and therefore forms part of the study area for this update, it is not part of the new Retail Strategy.
4. The previous Retail Strategy was prepared during a period of considerable economic buoyancy and this growth continued through to 2007. Since then, however, the global credit crunch has led to significant economic decline and the on-set of recession. This has manifested itself in many ways including rising unemployment, falling house prices and

declining GDP. In turn, the retail economy has been badly affected with a major slow down in retailer demand as a result of falling consumer retail expenditure.

5. Due to the sudden downturn in the economy, the previous Retail Strategy was over-optimistic in its retail expenditure growth assumptions. Similarly, the Strategy over-estimated population growth in the Mid West and significantly under-estimated the growth in special forms of trading (including internet shopping). For this reason, the previous Retail Strategy is likely to have materially over-estimated the quantitative need for additional retail floorspace in the region through to 2011.
6. In practice, however, even these floorspace need over-estimates have been greatly exceeded by the quantum of new retail development actually built in the Mid West. Since 2002 the supply of retail floorspace has doubled in the region and now totals some 532,000 sq m net.
7. The pace of new build combined with the economic downturn, has, of course, led to a huge existing over-supply of retail floorspace stock in the Mid West with around 86,000 sq m net now estimated to be vacant. In addition, the construction of several major new retail schemes around the Limerick area have slowed and are not expected to be completed for some time. Moreover, given the adverse economic conditions, it is estimated that many of the retailers across the Mid West are currently under-trading, and therefore must capture some of the future growth in spend in order for them to return to previous levels of trading viability.
8. Reflecting this already considerable volume of retail floorspace, it is not altogether surprising that a new household survey confirms that the Mid West retains a very high proportion of its retail expenditure, with just 5% leaking out to other centres. This leaves little scope to clawback trade in support of new retail floorspace in the future.
9. An assessment both of trading patterns and the retail market point to the current retail offer in Limerick City Centre being sub-standard. Its share of retail floorspace in the Mid West has fallen by more than half since 2002 as consumers increasingly visit other newer out of centre and suburban retail destinations to carry out their shopping, such as the Crescent Shopping Centre and a range of retail parks.

10. As a result, rents, sales densities and foot fall in Limerick City Centre are far behind those of other major provincial city centres such as Galway and Cork, and it no longer performs to its Tier 1 Status in the shopping hierarchy. If redundancy of the city centre retail stock continues, mainly due to lack of suitability, investment and over provision of retail in the suburbs it will further weaken the overall retail mix, diversity and depth of the retail offer. Limerick City Centre is in urgent need of a comprehensive retail development that will prevent further erosion of its retail position and stimulate wider regeneration of the city centre as whole.
11. From a market perspective, there is already too much suburban retail development in the Limerick urban area and with very limited retail demand at the present time this is resulting in high levels of voids. The smaller towns in the Mid West should focus on their real catchments which tend, in the main, to be relatively concentrated. To service essentially local needs, these centres should cater primarily for daily shopping and offer convenience goods, lower order comparison goods and a range of services.
12. Mindful of certain weaknesses in the technical analysis underpinning the previous Retail Strategy, the quantitative assessment of retail floorspace need carried out to inform the new Strategy has been built on a platform of new data, including a new household telephone survey, health checks of key centres and the latest population projections. In addition, *Oxford Economics* has produced bespoke forecasts of the growth in consumer retail expenditure per head in the Mid West Region by broad category of goods. This takes into account the recent economic downturn and the much lower expectations of spending growth in the future and is not a projection of past trends or performance.
13. The retail floorspace needs assessment also takes into account the existing retail development pipeline throughout the Mid West. These retail commitments (schemes under construction or with planning consent as at March 2009) total some 120,000 sq m net and represent (if built) a 23% addition to the current stock. However, in view of current economic circumstances it is unlikely that all existing retail schemes in the pipeline will proceed to completion and full occupation. Accordingly, need has been determined on the basis of including and excluding retail commitments. The assessment adopts a traditional 'constant market shares' approach for convenience goods and bulky comparison goods,

but in relation to non-bulky comparison goods, a realistic upwards adjustment is made to Limerick City Centre's market share to reflect the planning requirement to return the city centre to its rightful position as a Tier 1 regional retail centre and shopper destination.

14. Due to the Mid West already being over-shopped, the huge scale of the retail development pipeline and the limited forecast growth in consumer retail expenditure per head through to 2016, the quantitative assessment indicates that there is no need for any further retail floorspace provision in the region as a whole through to 2016 (the end date of the new Retail Strategy). However, at the County or city level there is a need in certain locations for specific categories of goods, particularly if retail commitments are excluded. Qualitative need may also emerge as a factor in determining what is the most appropriate scale and distribution of any new retail development at the local level.
15. The location with the greatest retail requirement is Limerick City Centre, where (including commitments) a need for up to 16,000 sq m net of additional non-bulky comparison goods floorspace is forecast by 2016 (rising to 39,000 sq m net at 2022). This equates to around 24,600 sq m gross and 60,000 sq m gross at 2016 and 2022 respectively. In addition, in planning for any major new retail scheme in the city centre, an appropriate allowance should be made for the inclusion of non-retail uses, such as food and beverage operators and other services.
16. The retail strategy responds to the effects of recent development by re-establishing the importance of Limerick City Centre at the top of the regional hierarchy, and just as importantly, the preferred location for new retail development in the Limerick Metropolitan Area. The intention is for Limerick City Centre to recapture trade it has lost to the Crescent Shopping Centre and to out of centre shopping facilities. Accordingly there should be no further extension to the Crescent Shopping Centre or new/extended out of centre development, and any proposals at the district centres should not change their existing role or scale.
17. In Ennis, the strategy is to enhance the town centre shopping offer through the introduction of modern shop units whilst protecting and enhancing the town's attractive character. It is also proposed that an improved focus of bulky comparison goods retailing be achieved in suitable designated areas to secure a qualitative improvement in provision. New

convenience floorspace should be accommodated in a suitably located district centre if it cannot be accommodated in the retail area.

18. At Shannon, the Masterplan proposals to extend the town centre to the north are supported. The potential to develop a distinct shopping character to increase the town's attraction as part of a linked Gateway with Limerick city centre should be investigated.
19. Elsewhere in the Mid West the general approach is to improve provision to support the existing role of the towns and the level of service they provide to their local catchment populations, including where relevant their tourist and visitor functions.
20. The successful implementation of the Retail Strategy is dependent upon cross-boundary co-operation between the Councils.

MID WEST REGIONAL STRATEGY

GLOSSARY OF TERMS

Convenience Goods	Comprises all food and non alcoholic beverages bought by households for consumption at home; alcoholic drink bought from retail outlets; tobacco products, newspapers and magazines, and non durable household goods (eg. soaps and washing powders/liquids, disinfectants and pesticides; brooms, brushes and dust pans, dusters and tea towels, clothes pegs, nails, screws, nuts, adhesive tape, string etc).
Comparison Goods	The retailing of other goods types where there is an element of comparison in addition to simple price comparison. These goods ranges include books; clothing and footwear; furniture, floor coverings and household textiles; audio visual equipment; hardware and DIY supplies; tennis goods; jewellery, watches and clocks; bicycles; other recreational and miscellaneous goods (eg. Musical instruments, sports equipment; camping equipment; toys, video games software; plants, seeds, fertilisers and compost; pet foods and products; stationery; articles for babies such as pushchairs, car seats etc. and miscellaneous personal articles etc).
i) High Order Comparison	Top of the range comparison goods and brands normally sold through department stores, international and national multiples and specialist high quality outlets including items such as luxury and designer clothes, footwear and furniture.
ii) Middle Order Comparison	Goods retailed by national multiples and department stores often including own brand clothing and footwear ranges (as opposed to designer).
iii) Low Order Comparison	Less expensive goods focussed at the value end of the market generally sold through national multiples, including some of the larger convenience traders, and independent outlets. The latter include hardware stores in small towns and villages.
Bulky Goods Retailing	The sale of predominantly comparison goods which are of a size that they would normally need to be

	taken away by car or which, whilst not individually large, would be bulky when part of a collective purchase. For the purpose of this study the product ranges comprise repair and maintenance materials; furniture and furnishings, carpets and other floor coverings; household appliances; tools and equipment for the house and garden, audio-visual, photographic and information processing equipment, other major durables for recreation and culture.
Core Retail Area	The area including and immediately adjacent to the defined “prime pitch” which is the area which achieves the highest rentals, best yields and is most in demand from operators. Typically for these reasons it has a high proportion of units occupied by shops.
Special Forms of Trading	Those retail sales not undertaken in shops, including sales via the internet, by mail order, TV shopping, party plan, vending machine, door to door and through temporary open market stalls.
Gross Retail Floorspace	The total floor area within buildings which is occupied exclusively by a retailer or retailers.
Net Retail Sales Area	The area within the shop or store which is visible to the public and to which the public has access including fitting rooms, checkouts, the area in front of checkouts, serving counters and the area behind used by serving staff, areas occupied by retail concessionaires, customer service areas, and internal lobbies in which goods are displayed, but excluding cafes and customer toilets.

Types of Centre

Town Centre	The term “Town Centre” is used to cover City, Town and District centres which provide a broad range of facilities and services and which fulfil a function as a focus for both the community and public transport. It excludes retail parks, local centres and small parades of shops of purely local significance.
District Centre	Either a traditional or purpose built group of shops, separate from the town centre and either located

	within the built up urban area or in a suburban location on the edge of the urban area, usually containing at least one food supermarket or superstore and non retail services such as banks, building societies, and restaurants.
Local Centre or Neighbourhood Centre	Small groups of shops typically comprising a newsagent, small supermarket/general grocery store, sub-post office and other small shops of a local nature serving a small, localised catchment population.

Types of Location

Retail Area	That part of a town centre which is primarily devoted to shopping.
Prime Pitch	That part of the retail area of a town centre or retail mall where pedestrian flows are greatest, competition for representation is greatest and rents are noticeably higher than elsewhere.
Edge of Centre	A location within easy walking distance (usually not more than 300 – 400 metres) of the primary retail area of a town centre, and providing parking facilities that serve the centre as well as the new development thus enabling one trip to serve several purposes.
Out of Centre	A location that is clearly separate from a town centre but within the urban area, including programmed extensions to the urban area in approved or adopted Development Plans.
Out of Town	An out of centre development on a green field site, or on land not clearly within the current urban boundary.

Types of Convenience Goods Shopping Outlet

Convenience Outlet	Single level, partially self service store with no adjacent car parking, selling food and other convenience items with a net sales area of not more than about 500 sq m and a product range less than that carried by a supermarket. Such stores are characterised by longer opening hours
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	than supermarkets.
Supermarkets	Single level, self service store selling mainly food, with a net sales area of less than 2,500 sq m often with adjacent car parking.
Superstores	Single level self service stores selling mainly food, or food and some non-food goods, usually with at least 2,500 sq m net sales floorspace with dedicated surface level car parking.
Hypermarket	Single level, self service store selling both food and a range of comparison goods, with net sales floorspace in excess of 5,000 sq m with dedicated surface level car parking.
Discount Food Store	Single level, self service store normally of between 1,000 – 1,500 sq m of gross floorspace selling limited range of goods at competitive prices, often with adjacent car parking.

Types of Comparison Goods Shopping Outlet

<u>Retail Warehouses and Retail Parks</u>	Retail warehouses require extensive areas of showroom space often with minimal storage requirements. Retail Parks are agglomerations of retail warehouses grouped around a common car park selling mainly bulky household goods.
<u>Factory Outlet Centres</u>	This form of retailing involves ranges from the sale of products at discount prices in individual factory shops to purpose built factory outlet centres. Individual shops can be ancillary to the main manufacturing activity.
<u>Retail Warehouse Clubs</u>	Retail warehouse clubs or discount clubs combine elements of cash and carry wholesaling with sales to qualifying members of the public. Despite restrictions on those who may shop in them, these outlets often share the characteristics of large retail outlets.

1.0 INTRODUCTION TO THE RETAIL STRATEGY

Introduction

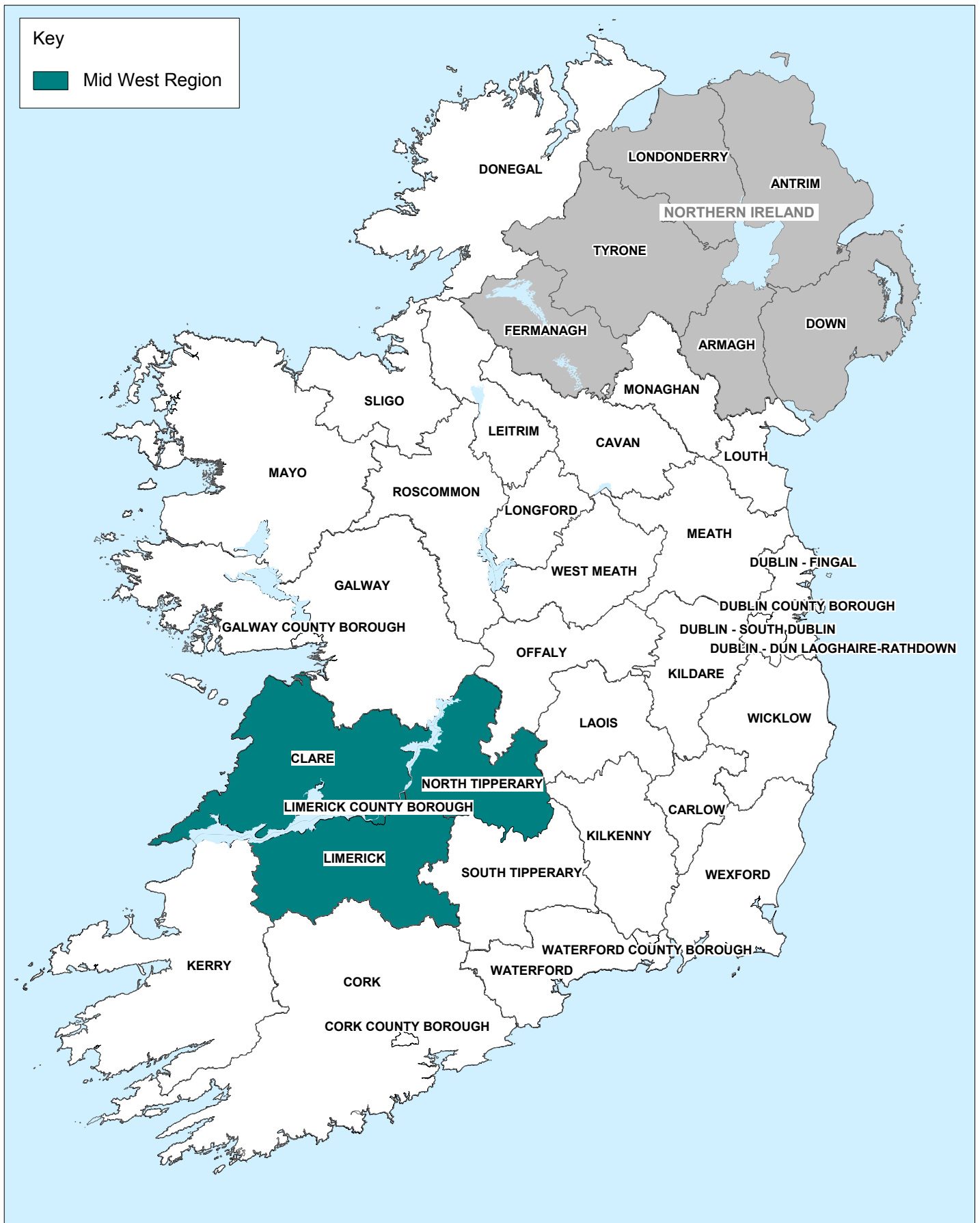
- 1.1 The existing Retail Strategy for the Mid West Region was adopted in 2003 and covered the time frame of 2003-2011. Since 2003 the Mid West has seen significant economic and population growth, whilst the Department of the Environment, Heritage and Local Government (DoEHLG) has published a revised version of the Retail Planning Guidelines for Planning Authorities (RPG's). Throughout the Mid West Region, in particular the Limerick urban area, there has also been significant expansion in retail – changing the patterns, options and scale of shopping available. In light of these issues, the Councils' and the Mid West Regional Authority decided that it was essential that the Retail Strategy was reviewed and updated, extending the time frame to 2016.
- 1.2 In January 2009, Colliers CRE was commissioned by the Mid West Regional Authority, Limerick City Council, Limerick County Council and Clare County Council to carry out a study of retailing in the Mid West Region to inform the revised Retail Strategy. The four key requirements of the study are:-
- to review retail development and retailer trends within the Mid West Region since the 2003 Strategy was published;
 - to produce up to date information on the quantum and range of retail offer available in the region, and compare it against what was available in 2003;
 - to quantify the need for any additional retail floorspace within the region through to 2016; and
 - to use the results of this assessment to update the 2003 Mid West Retail Strategy and to set out policies and recommendations to guide the retail strategies and policy initiatives of the Councils.

- 1.3 The Mid West Region embraces the City of Limerick, Counties Clare and Limerick and North Tipperary (see **Figure 1.1** overleaf). It is one of eight statutory regions and comprises of about 10% of the national land area and population of the country. The National Retail Planning Guidelines for Local Authorities, provide a comprehensive framework to guide local authorities. The Guidelines identify those counties and cities which should jointly prepare comprehensive retail strategies. For the Mid West, the Guidelines require Limerick City Council, Limerick County Council and Clare County Council to prepare a joint strategy. Therefore, although North Tipperary is geographically part of the Mid West and therefore forms part of the study area for this update, it is not part of the new Retail Strategy.
- 1.4 The Mid West region is relatively diverse, encompassing areas of strong urban growth, particularly the Limerick /Ennis/Shannon triangle, as well as rural areas which are experiencing significant population loss and decline. The population of the Mid West Region in 2006 was 360,028, representing 8.6% of the Irish total of c.4.2 million. The breakdown of the regional population total by sub area is set out in **Table 1.1**.

Table 1.1 Population Breakdown of Mid West Region, 2006

Area	Population	(Col. %)
County Clare	110,950	31
County Limerick	123,265	34
Limerick City	59,790	17
North Tipperary	66,023	18
Total	360,028	100

Fig. 1.1 Map of Counties in the Mid West Region



Terms of Reference

1.5 The main objectives of this study were to review, update and extend to 2016 the existing Retail Strategy for the Mid West Region, and as part of this work to provide strategic guidance to promote the development of a vibrant and competitive retail sector, whilst protecting the integrity, vibrancy and viability of existing centres. In so doing the recommendations should ensure that any new retail provision is appropriate in scale, location and character, so as to promote the sustainable economic development and employment objectives identified in the strategy. The study brief prepared by the Councils' sets out the detailed terms of reference for preparing this Review of the Retail Strategy for the Mid West Region. These may be summarised as follows:-

- to review the existing Mid West Retail Strategy in the context of new national, regional and local planning policies and guidance, and also the interim Mid West Area Strategic Plan (MWASP);
- to review the retail market and identify trends and future prospects for towns and cities throughout the region;
- to ensure that recommendations are aligned with Master Plans being prepared by various agencies throughout the region;
- to verify and update information on the current stock of retail floorspace throughout the region, and to categorise available floorspace by hierarchy, location and type;
- to review the performance of the retail hierarchy and ascertain the impact, if any, of retail completions since 2002 on the hierarchy. Make recommendations as to any gaps in the hierarchy or required changes in centre designations;
- to focus, in particular, on the retail performance of, and trading relationships between, Limerick City, Shannon and Ennis. Comment on centre vitality and viability and actions to enhance these;

- to identify and analyse the retail rental performance of Limerick City Centre and suburban locations, and compare to rental levels in other large cities such as Dublin, Galway and Cork;
- to define boundaries of the major Core Shopping Centres and also for towns assessed in the existing strategy;
- to address sustainability, social inclusion and urban regeneration issues, including 'greenfield' and 'brown field' development;
- to prepare retail strategies and policies for Limerick City, Limerick County and Clare County. Ensure that these provide clear guidance on how retail planning applications will be dealt with and provide mechanisms for ensuring a 'right balance' between meeting needs and sustaining vital town centres;
- and lastly, to make recommendations in respect of the on-going monitoring and implementation of the new regional retail planning strategy.

1.6 In addition, at the inception meeting, Colliers CRE recommended to the Councils that the Review should be underpinned by a new household telephone survey of residents in the Mid West Region. Given that the survey underpinning the previous Retail Strategy dated from January 2002, it was felt that the considerable amount of new retail development that had occurred since then would have materially changed shopping patterns and the flows of consumer retail expenditure. It was subsequently agreed by the Councils that a new survey would form part of the study.

Study Approach

1.7 The updating of the 2003 Retail Strategy involved combining new analytical research, with recent market trends and retail planning expertise. Although the study has regard to existing plans and policy documents and recent retail developments, it nevertheless seeks to adopt a new approach to the formulation of an updated and revised Retail Strategy for the Mid West Region by incorporating experience of current retail planning policy alongside the production of new data on the retail sector.

1.8 It is vital that the revised Retail Strategy is based upon quality information and robust and transparent research, analysis and forecasts. Therefore, although some data were available prior to the commencement of the study, it was necessary that a substantial body of **new** information was acquired in order to satisfactorily meet the study objectives. This new data fell into three broad categories:-

- **consumer survey** - a telephone survey of 825 households living throughout the Mid West;
- **health checks** - an audit of all of the key centres and out of centre retail locations in the Mid West ;
- **statistics** - retail floorspace of exiting centres and shops throughout the Mid West;¹
 - details of retail floorspace commitments (floorspace under construction or with planning consent but not yet started);¹
 - consumer retail expenditure per head for residents of the Mid West and the forecast growth in this expenditure;²
 - population estimates and projections for the Mid West Region and defined geographical sub-areas.³

1.9 A number of organisations and individuals have assisted in the preparation of this report. Their help is gratefully acknowledged. Regard was given to all views expressed and submissions

¹ Retail floorspace information has been provided by the four Councils within the Mid West Region.

² Consumer retail expenditure per head and forecasts have been estimated by *Oxford Economics*.

³ Population figures have been supplied by the MWRA.

received during all stages in the production of the Retail Strategy, with the result that the Strategy as now presented was informed though not necessarily directed by the many opinions and perspectives given.

- 1.10 Reflecting the study objectives outlined above, it should be borne in mind that this Retail Strategy primarily provides a strategic assessment of retailing throughout the Mid West and does not directly address individual sites and/or development proposals.

Structure of the Report

- 1.11 The report is in two volumes. Volume 1 (this volume) comprises the consultants report. Volume 2 contains a number of Appendices which provide technical information relating to the statistics that have been used, together with details of existing retail floorspace and retail schemes in the development pipeline. This volume also contains the detailed quantitative retail floorspace need tabulations (spreadsheets) with separate series addressing convenience goods and comparison goods.
- 1.12 Following this Introduction, Section 2 presents a short review of the previous Mid West Retail Strategy and describes the main changes to the key data assumptions and policy that have occurred since 2003. Section 3 describes how the retail sector in the Mid West has evolved since the publication of the 2003 Retail Strategy and outlines the current challenges facing city and town centres in meeting the needs of retailers and consumers. This section also quantifies changes to the retail floorspace stock of the region.
- 1.13 Drawing on the results of the new household telephone survey, Section 4 quantifies and maps consumer retail spending patterns across the Mid West, disaggregating the analysis of expenditure by Council area and broad category of goods. Section 5 outlines the approach adopted to quantify the need for additional retail floorspace in the Mid West Region through to 2016 and sets out the results of the assessment. Underpinned by all this new analysis, Section 6 presents the new Retail Strategy for the Mid West and sets out new retail planning policies and recommendations.

Public Consultation

- 1.14 Public consultation was undertaken at the start (pre-draft) of the review process, with notices placed in a number of local papers. In total 13 submissions on the review of the Mid West Retail Strategy were received. During the preparation of the Strategy all of the wide ranging views expressed were considered and relevant points have been reflected within the Strategy. A list of submissions received is included at **Appendix 8**.

2.0 REVIEW OF PREVIOUS RETAIL STRATEGY

Introduction

- 2.1 This section presents a review of the key data projections which underpinned and shaped the quantitative retail floorspace need assessment of the previous Retail Strategy for the Mid West. It then compares the assumptions used with actual changes that have occurred since 2003 and existing forecasts. This is followed by a short review of policy in the 2003 Retail Strategy.

Changes to Key Data Assumptions (Consumer Demand)

- 2.2 The first retail planning strategy for the Mid West Region was prepared by DTZ Pinda Consulting and was published by the Mid West Regional Authority in February 2003. Since it was published the Mid West has experienced considerable changes to its population, economy and retail offer. The 2003 Strategy sought to forecast these trends through to 2011 but, in practice, the projections have not always been matched by the reality. Moreover, the results of the baseline household telephone survey carried out in January 2002 were also out of date as shopper behaviour has changed considerably in response to new shopping centre developments, particularly in the Limerick urban area. As such there was a clear need for updated information on shopper behaviour as well as a requirement for new expenditure forecasts, made all the more important by the recent downturn in the economy brought about by the credit crunch.
- 2.3 This report takes into account the significant changes that have occurred within the Mid West Region since 2003 and provides new economic, demographic and retail forecasts through to 2016 (and 2022)¹. These key changes provide an important context to the assessment of existing shopping patterns and the quantification of additional retail floorspace need, which has a significant bearing on the new Retail Strategy.

¹ Although the end date for the new Retail Strategy is 2016, retail floorspace need has also been estimated for the later year of 2022.

Population

- 2.4 The 2003 Retail Strategy estimated the 2001 population of the Mid West Region at 347,516 and projected that it would grow to 376,255 by 2006, reaching 407,371 at 2011.¹ These figures compare to the latest estimates and projections which give the 2006 population of the Mid West at 360,028 with the total expected to rise to 387,652 by 2011 and 421,779 at 2016. The long term projection for 2022 is for continuing population growth to reach 462,732. (see **Appendix 4A**). A comparison of the two sets of projections is set out in **Table 2.1**. This shows that the 2003 Strategy over-estimated the Mid West's population at 2006 by 16,227 (about 4.5%) – equivalent to the size of a small town. By 2011 the gap between the two sets of figures was projected to increase to 19,719.

Table 2.1 Mid West Population Projections

Year	2003 Retail Strategy Projection	2009 Retail Strategy Projection	Difference
2001	347,516	-	-
2006	376,255	360,028	(16,227)
2011	407,371	387,652	(19,719)
2016	-	421,779	-
2022	-	462,732	-

- 2.5 The projections adopted for this review show significant and continuing gains in the population of the Mid West throughout to 2016 and 2022. Between 2006-16, for example, the population of the Mid West is expected to increase by 17.2% or 61,751, which is more than the current population of Limerick City.

¹ Source: Retail Strategy for the Mid West Region , 2002-2011, February 2003. (Table 2.3).

The Economy

- 2.6 The likelihood of significant economic expression of the national economy was built into the model used for the 2003 Retail Strategy of the Mid West.¹ This assumption fed through into the forecasts of growth in consumer retail expenditure per head. In the intervening years, the level of economic growth has, until recently, been generally very high. By mid 2008, however, Ireland in line with many other countries had begun to be effected by the global credit crunch. GDP began falling in consecutive quarters, housing growth came to an end, there was a rapid slowdown in credit growth and the world economy weakened considerably. **Table 2.2** sets out the recent changes that have characterised the Irish economy. The nation's economic prospects through to 2016 are now very different to those forecast back in 2003. This sudden turn around in economic fortunes will clearly have a major effect on the retail economy of the Mid West and therefore have an important bearing on the new Retail strategy.

Table 2.2 Economic Context to Previous and Revised Retail Strategies

Previous Retail Strategy	Revised Retail Strategy (Current economic conditions)
<p>Rising GDP</p> <p>Falling unemployment</p> <p>Rising house prices</p> <p>High inflation</p> <p>Strong investment</p> <p>Falling government debt</p> <p>Rising consumer expenditure</p> <p>Retail sales growth</p>	<p>Falling GDP</p> <p>Rising unemployment</p> <p>Falling house prices</p> <p>Falling inflation (deflation)</p> <p>Weak investment</p> <p>Falling tax revenue</p> <p>Falling consumer expenditure</p> <p>Falling retail sales</p>

¹ The Technical Appendix to the 2003 Retail Strategy for the Mid West Region stated (paragraph 7.5) that “*the sound underlying fundamentals of the Irish economy should see the economy levelling off at its trend growth rate of around 5% over the medium term*”.

Retail Expenditure

- 2.7 The 2003 Retail Strategy estimated the consumer retail expenditure per head of residents within the Mid West by using data published by the Central Statistics Office (CSO) in their Annual Services Inquiry (ASI).¹ To underpin the new Retail Strategy, *Oxford Economics* has produced consumer spend per head estimates based on the Irish National Income and Expenditure (NIE) data. This source gives significantly lower estimates of consumer spending on retail goods in Ireland than the ASI, even when adjusted for year and price base.
- 2.8 The CSO confirm that the inputs used in the estimation of the NIE data produce more reliable consumer retail expenditure per head data. The ASI data used in the 2003 Strategy relates to retail turnover and **not** expenditure, which is what is measured by the NIE data and which is required. Moreover, the CSO confirm that the ASI retail turnover data includes material amounts of spend on **non**-retail goods,² which artificially boosted the retail spend per head figures in the 2003 Retail Strategy and accounts for much of the difference between the two data sets. Accordingly, the 2003 Retail Strategy over-estimated consumer retail expenditure per head on retail goods and combined with (probable) low estimates of retail floorspace stock³ led to artificially high retail sales densities being adopted.
- 2.9 The new Retail Strategy adopts the CSO recommended NIE data source which produces noticeably lower (but more reliable) figures for average consumer spend per head on retail goods. Combining these figures with a higher but more realistic estimate of available retail floorspace stock in the Mid West³ produces lower actual retail sales densities than achieved back in 2003. Of course, the downturn in the economy over the past 12-18 months has led to a reported significant fall in sales densities for many retailers and it is important that the new Retail Strategy takes this important change in performance on board.
- 2.10 In terms of real growth in consumer retail expenditure per head, the 2003 Retail Strategy adopted forecasts from 2001 through to 2011 which were based on ESRI Medium Term

¹ Technical Appendix to the Retail Strategy for the Mid West Region, Final Report, May 2003, Appendix D, paragraphs D2-D4.

² The ASI retail turnover data includes items such as prescriptions and other medical items paid for by the State, as well as repair and maintenance by owner occupier landlords, purchases by non-profit institutions and some expenditure by small businesses.

³ See paragraph 2.18 below.

Review forecasts for the entire country and related to all retail goods. Convenience goods and comparison goods growth rates for the Mid West were then estimated. In **Table 2.3** the all retail goods and convenience goods (only) real expenditure growth forecasts adopted in 2003 are compared to recent actual growth and the current forecasts produced for the new Retail strategy by *Oxford Economics*.

Table 2.3 Consumer Retail Expenditure Growth per Head

Forecasts Adopted by 2003 Retail Strategy			
All Retail Goods Expenditure		Convenience Goods Expenditure (Only)	
2001-2005	4.1% pa (F)	2001-2011	2.3% pa (F)
2005-2010	3.7% pa (F)		
2010-2015	1.9% pa (F)		
Actual Growth (2001-07) and Forecasts Adopted in New Retail Strategy			
All Retail Goods Expenditure		Convenience Goods Expenditure (Only)	
2001-2005	2.5% pa (A)	2001-2005	0.0% pa (A)
2005-2007	5.7% pa (A)	2005-2007	2.4% pa (A)
2007-2016	1.9% pa (F)	2007-2016	0.3% pa (F)

(A): Actual Growth

(F): Forecast Growth

- 2.11 The comparisons of the two sets of consumer retail expenditure forecasts confirm that the 2003 Retail Strategy was based on over-optimistic growth assumptions through to 2007. From 2007 onwards, the current forecasts are also lower than those adopted in the previous Strategy for the period 2007-10 for all retail goods and from 2007-16 for convenience goods only.
- 2.12 In view of the onset of economic recession and the importance of up to date and realistic expenditure forecasts in the quantitative assessment of retail floorspace need, the Revised Strategy incorporates new, bespoke consumer retail spend per head estimates and

expenditure forecasts produced especially for this study by *Oxford Economics*, a leading independent firm of economists and economic consultants.¹

Other Technical Assumptions

- 2.13 The scale of the any available headroom expenditure in the future is largely determined (on the demand side) by population growth and increases in consumer retail expenditure per head. However, there are two additional factors which, in practice, “soak up” some of the growth in expenditure – ‘special forms of trading’ (SFT) (which includes retail expenditure over the internet) and real changes in store productivities or sales densities.
- 2.14 In the preparation of the 2003 Retail Strategy it was projected that the levels of activity for such special forms of trading (SFT) as a proportion of comparison goods expenditure would grow to 1.5% by 2006 and 4.0% by 2011,² whilst assuming no SFT for convenience goods. The intervening years have seen a rapid expansion in broadband availability and the growth of internet shopping. The advent of more recent research on the subject indicates that it is likely that the proportion of consumer spend accounted for by SFT at the 2002 base year was under-estimated and that the rate of growth in the expansion of SFT projected to 2011 was too conservative. More recent data suggests SFT in the Mid West is likely to reach 7.3% of consumer spend on convenience goods shopping by 2016 and 12.5% for comparison goods. (See Section 5 for further details).
- 2.15 In relation to store productivity it was assumed in the 2003 Retail Strategy that there would be a 1.0% per annum real increase for comparison goods and no real growth for convenience goods.³ More recent research now available demonstrates that these assumptions are likely to have been under-estimated, with figures of at least 1.75% per annum and 0.5% per annum for comparison and convenience goods retailing respectively now considered more realistic over the long term (See Section 5).

¹ The *Oxford Economics* consumer retail expenditure per head estimates and forecasts are set out in full in **Appendix 4B**.

² Source: Retail Strategy for the Mid West Region, 2002-2011, paragraph 3.9.

³ Source: Technical Appendix to the Retail Strategy for the Mid West Region, Final Report, May 2003 (paragraph 17.18).

Changes to Retail Floorspace (Retail Supply)

- 2.16 According to the surveys carried out to inform the 2003 Retail Strategy, the Mid West contained an estimated retail floorspace stock of 266,282 sq m net as at December 2001 of which 15,871 sq m net was vacant. The floorspace breakdown by County is set out in **Table 2.4**.

**Table 2.4 Estimated Retail Floorspace Stock in the Mid West Region
by County (Sq M Net), 2002**

Area	Convenience Goods	Comparison Goods	All Retail Goods	Vacant Retail Floorspace
Clare County	12,687	32,453	45,140	2,795
North Tipperary	21,443	34,270	55,713	1,437
Limerick County	14,600	33,550	48,150	4,832
Limerick City (City Centre only)	23,856 (17,935)	77,552 (72,664)	101,408 (90,599)	6,807 (4,134)
Mid West	72,586	177,825	250,411	15,872

Source: DTZ Sherry FitzGerald Floorspace survey, December 2001. Surveys were carried out in Limerick City and environs and the towns of Nenagh, Roscrea, Thurles, Templemore, Newcastlewest, Ennis, Shannon and Kilrush.

- 2.17 Floorspace figures produced for the new Retail Strategy indicate that as at March 2009 the total retail floorspace stock totalled around 532,000 sq m net, including an estimated 86,000 sq m net of vacant retail floorspace. Thus the floorspace stock total for the Mid West as a whole has risen by a c.266,000 sq m net, which represents a doubling in supply in just seven years. The retail floorspace comparison between 2002 and 2009 is summarised in **Table 2.5** overleaf.

Table 2.5 Total Retail Floorspace Stock by Area (Sq M Net), 2002 and 2009

Area	All Retail Goods (incl. Vacant Floorspace)	
	2002	2009
Clare County	47,935	95,943
North Tipperary	57,150	120,828
Limerick County	52,982	137,241
Limerick City*	108,215	178,002
Mid West Region	266,282	532,014

*2009 total relates to Limerick City area as now defined following an extension to its boundary.

Source: DTZ Sherry FitzGerald Floorspace Survey, December 2001 and Colliers CRE/Councils figures and estimates, 2009.

- 2.18 It should be borne in mind, however, that the floorspace surveys undertaken to inform the 2003 Retail Strategy were not as comprehensive as those carried out for the new Strategy, and thus the 2002 retail floorspace totals may be under-estimates. Therefore, a small part of the gain in floorspace stock of 266,000 sq m net between 2002 and 2009 is due to the larger number of small towns included in the new survey, although most of the increase is as a result of new retail floorspace completions over the past seven years. It is clear from the floorspace comparisons that the significant addition to supply far exceeds the growth in demand (consumer expenditure) over the period.¹ Moreover, the scale of new retail floorspace built between 2002 and 2009 of c.266,000 sq m net is around 80% more than the 148,100 sq m net, which the previous Retail Strategy forecast was needed (even under its **high** scenario) through to 2011.

¹ See also Section 3.

Overview of Previous Retail Strategy

- 2.19 The 2003 Retail Strategy for the Mid West Region had regard to the national retail hierarchy defined in The Retail Planning Guidelines (RPG) for local authorities which was published in 2000 (and updated in 2005). The four tier hierarchy reflects the scale of retail development across the country and is set out in **Table 2.6**, with those centres in the Mid West in bold.

Table 2.6 The National Retail Centre Hierarchy

Tier 1	Metropolitan Dublin
Tier 2	Cork, Limerick , Galway, Waterford
Tier 3	Athlone, Carlow, Castlebar, Clonmel, Drogheda, Dundalk, Ennis , Kilkenny, Letterkenny, Monaghan, Mullingar, Newbridge, Portlaoise, Tralee, Tullamore, Wexford
Tier 3 (convenience lead)	Arklow, Athy, Ballina, Cavan, Dungarvan, Enniscorthy, Killarney, Longford, Mallow, Midleton, Naas, Navan, Nenagh, New Ross, Sligo, Swords, Thurles
Tier 4	(75 Centres with population between 1,500 – 5,000 including) Kilrush, Sixmilebridge, Newmarket on Fergus, Annacotty.
Other	Local level shops comprising corner shops, village stores and post offices

- 2.20 The 2003 Retail Strategy defined a more detailed retail hierarchy for the Mid West which was based on the RPG national hierarchy, but also took into account a review of existing settlement characteristics and regional and local planning policies. This hierarchy is shown in **Table 2.7** overleaf.

Table 2.7 The Mid West Retail Hierarchy (2003 Retail Strategy)

Mid West Retail Hierarchy		
	METROPOLITAN AREA	HINTERLAND AREA
Tier 1	Metropolitan Centre	
	Limerick City Centre	
Tier 2	Main Retail Centres Dooradoyle	Major Town Centres Level 1 Clare : Ennis Level 2 Clare : Shannon Limerick County : Newcastlewest North Tipperary: Nenagh and Thurles
Tier 3	District Centres Level 1 Caherdavin, Castleroy and Parkway Level 2 Roxboro Shopping Centre	Town Centres Level 1 Clare : Kilrush Limerick County: Abbeyfeale North Tipperary: Roserea Level 2 Clare: Ennistymon, Killaloe/Ballina and Scarriff Limerick County: Adare, Kilmallock and Rathkeale North Tipperary: Ballina/Killaloe and Templemore
Tier 4	Neighbourhood Centres	Small Towns and Village Centres* Level 1: Small Towns Level 2: Village Centres
Tier 5	Local / Corner Shops	Local / Corner Shops: Smaller villages/crossroads – rural shops (post offices, creameries, public houses, petrol filling stations etc)
<p>Notes: The two levels within Tiers 2, 3 and 4 of the hierarchy reflects the different functions and potential of centres within each tier. Those in Tiers 1, 2 and 3 are identified as the main centres within the Regional Retail Hierarchy. The designation of centres within Tiers 4 and 5 is a matter for individual local planning authorities in the Region to determine in their retail strategies and development plan variations.</p> <p>* Small Towns and Village Centres are all those below the 1,500 population threshold set for Tier 4 centres in the RPG hierarchy.</p> <p>Source: Retail Strategy for the Mid West Region, 2002 – 2011 (February 2003)</p>		

- 2.21 The 2003 Retail Strategy for the Mid West Region identified a broad assessment of retail floorspace for the Mid West for the period 2002 – 2011. Its findings are summarised in **Table 2.8**.

Table 2.8 2003 Retail Strategy Floorspace Need: Summary of Results

Indicative Net Floorspace Capacity – Mid West (Sq M Net)				
Time Period	Convenience Goods		Comparison Goods	
	Low	High	Low	High
2002 – 2006	10,600	13,300	47,900	55,100
2007 – 2011	14,900	18,600	51,900	61,100
Total	25,500	31,900	99,800	116,200

- 2.22 It concluded that there will be substantial amounts of expenditure within the Mid West to support both existing convenience goods and comparison goods floorspace, and also significant levels of new floorspace. The 2003 Retail Strategy also determined the retail hierarchy for the region.
- 2.23 The emphasis of the 2003 Retail Strategy was on providing guidance on the location and scale of major retail development. It did not seek to inhibit small scale development in centres around the region, particularly that which contributes to achieving a better mix of convenience/ comparison goods shopping.
- 2.24 The Strategy considered Limerick Metropolitan Area, comprising the City Centre and those parts of Counties Limerick and Clare covered by the urban area, as a single entity. Whilst priority was given to the City Centre, the strategy concluded that there were no readily deliverable major opportunities either in or on the edge of the City Centre. Accordingly in the period up to early post 2007, the majority of new retail floorspace would have to be located in the city's environs if the Metropolitan Area's role and importance was to be sustained.
- 2.25 Elsewhere in Limerick County, the 2003 Strategy considered that there was significant potential given the relatively limited retail offer that existed. It concluded that there was a need to strengthen the quality and quantum of convenience goods and comparison goods floorspace in the main centres and that first priority should be given to Newcastle West. The priority to Newcastle West should not, however, prejudice delivery of new convenience, comparison or mixed use developments in other Level 3 and 4 centres around the County.

- 2.26 In County Clare, the 2003 Retail Strategy recommended that the focus of new large scale development should be in Ennis and Shannon, their importance being recognised in their designation as a hub and linked gateway respectively in the National Spatial Strategy. Again the priority afforded to these two centres should not inhibit further appropriate scale of development in Killrush or other lower order centres. As Clare is predominantly a rural county, the Strategy stated that it is important that the policy framework encourages retail development and enhancement across the County in accordance with the settlement hierarchy.
- 2.27 In North Tipperary the 2003 Strategy recommended that priority must be given to sustaining and diversifying the offer of the key centres, with priority given to Nenagh and Thurles, as both serve specific geographic areas. In parallel there is a need to enhance the retail offer of Roscrea. All of these centres face issues in respect of delivering appropriate sized and located sites in their town centres before 2006. However, there is potential in the longer term provided there is commitment to site assembly. In the interim it would be appropriate to identify edge and out of centre sites, particularly in Nenagh and Thurles.

Conclusions in Relation to the Review

- 2.28 The population of the Mid West has grown less quickly than projected by the 2003 Retail Strategy, whilst the increase in consumer retail expenditure per head has also been lower than forecast. As a result, the 2003 Strategy clearly over-estimated the growth in available consumer retail expenditure (demand) which, in turn, led to an over-estimate of the level of additional retail floorspace need through to 2006 and 2011.
- 2.29 In relation to retail floorspace supply, the 2003 Retail Strategy assumed that the Mid West Region as a whole (and each County) was trading at a retail equilibrium level; in other words, the retail floorspace stock within each County was achieving a benchmark sales density. In reality, of course, this is very unlikely to be the case. Accordingly, there is no way of telling whether there was too little, or too much, retail floorspace in the Mid West Region in 2003, relative to available consumer retail expenditure. This over-simplification is rectified in the new Retail Strategy, where the current scale and pattern of over and under-trading is estimated for each major centre and County, and for the region as a whole, and this is taken into account in the quantification of the need for any additional retail floorspace.

- 2.30 Given that the 2003 Retail Strategy assumed retail equilibrium at the base year, it is difficult to be certain as to whether the retail floorspace need estimates for 2002-2011 were realistic, setting aside the other differences in out turn forecasts against assumptions. What can be derived is that the 2003 Retail Strategy forecast a need for an additional 58,500 to 68,400 sq m net of retail floorspace within the region by 2006, rising to between 125,300 to 148,400 sq m net at 2011 (non cumulative). As stated above, these are likely to have been over-estimates. The 2003 need forecasts compare to the 266,000 sq m net of additional retail floorspace stock that has **already** been built within the region since 2002. Clearly supply has well exceeded demand over the past seven years and combined with the effects of the economic downturn this is now being reflected in rising levels of vacant units (up from 6% to 16% of the regional floorspace stock) and the slow down in the construction of a number of major shopping centre developments, particularly in the Limerick area.
- 2.31 The 2003 Retail Strategy set out a detailed shopping hierarchy for the Mid West,¹ which reflected the Mid West Regional Planning Guidelines (RPG's). The adoption of the Regional Planning Guidelines reinforced this hierarchy and has encouraged growth in housing and economic development into these key towns – building up critical mass. The revision of the 2003 Retail Strategy provides a clear opportunity to build on the work previously undertaken; to re-visit shopping patterns, and to take account of the very latest research, data and forecasts.

¹ See Retail Strategy for the Mid West Region, 2002-2011, Table 5.1.

3.0 RETAIL MARKET REVIEW

Introduction

- 3.1 This section examines the current state of the retail market in the Mid West Region. Following a description of the economic context to the region's retail sector, this section reviews changes to the market since the adoption of the 2003 Retail Strategy, identifies new trends in retailing and highlights the key issues impacting upon current and future levels of retail activity. An assessment is also made of the changing retail floorspace stock of the Mid West Region.
- 3.2 The section addresses the following topics:-
- economic context;
 - retail overview of the Mid West;
 - characteristics of retail supply and demand;
 - other forms of shopping;
 - assessment of retail floorspace stock;
 - the retail development pipeline;
 - conclusions.
- 3.3 Reviewing the key characteristics and requirements of the retail market is important, whilst gaining a clear understanding of how the sector is likely to evolve over the coming years helps inform the new Retail Strategy for the Mid West.

Economic Context

- 3.4 From the adoption of the previous Retail Strategy in 2003 through to the end of 2007 the levels of economic growth experienced in Ireland and the Mid West Region had been significant. This growth was underpinned by high levels of EU and private foreign investment, a social partnership approach to economic development and a rapidly expanding labour force. During this period Ireland's GDP increased from €150.6 million to €188.0 million, a rise of almost 25%¹ at constant market prices in just four years. Reflecting this national economic expansion total

¹ CSO National Income and Expenditure, Annual Results for 2007, 30 June 2008.

disposable income per person rose in the Mid West from €17,485 in 2003 to €20,050 in 2006 (up 15%), but continued to stand at 3% below the national average.¹

- 3.5 During the four years following the adoption of the previous Retail Strategy, Ireland experienced considerable economic growth. However, the impact of the credit crunch on the important construction sector and the global slowdown resulted in a sharp slowdown in 2008. *Oxford Economics*, who provide the consumer retail expenditure per head estimates and forecasts for the quantitative retail floorspace need assessment, expect a 4.2% fall in GDP this year, before a modest recovery in 2010.²
- 3.6 The turn around from a decade or more of rapid and robust economic growth to one of economic decline has been swift and severe. Moreover, any recovery is forecast to be slow and fragile in the short term and is likely to be followed by much more modest growth than experienced in the decade prior to 2007. For example, whilst annual GDP growth averaged 7.3% between 1995 and 2007, *Oxford Economics* expect it to fall by more than 4% during 2008/09,² to be followed by average growth between 2009 and 2020 of just 3.6% - less than half the 1995-2007 rate. Thus the economic context to the new Retail Strategy – economic decline followed by only modest growth – is completely different to the rapid economic expansion which provided the background to the previous Strategy.
- 3.7 The severity of the national economic decline has had a quick and significant negative impact on the retail sector. Experian estimate footfall has fallen by around 20% over the past 12 months as consumers reign in their shopping expenditure due to rising unemployment, falling pay, declining house prices (the wealth effect) and an increase in the VAT rate from 21% to 21.5% introduced by the Government late last year. As a result, it is not surprising that CSO data shows retail sales to have fallen by 17% between 2008 Q1 and 2009 Q1, which in turn has had a depressing effect on retail sales densities. Running parallel to all of this, the Euro has strengthened considerably against the pound, which has encouraged many consumers to

¹ CSO County Incomes and Regional GDP, 2006, 24 February 2009.

² *Oxford Economics* forecasts for this report were prepared in March, 2009. Since then the Irish economy has weakened further and more recent forecasts by ESRI and others are for an even bigger fall in Irish GDP this year. However, over the full term of the new Retail Strategy there are unlikely to be material differences between the OE and later forecasts, particularly in relation to consumer retail expenditure growth.

cross over the border to Northern Ireland to do their shopping. Retailers' sales are therefore being squeezed whilst many components of their cost base (eg. rent) continue to remain high. As a result, retail costs as a proportion of retail turnover is growing, which is impacting upon store viability in an increasing number of instances. The outlook for the retail sector over the next year or two is therefore very difficult.

- 3.8 The impact of much lower levels of forecast economic growth for the Mid West Region is that if new retail development continues to be unrestricted then the effect on existing city and town centres will become increasingly detrimental. For this reason, the new Retail Strategy sets out a series of key retail planning tests which should help Councils better control the location of any new retail investment within the region.
- 3.9 The planning system and the commercial realities of development have to interact but in some instances they may have conflicting interests. To this effect, their interests are mutually inclusive and establishing an appropriate balance is one of the most difficult aspects of retail planning for local authorities.

Retail Market Overview

Limerick City Centre

- 3.10 In the shopping hierarchy of the region, Limerick City Centre is in Tier 1. Compared to other provincial cities – in particular, Galway and Cork - the retail offer is sub-standard. Although the city centre has two good department stores, Brown Thomas and Debenhams, both are too small, and whilst general stores such as Dunnes and Penneys are present, Limerick is missing a number of other key footfall drivers such as TK Maxx and Marks & Spencer. However, with its relatively strong anchor presence, it is surprising that the overall comparison offer is not broader. One explanation is a shortage of suitable properties to attract additional retailers. The existing primary shopping area covers the northern end of O'Connell Street running into Patrick Street and Cruises Street, Bedford Row and William Street. There is a major scheme planned at Patrick Street/Charlotte's Quay, which is located at the edge of the existing retail core. It is subject to on-going planning applications, part of which would entail the demolition of a number of Georgian town houses in relatively poor condition. Discussions are also

proceeding in relation to a major riverside site bounded by Dunnes, Debenhams, Penneys, Arthur's Quay and the town park on the Quay.

- 3.11 Rent levels in prime locations in Limerick City Centre in late 2007/early 2008 were in the range of €160 - €200 psf Zone A. (In the Crescent Shopping Centre there was evidence of €200 - €220 psf in 2008). This compared to Galway at €280 - €320 psf Zone A; €370- €410 psf Zone A in Cork and in Dublin, Zone A's in Grafton Street of €850 - €880 psf and Henry street €600 - €650 psf. It should be noted, however, that these rent levels do not pertain in 2009 due to the lack of primary evidence (new lettings) and lack of settlements at rent review (almost all reviews currently being sent to arbitration). In general, due to the economic downturn, it is likely that rental levels are now lower than those quoted above.
- 3.12 Although Galway and Limerick have similar sized markets, Limerick's primary market (or core market) is larger. Limerick should therefore be achieving sales densities at least as high as Galway's, but in practice they are estimated to be 25-30% lower. Compared to Cork City Centre, Limerick's sales densities may be as much as 33-37% lower.
- 3.13 The footfall figures show that Limerick's prime shopping street, O'Connell Street has an average footfall of 3,000 per hour compared to Galway's Shop Street of 5,000 per hour and Cork's St Patrick Street of almost 6,000 per hour. This compares to footfall figures on Dublin's prime shopping streets of Grafton Street and Henry Street of 12,000 and 11,000 respectively. One would expect the footfall in Limerick City Centre to be on par with the city centres of Cork and Galway.
- 3.14 Under the National Spatial Strategy (NSS) 2002 – 2020, Limerick is a designated national level Gateway City. The NSS policies filter into the Regional Planning Guidelines to provide more detailed regional guidance supporting planning authorities in framing County, City and Local Area Development plans. The on-going regeneration and revitalization of Limerick City Centre plays an important role in the NSS.
- 3.15 The importance of retailing to the future vitality of the city centre can't be underestimated. There is a constant threat from new out-of-town, edge-of-town and suburban centres, which are attractive to shoppers. With the urban expansion that has occurred over a number of years, these competitor centres are more accessible, with cheap and easy-to-use parking and

increasingly carry very competitive retail offers. The improving road network around Limerick as a whole, with ring roads and motorway connections, will bring more shoppers to Limerick, but favour the suburban and edge of town centres more than the city centre. It is important that there is a concerted and co-ordinated approach to retail planning between the relevant planning authorities to ensure that all the present efforts to stimulate retail regeneration of the city centre are successful, giving rise to a strong and vibrant city serving the Mid West Region.

- 3.16 If redundancy of the city centre retail stock continues, mainly due to lack of suitability, investment and over provision of retail in the suburbs, it will weaken the overall retail mix, diversity and depth of the retail offer. This will accelerate the deterioration until it reaches the 'tipping point'. The result could be the city centre shopping imploding on itself as a retail centre of excellence and it could take many years to recover, perhaps never regaining its premier position in the regional hierarchy.
- 3.17 In order to attract 'new blood' to the Limerick city centre retail mix, it is essential to provide the framework to accommodate the scale of retailing with the type of desirable retail spaces that leading retailers will demand.
- 3.18 Conservation issues and retaining the character of the city streets has caused challenges and difficulties in terms of providing functional and attractive shopping space with the 'critical mass' to attract a congregation of major multiple retailers to the city centre. Although there have been a number of improvements in the city centre in recent years, such as the new pedestrianised street-scape at Bedford Row, complementing the older Cruises Street, the problem is neither has the critical mass nor the anchor stores to create that quantity of footfall and excitement that a strong retail quarter needs. A more comprehensive city centre scheme is needed to prevent further erosion of the city centre's retail position, and to stimulate wider regeneration of the city centre as a whole. A new scheme should be of sufficient scale to add real depth and quality to the established retail core.
- 3.19 Limerick City is the regional capital and has the advantage of a large working population employed in the professions, public services, financial and banking sectors, and retail itself, as well as all the visitors from the regional catchment arriving to transact commercial business. With added attractions such as the Hunt museum, St John's Castle and St John's Church, plus the world famous Shannon River, Limerick City Centre should be an important destination for

tourist shopping. Any new retail development in the city centre is therefore likely to be underpinned by a combination of resident, worker and tourist retail expenditure.

The Crescent Shopping Centre

- 3.20 The Crescent Shopping Centre was established in the mid 1980's. Since then it has grown significantly and now functions as a major retail destination in direct competition with the City Centre. It enjoys a strategic and accessible location with its combination of comparison and convenience offer and attracts custom from a wide catchment area. It has eroded the city centre's market share with an increasingly competitive tenant mix. The road networks, particularly the South Ring Road which is nearing completion, including the tunnel connecting under the Shannon to Ennis Road, are likely to make the centre even more accessible in the future to an even wider catchment area. Planning appeals issued in July 2009 refused permission for a further extension to the Centre as it would have created a regional shopping destination within three kilometres of Limerick City Centre to the detriment of the vitality and viability of the City Centre; and because the proposed extension would result in increased, serious traffic congestion.

Other Suburban Centres

- 3.21 Outside of Limerick City Centre, there are a number of other suburban centres, some located in the older areas of the city, which function as district centres serving a local population, principally for convenience goods, but capturing some lower order comparison goods spend as well. A number of the more recent developments were perhaps over ambitious in attempting to provide a large comparison goods offer and now suffer from high levels of voids. This was due to a combination of inadequate market research by the promoters as to what the real market potential was and what type of centre was needed to maximize that potential market share, plus poor coordination between various Councils of the region, which occasionally caused unnecessary competition for development.
- 3.22 A degree of flexibility should be allowed by planners to facilitate the revitalisation of some of these tired and uncompetitive suburban centres. Perhaps they could be 're-invented' into a different format, to serve a local community in a more sustainable way.

Ennis

- 3.23 Ennis is the administrative and commercial capital of County Clare. The county population has now reached approximately 110,000. However, the natural shopping catchment area of Ennis is smaller than this due to the retail influence of Galway (to the north) and Limerick (to the south). The town of Ennis (and its suburbs) now has a population of almost 30,000 – a growth of 10% since 2002 and an increase of 38% since 1996. It is currently the sixth largest provincial town in Ireland. There are many smaller towns and villages mainly to the east and west of Ennis which also look to Ennis for their shopping needs. These towns and villages make up the core market of about 60,000 people. The town retains a strong share of the spend within this core market with its strong convenience offer and a reasonable range of comparison goods stores including Dunnes, Penney's, a number of 'high street' multiples and many independently owned shops. Outside of its core market, however, the influence of Ennis will always be relatively low, due to the greater retail attraction of the two much larger competing cities, Limerick and Galway.
- 3.24 The town centre revolves around the O'Connell Street/Abbey Street/Parnell Street. All in all, Ennis is trading well in its market, although it has started to show some voids, both in O'Connell Street and Abbey Street and adjoining streets. Ennis has a number of atmospheric squares, old market areas and other retail pockets adjoining the traditional high street which contain an attractive mix of cafés, bars, restaurants, speciality and independent fashion boutiques. These retail areas are attractive to both residents living within its natural catchment area and also to the large numbers of tourists which visit County Clare each year.
- 3.25 Sales densities within the town appear relatively healthy, due in part to the small size of many of the town centre's shops. Although trading well and a popular draw for shoppers, there is nevertheless scope to further improve the retail offer and attractiveness of Ennis. It is essential that any additions to the retail stock are 'bolted' on to the existing shopping fabric, rather than located nearer the edge of the town where it would be in competition with the town centre. If the traffic management would allow, the town centre would benefit from full pedestrianisation to show off its traditional style shop fronts to best advantage, encourage a heavier footfall and some additions to the town centre mix. There are a number of leading retailers who have been unable to find larger and more functional spaces in the town centre. It is important to retain the attractive traditional street profile, but a more flexible approach to planning would allow the

introduction of bigger shops (eg. through amalgamation of units) to provide the cleaner spaces and taller floor to ceiling heights currently sought by modern retailers.

Shannon

- 3.26 Shannon has a town population of around 9,000. In addition, there are an estimated 8,000 working population in the Shannon Free Enterprise Zone, a substantial number of which are commuters.
- 3.27 The town's influence is mainly confined to a core market area of about 30,000 people. The demand is principally for daily shopping including food and other convenience goods plus lower order comparison goods such as day to day fashion wear, specialty goods and a measure of durable goods.
- 3.28 The main shopping provision is at Shannon Skycourt. This started out in the 1970's as a purpose built town shopping centre of about 6,500 sq m which has been redeveloped and extended in recent years to meet a growing population and a larger spend. It was hoped the regenerated Skycourt would function as a proper town centre with a blend of convenience, modest comparison and retail service uses. One of the anchors has closed and the number of comparison shops (mostly independents) has significantly reduced over the years as a result of the increasing competition from the City Centre and Crescent in Limerick and to a lesser extent from Ennis. Planning permission has been granted for a large commercial development to the north of Airport Way including retail warehousing, shops and a discount foodstore.
- 3.29 The potential for a significant amount of additional comparison goods shopping is low. It is unrealistic to expect a big rise in market share of comparison spend to be retained in Shannon. Inevitably comparison expenditure will continue to flow to nearby Limerick City Centre with its much larger offer. The additional convenience goods sales generated by the growing commuting workforce are unlikely to be significant, since these workers will carry out much of their shopping in areas close to where they live. Moreover, Limerick City Centre has the potential to improve its market share in the future with a broader retail offer, especially if existing retail proposals come forward for development.

- 3.30 There is a master plan in place, adopted as part of the South Clare Local Action Plan, setting out the framework for the long term development of a new town centre located in a core area linked to the existing shopping precinct in Shannon. With the improved shopping offer in Limerick City and suburbs, and to a lesser extent in Ennis, it is important that the character and scale of the development is focused on the real market potential. Broadly, it should comprise a mix of shopping that encourages 'walk to' and 'daily' shopping - mainly a food and convenience offer – with a carefully chosen and balanced range of comparison shops. In addition, it is important that it functions as a town centre with attendant commercial uses and encourages leisure uses and a restaurant/café offer to act as a meeting place as well as a shopping place. Ideally it should emulate the character of an older established medium size provincial town.
- 3.31 Provided any future scheme is not overambitious in trying to corner too much market share from its main competitors, it would seem well positioned for its essential market comprising the town's population and substantial local work force.

Other Smaller Towns in the Mid West

- 3.32 The last 20 years have seen a major decline in the retail offer in many smaller towns throughout the country, including those in the Mid West. Many of these changes have been strongly influenced by changing consumer demand and shopping habits, such as increased shopper mobility and improved road networks allied to better retail offer in the main cities. The small towns in the Mid West do not have big enough catchment areas to sustain higher order comparison goods shopping and have to re-invent themselves as 'daily shopping' venues encompassing uses such as convenience, speciality and retail services. With the right tenant mix providing a varied and attractive retail offer - fresh food shops, supermarkets, chemists, florists, book shops, wine shops, newsagents, dry cleaners, coffee shops, tea rooms, bars, restaurants and tourist shops - these towns can attract growing numbers of shoppers seeking accessible and innovative options close to where they live.
- 3.33 Many of the town centres have retained their architectural and historical integrity and it is only a short step to improving the retail offer, by gearing it more to 'daily shopping', focused on the local market, which is essentially where the spend will come from. The loyalty that will develop from dealing with local shop-keepers can be significant and creates a vibrant shopping

environment. Typical of the upgrading would be the disappearance of a surfeit of chip shops and Chinese take-aways to be replaced by coffee shops, tea rooms and local style restaurants. In one respect the fast food business is improving in that most of it is provided through food delivery businesses which are high quality and virtually nuisance free and with top class standards of hygiene and environmental awareness.

Characteristics of Retail Supply and Demand

- 3.34 During the 1990's and 2000's there was an upsurge of new entrants to the Irish retail market mainly from the UK, but also from Europe and the USA. The trend has been towards larger retail spaces; whereas 100 – 200 sq m units were common in the early 1990's, by the mid 2000's retailers were demanding more efficient stores of between 250 sq m – 400 sq m. Major retailers such as Top Shop, TK Maxx, Next, Zara etc. generally seek stores of 2,000 sq m or more.
- 3.35 The trend had also been for these larger retailers to locate to major edge of town/out of town locations because of difficulties securing suitably large units in the city and town centres. In addition, it became increasingly difficult to find suitable spaces at realistic rent levels. Hence the trend for retailers to want to locate in retail parks where they could find spaces required at 'comfortable' rent levels. Throughout the country – and particularly outside the Greater Dublin Area - it had become apparent by late 2007 that rents sought in shopping centres and high streets had reached unsustainable levels, where sales had stopped increasing due to a stall in retail consumption combined with a huge increase in supply of retail space outstripping demand from retailers.
- 3.36 Retailer demand has now hit an all time low as the credit crunch continues to bite. With the exception of "value driven" retailers, existing retailers taking larger stores and new entrants to the market, there is an extremely low demand for additional space at the present time. Many retailers are taking advantage of poor market conditions and are driving hard bargains. A number of leading retailers, both Irish and UK based, have gone into examinership or administration.
- 3.37 The most vulnerable retail sector has been in household goods and durables, which encompasses furniture, furnishings and DIY, all of which are linked to the depressed housing

market. A number of leading durable goods retailers have already closed and many more operators are in serious trouble. As a result, vacancy is increasing in the shopping centres and high streets of the Mid West, whilst the retail parks are also experiencing rising voids levels. Even the leading retailers have pulled back from expansion programmes. Tesco has mothballed a number of intended new stores around the country. Dunnes has also closed a number of stores including a large 4,600 sq m store at Sarsfield Street in Limerick City Centre. M&S, Next, Inditex (Zara) have all put expansion on hold for at least a year. A number of major schemes located on the edge of Limerick City are in trouble. For example, Coonagh Cross appears to have been temporarily mothballed with only Tesco opening for trade, whilst construction has slowed at a partially built Parkway Valley. In addition, the proposed extension to Castletroy has not been implemented and the Jetland and Crescent Shopping Centres have lost some traders.

- 3.38 There had been a dramatic rise in retail spend from the mid 1990's up to the end of 2007. However, the credit crunch has brought this growth to an end and retail expenditure per head is currently falling. As at mid 2009 it is difficult to predict when the financial crisis will end. What is more certain, however, is that when the situation stabilizes – which could take some time - there will be slow but steady recovery in retail consumption (and hence in the retail property market) over a sustained period of around 10 years. The current correction in the market affords the opportunity to reassess the entire mechanics of the Mid West retail market and the role its individual segments play in that market, including the correction of past mistakes and a re-balancing, where necessary.

Other Forms of Retailing

Retail Outlets

- 3.39 The concept of retail outlets (also known as Factory Outlet Centres) is relatively new in Ireland. Retail outlet centres are essentially out of town shopping centres, often styled as pedestrianized villages with parking around the perimeters, that generally sell discounted fashion and speciality goods. It is a formula that has been successful on the continent and in the UK, but only works successfully on a regional or even national basis.

Retail Parks

- 3.40 Retail warehouses have developed mainly over the last 15 years and are now established throughout the country. Retail warehousing was expected principally to cater for car borne traffic that was purchasing bulky comparison goods (either large individual goods or goods purchased in bulk), necessitating private transport. It was perceived almost as a panacea for clearing congested town centres, making way for better (non-bulky) comparison goods shops and preventing an outflow of spend from the various towns. However, with the onset of economic recession occupier demand for retail warehouse units has fallen significantly. Hence there is a number of partly vacant retail parks located on the edge of towns in the Mid West, especially around Limerick City.
- 3.41 In Limerick, the successful retail parks in the future will be those that are most accessible and have attracted leading 'bulky goods' traders in locations close to the motorway and the almost completed south western ring road. In addition, these parks are close to the largest population concentrations.
- 3.42 In the Limerick City suburbs there are a number of older retail parks, often conversions from industrial uses, which no longer have competitive tenant mixes and are not as accessible. A number of these may have to adapt and re-invent themselves.
- 3.43 Market forces will take care of a lot of this change, but there is a case for the public sector to create a more flexible framework to allow uncompetitive retail parks to reinvent themselves for other uses such as discount centres, provided of course those uses don't have an adverse affect on the viability and vitality of city and town centres. Where there are no controls over the ranges of goods which can be sold from these units, the temptation for owners will be to transform them into large units selling non-bulky comparison goods which will compete directly with city and town centres. If there are no controls, it may, however, not be possible to prevent this through the planning system.

Assessment of Retail Floorspace Stock***The Current Stock of Retail Floorspace***

- 3.44 Reflecting the evolving retail market in the Mid West, the region has experienced a considerable amount of new retail development since the previous Retail Strategy. **Table 3.1** shows the scale of the increase in stock disaggregated by category of goods.

Table 3.1 Retail Floorspace Stock in the Mid West (Sq M Net)

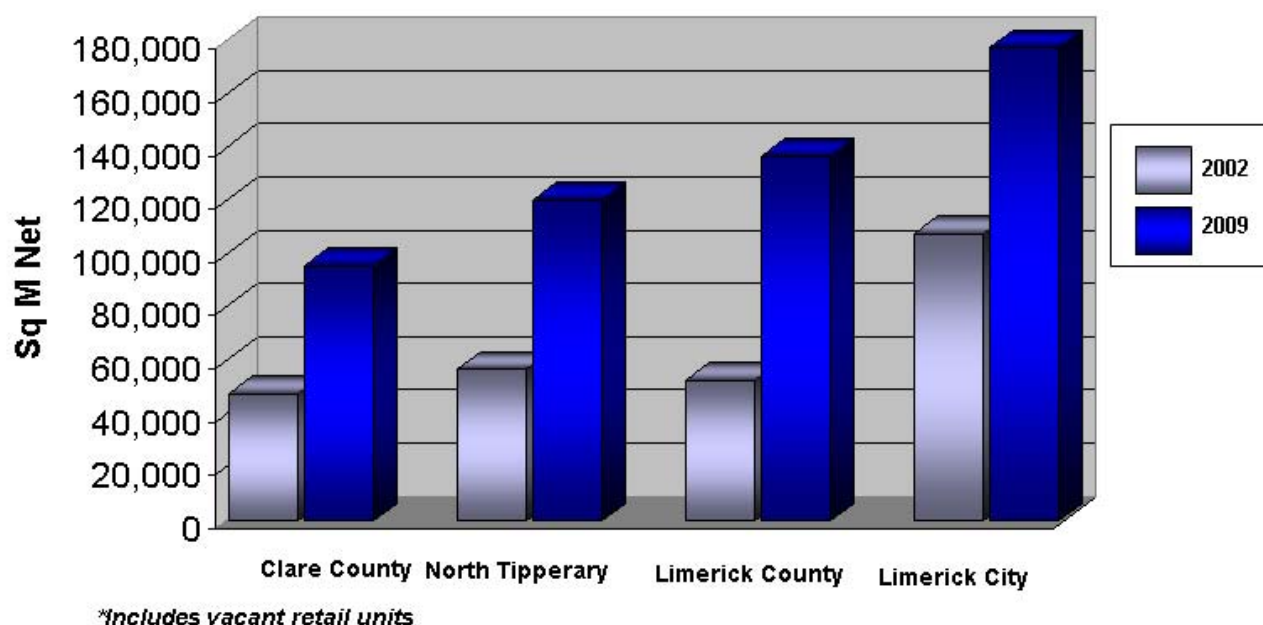
Year	Convenience Goods	Non-Bulky Comparison Goods	Bulky comparison Goods	All Retail Goods	Vacant Retail Floorspace	Total Stock
2002	72,586	146,270	31,555	250,411	15,872	266,283
Additions 2002-09	60,640	32,741	102,487	195,868	—	—
Existing Mar 2009	133,226	179,011	134,042	446,279	85,735	532,014

Source: DTZ Sherry FitzGerald Floorspace Survey, December 2009 and Councils/Colliers CRE floorspace figures and estimates, 2009.

- 3.45 Since 2002, it is estimated that the retail floorspace stock of the Mid West (including voids) has doubled from 266,283 sq m net to 532,014 sq m net. However, the gains have not been uniform across the goods categories. Bulky comparison goods has experienced by far the biggest percentage growth in occupied floorspace at 325% (up 102,487 sq m net), followed by convenience goods at 84% (up 60,640 sq m net). In contrast, occupied non-bulky comparison goods floorspace has risen by just 32,741 sq m net since 2002, equating to an increase of only 22%.
- 3.46 Similarly, the additions to retail floorspace stock in the Mid West have not been the same across the four Council areas. In both absolute terms and as a percentage, Limerick County has seen the biggest gain – up 84,259 sq m net or 159%. Next in terms of floorspace gain is Limerick City – up 69,787 sq m net - but this represents an increase of only 64%, less than half

the rate of Limerick County. North Tipperary's retail floorspace stock has risen by 63,678 sq m net since 2002, equating to an uplift of 111%. Although Clare County has experienced the smallest absolute increase in stock at "only" 48,008 sq m net, this nevertheless represents a doubling of retail provision in just seven years. **Figure 3.1** shows the change in retail floorspace between 2002 and 2009 by Council area.

Figure 3.1 Retail Floorspace Stock by Council Area, 2002 and 2009*



3.47 Overall, Limerick City has accounted for 26% of the gain in retail floorspace stock within the Mid West since 2002, whilst the shares for Limerick County, North Tipperary and Clare County are 32%, 24% and 18% respectively.

3.48 The retail floorspace figures for Limerick City, however, mask huge variations in the relative contributions of Limerick City Centre and the rest of the City. The data indicates that the retail floorspace stock of Limerick City Centre – the regional centre – has, in fact, fallen from an estimated 94,733 sq m net in 2002¹ to 91,548 sq m net today, whilst the total for the rest of the City has increased from 13,482 sq m net to 81,454 sq m net. The changing share of the Mid West's retail floorspace stock by area is summarised in **Table 3.2** overleaf.

¹ This figure is derived by adding together the floorspace figures for Limerick City and the Arthurs Quay Shopping Centre as estimated by DTZ Sherry FitzGerald in December, 2001.

**Table 3.2 Change in Share of the Mid West's Retail Floorspace Stock by
Council Area, 2002 and 2009***

Council Area	Share of All Retail Floorspace (Col.%)	
	2002	2009
Limerick City (City Centre only)	40 (36)	33 (17)
Limerick County	20	26
Clare County	18	18
North Tipperary	22	23
Mid West	100	100

**Includes vacant retail floorspace.*

- 3.49 The data shows that Limerick County's share of all retail floorspace has increased from 20% to 26% since 2002. Virtually all of this gain in share is due to large-scale retail additions in the Limerick urban area. As a result the shares for the other three Council areas have either fallen or remained flat, with Limerick City's share declining the most from 40% to only 33% over the seven year period. However, these figures mask huge differences within the City itself; since 2002 the city centre's share of the region's total retail floorspace stock has fallen from 36% to just 17%, whereas retail floorspace in the rest of the City has grown as a share of the Mid West total from 4% to 16%. It is this rapid expansion of floorspace in the rest of the City and in the urban area falling within Limerick County that has contributed to the current under-performance of the Limerick City Centre retail economy.

Vacant Retail Floorspace

- 3.50 Lastly, it is noteworthy to examine the change in vacant retail floorspace across the Mid West since the previous Retail Strategy. In 2002, there was just 15,872 sq m net of vacant retail property, representing 6% of the Mid West's total retail floorspace stock. In comparison empty retail units now total some 85,735 sq m net, which is 16% of the region's total stock. To put this level of vacancy into some kind of context, there is now 22% more vacant retail floorspace

in the Mid West than the entire stock of occupied retail units in Limerick City Centre. **Table 3.3** summarises the distribution of vacant retail floorspace by Council area in 2002 and 2009.

Table 3.3 Vacant Retail Floorspace in the Mid West Region by Council Area, 2002 and 2009

Council Area	2002		2009	
	Sq M Net	Col %	Sq M Net	Col %
Limerick City	6,807	43	33,650	39
Limerick County	4,832	30	15,450	18
North Tipperary	1,437	9	24,564	29
Clare County	2,795	18	12,071	14
Mid West Total	15,872	100	85,735	100

Source: DTZ Sherry FitzGerald Floorspace Survey, December 2001 and Councils/Colliers CRE floorspace figures and estimates, 2009.

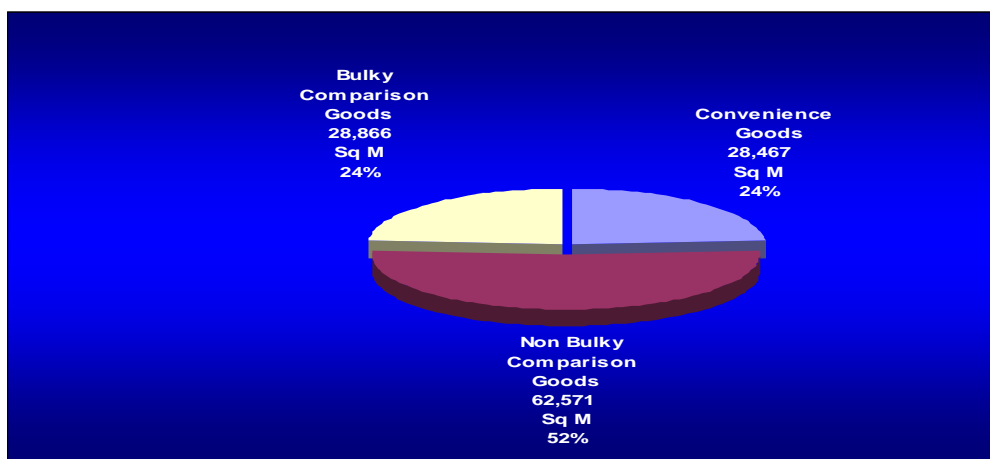
The Retail Development Pipeline

3.51 The full retail development pipeline¹ in the Mid West (as at March 2009), assuming 100% completion, would represent a 23% addition to the current stock; this equates to a potential gain of 119,904 sq m net on a present regional total of 532,014 sq m net (including voids). By Council area the development pipeline represents the following proportions of existing stock: Limerick County (30%), North Tipperary (26%), Clare County (24%) and Limerick City (14%). To set the overall scale of the retail development pipeline in context, it equates to:-

- almost double the existing retail trading floorspace of Limerick City Centre;
- almost one and a half times the current total retail trading floorspace of Clare County;
- four Crescent Shopping Centres.

3.52 In terms of category of goods, more than half of the Mid West's retail development pipeline is in non-bulky comparison goods, with the balance shared between bulky comparison goods and convenience goods. The floorspace allocation by category of goods is summarised in **Figure 3.2**.

Figure 3.2 Mid West Retail Development Pipeline by Category of Goods, as at March 2009 (Sq M Net)



3.53 From the schedule of permissions granted, it is difficult to determine those schemes that will proceed to construction, particularly in an uncertain economic climate. Evidence on the ground suggests a number of schemes which were under-construction appear to have been 'moth-balled', whilst others remain un-started. Moreover, many schemes, particularly the larger ones, can be the subject of a number of revising applications which often change the scale and mix of a scheme numerous times before completion. For these reasons, we present two sets of retail floorspace need results (in Section 5) as follows:-

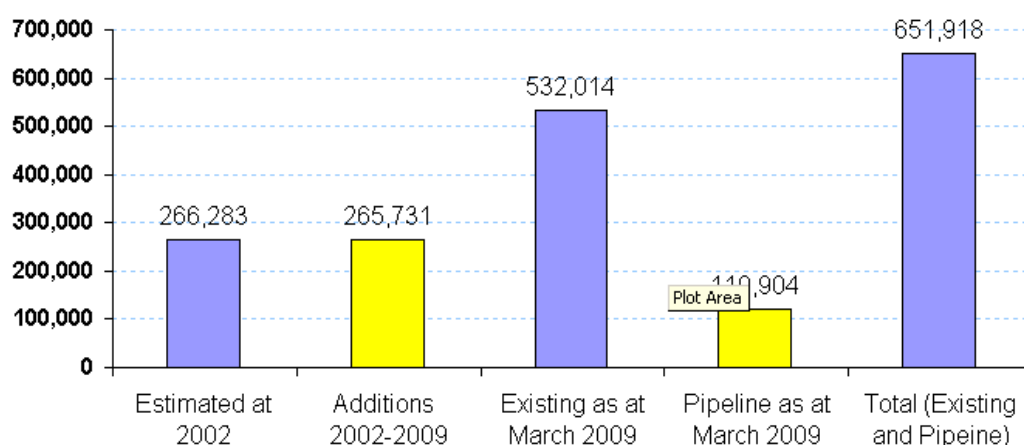
- retail floorspace need **before** deductions of retail commitments;
- retail floorspace need **after** deductions of retail commitments.

3.54 **Figure 3.3** overleaf shows how the retail floorspace stock of the Mid West Region has increased since the last Retail Strategy was prepared (2002) and depicts how the pipeline will

¹ Defined as retail development under construction as at March 2009, **plus** schemes with planning consent at that date, but not yet started.

further add to the quantum of shopping provision available. Although the population of the Mid West has grown since 2002 and is forecast to increase further by 2016, the pace of new retail development (recent past, present and pipeline) has perpetuated, and will continue to result in a growing total of retail floorspace provision per person.

Fig. 3.3 The Growing Stock of Retail Floorspace in the Mid West (Sq M Net)*



* Includes vacant retail floorspace.

- 3.55 On our estimates the quantum of retail floorspace per head of population in the Mid West has risen from 0.8 per sq m net in 2002 to 1.4 per sq m net today. Assuming all of the identified retail development pipeline is built by 2016 then the supply will rise further to 1.5 per sq m net per person, despite an expected growth in population of some 48,000 over the next seven years. This would represent almost a doubling in retail provision per person in the Mid West between 2002 and 2016, a period when consumer retail expenditure per person is estimated to rise by only 45% in real terms. Therefore, retail floorspace **supply** (recent past, present and future) is potentially running at almost twice the pace of consumer **demand** (spend). **Table 3.4** overleaf summarises the key data.

Table 3.4 The Changing Retail and Economic Dynamic of the Mid West

Year	Retail Floorspace Stock (Sq M Net Incl. Vacancies)	Population	Floorspace Per Person (Sq M Net)	Estimated Consumer Spend Per Person (€)
2002	266,283 ⁽¹⁾	340,875	0.8	4,719
2009	532,014	374,000	1.4	5,546
2016 ^(F)	651,918 ⁽²⁾	421,779	1.5	6,833
2002-16	+145%	+24%	+88%	+45%

Sources: Colliers CRE, 2003 Retail Strategy and Oxford Economics.

(^F): Forecast).

Notes: ⁽¹⁾ The 2003 Retail Strategy may have under-estimated actual retail floorspace stock.

⁽²⁾ Assumes 100% of existing pipeline is built by 2016; may be viewed as unlikely.

Summary

- 3.56 From the adoption of the 2003 Retail Strategy through to 2007, the Mid West, in line with the rest of the country, was characterised by significant population gains, economic growth, rapidly rising consumer demand and a significant expansion of retail floorspace. The on-set of the credit crunch and the move into economic recession has brought all of these indicators (except rising population) to a sudden halt. The retail market has slowed down considerably, whilst consumer expenditure per head is expected to fall over the next year or so before making only modest gains. Retail schemes granted planning consent and started on site now lie idle, whilst a significant proportion of recently completed floorspace – particularly retail warehousing – is vacant.
- 3.57 In retail terms, it is clear that Limerick City Centre is not only falling behind other leading cities (as demonstrated by its lower prime rent, sales densities and footfall) but is losing its share of retail floorspace and sales in the Mid West. Moreover, the existing retail development pipeline is likely to accentuate the squeeze on Limerick City Centre.

- 3.58 From a market perspective, there is already too much suburban retail development in the Limerick urban area and with very limited retail demand at present this is resulting in high levels of voids. The same also applies in some other areas, but on a much smaller scale. The smaller towns in the region should focus on their real catchments which tend to be relatively concentrated. To service essentially local needs, these centres should cater for 'daily shopping' and offer convenience goods, lower order comparison goods and a range of services.
- 3.59 Planning for the future of retail is an issue of balance and ensuring that access and sustainability remain key components to the overall strategy of delivery and scale. If significant retail over-provision occurs in the Mid West then the impacts are likely to include:-
- the further erosion of Limerick City Centre as a regional retail centre;
 - an increase in the vulnerability of weaker shopping centres in the Limerick urban area and towns throughout the region;
 - economic pressure on more marginal streets in the larger centres; and
 - a general imbalance of retail provision and the loss of retail spatial robustness.
- 3.60 Counterbalanced to this is an awareness of the significant lead-in times to deliver high quality new retail developments, and the importance of forward planning to ensure that in the future – when the economy and the market picks up – the retail sector is not unduly constrained; resulting in less consumer choice and less competition. For this reason, the quantitative assessment of retail need (in Section 5) has been determined for 2022 as well as the end date for the new Retail Strategy of 2016.

4.0 SHOPPING PATTERNS AND EXPENDITURE FLOWS

Introduction

4.1 The main purpose of this section is to quantify shopper behaviour and determine the **present** retail trading performance of:-

- the Mid West Region; and
- each of the four constituent Council areas;

in relation to non-bulky and bulky comparison goods and convenience goods shopping. The catchment area and trade draw pattern of Limerick City Centre for each broad category of goods is also examined.

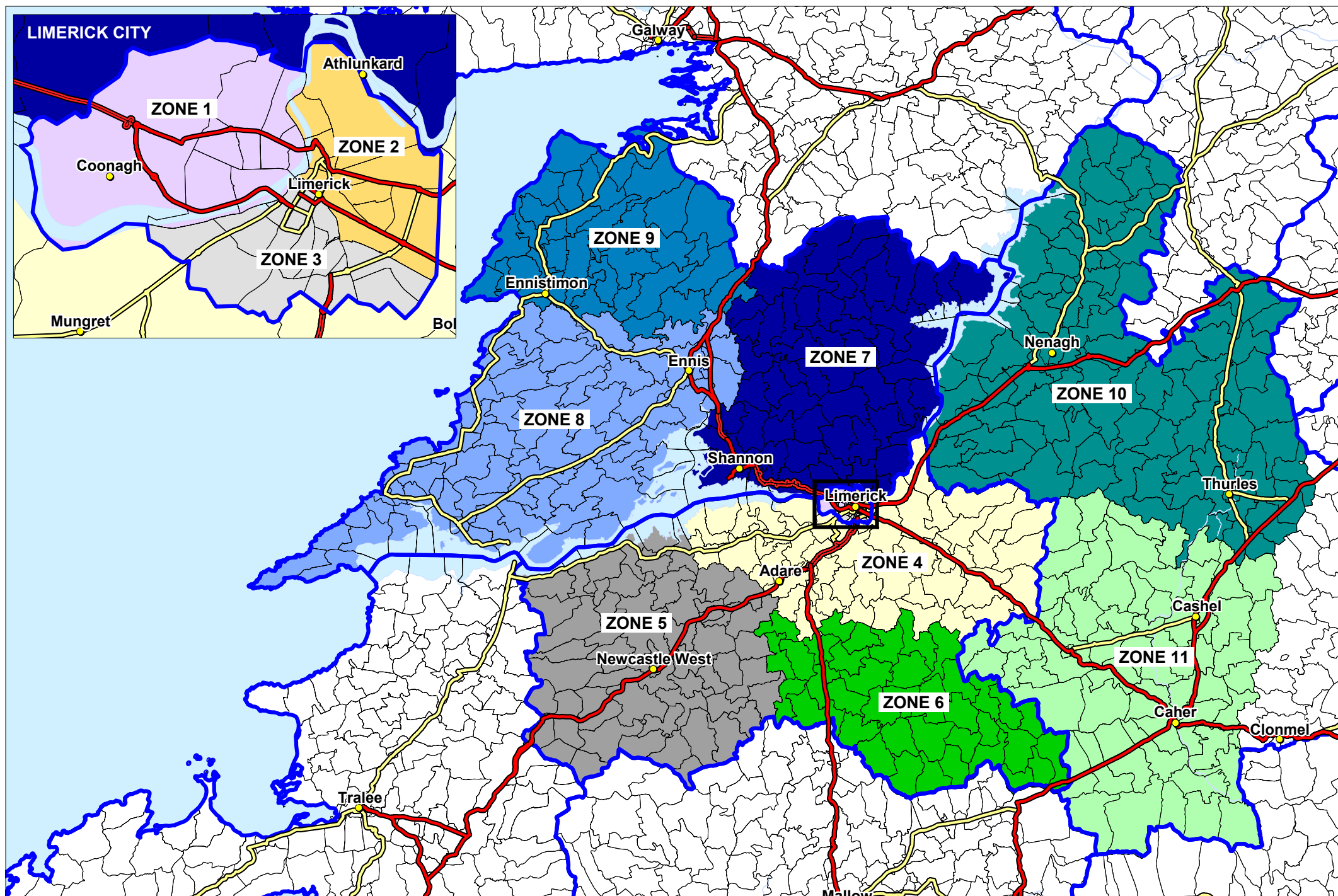
4.2 This assessment draws on the results of a household telephone survey which was carried out between 23 February and 8 March, 2009.

Assessment of the Mid West Retail Economy

4.3 The main objective of the household survey was to obtain comprehensive information on consumer shopping trips patterns and expenditure flows for convenience goods (food) and non-bulky and bulky comparison goods (non-food) shopping within the Mid West Region. For the purposes of the Review, the area was divided into 11 zones (see **Figure 4.1** overleaf). Zones 1 to 10 fall within (and comprise) the Mid West and Zone 11 covers part of its hinterland (and is part of the South East Region).

4.4 Within the survey area as a whole, the catchment areas of the main centres were determined using survey data on retail expenditure patterns. The analysis permits the primary, secondary and tertiary catchments (where they exist) to be determined for each centre. These are defined as follows:-

Fig. 4.1 Definition of Household Telephone Survey Zones



- **primary catchment** - comprising those zones from which a centre attracts the majority of generated expenditure (ie. 51% or more);
- **secondary catchment** - Comprising those remaining zones from which a centre attracts 25% or more of generated expenditure; and
- **tertiary catchment** - comprising all remaining zones from which a centre attracts 5% or more of generated expenditure.

4.5 Beyond the tertiary catchment, the full results show that certain centres may attract even smaller amounts of consumer retail expenditure from additional zones. Such expenditure flows will typically account for low proportions of overall centre turnover and can, for most analytical purposes, be ignored. These zones have therefore been excluded from the definition of a catchment area, although all expenditure flows (as well as expenditure from tourists) are taken into account in the quantitative retail floorspace need assessment in Section 5.

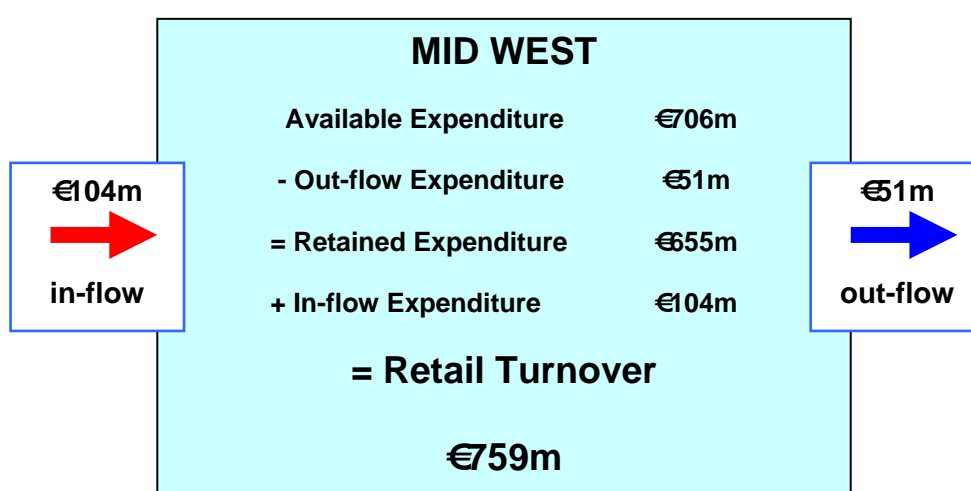
Analysis of Results

- 4.6 Using the results of the household survey, the retail trading performance of the Mid West retail economy as a whole for each of the main categories of goods at the base year of 2009 was assessed. In particular, the volume of consumer retail expenditure in-flows and out-flows to and from the Mid West have been determined.
- 4.7 By relating the scale of these expenditure in-flows and out-flows to the known 'pools' of available expenditure generated within the Mid West, the total retail turnover of the region for each main category of good as at 2009¹ was estimated. In addition, by expressing turnover as a proportion of available expenditure, the levels of expenditure 'retention' have been estimated for the region.

¹ All monetary figures are expressed in constant 2007 prices.

- 4.8 In relation to **non-bulky comparison goods** the household survey indicates that of the €706 million of expenditure generated by the residents of the Mid West (in 2009), some €51 million leaks out to centres outside of the region. (See **Figure 4.2**). Thus the Mid West retains €655 million of its non-bulky comparison goods spend, which equates to a retention rate of 93%. To this total, the Mid West attracts an estimated in-flow of €104 million,¹ which results in an annual non-bulky comparison goods turnover of €759 million.

Fig 4.2: Mid West: Retail Trading Characteristics: Non-Bulky Comparison Goods, 2009

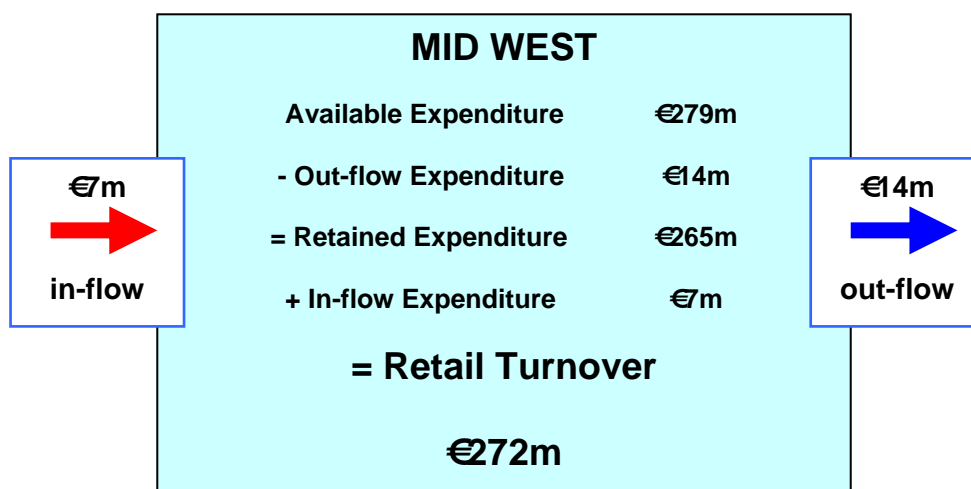


- 4.9 For **bulky comparison goods** the household survey indicates that €14 million of the available spend of €279 million currently leaks out of the Mid West to competing centres. (see **Figure 4.3** overleaf). Thus €265 million of locally generated bulky comparison goods expenditure is retained within the region, equating to a retention rate of 95%. Adding to this an in-flow spend of €7 million² produces an estimated annual bulky comparison goods turnover for the Mid West of €272 million.

¹ This total comprises of (a) €25 million of inflow spend from the survey area (zone 11, outside of the Mid West) and (b) €79 million of in-flow spend from tourists.

² This in-flow spend originates from residents in zone 11 (outside of the Mid West). No in-flow spend is assumed to originate from tourists.

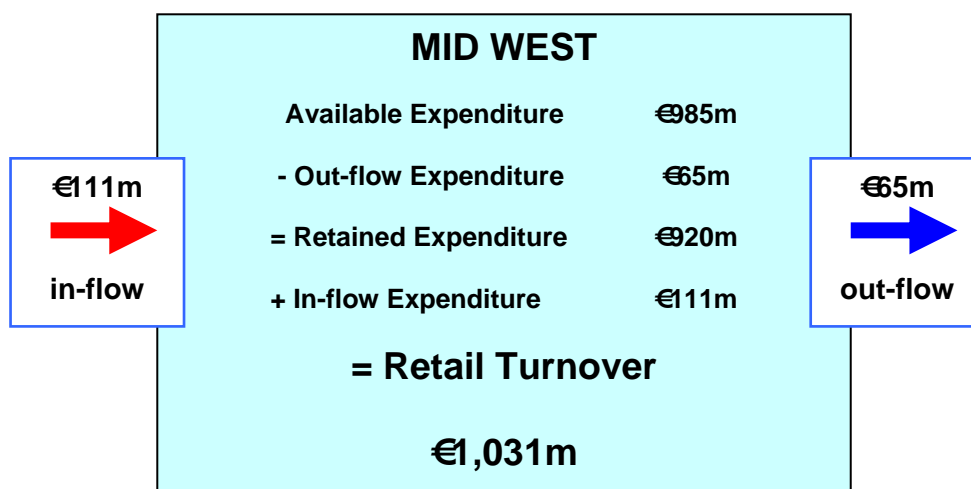
Fig 4.3: Mid West: Retail Characteristics: Bulky Comparison Goods, 2009



- 4.10 **Combining** the non-bulky and bulky comparison goods turnovers indicates that the Mid West has a total comparison goods turnover of €1,031 million. Overall, 93% of all comparison goods expenditure generated by households within the region is spent within the area, whilst 7% leaks out to competitor centres.
- 4.11 This level of expenditure retention for all comparison goods compares to 97% for the Dublin Region and 52% for the Mid East Region as estimated by the Retail Strategy for the Greater Dublin Area, 2008-2016.¹ Thus the overall level of comparison goods shopping provision already available in the Mid West as a whole appears to be sufficient to retain a high proportion of consumer spend, leaving only limited scope to clawback trade in the future.
- 4.12 **Figure 4.4** overleaf summarises the consumer retail expenditure patterns for the Mid West in relation to **all** comparison goods.

¹ Retail Strategy for the Greater Dublin Area, 2008-2016, Regional Planning Guidelines Office and Dublin and Mid East Regional Authorities, July 2008.

Fig 4.4: Mid West: Retail Trading Characteristics: All Comparison Goods, 2009

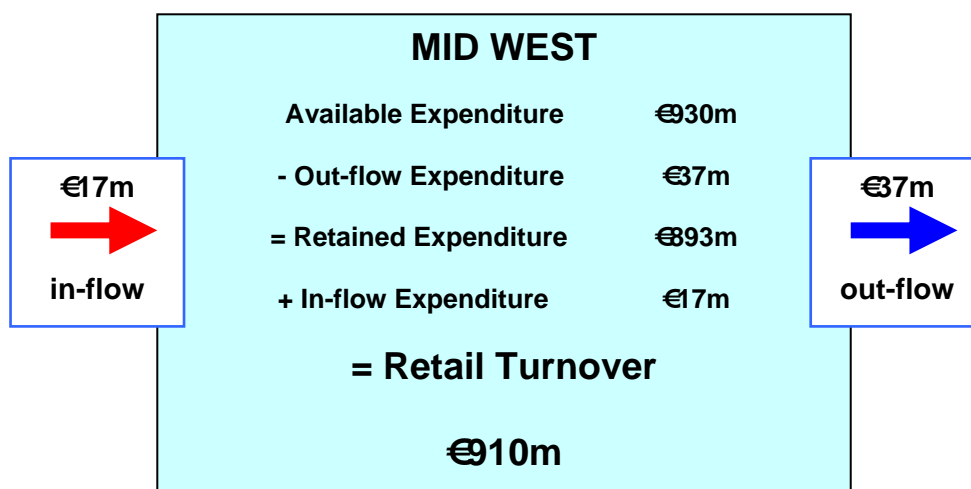


- 4.13 In relation to **convenience goods** (see **Figure 4.5** overleaf), it is estimated that the Mid West currently attracts an estimated in-flow of €17 million,¹ whilst €37 million leaks out to competitor centres/stores in other areas – mainly from zone 6 to zone 11 and to Charleville outside of the survey area. Therefore, the region is a net exporter of €20 million of convenience goods spend. The figures indicates that existing stores in the Mid West retain around 96% of the convenience goods expenditure generated within the area and have an estimated convenience goods turnover of some €910 million.
- 4.14 This level of expenditure retention matches that for the Dublin Region and is far in excess of the 80% estimated for the Mid East Region by the Retail Strategy for The Greater Dublin Area, 2008-2016.² Accordingly, there is almost no potential to clawback consumer spend on convenience goods.

¹ This total comprises of (a) €8 million of in-flow spend from the survey area (zone 11, outside of the Mid West) and (b) €9 million of in-flow spend from tourists.

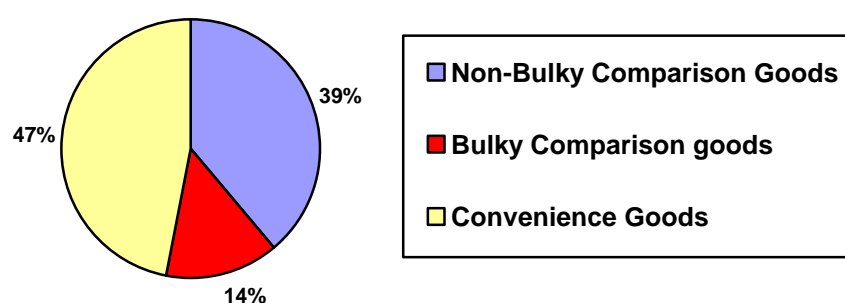
² Retail Strategy for the Greater Dublin Area, 2008-2016, Regional Planning Guidelines Office and Dublin and Mid East Regional Authorities, July 2008.

Fig 4.5: Mid West: Retail Trading Characteristics: Convenience Goods, 2009

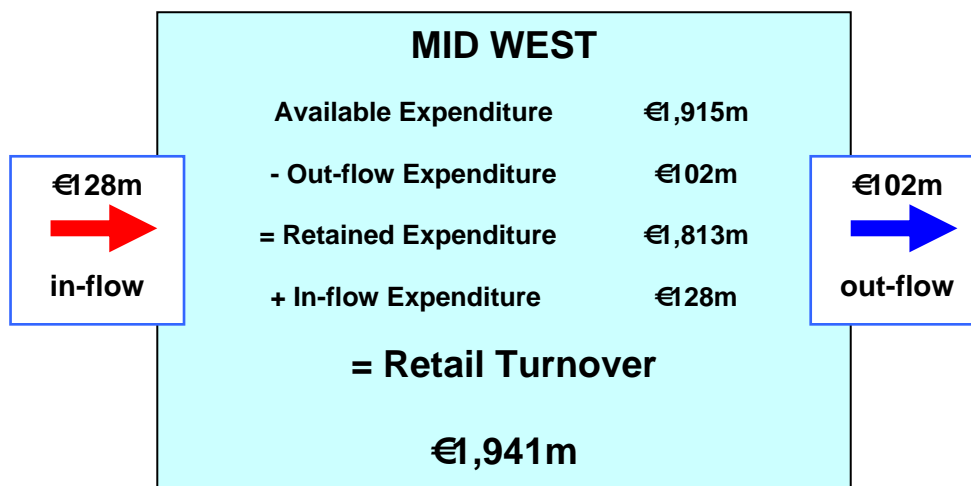


4.15 **Combining** the convenience goods with the non-bulky and bulky comparison goods categories indicates that the Mid West has an estimated **total** retail turnover of €1,941 million, of which 53% relates to comparison goods shopping (39% non-bulky goods and 14% bulky goods), and 47% to convenience goods (see **Figure 4.6**). Overall, 95% or €1,813 million of the total retail expenditure generated by households within the region is spent within the area, whilst 5% or €102 million leaks out to competitor centres. (see **Figure 4.7** overleaf).

Fig 4.6: Mid West: Retail Turnover Disaggregated by Category of Goods, 2009



**Fig 4.7: Mid West: Retail Trading Characteristics: All Goods
(Convenience and All Comparison), 2009**



Retail Trade Patterns by Council Area

- 4.16 The data generated by the household survey also enables retail expenditure patterns to be analysed separately for each of the four constituent Council areas in the Mid West Region and by broad category of goods.

Non-Bulky Comparison Goods

- 4.17 Residents of Limerick City generate €117 million of non-bulky comparison goods expenditure of which €18 million leaks out to other areas. Thus €99 million of spend is retained giving a retention rate of 85%. Adding in expenditure in-flows of €249 million (including tourist spend) produces an estimated turnover of €348 million. Accordingly, the city as a whole is a major net importer of non-bulky comparison goods spend (see **Table 4.1** overleaf).
- 4.18 The remaining three Council areas retain lower proportions of their available non-bulky comparison goods expenditure ranging from 30% in Limerick County to 69% in North Tipperary. These areas, together with Clare County, all generate turnovers lower than their generated spends, and are therefore all net exporters of non-bulky comparison goods expenditure (see **Table 4.1**).

**Table 4.1 Consumer Retail Expenditure Flows by County:
Non-Bulky Comparison Goods (€ Million, 2009)**

Council Area	Available Expenditure	Outflows	% Retained	Retained Expenditure	In-flows	Estimated Turnover	Percentage Net leakage
	A	B	C=A-B/A (X100)	D=A-B	E	F=D+E	G=B-E/A (X100)
Limerick City	117	18	85%	99	249	348	(197%)*
Limerick County	242	169	30%	73	77	150	38%
Clare County	218	94	57%	124	32	156	28%
North Tipperary	130	40	69%	90	15	105	19%

*Brackets indicate net importers

- 4.19 The destination of expenditure leakage for non-bulky comparison goods by Council area is set out in **Table 4.2**. For Limerick City, most of the leakage is to Limerick County, which is consistent with the location of retail facilities in the Limerick suburbs, but outside of the city. In contrast, most of the leakage from Limerick County is to Limerick City, as are the out flows from Clare County. Leakage of spend from North Tipperary is more evenly spread, with broadly similar amounts flowing to Limerick City, Limerick County and to centres outside of the Mid West.

**Table 4.2 Destination of Available Expenditure by Council Area:
Non-Bulky Comparison Goods, 2009**

Council Area	Available Expenditure (€million)	Destination of Generated Expenditure (Row %)					
		Limerick City	Limerick County	Clare County	North Tipperary	Outside Mid West	Total
Limerick City	117	85	12	0	0	3	100
Limerick County	242	60	30	0	0	10	100
Clare County	218	26	12	57	0	5	100
North Tipperary	130	9	11	0	70	10	100

- 4.20 **Table 4.3** quantifies the origin of non-bulky comparison goods turnover by Council area. This analysis demonstrates, for example, that only 28% of Limerick City's turnover originates from its own residents, whilst 42% comes from residents of Limerick County and 16% from Clare County. The remainder originates from North Tipperary (3%) and from people living outside of the Mid West (including tourists) (11%). In comparison, Limerick County gets around half of its non-bulky comparison goods trade from its own residents, whilst the corresponding proportions for Clare County and North Tipperary are higher still at 79% and 85% respectively.

**Table 4.3 Origin of Turnover by Council Area:
Non-Bulky Comparison Goods, 2009**

Council Area	Turnover (€ million)	Origin of Turnover (Row %)					
		Limerick City	Limerick County	Clare County	North Tipperary	Outside Mid West	Total
Limerick City	348	28	42	16	3	11	100
Limerick County	150	9	49	17	9	16	100
Clare County	156	0	0	79	0	21	100
North Tipperary	105	0	0	2	85	13	100

Bulky Comparison Goods

- 4.21 The pattern of trade for bulky comparison goods shopping is summarised in **Table 4.4** overleaf. In broad terms it is similar to that for non-bulky comparison goods. Limerick City is, once again, a big net importer of expenditure, whilst the other three Council areas are net exporters. Levels of expenditure retention for bulky comparison goods are higher than for non-bulky comparison goods in all Council areas except Limerick City. This reflects the more localised provision of retail warehousing facilities compared to the relative concentration of non-bulky comparison goods shopping in a fewer number of bigger centres, particularly Limerick.

**Table 4.4 Consumer Retail Expenditure Flows by County:
Bulky Comparison Goods (€Million, 2009)**

Council Area	Available Expenditure	Outflows	% Retained	Retained Expenditure	In-flows	Estimated Turnover	Percentage Net leakage
	A	B	C=A-B/A (X100)	D=A-B	E	F=D+E	G= B-E/A (X100)
Limerick City	46	9	80%	37	76	113	(146%)*
Limerick County	96	58	40%	38	18	56	42%
Claire County	86	30	65%	56	0	56	35%
North Tipperary	51	7	86%	44	3	47	8%

*Brackets indicate net importers

- 4.22 The distribution of leaked spend for bulky comparison goods is set out in **Table 4.5**. The pattern generally follows that for non-bulky comparison goods; Limerick County captures most of the monies flowing out of Limerick City, whilst the reverse is also true. This reflects the concentration of retail facilities in close proximity to the shared boundary. Limerick City attracts most of the expenditure leakage from Clare County, whilst spend flowing out of North Tipperary is split equally between Limerick City and centres outside of the Mid West.

**Table 4.5 Destination of Available Expenditure by Council Area:
Bulky Comparison Goods, 2009**

Council Area	Available Expenditure (€million)	Destination of Generated Expenditure (Row %)					
		Limerick City	Limerick County	Clare County	North Tipperary	Outside Mid West	Total
Limerick City	46	79	20	0	0	1	100
Limerick County	96	53	39	0	0	8	100
Clare County	86	25	7	64	0	4	100
North Tipperary	51	6	1	0	87	6	100

- 4.23 There is a big variation between the four Council areas in terms of the origin of their bulky comparison goods trade. For example, whilst residents of Limerick City provide only one-third of the city's turnover, the corresponding proportion for Limerick County is over two-thirds, whilst for North Tipperary and Clare County the figures are 93% and 100% respectively. (see **Table 4.6**).

**Table 4.6 Origin of Turnover by Council Area:
Bulky Comparison Goods, 2009**

Council Area	Turnover (€million)	Origin of Turnover (Row %)					
		Limerick City	Limerick County	Clare County	North Tipperary	Outside Mid West	Total
Limerick City	113	33	45	18	3	1	100
Limerick County	56	16	68	11	1	4	100
Clare County	56	0	0	100	0	0	100
North Tipperary	47	0	0	1	93	6	100

Convenience Goods

- 4.24 Turning first to Limerick City, it is estimated that of the €155 million of convenience goods expenditure generated by its residents, some €19 million leaks out to other centres, producing a retained turnover of €136 million (or 88%). Adding in in-flows of €125 million (including tourist spend) generates a turnover for the City as a whole in convenience goods shopping of €261 million (see **Table 4.7** overleaf). Limerick City is therefore a big net importer of convenience goods expenditure.
- 4.25 **Table 4.7** also shows that Limerick County and Clare County retain lower proportions of their convenience goods expenditure at 69% and 79% respectively, whilst both Council areas are net exporters of spend. North Tipperary benefits from the highest level of expenditure retention at 99% and is a modest net importer of convenience goods expenditure. Retention rates for convenience goods shopping are the highest of the goods categories, since food shopping tends to be carried out more frequently, and therefore more locally, than either non-bulky or bulky comparison goods shopping.

**Table 4.7 Consumer Retail Expenditure Flows by County:
Convenience Goods (€Million, 2009)**

Council Area	Available Expenditure	Outflows	% Retained	Retained Expenditure	In-flows	Estimated Turnover	Percentage Net leakage
	A	B	C=A-B/A (X100)	D=A-B	E	F=D+E	G=B-E/A (X100)
Limerick City	155	19	88%	136	125	261	(68%)*
Limerick County	319	98	69%	221	13	234	27%
Claire County	287	60	79%	227	11	238	17%
North Tipperary	171	2	99%	169	9	178	(4%)*

*Brackets indicate net importers

- 4.26 The destination of convenience goods expenditure by Council area is summarised in **Table 4.8**. With retention levels being so high, relatively little monies cross Council boundaries. The biggest flows are from Limerick County and Clare County into Limerick City. These patterns reflect the proximity of large and attractive food stores close to boundaries.

**Table 4.8 Destination of Available Expenditure by Council Area:
Convenience Goods, 2009**

Council Area	Available Expenditure (€million)	Destination of Generated Expenditure (Row %)					
		Limerick City	Limerick County	Clare County	North Tipperary	Outside Mid West	Total
Limerick City	155	88	6	5	0	1	100
Limerick County	319	23	69	0	0	8	100
Clare County	287	18	0	79	0	3	100
North Tipperary	171	0	0	0	99	1	100

- 4.27 The origin of convenience goods turnover by Council area is set out in **Table 4.9** overleaf. The high retention rates are reflected in the fact that 95% or more of the convenience goods trade within Limerick County, Clare County and North Tipperary come from their own residents, whilst for Limerick City the proportion is just 52%, meaning almost half of the convenience

goods sales in the City as a whole are dependent on attracting spend by people living elsewhere.

**Table 4.9 Origin of Turnover by Council Area:
Convenience Goods, 2009**

Council Area	Turnover (€million)	Origin of Turnover (Row %)					
		Limerick City	Limerick County	Clare County	North Tipperary	Outside Mid West	Total
Limerick City	261	52	27	20	0	1	100
Limerick County	234	4	95	0	0	1	100
Clare County	238	3	0	96	0	1	100
North Tipperary	178	0	0	0	95	5	100

- 4.28 A high level of expenditure retention is a key indicator of sustainability as it will assist in reducing the length and number of private journeys. Nevertheless, some expenditure flows do make sense, such as those to Limerick City Centre for non-bulky comparison goods shopping, or to major retail facilities close to Council area boundaries where natural catchments cross boundary lines. As always, achieving the right balance between retention and leakage across all centres (and Council areas) is critical to the success of any strategy for retail, and recognition of these important issues, in association with a range of other factors, such as city and town centre viability and viability, economic trends and quantitative and qualitative need all help to inform the new Retail Strategy for the Mid West which is set out in Section 6.

Centre Dominance

- 4.29 Centres or retail locations which capture the largest single share of available consumer retail expenditure within a zone may be described as being dominant within that area. **Figures 4.8, 4.9 and 4.10** overleaf show centre dominance across the survey area at the base year of 2009 for non-bulky comparison goods, bulky comparison goods and convenience goods respectively. The maps provide a good visual indication of the relative strengths of centres across the Mid West for each category of goods.

Fig. 4.8 Centre Dominance Map: Non-Bulky Comparison Goods

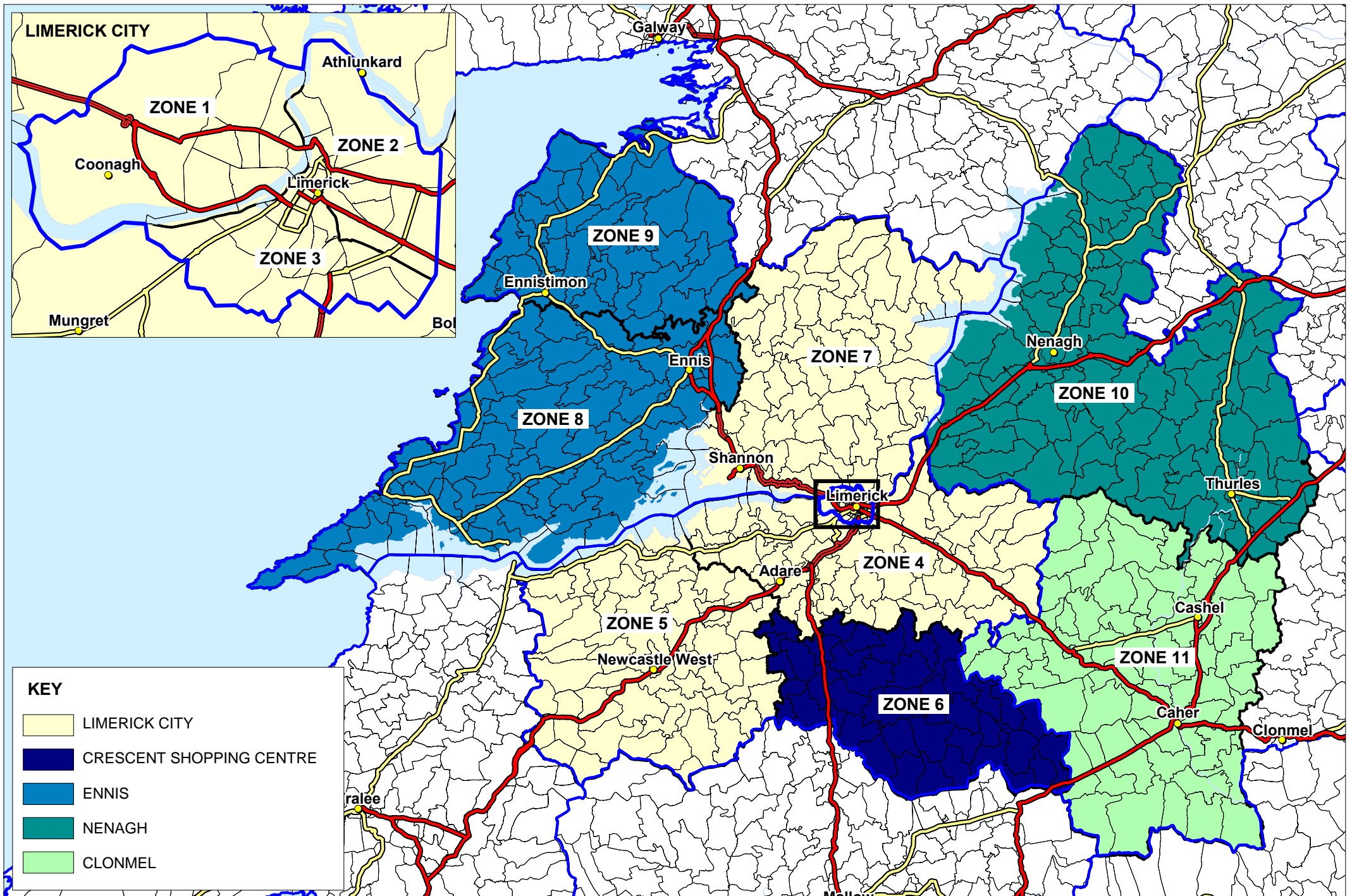


Fig. 4.9 Centre Dominance Map: Bulky Comparison Goods

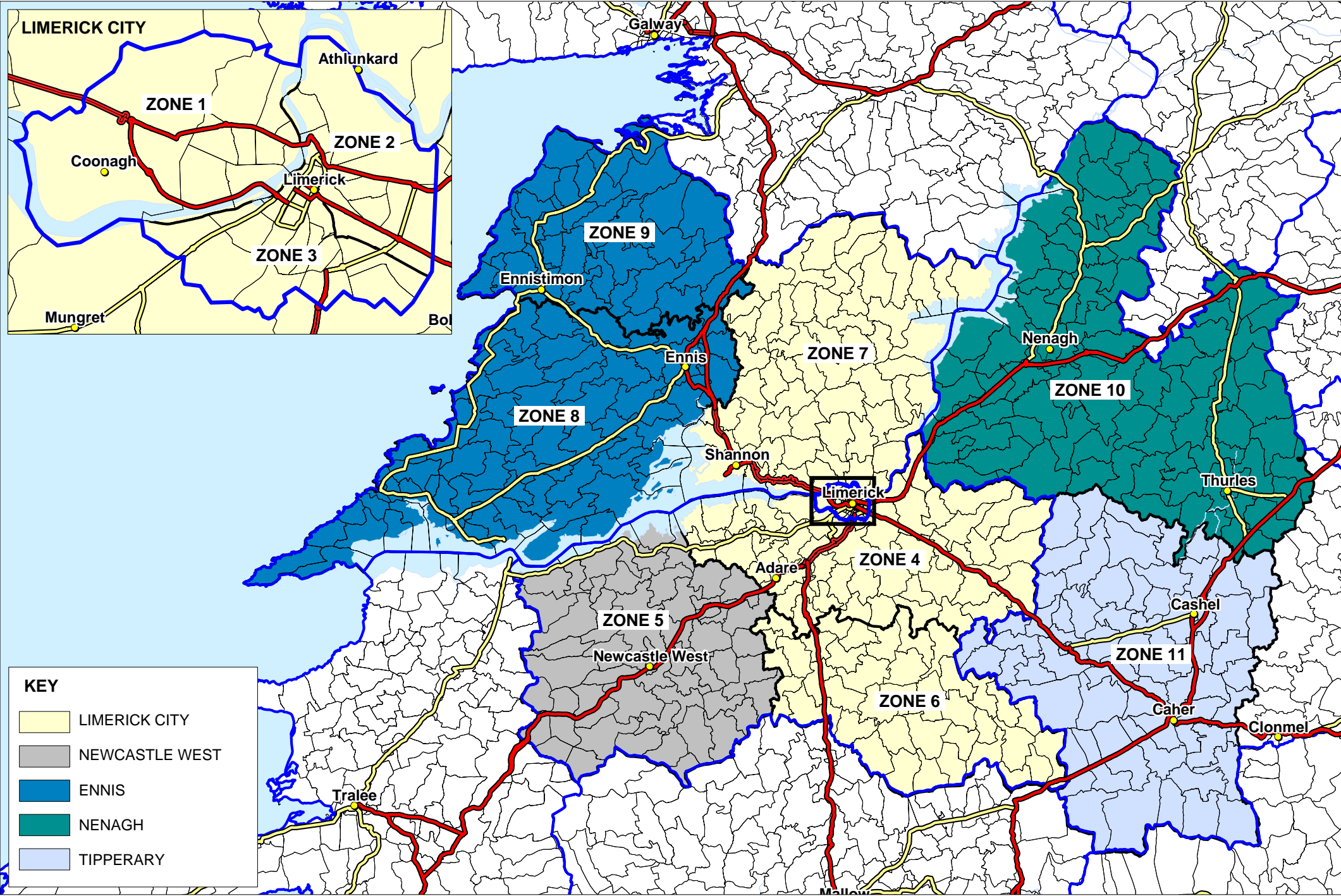
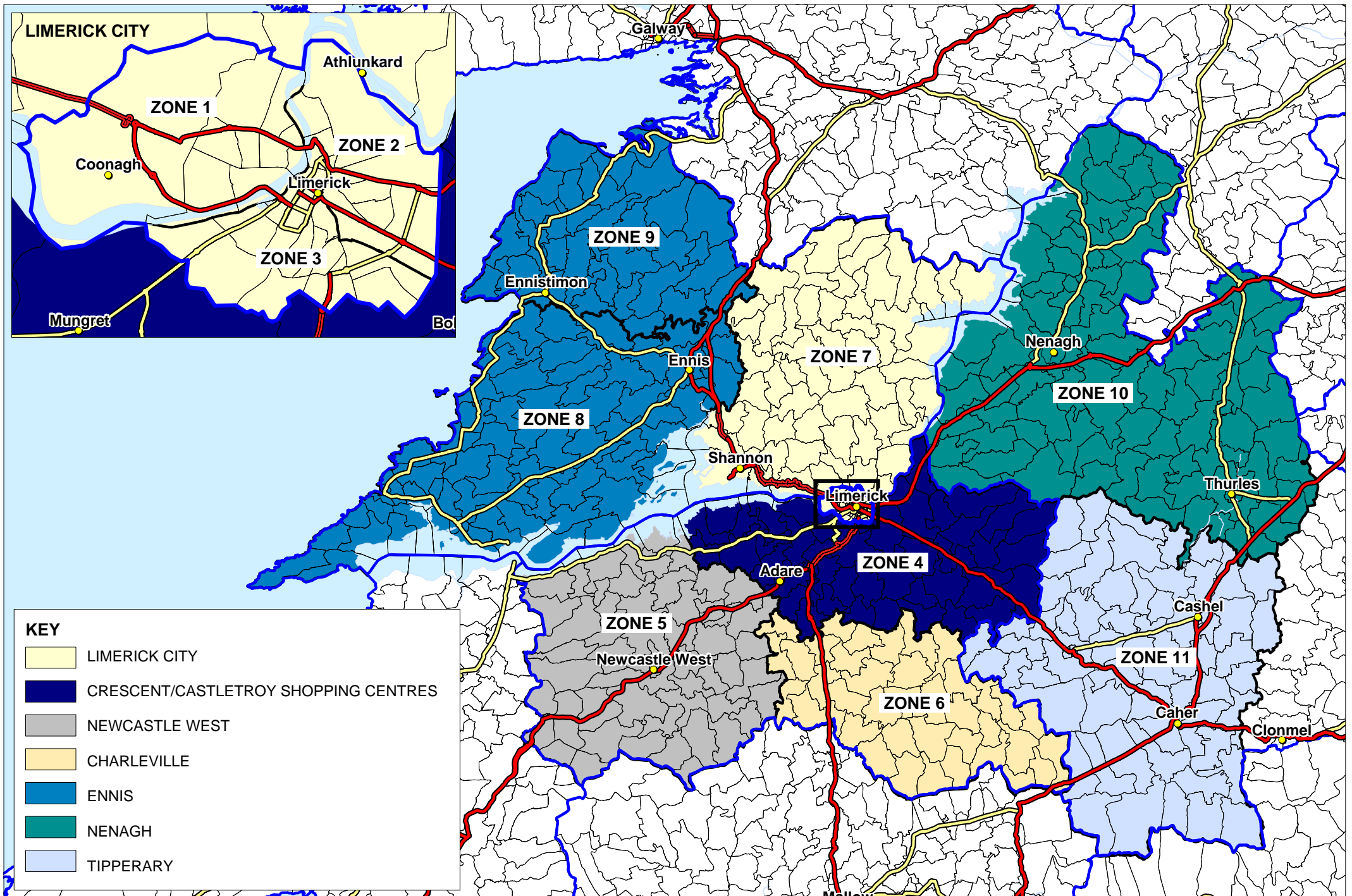


Fig. 4.10 Centre Dominance Map: Convenience Goods



- 4.30 The relative dominance of Limerick (city as a whole) for non-bulky comparison goods is evident from **Figure 4.8**. Nevertheless, its geographical influence is constrained by a number of competitor centres, such as Ennis and Nenagh in Clare County and North Tipperary respectively. However, the Crescent Shopping Centre, although attractive to many shoppers, ranks second to the Limerick City Centre in terms of market share across all zones, except zone 6.
- 4.31 **Figure 4.9** shows centre dominance for bulky comparison goods. This is similar to that for non-bulky comparison goods, although Limerick (city as a whole) now extends into zone 6, but loses out to Newcastle West in zone 5. The Crescent Shopping Centre – being essentially a non-bulky comparison goods centre – is not dominant in any of the 11 survey zones.
- 4.32 The dominance of centres for convenience goods is shown in **Figure 4.10**. Limerick's influence (city as a whole) is now constrained to just four zones – zones 1 to 3 covering the City itself and zone 7 (the area to the north). This reflects the more localised nature of food shopping. Accordingly, it takes seven centres to dominate all 11 zones, compared to just five for non-bulky and bulky comparison goods. The Crescent Shopping Centre dominates zone 4, curtailing Limerick's influence to the south, whilst the largest share of available spend in zone 6 flows out of the Mid West to Charleville, which is located just outside the survey area boundary.

The Catchment Area of Limerick City Centre

- 4.33 For the regional centre of Limerick City Centre, catchment area maps have been drawn in relation to each of the main goods categories using the methodology described at paragraph 4.4. **Figure 4.11** overleaf defines Limerick's catchment for non-bulky comparison goods. The city centre's primary catchment extends across all of the City (zones 1 to 3) and also zones 4 (to the south) and 7 (to the north). In addition, zone 5 (to the south west) forms its secondary catchment. All remaining zones fall within Limerick's tertiary catchment. The relative proximity and attractiveness of Ennis and Nenagh curtail Limerick's influence to the west and east respectively, resulting in the city centre's primary catchment extending more north to south.
- 4.34 **Figure 4.12** overleaf shows Limerick City Centre's bulky comparison goods catchment area. This is much less extensive than for non-bulky comparison goods and covers only seven of the

Fig. 4.11 Limerick City Centre: Catchment Area for Non-Bulky Comparison Goods

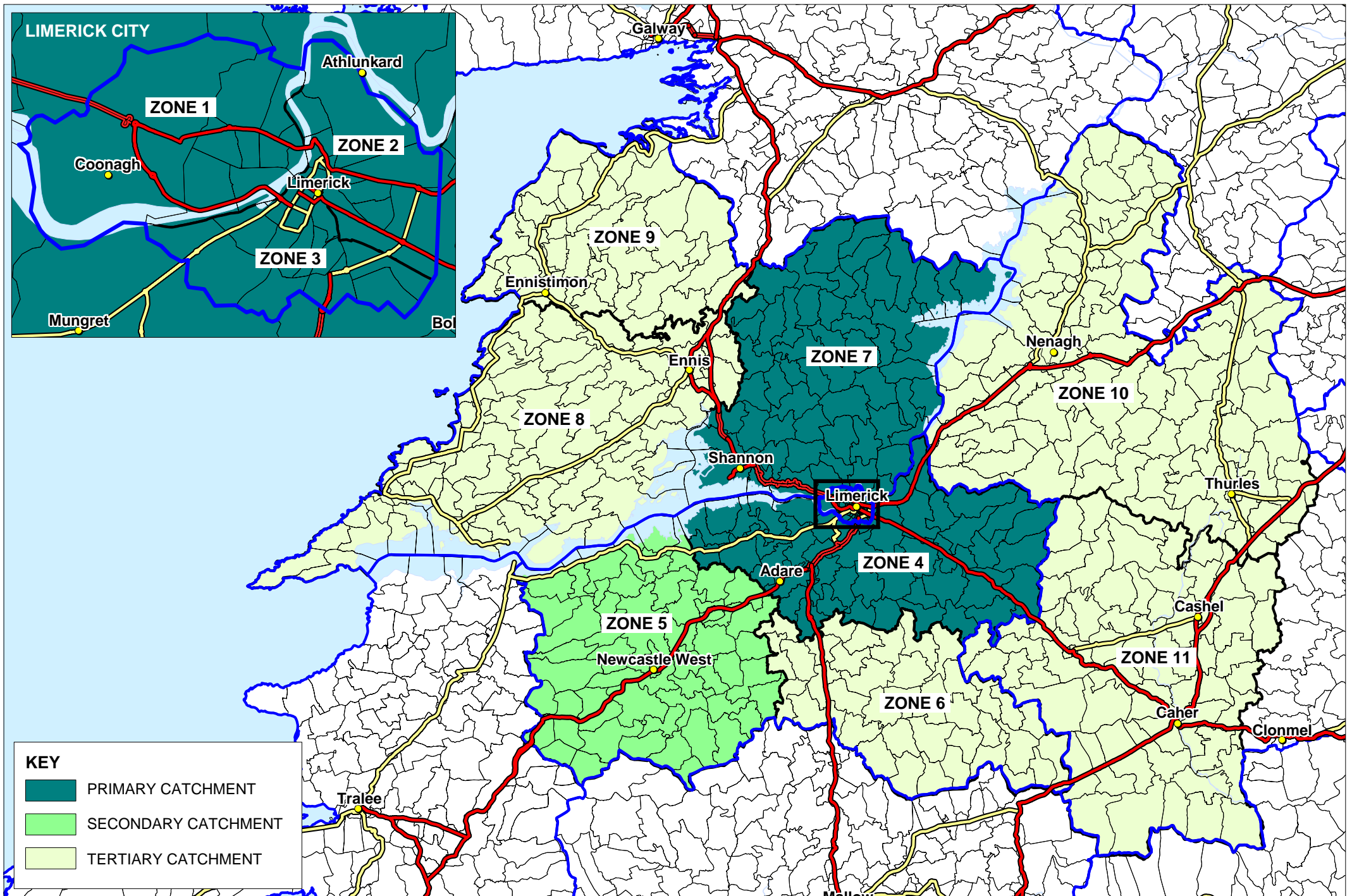
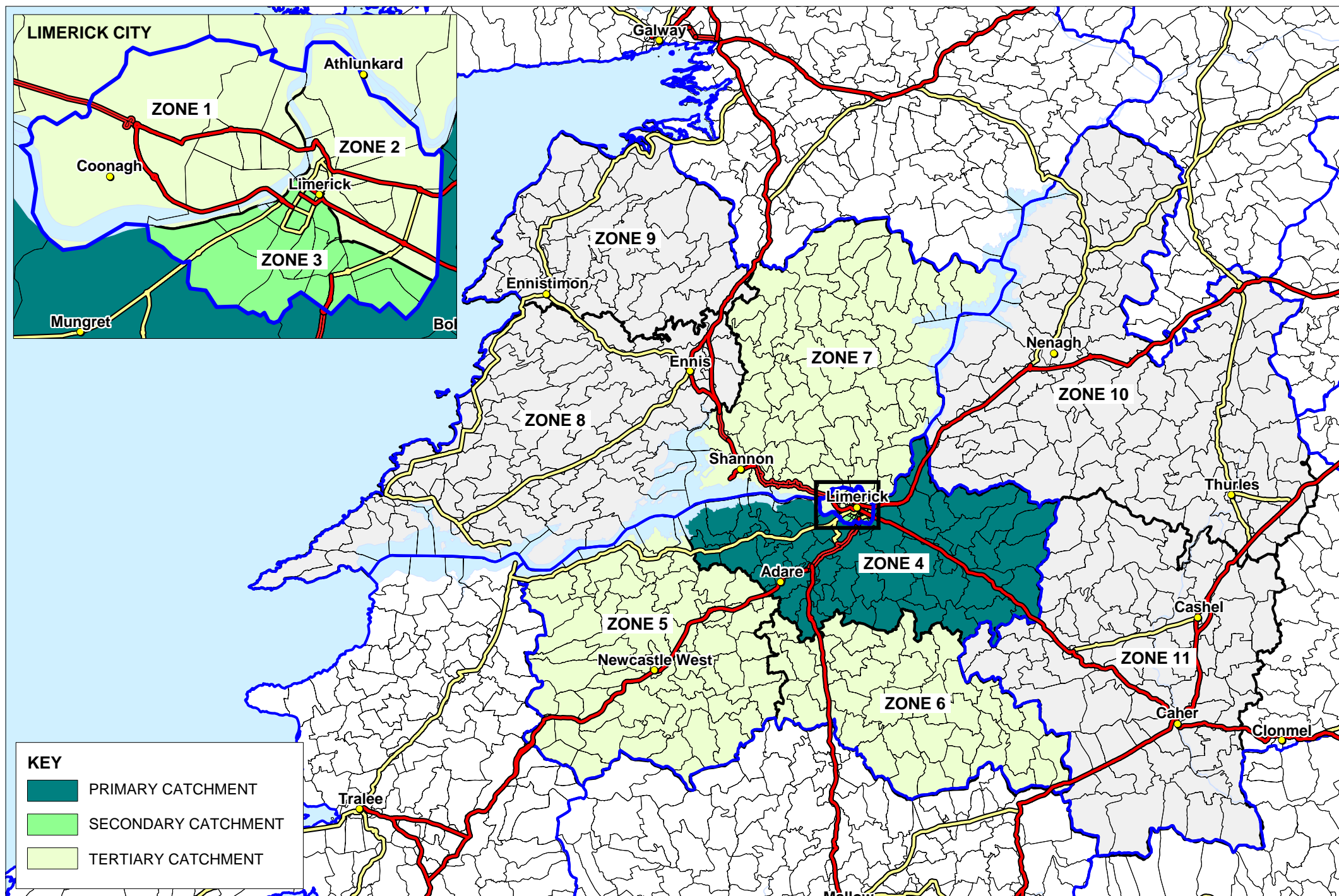


Fig. 4.12 Limerick City Centre: Catchment Area for Bulky Comparison Goods

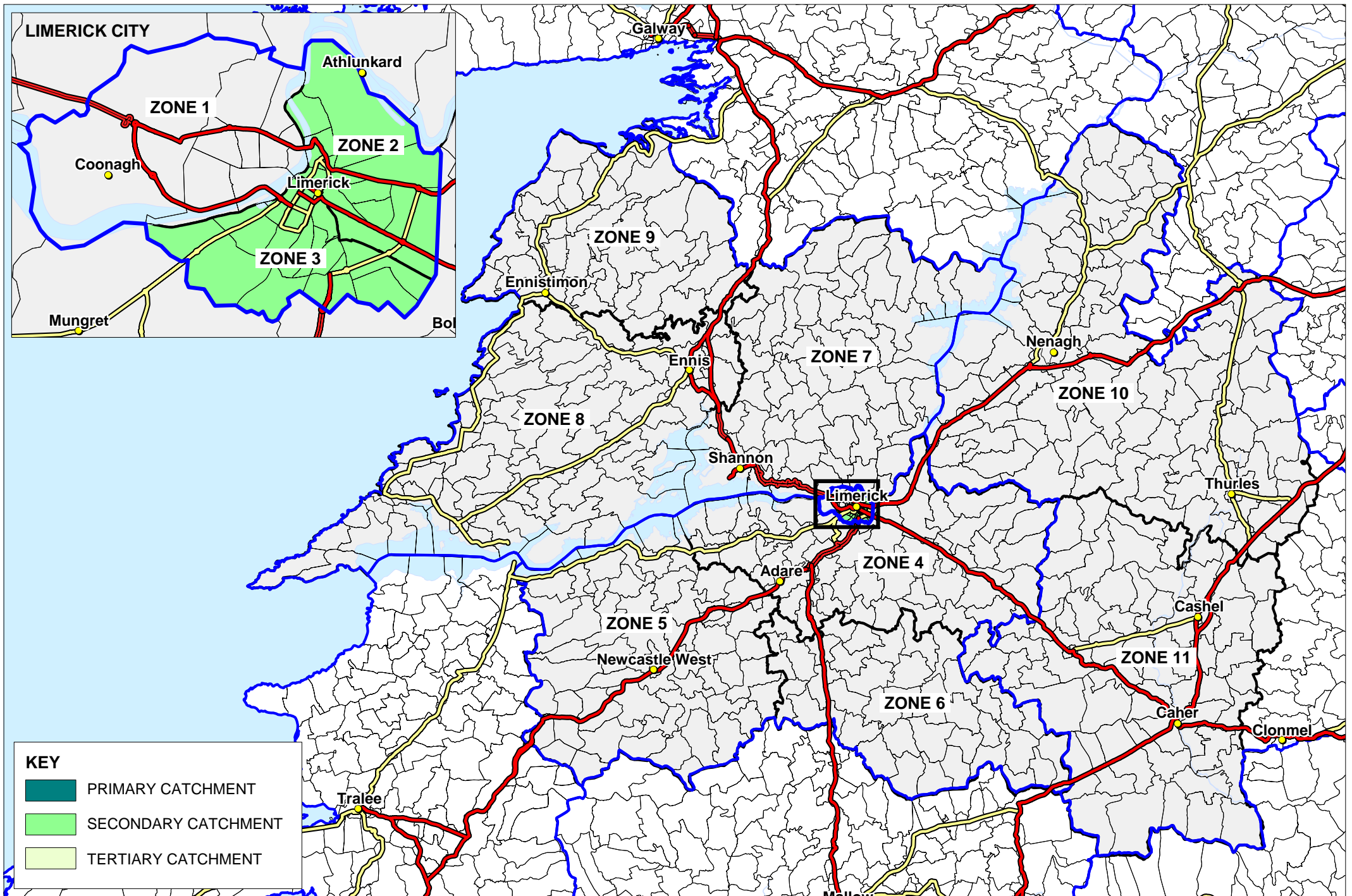


11 zones in total, of which three form its tertiary catchment. **Figure 4.13** overleaf shows the city centre's catchment for convenience goods shopping. Its almost negligible extent reflects the limited food offer available in the city centre, a characteristic typical of larger centres which trade mainly in non-food shopping, and the location of a number of major food superstores throughout the Limerick suburbs.

Summary

- 4.35 Residents of the Mid West will generate €1,915 million of expenditure in 2009 on retail goods of which €1,813 million will be spent in the region's shops. This represents an expenditure retention rate of 95%, implying a very low leakage of just 5%. Accordingly, there is only limited scope to clawback monies leaking out of the region, since there will always be some retail flows to major centres such as Dublin, Cork and Galway.
- 4.36 Thus the main driver of new retail development will be growth in retail spend within the Mid West (a combination of healthy projected population growth and modest real increases in average spend per head) and, for particular centres, if appropriate, clawback of expenditure leakage to other centres within the region leading to an increase in target market share.
- 4.37 The survey evidence – floorspace (supply) and retail spend (demand) – indicates that Limerick City Centre has lost market share since the previous Retail Strategy and is now under-achieving against its role and function in the shopping hierarchy and its historic performance. For all retail goods, the city centre now captures just 20% of the Mid West's retail sales, whilst its share of total available retail floorspace stock is only 17%. This is significantly down on its performance in 2002. Too much trade now flows to the suburban shopping centres and retail parks, which contain an increasing number of comparison goods retailers.

Fig. 4.13 Limerick City Centre: Catchment Area for Convenience Goods



5.0 RETAIL FLOORSPEACE NEED ASSESSMENT

Introduction

- 5.1 This section sets out the approach and results of an assessment to estimate the quantitative need for future additional retail floorspace within the Mid West Region which consists of Limerick City, Limerick County, Clare County and North Tipperary. North Tipperary, although part of the Mid West Region, is **not** part of the new Retail Strategy, and therefore the planning policy recommendations in Section 6, arising in part out of this needs assessment, do not cover North Tipperary. Assessments are carried out separately for non-bulky comparison goods, bulky comparison goods and convenience goods.
- 5.2 The household telephone survey confirms that the existing retail floorspace stock within the Mid West Region already produces very high levels of expenditure retention (and therefore low levels of leakage) across all three broad categories of goods.¹ As a result, it is unrealistic to actively plan to develop more retail floorspace in order to materially increase the region's retention rate for any of the goods categories. Moreover, in relation to convenience goods and bulky comparison goods, there is already a good supply of retail provision across much of the Mid West, whilst evidence from the household survey indicates that many trips for these categories of goods are already undertaken locally at existing retail facilities. For reasons of sustainability, it is considered good practice to provide for these forms of shopping in locations that limit, or reduce, the need to travel over longer distances by car. As such, in quantitative terms, there is no reason to further build-up concentrations of convenience goods and bulky comparison goods shopping provision at specific locations at the expense of others.
- 5.3 It is therefore considered prudent and realistic in carrying out a broad quantitative assessment of future retail floorspace need to adopt what is commonly known as the "constant market shares" approach for **convenience goods** and **bulky comparison goods** shopping. This assumes that the existing (2009) market shares (in terms of available expenditure) of the Mid West, Council areas and centres are held constant through to the design years of 2016 and 2022. As a result, in relation to these two broad categories of goods, the following quantitative assessment provides an indication of the scale and distribution of additional retail floorspace

¹ See Section 4.

that is required (if any) to maintain today's retail order (and relative centre attractiveness) throughout the Mid West. However, in a small number of instances important qualitative considerations may emerge in the future which could lead to a re-distribution of the quantitative retail floorspace need estimates at a local level. This is taken-up again as part of the new Retail Strategy in Section 6.

- 5.4 In relation to **non-bulky comparison** goods, however, it is felt a different approach is required to the quantitative assessment of retail floorspace need, since the household survey and other research undertaken for this study all point to Limerick City Centre, as the designated regional centre, no longer performing to this role and function in the shopping hierarchy. The city centre has failed to materially improve either the quantity or quality of its retail offer since the previous Retail Strategy, whilst new suburban centres and retail parks have opened and existing developments out of centre have extended. In order to meet the objectives of the Councils to strengthen the regional shopping centre, the city centre's market share for non-bulky comparison goods - the category of goods most appropriate to be sold in a large retail destination – is adjusted upwards in 2016 and retained at this higher level through to 2022. The adjustment in market share for Limerick City Centre means the future market shares of other centres and retail parks across the Limerick urban area and elsewhere in the Mid West are reduced to compensate (market shares must add to 100%). In addition, a small reduction is made to the leakage of non-bulky comparison goods spend from the region as a whole.
- 5.5 A base year of 2009 has been adopted for the quantitative assessment, whilst retail need is forecast at 2016 (the end date of the Strategy) and also 2022. All monetary figures in the report are given at **constant 2007 prices and include VAT**. Definitions of which individual types of goods make up the broad categories of non-bulky comparison goods, bulky comparison goods and convenience goods are set out at **Appendix 4B**.
- 5.6 The results of this retail floorspace needs assessment help shape and underpin the Review of the Mid West Retail Strategy which is set out in Section 6.

Approach to Quantifying Retail Floorspace Need

- 5.7 The approach used to estimate future retail floorspace need in the Mid West and its constituent Council areas is a traditional one and is described in full at **Appendix 6A**. The analysis

incorporates the very latest available data and economic forecasts, and the results of a specially commissioned household telephone survey. This should ensure that the assessment is as up to date, comprehensive and robust as possible. The methodology used to estimate non-bulky and bulky comparison goods and convenience goods retail floorspace need may be summarised as a series of steps as follows:-

- Step 1: Calculate Total Available Expenditure in the Survey Area (and constituent zones)** - this is calculated by multiplying resident population by average consumer retail expenditure per head, adjusted to exclude spending by “special forms of trading”.
- Step 2: Application of “Market Shares” to Determine Amount of Retained Expenditure** - the results of the household survey are used to determine the amount of spend currently retained in the region (and each County), whilst taking into account in-flow expenditure from tourists.
- Step 3: Determine Whether the Existing Retail Economy is Trading at Equilibrium** - for the region as a whole (and constituent Council areas/centres) the scale of any under or over-trading at the base year (2009) is estimated by comparing actual turnover (derived from the survey) against benchmark turnover; any expenditure surplus or shortfall is taken into account in estimating future available headroom expenditure at the forecast years of 2016 and 2022. This is considered to be a realistic and robust approach, since it reflects the current variability of retail performance of centres across the Mid West.
- Step 4: Calculate Growth in Retained Expenditure through to the Forecast Years** - having determined the base year (2009) “market shares” and levels of retained retail expenditure within the Mid West as a whole and its constituent Council areas, the principle of market shares is used to calculate how much more expenditure or trade the region could expect to attract in the future as a result of the forecast growth in expenditure.

Step 5: Determine Level of Potential Headroom Expenditure at the Forecast Years - not all of the increase in retained expenditure within the Mid West (and constituent Council areas) is available by the forecast years to support additional retail floorspace, because an allocation of spend must be made to existing retailers as they grow their sales productivities in real terms over time.

Step 6: Determine Level of Residual Headroom Expenditure at the Forecast Years - this involves adjusting the potential headroom expenditures in two ways: first, by taking into account any over or under-trading that is occurring at the base year and second, by taking into account the forecast turnovers of any retail floorspace commitments.

Step 7: Estimate Need for Additional Retail Floorspace at the Forecast Years – the residual expenditure totals are converted into retail floorspace requirements for the Mid West Region and its constituent Council areas.

Principal Data Sources

5.8 The quantitative retail floorspace need assessment utilises four major sources of data and all are **new** to this Review. These are as follows:-

- **Shopping Patterns** - a new household telephone survey provides data on shopping trip patterns and consumer retail expenditure flows (full details at **Appendix 3**);
- **Population** - population estimates for the base year (2009) and the forecast years of 2016 and 2022 have been provided by the Councils (full details at **Appendix 4A**);
- **Retail Expenditure** - bespoke estimates of consumer retail spend per head in 2007 for the Mid West Region and forecasts of the growth in expenditure per head have been produced

by *Oxford Economics* specially for this Review (full details at **Appendix 4B**);

- **Retail Floorspace** - existing (March 2009) retail floorspace stock data and details of retail commitments have been provided by the Councils (full details in **Appendix 5**).

5.9 The use of this new data enables the Review to fully reflect the impact of the downturn in the economy on both consumer spending (demand) and retail development activity (supply), which will ensure that the forecasts of additional retail floorspace need are realistic and broadly consistent with market trends.

Key Assumptions

5.10 In addition to the major sources of data, there are a number of key assumptions which have an important bearing on the results of the retail need assessment. They may be grouped under the following headings:-

- *Retail Expenditure*
- *Store Productivities*
- *Sales Densities*

Retail Expenditure

5.11 Future spending levels have an important bearing on the need for additional retail floorspace. The expenditure growth assumptions used are therefore critical to the validity of the overall quantitative need assessment and it is vital that realistic and robust figures are used.

5.12 This assessment uses 2007 based expenditure forecasts produced by *Oxford Economics* specifically for this Review.¹ The full *Oxford Economics* report, which explains the forecasting

¹ *Oxford Economics* forecasts for this report were prepared in March, 2009. Since then the Irish economy has weakened further and more recent forecasts by ESRI and others are for an even bigger fall in Irish GDP this year. However, over the full term of the new Retail Strategy there are unlikely to be material differences between the OE and later forecasts, particularly in relation to consumer retail expenditure growth.

methodology, provides a comparison with the UK and presents full details of the expenditure forecasts, is reproduced in **Appendix 4B**. *Oxford Economics* has generated annual forecasts for changes in consumer retail expenditure per head from 2007 through to 2020. Separate forecasts have been produced for the Mid West Region for:-

- Convenience goods
- Non-bulky comparison goods
- Bulky comparison goods

5.13 *Oxford Economics* expenditure **forecasts** are estimates of **future** spending based on an economic model of disaggregated consumer spending. They differ from expenditure **projections** that are estimates of future spending based on extrapolation of **past** trends. *Oxford Economics* advises that when carrying out medium to longer term retail need assessments, the use of forecasts is preferred to projections, since they incorporate the strong likelihood of changing spending patterns amongst consumers over the coming years in a way projections cannot. The *Oxford Economics* consumer spend forecasts are summarised in **Table 5.1**.

Table 5.1 Expenditure Per Head Growth Forecasts, 2007-2020

Average Annual Growth in Spending Per Head (% Constant Prices)			
Goods Category	Mid West Region	Ireland	UK
Convenience Goods	0.4	0.4	0.3
Comparison Goods	3.9	3.8	2.9
Non-Bulky	3.8	3.6	n/a
Bulky	4.2	4.1	n/a
All Retail Goods	2.4	2.4	2.0

Source: *Oxford Economics* (Full details are set out in **Appendix 4B**)

In-flow Expenditure

- 5.14 In-flow expenditure into the Mid West Region originates from domestic and overseas tourists (from outside the Mid West) staying in the region.
- 5.15 By extending the household survey area to beyond the Mid West Region (see **Figure 4.1**), the objective is to capture virtually all day trips made into the region for shopping purposes by Irish residents. However, this survey does not provide any information on spend generated by tourists, which in the case of the Mid West is likely to make a material contribution to the region's retail economy. Accordingly, the amount of tourist spend in the Mid West (and its constituent Counties/centres) on retailing has been estimated for the base year of 2009 and projections made as to its likely growth in real terms through to 2022. This assessment (and assumptions adopted) is set out in full at **Appendix 4C**. The quantum of retail spend generated each year by tourists is net additional to that produced by residents within the household survey area. Therefore, estimates of the annual retail turnover of the Mid West (and its constituent Counties/centres) are derived by adding together the shopping expenditures of residents and tourists.

Special Forms of Trading

- 5.16 It is normal in the preparation of quantitative retail need assessments to make deductions from the consumer retail expenditure per person figures adopted to allow for expenditure by 'special forms of trading' (SFT). This is retail expenditure that does not take place in shops, such as that via mail order houses, door to door salesmen and stalls and markets. It also includes spending using digital TV and over the internet.
- 5.17 Recent evidence within the UK suggests that e-tailing sales are increasing as a proportion of total retail expenditure, although perhaps not at the rate many commentators forecast at the height of the dot.com boom some years ago. Much of the initial growth in e-tailing was achieved through the cannibalisation of existing consumer retail expenditure on traditional catalogue-based mail order. However, this could not continue so recent, current and future gains in e-tailing will now directly feed through into an increase in retail sales by SFT. Accordingly, it is felt prudent to take this into account in the quantitative retail need assessment.

- 5.18 In preparing this Review, a range of published material on the subject of the e-tailing has been examined. However, there do not appear to be any robust estimates of the relative share of store and non-store sales for Ireland. Therefore, recent forecasts prepared by Experian for the UK retail market are used as a basis for producing assumptions for the Mid West Region.
- 5.19 It is assumed that consumer expenditure by special forms of trading is currently lower in the Mid West Region than in the UK, due to the likelihood of lower broadband/internet access amongst residents, combined with a less mature market for e-tailing activity in general. For these reasons, penetration by SFT is assumed to be 20% lower in the Mid West than in the UK at the present time. However, it is expected that the SFT penetration rates will converge over time. Therefore, the downwards adjustments for the Mid West reduce to 10% at the forecast year of 2016 and to zero by 2022. The SFT percentages are summarised in **Table 5.2**.

Table 5.2 Special Forms of Trading: Share of Total Consumer Retail Expenditure (%)

Year	UK ⁽¹⁾		Mid West ⁽²⁾	
	Convenience Goods	Comparison Goods	Convenience Goods	Comparison Goods
2009	6.5	12.2	5.2	9.8
2016	8.1	13.9	7.3	12.5
2022	8.1	13.9	8.1	13.9

⁽¹⁾ Source: Experian, Retail Planner Briefing Note 6.1, October 2008 (Revised January, 2009).

⁽²⁾ Colliers CRE estimates for Mid West; 20% discount to UK assumed for 2009, reducing to 10% discount at 2016 and 0% at 2022.

Store Productivities

- 5.20 It would be wrong to assume that all of the increase in consumer retail expenditure within the Mid West Region is available to support additional retail floorspace. This is because it is appropriate that some of the forecast growth in expenditure should be allocated to existing retailers because the evidence confirms that existing retail shops, in fact, achieve real, and necessary, gains in sales productivities year on year. Rising sales densities are driven by a number of factors including growth in floorspace efficiency and changes in trading hours, net to

gross ratios and the mix of goods. Rapidly rising costs also mean existing retailers must grow their sales densities in real terms to remain viable. With the economic recession leading to significant reductions in the store sales densities of many retailers across the Mid West over the past 12 months, the issue of continuing viability becomes particularly important. It seems only right that going forwards existing retailers (from a 2009 base) are permitted small annual real increases in their store productivities to enable them to recover recent lost sales and invest in their shops, staff and stock in the future.

- 5.21 Consequently, to avoid making an expenditure allowance for existing retailers would lead to a “double-counting” of future available retail expenditure and thus an over estimation of the need for additional retail floorspace (i.e. the consumer spend that will be soaked-up by existing retail floorspace would be used to justify the need for new retail floorspace).
- 5.22 In Ireland no data is available on changing store productivities over time. Therefore, it is deemed appropriate to consider the UK retail market which has benefited from recent research on trends and projections in retail sales densities. Experian, following a major research study it carried out on the quantitative need for additional retail floorspace for the British Council of Shopping Centres (BCSC), has published new research on the subject and its relevance to retail floorspace need assessments.¹ Experian conclude that retailers, on average, have in recent years (pre-economic downturn) achieved higher gains in turnover efficiency than previously thought. The company conclude that projected sales densities (for the UK) in their central case assumption are 2.2% and 0.6% a year for comparison goods and convenience goods floorspace respectively, with a high case projection of 2.8% and 0.8% and low case of 1.5% and 0.25% (for comparison and convenience floorspace respectively).
- 5.23 In carrying out surveys, site visits and other work which underpins the Revised Retail Strategy, it has become clear that, in overall terms, there is scope to further improve the quality of the retail offer across the Mid West Region as a whole. These qualitative improvements have been referred to in Section 3, and the revised Retail Strategy seeks to encourage and facilitate an improvement in the quality of retail provision. To reflect these policy aims, it is considered that adopting figures within the lower range of store productivity growth estimated by Experian for the UK retail market is more appropriate for the Mid West for the time period through to

¹ Experian Retail Planner Briefing Note 6.1, October 2008 (Revised January 2009).

2016 (and 2022), even though this may mean the loss of some existing out-dated retail floorspace as new shopping development proceeds. The study therefore adopts the following annual growth rates:-

- *Convenience goods* - 0.50% pa
- *Comparison goods* - 1.75% pa (non-bulky and bulky goods)

Sales Densities

5.24 In order to assess the scale of any over or under trading of the existing retail floorspace stock at the base year (2009), estimated actual retail turnovers, which are derived from the results of the household telephone survey, are compared against estimated benchmark turnovers. **Benchmark turnovers** have been estimated for each broad category of goods and for each major centre and group of smaller centres. The turnover estimates are built-up using published statistics on company average sales densities combined with data on city and town centres, such as size (retail floorspace), retailer representation, quality and configuration of retail accommodation, rental levels and position in the shopping hierarchy. Regard has also been given to the benchmark turnover levels adopted for centres in other recently completed Retail Strategies, such as for the GDA,¹ to the demographic and general economic prosperity of the Mid West (eg. relative to the GDA), and to the impact of the economic recession on average retailer trading levels across the country as a whole.

5.25 **Sales density** measures the relative efficiency with which floorspace is used by retailers to convert sales floorspace into retail turnover. Retailers selling high value goods from relatively small units generally achieve much higher sales densities than retailers such as DIY or bulky furniture operators selling lower value products from large stores.

5.26 Forecast sales densities are used at two stages in the quantitative retail floorspace need assessment:-

- to estimate the turnover of retail commitments;

¹ Retail Strategy for the Greater Dublin Area, 2008-2016, July 2008.

- to convert the available residual headroom expenditure at each of the forecast years into a need (or requirement) for additional retail floorspace.

5.27 In considering what are the most appropriate sales densities to use it is necessary to bear in mind the following:-

- that sales densities relating to **new** retail stores or schemes (which will open in the future) are generally likely to be higher than those which apply to **all** of the existing retail floorspace stock in a centre at the base year (2009);
- that sales densities vary widely between different goods categories being generally higher for convenience goods floorspace;
- that sales densities for both convenience goods and comparison goods will increase over time due to the real increases in store productivity which apply to all retail floorspace (see paragraph 5.23).

5.28 It is therefore necessary to adopt a range of sales densities in order to account for the variability in retail productivity across the principal goods categories and over time. In selecting what are considered to be realistic sales densities, regard has been had to the general characteristics and performance of Mid West retail economy and the existing actual and benchmark sales densities of the different centres across the region. The assumed sales densities for retail commitments and for converting available headroom expenditure into new (additional) retail floorspace are set out in **Table 5.3** overleaf.

Table 5.3 Assumed Forecast Sales Densities (€psm net at 2007 prices)

Goods Category	Forecast Years	
	2016	2022 ⁽¹⁾
Non-Bulky Comparison Goods	€7,000	€7,768
Bulky Comparison Goods	€4,000	€4,439
Convenience Goods	€10,000	€10,304

⁽¹⁾ The sales densities are higher at 2022 because they include appropriate annual real increases in store productivities from 2016.

The Need for Additional Retail Floorspace

5.29 The key driver of the need for additional retail floorspace in any area is the growth in consumer retail expenditure (population times spend per head). However, the approach used to estimate need (if any) in the new Retail Strategy also takes into account a number of other factors which makes the assessment more realistic. For the Mid West these are as follows:-

- estimated under-trading at 2009 (the base year);
- an allowance for rising store productivities over time for existing retailers; and
- retail floorspace commitments.

5.30 These factors individually and collectively soak up future consumer retail expenditure growth resulting in **less** spend being available to support **new** retail floorspace. This is the case in the Mid West.

5.31 However, in interpreting the data the Councils may wish to ascertain the levels of future floorspace need resulting from the exclusion of one or more of these factors. Accordingly, the need estimates for the Mid West Region as a whole are set out (below) against a range of assumptions – the detailed figures in **Appendix 6** will enable the Councils to calculate the headroom expenditure for any given assumption and sub-area. The **recommended approach** is to take into account both (any) under/over-trading at the base year and changing

store productivities. Due to the economic climate, it is possible, indeed probable, that at least some of the retail commitments may not be built (at least by 2016). For this reason we produce need estimates with and without commitments.

- 5.32 A separate retail floorspace needs assessment is undertaken for each of the three main categories of goods.

The Need for Additional Convenience Goods and Bulky Comparison Goods Floorspace

- 5.33 Adopting the 'constant market shares' approach, as described in paragraph 5.3, the retail floorspace need results for the Mid West as a whole in relation to convenience goods and bulky comparison goods are set out in **Tables 5.4** and **5.5** respectively.

Table 5.4 Convenience Goods Floorspace Need, Mid West Region

Assumption	2016		2022	
	Available Expenditure (€M)	Floorspace Need (Sq M Net)	Available Expenditure (€M)	Floorspace Need (Sq M Net)
(a) <i>Growth in consumer retail expenditure</i>	175.3	17,530	329.0	31,929
(b) <i>Allowance for rising store productivities (only)</i>	137.6	13,760	257.9	25,029
(c) <i>Allowance for under-trading at the base year (only)</i>	24.6	2,460	178.3	17,304
(d) <i>Allowance for (b) and (c)</i>	(13.2)	(1,320)	107.2	10,404
(e) <i>Allowance for (b) and (c), plus retail commitments</i>	(297.9)	(29,788)	(186.0)	(18,051)

Note: Figures in brackets are negative.

Table 5.5 Bulky Comparison Goods Floorspace Need, Mid West Region

Assumption	2016		2022	
	Available Expenditure (€M)	Floorspace Need (Sq M Net)	Available Expenditure (€M)	Floorspace Need (Sq M Net)
(a) <i>Growth in consumer retail expenditure</i>	143.4	35,850	344.0	77,495
(b) <i>Allowance for rising store productivities (only)</i>	99.4	24,850	257.8	58,076
(c) <i>Allowance for under-trading at the base year (only)</i>	74.3	18,575	274.9	61,928
(d) <i>Allowance for (b) and (c)</i>	30.4	7,600	188.8	42,532
(e) <i>Allowance for (b) and (c), plus retail commitments</i>	(85.0)	(21,255)	60.6	13,651

Note: Figures in brackets are negative.

- 5.34 Making an allowance for under-trading at the base year and rising store productivities for existing retail floorspace form an important part of the methodology, although as demonstrated by **Tables 5.4 to 5.5** these factors do eat into the headroom expenditure. However, it is the impact of retail commitments which has the greatest impact – note the differences in the figures between rows (d) and (e) in the tables – reflecting the considerable scale of the retail development pipeline throughout the Mid West.
- 5.35 Accordingly, in **Tables 5.6 to 5.7** overleaf, which provide a breakdown of retail floorspace need by Council area, the results are presented with and without commitments (but assuming allowances have already been made for under-trading and rising store productivities), since under current economic circumstances it is far from certain all will proceed to be built. The retail floorspace need results for individual cities, towns and sub-areas are set out in the detailed spreadsheets at **Appendix 6**.

Table 5.6 Convenience Goods Floorspace Need by Council Area

COUNTY	2016				2022			
	Without Commitments		With Commitments		Without Commitments		With Commitments	
	(€M)	(Sq M Net)	(€M)	(Sq M Net)	(€M)	(Sq M Net)	(€M)	(Sq M Net)
Limerick City	14.6	1,460	(25.0)	(2,499)	58.6	5,687	17.8	1,727
Limerick County	(60.3)	(6,030)	(177.9)	(17,793)	(34.3)	(3,329)	(155.5)	(15,091)
Clare County	51.4	5,140	(18.2)	(1,824)	84.6	8,210	13.0	1,262
North Tipperary	(18.8)	(1,880)	(76.7)	(7,672)	(1.6)	(155)	(61.2)	(5,939)
Mid West	(13.2)	(1,320)	(297.9)	(29,788)	(107.2)	10,404	(186.0)	(18,051)

Note: Figures in brackets are negative.

Table 5.7 Bulky Comparison Goods Floorspace Need by Council Area

COUNTY	2016				2022			
	Without Commitments		With Commitments		Without Commitments		With Commitments	
	(€M)	(Sq M Net)	(€M)	(Sq M Net)	(€M)	(Sq M Net)	(€M)	(Sq M Net)
Limerick City	58.4	14,600	49.2	12,300	132.9	29,939	122.7	27,641
Limerick County	(19.8)	(4,950)	(65.6)	(16,400)	9.1	2,050	(41.7)	(9,394)
Clare County	(3.6)	(900)	(29.0)	(7,250)	27.9	6,285	(0.5)	113
North Tipperary	(4.6)	(1,150)	(39.5)	(9,875)	18.8	4,235	(20.0)	(4,506)
Mid West	30.4	7,600	(85.0)	(21,255)	188.8	42,532	60.6	13,651

Note: Figures in brackets are negative.

- 5.36 In relation to convenience goods, by 2016 (the end date of the new Retail Strategy) a large over-supply of convenience goods floorspace is estimated for the Mid West as a whole when commitments are taken into account. Even when commitments are excluded a small over supply of sales space is forecast within the region. By 2022, including commitments, floorspace over-supply still exists in the region as a whole, but without commitments the volume of estimated need is 10,400 sq m net.
- 5.37 For bulky comparison goods, a substantial over-supply of floorspace is forecast at 2016 for the Mid West as a whole with commitments, but excluding commitments a modest need for 7,600 sq m net is estimated. By 2022 a need for an additional 42,500 sq m net of floorspace is estimated without commitments, although this reduces to 13,650 sq m when existing commitments are taken into account.
- 5.38 The regional floorspace need totals for both convenience and bulky comparison goods mask big differences at the County level, whilst the detailed tables in **Appendices 4C** and **4D** show variations also exist at an even more disaggregated level.

The Need for Additional Non-Bulky Comparison Goods

- 5.39 As explained at paragraph 5.4, there are sound planning, economic and social reasons for strengthening the retail economy of Limerick City Centre. The most effective means of materially improving Limerick City Centre's attractiveness to shoppers is to significantly improve its offer in **non-bulky comparison goods**, which typically forms the 'anchor' use of larger city and town centres. The existing market shares of the city centre (as generated by the household survey) are therefore adjusted upwards. The adjustments are set out in **Appendix 6B, Table 7**, whilst the impact of these adjustments are reflected in **Tables 8 to 13** inclusive.
- 5.40 Based on the results of the household survey, it is estimated that Limerick City Centre currently captures a market share of 35% of available non-bulky comparison goods expenditure in the survey area (see **Appendix 6B, Table 6**). It is considered that there is scope to increase the city centre's market share from 35% to perhaps as much as 44% by 2016 (and retained at this higher level until 2022) (**Table 8**). This is deemed to be a realistic 'target' market share for the city centre given its designated role and function in the Mid West

shopping hierarchy. The change requires adjusting upwards the city centre's market shares for non-bulky comparison goods in each of the 11 zones that make up the survey area. The effect of increasing Limerick's market shares is to decrease the market shares of the other centres within each of the 11 zones in order that the shares continue to sum to 100% in each zone. The full range of adjustments are set out in **Appendix 6B, Table 7**. An important positive impact of raising Limerick City Centre's market share is that the estimated leakage of non-bulky comparison goods expenditure from the Mid West Region will fall from an estimated 7.3% today (2009) to 5% in 2016.

- 5.41 Following the adjustments to Limerick City Centre's market shares, the retail floorspace need results for the Mid West Region as a whole in respect of non-bulky comparison goods are set out in **Table 5.8**.

Table 5.8 Non-Bulky Comparison Goods Floorspace Need, Mid West Region

Assumption	2016		2022	
	Available Expenditure (€M)	Floorspace Need (Sq M Net)	Available Expenditure (€M)	Floorspace Need (Sq M Net)
(a) <i>Growth in consumer retail expenditure</i>	369.7	52,814	843.0	108,522
(b) <i>Allowance for rising store productivities (only)</i>	262.9	37,557	633.8	81,591
(c) <i>Allowance for under-trading at the base year (only)</i>	301.8	43,114	775.1	99,781
(d) <i>Allowance for (b) and (c)</i>	195.1	27,871	565.9	72,850
(e) <i>Allowance for (b) and (c), plus retail commitments</i>	(242.9)	(34,702)	486.2	10,264

Note: Figures in brackets are negative.

- 5.42 Adopting the same structure as **Tables 5.6** and **5.7**, **Table 5.9** provides a breakdown of the need for additional non-bulky comparison goods floorspace by Council area. The results are presented with and without commitments, but assume allowances have been made for under-trading and rising store productivities.

**Table 5.9 Non-Bulky Comparison Goods Floorspace Need by Council Area
(includes Limerick City Centre)**

COUNTY	2016				2022			
	Without Commitments		With Commitments		Without Commitments		With Commitments	
	(€M)	(Sq M Net)	(€M)	(Sq M Net)	(€M)	(Sq M Net)	(€M)	(Sq M Net)
Limerick City*	126.5	18,071	(2.1)	(300)	335.5	43,190	192.8	24,817
Limerick County	(36.0)	(5,143)	(160.0)	(22,857)	15.6	2,008	(122.1)	(15,720)
Clare County	83.8	11,971	15.3	2,186	149.9	19,297	73.9	9,515
North Tipperary	20.7	2,957	(96.2)	(13,743)	65.0	8,368	(64.8)	(8,348)
Mid West	195.1	27,871	(242.9)	(34,700)	565.9	72,850	79.7	10,264
Limerick City Centre Only*	194.0	27,714	110.8	15,829	393.4	50,644	301.1	38,766

Note: Figures in brackets are negative.

- 5.43 At 2016, a need in Limerick City Centre for up to c.28,000 sq m net (without commitments) of non-bulky comparison goods is estimated, rising to 51,000 sq m net by 2022. After taking commitments into account, the need estimates reduce to c.16,000 sq m net at 2016 and c.39,000 sq m by 2022. Outside of Limerick City Centre, much more modest levels of need are also forecast for Clare County in 2016 and 2022, even after including existing commitments.

- 5.44 The retail floorspace need estimates set out in **Tables 5.4 to 5.9** inclusive do not take into account the existing total of **vacant** retail floorspace throughout the Mid West. As noted in Section 3, the quantum of unoccupied floorspace is estimated at c.86,000 sq m net. The available data does not allow this void total to be disaggregated by category of goods (in any event retail uses can change category in many cases without requiring planning consent)¹.
- 5.45 However, if we consider **all retail goods** for the Mid West as a whole, and assume that all the vacant floorspace is available for occupation by retailers then the over-supply at 2016 (including commitments) doubles from c.86,000 sq m net to 172,000 sq m net. At 2022, the inclusion of vacant floorspace would convert a modest need of c.6,000 sq m net to an over-supply of 80,000 sq m net. In reality of course a proportion of the currently available vacant floorspace is likely to be of secondary quality and/or located in secondary locations, and therefore unlikely to be attractive to modern retailers. For this reason, simply adding the vacant stock to the floorspace over-supply estimated at both 2016 and 2022 represents a worse case scenario. Nevertheless, some of the vacant floorspace is in modern, good quality units, particularly those on recently built retail parks, and this stock is eminently suitable for retailers and should be fully utilised prior to granting consent to new schemes.
- 5.46 In interpreting the floorspace need estimates, it should be noted that the totals are in sq m net and represent the **net additional** retail floorspace that could be accommodated. To convert to gross floorspace, the net to gross ratios set out in **Appendix 5A** should be adopted. Moreover, the need totals relate to retail floorspace only. In practice, many new retail developments contain other uses, especially catering and other service activities. To reflect the mix of uses in new retail schemes, particularly those located within city or town centres, it is considered that, on average, c.20% of new floorspace should be set aside for non-retail activities. Clearly in applying this assumption, in practice, the Councils should have full regard to the location and type of development being proposed; clearly a large city or town centre scheme is likely to include more service floorspace than an application for an out of centre stand alone superstore, which may not have any.

¹ Except for certain retail parks schemes, which have restricted planning consents attached to them.

Summary

- 5.47 Estimating future retail floorspace need is quite complex and involves making many assumptions about the existing retail economy of the Mid West and forecasts of population and expenditure growth. The assessment indicates that the region as a whole is already over-shopped, fuelled by a doubling of retail floorspace supply over the past seven years and exacerbated by the severe economic downturn of the past 12 months, which has badly hit retailer demand. All three broad categories of goods are estimated to be currently under-trading across the region as a whole, and this is after assuming relatively low benchmark turnover levels.
- 5.48 The current retail development pipeline is substantial, and combined with the existing retail offer it is not altogether surprising that there is no need for any further retail floorspace in the Mid West as a whole through to 2016 (the end date of the Retail Strategy). By 2022, a modest level of need for further non-bulky and bulky comparison goods floorspace is estimated, after commitments. However, taking into account commitments, there will remain a large surplus stock of convenience goods floorspace at 2022.
- 5.49 Clearly the economic difficulties currently being experienced may impact on the existing retail development pipeline and some, or many, schemes may slip or not proceed at all. If this were to occur, then the scale of need for new retail floorspace will increase (or, more realistically, the amount of surplus stock will reduce) but, in practice, it is unlikely that new schemes will come forward seeking planning consent when existing schemes (with full planning permission) have stalled.
- 5.50 There is a strong case for strengthening the position of Limerick City Centre in the regional shopping hierarchy. This is best achieved through actively planning for additional non-bulky comparison goods floorspace. The assessment indicates there is potential for a significant addition to shopping provision in the city centre by 2016, even though there will be an over-supply of floorspace across the region as a whole. This can be explained by the fact that an enhanced Limerick City Centre will mean small reductions in the potential for additional non-bulky comparison goods floorspace in a number of other centres across the Mid West which, in practice, will in many cases lead to a larger over-supply of retail floorspace stock. It should be noted that the trading effects of an enhanced Limerick City Centre will be mitigated to an

extent by a small forecast percentage reduction in expenditure leakage from the Mid West Region as a whole.

6.0 THE RETAIL PLANNING STRATEGY

Introduction

6.1 The Retail Planning Strategy's primary purpose is to support the statutory plan making process to ensure that adequate provision is made for new retail development in the most appropriate locations. The strategy provides guidance on the need for new retail floor space and where, in accordance with the principles of sustainable planning, it should be allocated. This section sets out the key policy areas of the new Retail Strategy for the Mid-West Region (Limerick City, Limerick County and Clare County only). Unlike the 2003 Strategy, this update looks individually at Limerick City Centre, the other centres in the Metropolitan Area and each of the other main towns across the rest of the region. The implications of the retail market review coupled with the quantitative retail floorspace need assessment for the region provide an important basis for the policy direction of the new Retail Strategy, as well as for the determination of planning applications. This section is divided into five sub-sections:-

- The retail strategy vision.
- The retail hierarchy.
- Policy guidance for each centre.
- Proposals for continued monitoring.
- The development management process.

6.2 Maps showing the proposed changes to city and town centre boundaries are set out at the end of this section.

The Retail Strategy Vision

6.3 The planning system has a key role in facilitating and promoting sustainable patterns of development, including the creation of vital and viable city and town centres, which serve the surrounding developed areas and rural communities in the hinterland in a meaningful and practical way.

- 6.4 The central key objective arising from the Retail Strategy Vision is to support the “town centre” first approach in the context of the retail hierarchy, and to promote the vitality and viability of existing centres by focusing development in them and encouraging a wide range of services in a good environment which is accessible to all.
- 6.5 The quantitative assessment of retail floorspace need underpinning the 2003 Retail Strategy identified significant potential for the development of additional retail floorspace. In terms of Limerick City it did not consider this need could be met in the City Centre in the short term and so proposed it should be met within the Metropolitan Area.
- 6.6 The Review of retail need has demonstrated that this potential was over estimated for a number of reasons. Since 2003, there has been a very significant growth in retail floor space, a level of growth which has even outstripped the level of need identified in the 2003 Retail Strategy. Whilst there has been growth across the region, the bulk of new floorspace has been provided in the Limerick Metropolitan Area. However, there has been relatively little growth in the City Centre itself. As a consequence the relative importance of the City Centre has declined.
- 6.7 The Mid West region is now at a crossroads where, if further large scale suburban retail development is allowed, there will be possibly irreversible, detrimental impacts. Limerick City Centre, whilst at the top of the retail hierarchy, has suffered most from competition from other suburban and out of centre comparison shopping destinations. What the developments over the last few years have shown is that new retail development in one location unsupported by a corresponding growth in expenditure will divert trade from an existing location elsewhere, with a consequent disinvestment and loss of jobs there.
- 6.8 As a consequence, it essential for a new approach to be adopted; an approach which seeks to coordinate the provision of new retail development across the region to create a balanced pattern of shopping in accordance with the broad objectives of the National Spatial Strategy, in particular sustainable national economic and employment growth and the promotion of social inclusion.
- 6.9 The new Retail Strategy therefore emphasises the importance of Limerick City Centre both at the top of the retail hierarchy and as an important ‘Gateway’ into western Ireland. The

City Centre has the historic interest, service infrastructure and transport accessibility to offer a cohesive attraction to both local people and to visitors, and it is important that its attraction is not undermined by a run down city centre which fails to provide a choice of high quality retail facilities suitable for a city of its size and fulfilling its national role.

- 6.10 It is important for Limerick City Centre to maintain its dominant retail function at the top of the Mid West hierarchy, and to recapture some of the market share it has lost to other centres, especially the Crescent Shopping Centre, and to other out of centre retail destinations such as the Childers Road Retail Park. The consequence of not planning for the development of new retail floorspace would be to preserve the current imbalance, most probably leading to a further decline in the range and quality of retailing in Limerick City Centre.
- 6.11 Those centres in the Metropolitan Area meeting the day to day needs of a local catchment population through the provision of main food shopping outlets should be supported and reinvigorated where necessary. However, their role should not be allowed to expand to encompass a materially broader range of comparison goods as this could lead to further competition with the City Centre. There should be no new permissions granted for additional out of centre retailing, including the extension of any existing store or retail park, and the broadening of the range of goods sold to encompass any categories other than bulky goods. Similarly these centres and retail parks should not be expanded beyond a scale appropriate for a suburban shopping location in Limerick. Consequently, there should not be any expansion of these shopping facilities in order to allow the City Centre to foster investment and improve its trading position.
- 6.12 It is also important for existing centres outside the Metropolitan Area, especially those serving large rural hinterlands, to be able to regenerate and improve their retail centres to ensure they continue to provide attractive, modern facilities capable of providing a good range and quality of retail services to local people. Such development not only enhances the vitality and viability of the town centres, but contributes to the principles of sustainable development, improves social inclusion and secures the benefits achieved through competition.

6.13 Therefore, notwithstanding the general lack of retail need identified up to 2016 and beyond, the proposed Retail Strategy does not seek to prohibit new development. Instead it promotes development in Limerick City Centre in order to secure its future vitality and viability by recapturing trade from suburban and out of centre retail destinations. Elsewhere the Retail Strategy seeks to match the scale and function of retail development with the scale and function of the centre, combined with a restriction on new development in out of centre locations. In the smaller rural centres of County Clare a positive approach to promoting new small scale development should be pursued to ensure local people have access to shopping facilities which will meet their day to day needs.

The Retail Hierarchy for the Mid West Region

6.14 The 2003 Retail Strategy devised the first hierarchy of centres for the Mid-West Region,¹ looking across the region as a whole. Whilst the hierarchy is based upon the national retail hierarchy² set down in the Retail Planning Guidelines, the hierarchy for the Mid-West Region distinguishes between the Limerick Metropolitan Area and a more rural hinterland around it, recognising the different functions which similar centres can perform in the two geographical areas. The hierarchy was developed following a detailed review of existing settlements and with reference to the national and local policy inputs applicable at the time. The hierarchy is intended to provide the means to:-

- recognise the role and importance of Limerick City Centre;
- to define the role of shopping centres in the wider Limerick Metropolitan Area;
- enhance the region's competitiveness by clearly identifying the key centres in the hierarchy where major new retail floor space should go;
- strengthen the role and function of key centres around the Mid-West;
- ensure that there is a good geographical distribution of key centres in the hierarchy; and

¹ See Table 2.7 in Section 2.

² See Table 2.6 in Section 2.

- differentiate between centres within the different levels of the hierarchy to overcome the issue of classification being indicative (see paragraph 5.14 of the 2003 Retail Strategy).

- 6.15 The findings of the re-inspection of the relevant centres within Limerick City and County, and Clare County Council areas are set out at **Appendix 2**. It was not part of the brief to re-inspect the centres in County Tipperary.
- 6.16 It is necessary to redefine the hierarchy in order to promote the step change in the Retail Strategy. The **new** retail hierarchy for the Mid West is set out in **Table 6.1**. Those retail facilities in Metropolitan Limerick, apart from the City Centre, have consequently been removed from the hierarchy for the region. This approach emphasises the primacy of the City Centre in terms of regional shopping provision.

Table 6.1 The Retail Hierarchy for the Mid West Region

Mid West Retail Hierarchy		
Tier 1 - City Centre		Limerick City Centre
Tier 2 - Major Town Centres	Level 1	Ennis
	Level 2	Shannon Newcastle West
Tier 3 – Town Centres	Level 1	Kilrush Abbeyfeale
	Level 2	Ennistymon Killaloe Scarriff Adare Killmallock Rathkeale
Tier 4 – Neighbourhood and Village Centres	Level 1	Sixmilebridge Newmarket-on-Fergus Miltown Malbay Kilkee Tulla
	Level 2	Corofin Lahinch Lisdoonvarna Kildysart Ballyvaughan
Tier 5 – Local/Corner Shops		Smaller villages/crossroads – rural shops (post offices, creameries, public houses, petrol filling stations etc)

- 6.17 For dealing with proposals within the Limerick Metropolitan Area, a sub-hierarchy which covers the administrative areas of both Limerick City and Limerick County has been created. This is set out in **Table 6.2**. Again the City Centre sits at the top with the other existing centres in a second tier. For the purposes of clarity, the Tier 2 centres in this hierarchy are not comparable with any centres in the main hierarchy. Whilst it is not intended there should be a significant extension in the scale or change in the function of any of these second tier centres, they are in turn sub-divided into two levels to reflect the different levels of provision in each. To reinforce the approach of the Strategy, no centre should be allowed to change its position (either tier or level) in the sub-hierarchy.

Table 6.2 The Retail Hierarchy for the Limerick Metropolitan Area

Limerick Metropolitan Area		
Tier 1		Limerick City Centre
Tier 2	Level 1	Dooradoyle (Crescent Shopping Centre)
	Level 2	Caherdavin Castletroy Parkway Roxboro Moyross

- 6.18 It has been considered whether the emerging centres at Coonagh Cross and Parkway Valley should be included within the retail hierarchy for the Limerick Metropolitan Area. Coonagh Cross has been largely developed but only the Tesco food store is trading; the adjoining retail mall is un-let and boarded up. The associated retail warehousing is also largely complete but remains un-let. Whilst this scheme shares some characteristics with Tier 2, Level 2 centres in Metropolitan Limerick, as it does not provide a range of other facilities and is not currently trading, it is not considered appropriate for it to be included within the retail hierarchy at the present time.

- 6.19 Similarly, whilst Parkway Valley could potentially provide a range of shopping facilities comparable to the Crescent shopping Centre, it is not yet fully built. Furthermore, it is not well enough related to either the adjacent Parkway Retail Park or Parkway Shopping Centre to act as a single unified shopping destination. The scale of the scheme also means it will fulfil a different function to the Parkway Shopping Centre which would not accord with the latter's position in the retail hierarchy. Again, therefore, it is considered inappropriate to include this facility within the retail hierarchy at this stage. Consequently both of these facilities should be treated as being out of centre in the consideration of any planning applications.

Policy Guidance and Recommendations

- 6.20 The delivery of the Retail Strategy Vision for the Mid West Region is critical to achieving viable, sustainable and functional retail facilities for Limerick City Centre, the wider Metropolitan Area, and ensuring that the needs of the centres in each tier of the hierarchy elsewhere are met in a balanced manner. This delivery is dependent upon establishing a coherent policy approach for each Council area, which is commercially realistic.
- 6.21 The translation of the vision into policy objectives for each Council requires key directions to be laid down and a framework established for co-operation across Council boundaries.
- 6.22 It is recommended that the City and County Councils adopt a positive and proactive approach towards planning for retail development within their respective areas, within the context of the Mid West Region Retail Strategy. Their Development Plans should set out individual retail strategies for the network and hierarchy of centres at all levels. This proactive approach should, where necessary, extend to using Compulsory Purchase Powers to bring forward important sites.
- 6.23 In planning for retail development in their administrative areas, local authorities should:-
- Take into account the implications of the national and local retail market: - the state of the national retail market will impact upon the need for new retail floorspace within the local area. Similarly the amount and quality of existing retail floorspace and whether it meets the requirements of retail operators is important;

- Be aware of new trends, technologies, efficiencies and innovations: - retailing is a dynamic industry and new trends impact on both the type, and through increasing internet trading, the amount, of retail floor space required;
- Take account of the broad forecast for additional retail floorspace need and how the retail sector will want to respond to that demand over the Plan period:- these assessments form the cornerstone for the development of retail policies allocating sites for development;
- Encourage retail development in “town centre” locations, restricting development out of centre: - town centres are hubs of social community and transport networks and key to achieving sustainable patterns of development. Their continued health can be undermined by excessive retail development out of centre. It is however also necessary to ensure that the scale of development proposed in a centre relates to the role and function of that centre;
- Use conditions to regulate the total amount of retail floorspace in out of centre developments and to restrict the range of goods which can be sold, to protect the vitality and viability of “town centres”: - over time, out of centre developments can change character from one that is complementary to a town centre to one which is harmful;
- Recognise the role of retailing as a key contributor to a vital and viable town centre by encouraging the provision of shops in the “Core Retail Area”;
- Identify a range of suitable sites on which the demand for development might best be met, with particular emphasis on improved public transport links: - a Town Centre First policy will not be successful unless provision is made for meeting the identified demand in central locations. It is necessary therefore to both identify sites and a strategy for bringing those sites forward;
- Assess the impact of significant proposed expansions of retail floorspace on movement taking into account impact on road capacity and access to public

transport: - retailing can attract significant volumes of traffic and it is important to ensure there is sufficient road capacity to cater for this traffic, maximising accessibility by public transport in order to promote sustainable planning objectives;

- Improve access to town centres by facilitating opportunities for public transport, cycling and walking whilst also ensuring sufficient short term parking is available to meet the needs of car borne shoppers; - securing a sustainable pattern of retail development requires a reduction in the reliance on the private motor vehicle. This has to be balanced with ensuring a successful shopping centre which will necessitate accessibility by car for some shoppers;
- Include criteria based policies to guide developers on how to assess the potential of sites to accommodate new retail development, and to guide the determination of such applications; - in a plan led system it is important to provide flexible planning policies which are capable of being applied to different types of development at different stages in the life of the Plan. The factual circumstances against which applications are determined will change over time and criteria based policies will allow these changes to be taken into account when determining planning applications.

General Retail Strategy

- 6.24 This Retail Strategy has been developed in accordance with the Retail Planning Guidelines for Planning Authorities produced in January 2005 and is intended to follow the policy guidelines therein. The preferred location for new retail development where practicable and viable is within existing town centres (including district or major village centres) which includes those centres identified in Tiers 1 to 4 inclusive of both **Figures 6.1** and **6.2**, subject to the strategies for individual centres below. Where it is not possible to provide the form and scale of development required, having adopted an adaptable and flexible approach to appraising sites and buildings, development should be undertaken in accordance with the sequential approach both in the preparation of Development Plans and the determination of planning applications. It is emphasised that this summary is not intended to replace the approach set out within the Retail Planning Guidelines; however,

the following strategies for individual centres are intended to provide focussed strategies for the specific centres considered by this report.

Strategies for Individual Centres

- 6.25 The strategies for individual centres are now outlined. **Figure 6.1** overleaf shows the locations of centres throughout the Mid West.

Limerick City Centre

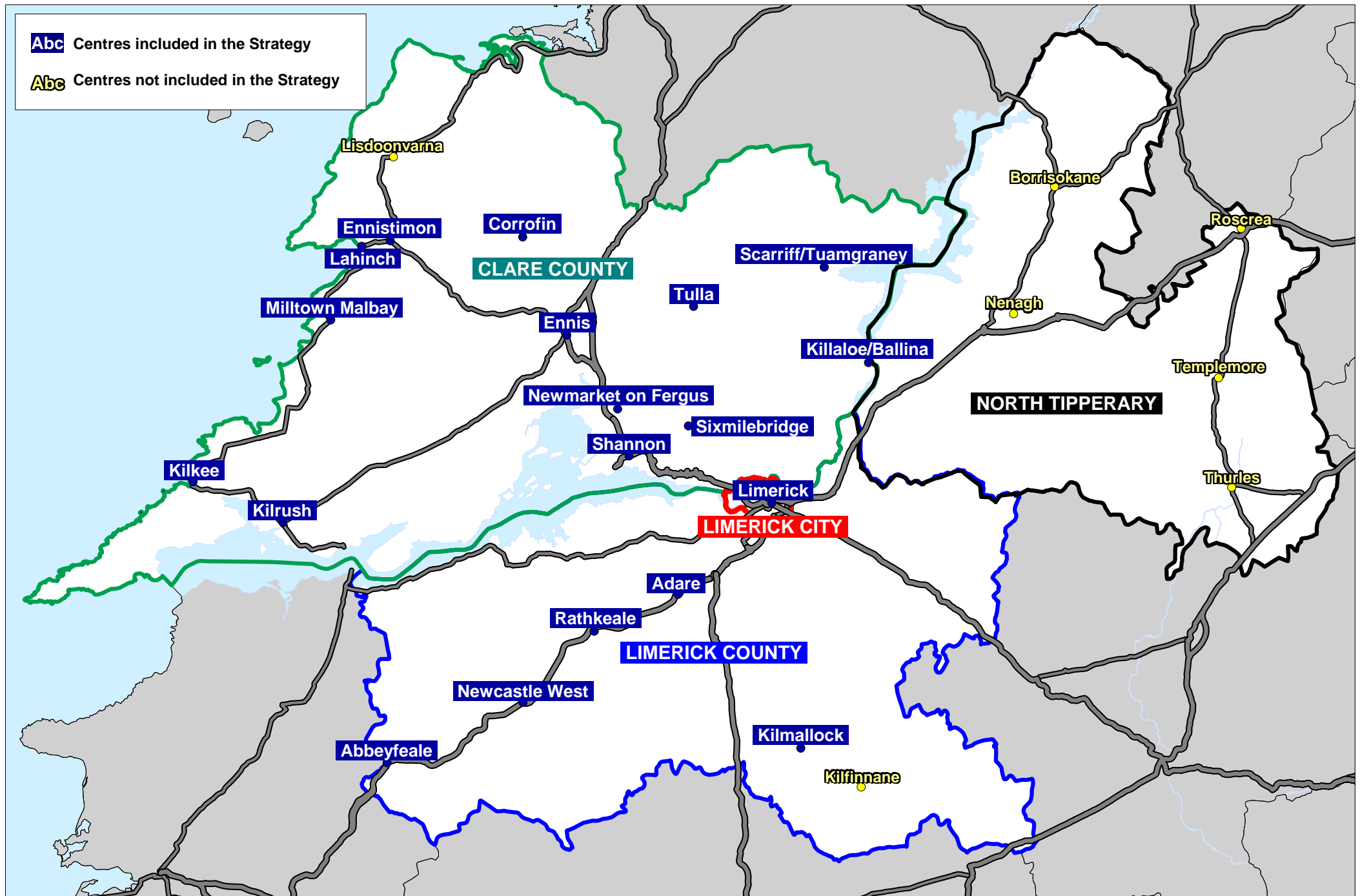
- 6.26 The shopping patterns within Metropolitan Limerick are complex due to the interaction between the city centre and the other centres within the urban area, in particular the Crescent Shopping Centre at Dooradoyle and Childers Road Retail Park. In the future it will be important to ensure that the retail function of Limerick City Centre is not further eroded or even supplanted by suburban and out of centre retail developments.
- 6.27 The strategy for Limerick City Centre should:-
- Protect and promote the City Centre's role as a National Tier 2 centre at the top of the Mid West hierarchy and a Gateway into Western Ireland;
 - Encourage the development of substantial new retail floorspace in the City Centre and extensions thereto, in order to allow the City Centre to recapture trade which it has lost to other retail schemes across Metropolitan Limerick, and to reconfirm its position as the dominant retail location in the region;
 - Adopt a proactive stance to help assemble sites and remove bureaucratic hurdles to facilitate retail development on complex urban sites.

Metropolitan Limerick

Dooradoyle (Crescent Shopping Centre)

- 6.28 The Crescent Shopping Centre is a very successful shopping destination. It has already expanded beyond the scale it should be, and as such it is not considered appropriate to increase the amount of retail floorspace in this centre any further due to its potential to

Fig 6.1 Location of Centres within the Mid West Region



detrimentally impact further on the City Centre. It is acknowledged that there could be qualitative improvements in the ancillary services which the shopping centre provides which would both benefit customers and could lead to aesthetic improvements.

6.29 The Strategy for Dooradoyle should:-

- Prevent any expansion of comparison goods floorspace as this would increase the centre's competition with Limerick City Centre;
- Prevent any expansion of convenience goods floorspace as this would create an imbalance in convenience retail provision in Metropolitan Limerick and could also increase the centre's competition with Limerick City Centre;
- Allow additional floorspace for ancillary facilities such as banks and other financial services, restaurants and public houses, offices and leisure, social and community uses.

District Centres

6.30 The Tier 2, Level 2 centres within the Limerick Metropolitan Area are predominantly convenience goods orientated comprising a large supermarket supported by a more limited range of comparison goods outlets and services.

6.31 They appear to be operating successfully and fulfilling their primary function, although the Parkway and, more particularly, the Roxboro Centres appear tired and in need of reinvestment. In the short term, it is possible there may be pressure for the regeneration of the Roxboro Centre, which should be supported in accordance with the growth strategy outlined in the regeneration programme, provided that it does not significantly increase the amount of retail floorspace nor alter the mix between convenience, comparison and services floorspace.

6.32 The strategy for the District Centres is:-

- The role and scale of the District Centres as primarily convenience shopping centres capable of supporting a main food shopping trip will be maintained;

- Reinvestment and regeneration of existing district centres will be supported but only provided where it does not change their role and scale;
- District Centres should remain primarily convenience goods and service centres, and should not develop into primarily comparison goods retail destinations;
- District centres should not be allowed to expand significantly above the 10,000 sq m size threshold set out in the Retail Planning Guidelines for Planning Authorities.

Out of Centre Development

- 6.33 Metropolitan Limerick has an extensive supply of out of centre retail warehouse accommodation, with a high level of vacancy in some parks. Much of this floorspace is unrestricted in terms of the range of goods which can be sold. Whilst much of the floorspace remains devoted to the sale of bulky comparison goods, a considerable number of units now sell non-bulky comparison goods in direct competition with the City Centre and other centres. Consequently, in accordance with the town centre first approach, there is no need to allocate or approve further out of centre retail floorspace at the current time. Whilst there maybe a need for further bulky comparison goods floorspace beyond 2016, this is sufficiently far off that a restrictive policy is appropriate until the Retail Strategy is next reviewed.
- 6.34 The quantitative retail floorspace assessment does not identify any material need for additional convenience goods floorspace over the study period for the region as a whole if existing commitments are built. As with comparison goods, therefore, there is no need to allocate or approve further out of centre floorspace. Whilst there may be local qualitative deficiencies to be rectified, a town centre first approach should be adopted to meet any such need.
- 6.35 The Strategy for out of centre development is:-
- Planning permission shall not be granted for the provision of any more out of centre retail floorspace;
 - New foodstores, including discount stores, should not be allowed to occupy out of centre sites but should be part of existing or new centres;

- New neighbourhood centres and/or local corner shops will be permitted to serve new areas of housing development or to meet areas of local deficiency.

Major Town Centres

Ennis

- 6.36 Outside Limerick Metropolitan Area, Ennis (County Clare) is the largest and most dominant of the other town centres. Being situated to the north west of Limerick on the main transport route between the coastal areas and the city, it is ideally situated to intercept shopping trips which would otherwise need to come in to Limerick City, or which would be lost to Galway. This is an appropriate function for a town of the size and importance of Ennis, one which achieves sustainable benefits as it reduces the distance shoppers need to travel for higher order comparison shopping on at least some of their journeys. Whilst it is appropriate that Ennis remains a smaller centre than Limerick, the challenge is to improve its retail representation, particularly through the provision of large modern shop units in the town centre, without harming its attractive historic character or having to resort to the creation of new shopping nodes for town centre products which will dilute its central comparison shopping function.
- 6.37 The quantitative assessment identifies a requirement for non bulky comparison goods floorspace and for convenience floorspace. Whilst there would appear to be quantitatively relatively little demand for further additional bulky comparison floorspace until 2016, it should be noted that existing facilities are located in dispersed locations, both in the town centre and out of centre, which have grown organically. Accordingly, there would appear to be qualitative benefits by encouraging a focus of bulky goods retail warehousing in designated sites out of centre which can be easily accessed by vehicular traffic and service delivery vehicles.
- 6.38 The strategy for Ennis should:-
- Seek to improve the suitability of town centre retail accommodation for modern retailers, whilst preserving the town's attractive historic character;

- Seek to accommodate the need for additional non-bulky comparison goods floorspace within or on the edge of the town centre, ensuring it is integrated into the existing shopping facilities;
- Encourage a new focus of out of centre bulky comparison goods retail provision in suitable areas, limiting the range of goods which can be sold from any new permission by condition to those that will not compete with the Town Centre;
- Accommodate the required additional convenience floorspace in a suitably located district centre if this cannot be achieved within the town centre;
- Harness the potential of any appropriate opportunity/brownfield sites within or adjacent to the town centre;
- Maintain and expand the attractive network of independent fashion boutiques and other speciality shops in the town centre, which combined with the character of the town and its public space creates a niche shopping experience for residents and tourists.

Shannon

- 6.39 Shannon sits at a position approximately midway between Limerick and Ennis and is therefore caught between the influences of the two largest shopping destinations in the region. It is a new town and is still developing in terms of new housing and infrastructure. It forms part of a linked Gateway under the NSS in conjunction with Limerick.
- 6.40 It operates at a lower level than Ennis Town Centre and whilst it retains a good representation of convenience goods retailing (ie Dunnes and the Lidl discount store - Tesco recently having relocated to Coonagh Cross) there is scope for improvement in the range of non-bulky and bulky comparison goods offered. This objective may be difficult to achieve given the extent of local competition, particularly if new comparison goods development comes forward in Ennis.
- 6.41 We are aware of aspirations to significantly increase the size of the comparison goods shopping offer on the back of the expenditure potential of the large workforce which commutes to the area daily and the presence of an international airport. It is unlikely that this aspiration will be commercially achievable in the short – medium term. Nevertheless, Shannon is a developing settlement and the proposals in the Masterplan to extend the

town centre should be supported. The extension should focus on 'walk to' and 'daily' shopping, enhancing the range of convenience and comparison goods traders in the centre. At present Shannon has very little representation of "bulky comparison goods" outlets and there would be sustainable advantages to establishing some provision to meet local needs so as to reduce the need for residents to travel to either Ennis or Limerick. Such provision should however be related to the Masterplan proposals so as to help bring forward the aspiration to extend the town centre to the north. Development of such provision elsewhere is likely to impact detrimentally on the ability to implement the Masterplan in the short term.

6.42 The strategy for Shannon is to:-

- Support the continuing improvement of retail facilities in Shannon Town Centre through the delivery of the adopted masterplan;
- To encourage the growth of retail floorspace so that the town centre can improve its quality of service to its local catchment area;
- To investigate whether it is possible to create a distinct shopping character for the town centre to increase its attraction to tourists particularly those using the airport and given its status as a linked Gateway.

Newcastle West

6.43 Newcastle West is the largest centre in County Limerick and is strategically well placed between Limerick and Tralee and Charleville to the south to benefit from a relatively extensive catchment area. Whilst there are two Supervalu supermarkets situated in the town centre, the centre is primarily devoted to the sale of comparison goods and the provision of local services. As with Ennis, the challenge is to accommodate the provision of new retail floor space of a type suitable to meet the needs of modern retailers, without undermining the continued strength of the town centre. Most traders are however local independent operations and so the provision of larger floor plate units is not so critical to the continued vitality and viability of the centre, at least in the short term. It should remain, however, an objective for the longer term.

6.44 The strategy for Newcastle West is:-

- Support the improvement of retail facilities in Newcastle West Town Centre through the provision of modern shop units and a modest growth in floorspace;
- Maintain its mixed role and function.

Town Centres

Kilrush and Abbeyfeale

6.45 Abbeyfeale and Kilrush are both identified as Tier 3, Level 1 centres. They both share characteristics, being attractive historic market towns with a good range of both convenience and comparison goods retailing with the potential for future enhancement. Given their respective locations (Abbeyfeale being situated between the larger centres at Newcastle West and Tralee, and Kilrush being situated on the coast) the potential for enhancement lies in modest scale improvements to the existing provision and/or trying to improve their tourist/visitor attraction.

6.46 The strategy for Abbeyfeale and Kilrush is:-

- Support the improvement of retail facilities in Abbeyfeale and Kilrush Town Centres so as to improve the service they provide to their local catchment populations;
- Encourage the provision of tourist and visitor orientated retail provision to capitalise on the inherent potential of these centres.

Ennistymon, Killaloe, Scariff, Adare, Killmallock and Rathbeale

6.47 The Tier 3 Level 2 centres tend to have a more limited offer of comparison products, typically lower order, and their primary function is the provision of convenience goods and everyday services. Adare, Ennistymon and Killaloe offer the best range of convenience products, and also benefit from their tourist and visitor attraction, which allows them to support a wider range of comparison goods than would be justified by their local catchment population. Killmallock also has the potential to benefit from visitor expenditure. The primary objective for these centres is to enhance the quality of their convenience

goods provision enabling the construction of modern food store outlets, such as has already been provided in Ennistymon (Supervalu) and Killaloe (again Supervalu). Convenience retail provision in Rathbeale could be improved, whilst Scarriff does not have any reasonable scale convenience retailing in the town which is likely to increase the propensity for local shoppers to travel to larger supermarkets for their weekly/monthly shopping trips. Sustainable benefits in terms of reducing vehicle miles travelled can therefore be achieved through providing improved facilities in these towns. Additionally, where towns have an established tourist and visitor function, the provision of associated tourist orientated retailing should be supported to encourage the tourist industry.

6.48 The Strategy for Ennistymon, Killaloe, Scarriff, Adare, Killmallock and Rathbeale is to:-

- Support these towns as important centres for the provision of convenience goods and retail services;
- Encourage the provision (where not already provided) of good quality convenience outlets capable of supporting a main food shopping trip in or on the edge of the town centre;
- Support the provision of non bulky and bulky comparison goods outlets in the town centre where these are aimed at meeting the needs of the local catchment population.

Neighbourhood and Village Centres

6.49 Within the Metropolitan Area these centres comprise small local parades with very limited car parking which meet the daily needs of a very local area. Their function is extremely important locally to meet 'top-up' convenience goods shopping needs (ie those products which need replacing between main food shopping trips) and to provide local services, including the provision of takeaway food. From a policy perspective they are also important as they constitute a sustainable provision of retailing, removing the need to travel and also thereby reducing levels of congestion.

6.50 Outside of the Metropolitan Area these small centres also fulfil an important role for their rural catchment population for similar reasons. Whilst it is unlikely that these centres will attract sufficient expenditure to support large scale provision of retail or comparison goods,

they remain an important focus of the community and consequently their continued vitality and viability should be supported. The focus of provision will be on ensuring the creation of new floor space which meets the needs of local people, whether that be the construction of additional units to meet retailer demand, or the qualitative improvement of existing floor space to allow an enhanced level of services to be provided. In either case, it is unlikely that the scale of development in these centres will ever be such that it will undermine the continued vitality and viability of any higher order centres, or other centres at the same level in the retail hierarchy due to the distance between centres.

6.51 The strategy for neighbourhood centres, small towns and village centres is to:-

- Support the provision of modern convenience goods stores, of an appropriate scale, and associated retail and service units to enable these centres to meet the day to day needs of their local catchment population.

Local Shops

6.52 Local and corner shops meet the daily needs of local people. These facilities can be either provided independently, perhaps along a major arterial route or within new residential areas, or in conjunction with other services such as a petrol filling station. Again the focus of these stores is on the provision of very local level day-to-day needs and provided that this function is met, it is unlikely ever to be of a scale which will have any material impact on town centres at any level in the hierarchy.

6.53 The strategy for local shops is:-

- To support the provision of small scale shops to meet the day to day requirements of local people;
- Promote local shops to meet a gap in provision where this would achieve regeneration benefits.

Implementation Strategy

- 6.54 As a first step Limerick City Council, Limerick County Council, Clare County Council (and its constituent Town Councils) are required to adopt this strategy as part of their Development Plans (by Variation if necessary to existing plans). This Strategy will replace the existing Mid West Retail Strategy 2003 and the above County/City Council Strategies. All Development Plans should ensure that policies and objectives fully reflect this revised 2008-2016 Strategy.
- 6.55 One of the implications of seeking to deliver an integrated approach to retail development across the Mid-West Region, particularly in Metropolitan Limerick, is the need to facilitate and integrate into the planning framework greater opportunities for cross-boundary co-operation. Retail catchment areas by their nature extend across administrative Council boundaries and consequently developments in one Local Authority area can have a significant impact on the vitality and viability of centres in an adjoining council area. As part of the overall co-ordinated approach sought by this strategy, it is essential that each Council incorporates a set of principles for co-operation and consultation regarding the impact of retail proposals across administrative area boundaries.
- 6.56 Such co-operation will allow for proposals to be considered fully, facilitating the input of adjoining councils through consultation submissions on an application, allowing the impact of new schemes to be assessed across all existing town centres, regardless of which Planning Authority area they fall.

Proposals for Continued Monitoring

- 6.57 This Retail Strategy has been prepared on the basis of a snapshot of the base line information available in 2009, projected forward using the best available information and techniques. The retail sector is, however, a dynamic one, dependent not only upon the national economic climate but also upon how particular towns are faring in respect to their neighbours. The objective of a planned approach is to ensure provision of retail facilities in accordance with the principles of sustainable development and which meet the needs of local people. It is therefore essential to monitor how the strategy is performing in terms of actual provision, and also whether the base line assumptions are being borne out in the

future economic climate. Accordingly, it is recommended that the following factors are monitored on a regular, if not annual, basis:-

- **Population Growth** – increasing population is one of the primary determinates of the need for additional retail floor space. It is recommended that projections of population growth adopted in the quantitative retail floorspace assessment are reviewed on a regular basis.
- **Expenditure Growth** - Estimates of expenditure per person are also important to assessing the need for new retail floorspace. Such estimates can change significantly with fluctuations in the national economy. It is recommended that levels of annual growth be reviewed on a regular basis.
- **Existing Retail Floor Space** – the quantum of existing retail floor space is one of the key inputs into the quantitative retail floorspace needs assessment. This report has verified the floor space figures utilised by DTZ and updated the information to (March) 2009. It is recommended, however, that prior to the next review of the Retail Strategy, a specific floorspace survey be undertaken to more accurately measure existing retail floorspace. The assessment should seek to differentiate between:-
 - net comparison goods sales floorspace - split between non-bulky and bulky comparison goods;
 - convenience sales floor space;
 - retail services (eg travel agents, hairdressers, book makers);
 - banks and other financial and professional institutions;
 - pubs and restaurants (including takeaways);
 - vacancies (number and distribution broken down by former use where known).
- **Changes in Retail Floorspace** - a register of new retail planning permissions should be maintained. It should categorise development by the type of goods sold (non bulky, bulky and convenience), the gross and net floorspace, including

net additional floorspace where an existing retail facility is redeveloped, and should identify any restrictions on the range of goods which can be sold.

- **Commercial Indicators of Vitality and Viability** – it is possible to obtain other indicators of how centres are functioning, in particular rental levels, yields and retailer requirements. These indicators are notably uncertain in the current economic climate but as a generality provide an indication as to how a centre is performing over time and in comparison with other centres. A time series database should be established to allow comparison between centres on an established set of parameters over time.
- **Shopping Patterns** – The shopping patterns identified by the (2009) household survey will change over time due to improved transport facilities and the development of new shopping provision, or the improvement of existing retail facilities. The survey should therefore be updated so as to allow the impact of changes in provision to be identified. A five year review period is considered appropriate.
- **Town Centre Healthchecks** – in order to develop and maintain an understanding of how centres are performing and changing over time, regular town centre “healthchecks” should be undertaken to augment the commercial indicators of vitality and viability. Again the key objective is to collect data on a range of indicators which can be used to undertake a time series analysis for an individual centre and allow comparison with other centres. The range of indicators on which data is collected is extensive. However, the main ones are set out overleaf. As a minimum it is recommended that data is collected on the number and types of occupiers and the number of vacancies.

Town Centre Healthcheck Indicators

- Diversity of town centre uses;
- The amount of retail floorspace in centre, edge of centre and out of centre;
- Proportion of vacant street level property;
- Gaps in retail provision;
- Environmental quality;
- Accessibility;
- Views of retailers;
- Views of shoppers;
- The perception of safety and occurrences of crime.

6.58 As a further option, the preparation of trader plans for each centre to show the names and type of business present is also recommended. Whilst these plans can be time consuming to produce in the first instance, they can subsequently be updated quickly. Their benefit is that they provide an easily referenced pictorial record of retailers and other uses present in a centre, where they are located and how that representation changes over time. This information can greatly assist in analysing how a centre fares in the light of new competition and/or changes in planning policy, and identifies any gaps in retail provision.

Development Management

6.59 The development management process is fundamental to delivering a successful Retail Strategy. The failure at this stage to fully examine the issues highlighted and recommendations will result in the revised Retail Strategy having little meaning except at a very general level. For this Strategy to have a real impact, it is important that each Council incorporates the strategy into their Development Plans and, when exercising their powers and deciding on planning applications, take into consideration both the impact of the development itself, and the development in conjunction with other recently approved or proposed developments, on the retail sector, both within their own administrative area and on centres within the administrative area of adjoining Councils.

(a) Retail Need

- 6.60 Whilst it is not a requirement of the 'Retail Planning Guidelines for Planning Authorities' that planning applications are supported by retail need assessments, due to the current level of provision in the Mid West Region it is considered that such assessments should form part of the retail impact assessments. A lack of quantitative retail need is indicative that a proposal will have a greater impact than if there is a need. Such assessments therefore provide a useful context against which to consider the material impact consequences.
- 6.61 Need assessments should consider both the quantitative and qualitative need for a proposal and examine the scope to increase the market share of a centre and/or for regeneration benefits to be achieved.

(b) Sequential Test

- 6.62 The sequential test should be stringently applied to the assessment of all retail proposals other than those intended to serve a local population. It is a fundamental part of the national retail strategy to seek to direct new retail development to town centres and thereby capture the benefits that this can bring forward in terms of protecting and enhancing existing centres, sustainable development and social inclusion. It is important to ensure that the scale and function of the proposed retail development accords with that of the centre in which it is to be situated.
- 6.63 When seeking to incorporate this strategy into their development plans, Planning Authorities are encouraged to work with stakeholders to identify a range of sites to meet either the quantitative or qualitative improvements needed over the plan period. In order to be effective, flexibility and realism are required from both local Planning Authorities and developers.
- 6.64 In planning terms, developers and operators should be able to demonstrate that in undertaking the sequential test, they have been flexible about their proposed business models in terms of:-

- The scale of their development;
- The format of their development;
- Car parking provision; and
- The scope for disaggregation.

6.65 In seeking to demonstrate flexibility, developers and operators should consider the scale of the proposed development, perhaps reducing the retail floor space proposed or considering more innovative layouts and store configuration such as multi-storey developments with a smaller footprint. Reduced or re-configured car parking should also be a priority, especially in areas which are usually accessible by public transport.

6.66 When seeking to demonstrate that certain sequentially preferable sites are not appropriate, applicants should provide clear evidence to demonstrate why in the following terms:-

- Availability: the sites are not currently available and are unlikely to become available for development within a reasonable period of time (to be determined by the relevant Planning Authority but typically five years);
- Suitability: sites are not suitable for the type of development proposed;
- Viability: the development would not be viable on the proposed site due to the costs of construction/implementation.

6.67 The amount of information necessary to demonstrate compliance with the sequential test should be proportionate to the scale of the development proposed. Whilst all retail applications apart from small shops and neighbourhood centres should be supported by a sequential test assessment, development in excess of generally 2,000 sq m (gross) in the Metropolitan area and generally 1,000 sq m (gross) in the remaining area located on the edge or out of identified town centre locations, should provide a more detailed retail impact assessment.

(c) Retail Impact Assessments

6.68 It is not the purpose of the planning system to prevent competition. However, it is appropriate for planning policies to promote healthy town centres in the public interest. Where new developments would compromise this goal, they should be rejected.

6.69 The National Retail Planning Guidelines place the onus on the applicant to demonstrate there will not be a material adverse impact on the vitality and viability of any existing town centre arising from their development. Applicants should therefore address the following criteria and demonstrate whether or not the proposed development would:-

- support the long term strategy for town centres as established in the Development Plan and not materially diminish the prospect of attracting private sector investment;
- cause an adverse impact on town centres, either on its own or cumulatively with recent developments/extant planning permissions, sufficient to undermine the quality of the centre or its role in the economic and social life of the community;
- diminish the range of activities and services a town centre can support;
- cause an increase in the number of long term vacancies in the primary retail area;
- ensure high standards of access by a range of means of transport including public transport, by bicycle, by foot and also by the private motor car, so that the development is accessible to all sections of society;
- link effectively with existing town centres so there is likely to be commercial synergy.

6.70 The level of detail provided in a retail impact assessment should be proportionate to the scale and nature of the proposal and should focus on the key issues.

(d) The Use of Conditions

6.71 Effective use should be made of conditions to define the terms of new planning permissions to ensure they accord with the Retail Strategy Vision. Conditions may be imposed to:

- Prevent retail development from being sub-divided into a number of smaller shops; or to specify the maximum size of units;

- Limit the maximum amount of floorspace (especially that devoted to retail trading) which can be provided. For the purposes of clarity the ability to erect mezzanine floors within the buildings should be removed;
- Define the range of goods which can be sold with reference to specific goods types.

Summary

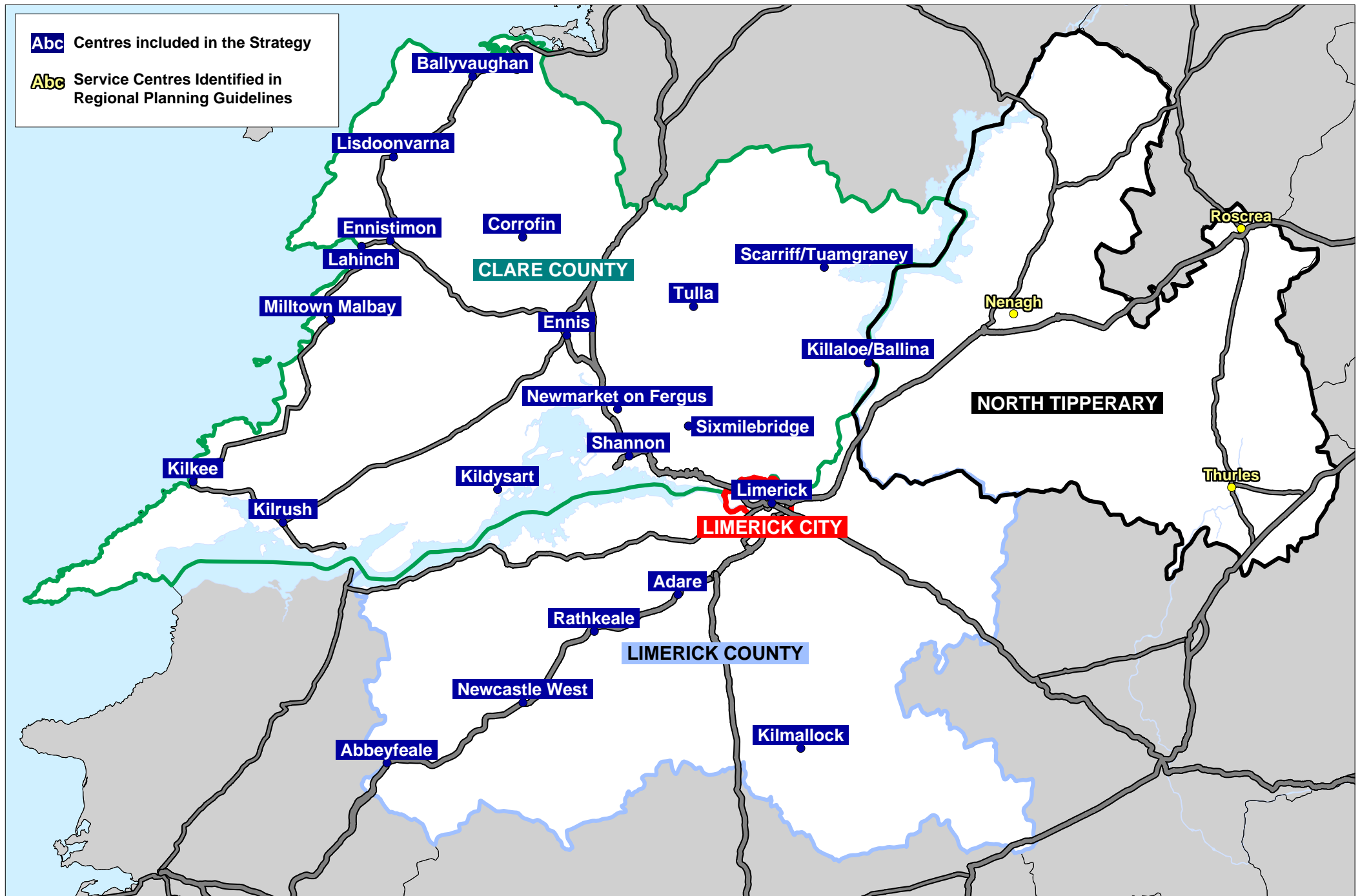
- 6.72 The Mid West region has reached an important crossroads. Further large scale retail development will result in, possibly irreversible, detrimental impacts on some centres. Limerick City Centre has already suffered from increased competition and other centres could suffer similar problems in the future. It is essential for the provision of new retail development to be coordinated across the region to create a balanced pattern of provision in accordance with the broad objectives of the National Development Plan, in particular sustainable national economic and employment growth and the promotion of social inclusion.
- 6.73 The new Retail Strategy emphasises the importance of Limerick City Centre. It is important that it maintains its dominant retail function at the top of the Mid West hierarchy and recaptures some of the market share it has lost to other centres, especially the Crescent Shopping Centre and to other out of centre retail destinations, such as the Childers Road Retail Park.
- 6.74 Accordingly, Strategy is recommended which has a bias in favour of Limerick City Centre in order to provide it with sufficient protection that as the economy recovers, developers will consider it worthwhile spending the time and effort to undertake the more complex site assembly activities essential to bring forward development.
- 6.75 In order to implement this Strategy, restriction on the development of further retail floorspace at Dooradoyle is recommended, and the maintenance of the scale and function of the existing Tier 3 centres. There should be no further permissions granted for new or extended out of centre retail provision.

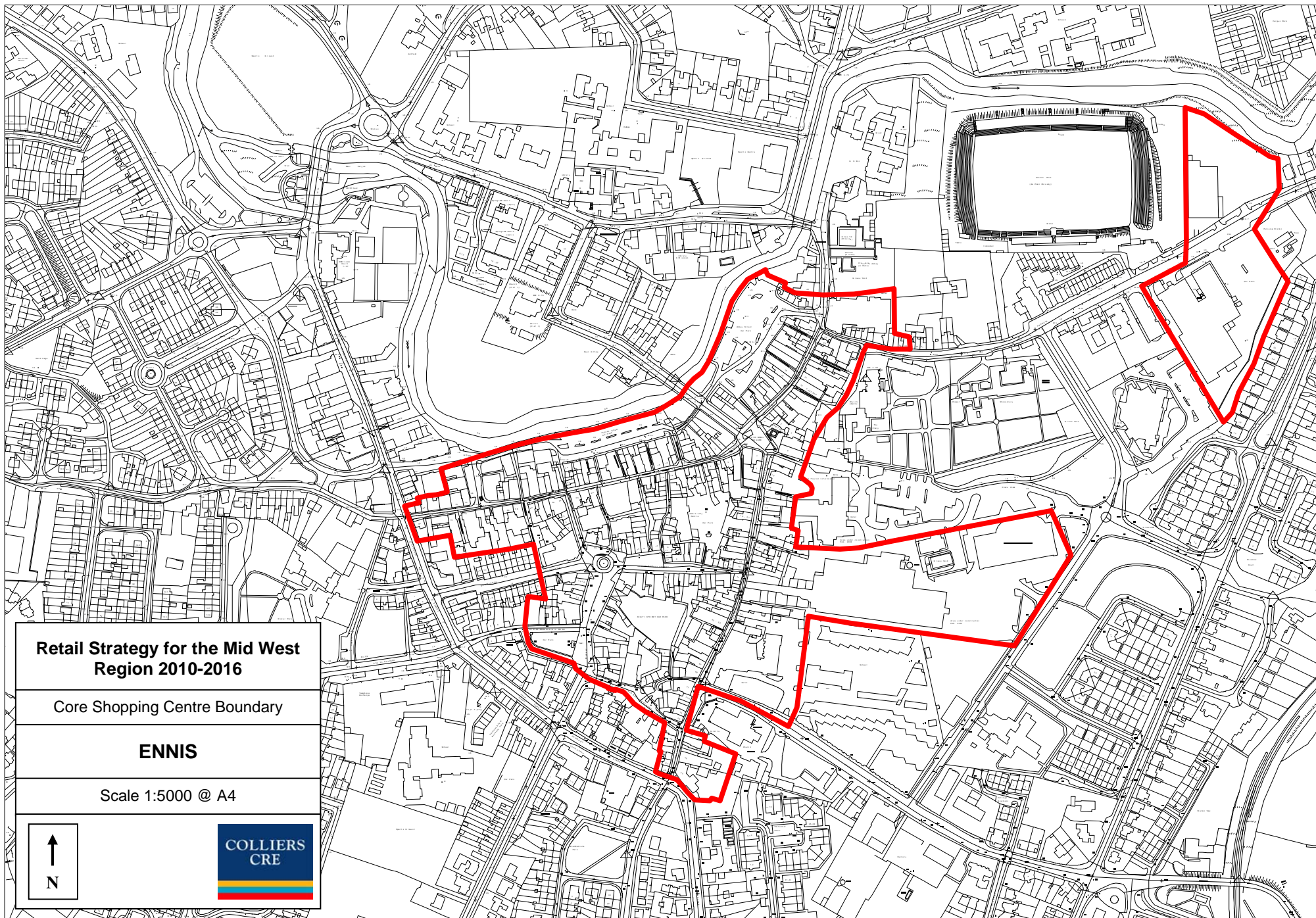
- 6.76 The improvement of Ennis Town Centre to provide modern retail accommodation is also supported, as is the provision of a more focussed bulky comparison goods provision in suitable designated areas.
- 6.77 The intention to improve and expand the shopping provision as set down in the Shannon Masterplan is supported. However, for this to be successful, new retail development must be focussed and well related to the existing town centre.
- 6.78 In general, the Retail Strategy seeks to encourage appropriately scaled new retail development in the town centres of the principal towns in the region.
- 6.79 Elsewhere, significant changes in the role and function of the identified centres are not anticipated. However, allowance should be made for them to improve their retail provision in accordance with their existing role and scale, so that they can continue to improve their service to their local catchment population.
- 6.80 This approach should result in a balanced pattern of retail development, allowing each centre to fulfil its role without having a harmful impact on its neighbours.

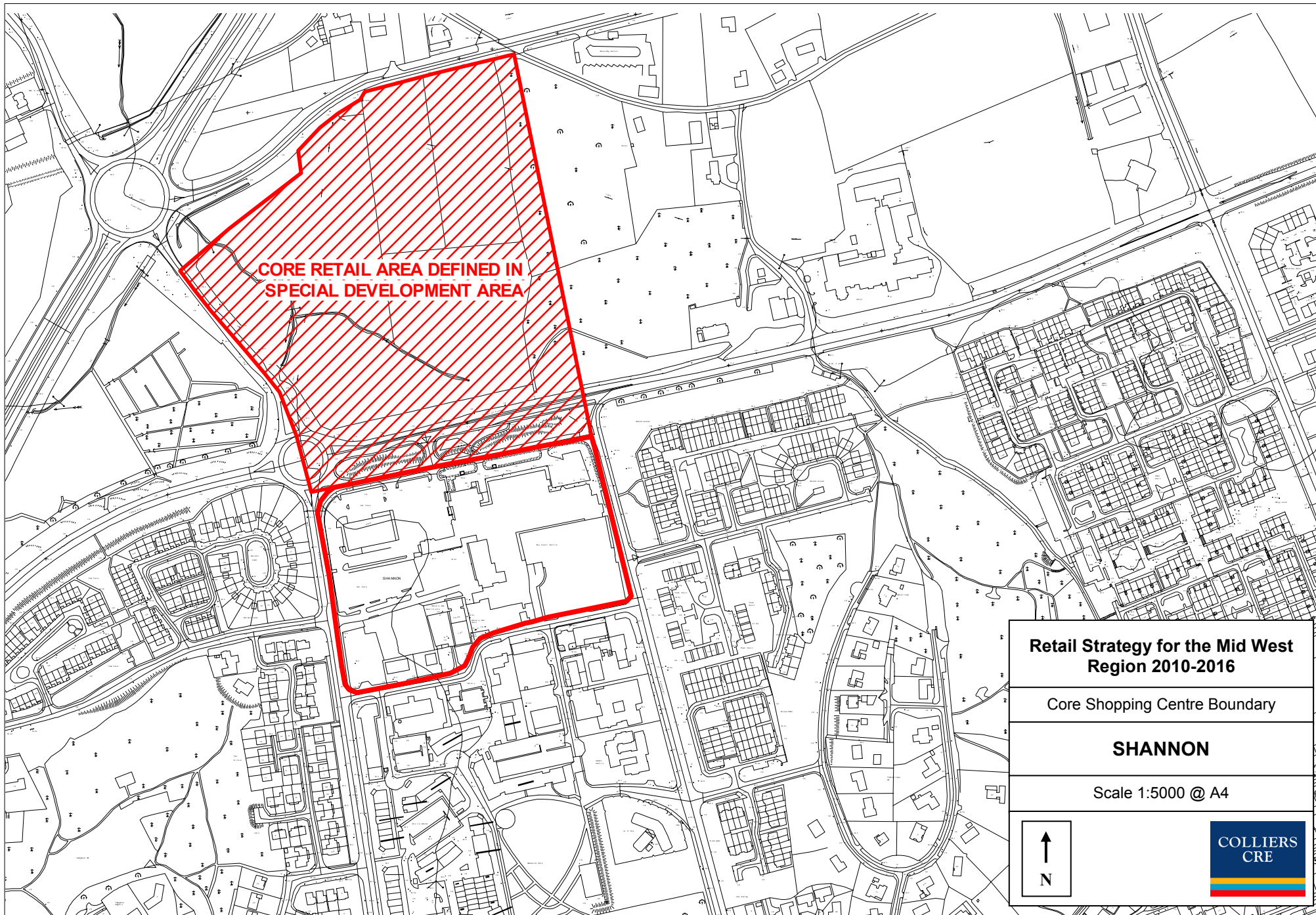
Maps

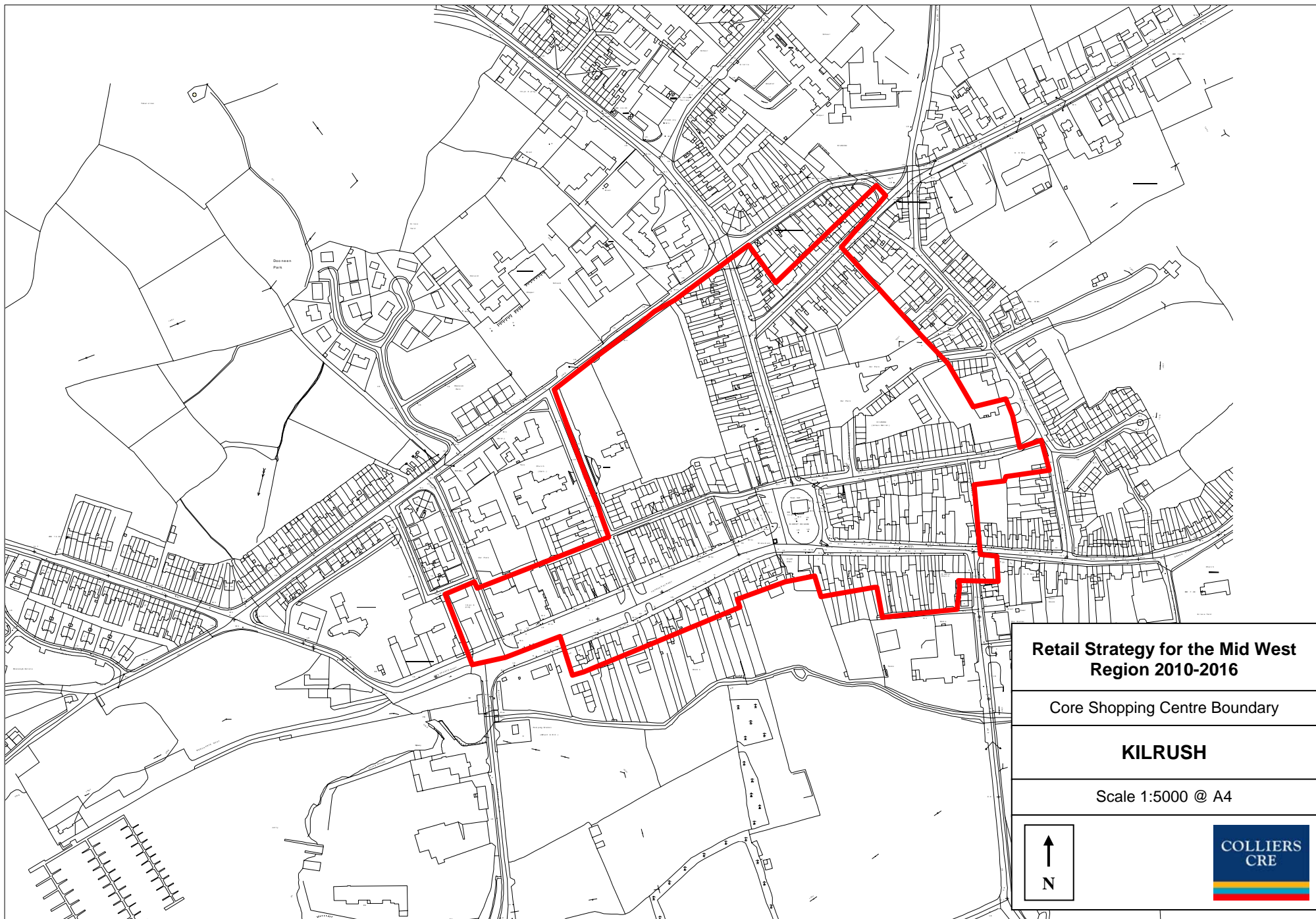
- 6.81 A series of maps showing the proposed changes to the city and town centre boundary are reproduced overleaf.

Fig 6.1 Location of Centres within the Mid West Region









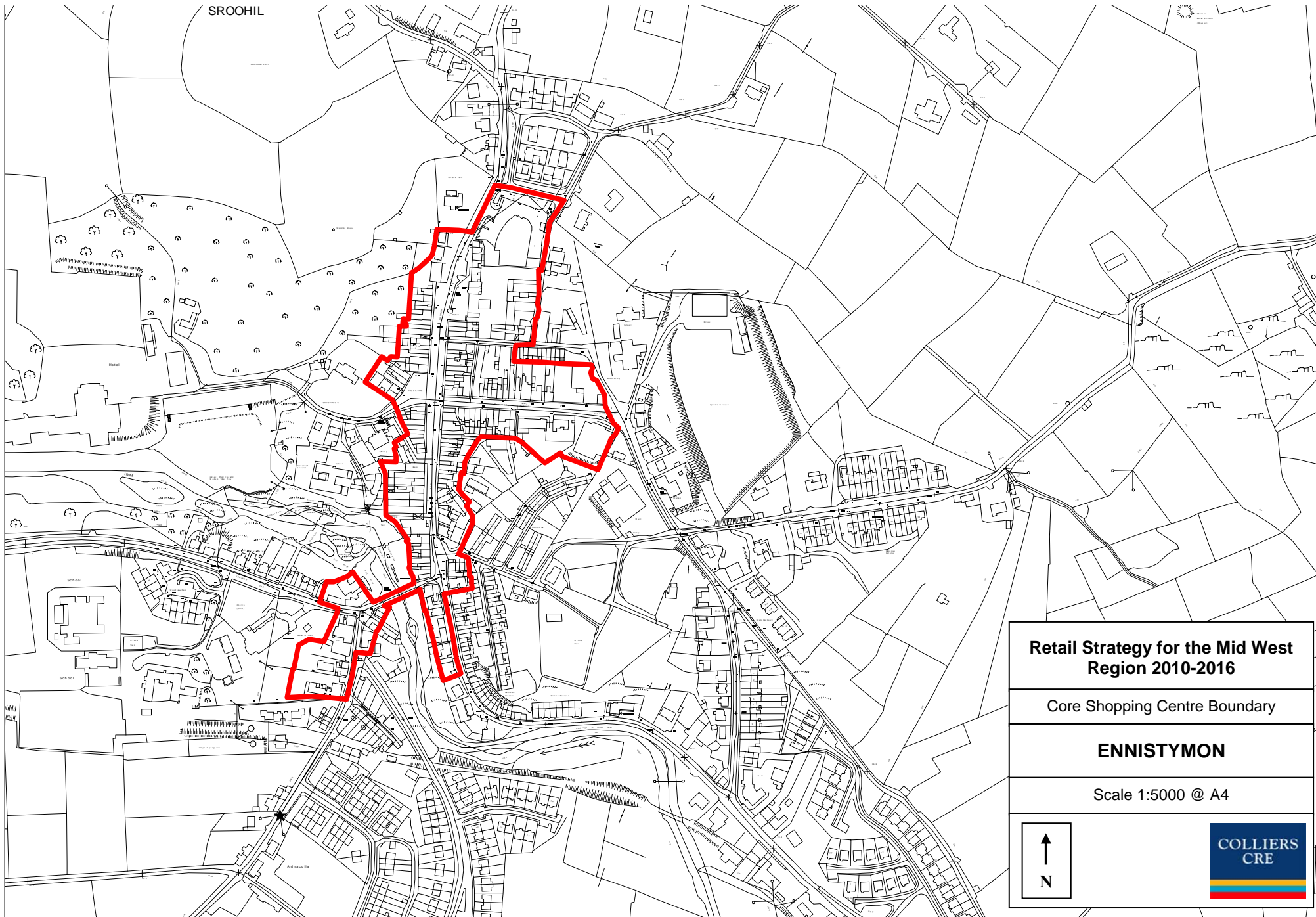
**Retail Strategy for the Mid West
Region 2010-2016**

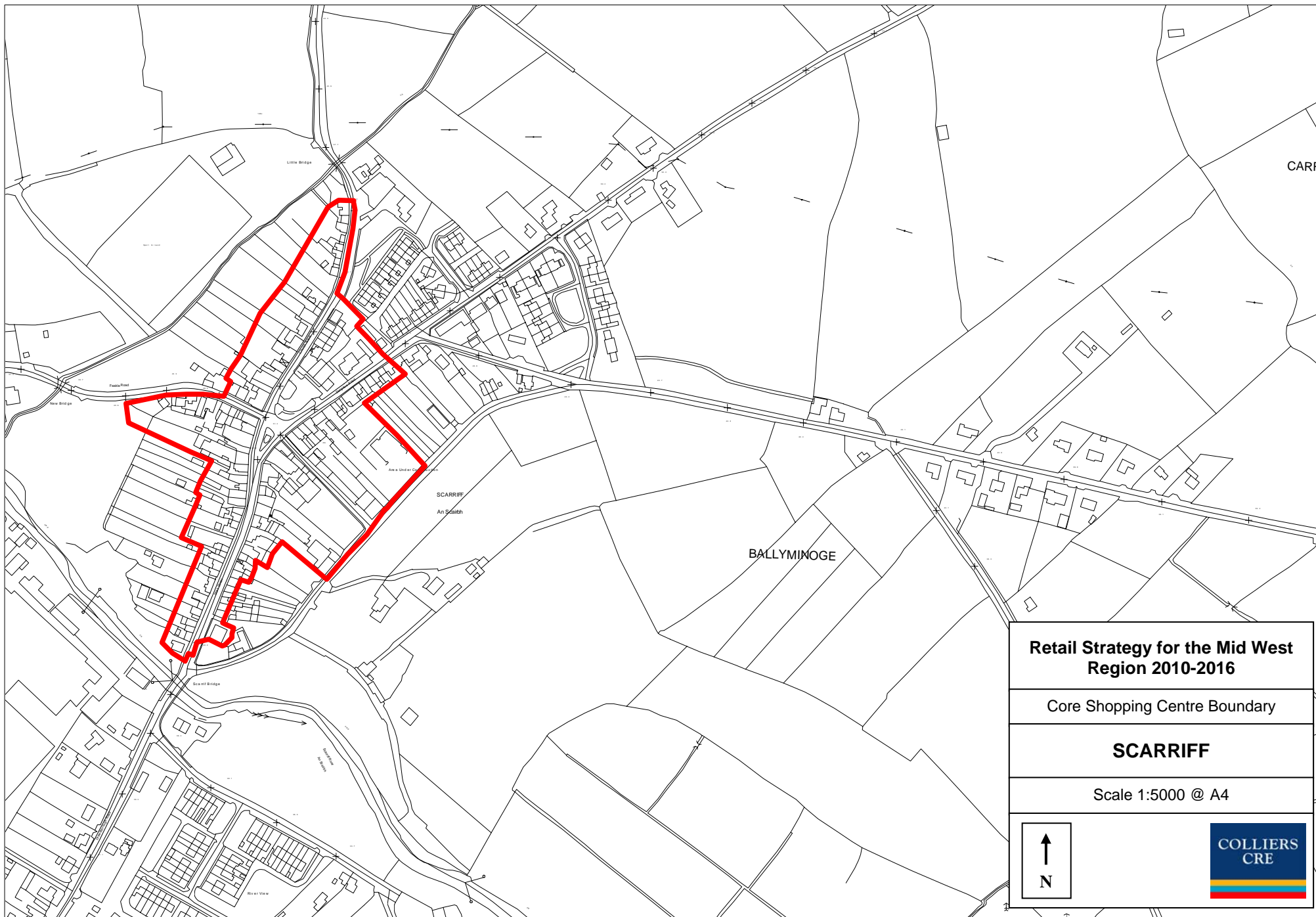
Core Shopping Centre Boundary

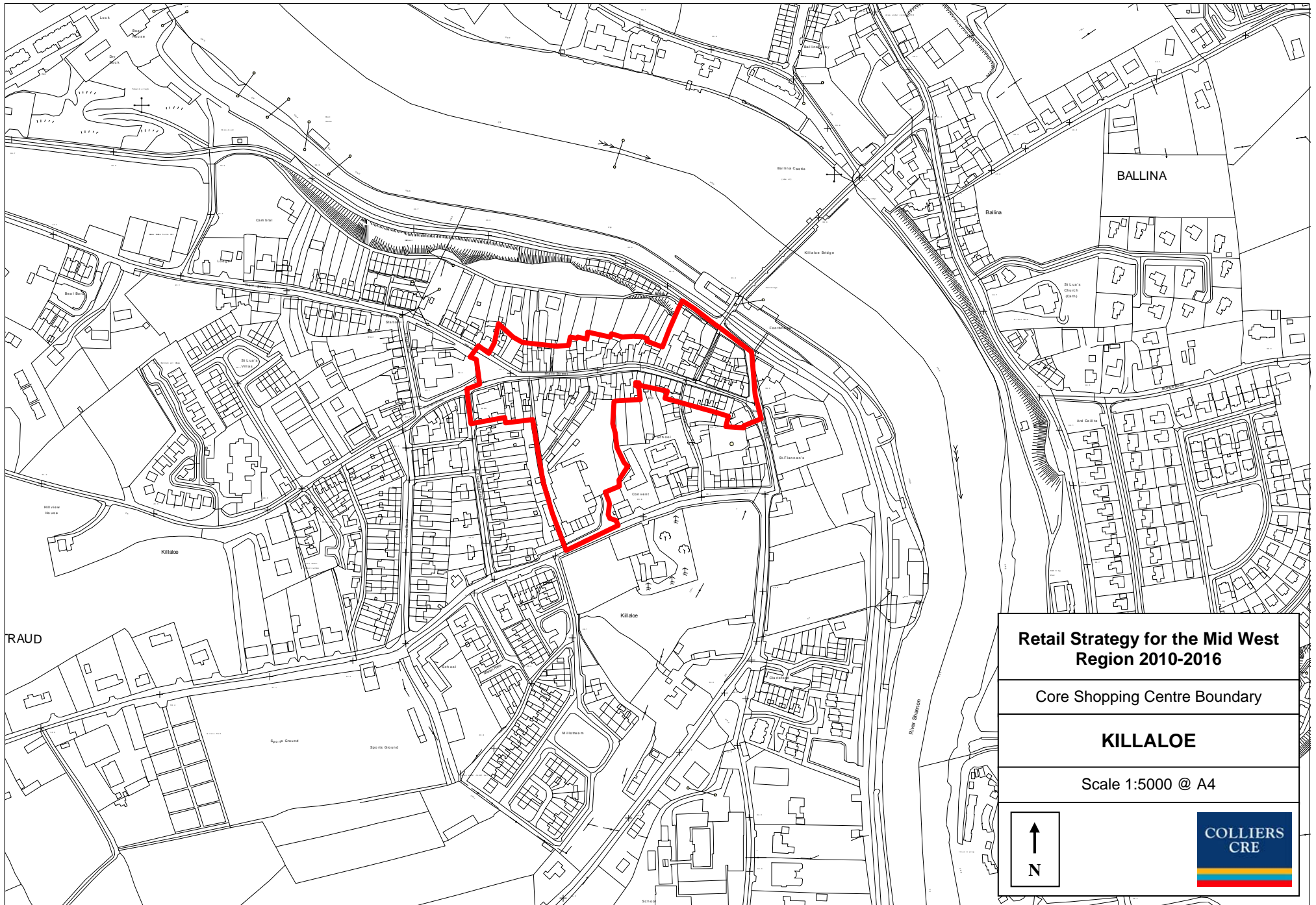
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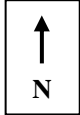

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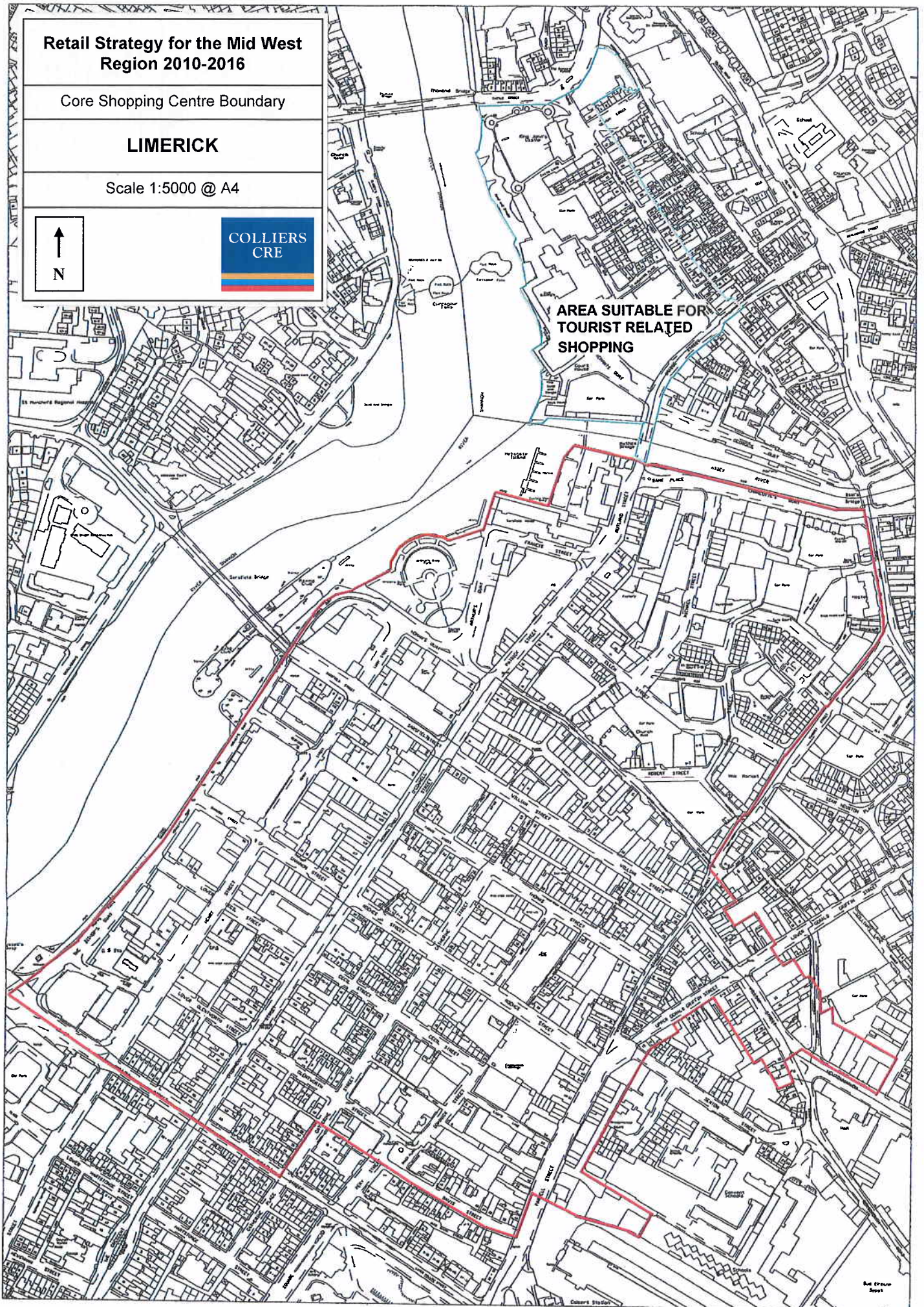


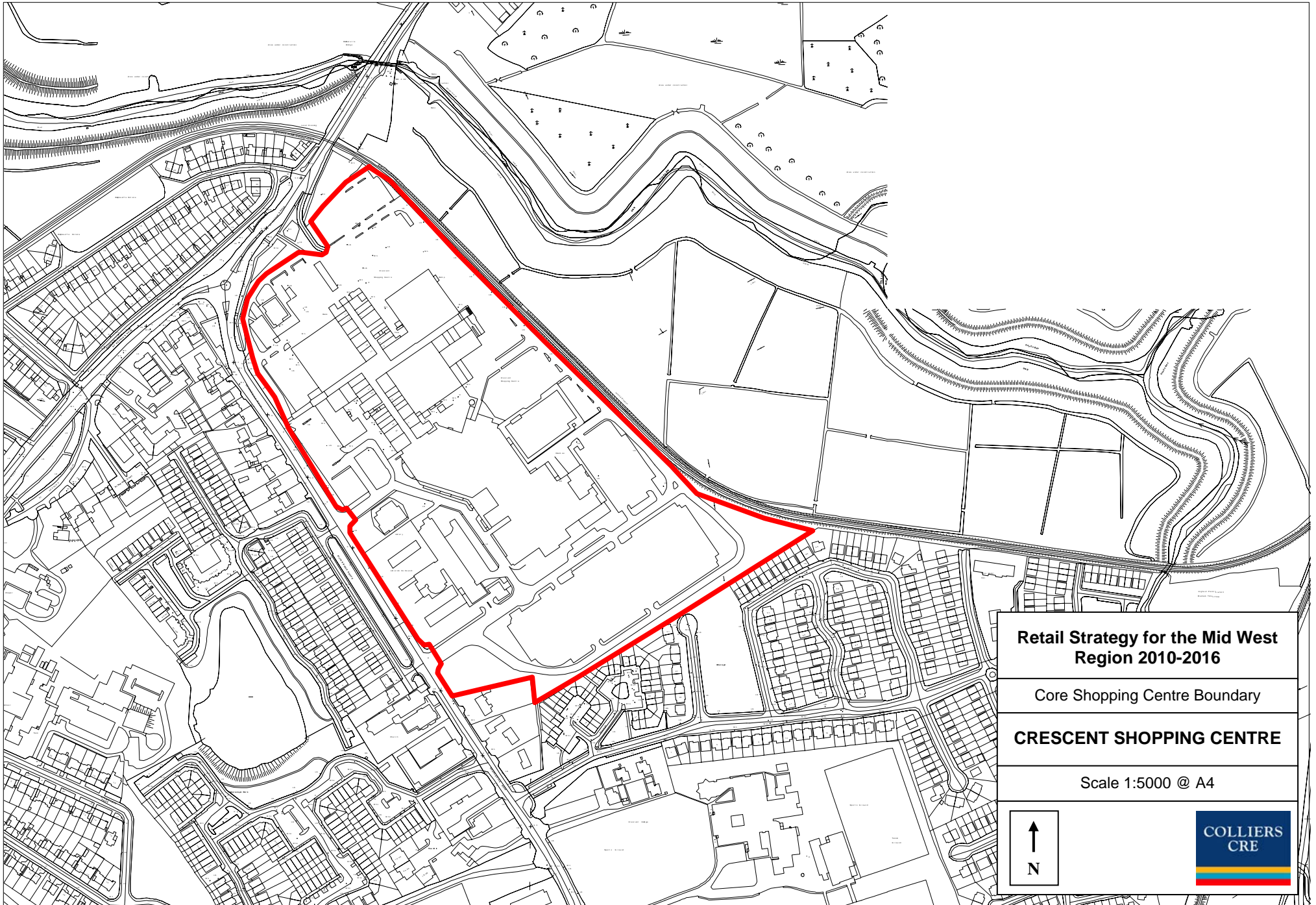


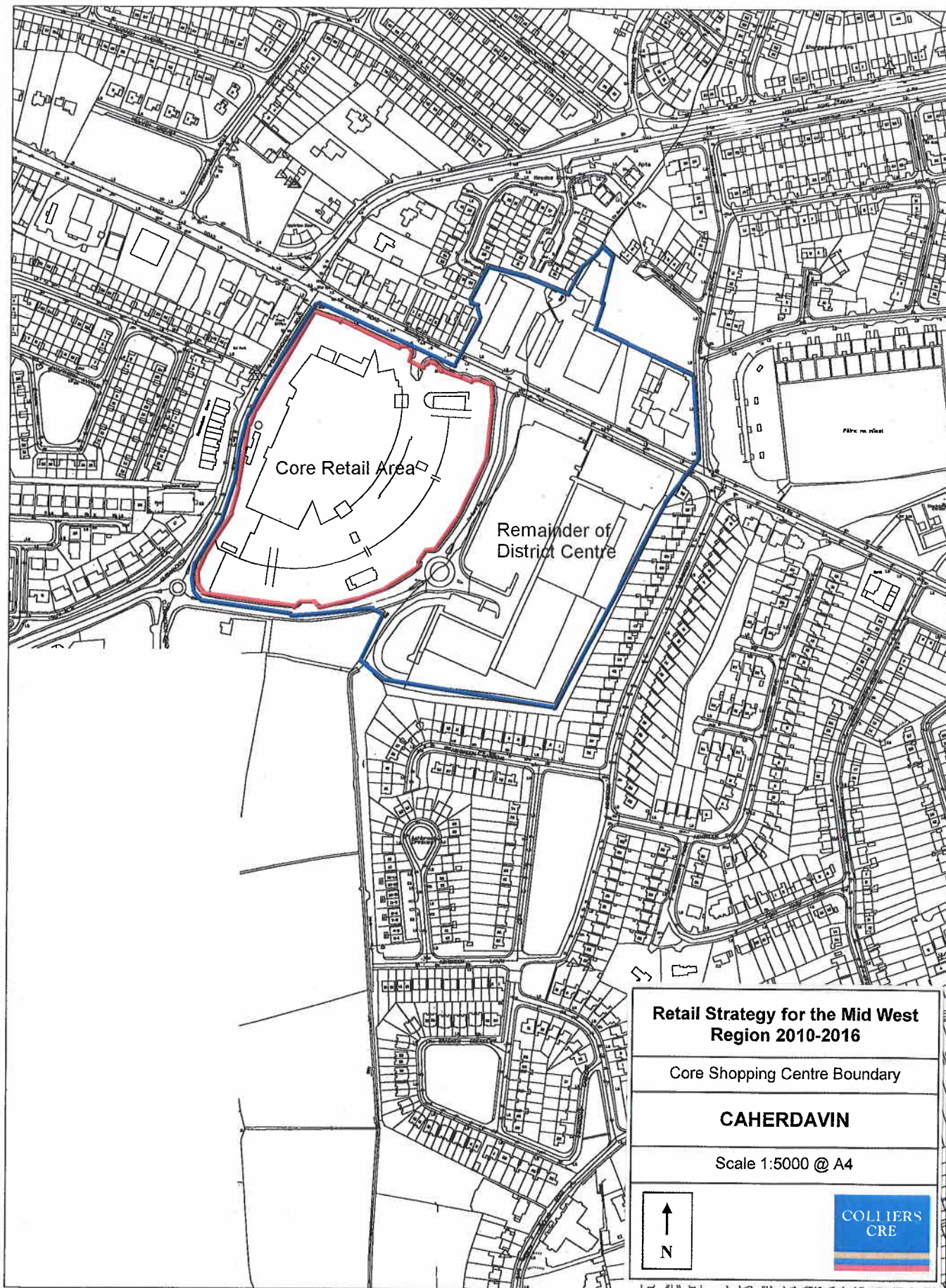


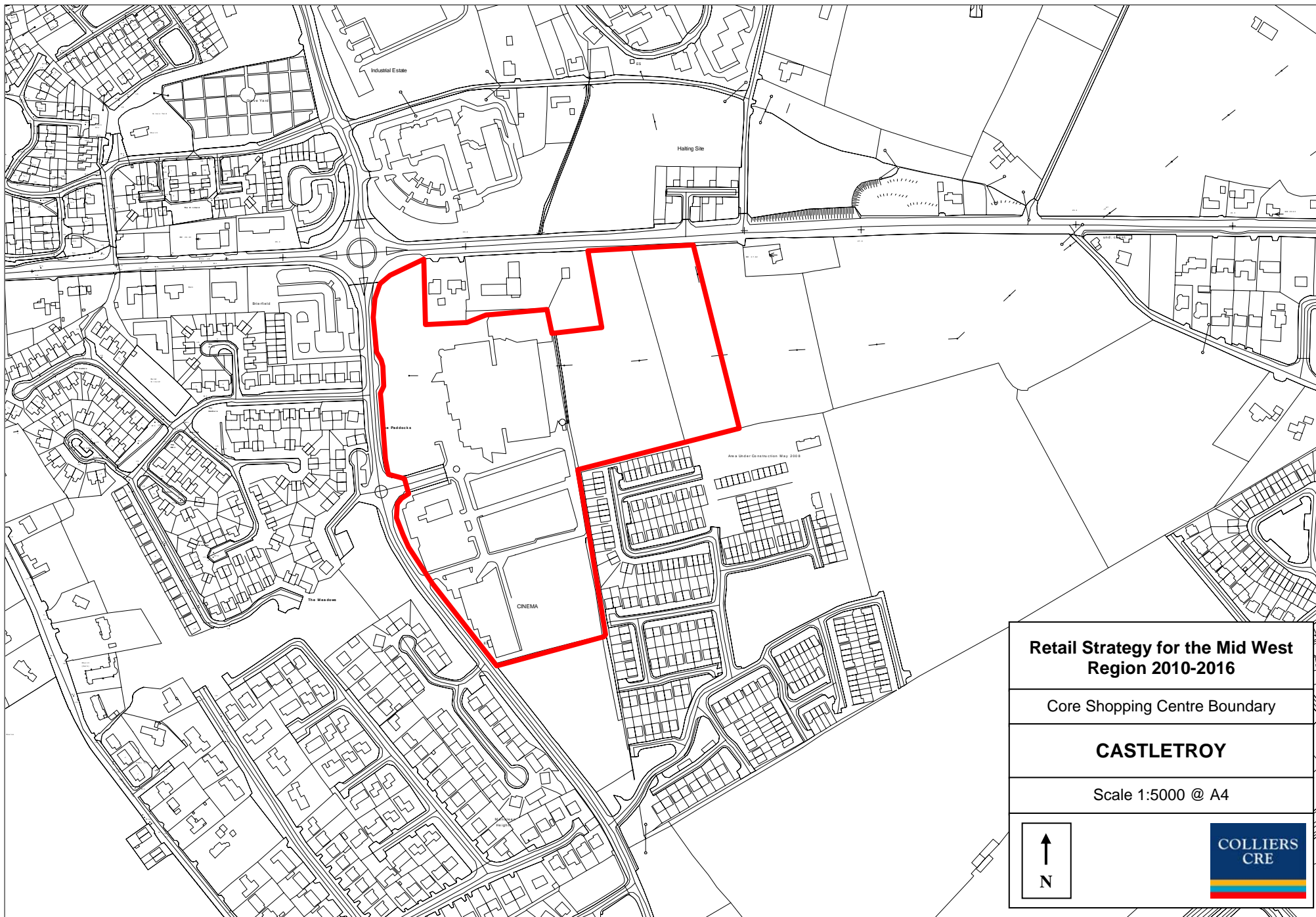


Retail Strategy for the Mid West Region 2010-2016	
Core Shopping Centre Boundary	
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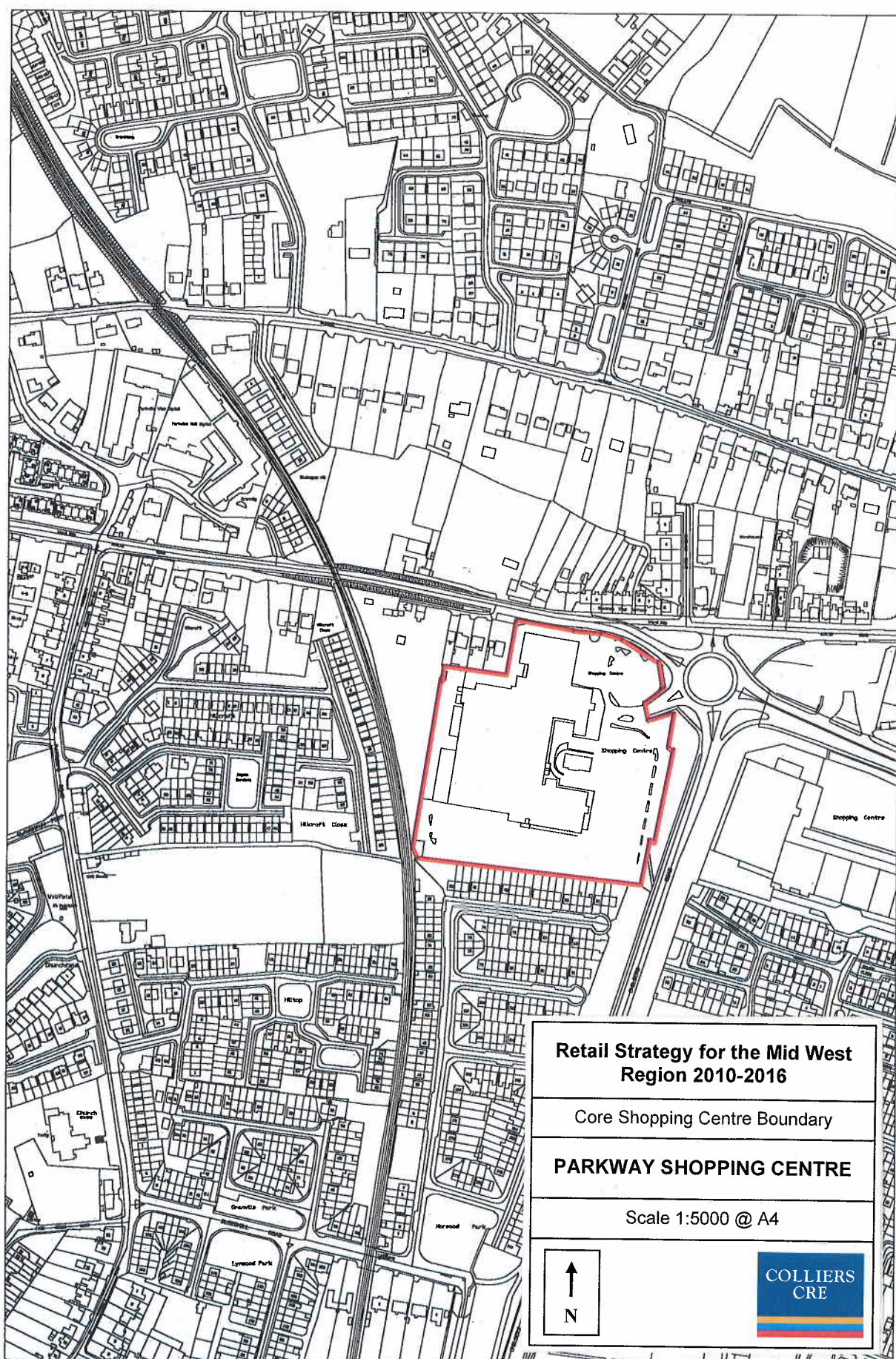
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Region 2010-2016**

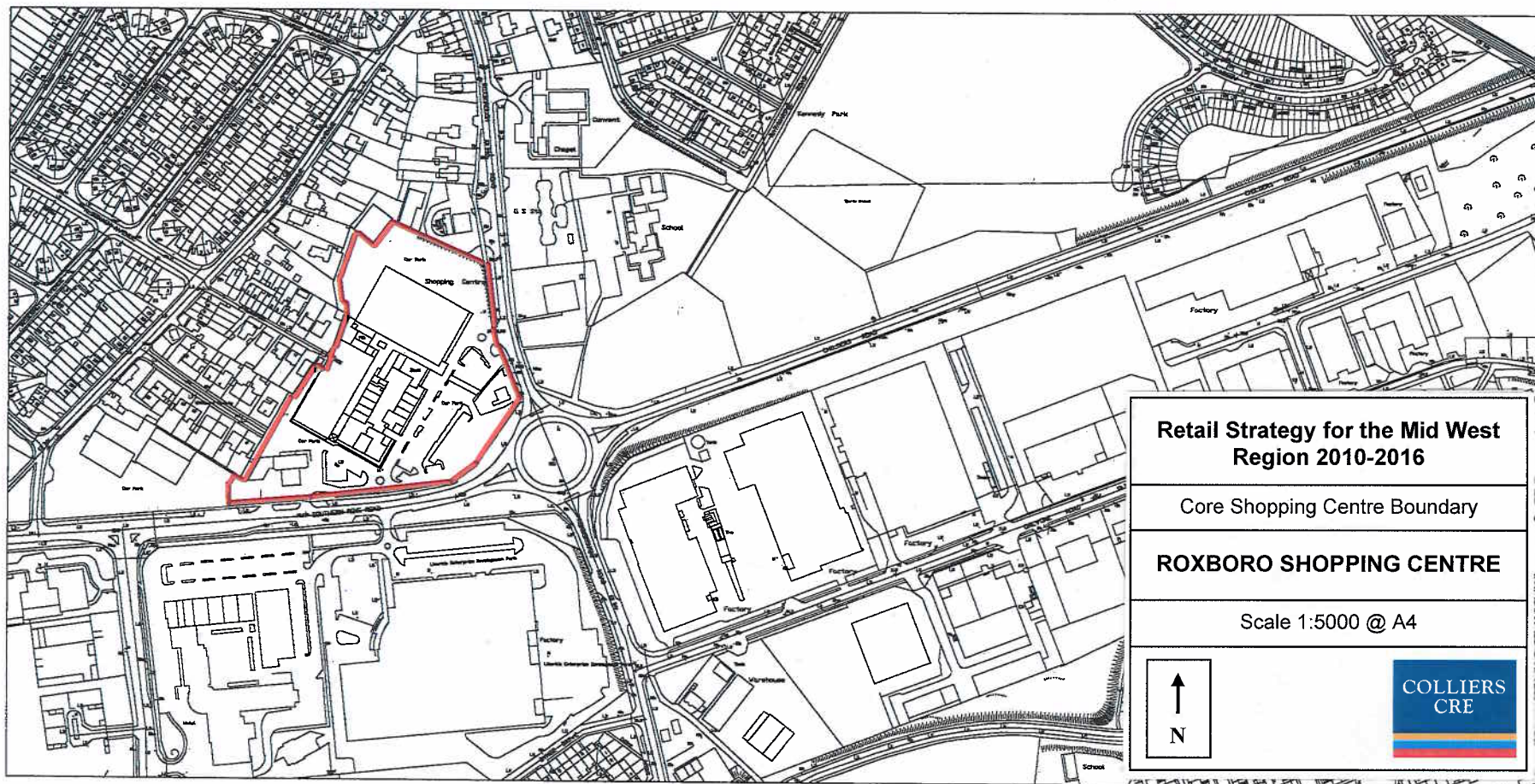
Core Shopping Centre Boundary

CASTLETROY

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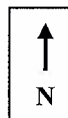


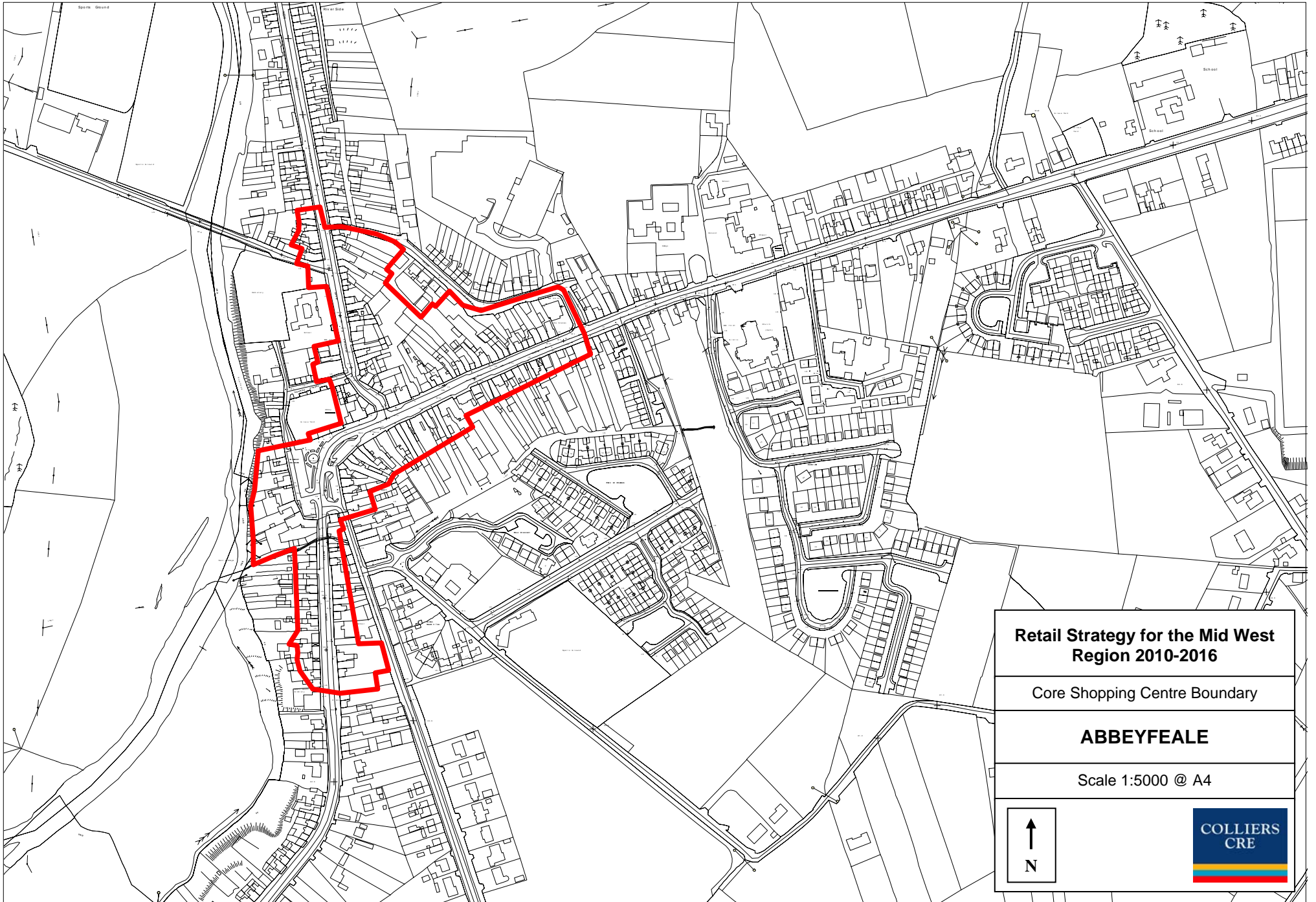
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Region 2010-2016**

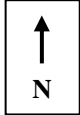

Core Shopping Centre Boundary

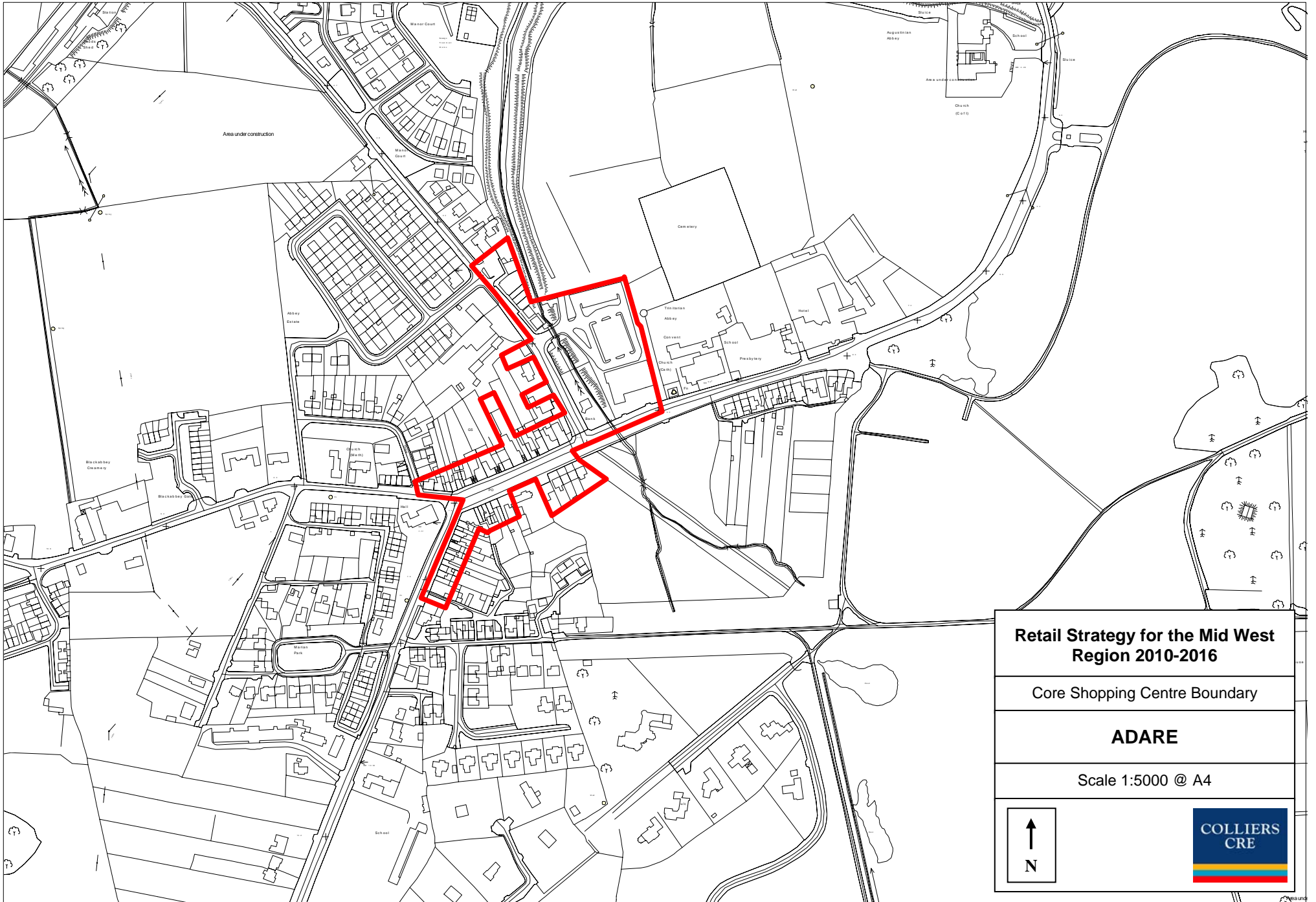
ROXBORO SHOPPING CENTRE



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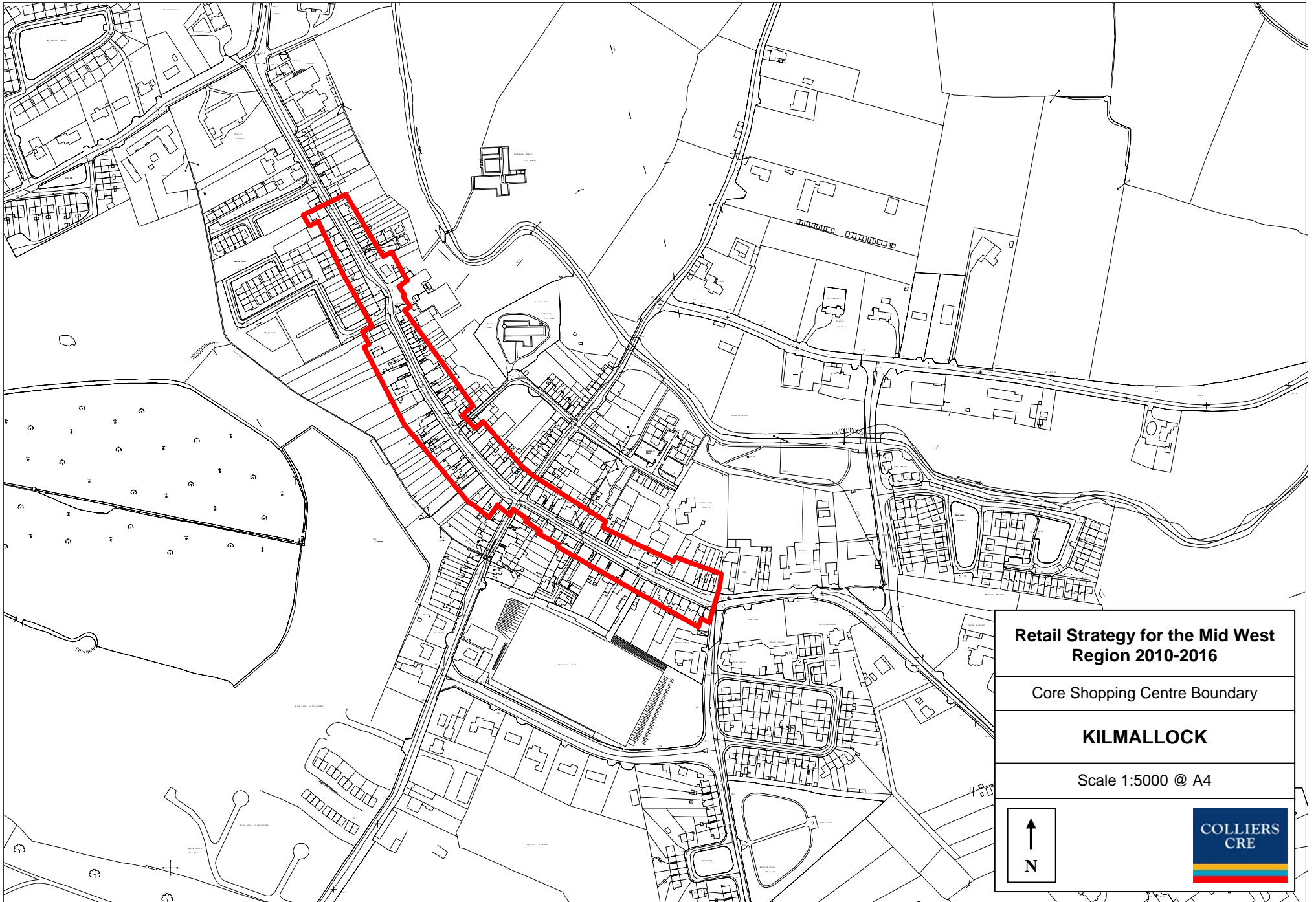




Retail Strategy for the Mid West Region 2010-2016	
Core Shopping Centre Boundary	
ABBEYFEALE	
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Retail Strategy for the Mid West Region 2010-2016	
Core Shopping Centre Boundary	
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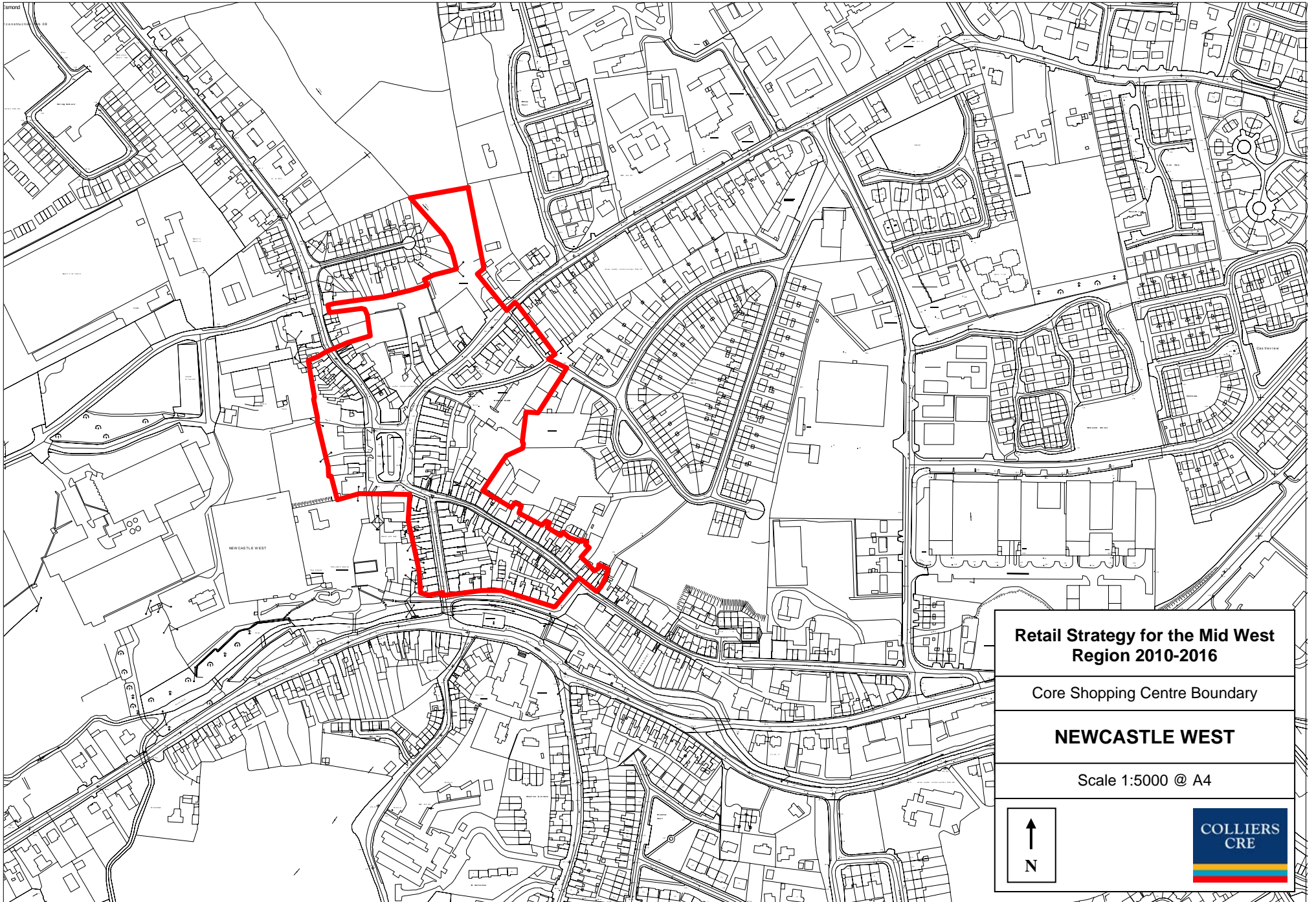
**Retail Strategy for the Mid West
Region 2010-2016**

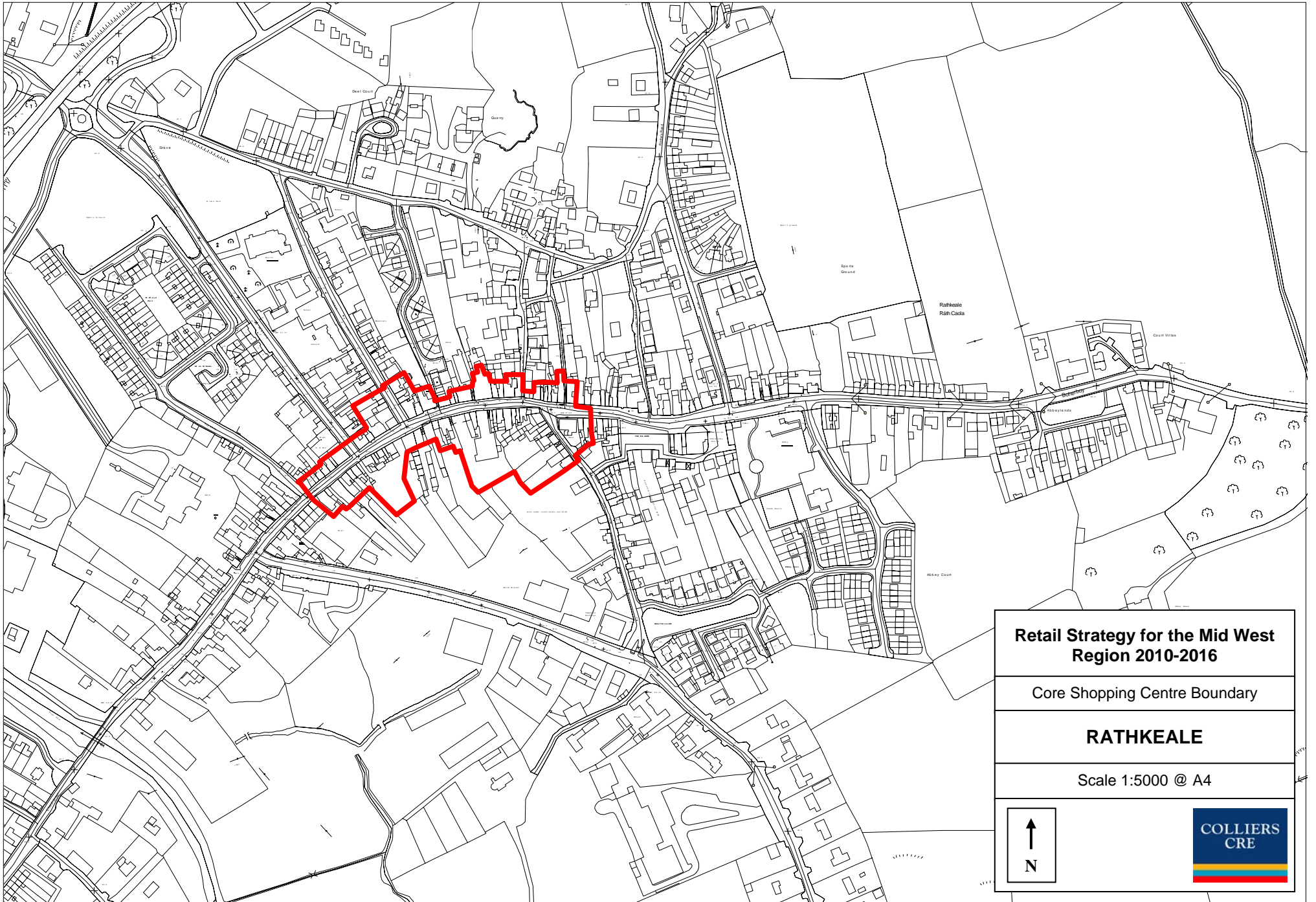
Core Shopping Centre Boundary



KILMALLOCK

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Retail Strategy for the Mid West Region 2010-2016	
Core Shopping Centre Boundary	
RATHKEALE	
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RETAIL STRATEGY FOR THE MID WEST REGION

2010-2016

APPENDICES

Volume 2

APPENDICES (Volume 2)

Appendix 1: Copy of Study Brief (Extract)

Appendix 2: Town Centre Health Check Proformas

Appendix 3: Household Telephone Survey

- (A) Objectives and Methodology
- (B) Sample Breakdown and Statement of Reliability
- (C) Survey Questionnaire
- (D) Key Results
- (E) Summary of Market Share Data by Centre and Zone

Appendix 4: Technical Data

- (A) Population Estimates and Projections
- (B) Resident Consumer Retail Expenditure Per head and Expenditure Growth Forecasts
- (C) Tourist Expenditure on Shopping within the Mid West Region

Appendix 5: Retail Floorspace Data: Floorspace Stock Figures and Turnover Estimates

- (A) Methodology for Estimating Existing Retail Floorspace Stock
- (B) Existing Retail Floorspace and Retail Development Pipeline
- (C) Retail Development Pipeline – Turnover Estimates at 2016 and 2022

Appendix 6: Quantitative Retail Floorspace Need Assessment

- (A) Description of Methodology
- (B) The Need for Additional Non-Bulky Comparison Goods Floorspace
- (C) The Need for Additional Bulky Comparison Goods Floorspace
- (D) The Need for Additional Convenience Goods Floorspace

Appendix 7: Influences On The Update Of The Retail Strategy

Appendix 8: List of Public Submissions Received

RETAIL STRATEGY FOR THE MID WEST REGION 2010-2016

APPENDIX 1

Copy of Study Brief (Extract)

Review of the Mid West Retail Strategy for the Administrative Areas of Limerick City Council, Limerick County Council and Clare County Council and for the Mid West Regional Authority

Review of Mid West Retail Strategy

1.0 Introduction

Limerick City Council as lead Local Authority wishes to advertise for the appointment of consultants to undertake a review of the Mid West Retail Strategy for the Mid West Regional Authority and the administrative areas of Limerick City Council, Limerick County Council and Clare County Council. Tenders are invited from suitably qualified and experienced consultants to undertake this review.

The current Mid-West Retail Strategy that is the subject of this review is for the period 2003 – 2011. The Strategy was prepared in accordance with the requirements of the Retail Planning Guidelines for Planning Authorities (RPG). The review of the retail strategy for the Mid-West Region will be for the period 2008-2016.

Background

The Mid West Region has experienced a significant increase in retail and allied development throughout the region, but more particularly in the greater Limerick City and its immediate hinterland. Significant increases in consumer activity, population growth, investment opportunities in retail development, improved transport and infrastructural links have had a significant effect on retail development throughout the region. This has resulted in the pace and extent of such development far exceeding the planned retail development envisaged for the region in terms of the joint retail strategy adopted by the constituent Planning authorities of the region in February 2003. It is considered essential therefore that the existing strategy should be reviewed as a matter of urgency to identify the existing and future potential for the sustainable development of retail offer in the region, in accordance with changing demographics, spatial development and consumer and investor demands. In addition the strategy is required to incorporate and take cognisance of the requirements of existing and new National and Regional planning and development strategies including the National Retail Planning Guidelines 2000, Mid- West Regional Planning and Economic Development Guidelines 2004, NSS, Limerick - Shannon Gateway designation, and the Hub policies for Ennis Town as they affect the Mid West region and the Mid West Area Strategic Plan (MWASP).

Relevant documentary review

The following documents, including retail studies, retail strategies, Development and Local Area plans are of interest to this study:

Limerick Corporation/Limerick County – Caherdavin, Castletroy, Dooradoyle Retail Study 1983

Brady Shipman and Martin Retail Study 1998

DTZ Mid West Retail Planning Study and Report 2003- 2011

Review of the Mid West Retail Strategy for the Administrative Areas of Limerick City Council, Limerick County Council and Clare County Council and for the Mid West Regional Authority

Limerick City/ Limerick County and Clare County Development and Local Area Plans
Limerick and Clare County Retail Strategies

NSS 2002

Atlantic Corridor reports and publications, including Atlantic Gateway Perspective and Draft Atlantic Gateway Corridor Frameworks

~~John Fitzgerald Report 2007~~

City Centre Strategy

Review of City Centre and Suburban Rents for Limerick City Council

Review Strategy

It is considered important in reviewing the Strategy that a plan-led approach, supported by all the constituent Planning Authorities in the Mid West Region, should identify with, and adopt a common approach to the sustainable development of future retail opportunities in the region. There is a clear need to have clarity (on scale, type and location) in the planning and development of retail opportunities in the region and promote a greater plan led and co-ordinated approach to the future planning and development of retail opportunities in the region.

In order to achieve this objective this study must review past development trends, update the current quantum and range of retail offer in the region, and make recommendations that any new developments are appropriate in scale, location and character so as to promote the sustainable economic development and employment objectives identified in the strategy.

Key Issues for the Review

DTZ Pieda Consulting was appointed in November 2001 to prepare a Mid West Retail Strategy for the period 2001 – 2011. The Strategy was prepared in accordance with the requirements of the Retail Planning Guidelines for Planning Authorities (RPG). For the first time there were national policy guidelines and detailed baseline data to enable the development of a Regional Retail Strategy.

The baseline review and assessment for the strategy was completed in May 2002 and subsequently was reviewed to take into account, where possible, the results of the 2002 Census.

In the Strategy the consultants stated that “The Mid West Retail Strategy has been founded on a sound basis of research, survey analysis and published statistics”. Nonetheless the consultants recommended that a framework for regular monitoring and review should be established and that this framework should include a review of the Strategy after 3 years.

The key output of the current retail strategy is an indicative additional net floor space requirement for the Mid West area and identification of the retail hierarchy within the region.

Review of the Mid West Retail Strategy for the Administrative Areas of Limerick City Council, Limerick County Council and Clare County Council and for the Mid West Regional Authority

Preliminary assessments indicate that:

- Population per the 2006 census is below the consultant's expectation;
- Population per DOEHLG 2011 projections is below the consultant's expectation;
- Expenditure adjusted for inflation is below expectation;
- Turnover per Sq M is more or less in line with expectation.

In addition to the above the study will in particular take into account the following issues in the review of the existing retail strategy, namely:

- Review of the existing retail strategy to prepare jointly, comprehensive retail strategies and policies for Limerick City, Limerick County and Clare County in accordance with "Retail Planning – Guidance for Planning Authorities, 2005" and in particular addressing the matters set out at paragraph 36 (i-vi) of that document. The final document shall be prepared to facilitate the three local authorities incorporating the relevant policies into their respective Development Plans and Local Area Plans.
- Review the existing strategy in the light of new National, Regional and Local Planning Policies and Guidelines as they affect retail development in the region. Particular attention should be given to the development of the retail offer in the designated Limerick / Shannon Gateway area. The role of Ennis as a "hub" and the appropriate retail offer for it in the context of the Strategy should be examined.
- Address sustainability, social inclusion and urban regeneration issues including both "Greenfield and Brownfield" development.
- The functioning of the retail sector in existing main city/ town centres within the region and their functional interrelationship with their hinterland areas should be examined.
- Undertake research into comparative retail strategies of similar size regions / Cities / Towns and evaluate their relevance and potential effectiveness for adoption in relation to the Metropolitan Area.
- Review all relevant retail policies in EU, National, Regional and Local Area Development / Local Area Plans and retail strategies for consistency of application and compliance with Retail Planning guidelines. Make proposals for the common implementation of the adopted strategy.
- The Mid West Area Strategic Plan (MWASP) is presently under tender. It is not expected to commence until September 2008 and will take 18 months to complete although a short interim document is to be prepared within three to four months. The purpose of the plan is to provide a framework for the integration of land use and transport provision for the region into the future with a particular emphasis on

Review of the Mid West Retail Strategy for the Administrative Areas of Limerick City Council, Limerick County Council and Clare County Council and for the Mid West Regional Authority

the Limerick “metropolitan area”. This review should have regard to the interim document.

- In November 2006 John Fitzgerald was requested to lead an initiative aimed at addressing social exclusion, crime and disorder issues in Limerick. His report was submitted to cabinet and approved in March 2007. The Limerick Regeneration Agencies, Southside and Northside were established in June 2007. Both agencies are charged with the task of designing and implementing Master plans for the areas of Moyross on the Northside, St. Mary’s Park in the City Centre and Southhill/Ballinacurra Weston on the Southside. The success of regeneration is dependant on support and goodwill from all Government Departments and local agencies especially Local Authorities. The aims and objectives of Limerick regeneration are 1) deal with the issue of criminality, 2) Economic and infrastructural regeneration to create employment, unlock value, improve access and create better commercial and housing mix, 3) develop coordinated responses to social and educational problems in order to break the cycle of disadvantage. The Agencies are currently preparing Master plans for each area. The review shall have regard to the master plans and make recommendations to ensure that the master plans are aligned with regional and local retail strategies.
- Review any significant developments in retail / market trends since 2001 (including inter alia, growth of discount stores, retail warehousing including non-capped large-scale retail, home delivery, internet purchasing)

Key Outputs of the Review

- Verify and update the existing DTZ retail survey information of 2003 for the region. The current retail floor space (split into trading and extant permissions as at 1 July 2008) should be quantified into (i) high order comparison, (ii) middle order comparison, (iii) low order comparison, (iv) bulky comparison and retail warehousing and (v) convenience. Each of (i) to (v) should then be quantified by area in accordance with the current Mid West Retail Hierarchy as set out in table 5.1, page 50, of the current Strategy. The current retail floor space should also be compared by category and area to the floor space in 2003.
- Quantify the retail floor space which should be provided to meet future demands in the period to 2016 into the following categories (i) high order comparison, (ii) middle order comparison, (iii) low order comparison, (iv) bulky comparison and retail warehousing and (v) convenience, using such local data (or proxy therefore) as will satisfy the criteria laid down in the Ministerial Guidelines. Each of (i) to (v) should then be quantified by area in accordance with the current Mid West Retail Hierarchy as set out in table 5.1, page 50, of the current Strategy.
- Review the performance of the retail hierarchy in the Mid West Region and in particular examine the spatial distribution of new retail development in the period

Review of the Mid West Retail Strategy for the Administrative Areas of Limerick City Council, Limerick County Council and Clare County Council and for the Mid West Regional Authority

- Provide an assessment of how the Mid West Regional Retail Strategy 2003-2011 has met its aims and if it has not met its aims make recommendations on how the aims could be achieved in the period 2008 to 2016.
- Assess if the necessary mechanisms for achieving the right balance between meeting needs and sustaining vital town centers are in place and if they are effective. Where appropriate make recommendations for new mechanisms.
- Assess if a policy is required to regulate the location of particular retailers / retail type (e.g. large department store) in accordance with the retail hierarchy. Make recommendations if appropriate.
- Provide clear and unambiguous guidance and context so that each Planning Authority can make consistent decisions on retail applications and also so that the retail sector and developers can prepare proposals with a degree of certainty as to the way in which any particular scheme will be judged.

RETAIL STRATEGY FOR THE MID WEST REGION 2010-2016

APPENDIX 2

Town Centre Health Check Proformas

Mid West Retail Strategy

Technical Appendix 2

Town Centre Assessments

This section provides the health check assessments of the main centres in Limerick City, County Limerick and County Clare. This information will be used in addition to that derived from the household surveys in the development of the Regional Retail Strategy. For ease of reference, Limerick is dealt with as a single metropolitan area.

Limerick Metropolitan Area

1. Limerick City Centre

Limerick is the third largest city in the Republic of Ireland and the capital of the Mid-West. It is situated on the River Shannon with the commercial heart being situated on the south eastern bank. There are at present three crossing points across the Shannon with a fourth soon to be added with the completion of the southern bypass.

The city centre is constructed on a grid basis with the main shopping provision being focused along O'Connell Street, Cruises Street and the recently pedestrianised Bedford Row linking to the new Dunnes store on Henry Street.

Retail provision in the centre is predominantly comparison goods with the centre containing more individual shops than any other centre in the Mid-West region. Many anchor traders comprise: Brown Thomas Department Store, Debenhams Department Store, Penny's and Dunnes. Convenience retailing is anchored by both the Dunnes store and a Tesco supermarket in the Arthur's Quay Shopping Centre. Compared to other provincial cities it has a sub-standard retail offer.

Limerick is a traditional city centre with a preponderance of small units unsuited to the floor space requirements of modern retailing. The redevelopment along Bedford Row/Henry Street has gone some way towards providing new accommodation. There is planning permission for the redevelopment of an area of historic Georgian buildings to the north of the shopping centre. This scheme known as the Opera Centre would comprise some 25,000 sq m of retail and restaurant space. Revised proposals are now before Pleanála, which seeks to preserve at least the facades of the Georgian buildings.

Concept proposals have also been produced for the area between Patrick / Rutland Street and the River, including the Arthur's Quay Shopping Centre and Arthur's Quay Park for a two level shopping centre of some 57,000 sq m.

further proposals for the development of new shopping at the north end of the city centre around Charlotte's Quay. At present, however, the centre struggles to provide the quality and size of accommodation provided at some of the suburban shopping centres.

The city is at the heart of an extensive public transport network encompassing both rail and bus. It is linked by rail to Ennis in the northwest and Nenagh in the northeast and to Dublin and Cork in the east. The western rail corridor extending services from Ennis to Galway and Sligo, will be reopened during 2009.

Limerick City Centre – Diversity of Uses	
Use	Description
Banks/Building Societies	Irish National, ACC (x2), Permanent TSB, Irish National BS, Bank of Scotland, Ulster Bank, St Bernadette's Credit Union, AIB, St John's Credit Union, First Active.
Post Offices	There are two Post Offices situated in the City Centre.
Hotels	The Royal George Hotel, Sarsfield Bridge Hotel, Marriott.
Restaurants	Hong Kong Chinese, Luigi Malone's, Wok King, Azur, Francos, Danny's Café, Kebabish, Mojo, Sails Café, Burger King, The Old Quarter, Z-We-ton Chinese, O'Connell Grill, MacDonalds, Chicken Hut, Rockets, Texas Steak Out, Abrekebabra, Subway, Supermacs, Café on the Row, Taste of Europe sandwiches, Papa Ginos Pizza t/a, BB's Coffee and Muffins, Subway, O'Brien's Sandwiches, Greene's Café, nzo's Café, LOL Internet Café, Kranks, O'Connor's, Bean and Baker café, The Delish Café, Bagel Factory, Bella Italiaa, Sage Café, French's Coffee Shop, Henry's Café, Pier One, Milano, Hampton's restaurant, Jaffa's Café, Foley's, Clohessey's, QQ Internet Café, Red Rose Café, Treacey's Bar, Luigi's fish and Chip Shop, Tait's Clock, Corner Café.
Bars	The Club House, Vintage Club, Molly Malones, Flannerys, P A Martin, Charlie Chaplins, The Still House, Au Bars, O'Riordan's PH, Riddler's, Squire Maguire PH, Patsy Nicholas, Mark Murphy PH, Jerry Flannerys, Charlie St George PH, The Precinct Bar, Costello's, Brazen Head, Daffy's Bar, Tom Collin's PH, The Bank PH, TC's Bar, O'Brien's PH, Tom's Bar, O'Donnell's, Gerry Power, Magners.
Cinemas	None.
Theatres	The Beltable Arts Centre is situated on O'Connell Street
Residential	Ground floor uses in the city centre are almost wholly in commercial use.

There are a relatively high number of vacancies in the centre (although proportionally much smaller) however a large number of these are concentrated in either proposed or existing redevelopment sites. The Charlotte's Quay scheme at the north end of the centre is a proposed redevelopment for new retail accommodation and the site is being assembled.

Some 25 vacant units are accommodated in this area (about 40% of the total). The development of the new Dunnes store also led to that retailer vacating Sarsfield Street/ Libby Street. The small mall associated with that store is now also largely vacant, and in total a further five vacancies are concentrated in this location.

There is also a refurbishment of a vacant period building at the southern end of O'Connell Street which has created seven units, four of which remain vacant. Forty four of the 83 vacancies, some 41%, are focused in these three locations.

Representation	No.	%
Comparison	227	57
Convenience	45	11
Service	48	12
Vacancies	83	20
Retail Warehousing	0	0
Total	398	100

2. Dooradoyle

Dooradoyle, a Tier 2 retail centre also known as the Crescent Shopping Centre, lies within the Limerick Metropolitan Area but falls within Limerick County Council's Administrative Area. The County Council offices are immediately adjacent to the shopping centre.

This scheme comprises a modern, purpose-built enclosed shopping mall which has been extended on two occasions. Proposals for a third extension to accommodate a large M & S store are currently being considered by An Bord Pleanála. It would be extremely accessible from the Limerick southern bypass once it is completed.

The scheme provides a mix of food and non-food retailing with a number of major anchor stores. These include:

Penny's Department Store

Shaw's Department Store

Heaton's Department Store

Tesco Supermarket (with separate large unit for Tesco Home and Ware)

The scheme is essentially comparison goods based accommodating a large range of high order high street names, many being international multiple retailers. Whilst all unit shops are relatively large units, the size of the units provided in the more recent extensions are

significantly larger than provided in the first phase of the present scheme, or that can be found in Limerick city centre.

The scheme has a significant fashion focus accommodating traders such as Next, Zara, H & M, Monsoon and River Island. There are also types of comparison goods provision provided through Argos, Boots and smaller scale toy, books and stationery retailers. In addition there is a small range of catering outlets predominantly serving to the shopping public. There are few other services in the centre, predominantly banks, although the local library is situated just outside the scheme.

The development is supported by over 1,000 car parking spaces and an Omniplex cinema is also included on the site.

This scheme provides significant competition with traders in Limerick city centre as it performs the same role and function.

An Bord Pleanála determined two related appeals for the extension of the Crescent Shopping Centre on the 27 July 2009 comprising:-

- (i) a new retail store (10,338 sq m gross, 6,379 sq m net) linked to the existing centre by a landscaped street (restricted vehicular access) flanked by nine mixed use units (1,733 sq m gross approx) comprising four shops, two restaurants, one bank and two office/medical units, together with alterations and additions to the car parking arrangements (resulting in an additional 530 spaces);
- (ii) associated alterations to the local highway infrastructure.

The proposed new retail floorspace was dismissed on the basis it would create a regional shopping destination in a suburban location within 3 kilometres of the City Centre to the detriment of the vitality and viability of the City Centre, contrary to the provisions of the 'Retail Planning Guidelines for Planning Authorities'.

The proposed highway works were similarly dismissed on the basis the evidence submitted was insufficient to demonstrate that the proposed extension would not result in increased, serious traffic congestion on the local highway network, and would thereby be contrary to the proper planning and sustainable development of the area.

3. Castletroy Shopping Centre

Castletroy shopping centre is a purpose built single storey shopping centre based around a Superquinn's supermarket. It is situated on the south side of the Dublin Road towards the north eastern edge of the urban area. Access into to site is from Monaleen Road which is shared with Storm Cinema multiplex and MacDonalds Drive Thru restaurant, both of which form part of the District centre designation. The site has ample surface level car parking.

Castletroy Shopping Centre - Diversity of Uses	
Use	Description
Banks/Building Societies	None
Post Offices	None
Hotels	None
Restaurants	Ruby's Cafeteria, BB Coffee and Muffins, MacDonalds Drive Thru
Bars	None
Cinemas	Storm Multiplex Cinema
Theatres	None
Offices	None
Residential	None

Whilst there is a good range of small comparison goods outlets, these are occupied by mainly low order independent retailers. The supermarket is the main retail attraction of the scheme, which overall is starting to appear tired and in need of investment. There are a relatively large proportion of vacancies reflecting this position.

Planning permission has recently been granted for the extension of the centre into the undeveloped land to the east. The permission is for a total of 2219 sq m of convenience space, 4002 sq m of Retail warehousing (comprising one unit of 1364 sq m and two units of 1319 sq m, and a two storey office/library building of 3007 sq m). An additional 352 car parking spaces would be provided together with a new main roundabout access off the Dublin Road.

Proportion of Retail Representation in Castletroy Shopping Centre		
Representation	Total	
	No.	%
Comparison	14	58
Convenience	1	4
Service	0	0

Vacancies	9	38
Retail Warehousing	0	0
Total	24	100

On the north side of the Dublin Road, outside of the district centre allocation is a new parade of local shop units and a stand alone Lidl discount supermarket. These in the main do not function as part of the Castletroy centre as they are divorced from it by the busy highway but do provide additional local shopping services. It is however likely that shoppers visiting the Superquinn supermarket will also visit the Lidl store as part of the same shopping trip, albeit driving from one site to the other.

4. Parkway Shopping Centre

Parkway Shopping Centre is a purpose-built covered shopping mall situated to the northeast of Limerick city centre, at the junction of Childers Road with the Dublin Road (R445). It has good accessibility being one of the main radial routes out of the city centre and on, what will be after the completion of the southern bypass, the inner ring road.

The development comprises a 'U' shape internal mall anchored by a Dunnes store (selling food and non-food goods) albeit with some external facing outlets, including a more recently constructed Burger King Drive Through Restaurant. The scheme is looking a little dated and tired with a relatively high vacancy rate, although the majority of vacant units are relatively small.

Parkway Shopping Centre - Diversity of Uses	
Use	Description
Banks/Building Societies	Bank of Ireland, EBS
Post Offices	None
Hotels	None
Restaurants	Planter's Café, Esquires Coffee, Goodfella's Pizza t/a, Burger King Drive - Thru
Bars	The Park PH
Cinemas	None
Theatres	None
Offices	None
Residential	None

The Dunnes store is not only the anchor store, but comprises the largest volume of floor space in the scheme. The centre provides mainly for local day-to-day needs with only a limited comparison shopping function. The externally facing units appear to focus on

providing services that are required late at night (eg public house and fast food) although the ATMs associated with the Bank of Ireland unit are situated in the mall lobby, again presumably to afford out of hours access.

The Dunnes store operates as a main food shopping destination and so is likely to continue to successfully anchor the scheme.

Opposite Parkway Valley is the Park Point development which comprises three large scale retail units, two of which are occupied by Aldi and The World of Wonder toy store. The third remains vacant.

Proportion of Retail Representation in Parkway Shopping Centre		
Representation	Total	
	No.	%
Comparison	18	51
Convenience	3	9
Service	4	11
Vacancies	10	29
Retail Warehousing	0	0
Total	35	100

Directly opposite the Parkway Shopping Centre, on the other side of Childers Road, lies the Parkway Retail Park.

5. Caherdavin

Caherdavin, also known as Jetlands Shopping Centre, is a modern, purpose-built shopping centre anchored by a large Dunnes store, situated some two miles to the west of Limerick city centre on the Ennis Road. It occupies a suburban location within the Limerick Metropolitan Area with good accessibility. There is ample free car parking provided at ground and first floor level with the shopping centre being situated on the first floor. There is travelator and lift access from ground level.

Internally the shopping centre provides a spacious environment with the Dunnes store occupying one side of the mall, and the unit shops the other, together with the short malls leading in from the first floor parking area.

The Dunnes store operates as a main food shopping destination and also provides an extensive range of comparison goods. Its offer is augmented by a small range of comparison traders together with several local service traders. The success of the scheme is dependent

upon the Dunnes store and over the course of our inspections we noted that two comparison goods traders ceased trading.

Jetland Shopping Centre - Diversity of Uses	
Use	Description
Banks/Building Societies	None
Post Offices	None
Hotels	None
Restaurants	MacDonalds Drive – Thru, BB Coffee and Muffins, Costa Coffee
Bars	None
Cinemas	None
Theatres	None
Offices	None
Residential	None

The traders in the mall are supported by an external drive through McDonalds Restaurant situated on the first floor level of the car park. Whilst the table below indicates there is no retail warehousing within the scheme, which in terms of the centre's planning designation is correct, the Ennis Road Retail Park shares the access spur from Ennis Road.

Proportion of Retail Representation in Jetlands Shopping Centre		
Representation	Total	
	No.	%
Comparison	9	53
Convenience	1	6
Service	1	6
Vacancies	6	35
Retail Warehousing	0	0
Total	17	100

These retail facilities are supported by independent retailing developing on the north side of Ennis Road. This comprises a Lidl discount food store, together with a children's soft play area and Super Max Family Restaurant.

6. Roxboro Shopping Centre

The Roxborough Shopping Centre comprises a Tesco supermarket with an externally facing parade of shops and an internal mall. It is situated to the southeast of Limerick city centre on the inner ring road. It is a purpose-built, primarily single storey scheme which now appears to be somewhat dated. The scheme shares its access with a Topaz petrol filling station.

The Tesco supermarket is the key anchor trader and is capable of providing a main food shopping function, however it appears to be used for a mix of main and top up shopping

purposes. The store has an extensive range of food products and also sells limited ranges of clothing, electrical and kitchen ware.

Roxboro Shopping Centre - Diversity of Uses	
Use	Description
Banks/Building Societies	Bank of Ireland
Post Offices	One
Hotels	None
Restaurants	Chinese Palace, The Good Cafe
Bars	Steering Wheel Bar
Cinemas	None
Theatres	None
Offices	None
Residential	None

The scheme functions as a convenience based local shopping centre, the Tesco being supported by an independent butcher and baker. The comparison shopping function is very limited although the scheme does provide a range of services, including a library. The internal arcade is, however, exhibiting a high level of vacancies (six units), which were fully occupied as shops, restaurant and doctors' surgery. This scheme is in need of upgrading and refurbishment to maintain its competitive attraction.

Proportion of Retail Representation in Roxboro Shopping Centre		
Representation	Total	
	No.	%
Comparison	3	18
Convenience	3	18
Service	5	29
Vacancies	6	35
Retail Warehousing	0	0
Total	17	100

Directly opposite the development is a new scheme encompassing an Aldi, a parade of local shops and the 'Maldron' Hotel.

7. Parkway Valley

The site of Parkway Valley Retail Centre is situated to the east of the Parkway Shopping Centre, just beyond the Parkway Retail Park. This scheme is accessed from the Dublin Road and comprises a large new enclosed shopping mall currently under construction. At the time of our inspection however construction activity had ceased and we understand that the site has effectively been mothballed awaiting the economic climate.

8. Coonagh Cross

Coonagh Cross comprises a large Tesco Superstore adjacent to a vacant and boarded up retail mall of 7,400 sq m retail space. The Tesco store is currently supported by a very large car park.

A large part of the site is hoarded off but has been developed to provide retail warehousing. The units are largely constructed and the car parking surfaced but it appears that the site has been moth-balled in the current economic climate.

9. Limerick Out of Centre

Outside of Limerick town centre, in addition to the suburban retail shopping centres and the local centres, there are a number of established retail parks. These include:

i) Childers Road Retail Park

This development comprises a very extensive modern retail warehouse scheme providing 12 retail units next to a variety of retailers, many of which sell small comparison goods. The retailer line up comprises:

Arcadia Clothing
Argos Extra
JJB Sports (with fitness club)
Next
Harry Corry Interiors
Lifestyle Sports
Maplin Electronics
Dunnes Stores
Heatons (including Sports World at mezzanine level)
Smiths Toys
Land of Leather
Atlantic Homecare DIY

There are in addition to A3 restaurants occupying part units within the car park occupied by KFC and Pizza Hut.

This retail park is the best scheme in the Mid-West region, is attractively designed, finished to a good standard and let to a good range of tenants. It will compete directly with the City Centre.

The Dunnes store sells both food and non-food goods and acts as a main food shopping destination.

ii) Parkway Retail Park

This scheme is situated opposite the Parkway shopping Centre and comprises an out of centre bulky goods retail park, again with good road accessibility. It is well situated to operate as a linked shopping destination with the Parkway Shopping Centre, and indeed the Childers Road Retail Park just to the south. The retail park was fully let, the tenants comprising:

- Homebase
- Currys
- Carpet Right
- Elvery's
- Home Focus at Hickies
- PC World
- Reed Furniture
- T X Maxx

A single vacant restaurant unit within the car park area. Clancy's Electrical Superstore is situated on the north side of the Dublin Road, forming part of neither the Parkway shopping nor retail park, but again is well situated to form part of a linked trip.

iii) Eastway Retail Park

On the south side of the R527, a major arterial route leading out of Limerick to the east there is situated the City East Retail Park. This development is predominantly bulky goods being occupied by:-

- B & Q
- In-Store Furnishings
- Halfords
- Maxi Zoo
- Harvey Norman
- Home Store Plus
- Moore
- Vacant (former Toy Master)

This is another good quality retail park which is again highly accessible by road. It is, however, situated within a predominantly industrial area with little nearby residential development.

A vacant site adjacent to the B & Q is being advertised for sale for development for circa 74,000 sq ft of retail floor space.

There is a large stand alone Wickes retail unit close by which could be accessed as part of a linked trip.

(iv) Ennis Road Retail Park

This scheme comprises a modern retail park situated adjacent to the Jetlands Shopping Centre, sharing its access road. It is anchored by a Woody's DIY unit which is supported by Pet Mania and Smyths Toys. Whilst this scheme appears to be modern there are currently four vacant units.

v) Delta Retail Park

This scheme is situated on the Ballysimon Road, the old main route out of Limerick to the east, which has effectively been replaced by the R527. It occupies a back land site and is occupied by a range of predominantly bulky traders comprising:

The Party Store (including Fine Wines)
The McCarthy's The Homemakers
Room by Room
Sound Store Electrical Superstore
Elm Fireplaces Marble and Granite
Right Price Tiles

There are currently three vacant units and this scheme does not appear to be trading well.

vi) East Way Industrial Area

Throughout the East Way Industrial Area there are, in addition to the retail parks identified, a range of quasi retail outlets supplying both trade and members of the public. These, in the main, tend to be focused on 'home making'.

vii) Riverside Park

Situated on the M69 road leading out of Limerick to the southwest, Riverside Park comprises a modern retail development which is still struggling to become established. There is a row of five vacant units in one terrace, with a further terrace occupied by bulky goods traders comprising:-

Arramount Furniture
Tile Warehouse
The Carpet Store
The Drawer and Dresser Furniture
Sliderobes
Cycling Pursuits

Just beyond this development is a new stand alone quasi retail unit 'Supa Floors' selling carpets and bedroom furniture.

There are other quasi retail uses situated throughout the Dock Road Industrial Area and planning permission has been granted for a site opposite Court Back Avenue which is being advertised as including 8,000 sq ft of retail space.

LIMERICK COUNTY COUNCIL

1. Newcastlewest

Newcastlewest is, after Limerick city, the largest town in Limerick county. It is an attractive, historic, town situated on the River Arra, which flows into the River Deel, and also just off the N21 road from Limerick to Tralee, between Rathkeale and Abbeyfeale, about 29 miles to the south west of Limerick city. This location affords the town good accessibility, but without the problems associated with through traffic passing through the shopping area, and affords the town a large catchment area which is reflected in its size and prosperity.

Newcastlewest – Diversity of Uses	
Use	Description
Banks/Building Societies	Permanent T.S.B, Bank of Ireland, A.I.B, Irish Nationwide Building Society, Credit Union, Ulster Bank, Newcastle West Building Society
Post Offices	1
Hotels	Courtney Lodge Hotel
Restaurants	Phoenix Restaurant, The Mallard, Marguerites Restaurant, Crumbs Café, Hokee Chinese Restaurant, Super Bites, Ranch House Kebabs, Mamma Mia Pizza, Subway, Golden Pond Chinese t/a, Bridge House Wines, New Turban Indian Restaurant, Hot Shots and Pannier Reataurant, Clicks Café, Regazzi Italian Restaurant.
Bars	The Greyhound Bar, Pub, The Knight's Inn, Ed Lynch's Bar, Barry's Pub, Darby's Bar, Fitzgerald's Corner House Bar, Pat's Bar, Arthur O'Connor's Bar, Whelan Bar, Detori's Sports Bar, Cartlioges Bar, Goodfellows Bar
Cinemas	Lee's Cinema
Theatres	None
Offices	McCarthy Insurance, O'Donovan & Associates Auctioneer, Newcastle West Business Park, Skaleen Auctioneers, Skalon Financial Consultant, Herlihy Flavin Estate Agent, Paul Buckley Travel Agent, Falcon Travel Agent, O'Donovan Estate Agent, Weekly Observer Newspaper Office, Charles O'Brien Estate Agent, Collins and Co Estate Agent.
Residential	The town centre is predominantly in commercial use with residential properties surrounding.

The town benefits from a very well established and extensive range of comparison shops, second only to Limerick and comparable with Ennis in terms of number and variety. The town also supports two relatively large Supervalu stores albeit with limited adjacent parking. There is in addition a large modern Tesco store situated out of centre directly off of the N21 road. Both the convenience and comparison provision provide both middle and lower order ranges.

The centre also benefits from extensive service sector encompassing personal services such as hair dressing, dry cleaners, travel agents and an extensive commercial sector. There is also a good range of restaurants and bars including two clubs, which give the town a prosperous appearance.

There are a number of vacancies in the centre, a number of these associated with a redevelopment on Bishop's Street which will enhance retail provision. Whilst the number of vacancies is relatively high, they are spread throughout the centre and in the main comprise small units. There is however a concentration along Maiden Street and its junction with Bridge Street, which could detract from the retail attractiveness of this area if they persist in the long term.

Proportion of Retail Representation in Newcastlewest		
Representation	Total	
	No.	%
Comparison	59	58
Convenience	10	10
Service	13	13
Vacancies	19	19
Retail Warehousing	0	0
Total	101	100

2. Abbeyfeale

Abbeyfeale is an historical market town situated on the banks of the River Feale in the foothills of the Mullaghareirk Mountains near the boundary with County Kerry. The town is some 38 miles south west of Limerick between Newcastle West and Tralee on the N21 - the main road from Limerick to Tralee.

It is a large centre providing an extensive range of comparison and convenience shopping. The convenience offer is anchored by the new Tesco supermarket which provides a full range of convenience goods together with a limited offer of comparison goods. There are two other convenience stores and a range of specialist food and drink outlets. There is no single large comparison goods anchor but provision is through a wide range of small unit shops. Most goods types are available but the depth of the offer is limited.

The centre also accommodates a wide range of services including hairdressers, beauty parlors, dry cleaners, and betting shops. Professional and health services are also available and there is a library.

Abbeyfeale – Diversity of Uses	
Use	Description
Banks/Building Societies	E.B.S. Allied Irish Bank, Bank of Ireland, Abbeyfeale Credit Union, Permanent TSB (agency)
Post Offices	1
Hotels	Leens Hotel
Restaurants	Little Nero's restaurant. O'Flynn's restaurant and Superman's Restaurant Delhi Kebab, Anne's Diner, Superbites, Ming's Chinese restaurant, O'Sullivan's, Balti House, Bailey Fish & Chips, Valley Land Chinese
Bars	The Ploughman Bar, The Cellar Pub, Lyon's Bar, O'Rourke's Bar, Harnett Bar, Matt McCoy's Bar, Robby's Bar, Jack's Bar, O'Riordain's Bar, Abbey Bar, O'Connor's Bar, Cryle View,, Murphy's Bar and Lounge, Jack O'Rourke's Bar, Fitzpatrick Bar
Cinemas	None
Theatres	None
Offices	Stack & Co Auctioneer, Dennison Solicitors, JC Daley Insurance, Stephen Daley Solicitor, Keneally & Murphy Architects, ENG Estate Agent, Wolfe Murphy Estate Agent, W Limerick Development Project, Meridan & Co Tax Consultants, Gerry Flint & Co Estate Agent, FDC Accountants
Residential	Residential development surrounds the town.

The town has a pleasant atmosphere, especially around Market Square. Apart from the Tesco Store, there are no signs of recent commercial development. There are current proposals for a redevelopment of the Abbey Tiles site for a mixed storage/office/health care/retail (two units) development; and another for the redevelopment of a vacant bar to provide ground floor retail with residential over.

Retail units in the centre are primarily devoted to the sale of comparison goods. Whilst there is quite a high proportion of vacancies, these are spread throughout the centre and there is no sign of structural decline in the function of any part. The small cinema at the eastern end of the centre appears to have been vacant for some time.

Proportion of Retail Representation in Abbeyfeale		
Representation	Total	
	No.	%
Comparison	33	40
Convenience	15	17
Services	22	27
Vacancies	13	16
Retail Warehousing	0	0
Total	83	100

3. Adare

Adare is renowned as one of Ireland's prettiest villages and is designated as a Heritage Town. It is located on the National Primary Route N21 which runs through the village to Tralee. It is situated just beyond the junction with the National Primary Route N20 to Cork, about 11 miles to the southwest of Limerick City, and was historically a crossing point on the river Maguire. Adare is a major tourist destination attracting many organised tours which are served by the Heritage Centre and the extensive adjacent parking. Adare is also a popular wedding and conference venue and is becoming a major golf destination. It is also home to a number of world-renowned stables.

Diversity of Uses	
Use	Description
Banks/Building Societies	A.I.B., Credit Union
Post Offices	1 on main street
Hotels	There are a number of hotels on the environs of Adare, these include Adare Manor Hotel, Dunraven Arms Hotel and Woodlands House Hotel
Restaurants	The Good Room Cafe, The Wild Geese Restaurant, The White Sage Restaurant, Arches Restaurant, The Golden Dragon, The Blue Door Restaurant, Bia Bistro, Heritage Centre Cafe
Bars	Collins Bar, Bill Chawke's Lounge Bar, Sean Collins Bar, Pink Potato Aunty Lena's Bar, Village Inn
Cinemas	None
Theatres	None
Offices	Tourist Office (seasonal), Kasey & Co Solicitors, John Gillimane Estate Agents
Residential	Residential developments surround the compact village centre. New developments have taken place on the Kildimo/Station Road

The commercial centre extends along Main Street, incorporating the eastern side of Rathbeale Road at its western end. Commercial activity has been dragged eastwards to service visitors to the historic priory buildings. A recent development on Kildimo/Station

Road has created an extensive new commercial area, currently accommodating a second large convenience stores. Whilst all the vacancies in the centre are on this road, there is a current application to convert two of them to a medical centre.

Comparison retailing in Adare provides high quality offer which is primarily targeted at visitors. Convenience retailing is anchored by two good quality, large convenience stores. There is also a small range of service outlets aimed at the local market, and a surprisingly large choice of restaurants, again mainly targeting visitors.

Proportion of Retail Representation in Adare		
Representation	Total	
	No.	%
Comparison	21	58
Convenience	4	10
Service	6	16
Vacancies	6	16
Retail Warehousing	0	0
Total	37	100

4. Rathkeale

Rathkeale straddles the River Deel and is situated between Adare and Newcastle West some 18 miles southwest of Limerick city on the N21 road to Tralee. Rathkeale is a local service centre providing shopping and professional services, a Museum and a Community College. The town has a large Roman Catholic parish church, Augustinian Abbey ruins and the Holy Trinity Church of Ireland church. There is a Golden Vale livestock mart situated just outside the town. Rathkeale has a significant Irish Traveler community accounting for about 40% of the usually resident population.

Rathkeale – Diversity of Uses	
Use	Description
Banks/Building Societies	A.I.B, Bank of Ireland, Rathkeale and District Credit Union
Post Offices	1
Hotels	Mahons Hotel
Restaurants	Mandarin Palace takeaway, Humours Café, Superbites, Ming's Chinese takeaway, un-named cafe
Bars	Roche Bar, Black lion Inn, Fitzgibbon Bar, Amber Lantern, Molly's Lounge Bar, O'Suilleabhain Bar

Cinemas	None
Theatres	None
Offices	McCormack & Co Accountants, R Woulfe Accountant, Casey & Cox Solicitors, GVM Estate Agents, M O'Donnell Solicitors
Residential	New town houses have been completed in the town centre. More established estates are on the environs of the town.

The retail centre is situated to the north of the river. It fronts both sides of Main Street the old Main Road to Limerick, but with a few units situated on roads off the main route (i.e. Thomas Street and Bank Place). It offers a limited range of both comparison and convenience goods but provides a sufficient range of retailing services and bars/restaurants to meet day to day needs. The town's anchor trader is the large Eurospar supermarket.

Rathkeale also accommodates a number of community uses including a community centre, veterinary surgery, sports injury clinic and Garda Station. Outside the town centre fronting New Line Road a small retail warehouse has opened selling carpets, furniture and bedding. The retail centre has a high level of vacancies concentrated at the eastern end of Main Street. Four of the vacancies appear to form a residential refurbishment scheme but there is no active work at present.

Proportion of Retail Representation in Rathkeale		
Representation	Total	
	No.	%
Comparison	9	18
Convenience	6	40
Service	19	39
Vacancies	14	29
Retail Warehousing	1	2
Total	49	100

5. Kilmallock

Kilmallock is an historic town in south County Limerick, near the border with County Cork. The remains of medieval walls which encircled the settlement are still visible as are the ruins of a church to the rear of Main Street. It is the only of the main shopping centres in the county not located on the N21 road. It is located to the east of the N20 Limerick to Cork road, about three miles from Charleville, The Dublin–Cork railway line passes by the town, but the station is now closed, the nearest train station now being at Charleville.

It is a centre for horse breeding and many stallion farms are located in the district. There is also a sports ground situated directly to the south of the main street two two access points directly off of it.

Kilmallock – Diversity of Uses	
Use	Description
Banks/Building Societies	A.I.B, Bank of Ireland, Kilmallock Credit Union
Post Offices	2
Hotels	None.
Restaurants	Sargeant Pepper's t/a, Megabytes t/a, Golden Mill Chinese Restaurant
Bars	Flanagan's Bar, Slavin's, Lynch's Bar, Houlihan's Bar, Kelly's Lounge, Boot Room Bar, Fitzgerald's, Oruairbs Bar, Daffy's Bar, PJ's Bar/The Matrix Club
Cinemas	None
Theatres	Friars Gate Theatre
Offices	William Lee's Solicitors Office, F D C Accountants & Tax Consultants, National Insurance Ltd, Maurice A Power Law Offices, and Senator John Cregan's Office, Limerick County Office, GVM Auctioneers, D HERLIHY Solicitors,, Murray Cloney Solicitors.
Residential	There are a number of residential properties interspersed amongst the retail outlets on the prime shopping street.

Kilmallock is a traditional linear shopping centre providing a good range of goods and services to its local catchments' population. It is located close to Charleville which is situated on the main N20 route and has a larger and more buoyant appearance. Kilmallock appears to live in its shadow but nevertheless provides a good range of services, including many community facilities. Convenience retailing is small scale consisting of top up shopping outlets whilst comparison retailing is similarly small in scale with no more than one shop in each sector. Whilst there are quite a high number of vacancies, these are dispersed throughout the centre which retains a prosperous appearance due to the large mix of residential and service units along Main Street (which are not shown on the table below) and the high quality streetscape.

Proportion of retail Representation in Kilmallock		
Representation	Total	
	No.	%
Comparison	9	23
Convenience	7	18
Service	6	15
Vacancies	17	44
Retail Warehousing	0	0
Total	39	100

CLARE COUNTY COUNCIL

1. Ennis

Ennis is the county town of Clare, is the largest town and the sixth largest town in Ireland. This historically important market town is situated on the river Fergus some 23 miles to the northwest of Limerick on the main N18 road. It is about twelve miles from Shannon airport. The Town Centre consists of narrow streets and laneways dating back to medieval times. The main shopping streets comprise Parnell Street, which is pedestrianised, O'Connell Street, Bindon Street and Abbey Street which are all one way. Market Square remains home to a regular Saturday market. Ennis has become an important centre of Irish traditional music and hosts the Fleadh Nua, the second largest traditional music festival in Ireland, held each May.

Bus services are provided to Shannon Airport, Galway, Limerick, Cork, Dublin and all routes in between and run nearly every hour. Fourteen rail services per day are now provided to and from Limerick City, from where connecting rail services are available to both Dublin and Cork. The Western Railway Corridor north of Ennis (to Athenry and Galway) is expected to reopen in 2009.

Ennis Town Centre– Diversity of Uses	
Use	Description
Banks/Building Societies	Ulster Bank, First Active, National Irish bank, Irish Nationwide, E.B.S. A..I.B, Halifax, Permanent TSB
Post Offices	2 : Bank Place and at Market Square
Hotels	Old Country, Temple Gate Hotel and The Queen's Hotel in the town centre
Restaurants	Brogan's Restaurant, Pearl City, Prince Dragon, Silver House, Supermacs, Puccino's Sandwich Bar, Bagel Factory, Café Aroma, Enzo's t/a, BB's Coffee and Muffins, Valan's Bistro, Country Kitchen, O' Brien's Sandwich bar, Thai Palace, Domino's Pizza t/a, Sicilian Restaurant, Subway, Zucchini, Beehive Café, Tulsi Indian Restaurant, Coco Restaurant, Numero Unop Pizza, Food Heaven, Friar Tuck's t/a, Café Haus, Rogue's, JD's Coffee House, O'Connors, Fortune House t/a
Bars	Brandon's PH, Moloney's PH, Diamond Bar, Michael Fawl PH, Brewery Bar, Knoxs Bar, Library Bar, Cruises Bar, Cibro Wine Bar, Ciaran's Bar, The Cloisters Bar, Mossy Sullivan's PH, Lucus Bar, The Corner Bar, Charlie Stewarts Bar, Mr Q's Bar, Griffen Bar, Taylor's Bar, O'Halloran's Bar, Henry's Bar, The Usual place, Lady Luck, Woody's PH, Moroney's Bar, Paddy Quin's Bar

Cinemas	Empire Multiplex
Theatres	On Mill Road and on Gort Road (outside town centre)
Offices	Ennis Tourist Office, Cashin Solicitors, Philip O'Reilly Auctioneers, Costello Auctioneers, Clare County Council, M Brennan Insurance, Hibernian Insurance, DNG O'Sullivan Hurley Estate Agent, Gerard Declan Insurance, O'Neil Kely Accountant, Fion Trust Financial Advice, Philip O'Reilly Estate Agent, Vaughn and Co Accountant, Lesley Holland Mortgage Broker, Paddy Browne Estate Agent, Brian McHan Solicitors, AXA Insurance Office
Residential	Predominantly commercial development in the centre.

Ennis is a traditional large town with attractive but small scale shopping streets and square, old market areas and other retail pockets. It contains a pleasant mixture of cafes, bars, restaurants, speciality and independent fashion boutiques. Whilst the High Street has attractive facades the retail offer is limited.

The construction of the new Dunnes store, linked to O'Connell Street via a new retail mall has created a modern high quality anchor for the town which links well with the traditional High Street area.

Edge of centre, the Ennis Shopping Centre (anchored by Tesco) and the Aldi discount food store opposite, provide a good convenience offer with evidence of pedestrian linkage along Francis Street into the town centre itself.

Proportion of Retail Representation in Ennis Town Centre		
Representation	Total	
	No.	%
Comparison	152	60
Convenience	23	9
Service	37	15
Vacancies	41	16
Retail Warehousing	0	0
Total	253	100

2. Ennis – Out of Centre

Outside of the town centre there are a number of retail outlets spread around the urban area, or predominantly they fall on the eastern side, off of the Clonn Road.

i) Ennis Shopping Centre

This scheme is situated about 300 metres to the east of the town centre along Francis Street. The scheme comprises a covered shopping mall anchored by a Tesco store supported by a pay and display car park. There is also a range of supporting convenience and durable shops and services together with a public house. It is an extremely busy centre and is supported by the separate Aldi discount food store opposite.

ii) Quinn Road Business Park

The Quinn Road area comprises an extensive traditional industrial area accommodating a diverse range of uses. It includes a number of retail or quasi-retail outlets, none of them are situated on a readily identifiable retail park. A new development, calling itself “Riverside Retail and Business Park” accommodates the bulk of new retail/quasi-retail floorspace, although the retail uses are spread throughout the area. They comprise:

- Carpetright
- Toymaster
- Right Price Tiles
- Room by Room
- Market Hardwear DIY
- The Craft Box
- Living by Morgan
- Blath Inis Garden Centre
- Sofa Centre
- Ennis Carpet Centre

There are 7 vacant retail units being advertised to let, 6 at 280 sq m each and 1 at 975 sq m.

iii) Clonn Road Business Park

A traditional industrial area accommodating a range of different uses, including Ryan’s Furniture and Carpets.

iv) Doora Industrial Estate

A traditional industrial area accommodating a range of different uses, including Ennis Pet and Horse World.

v) BallyMaley Retail Park

Situated to the north of Ennis, on the N18 Gort Road, this new development comprise 6 vacant retail warehouse units available in a range of sizes from 730 sq m – 1,250 sq m. None of the units have ever been let.

vi) Rosslevan Shopping Centre –

The Rosslevan Shopping Centre is situated on the eastern side of Ennis on the R352 Tulla Road. It comprises an 'L' shaped terrace of small retail units fronting onto a free car park of about 100 spaces. It provides a primarily neighbourhood shopping function being anchored by a Liddies Costcutter convenience store supported by an off licence and butcher, a range of retail services, takeaway restaurants, a bank and bookmakers. There is a very small range of three comparison outlets.

3. Shannon

Shannon, which is named after the river near which it stands, is located just off the N19 road, a spur of the N18 road between Limerick and Ennis, about 12 miles northwest of Limerick. It is one of only three planned town in the Republic of Ireland. It was given town status on 1 January 1982. The town was built on reclaimed marshland alongside the newly established Shannon Airport, along with the Shannon Free Zone industrial estate. The town itself was intended as a home for the thousands of workers at the airport, surrounding industries and support services.

Diversity of Uses in Shannon Skycourt	
Use	Description
Banks/Building Societies	Bank of Ireland, Ulster Bank, A.I.B.
Post Offices	1
Hotels	0
Restaurants	Shannon Knights Inn, Golden Mountain Restaurant, Café 2000, Rocket Restaurant, Food Court
Bars	Shannon Knights Inn, Murphy's Bar
Cinemas	None
Theatres	None

Offices	A number of office developments surround the Shopping Centre, Sherry Fitzgerald estate agency, Michael Houlihan Solicitors, Blue Sky Mortgages and FB Keating Solicitors are represented within.
Residential	There are no residential developments in the purpose built town centre. However there are large residential developments in close proximity

Shopping provision is made in a purpose built predominantly single storey covered Skycourt shopping centre. It is primarily a comparison shopping destination (at least by number of units) with a relatively extensive range of comparison shops. Retailing is anchored by a large Dunnes Stores which acts as a main food shopping destination and also sells an extensive range of clothing. In addition to the shopping, there is also a good range of services and a more limited range of food and drink provision. A former Tesco store closed when their new outlet at Coonagh Cross opened – it remains vacant.

Further retail provision is provided around the exterior of the shopping centre, including a Lidl discount store. The scheme is served by extensive surface and multi-storey parking (first two hours free).

Proportion of Retail Representation in Shannon Skycourt		
Representation	Total	
	No.	%
Comparison	26	47
Convenience	6	11
Service	9	16
Vacancies	14	25
Retail Warehousing	0	0
Total	55	100

To the east of the shopping centre further 'town centre' uses are provided to the north of Airport Road. These comprise a McDonalds drive-thru restaurant, Shannon Oaks hotel and bar. In October 2009, planning permission was granted for a mixed use development at Smithstown (referred to as the Greenband application) for a total of 14,850sq m gross including two retail warehouses (1,351sq m net), one retail warehouse with garden centre (2,547 sq m net), one retail unit (980sq m net); one discount foodstore (1,120sq m net); and a medical centre including four retail outlets (448sq m gross). Other uses included in the permission include a motor showroom and Business Centre (i.e. offices).

Existing land uses to the north of this area include a mixed use industrial based area which also includes a wide variety of bulky comparison goods outlets. This area has been redesignated in the South Clare Local Area Plan 2009-2015 for enterprise development and

light industrial purposes, although existing traders are permitted to increase their retail floorspace by up to 15%.

Clare County Council has produced a Masterplan which proposes to extend the town centre to the north of Skycourt. The document sets out the physical framework and guidance for future developments. It proposes that the new retail area, 'Shannon Town North' provides a mix of comparison (15,000sq m) and convenience (5,000sq m) goods together with a range of tourism and leisure related activities to include cafes, hotel, conference, office and fitness facilities (15,000sq m). The extension is to be developed in close association with the existing town centre and is to incorporate carbon neutral design policies.

4. Kilrush

Kilrush is a large coastal market town located near the mouth of the River Shannon in the south-west of the county. It is a town of great historical significance, being one of the listed Heritage Towns of Ireland, recognising its legacy as a landlord estate town with a rich maritime and market tradition. The old port is now home to a 120 berth marina with lock gate access to the Shannon Estuary and the Atlantic Ocean. Kilrush also hosts a traditional Irish music festival in August of each year.

Kilrush – Diversity of Uses	
Use	Description
Banks/Building Societies	A.I.B. Bank of Ireland, Credit Union, Irish Permanent,
Post Offices	1
Hotels	Central Guest House, Buggles B&B, Kilrush B&B
Restaurants	Silver House, Kelly's Restaurant, Tasty's Diner, Chira Express, Haven Arms, Harbour Restauarant, Quayside Restaurant, Golden Wok takeaway, Caffey's Café, Golden Pizza takeaway
Bars	Kelly's Bar, O'Brien's Pub, Gallagher's Bar, Johnson's Lounge, O'Looney's Bar, Charlie Martin's, P Clancy Bar, Percy French Bar
Cinemas	None
Theatres	None
Offices	OBAIR Local Employment Group, Farrell Insurance & Auctioneers, Kilrush Urban District Council, O'Doherty & O'Kelly Solicitors, Kilrush Chamber of Commerce
Residential	A small number of residential properties are interspersed amongst commercial and retail ones, mainly along Frances Street.

Retail provision is focussed on the Market Square and streets leading off. A newly constructed parade fronts the car park to the rear of Burton Street. The town centre provides a very attractive and compact shopping environment with a good range of comparison and convenience retail outlets. Taken in context with its attractive seaside location, and the

grandeur of Frances Street leading down to the marina, Kilrush offers significant potential as a tourist and visitor centre. There is capacity to extend the retail provision through the development of land to the rear of Henry Street.

Out of centre a large modern Tesco provides modern convenience shopping facilities, complimenting the smaller but popular town centre Queally's Super Value.

Proportion of Retail Representation in Kilrush		
Representation	Total	
	No.	%
Comparison	64	50
Convenience	20	16
Service	16	12
Vacancies	28	22
Retail Warehousing	0	0
Total	128	100

5. Ennistymon

Ennistimon is an attractive historic town situated on a sloping hill. Situated close to the seaside town of Lahinch, Ennistimon is at the junction of N67 with the N85 on the River Cullenaagh. As it passes through the town the river goes over the falls which can be viewed from the bridge in the centre. The falls are sometimes known as The Cascades which runs to the rear of properties fronting Main Street. It is popular tourist town with a typical main street, with many traditional pubs.

Having crossed the River, the majority of shops are to the left up the hill which is now anchored by the new Super Valu Store. This stretch has parking on both sides, parallel on the right (going from the bridge towards the supermarket), and end-on on the left. There is also a small car park opposite Café Vienna.

Ennistymon – Diversity of Uses	
Use	Description
Banks/Building Societies	A.I.B, Bank of Ireland, Credit Union
Post Offices	1
Hotels	Falls Hotel
Restaurants	The Sungan Chair Restaurant, Townhouse Restaurant, Café Vienna
Bars	Marriman Pub, Cullinan's Pub, Nagles Undertakers bar, O'Donnallain Pub, McMahon's Bar, Cooley's Pub, Daly's Pub, Stack Pub, Begley's Pub, Davoren's Pub, Eugene's Pub, McNaulty's Bar, Carriggs Pub

Cinemas	None
Theatres	None
Offices	None
Residential	Residential properties are interspersed throughout the retail centre

Ennistimon is essentially a local service centre but with some additional tourist retailing. It is anchored by the new Super Value store which provides a modern main food shopping destination, with ample external and basement parking. The town appears relatively prosperous as it is popular and well used, providing a good range of produce and services.

Representation	Total	
	No.	%
Comparison	22	54
Convenience	10	24
Vacancies	8	20
Retail Warehousing	1	2
Total	41	100

6. Killaloe

Killaloe is situated on the southern bank of the River Shannon at the south end of Lough Derg, about 14 miles north east of Limerick. It has good accessibility being situated just over a mile off the N7 Limerick to Nenagh road. Whilst the settlement spreads across the river, which forms the County boundary with North Tipperary, that part within County Tipperary is known as Ballina and is treated as a separate settlement. The historic bridge across the river is attractive but single track which leads to considerable congestion, particularly during the summer months. The surrounding area is popular for hill-walking.

Killaloe – Diversity of Uses	
Use	Description
Banks/Building Societies	A.I.B, Derg Credit Union Ltd
Post Offices	1
Hotels	Waterman's Lodge Hotel, Kincora Court Hotel, several guest houses /bed and breakfasts.
Restaurants	Abbacus Chinese t/a, River Spice Indian t/a, Wood Brothers, Church Street Brasserie, Café Latte Coffee Bar
Bars	Reddan's bar, Anchor Inn, Brendon Brace Pub, Top of the Town Bar, Property Bar and Eating House, Seanachoi Bar, M Dreddon Bar
Cinemas	None
Theatres	None
Offices	Tourist Office (seasonal), W&A Gilbey Estate Agents, Solicitors.

Residential	Established residential properties to the west of the town
-------------	--

Killaloe provides facilities to serve both its local population and a wider catchment attracted by its tourism function. The traditional provision along Main Street/Church Street has been supplemented, and in large part with respect to convenience provision, supplanted by the development of the Convent Hill shopping centre to the rear of properties fronting the south side of Main Street. This development is anchored by a large Super Valu supermarket acting as a main food destination, which in turn is supported by 8 other retail units (at ground and first floors), a doctor's surgery and its own dedicated free car park (maximum stay 2 hours). The development is linked to main street via a footpath.

The town provides a more expansive range of comparison shops than would be expected from its size, especially in comparison with other centres in County Clare. Many of the outlets are pitched quite upmarket. Apart from the Super Valu, there is limited other convenience provision, and the service provision is also largely aimed at the local market. Given its location and function, the provision of food and drink outlets also seems limited and again aimed at the local market.

Proportion of Retail Representation in Killaloe		
Representation	Total	
	No.	%
Comparison	17	55
Convenience	4	13
Service	6	19
Vacancies	4	13
Retail Warehousing		
Total	31	100

7. Kilkee

Kilkee is a small tourist town on the Atlantic coast on the N67 road. It is about 53 miles from Limerick via Ennis. This 19th Century town is a popular seaside resort, with safe bathing, many walking routes and is popular as a dive location. It is served by regular bus services provided by Bus Éireann which connects to Kilrush, Ennis and Limerick. The town is undergoing significant expansion with the development of hotels, estates and other forms of housing. The town's main source of income is the tourist industry, with the town providing restaurants, pubs and cafés and a nightclub, together with the Water World complex situated on the sea front on the edge of the town centre. The seasonal nature of the town's trade is reflected in the number of units which close in the off season.

Kilkee – Diversity of Uses	
Use	Description
Banks/Building Societies	A.I.B, Bank of Ireland, Credit Union
Post Offices	1
Hotels	Kilkee Hotel, Stella Maris Hotel, Halpins Hotel, The Strand Hotel. Lynch's B&B, Tecora Houe B&B
Restaurants	Ryan's Restaurant, Yeung's Chinese Restaurant, Vittles Restaurant, Donald C Chinese, Norton's Fish Restaurant, Maid's Ice Cream Parlour, Side Tracks, Mario's Fish & Chips, Strand Restaurant
Bars	O'Mara's Pub, Greyhound Bar, The Central Bar, Marble Bar, Myles Creek bar, Marine Bar, Anne Sailin, Scott's Bar, O'Naughton's Bar, Fitzpatrick's Bar, Marillo's Bar Strand Bar
Cinemas	Kilkee Complex
Theatres	None
Offices	Tourist Office (seasonal). Kilkee Business Centre, Kilkee Accountancy Services
Residential	Residential properties are interspersed amongst commercial outlets in the town

The town is served by a relatively large library, and has an indoor swimming pool on the seafront. There are three development sites within the defined town centre providing a mix of new commercial units and residential. Only one of these schemes is solely devoted to residential development.

The town has a good range of small convenience outlets but no supermarkets. The comparison goods shopping function is very limited – even more so in the off season. Whilst the village centre is very widely defined the main commercial focus is on O'Curry Street, with some locally orientated provision on O'Connell Street. Whilst there are some commercial outlets on Erin Street, these are primarily hotel related.

Proportion of Retail Representation in Kilkee		
Representation	Total	
	No.	%
Comparison	3	14
Convenience	9	40
Service	3	14
Vacancies	7	32
Retail Warehousing	0	0
Total	22	100

8. Scarriff

Scarriff is situated in eastern County Clare on the western bank of Lough Derg about 21 miles north of Limerick. It is not served directly by any main roads, being situated at the junction of a number of 'R' Class roads. This small market town is constructed on a hill with Main Street running straight up the side of the hill to a triangular open public square at the crown. Cars park without restriction along kerb side but road is generally wide enough for two vehicles to pass although congestion does occur on north side of square in front of Spa. The townscape is not unpleasant but is relatively shabby with much of it being in need of a paint.

The town provides a range of local services meeting the day to day needs of its catchment population. It has a good range of small scale convenience provision supported by a range of personal (i.e. hair and beauty salons) and medical (i.e. medical and dental) services, bars and restaurants, and local professional services. The centre however only has a very limited range of comparison shopping outlets.

Scarriff – Diversity of Uses	
Use	Description
Banks/Building Societies	Bank of Ireland. Derg Credit Union
Post Offices	1
Hotels	Mary Connolly's self catering, Scarriff Court Hotel (vacant)
Restaurants	Spice of Life takeaway' Brien and Jo's Café, Merriman's Restaurant and Wine Bar, Café India, Chop Sticks, Bell and Pepper Bistro, McNamara's Restaurant and Bar.
Bars	Molloy's Bar, Ryan's Bar, Henchy's Bar, The Harbour Bar, J Malony Pub, Carling Bar
Cinemas	None
Theatres	None
Offices	Baine and Son Acutioneer, Loughmore & Co, Solicitors, Nash Solicitors, Systems Information; O'Brien Estate Agent, Hogan Computer Services, J Wye Accountant
Residential	Most of the residential development is located to the north of the town although there is a mix of residential property throughout the commercial area.

Proportion of Retail Representation in Scarriff		
Representation	Total	
	No.	%
Comparison	4	24
Convenience	9	52
Vacancies	4	24
Retail Warehousing	0	0
Total	17	100

9. Milltown Malbay

Milltown Malbay is situated close to Spanish Point on the western Atlantic coast. It is situated on the N67 about 41 miles north west of Limerick via Ennis. The shopping provision fronts both sides of Main Street, which is a busy through route. The centre lies astride the meeting point of six roads and so is very accessible.

Milltown Malbay – Diversity of Uses	
Use	Description
Banks/Building Societies	Bank of Ireland, Credit Union
Post Offices	1
Hotels	Central Hotel
Restaurants	The Malbay Restaurant and Pub, O'Loughlins Restaurant and Pub, Baker's Cafe
Bars	The Players Club Bar Bistro, Grogans, Queally's, Michael A's, Marrinan's, Murphys
Cinemas	None
Theatres	None
Offices	Carrol Estate Agent, Colin Dyne Estate Agent
Residential	Residential properties are interspersed among the retail units on main street

Convenience retailing is provided in two small convenience stores, Londis and Centra, situated at opposite ends of Main Street. The Londis store is supported by a small car park. Neither store appears large enough to provide a full main food shop.

Comparison goods are mainly focussed on the provision of bulky goods and chemist goods. The town does not have any significant comparison shopping function. There are however a good range of pubs and cafes.

Proportion of Retail Representation in Milltown Malbay		
Representation	Total	
	No.	%
Comparison	10	38
Convenience	7	26
Service	2	7
Vacancies	6	22
Retail Warehousing	2	7
Total	27	100

10. Lahinch

Lahinch is located on Liscannor Bay on the northwest Atlantic coast. It is situated on the N67 coast road about 40 miles north west of Limerick via Ennis. The village is a widely known seaside resort popular for surfing and other water sports, and is home to the world famous Lahinch Golf Club. The Lahinch Sea World Complex (comprising a Dolphin Diver shop, swimming pool and Atlantic Aquarium, Gym World and amusements centre) is situated on the edge of the town centre overlooking the large costal pay & display car park used by both shoppers and visitors.

Lahinch – Diversity of Uses	
Use	Description
Banks/Building Societies	None
Post Offices	2
Hotels	The Claremont Hotel, Atlantic Hotel, Santa Maria, Shamrock Inn, Lahinch Hostel.
Restaurants	Waves, Joe's Café, Pearl Garden, Surf Café, Chippers and La Basmasti, Caffee Dock, Europer
Bars	Flanagan's Bar, The 19 th Bar, Kenny's Pub, The Corner Stone Pub, Village Inn, Danny Mack's
Cinemas	None
Theatres	None
Other Leisure	Coast Nightclub, Sea World (edge of centre)
Offices	Tourist Office (seasonal), Lyden Estate Agents, Property Plus Estate Agents
Residential	Interspersed amongst the commercial properties

There is a relatively new retail development on land to the rear of Main Street comprising a parade of up to six small units with 14 free on street parking in front. Four of the units are occupied by a centre store providing the largest convenience outlet in the town. The remaining two units are vacant although one does appear to have been occupied at some time.

Proportion of Retail Representation in Lahinch		
Representation	Total	
	No.	%
Comparison	13	52
Convenience	3	12
Service	3	12
Vacancies	6	24
Retail Warehousing	0	0
Total	25	100

There are surprisingly few retail services in the town, comprising mainly hairdressers. There is one site underdevelopment at present overlooking the end of the main street but this appears to be for residential use. Retail provision in the town is largely slanted to serving visitor trade.

11. Corofin

Corofin is a small, picturesque village on the River Fergus situated 12 km (7 miles) north from the county town of Ennis, and on the southern edge of the upland limestone region of The Burren. The town is also known as "The Gateway to the Burren" or "The Angler's Paradise".

It is a small linear village with shops fronting both sides of Main Street which runs across the top of a hill. The road to Gort runs perpendicular from Main Street and accommodates public parking, a church and the Clare Heritage Centre genealogical research centre. There is also a museum 100m further down the road.

Corofin – Diversity of Uses	
Use	Description
Banks/Building Societies	None
Post Offices	1
Hotels	1 hostel
Restaurants	Bofey Quinns, Ming Kee Chinese, Clare's Kitchen Cafe
Bars	Angler's Rest, Bofey Quinn's, Corofin Arms, Mack's Bar, Inchiquin Inn,
Cinemas	None
Theatres	None
Offices	Tom O'Flaherty Financial Consultant
Residential	Residential properties to the east of the village near the school with some properties along the main street.

There is no evidence of any recent new development. There are few service uses comprising hairdressers and a launderette. There is a Texaco garage at the western end of Main Street.

The comparison shopping function is very limited and is targeted at meeting day to day needs. The convenience provision is also limited comprising three small convenience stores and a butcher.

Proportion of retail Representation in Corofin		
Representation	Total	
	No.	%

Comparison	4	33
Convenience	4	33
Service	2	17
Vacancies	2	17
Retail Warehousing	0	0
Total	12	100

12. Newmarket on Fergus

Newmarket on Fergus is situated between Limerick and Ennis, about 15 miles from Limerick. It lies on the River Fergus and is served by the main N18 Limerick–Ennis road, which passed through the town until it was bypassed in 2003. It's centre is situated around the junction of the Ennis Road with the Ballycar Road. The southern end of the centre is marked by the bridge over the watercourse and the entrance to O'Regan Park.

The well known tourist attractions of Bunratty Castle and Dromoland Castle are nearby but the town does not appear to benefit from any spin off benefits.

Newmarket on Fergus – Diversity of Uses	
Use	Description
Banks/Building Societies	St Peter and Paul Credit Union
Post Offices	1
Hotels	The Hunter's Lodge Guest House
Restaurants	Julia's Café, Eastern and Oriental t/a, Mamma Mia Pizza t/a
Bars	The Pub, Tradaree Arms, The Weavers Inn, O'Neils, Sports Bar.
Cinemas	None
Theatres	None
Offices	McCarthy Property Relocation Services, The Conference Company
Residential	Residential properties are interspersed along the main street

Newmarket on Fergus is a pleasant rural town providing a limited range of convenience, service and catered food and drink provision to a local catchment population. Whilst the table below identifies a proportionally high level of vacancies, half of these are situated in a new development outside of the town centre which has not yet been let (only one out of five units being occupied). Within the defined town centre there is a high proportion of residential properties with retail units interspersed sparsely amongst them. There are no great focus of vacant units and the centre has a well kept appearance.

The level of provision for all shopping and service uses is relatively low. The single largest unit is a new mid sized Super Valu supermarket situated outside of the centre to the north. This store would support a main food shop albeit with a limited range of choice.

Proportion of Retail Representation in Newmarket on Fergus		
Representation	Total	
	No.	%
Comparison	2	12
Convenience	4	24
Service	3	18
Vacancies	8	46
Retail Warehousing	0	0
Total	17	100

13. Sixmilebridge

Sixmilebridge is a rapidly expanding settlement village in County Clare located about midway between Ennis and Limerick city (which is about 9 miles to the southeast). The town is a short distance away from the main N18 road, being on the old "back road" between the two. The Limerick–Ennis railway line passes through the village. Whilst the station was closed a number of years ago, but Clare County Council plans to reopen it in 2009. Not only is the town situated at what was a former main highway crossroads, but also at a crossing over the Owenogarney or Ratly River.

Sixmilebridge – Diversity of Uses	
Use	Description
Banks/Building Societies	Credit Union, Bank of Ireland ATM
Post Offices	One
Hotels	None
Restaurants	New Dragon Chinese, Dine & Wine Bistro, Red Rocks Takeaway
Bars	Mill Bar, Greyhound Bar, Gilly's Bar, Casey's, McGregors, Old House, Reddans.
Cinemas	None
Theatres	None
Offices	Michelle O'Sullivan Estate Agent, Lynch Financial Services, John Shaw Architectural Services, Stiafan Fitzpatrick Solicitors.
Residential	Residential development surround the town and are interspersed through the commercialised area.

Sixmilebridge acts as a local service centre and is well provided with local services including two doctor's surgeries, a dental surgery, library and a number of professional offices. There is also a large general auction house on the western edge of the centre, and a garage on the eastern. The town's retail function is however extremely limited. There are only two comparison goods shops and one general convenience goods store, an off licence and a butchers.

Proportion of Retail Representation in Sixmilebridge		
Representation	Total	
	No.	%
Comparison	2	17
Convenience	3	25
Service	2	17
Vacancies	5	41
Retail Warehousing		
Total	12	100

A recent commercial development adjacent to the bridge, the Garna House Retail Centre, has only been partially successful with three vacant units remaining.

14. Tulla

Tulla is a large rural village focused on a hill overlooking undulating green countryside about 15km east of Ennis. The village addresses the ruin of ancient church and graveyard which commands the highest point in the village. The village is the commercial centre for Tulla parish and the surrounding hinterland. The shops front onto both sides of Main Street in a mix of commercial, community and residential uses.

Tulla – Diversity of Uses	
Use	Description
Banks/Building Societies	Bank of Ireland, St Francis Credit Union
Post Offices	1
Hotels	None
Restaurants	Antach Takeaway and restaurant, Flappers Restaurant
Bars	M McArthur, Minogue's, Eamon Doran's, Power House, An Teach Oi, Murphys
Cinemas	None
Theatres	None
Offices	Tulla Business Centre, Department of Social Welfare Office
Residential	Residential development is concentrated to the north and south of the main street however there is a also a significant representation of residential units along Main street.

Parking is along Main Street, which as a result can become quite congested as passing is limited. There is a small off street car park at the peak of the hill (with glass recycling and can recycling facilities) however this does not appear to be very well used as it is quite steep leading up to the ruins of the church on the very top of the hill. The parking is, in any event, restricted and appears to be used predominantly by residential properties fronting the area.

Proportion of retail Representation in Tulla		
Representation	Total	
	No.	%
Comparison	3	20
Convenience	5	33
Service	3	20
Vacancies	4	27
Retail Warehousing	0	0
Total	15	100

RETAIL STRATEGY FOR THE

MID WEST REGION

2010-2016

APPENDIX 3

Household Telephone Survey

RETAIL STRATEGY FOR THE

MID WEST REGION

2010-2016

APPENDIX 3A

Objectives and Methodology

REVIEW OF MID WEST RETAIL STRATEGY

Quantitative Retail Floorspace Need Assessment

The Household Telephone Survey: Objectives and Methodology

Objectives of the Survey

1. The household telephone survey forms an important role in the quantitative need assessment since it provides important information on the current pattern of shopping activity throughout the Mid West and surrounding areas. As such, it forms the foundation upon which the retail floorspace need estimates are built.
2. A major aim of the survey is to generate quantitative data on consumer retail expenditure flows between areas or zones (where people live) and retail centres (where they spend their money). This has been carried out for the following three types of shopping:-
 - convenience goods;
 - non-bulky comparison goods;
 - bulky comparison goods.

Definition of the Survey Area

3. The outer boundary of the household survey area was agreed with the Councils. The survey area is shown in **Figure 1.1** in the main report. It is more extensive than the Mid West Region boundary, since it has been drawn to encompass the shopping catchment area of Limerick City Centre, which exerts a major influence on shopper behaviour over a wide area.

Definition of the Expenditure Zones

4. For the purpose of sampling and analysis, the survey area has been divided into 11 zones. These zones are defined on the basis of ED boundaries and each zone comprises of a number of ED's. In broad terms the zones relate to natural shopping activity areas on the ground and to the size and location of retail centres.
5. **Figure 4.1** in the main report shows the locations and general configuration of the 11 zones throughout the survey area. These zones were agreed with the Councils prior to the survey being carried out. Zones 1 to 3 inclusive cover Limerick City, whilst zones 4 to 6 constitute Limerick County. Similarly, zones 7 to 9 cover Clare County and zone 10 equates to North Tipperary. Zone 11 covers part of South Tipperary and is within the South East Region. This area was included in the survey because it generates expenditure that flows into the Mid West.

Sampling

6. In consultation with the Councils an overall target sample of 825 completed telephone interviews was agreed which equates to 75 interviews per zone.
7. Within each of the 11 zones, the interview sample was drawn randomly and in proportion to the distribution of population. This ensures the results of the survey reflect for each zone the density of population on the ground. At the analysis stage of the survey, individual samples are then weighted to their appropriate representation within the survey population to produce an overall result which is representative of the survey area as a whole. Without this weighting, the less densely populated zones would have a disproportionately large effect on the overall survey results, contrary to their population size. The whole principle of weighting therefore allows the characteristics of less densely populated zones to be represented without the unnecessary cost of a grossly inflated sample. **Appendix 3B** provides a more detailed statistical synopsis of the sampling

methodology and the degree of confidence which can be attributed to the survey results.

The Survey Questionnaire

8. The survey questionnaire was drafted in consultation with the Councils and their agreement was obtained prior to the commencement of interviewing. A copy of the questionnaire is reproduced in **Appendix 3C**. Fieldwork for the household survey was carried out between 23rd February and 8th March, 2009.

Survey Analysis and Results

9. In so far as the survey results are used to inform the assessment of retail floorspace need within the Mid West Region, the key data which the survey generates is the percentage market share (in terms of expenditure) of the towns and other centres within each of the 11 zones. This is analysed separately for convenience goods and non-bulky and bulky comparison goods shopping. Using this quantitative information, it is possible to build-up a detailed picture of existing shopper behaviour within the Mid West and the survey area as a whole. In particular, the data allows the existing catchment areas and retail turnovers of main centres to be determined. **Appendix 3D** summarises the key results of the household telephone survey, whilst **Appendix 3E** provides full details of the expenditure market shares produced by the survey for each zone and category of goods. The survey forms the foundation for the retail floorspace need assessment which is presented in full in Section 6 of the main report.

RETAIL STRATEGY FOR THE MID WEST REGION 2010-2016

APPENDIX 3B

**Sample Breakdown and
Statement of Reliability**



BEACON RESEARCH

The Resource Centre, Bridge Street,
Garstang, Lancs PR3 1YB
Tel: 01995 606330
Fax: 01995 605336
E-mail: gurth.beaconresearch@wyrenet.co.uk
VAT Reg No: 712347851

MID-WEST REGION RETAIL STRATEGY

HOUSEHOLD TELEPHONE SURVEY

March 2009

Presented to:

Colliers CRE
9 Marylebone Lane
London
W1U 1HL

Presented by:

Beacon Research
The Resource Centre, Bridge St
Garstang, Lancs PR3 1YB

CONTENTS

- 1.** Background & Methodology
- 2.** Sample Breakdown
- 3.** Statement of Reliability
- 4.** Tabulations by Zone

MID-WEST REGION RETAIL STRATEGY HOUSEHOLD SURVEY (March 2009)

1. BACKGROUND & METHODOLOGY

The client, Colliers CRE, wished to conduct a telephone shopping survey within the Mid-West Region of Ireland and its shopping hinterland. This was to establish the following: -

- Where respondents go for their shopping (e.g. non-bulky and bulky comparison goods, and convenience goods)
- How frequently they visit their main and secondary centre.
- How their expenditure on such goods is divided between main and secondary centres.
- Why they choose their main centres, how they travel and the length of their journey from home.
- Similar information regarding food & grocery shopping.

A total of 827 interviews were completed, in eleven different zones, each zone defined by District Electoral Division (DED). Interviews were conducted over a period of two weeks, between February 23rd February and 8th March 2009.

In order to provide meaningful and reliable data in each of the eleven zones, 75 interviews were allocated to each of the eleven zones (76 interviews were actually completed in 2 of those zones). The results were then weighted, at the analysis stage, to take account of the different populations in each zone and their importance to the overall survey area.

MID-WEST REGION SAMPLE BREAKDOWN

ZONE	Population	%	Achieved Sample	Weighted Sample	Weight
1	21,836	5.2%	75	43	0.573
2	20,909	5.0%	75	41	0.547
3	19,365	4.6%	76	38	0.500
4	70,341	16.7%	75	138	1.840
5	36,887	8.8%	75	72	0.960
6	20,821	5.0%	75	41	0.547
7	46,016	10.9%	76	90	1.184
8	56,444	13.4%	75	111	1.480
9	12,796	3.0%	75	25	0.333
10	68,585	16.3%	75	135	1.800
11	46,472	11.1%	75	91	1.213
TOTAL	420,472	100.00%	827	825	0.998

The sample used for making telephone calls was obtained by Beacon Research from Experian, who supplied names, addresses and telephone numbers by District Electoral Division.

Full details of the samples achieved in each zone and the weightings subsequently applied within the analysis, are shown in the preceding table.

The following table summarises the details of calls made and interview outcome.

	Number	%
Initial sample of telephone numbers	4400	100
Of which:		
Completed interviews	827	18.8
Refusals	304	6.9
Wrong numbers / Unobtainable / Answer phone	590	13.4
No reply (after 4 calls)	871	19.8
Not used	1808	41.1

STATEMENT OF RELIABILITY

Assessment of the standard error: -

1. The Mid-West Region Household Shopping Survey has been undertaken as a series of individual sample surveys within a total of eleven zones. The results from these zones were then weighted to provide a result for the total survey area.
2. The results are subject to the following sampling error, of which there follows an analysis.
3. The following analysis indicates the methodology used to calculate the standard error, with the standard 95% probability of being correct. The formulae for these calculations are as follows:

$$SE\% = \sqrt{\frac{p\% \cdot q\%}{n}}$$

Where p% = sample value recorded

$$q\% = 100\% - p\%$$

n = sample size

And where:

1.96*(SE %) = 95% probability that the correct answer lies in the range calculated.

4. Using the above formulae, we can predict the variation between the sample results and the 'true' values from our knowledge of the size of sample on which the results are based and the number of times that a particular answer is given. The table below illustrates the predicted ranges for the total sample and percentage results at the 95% confidence level.

Approximate sampling tolerances applicable to percentages at or near these levels.

Size of sample on which survey result is based	10% or 90% ±	20% or 80% ±	30% or 70% ±	40% or 60% ±	50% ±
825 interviews	2.05	2.73	3.13	3.34	3.41

For example, with a sample of 825 interviews where 30% give a particular answer, the chances are 19 in 20 that the 'true' value (the value obtained if the whole population had been interviewed) will fall within the range of ± 3.13 percentage points from the sample results.

RETAIL STRATEGY FOR THE

MID WEST REGION

2010-2016

APPENDIX 3C

Survey Questionnaire

**STRICTLY CONFIDENTIAL
BEACON RESEARCH**

**The Resource Centre, Bridge Street, Garstang, Lancs PR3 1YB
Tel: ++441995 606330 Fax: ++441995 605336**

**REVIEW OF MID WEST REGION RETAIL STRATEGY
HOUSEHOLD TELEPHONE SURVEY ON BEHALF OF COLLIERS CRE
(FEBRUARY 2009)**

Name: _____

Address: _____

C1	Age:	16-24	1	45-54	4
		25-34	2	55-64	5
		35-44	3	65 +	6

C2	Gender:	Male	1	Female	2
-----------	---------	------	---	--------	---

C3 Do you have the use of a car for shopping?

Yes	1	No	2
-----	---	----	---

C4 What is the working status of the chief wage earner in your household?

Full/Part time employed	1	Retired	2	Unemployed	3
-------------------------	---	---------	---	------------	---

C5	Day / Time of interview:	Morning	1	Afternoon	2	Evening	3
		Weekday	1	Weekend	2		

Interviewer Signature: _____

Date: _____

Interviewer Name: _____

Good morning / afternoon, my name is

We are doing some research on behalf of Limerick City and Limerick and Clare County Councils in the Mid West region to improve shopping facilities in this area and I'd like to ask you a few questions.

Are you / May I speak to the person responsible for the majority of your household shopping?

YES	1
NO	2 - CLOSE INTERVIEW

As we need to speak to people across a number of areas, could you please tell me the first line of your address?

WRITE IN HERE _____

Refer to quota and check that respondent is eligible for interview (i.e. within specified survey area) - if not, thank and close.

- Q1a** Can I ask you first of all, excluding Mail Order and shopping over the Internet, at which town/city centre or shopping centre or retail park do you do most of your shopping for non-food goods such as clothing & footwear, books, gifts and jewellery?
- Q1b** And how often do you visit..... town/city centre or shopping centre or retail park, for this type of non-food shopping?
- Q1c** And excluding Mail Order and shopping over the Internet, what percentage or proportion of your total expenditure on non-food shopping such as clothing & footwear, books, gifts and jewellery would you say that you do in town/city centre or shopping centre or retail park?
- Q2a** Excluding Mail Order and shopping over the Internet, what is your second most important town/city centre or shopping centre or retail park for non-food goods such as clothing & footwear, books, gifts and jewellery? (SINGLE CODE)
- Q2b** And how often do you visit..... town/city centre or shopping centre or retail park for this type of non-food shopping?
- Q2c** And excluding Mail Order and shopping over the Internet, what percentage or proportion of your total expenditure on non-food shopping such as clothing & footwear, books, gifts and jewellery would you say that you do in town/city centre or shopping centre or retail park?

RECORD ANSWERS BELOW - CHECK PERCENTAGES ADD TO 100% AT Q1c/2c

A	CENTRE	Q1	Q2
	CODE FROM LIST 'A'		
	Local shops (see instructions)	58	58
	Other (Write In)		
	Varies / No particular centre	59	59
	None / Don't shop for these goods	60	60
	None / Don't shop / Disabled	61	61
	None / Don't shop / Internet or mail order only	62	62
	No second centre		63
	DK / Can't remember	64	64
B	FREQUENCY OF VISIT		
	More than once a week	1	1
	Once a week	2	2
	2-3 times a month	3	3
	Once a month	4	4
	Once every 2-3 months	5	5
	Once every 4-6 months	6	6
	Less often	7	7
	DK / Can't remember / Varies	8	8
C	% In Location (Write In)	%	%

Q3a You said that is the town/city centre or shopping centre or retail park where you do most of your clothing & footwear shopping? What is your main reason for choosing that Centre? (SINGLE CODE)

Close to home/convenient	1	Good/Cheap Public Transport to centre	7
Close to work	2	Ease of parking	8
Good choice of shops/range of goods	3	Free/cheap parking	9
Good range of major stores	4	Good quality goods/products	10
Pedestrtrianised streets/attractive environment	5	Part of joint trip to other facility/centre	11
Good prices/Good value for money	6	Other (Write In)	

Q3b How do you normally travel to/from this town/city centre or shopping centre or retail park?

(If more than one mode of transport used, code transport used for longest part of journey)

Car (Driver)	1	Walk	5
Car (Passenger)	2	Cycle	6
Bus	3	Motor Cycle	7
Train	4	Taxi	8
Other (write in)			

Q3c Where does your journey usually start from?

Home	1	(Go to Q3d)
Work	2	(Go to Q4)
Other (write in)_____		(Go to Q4)

ASK ALL SAYING 'HOME' AT Q3c - OTHERS GO TO Q4

Q3d On average, how long does it take you to travel to this town/city centre or shopping centre or retail park from home?

5 minutes or less	1	21 - 25 minutes	5
6 - 10 minutes	2	26 - 30 minutes	6
11 - 15 minutes	3	30 - 60 minutes	7
16 - 20 minutes	4	Over 1 hour	8

ASK ALL:

Q4 At which town/city centre or shopping centre or retail park do you normally undertake most of your Christmas or special occasion shopping? (Write in)

- Q5a** Excluding Mail Order and shopping over the Internet, at which town/city centre or shopping centre or retail park do you do most of your shopping for bulky non-food goods such as DIY, large electrical goods, furniture and carpets (SINGLE CODE)
- Q5b** And how often do you visit town/city centre or shopping centre / retail park for your main bulky goods shopping?
- Q5c** And excluding Mail Order and shopping over the Internet, what percentage or proportion of your total expenditure on bulky non food shopping would you say that you do in town/city centre or shopping centre / retail park?
- Q6a** Excluding Mail Order and shopping over the Internet, which is your second most important town/city centre or shopping centre or retail park for bulky non food shopping? (SINGLE CODE)
- Q6b** And how often do you visit town/city centre or shopping centre / retail park for your main bulky goods shopping?
- Q6c** And Excluding Mail Order and shopping over the Internet, what percentage or proportion of your total expenditure on bulky non food shopping would you say that you do in town/city centre or shopping centre or retail park?

RECORD ANSWERS BELOW - CHECK PERCENTAGES ADD TO 100% AT Q5c/6c

A	CENTRE	Q5	Q6
	CODE FROM LIST 'A'		
	Local shops (see instructions)	58	58
	Other (Write In)		
	None in particular / Varies	59	59
	None / Don't shop for these goods	60	60
	None / Don't shop / Disabled	61	61
	None / Don't shop / Internet or mail order only	62	62
	No second centre		63
	DK / Can't remember	64	64
B	FREQUENCY OF VISIT		
	More than once a week	1	1
	Once a week	2	2
	2-3 times a month	3	3
	Once a month	4	4
	Once every 2-3 months	5	5
	Once every 4-6 months	6	6
	Less often	7	7
	DK / Can't remember / Varies	8	8
C	% In Location (Write In)	%	%

Q7a You said that is the town/city centre or shopping centre or retail park where you do most of your bulky goods non-food shopping? What is your main reason for choosing that Centre?

Close to home/convenient	1	Good/Cheap Public Transport to centre	7
Close to work	2	Ease of parking	8
Good choice of shops/range of goods	3	Free / cheap parking	9
Good range of major stores	4	Good quality goods/products	10
Pedestrtrianised streets / attractive environment	5	Part of joint trip to other facility / centre	11
Good prices/Good value for money	6	Other (Write In)	

Q7b How do you normally travel to/from this town/city centre or shopping centre / retail park? (If more than one mode of transport used, code transport used for longest part of journey)

Car (Driver)	1	Walk	5
Car (Passenger)	2	Cycle	6
Bus	3	Motor Cycle	7
Train	4	Taxi	8
Other (write in)			

Q7c Where does your journey usually start from?

Home	1	(Go to Q7d)
Work	2	(Go to Q8a)
Other (write in)_____		(Go to Q8a)

ASK ALL SAYING 'HOME' AT Q7c - OTHERS GO TO Q8

Q7d On average, how long does it take you to travel to this town/city centre or shopping centre / retail park from home?

5 minutes or less	1	21 - 25 minutes	5
6 - 10 minutes	2	26 - 30 minutes	6
11 - 15 minutes	3	30 - 60 minutes	7
16 - 20 minutes	4	Over 1 hour	8

ASK ALL:

Q8a At which store and location do you usually do most or all of your main food and grocery shopping? (Store and location code needed from separate list - SINGLE CODE)

Q8b And, when during the week would you normally shop at your main food store?

Q9a At which store and location do you usually do your remaining top-up food and grocery shopping? (Store and Centre needed)

RECORD ANSWER BELOW

		Q8a Main Store & Location	Q9a Second Store & Location
A	CODE FROM LIST 'B'		
	Local shops/PO / Corner shop (see instructions)	69	69
	Other (write in)		
	None in particular / Varies	70	70
	None / Don't shop / Disabled	71	71
	None / Internet or mail order only	72	72
	No second store / Top-up store		73
	DK / Can't remember	74	74
B	WHEN SHOP		
	Weekdays (Mon - Fri) Daytime	1	
	Weekdays (Mon - Fri) Evening	2	
	Saturday	3	
	Sunday	4	
	Varies / No particular time	5	

Q10a On average how much do you and your household spend in total on food and groceries each week? (INCLUDE MAIN & TOP-UP SHOPPING)

Q10b Of this amount, how much is spent at the Store where you normally do your main food and grocery shopping?

	€	Cents
Q10a - Total household expenditure on food & groceries		
Q10b - 'Main' store weekly total expenditure		
Q10c - Top-up weekly food expenditure (<i>calculate</i>)		

Note: c is calculated as (Q10a - Q10b)

Q11a You said that..... is your main store for food/grocery shopping. How often do you visit that store for food and grocery shopping?

Three times a week or more often	1	Once a month	5
Twice a week	2	Once every two months	6
Once a week	3	Less often	7
Once a fortnight	4		

Q11b What is the main reason why you and your household choose to shop at the store where you do your main food/grocery shopping? (SINGLE CODE)

Close to home / convenient	1
Close to work	2
Ease of parking	3
Free / cheap parking	4
Good / cheap public transport	5
Wide choice of goods / products	6
Close to other shops	7
Good prices/good value for money	8
Good quality goods / products	9
Other (WRITE IN) _____	

Q11c How do you normally travel to/from this store? (If more than one mode of transport used, code transport used for longest part of journey)

Car (Driver)	1	Walk	5
Car (Passenger)	2	Cycle	6
Bus	3	Motor Cycle	7
Train	4	Taxi	8
Other (write in) _____			

Q11d Where does your journey usually start from?

Home	1	(Go to Q11d)
Work	2	(Go to Q12a)
Other (write in) _____		(Go to Q12a)

ASK ALL SAYING HOME AT Q11e - OTHERS GO TO Q12a

Q11e On average, how long does it take you to travel to this Store from home?

5 minutes or less	1	21 - 25 minutes	5
6 - 10 minutes	2	26 - 30 minutes	6
11 - 15 minutes	3	Over 30 minutes	7
16 - 20 minutes	4		

ASK ALL:

Q12a When you do your main food and grocery shopping at..... do you or your household usually visit any other shops/service outlets in the area as part of that same trip?

Yes 1 (Go to Q12b)

No 2 (Go to Q13)

IF YES ASK Q12b TO Q12d - OTHERS GO TO Q13

Q12b Which town/centre is this? (write in) _____

Q12c And do you drive to the other shops/service outlets, or walk or use another form of transport?

Car (Driver)	1	Walk	5
Car (Passenger)	2	Cycle	6
Bus	3	Motor Cycle	7
Train	4	Taxi	8
Other (write in)			

Q12d And what other shops/services do you normally visit (MULTI-CODE)

Clothing	1
Footwear	2
Leisure Goods (e.g. Books, CDs, DVDs, Toys etc)	3
Jewellery	4
Carpets / Furniture	5
Electrical Goods (e.g. TV, Stereo etc)	6
Household Textiles / Soft Furnishings	7
DIY / Hardware / Garden Products	8
Chemists Goods	9
Health & Beauty Services	10
Catering Services (e.g. Cafes, Takeaways, Pubs, Restaurants etc)	11
Leisure Services (e.g. Travel Agent, Betting Shop, DVD Rental etc)	12
Financial outlets (e.g. Banks, Building Societies)	13
Professional Services (e.g. Solicitor, Accountant)	14
Post Office	15
Specialist food shops (eg Baker, Greengrocer, Butcher, Deli)	16
Newsagent/ Confectioner/ Tobacconist	17
Charity Shop	18
Department/ Variety Store	19
Other type of shop (WRITE IN) _____	

THANK RESPONDENT - CLOSE INTERVIEW - COMPLETE CLASSIFICATION

RETAIL STRATEGY FOR THE

MID WEST REGION

2010-2016

APPENDIX 3D

Key Results

Retail Strategy for the Mid West Region Household Telephone Survey Key Results: Convenience Goods

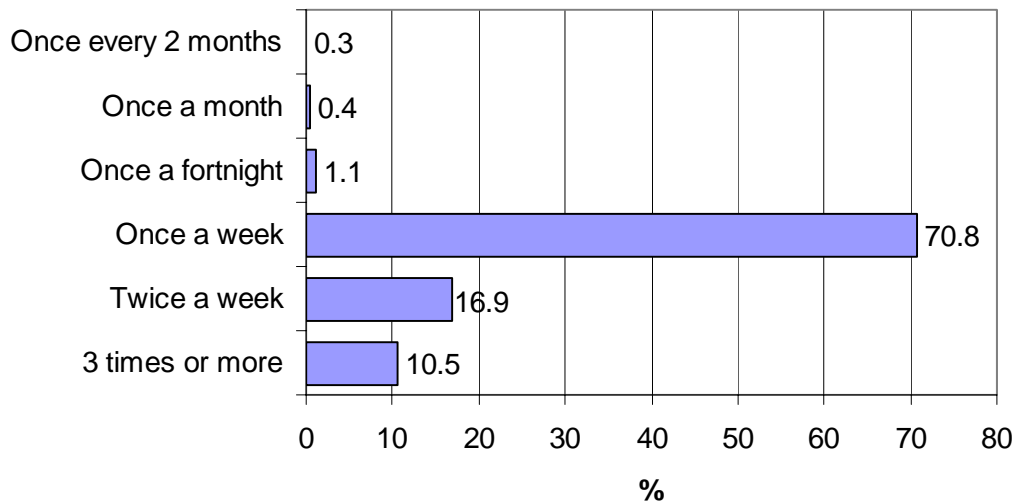
Introduction

- The household survey was conducted in March 2009.
- A total of 826 interviews were targeted over 11 zones, of which 68.7% were female and 31.1% were male.

Convenience Goods Shopping

- The Tesco store in the Crescent Shopping Centre at Dooradoyle and the Dunnes Store on Ennis Road in Jetland are the two most popular destinations for main food shopping, with 6.5% of respondents stating these were their stores of choice. Residents within Zones 3 and 4 were most likely to choose the former store, whilst a fifth of respondents from Zone 7 chose the latter as their preferred store.
- 6.2% of respondents stated their choice of store, whilst 5.8% used their local shop or corner stores. Residents from within Limerick County were most likely to use local stores (16.5%).
- Other responses were distributed thinly across other stores throughout the survey area.
- The majority of convenience goods shoppers made their main food purchases during the daytime (59.1%), with respondents from County Clare the most likely to choose this option (69.8%) and those in Limerick County the least (46.9%).
- A quarter of all respondents stated that they did not have a set time when they went shopping. Respondents from Limerick County were most likely to respond in this manner (37.5%), with respondents from Limerick City the least likely (14.6%).
- Very few respondents stated that they shopped on Sundays (1.7%) or in the evenings (6.9%).
- **Figure 1**, overleaf, illustrates the frequency of visits to preferred main convenience goods stores. The large majority of respondents, 70.8% made visits once a week, with over 85% of respondents from Limerick City choosing to do this.
 - Food shopping twice a week was the second most popular option, with 16.9% of respondents stating that this was their usual pattern of behaviour. This figure rises to 22.6% in County Clare, but falls to 6.7% for respondents from Limerick City.
 - A very small proportion of respondents visited their preferred main convenience goods store once a month or less.

Figure 1 - Frequency of Visits to Main Convenience Goods Store



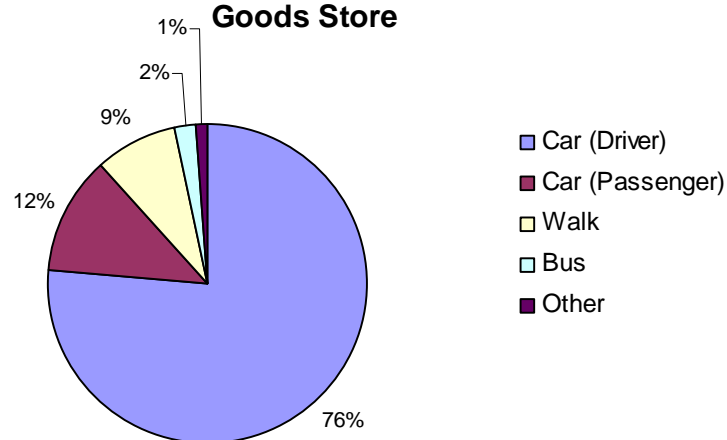
- The main reasons for choosing a main convenience goods store are set out in **Table 1**. The overwhelming majority of respondents stated that convenience and proximity to their home was the main reason for their choice (74.8%). Respondents from within Limerick City were most likely to cite this as their main reason, with respondents from County Clare the least likely.
 - The wide choice of products and goods available in the preferred main convenience goods store was the second most cited reason, with 10.2% of respondents on average choosing this option. For respondents within Limerick City, this was not a consideration, although in zones further from the City it was.
 - Competitive prices for goods and products that are high in quality were two other main considerations for respondents from zones in County Clare and Limerick County,

Table 1 – Reason for Choosing Main Convenience Goods Store

	Convenient	Range of Goods	Good Prices	Other	Good Quality
Average	74.8%	10.2%	6.3%	3.5%	1.6%
Zone 1	100%	0%	0%	0%	0%
Zone 2	97.3%	0%	0%	0%	0%
Zone 3	97.3%	0%	1.4%	0%	0%
Zone 4	100%	0%	0%	0%	0%
Zone 5	98.7%	0%	0%	0%	0%
Zone 6	34.2%	11.0%	20.5%	15.1%	5.5%
Zone 7	71.6%	6.0%	9.0%	6.0%	0%
Zone 8	58.9%	25.0%	8.9%	3.6%	3.6%
Zone 9	39.2%	21.6%	21.6%	7.8%	0%
Zone 10	50%	22.0%	14.0%	4.0%	4.0%
Zone 11	41.5%	30.2%	7.5%	9.4%	3.8%

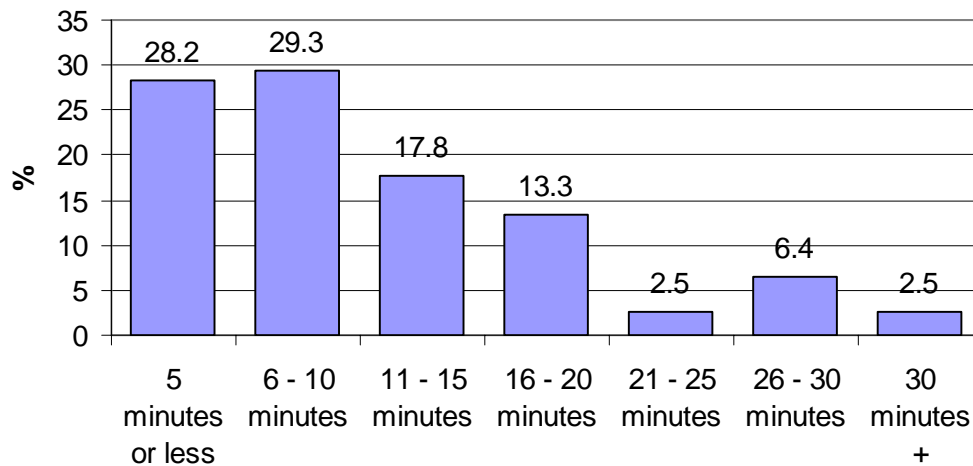
- The preferred modes of transport to main convenience goods store are summarised in **Figure 2**. Over three quarters of respondents stated that driving their own car was their preferred mode of transport (76%), with an additional 12% travelling as a car passenger and 9% of respondents walking to their convenience goods store.
 - Respondents from Limerick County were most likely to drive their own car (79.2%) with fewer than average choosing to walk (4.9%). 10.8% travelled as a car passenger.
 - Those who responded from Limerick City were more likely to walk (13.6%) and less likely to drive their own car or travel as a passenger (67.6% and 12.7% respectively).
 - Respondents from County Clare were most likely to drive (78.8%).

Figure 2 - Mode of Transport to Main Convenience Goods Store



- The average journey times to main convenience goods stores by respondents to the household survey are shown in **Figure 3**, overleaf. Almost 60% of respondents to the survey travelled for less than 10 minutes, with 6 to 10 minutes being the average length of time. Only 2.5% of respondents travelled for more than 30 minutes.
 - Respondents from Limerick City were most likely to travel for between 6 and 10 minutes (44.7%) or for less than 5 minutes (39.8%). Only a very small minority had to travel for longer than 20 minutes.
 - A fifth of respondents from Limerick County travelled for less than 5 minutes to their main convenience goods store of choice, whilst 3.9% had to travel for over 30 minutes. Respondents from County Clare travelled for the longest times on average, with 4.6% travelling for more than 30 minutes.

Figure 3 - Average Length of Journey to Main Convenience Goods Store



- Almost one third of respondents visited other shops or services when they travelled to their main convenience goods shopping (i.e. carried out a linked trip). Respondents from Limerick County were most likely to do this (37.7%).
 - For those respondents undertaking a linked trip, 29.9% said they were likely to shop additionally in Limerick, 18.6% in Ennis, 8.7% in Thurles and 6.5% in Tipperary.
 - The types of stores benefiting most from linked trips were specialist food shops (24.7%), chemists (22.0%), financial outlets (17.3%) or the post office (11.1%).

Retail Strategy for the Mid West Region

Household Telephone Survey

Key Results: Comparison Goods

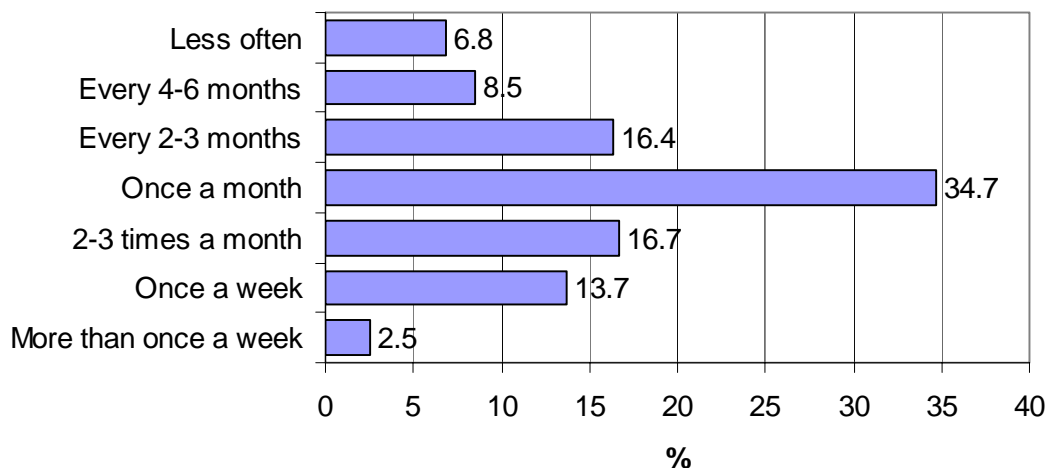
Introduction

- The household survey was carried out between 23 February and 8 March 2009.
- A total of 826 interviews were completed over 11 zones, of which 68.7% were female and 31.1% were male.

Non Bulky Comparison Goods Shopping

- When asked what their main centre for non bulky comparison goods was, 31.3% of respondents responded that Limerick City Centre was their first choice. For those living in zones 1 to 4 (Limerick City and the north of Limerick County), over 60% of residents cited Limerick City Centre as their main shopping venue for non bulky comparison goods shopping.
 - The Crescent Shopping Centre was the second most popular destination for non bulky comparison goods shopping (11.2%), with it being particularly popular with residents in Zone 6 (45.3%).
 - Ennis was the third most popular centre for non bulky comparison goods, with 8.6% of respondents citing this as their main centre. A similar proportion of respondents claimed that they did not have a preferred centre.
- When visiting their main centre for non bulky comparison goods, the largest proportion of interviewees responded that they shopped once a month (34.7%), with equal proportions visiting either every 2 to 3 months (16.4%) or 2 to 3 times a month (16.7%). Only a small number of respondents (2.5%) said they visited their preferred centre more than once a week. Frequency of visits is summarised in **Figure 1**.

Figure 1 - Frequency of Using Main Non Bulky Comparison Goods Centre



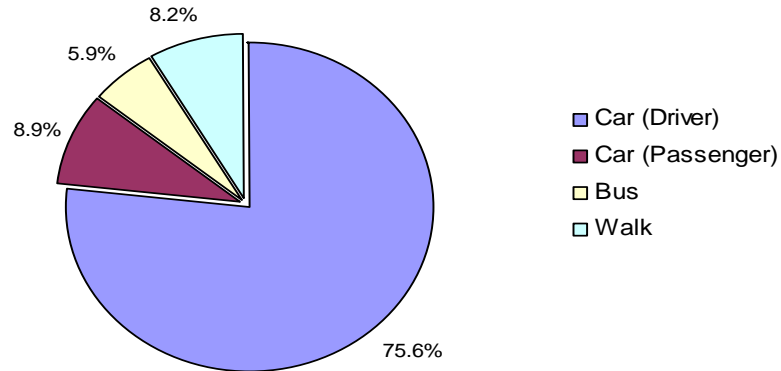
- For those respondents who cited Limerick City Centre as their main destination for non bulky comparison goods shopping, 41.5% visited once a month, whilst 20.4% visited 2 to 3 times a month. Very few respondents (0.9%) visited more than once a week.
- When respondents were asked what their main reasons were for choosing their main non bulky comparison goods centre, the most frequently cited was convenience or proximity to home (72.7%), as illustrated in **Table 1**. Within zones 1 and 4 (Limerick City and the north of Limerick County), this was the only reason why shoppers visited their main centre.
- A good choice of shops and stores was the second most cited reason for choosing their main non bulky comparison goods centre (19.1%), an answer that was most common in the zones furthest from the city centre (e.g. in County Clare and North Tipperary). Very few respondents in zones 1 to 5 (Limerick City and Limerick County) cited this reason for choosing a centre.

Table 1 – Reason for Choosing Non Bulky Comparison Goods Centre

	Convenient	Range of Shops	Good Prices	Other	Ease of Parking
Average	72.7%	19.1%	1.7%	1.6%	1.0%
Zone 1	100.0%	0%	0%	0%	0%
Zone 2	98.7%	0%	0%	0%	0%
Zone 3	97.2%	1.4%	0%	0%	0%
Zone 4	100.0%	0%	0%	0%	0%
Zone 5	97.0%	0%	0%	0%	0%
Zone 6	29.0%	31.9%	5.8%	4.3%	14.5%
Zone 7	60.0%	24.6%	3.1%	3.1%	1.5%
Zone 8	46.0%	42.0%	2.0%	0%	0%
Zone 9	44.2%	51.9%	1.9%	0%	0%
Zone 10	54.7%	37.7%	3.8%	1.9%	0%
Zone 11	51.0%	34.7%	2.0%	8.2%	0%

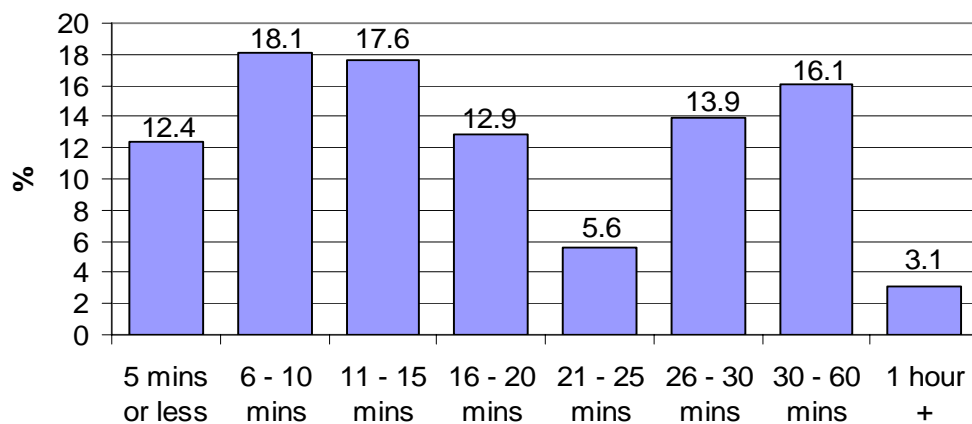
- **Figure 2** overleaf illustrates the mode of transport used by visitors to their main non bulky comparison goods centre. Three quarters of all respondents stated that they usually drive their car to the centre, whilst an equal proportion said that they walked or were a passenger (8%). Less than 6% took the bus to their centre. Very few people took the train, a taxi or cycled.
- Within Limerick City, fewer respondents than average drove their car to the centre – 50% in zones 2 and 3. Conversely, a higher proportion than average walked or took the bus. Residents of Limerick County were more likely to drive their own car, with relatively few walking or taking the bus to their chosen centre.
 - In County Clare, respondents were more likely to be a car passenger than in other areas, particularly those in Zone 11. They were less likely to walk or take the bus.

Figure 2 - Mode of Transport to Main Non Bulky Comparison Goods Centre



- Journey times of respondents to non bulky comparison goods centres from respondents across all zones are set out in **Figure 3**.
- The largest proportion of respondents (18.1%) travelled for between six and ten minutes to their preferred non bulky comparison goods centre, followed by 11 to 15 minutes (17.6%) and 30 to 60 minutes (16.1%).
 - Only 3% of respondents travelled for more than an hour to their main centre of choice.
- Within Limerick City, the majority of respondents (40%) travelled for six to ten minutes to their preferred non bulky goods comparison centre.
- Residents of Limerick Country travelled further than those in Limerick City to their non bulky comparison goods centre of choice; 25% of respondents cited that they travelled for between 30 to 60 minutes and 17.8% travelled for between 26 and 30 minutes.
- Respondents from County Clare travelled the furthest to purchase non bulky comparison goods; 23.6% travelled for between 30 and 60 minutes and 20.1% travelled for 26 to 30 minutes.

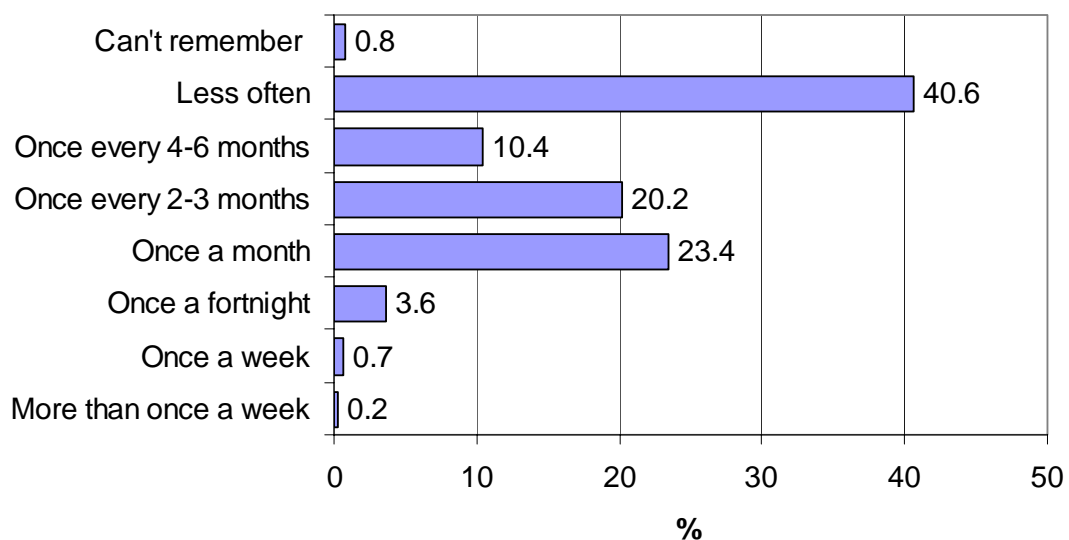
Figure 3 - Journey Time to Main Non Bulky Comparison Goods Centre



Bulky Comparison Goods Shopping

- When respondents were asked what their main bulky comparison goods shopping centre was, the largest proportion (17.95%) said that they did not have a main centre, with respondents from County Clare exhibiting the least loyalty to a specific centre.
 - Limerick City Centre was the most popular (specified) destination for bulky comparison goods shopping, with 14.8% of respondents citing this as their destination of choice. Around one quarter of respondents in Limerick County chose this destination.
 - When questioned, 8.8% of respondents stated that they did not have a bulky comparison goods centre of choice or that they did not shop for bulky comparison goods. Residents of County Clare were most likely to answer in this way.
 - Ennis (7.0%) and Childers Road Retail Park (6.0%) were the second and third most popular options for bulky comparison goods comparison shopping.
- The frequency with which respondents visited their main bulky comparison goods centre of choice is summarised in **Figure 4**. The majority of respondents (40.6%) visited their centre 'less than every six months', whilst 23.4% visited once a month and 20.2% visited once every 2 to 3 months.
 - Residents of Limerick City were most likely to visit main bulky comparison goods centre once every 2 to 3 months (38.9%), with an additional 31.5% visiting once a month. Respondents from Limerick County frequented their main bulky comparison goods centre slightly more often, with 32.2% visiting once a month.
 - However, respondents from County Clare were least likely to visit their main bulky comparison goods centre frequently, with the majority (66.2%) visiting 'less than every six months'. Only 12.5% frequented their chosen centre once a month.

Figure 4 - Frequency of Using Main Bulky Comparison Goods Centre



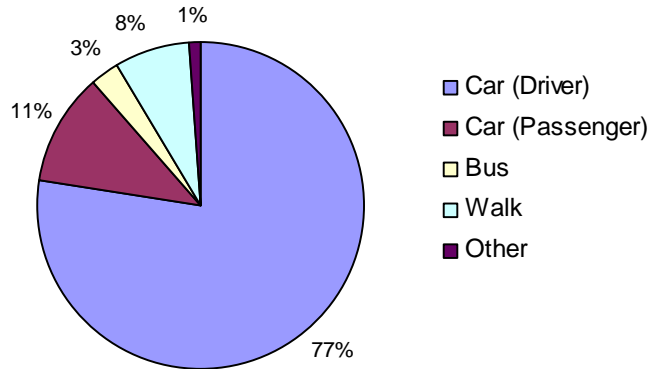
- The top five reasons given by respondents to the survey for choosing a main bulky comparison goods centre are set out in **Table 2**. Convenience and being close to home was overwhelmingly cited as the main reason, given by 76.9% of respondents. Almost all of respondents in Limerick City cited this as their reason for choosing a bulky comparison goods centre.
 - The range of shops was the second most popular reason given for choosing a bulky comparison goods centre (15.6%), with residents in County Clare citing this as most important. (35.4%).
 - Value for money and 'no reason' were given equal weighting, as the main reasons for choosing a bulky comparison goods centre (1.3% of respondents each). For residents in Zones 6 and 7, value for money was a key concern when choosing their shopping centre.

Table 2 – Reason for Choosing Main Bulky Comparison Goods Centre

	Convenient	Range of Shops	Other	Good Prices	No Reason
Average	76.9%	15.6%	2.1%	1.3%	1.3%
Zone 1	100%	0%	0%	0%	0%
Zone 2	100%	0%	0%	0%	0%
Zone 3	98.2%	0%	0%	0%	1.8%
Zone 4	100%	0%	0%	0%	0%
Zone 5	98.4%	0%	0%	0%	1.6%
Zone 6	52.8%	24.5%	9.4%	5.7%	0%
Zone 7	57.7%	19.2%	3.8%	3.8%	1.9%
Zone 8	45.9%	40.5%	0%	0%	8.1%
Zone 9	50.0%	50.0%	0%	0%	0%
Zone 10	63.6%	31.8%	2.3%	2.3%	0%
Zone 11	58.5%	24.4%	9.8%	2.4%	0%

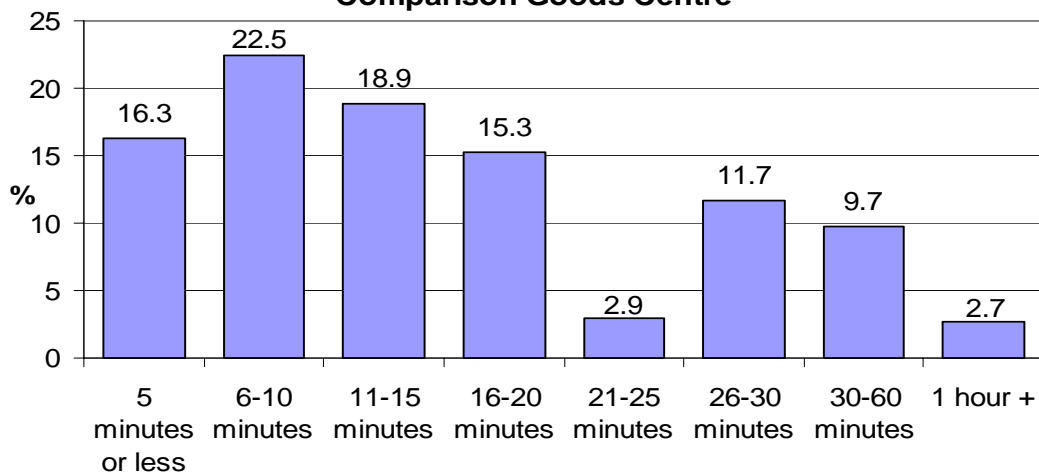
- **Figure 5** summarises the modes of transport used by respondents to travel to their main bulky comparison goods centre of choice. The most popular option was to drive one's own car (77.5%), followed by being a passenger in a car (11%). Travelling by bus or using other modes of transport (by taxi, cycling or train) accounted for a very small proportion of trips.
 - Respondents from Limerick City were most likely to drive their own car (68.7%), although a larger than average proportion of respondents walk to the shops (16.2%).
 - The majority of respondents in Limerick County drove (85.7%), whilst 4.5% took the local bus. No respondents used other forms of transport, such as taxis, cycles or trains. Shoppers from County Clare usually drove their car (77.6%).

Figure 5 - Mode of Transport to Main Bulky Comparison Goods Centre



- The average journey times to main bulky comparison goods centres for respondents are shown in **Figure 6**. Overall, 22.5% travelled for between six and ten minutes, whilst 18.9% travelled for between 11 and 15 minutes. Only 2.7% travelled for more than an hour to their preferred bulky comparison goods centre.
 - The majority of respondents from within Limerick City travelled for between 6 and 10 minutes (43.1%), with a quarter of residents travelling for between 11 and 15 minutes.
 - Respondents from Limerick County travelled for slightly longer to their main bulky goods centre, with 20.1% having journey times of 16 to 20 minutes, 13.9% for 26 to 30 minutes and 12.8% for 30 to 60 minutes.
 - Almost 5% of residents from County Clare travelled for more than an hour to their bulky comparison goods centre of choice, with the average journey time being between 21 and 25 minutes.

Figure 6 - Average Journey Time to Main Bulky Comparison Goods Centre



RETAIL STRATEGY FOR THE MID WEST REGION 2010-2016

APPENDIX 3E

**Summary of Market Share Data
by Centre and Zone**

NON BULKY COMPARISON GOODS CENTRE MARKET SHARES BY ZONE (COLUMN PERCENT)												
Centre	Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Zone 1												
Limerick - Jetland Shopping Centre, Cahardavin	1	22.4%	1.3%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Ennis Road Retail Park	1	3.2%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	25.6%	1.3%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2												
Limerick - Parkway Shopping Centre	2	2.5%	10.4%	5.9%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Parkway Retail Park	2	0.6%	0.4%	0.0%	1.5%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Other	2	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops	2	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Arthur's Quay Shopping Centre	2	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	3.1%	15.2%	5.9%	1.5%	0.0%	2.8%	1.2%	0.0%	0.0%	0.0%	0.0%
Zone 3												
Limerick - City Centre	3	59.6%	56.7%	59.6%	76.9%	40.4%	15.4%	50.1%	6.1%	8.3%	9.2%	6.2%
Limerick - Childers Road Retail Park	3	1.9%	11.3%	5.3%	3.0%	0.0%	4.5%	1.9%	1.0%	0.0%	0.0%	0.0%
Limerick - Roxborough Shopping Centre	3	0.0%	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	61.5%	67.9%	69.3%	79.9%	40.4%	19.9%	52.0%	7.1%	8.3%	9.2%	6.2%
Zone 4												
Limerick - Crescent Shopping Centre, Dooradoyle	4	6.2%	10.5%	17.2%	15.7%	13.4%	38.8%	13.0%	11.6%	8.2%	10.9%	11.5%
Limerick - City East Retail Park, Ballysimon	4	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Eastway Retail Park, Ballysimon	4	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%
Adare	4	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Raheen Retail Centre (Four Homes)	4	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - East Point Retail Park, Ballysimon	4	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops	4	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	6.2%	10.5%	19.0%	17.2%	16.5%	38.8%	13.4%	11.6%	8.2%	10.9%	11.5%
Zone 5												
Newcastle West	5	1.0%	0.0%	0.0%	0.0%	18.5%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Abbeyfeale	5	0.0%	0.0%	0.0%	0.0%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops	5	0.0%	0.0%	0.0%	0.0%	4.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	1.0%	0.0%	0.0%	0.0%	26.1%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 6												
Killmallock	6	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops	6	0.0%	0.0%	0.0%	0.0%	0.0%	10.3%	0.0%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	0.0%	0.0%	0.0%	0.0%	0.0%	11.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 7												
Scarriff	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.6%	0.0%	0.0%	0.0%	0.0%
Shannon - Town centre	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	0.0%	0.0%	0.0%	0.0%
Shannon - Sky Court	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%
Quin	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%
Shannon - Other	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%
Fealde	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%
Local shops	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	12.3%	4.1%	0.0%	0.0%	0.0%
Zone 8												
Ennis	8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	15.7%	62.2%	72.2%	0.0%	0.0%
Kilrush	8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%
Clarecastle	8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%
Local shops	8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.1%	0.0%	0.0%	0.0%
SUBTOTAL	-	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	15.7%	70.4%	72.8%	0.0%	0.0%
Zone 9												
Ennistymon	9	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	1.0%	0.0%	0.0%
SUBTOTAL	-	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	1.0%	0.0%	0.0%
Zone 10												
Birdhill	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%
Nenagh	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	43.2%	0.0%
Thurles	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	20.0%	10.3%
Templemore	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.2%	0.6%
SUBTOTAL	-	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	69.4%	10.9%
Zone 11												
Tipperary	11	0.0%	0.0%	0.0%	0.0%	0.0%	3.7%	0.0%	0.0%	0.0%	0.0%	31.1%
Cashmel	11	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	1.9%
SUBTOTAL	-	0.0%	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%	0.0%	0.0%	0.0%	33.0%
Out of Study Area												
Dublin - City Centre	-	2.1%	0.5%	0.0%	1.5%	0.0%	3.8%	0.8%	4.1%	0.0%	0.0%	0.0%
Cork - City Centre	-	0.6%	0.5%	2.7%	0.0%	1.5%	3.4%	0.0%	0.0%	0.0%	1.9%	2.9%
Galway - City Centre	-	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.8%	0.6%	5.8%	0.0%	0.0%
Trallee	-	0.0%	0.0%	0.0%	0.0%	13.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Clonmel	-	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	32.4%
Claresville	-	0.0%	0.0%	0.0%	0.0%	0.0%	8.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Mitchellstown	-	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Kilkenny	-	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	0.0%
Athlone	-	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%
Other	-	0.0%	4.1%	0.5%	0.0%	1.5%	2.8%	1.5%	0.0%	3.9%	4.7%	3.1%
SUBTOTAL	-	2.7%	5.1%	3.3%	1.5%	16.9%	21.7%	3.1%	4.7%	9.7%	10.4%	38.4%
TOTAL												
	-	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

CONVENIENCE GOODS CENTRE MARKET SHARES BY ZONE (COLUMN PERCENT)												
Centre	Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Zone 1												
Limerick - Dunnes Stores, Jetland, Ennis Road	1	67.3%	1.3%	2.2%	0.8%	0.0%	2.1%	23.7%	0.0%	0.0%	0.0%	0.0%
Limerick - Lidl, Ennis Road	1	11.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Supervalu, Watchouse Cross	1	1.0%	0.5%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Tesco, Coonagh Cross, Ennis Road	1	7.2%	0.7%	4.4%	1.6%	0.0%	1.0%	13.9%	0.0%	0.0%	0.0%	0.0%
Limerick - Other	1	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops / Post Office / Corner shop	1	3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	90.4%	2.5%	8.0%	2.4%	0.0%	3.1%	37.6%	0.0%	0.0%	0.0%	0.0%
Zone 2												
Limerick - Aldi, Parkpoint, Dublin Road	2	1.3%	5.4%	0.7%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Dunnes Stores, Parkway	2	2.5%	40.9%	10.1%	6.3%	0.0%	3.3%	4.3%	0.0%	0.0%	0.0%	0.0%
Roxborough - Tesco	2	0.0%	1.2%	14.7%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Other	2	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops / Post Office / Corner shop	2	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	3.8%	50.1%	25.4%	7.1%	0.0%	3.3%	4.3%	0.0%	0.0%	0.0%	0.0%
Zone 3												
Limerick - Centra (Any)	3	1.1%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Costcutter (Any)	3	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Tesco, Arthur's Quay, City Centre	2	0.0%	10.9%	6.2%	3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Aldi, Childers Road	3	0.7%	0.6%	4.5%	5.3%	0.4%	1.0%	2.1%	0.0%	0.0%	0.0%	0.0%
Limerick - Dunnes Stores, Childers Road Retail Park	3	1.6%	13.0%	18.7%	15.5%	2.4%	2.4%	1.1%	0.0%	0.0%	0.0%	0.0%
Limerick - Dunnes Stores, Harveys Quay, Henry Street, City Centre	3	0.9%	4.1%	12.3%	0.8%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Lidl, Childers Road	3	0.0%	0.9%	3.6%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops / Post Office / Corner shop	3	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	4.3%	29.4%	49.3%	26.7%	2.8%	4.1%	3.2%	0.0%	0.0%	0.0%	0.0%
Zone 4												
Limerick - Lidl, Castletroy	4	0.0%	0.0%	0.0%	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Superquinn, Castletroy Shopping Centre	4	0.9%	2.3%	0.5%	18.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dooradoyle - Tesco, Crescent Shopping Centre	4	0.0%	0.3%	14.6%	28.9%	1.3%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%
Askeaton - Supervalu	4	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Other	4	0.0%	0.0%	0.0%	0.0%	0.0%	6.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops / Post Office / Corner shop	4	0.0%	0.0%	0.0%	10.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	0.9%	2.6%	15.1%	61.7%	3.9%	6.6%	0.0%	0.0%	0.6%	0.0%	0.0%
Zone 5												
Abbeyfeale - Dunnes Stores	5	0.0%	0.0%	2.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Abbeyfeale - Supervalu	5	0.0%	0.0%	0.0%	0.0%	7.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Abbeyfeale - Tesco	5	0.0%	0.0%	0.0%	0.0%	14.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newcastle West - Supervalu	5	0.0%	0.0%	0.0%	0.0%	11.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newcastle West - Lidl	5	0.0%	0.0%	0.0%	0.0%	10.5%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Newcastle West - Tesco	5	0.0%	0.0%	0.0%	0.0%	27.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Glin(any)	5	0.0%	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops / Post Office / Corner shop	5	0.0%	0.0%	0.0%	0.0%	12.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	0.0%	0.0%	2.0%	0.0%	88.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 6												
Killmallock - Supervalu	6	0.0%	0.0%	0.0%	0.0%	0.0%	11.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Killmallock - Other	6	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Bruff - Eurospar	6	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops / Post Office / Corner shop	6	0.0%	0.0%	0.0%	0.0%	0.0%	33.1%	0.0%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	0.0%	0.0%	0.0%	0.0%	0.0%	47.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 7												
Killaloe - Supervalu	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%	0.0%	0.0%	0.0%
Scarriff (Any)	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%
Shannon - Dunnes Stores, Sky Court	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	16.0%	0.0%	0.0%	0.0%	0.0%
Shannon - Lidl	7	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	1.4%	0.0%	0.0%	0.0%	0.0%
Killaloe - Other	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%
Sixmilebridge (Any)	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%
Local shops / Post Office / Corner shop	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.0%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	37.1%	0.0%	0.0%	0.0%	0.0%
Zone 8												
Corbally - Supervalu	8	0.0%	11.7%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%
Corbally - Tesco Express	8	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ennis - Aldi, Francis Street	8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	6.7%	8.6%	0.0%	0.0%
Ennis - Dunnes Stores, Clon Road	8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	24.1%	23.5%	0.0%	0.0%
Ennis - Lidl, Gort Road	8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	2.2%	3.3%	0.0%	0.0%
Ennis - Tesco, Ennis Shopping Centre	8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	52.1%	22.4%	0.0%	0.0%
Killrush - Supervalu	8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%
Ennis - Other	8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	1.3%	0.0%	0.0%	0.0%
Milltown - Londis	8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	0.0%	13.7%	0.0%	0.0%	0.0%	0.0%	12.5%	96.4%	57.9%	0.0%	0.0%
Zone 9												
Ennistymon - Supervalu	9	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	32.9%	0.0%	0.0%
Carofin - Europa	9	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.0%
Local shops / Post Office / Corner shop	9	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%
SUBTOTAL	-	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	35.9%	0.0%	0.0%
Zone 10												
Nenagh - Dunnes Stores	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	16.8%	0.0%
Nenagh - Lidl	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%
Nenagh - Supervalu	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%
Nenagh - Tesco	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	15.3%	0.0%
Thurles - Dunnes Stores	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	16.4%	1.9%
Thurles - tesco	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.0%	1.5%
Nenagh - Other	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	17.0%	0.0%
Thurles - Other	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.7%	3.9%
Templemore - Centra	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%
Templemore - Lidl	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%	0.0%
Templemore - Spar	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%
Local shops / Post Office / Corner shop	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%
SUBTOTAL	-	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	98.8%	7.3%
Zone 11												
Tipperary - Lidl	11	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	9.4%
Tipperary - Dunnes Stores	11	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%	0.0%	0.0%	0.0%	0.0%	11.2%
Tipperary - Supervalu	11	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	17.9%
Tipperary - Other	11	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	7.5%
Cahir - Spar	11	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%
Cashel - Lidl	11	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Cashel -Supervalu	11	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.1%
Cashel -Tesco	11	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.7%
Dundrum - Centra	11	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
SUBTOTAL	-	0.0%	0.0%	0.0%	0.0%	0.0%	7.3%	0.0%	0.0%	0.0%	0.0%	69.0%
Outside of Study Area												
Charleville - Dunnes Stores	-	0.0%	0.0%	0.0%	0.0%	2.2%	4.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Charleville - Lidl	-	0.0%	0.0%	0.0%	0.0%	0.7%	5.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Charleville - Other	-	0.0%	0.0%	0.0%	0.0%	0.0%	10.3%	1.8%	0.0%	0.0%	0.0%	0.0%
Charleville - Lidl	-	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Charleville - Tesco	-	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Clonmel - Dunnes Stores, Davis Road	-	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.2%
Clonmel - Dunnes Stores, Oakville	-	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.8%
Clonmel - Superquinn	-	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.4%
Clonmel - Supervalu	-	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%
Clonmel - Tesco, Powerstone Centre	-	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.7%
Mitchelstown - Tesco	-	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Mitchelstown - Supervalu	-	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tralee - Dunnes	-	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	-	0.6%	1.8%	0.1%	2.0%	0.0%	0.0%	3.5%	0.4%	5.6%	1.2%	2.7%
SUBTOTAL	-	0.6%	1.8%	0.1%	2.0%	5.3%	25.3%	5.3%	0.4%	5.6%	1.2%	23.7%
TOTAL	-	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

BULKY COMPARISON GOODS CENTRE MARKET SHARES BY ZONE (COLUMN PERCENT)												
Centre	Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Zone 1												
Limerick - Ennis Road Retail Park	1	45.9%	2.5%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Jetland Shopping Centre, Caherdavin	1	16.3%	0.0%	0.0%	0.0%	0.0%	0.0%	4.4%	0.0%	0.0%	0.0%	0.0%
Local shops	1	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	63.8%	2.5%	0.0%	0.0%	0.0%	0.0%	6.4%	0.0%	0.0%	0.0%	0.0%
Zone 2												
Limerick - Parkway Shopping Centre	2	0.0%	0.0%	1.8%	1.8%	0.0%	1.5%	0.5%	0.0%	0.0%	2.3%	0.0%
Limerick - Parkway Retail Park	2	4.5%	14.6%	8.6%	3.6%	0.0%	3.6%	2.0%	0.0%	1.1%	0.0%	0.0%
SUBTOTAL	-	4.5%	14.6%	10.5%	5.4%	0.0%	5.1%	2.4%	0.0%	1.1%	2.3%	0.0%
Zone 3												
Limerick - City Centre	3	20.3%	18.0%	37.1%	57.1%	24.2%	17.4%	21.9%	2.7%	1.1%	4.6%	2.4%
Limerick - Childers Road Retail Park	3	2.1%	43.8%	20.6%	10.7%	0.0%	7.8%	14.9%	8.1%	0.0%	0.0%	2.4%
Limerick - Dock Road Retail Park	3	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	23.5%	61.8%	57.6%	67.9%	24.2%	25.3%	36.8%	10.8%	1.1%	4.6%	4.9%
Zone 4												
Limerick - Castletroy Shopping Centre	4	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Delta Retail Park, Ballysimon	4	0.0%	0.0%	0.0%	3.6%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%
Limerick - East Point Retail Park, Ballysimon	4	0.0%	0.0%	0.0%	3.6%	1.6%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%
Limerick - City East Retail Park, Ballysimon	4	1.1%	0.0%	1.8%	5.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Eastway Retail Park, Ballysimon	4	3.8%	21.1%	23.9%	7.1%	0.0%	7.3%	6.8%	0.0%	0.0%	0.0%	0.0%
Limerick - Crescent Shopping Centre, Dooradoyle	4	1.6%	0.0%	3.7%	3.6%	4.8%	2.4%	1.7%	1.4%	5.5%	1.2%	7.3%
Limerick - City East Retail Park, Ballysimon	4	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%	0.0%	0.0%	0.0%	0.0%
Limerick - Raheen Retail Centre (Four Homes)	4	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops	4	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	6.6%	21.1%	31.9%	26.8%	6.5%	9.7%	15.2%	1.4%	5.5%	1.2%	7.3%
Zone 5												
Abbeyfeale	5	0.0%	0.0%	0.0%	0.0%	6.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newcastle West	5	0.0%	0.0%	0.0%	0.0%	40.3%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Shanagolden	5	0.0%	0.0%	0.0%	0.0%	9.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	0.0%	0.0%	0.0%	0.0%	56.5%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 6												
Kilmallock	6	0.0%	0.0%	0.0%	0.0%	0.0%	16.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops	6	0.0%	0.0%	0.0%	0.0%	0.0%	11.9%	0.0%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	0.0%	0.0%	0.0%	0.0%	0.0%	28.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 7												
Feakle	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%
Scariff	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.9%	0.0%	0.0%	0.0%	0.0%
Shannon - Town centre	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.8%	0.0%	0.0%	0.0%	0.0%
Shannon - Sky Court	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%
Quin	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%
Shannon - Other	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.7%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	23.3%	2.7%	0.0%	0.0%	0.0%
Zone 8												

RETAIL STRATEGY FOR THE

MID WEST REGION

2010-2016

APPENDIX 4

Technical Data

RETAIL STRATEGY FOR THE MID WEST REGION 2010-2016

APPENDIX 4A

Population Estimates and Projections

REVIEW OF MID WEST RETAIL STRATEGY

Quantitative Retail Floorspace Need Assessment

Population Estimates and Projections

1. The quantitative need for additional retail floorspace is generated largely by the growth in available consumer retail expenditure. Expenditure growth is driven by two factors:-
 - the growth in consumer retail spend per head; and
 - increases in population.
2. Clearly, therefore, in order for any quantitative assessment of retail need to be as robust as possible, it is important to incorporate into the analysis the best available population estimates and projections.
3. In preparing the Review of the Mid West Retail Strategy, population figures are required for each of the household survey zones (see **Figure 4.1** in main report) for the base year of 2009 and the agreed forecast years of 2016 and 2022. These population estimates and projections have been derived from two sources:-
 - Limerick City Council - for zones within the Mid West Region; and
 - CSO - for zone 11 outside of the Mid West Region.
4. Limerick City Council has prepared population estimates and projections for zones 1 to 10 within the Mid West Region – these are based on DEHLG Regional Population Targets (the lower target for 2022). The zones may be amalgamated to form County areas as follows:-
 - Limerick City – zones 1, 2 and 3
 - Limerick County – zones 4, 5 and 6

- Clare County – zones 7, 8 and 9
- North Tipperary – zone 10

5. The City Council's population projections for 2009 (the base year) and the agreed forecast years of 2016 and 2022 are set out in the table below:-

Zone	Base year 2009	Forecast Years	
		2016	2022
1	21,836	26,652	30,779
2	20,909	24,797	28,129
3	19,365	24,034	28,035
4	70,341	79,577	87,494
5	36,887	40,208	43,055
6	20,821	22,465	23,873
7	46,016	49,864	53,162
8	56,444	64,873	72,099
9	12,796	14,188	15,381
10	68,585	75,121	80,723
Total	374,000	421,779	462,732

6. The zone population projections are based on current targets for the Mid West which have been agreed with senior planners at each of the Councils. The total population projected for 2022 is the same as the projection published by DEHLG, whilst the 2016 total is 5,421 (or 1.27%) lower.
7. Zone 11 covers part of South Tipperary County and is therefore outside of the Mid West Region. It in fact falls within the South East Region. This zone formed part of the household survey area, since it contributes material amounts of in-flow spend to the Mid West.
8. Using published CSO population data at ED level, the 2006 population for zone 11 (which is made up of a group of EDs) is 43,759. This is projected forwards to 2009 (the base year) and the forecast years of 2016 and 2022 by adopting population projections for the South East Region as a whole.

9. CSO publish a range of alternative population projections at the regional level. However, CSO focus on the M2F1 Traditional Variant, which combines continuing though declining international migration with constant fertility and a return to the traditional pattern of internal migration by 2016. Applying this projection to the South East Region, gives the following rates of regional population growth:-

- 2006-11 +10.4%
- 2011-16 + 7.3%
- 2016-21 + 5.1%
- 2021-26 + 3.0%

10. These regional growth rates are applied to the 2006 population for zone 11 within South Tipperary County. To estimate figures for 2009 (the base year) and the forecast year of 2022, straight-line population growth between 2006-11 and 2021-2026 respectively has been assumed.

11. The estimated population projections for zone 11 are therefore as follows:-

Year		Population	Population Increase from 2006 (%)
2006	(-)	43,759	-
2009	(base year)	46,472	6.2
2016	(forecast year)	51,811	18.4
2022	(forecast year)	54,786	25.2

RETAIL STRATEGY FOR THE MID WEST REGION 2010-2016

APPENDIX 4B

**Resident Consumer Retail Expenditure Per
Head and Expenditure Growth Forecasts**



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**Prospects for Retail Goods
Expenditure in Ireland**

Prospects for Retail Goods Expenditure in Ireland

March 2009

Oxford Economics

Abbey House
121 St Aldates
Oxford, UK
OX1 1HB

107-111 Fleet Street
London
EC4A 2AB

Regional Forecasts Ltd
Lagan House
Sackville Street
Lisburn
BT27 4AB

nblake@oxfordeconomics.com

March 2009



OXFORD ECONOMICS



Contents

Introduction and Summary	1
Macroeconomic Background.....	2
Spending on Retail Goods in Ireland	4
Sources & Definitions	4
Spending Levels in 2007	6
Historical and Future Trends.....	7
Bulky and Non-Bulky Comparison Goods.....	8
Implications for the Mid-West.....	9
Data Appendices	12



Introduction and Summary

- This document looks at historical and forecast trends in real (i.e. inflation adjusted) consumer spending per person on retail goods in Ireland as a whole and also gives some consideration to what spending levels are likely to be in the Mid-West NUTS 3 region.
- This is set against a macroeconomic background of a steep recession in Ireland. When the Irish economy does eventually emerge from recession, consumer spending growth is expected to be much weaker than over the past fifteen years or so.
- A marked slowdown in spending on retail goods is also expected but it is likely to be less severe than the slowdown in overall consumer spending.
- Average annual growth in total, convenience and comparison goods spend per head in Ireland between 2009 and 2020 is forecast to be 3.2, 1.0 and 4.8% p.a. respectively. These growth rates compare favourably to the equivalent UK growth rates of 2.4, 0.5 and 3.4% p.a. respectively although the Ireland-UK growth gap will be substantially less than in the pre-recession period.
- Although Irish consumer spending per head in 2007 was higher than in the UK, retail goods spending was higher in the UK. Convenience spending per head was at much the same level, with the big difference being in comparison goods spend.
- Convenience spending and comparison spending per head in the Mid-West are estimated to be 1.4 and 7.4% lower respectively than the average for Ireland as a whole.
- The impact of the recession is expected to be less severe in the Mid-West than in some other parts of Ireland although there will still be a severe down turn. Spending in the Mid-West will also grow less rapidly than the economy as a whole in the economy's recovery period 2011-13.



Macroeconomic Background

The consumer boom comes to an end

The Irish economy is in the grip of its worst recession in well over a generation. Ireland was the first Eurozone economy to enter recession, with real GDP falling in both Q1 and Q2 last year and again in 2008Q4. The end of the housing boom, a rapid slowdown in credit growth and a weaker world economy all suggest that the economy is likely to experience a painful and prolonged recession, with the risks still skewed to the downside. We expect a 4.2% fall in GDP this year, before a modest recovery in 2010.

The forecasts in this report are based on data available at end-February 2009 and do not include the 2008 Q4 National Accounts estimates released on 26th March which showed a steeper than expected fall in GDP in the fourth quarter. The outturn for real consumer spending and GNP were, however, broadly in line with our forecasts and we see no reason at present to revise our medium-long term outlook for Irish consumer spending.

Many of the factors which underpin consumer demand have continued to deteriorate. The number of people claiming unemployment benefit jumped to 352,800 in February 2009 – the highest since records began in 1967. This pushed up the Live Register unemployment rate to 10.4% from 9.6% in January while the ILO measure recorded an unemployment rate of 7.7% in Q4 2008. We expect the upward trend to continue and forecast that unemployment will average 10.5% this year. Despite falling energy prices and lower interest rates, consumer confidence dropped close to the series low in February according to the KBC Ireland/ESRI survey while house prices have continued to fall sharply. And while consumers will benefit from lower prices, we expect the boost to consumer spending to be marginal. Current conditions will continue to take their toll on consumption and we forecast a 3.2% contraction in consumer spending in 2009 before growth picks up to 0.8% next year.

The recovery will be slow...

Just as the rise of the Celtic Tiger had been rapid and robust, its demise has been swift and severe. Annual GDP growth between 1995 and 2007 averaged 7.3%, but between 2009 and 2020, growth is expected average just 3.6% per annum. The respective GNP growth rates are 6.4% and 3.3%. Any recovery will be slow and fragile in the short run. At the same time, employment growth will also moderate, from an average of 4.1% per year between 1995 and 2007 to just 1.3% over the next twelve years.

While the Irish economy as a whole has performed exceptionally well in the past decade, consumer spending growth has been equally impressive – averaging 6.4% each year between 1995 and 2007. However, with house prices still falling, consumer confidence low and unemployment on the rise, households will be re-building their balance sheets, and therefore will rein in their expenditure. Our forecast is for consumer spending growth to therefore average just 3.3% between 2009 and 2020.

While consumer spending has been an important driver of growth in the Irish economy over recent years, its



share of GNP has been broadly flat between 1995 and 2007, and we expect this trend to continue over the forecast horizon. However, growth in consumption per capita is expected to moderate sharply from an annual average of 4.7% between 1995 and 2007 to 2.3% over the next twelve years – there will be no return to the consumer boom in the medium term.

...but Ireland compares favourably to the UK

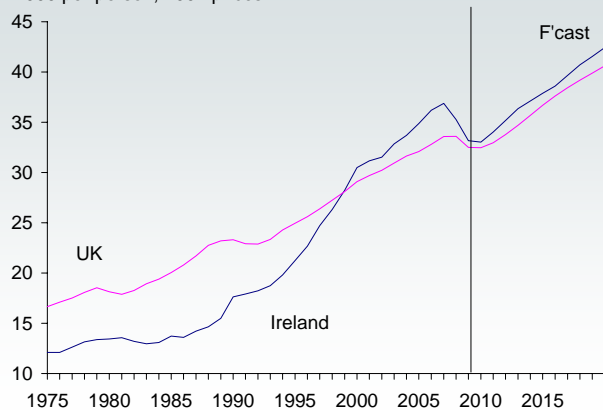
Historically, the UK has been more prosperous than Ireland, with GDP per capita in the UK on average being 33% higher than that GNP in Ireland between 1975 and 1999 (we have used GNP in Ireland as the comparator for GDP in the UK as the high level of foreign ownership of Irish industry and the consequent high outflows of profits makes GDP less relevant for consumer analysis purposes). However, in 2000, driven by a vigorous increase in labour productivity between 1985 and 2007 of 3.4% per year compared with just 1.9% in the UK, Irish GDP per head overtook that of the UK, and by 2007 it was almost 10% greater at €36,900 compared with €33,600 (all measured in constant 2007 prices and exchange rates).

But as Ireland's economy suffers a deeper recession, the gap in GNP/GDP per head between the two countries will almost disappear in 2010. Nevertheless, as productivity growth in Ireland is expected to outstrip the UK's over the forecast period, albeit more modestly than in the past, Ireland will re-open the gap in the future.

Similarly, Irish consumer spending per capita has caught up with that of the UK despite faster population growth in Ireland. Although the difference in spending per head had remained relatively constant between 1975 and the mid-1990s – UK consumption per capita was around 30% higher than in Ireland – the gap began to narrow in the early 1990s, closing in 2006. The slightly deeper consumer retrenchment in Ireland will cause UK spending per head to exceed Ireland's in the short run; however, after 2011 it will be broadly equal in both countries.

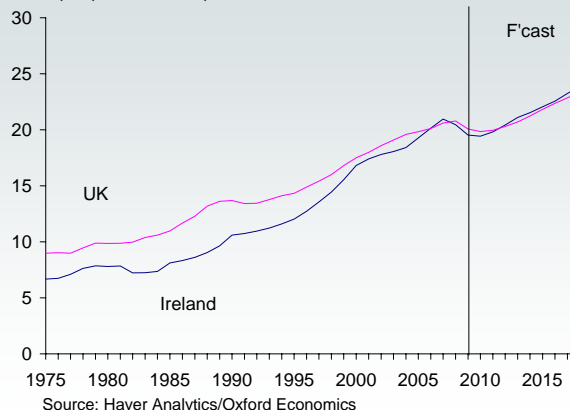
GDP/GNP per head

€000 per person, 2007 prices



Consumer spending per head

€000 per person, 2007 prices



Spending on Retail Goods in Ireland

Sources & Definitions

The analysis of spending on retail goods used in this paper is based on detailed consumer spending data analysed by purpose of consumption (COICOPS) and supplied by Eurostat. The data are available in current and constant (2000) prices and cover all spending by Irish residents from all retail outlets including the internet and other special forms of trading and is inclusive of VAT. The data presented here has been manipulated so that it is constant (2007) prices (euros).

A number of adjustments were made to correct for anomalies in the Eurostat volume data on spending on "Medical Products" and "Personal Care Goods".¹ In addition, the Eurostat data were not detailed enough to identify some of the spending categories required. These were:

1. The breakdown of COICOPS 4.3 "Repair and Maintenance of the Dwelling" into spending on goods and services individually.
2. The breakdown of COICOPS 5.6 "Goods and services for routine household maintenance" into spending on goods and services individually.
3. The breakdown of COICOPS 9.5 "Newspapers, books and stationery" to split Newspapers out from books and stationary.
4. The breakdown of COICOPS 12.1 "Personal care" into spending on goods and services individually.

This breakdown was produced using data from the Irish Household Budget Survey 2004-5² with earlier and subsequent trends in shares being based on UK data.

Categories

The spending data were categorised as follows:

Convenience Goods:

COICOPS 1.0	Food and non-alcoholic beverages
COICOPS 2.1	Alcoholic beverages
COICOPS 2.2	Tobacco
COICOPS 5.6.1	Non-Durable HH Goods

¹ The Eurostat data on Medical Products shows an implausible large (84%) fall in 1995 and the data on Personal Care prices shows an implausibly high rate of inflation of 22% per annum between 2000 and 2007 (compared to 0.8% p.a. for the UK).

² <http://www.cso.ie/releasespublications/documents/housing/hbsfinal/webcomplete.pdf>



Convenience Goods continued

COICOPS 9.5.2 Newspapers

Non-Bulky Comparison Goods:

COICOPS 3.0 Clothing and footwear

COICOPS 5.2 Household textiles

COICOPS 5.4 Glassware, tableware and household utensils

COICOPS 6.1 Medical products, appliances and equipment

COICOPS 9.5.1 Books & Stationary

COICOPS 9.3 Other recreational items and equipment, gardens and pets

COICOPS 12.1.2 + 12.1.2 Personal Care Products

COICOPS 12.3 Personal effects n.e.c.

Bulky Comparison Goods

COICOPS 4.3.1 Repair & Maintenance materials

COICOPS 5.1 Furniture and furnishings, carpets and other floor coverings

COICOPS 5.3 Household appliances

COICOPS 5.5 Tools and equipment for house and garden

COICOPS 9.1 Audio-visual, photographic and information processing equipment

COICOPS 9.2 Other major durables for recreation and culture



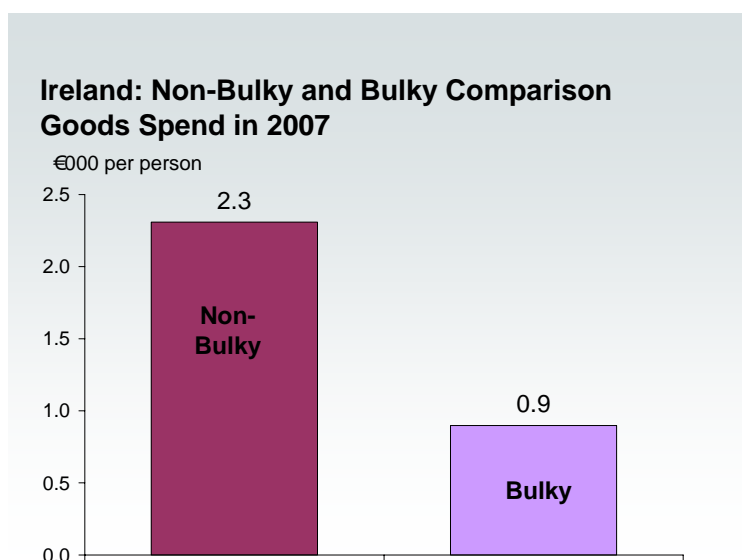
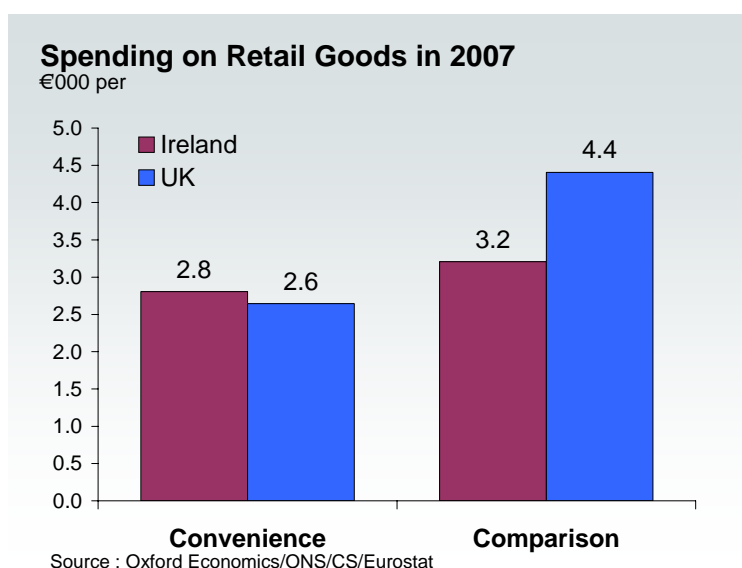


Spending Levels in 2007

Although total consumer spending per head in the Republic of Ireland exceeded that for the UK in 2007, the reverse was true for retail goods. As the chart shows, although convenience spend per person was marginally higher in Ireland than in the UK, Irish comparison spending per head was considerably below the UK level.

Examination of broad Irish consumer spending trends shows that a considerably bigger share of the total is accounted for by COICOPS Group 11 Hotels and Restaurants than in the UK (15.0 c.f. 10.7%) and significantly less is spent on COICOPS Group 9 Recreation and Culture (7.1 c.f. 11.6%). The latter includes a number of retail goods categories.

Within the comparison goods total in Ireland, the majority of spending was on non-bulky goods.





Historical and Future Trends

The tables below show past and future annual average growth rates for total consumer spending and retail goods spending per capita in the Republic of Ireland and the UK.

Average Annual Growth Rates of Real Spending per person*

Ireland

	Total Consumer Spending	of which:		
		Retail Goods	Convenience Goods	Comparison Goods
1990-2007	4.1	3.7	1.1	7.5
2007-2020	1.4	2.4	0.4	3.8
2009-20	2.3	3.2	1.0	4.8

* 2007 prices.

Note: Average annual forecast growth rates are not inclusive. e.g. 1990-07 is the growth rate from the 1990 level up to 2007.

Average Annual Growth Rates of Real Spending per Person*

UK

	Total Consumer Spending	of which:		
		Retail Goods	Convenience Goods	Comparison Goods
1990-2007	2.4	3.2	0.8	5.4
2007-2020	1.2	2.0	0.3	2.9
2009-20	1.7	2.4	0.5	3.4

* 2007 prices.

Note: Average annual forecast growth rates are not inclusive. e.g. 1990-07 is the growth rate from the 1990 level up to 2007.

The past growth rates of total consumer spending per head reflect the growth gap between Ireland and the UK referred to in the Macroeconomic Background section above. Between 1990 and 2007, Irish consumer spending growth per head, at 4.1% per annum, was far greater than the equivalent UK rate of 2.4%. The growth rate gap for convenience goods, however, was far less (1.1% c.f. 0.8%) which is what we would expect



for what are largely income inelastic³ goods but the growth rate of comparison goods spend per head was far higher (7.5% c.f. 5.4% in the UK). Again, this is what we would expect for comparison goods which tend to be income elastic goods.

Growth rates are expected to be much weaker in the future. The weaker growth between 2007 and 2020 reflects, in part, the impact of the current recession, where spending growth on all categories is expected to fall sharply. Beyond the 2009 contraction, however, growth rates are still likely to be subdued compared to the 1990-2007 experience. This is because spending growth in both countries is likely to be inhibited by weaker economic growth overall and by the impact of an unwinding of current high levels of household debt, or at least by an end to further increases in households' debt to income ratio.

Bulky and Non-Bulky Comparison Goods

Within the overall total of comparison goods, there have been marked differences in growth rates between what are classed as non-bulky and bulky comparison goods with spending bulky goods tending to grow at a slightly higher growth rate than that for non-bulky goods. Most, if not all, of this differential is due to the classification of COICOPS 9.1 "Audio-visual, photographic and information processing equipment" to bulky comparison goods. We expect this growth gap to persist into the future albeit with a lower growth differential.

Average Annual Growth Rates of Real Spending per person*

Ireland

	of which:		
	Comparison Goods	Non-bulky	bulky
1990-2007	7.5	7.2	8.3
2007-2020	3.8	3.6	4.1
2009-20	4.8	4.6	5.0

* 2007 prices.

Note: Average annual forecast growth rates are not inclusive. e.g. 1990-07 is the growth rate from the 1990 level up to 2007.

³ Goods where spending growth tends to increase by less than income growth.

Forecasts vs Projections

The future growth rates given above are the current (March 2009) Oxford Economics economic forecasts. They are based on an econometric model which relates retail goods spending by broad category as a share of total consumer spending to total consumer spending per head and relative prices. The key driver is the future growth of total consumer spending. This in turn is taken from the forecast produced using the Oxford Economics' Global Macro Model published in March 2009.

An alternative methodology often used in retail planning to simply use past growth rates of retail spending per head as an indicator of future trends. As the disaggregated Irish data only start in 1990 the "trend-based" projection is simply equal to the 1990-2007 growth rates given in the table above. We would, however, caution against this approach. Ireland went through a major growth spurt in this period and, for reasons outlined in the Macroeconomic background section, we believe that future growth are likely to be considerably weaker.

Implications for the Mid-West

No detailed consumer spending estimates exist below the Ireland level although there are income estimates at the NUTS 2 level which can be used to approximate retail spending shares. The Mid-West, however, is a NUTS 3 region (see the map in the Appendix) which along with Dublin and others is in the Southern and Eastern NUTS 2 region and as we expect the big difference to be between Dublin and the rest, having income data at the NUTS 2 level is only of limited use. We do have data on GDP per head at the NUTS 3 level and we know that income per head differentials tend to be less than GDP per head differentials because of the impact of the tax and benefit system. Consequently, to get an idea of how the Mid-West compares to Southern and Eastern Ireland as a whole, we have examined the relationship between income, GDP shares and population shares at the NUTS 2 level and have extrapolated this to NUTS 3 regions⁴. This approximation is then applied to the forecasts in Oxford Economics' *European Cities and Regions Service* to infer NUTS 3 differences in retail spending.

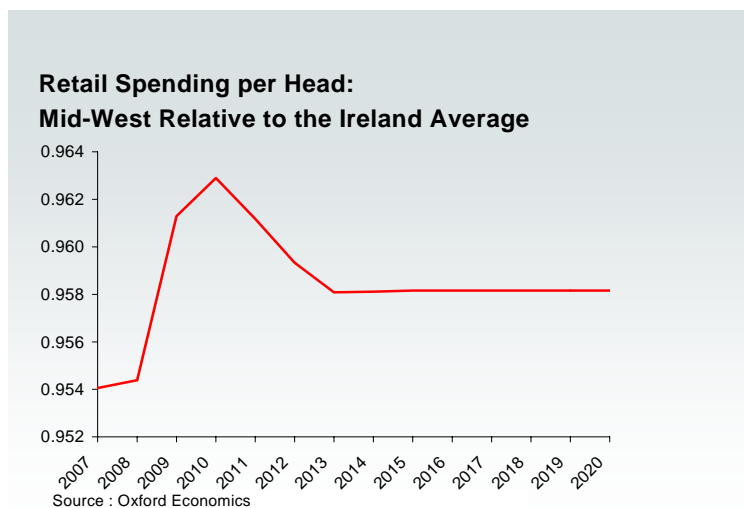
In 2007, these show lower (-4.6%) retail spending on retail goods per person in the Mid-West relative to Ireland as a whole. A substantial narrowing of the differential is expected in 2009 as the recession in Ireland impacts much more on the rest of the Southern and Eastern NUTS 2 region, particularly on Dublin, than it does on the Mid-West. From 2011, the differential is expected to open up again as the Irish economy comes out of recession before stabilising in 2013 at a level that is only marginally higher than that of 2007.

These estimates for the Mid-West relate to total retail spending. Experience shows that the differentials across regions (or countries) in convenience spend per head tend to be much less than the differentials for comparison and total spending on retail goods. The estimates for the Mid-West presented below assume that

⁴ The approximation actually used was that relative incomes and retail spending are equal to 1 plus 0.3 multiplied by relative GDP per head



the differential for convenience goods spend is only one third as big as that for total retail spend and the comparison goods differential is then calculated as a residual. These assumptions imply that convenience spending per head in the mid-West in 2007 was 1.4% lower than the Ireland in average and that comparison spend per head was 7.4% lower.



The following table summarises the estimates and forecasts for the Mid-West as well as giving the comparable figures for the Republic of Ireland as a whole.

Levels and Average Annual Growth Rates of Real Spending per Person*

	Retail Goods	Convenience Goods	Comparison Goods	of which:	
				Non-Bulky	Bulky
Spend per Head in 2007 (€pwer person)					
Mid-West	5737	2768	2969	2138	831
Ireland	6014	2807	3207	2309	898
2007-20					
Mid-West	2.4	0.4	3.9	3.8	4.2
Ireland	2.4	0.4	3.8	3.6	4.1
2009-20					
Mid-West	3.2	1.0	4.79	4.7	5.1
Ireland	3.2	1.0	4.75	4.6	5.0

* 2007 prices.

Note: Average annual forecast growth rates are not inclusive. e.g. 1990-07 is the growth rate from the 1990 level up to 2007.



Note that there is no difference in the forecast growth rates in convenience spending per head when the numbers are rounded to one decimal place. Comparison spending per head growth rates are marginally higher but the differences are very small. This reflects the re-opening on differential from 2013 as discussed above.



Data Appendices

Appendix 1: Retail Spending per Head in the Republic of Ireland

(€ per person)

Ireland						
	Total Consumer Spending	of which:				
		Retail Goods	Convenience Goods	Comparison Goods	Non-Bulky	Bulky
1990	10605	3264	2323	941	708	233
1991	10735	3318	2354	965	726	239
1992	10959	3339	2368	971	744	227
1993	11227	3383	2375	1008	759	249
1994	11604	3321	2268	1053	801	252
1995	12025	3354	2285	1069	802	268
1996	12730	3542	2359	1183	856	327
1997	13568	3720	2412	1308	956	352
1998	14441	3944	2459	1485	1101	384
1999	15548	4202	2529	1673	1240	433
2000	16814	4671	2671	2000	1517	483
2001	17397	4866	2682	2185	1621	564
2002	17807	4947	2708	2239	1647	592
2003	18062	4923	2588	2335	1692	643
2004	18422	5042	2585	2456	1760	696
2005	19283	5380	2678	2702	2005	698
2006	20151	5711	2785	2925	2131	794
2007	20963	6014	2807	3207	2309	898
2008	20454	5927	2726	3201	2296	905
2009	19528	5769	2655	3114	2232	882
2010	19439	5830	2673	3157	2265	892
2011	19814	6008	2718	3290	2358	932
2012	20432	6248	2768	3480	2489	990
2013	21101	6500	2809	3691	2636	1056
2014	21541	6692	2825	3867	2757	1110
2015	22055	6911	2850	4062	2892	1169
2016	22562	7132	2872	4260	3030	1230
2017	23251	7407	2906	4501	3197	1304
2018	23895	7672	2931	4741	3364	1378
2019	24421	7908	2947	4961	3516	1445
2020	24967	8155	2965	5190	3674	1515

Source: Oxford Economics/CSO/Eurostat

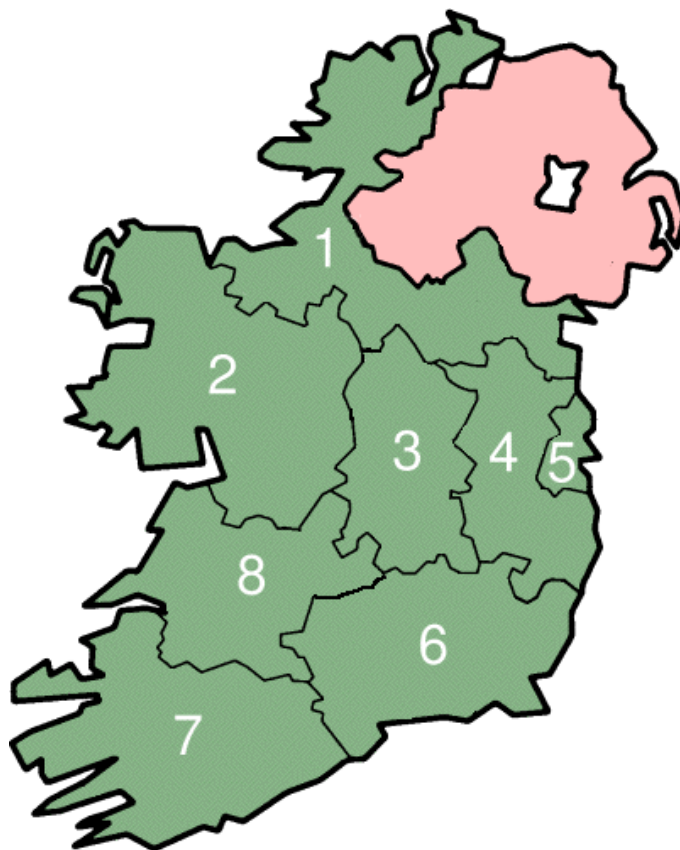


Appendix 2: Retail Spending per Head in the Mid-West of Ireland
(€ per person)

	Retail Goods	Convenience Goods	Comparison Goods	of which:	
				Non-Bulky	Bulky
2007	5737	2768	2969	2138	831
2008	5657	2689	2968	2129	839
2009	5546	2624	2921	2094	827
2010	5613	2643	2970	2131	839
2011	5775	2687	3088	2213	875
2012	5993	2734	3259	2332	928
2013	6228	2774	3454	2466	988
2014	6412	2790	3622	2583	1040
2015	6622	2814	3808	2712	1096
2016	6833	2836	3997	2843	1154
2017	7097	2869	4228	3003	1225
2018	7351	2894	4457	3162	1295
2019	7577	2910	4667	3308	1360
2020	7814	2928	4886	3459	1427



Appendix 3: NUTS Regions in Ireland



Key:

Border, Midland and Western NUTS 2 Region		Southern and Eastern NUTS 2 Region	
1	Border	3	Midland
2	West	4	Mid-East
		5	Dublin
		6	South East
		7	South West
		8	Mid-West

RETAIL STRATEGY FOR THE MID WEST REGION 2010-2016

APPENDIX 4C

**Tourist Expenditure on Shopping within the
Mid West Region**

REVIEW OF MID WEST RETAIL STRATEGY

Quantitative Retail Floorspace Need Assessment

Methodology for Estimating Inflow Expenditure from Outside the Household Survey Area

1. The main purpose of the household telephone survey is to quantify the distribution of available retail expenditure on convenience goods and comparison goods amongst existing centres, retail parks and stores. This allocation of spend relates to only the residential population **within the survey area**, which consists of Clare County, Limerick County, Limerick City and North Tipperary, as well as part of South Tipperary (See **Figure 1.1** in main report).
2. The relatively extensive survey area covers the whole of the Mid West Region and has been designed to capture the vast majority of shopping trips made to Limerick City, Ennis and other leading centres within the region. Nevertheless, in addition, there will also be retail spending at centres and shops within the Mid West from people **living outside of the region**. In practice, such spenders will fall into two groups:-
 - residents living just outside the Mid West Region;
 - tourists to the region who originate from the rest of the country and overseas.

Expenditure by Residents Living Just Outside the Mid West Region

3. The 2003 Retail Strategy was based in part on shopper surveys carried out in eleven town/shopping centres during January/February, 2002. These surveys confirmed that very few people come into the Mid West to shop and that the

region was a very self contained retail catchment area.¹ This finding is consistent with the fact that major competitor centres are located around the boundary of the Mid West Region – Cork, Galway, Tralee etc – which make it unlikely that material numbers of residents will travel into the region to shop. Although parts of South Tipperary may well fall within the retail influence of Limerick City, this area is covered by the household survey (zone 11). For these reasons, we do not make any specific allowance for inflow retail spend from residents living just outside the survey area; any minor expenditure flows originating from this source will, however, be picked-up in the domestic tourist data (see below).

Expenditure by Tourists to the Mid West Region

4. The 2003 Retail Strategy, based on the shopper surveys undertaken at the time, concluded that tourist activity in town/shopping centres was negligible, although it acknowledged that the surveys were carried out during January/February when few tourists would be expected to be around.¹ Nevertheless, the quantitative retail floorspace need assessment underpinning the 2003 Retail Strategy appears to only take into account expenditure flows between counties (which are derived from the household telephone survey) and **not** spending inflows to the Mid West from tourists. The Revised Retail Strategy, therefore, seeks to estimate the existing and future levels of retail spend by tourists to the region, although the range and quality of the data available to do this is limited.
5. The approach to estimating in-flow spend by tourists consists of a number of steps as follows:-

(a) Estimate Total Expenditure by Tourists in The Mid West

6. Failte Ireland estimate total tourist spending in Shannon Region (same as the Mid West, except includes West Offaly) in 2007 (the most recent year for which data is available) to be €518 million.² This may be broken down as follows:-

¹ Technical Appendix to the Retail Strategy for the Mid West Region, May 2003, paragraph 11.4.

¹ Technical Appendix to the Retail Strategy for the Mid West Region, May 2003, paragraph 11.4.

² Source: Failte Ireland, Shannon Region, Fact Sheet, September 2008.

Origin of Tourists	€Million
<i>Domestic</i>	138.5
<i>Northern Ireland</i>	11.2
<i>Overseas</i>	368.1
Total	517.8

7. The total of €518 million is reduced by €4 million¹ to exclude expenditure in West Offaly, which is not in the Mid West Region.

(b) Allocate Total Tourist Spend by County

8. Failte Ireland provide an allocation of the 2007 overseas tourist spend in the Mid West by County. This is as follows:-

Area	Col %*
<i>County Clare</i>	41
<i>County Limerick (incl. City)</i>	55
<i>North Tipperary</i>	4
Total	100

**Calculated on the basis of excluding West Offaly.*

9. It is assumed this percentage distribution of expenditure also applies to domestic tourists and those from Northern Ireland.

¹ Source: Failte Ireland, Shannon Region Fact Sheet, September 2008.

(c) Estimate Actual Total Tourist Spend by County

10. Applying the percentages by area at (b) to the total 2007 tourist spend in the Mid West of €518 million, given the following levels of expenditure by County.

Area	€ Million
County Clare	212
County Limerick (incl. City)	285
North Tipperary	21
Total	518

(d) Estimate Actual Tourist Spend on Shopping by County

11. Failte Ireland estimate that 17% of the spend by overseas tourists to Ireland as a whole in 2007 was on shopping.¹ We assume the same proportion for the Mid West Region and also conservatively assume the percentage applies to expenditure by domestic tourists and tourists from Northern Ireland.
12. Therefore, applying 17% to the total tourist spends by County at (c) gives the following levels of tourist spending in shops in 2007 by area.

Area	€ Million
County Clare	36
County Limerick (incl. City)	48
North Tipperary	4
Total	88

¹ Source: Failte Ireland, Tourism Facts, 2007.

(e) Disaggregate Tourist Retail Expenditure by Broad Category of Goods

13. There is no reliable information published on the types of shops at which tourists spend their money. The analysis is therefore informed by a street survey of tourists in Dublin City Centre carried out by Colliers CRE in October 2007 to inform the Revised GDA Retail Strategy.¹ This estimated the following breakdown of tourist spend:-

Category of Goods	Col %
Convenience goods	8
Comparison goods	92
Total	100

14. Taken at face value, the Mid West appears a very different area for tourism than Dublin. A major driver of retail spend for convenience goods shopping is the type of accommodation used; the more bed nights in rental accommodation or caravans/camping the higher the likely levels of spending on groceries, since visitors are more likely to cater for themselves rather than eat out in pubs or restaurants. In the Mid West 37% of tourist bed nights are accounted for by these forms of accommodation, which is very close to the figures for Dublin and Ireland as a whole.
15. Accordingly, in relation to the Mid West, there appears to be no real justification for making a major adjustment to the 8% share of spend on convenience goods. Nevertheless, “gut feel” suggests it may, in practice, be a little higher, so the proportion is rounded-up to 10%. This mans an estimated 90% of tourist spend in the Mid West in shops is on comparison goods. Given the nature of bulky

¹ Retail Strategy for the Greater Dublin Area, 2008-2016.

comparison goods (mainly found in out of centre retail warehouses in the Mid West), it is further assumed that **all** the comparison spend is on **non-bulky** comparison goods.

16. The estimated disaggregation of tourist spend is 2007 by broad category of goods is therefore:-

Area	Convenience Goods (€Million)	Comparison Goods (€Million)
County Clare	3.6	32.4
County Limerick (incl. City)	4.8	43.2
North Tipperary	0.4	3.6
Total	8.8	79.2

(f) Allocate Tourist Retail Spend Within Each County By Town and Sub-Area

17. There is no information available on tourist retail expenditure flows at the local level. It is therefore assumed that tourist spend on shopping within each County is distributed according to the pattern of resident consumer retail expenditure to major centres/sub-areas – this data is generated by the household survey. This distribution is set out in the table overleaf.

County		Centre/Area	Distribution of Expenditure Originating from Residents		Allocation of Tourist Spend, 2007	
			Convenience Goods (%)	Non-Bulky Comparison Goods (%)	Convenience Goods (€Million)	Non-Bulky Comparison Goods (€Million)
Clare	Ennis		65	79	2.3	25.6
	Shannon		9	6	0.3	1.9
	Rest of County		26	15	1.0	4.9
	Sub-Total		100	100	3.6	32.4
County Limerick (incl.City)	City Centre		5	61	0.2	26.3
	Rest of City		48	9	2.3	3.9
	Crescent Shopping Centre,		12	24	0.6	10.4
	Rest of Limerick – Suburbs (excl. City)		13	1	0.6	0.4
	Rest of County		22	5	1.1	2.2
	Sub-Total		100	100	4.8	43.2
North Tipperary	All Centres		100	100	0.4	3.6
Total	-		-	-	8.8	79.2

Forecast Growth in Tourist Retail Expenditure

18. There are no forecasts available for the likely future number of tourists to the Mid West Region, let alone likely levels of tourist spending on shopping. Published statistics by Failte Ireland show that total tourism revenue (according to their

estimates) in the Shannon Region (almost identical to the Mid West) increased by 19% between 2003 and 2007 (at current prices).¹ However, discounting for inflation reduces the ‘**real**’ growth in overall tourist spend to around 6% over four or less than 2% per annum. It is assumed that tourist spend on shopping will have risen at the same rate as total tourist revenue.

19. Failte Ireland advise that due to the economic downturn, the real growth in tourist revenues experienced in recent years is unlikely to continue and may even fall. For this reason it is assumed that the 2007 levels of tourist shopping spend will remain constant through to 2010 (at 2007 prices). Thereafter, we assume a return to trend and apply a 2% per annum real growth for the Mid West Region.
20. The estimated tourist shopping spends by County (at constant 2007 prices) at the base year of 2009 and the forecast years of 2016 and 2022 are as follows:-

County	Year	Convenience Goods (€Million)	Non-Bulky Comparison Goods (€Million)
Clare	2009	3.6	32.4
	2016	4.0	36.4
	2022	4.6	41.1
Limerick (incl. City)	2009	4.8	43.2
	2016	5.4	48.7
	2022	6.2	54.9
North Tipperary	2009	0.4	3.6
	2016	0.4	4.1
	2016	0.5	4.6
Total	2009	8.8	79.2
	2016	9.8	89.2
	2022	11.3	100.6

¹ Failte Ireland, Shannon Region Fact, Sheet, September 2008.

RETAIL STRATEGY FOR THE MID WEST REGION 2010-2016

APPENDIX 5

**Retail Floorspace Data: Floorspace Stock
Figures and Turnover Estimates**

RETAIL STRATEGY FOR THE MID WEST REGION 2010-2016

APPENDIX 5A

**Methodology for Estimating Existing Retail
Floorspace Stock**

QUANTITATIVE RETAIL FLOORSPACE NEED ASSESSMENT

Methodology for Estimating Existing (March 2009) Retail Floorspace Stock and Retail Development Pipeline within the Mid West Region

The retail floorspace in the quantitative need assessment is categorised into convenience goods, non-bulky comparison goods and bulky comparison goods/retail warehousing using the definitions set out in **Table 1** below. These definitions are consistent with those adopted for the estimation of consumer retail expenditure per head.

Table 1: Use Category Definitions

Convenience	Food Alcoholic and non alcoholic beverages Tobacco Non-durable household goods
Non-Bulky Comparison	Clothing and footwear Furniture, furnishings and household equipment (excluding non-durable household goods) Medical and pharmaceutical products, therapeutic appliances and equipment Educational and recreation equipment and accessories Books, newspapers and magazines Goods for personal care and goods not elsewhere classified The value of repairs is excluded in all cases.
Bulky Comparison	Goods generally sold from retail warehouses where DIY goods or goods such as flatpack furniture are of such a size that they would normally be taken away by car and not be manageable by customers travelling by foot, cycle or bus, or that large floor areas would be required to display them e.g. furniture in room sets, or not large individually, but part of a collective purchase which would be bulky e.g. wallpaper, paint.

Source: Retail Planning: Guidelines for Planning Authorities, Annex 1, January 2005

The floorspace data relates to properties in 'retail use' only, meaning services normally found on the high street (such as banks, post offices, hairdressers, travel agents and cafes) are excluded. Also excluded are car showrooms.

In order to calculate the existing (March 2009) retail floorspace in the Mid West Region, the retail floorspace generated by DTZ Sherry FitzGerald in December 2001 is used as a start point and baseline in all counties, except County Clare where up to date existing floorspace data was provided for March 2009. Each Council within the Mid West Region then provided details of planning applications that had received planning consent since December 2001. Information for each application included the amount of floorspace by type, location and status (i.e. permission or built). Only schemes that had been built were included at this point. The addition of the DTZ Sherry FitzGerald (2001) baseline retail floorspace totals and completions (excluding services) between 2001-2009 provide the estimates of current (March 2009) retail goods floorspace stock by centre, Council area and for the Mid West Region as a whole.

It should be noted that the existing retail floorspace stock totals for County Clare, the City of Limerick and North Tipperary County exclude (any) vacant, built floorspace. However, the existing floorspace data prepared by Limerick County Council includes vacant units. In our report (and needs assessment), we have excluded vacant units. Vacancy within Limerick County has been estimated by Colliers CRE following visits to all of the centres in February/March 2009. The following assumptions have been adopted:

For Limerick City Environs (% of floorspace vacant)

Convenience Goods – 0%

Non-Bulky Comparison Goods – 5%

Bulky Comparison Goods – 25%

For Limerick County Towns (% of floorspace vacant)

Convenience Goods – 5%

Non-Bulky Comparison Goods – 10%

Bulky Comparison Goods – 10%

Schemes that are cited by the Councils as being under construction, and/or with planning consent, but not yet built, as at March 2009, are defined as retail floorspace in the 'pipeline'. The pipeline floorspace does not include retail schemes that are either in the pre-planning or application stage.

Spreadsheets have been created for each county. These tables summarise by centre and broad retail goods category, the retail goods floorspace supply in 2001, the amount of new floorspace built between December 2001 and March 2009, the existing retail floorspace stock at March 2009 and lastly, the quantum of retail floorspace in the pipeline. The total amount of retail floorspace (existing (2009) shopping floorspace, plus pipeline) is also given.

Gross floorspace data was provided for the five Limerick County towns and we have, therefore, adopted the following ratios in converting the data to net retail floorspace (sales space).

Convenience Goods – 66:100 net to gross

Non-Bulky Comparison Goods – 66:100 net to gross

Bulky Comparison Goods – 90:100 net to gross

The ratio for convenience goods is the same as for non-bulky comparison goods and reflects the floorspace mix in modern, larger format supermarkets and superstores.

RETAIL STRATEGY FOR THE

MID WEST REGION

2010-2016

APPENDIX 5B

Existing Retail Floorspace and Retail
Development Pipeline

Limerick City: Existing (March 2009) Retail Floorspace and Retail Development Pipeline (All Figures in Sq M Net)

Location	Existing Convenience Floorspace (Excl New Build Since Dec 2001)	Convenience Floorspace Built Since Dec 2001	Existing Convenience Floorspace March 2009	Pipeline Convenience Floorspace	Existing plus Convenience Pipeline Floorspace	Existing Non-Bulky Comparison Floorspace Built Since Dec 2001	Existing Non-Bulky Comparison Floorspace March 2009	Pipeline Non-Bulky Comparison Floorspace	Existing plus Pipeline Non-Bulky Comparison Floorspace	Existing Bulky Comparison Floorspace (Excl New Build Since Dec 2001)	Bulky Comparison Floorspace Built Since Dec 2001	Existing Bulky Comparison Floorspace March 2009	Pipeline Bulky Comparison Floorspace	Existing plus Pipeline Bulky Comparison Floorspace	All Existing Retail Floorspace (Excl New Build Since Dec 2001)	All Retail Floorspace Built Since Dec 2001	All Existing Retail Floorspace March 2009	All Pipeline Retail Floorspace	All Existing plus Pipeline Retail Floorspace
Limerick City Centre	7,725	1,069	8,794	1,980	10,774	43,229	8,366	11,880	61,495	8,837	0	8,837	0	8,837	59,791	7,455	67,246	13,860	81,106
Arms Quay Shopping Centre	2,489	0	2,489	0	2,489	735	0	0	735	0	0	0	0	0	3,224	0	3,224	0	3,224
Limerick City Centre Total	10,214	1,069	11,283	1,980	13,263	43,964	8,366	11,880	62,230	8,837	0	8,837	0	8,837	63,015	7,455	70,470	13,860	84,330
Limerick City Out of Centre	4,608	8,426	13,034	1,980	15,014	2,597	22,495	6,488	31,580	7,165	17,683	24,848	2,295	27,143	14,370	48,604	62,974	10,763	73,737
Parkway District Centre	3,000	0	3,000	0	3,000	4,002	0	0	4,002	448	0	448	0	448	7,450	0	7,450	0	7,450
Roxboro Shopping Centre	3,021	0	3,021	0	3,021	437	0	0	437	0	0	0	0	0	3,458	0	3,458	0	3,458
Limerick Out of Centre Total	10,629	8,426	19,055	1,980	21,035	7,036	22,495	6,488	36,019	7,613	17,683	25,296	2,295	27,591	25,278	48,604	73,882	10,763	84,645
Limerick City Total	20,843	9,495	30,338	3,960	34,298	51,000	28,861	18,368	98,249	16,450	17,683	34,133	2,295	36,428	88,293	56,059	144,352	24,623	188,975

Note: Existing retail floorspace totals exclude vacant units.

Source: Limerick City Council and Colliers CRE , 2009.

Limerick County: Existing (March 2009) Retail Floorspace and Retail Development Pipeline (All Figures in Sq M Net)

Location	Centre	Existing Convenience Floorspace Dec 2001	Convenience Floorspace Built Since Dec 2001	Existing Convenience Floorspace March 2009	Pipeline Convenience Floorspace	Existing plus Pipeline Convenience Floorspace	Existing Non Bulky Comparison Floorspace Dec 2001	Non-Bulky Comparison Floorspace Built Since Dec 2001	Existing Non Bulky Comparison Floorspace March 2009	Pipeline Non Bulky Comparison Floorspace	Existing plus Pipeline Non Bulky Comparison Floorspace Dec 2001	Existing Bulky Comparison Floorspace Built Since Dec 2001	Bulky Comparison Floorspace Built Since Dec 2001	Existing Floorspace March 2009	Pipeline Bulky Comparison Floorspace	Existing plus Pipeline Bulky Comparison Floorspace	All Existing Retail Floorspace Dec 2001	All Retail Floorspace Built Since Dec 2001	All Existing Retail Floorspace March 2009	All Pipeline Retail Floorspace March 2009	All Existing plus Pipeline Retail Floorspace
Limerick City Environs	Limerick City Environs	4,363	3,786	8,149	5,388	13,537	2,933	4,823	7,756	13,487	21,243	5,349	32,112	37,461	8,058	45,519	12,645	40,721	53,366	26,933	80,299
Limerick City Environs	Casleary Court Shopping Centre	3,329	3,329	6,658	5,104	11,762	1,032	1,032	2,064	4,234	6,298	0	0	0	0	0	4,361	4,361	8,722	9,338	18,060
Limerick City Environs	Crescent Shopping Centre	3,396	7,220	10,616	0	10,616	13,106	5,415	18,521	0	18,521	0	0	0	0	0	16,502	12,635	29,137	0	29,137
Limerick City Environs	Riverside Retail Park	0	0	0	0	0	0	0	0	0	0	3,807	1,623	0	3,394	8,824	3,807	3,075	5,430	3,394	8,824
Limerick City Total		11,088	14,335	25,423	10,492	35,915	17,071	11,270	28,341	17,721	46,062	9,156	33,735	42,891	11,452	54,343	37,315	59,340	96,655	39,665	136,320
Limerick County Towns	Abbeyfeale	2,000	1,774	3,774	0	3,774	3,500	0	3,500	0	3,500	1,500	0	1,500	0	1,500	7,000	1,774	8,774	0	8,774
Limerick County Towns	Adare	1,500	504	2,004	0	2,004	2,500	180	2,680	0	2,680	500	0	500	0	500	4,500	684	5,184	0	5,184
Limerick County Towns	Newcastlewest	3,513	2,550	6,063	0	6,063	5,251	1,390	6,641	0	6,641	2,072	1,346	3,418	0	3,418	10,836	5,286	16,122	0	16,122
Limerick County Towns	Rathkeale	1,500	292	1,792	779	2,571	2,500	1,383	3,883	0	3,883	1,000	0	1,000	0	1,000	5,000	1,874	6,874	779	7,453
Limerick County Towns	Kilmallock	1,000	332	1,332	494	1,826	2,000	0	2,000	0	2,000	500	0	500	0	500	3,500	332	3,832	494	4,326
Limerick County Towns Total		9,513	5,452	14,965	1,273	16,238	15,751	2,952	18,703	0	18,703	5,572	1,346	6,918	0	6,918	30,836	9,750	40,586	1,273	41,859
Limerick County Total		20,601	19,787	40,388	11,765	52,153	32,822	14,222	47,044	17,721	64,765	14,728	35,081	49,809	11,452	61,261	68,151	69,090	137,241	40,938	178,179

December 2001 retail floorspace for Abbeyfeale, Adare, Rathkeale and Kilmallock estimated by Colliers CRE.

Note: The existing floorspace data prepared by the County Council includes vacant units.*

Source: Limerick County Council and Colliers CRE, 2009.

*In our report (and needs assessment), we have excluded vacant units. Vacancy has been estimated by Colliers CRE following visits made to all of the centres in February/March 2009. The following assumptions have been adopted:

For Limerick City Environs (% of floorspace vacant)

- Convenience Goods - 0%
- Non-Bulky Comparison Goods - 5%
- Bulky Comparison Goods - 25%

For Limerick County Towns (% of floorspace vacant)

- Convenience Goods - 5%
- Non-Bulky Comparison Goods - 10%
- Bulky Comparison Goods - 10%

County Clare: Existing (March 2009) Retail Floorspace and Retail Development Pipeline (All Figures in Sq M Net)

Location	Centre	Existing Convenience Floorspace March 2009	Pipeline Convenience Floorspace	Existing plus Pipeline Convenience Floorspace	Existing Non-Bulky Comparison Floorspace March 2009	Pipeline Non-Bulky Comparison Floorspace	Existing plus Non-Bulky Comparison Floorspace	Existing Bulky Comparison Floorspace March 2009	Pipeline Bulky Comparison Floorspace	Existing plus Pipeline Bulky Comparison Floorspace	All Existing Retail Floorspace March 2009	All Pipeline Retail Floorspace	All Existing plus Pipeline Retail Floorspace	Vacant Floorspace March 2009
Ennis	Ennis - Town Centre	5,421	0	5,421	11,064	0	11,064	3,735	0	3,735	20,220	0	20,220	1,563
	Ennis - Out of Centre	3,930	165	4,095	221	495	716	839	0	839	4,990	660	5,650	9,243
	Ennis Retail Parks	0	853	853	2,498	531	3,029	21,466	650	22,116	23,964	2,034	25,998	0
Ennis Total		9,351	1,018	10,369	13,783	1,026	14,809	26,040	650	26,690	49,174	2,694	51,868	10,806
Kilrush	Kilrush Town Centre	3,976	1,029	5,005	2,660	2,193	4,853	959	5,735	6,694	7,596	8,957	16,552	825
Kilrush Total		3,976	1,029	5,005	2,660	2,193	4,853	959	5,735	6,694	7,595	8,957	16,552	825
West Clare	Kilkee	563	0	563	0	0	0	0	0	0	563	0	563	0
West Clare Total		563	0	563	0	0	0	0	0	0	563	0	563	0
	Ennistymon	2,084	0	2,084	489	434	923	0	0	0	2,573	434	3,007	0
	Lisdoonvarna	337	299	636	114	0	114	0	0	0	451	299	750	0
	Miltown Malbay	490	0	490	219	0	219	0	0	0	710	0	709	0
	Ballyvaughan	411	0	411	26	0	26	0	0	0	437	0	437	0
	Lahinch	1,558	0	1,558	329	0	329	0	0	0	1,887	0	1,887	0
	Corofin	415	0	415	203	0	203	0	0	0	618	0	618	0
North Clare Total		5,295	299	5,594	1,380	434	1,814	0	0	0	6,675	733	7,408	0
East Clare	Kilaloe	940	0	940	1,006	0	1,006	0	0	0	1,946	0	1,946	0
	Scariff/Tuamgraney	1,160	0	1,160	608	0	608	0	0	0	1,768	0	1,768	0
	Tulla	577	702	1,279	436	483	919	0	0	0	1,013	1,185	2,198	0
East Clare Total		2,677	702	3,379	2,050	483	2,533	0	0	0	4,727	1,185	5,912	0
	Shannon - Town Centre	2,627	3,429	6,056	2,382	3,293	5,675	5,054	0	5,054	10,063	6,722	16,785	440
	Sixmilebridge	845	478	1,323	911	485	1,396	0	0	0	1,756	963	2,719	0
	Westbury (Athlunkard)	743	0	743	305	0	305	0	0	0	1,048	0	1,048	0
	Bunratty	168	0	168	1,059	1,116	2,175	0	0	0	1,227	1,116	2,343	0
	Newmarket-on-Fergus	890	0	890	154	746	900	0	0	0	1,045	746	1,790	0
South Clare Total		5,273	3,907	9,180	4,811	5,640	10,451	5,054	0	5,054	15,138	9,547	24,685	440
County Clare Total		27,135	6,955	34,090	24,684	9,776	34,460	32,053	6,385	38,438	83,872	23,116	106,988	12,071

Note: Existing retail floorspace totals exclude vacant units.

Source: Clare County Council and Colliers CRE, 2009.

North Tipperary: Existing (March 2009) Retail Floorspace and Retail Development Pipeline (All Figures in Sq. M. Net)

Location	Centre	Existing Convenience Floorspace Dec 2001	Convenience Floorspace Built Since Jan 04	Existing Convenience Floorspace March 2009	Pipeline Convenience Floorspace	Existing Occupied plus Pipeline Convenience Floorspace	Existing Non-Bulky Comparison Floorspace Built Since Jan 04	Existing Non-Bulky Comparison Floorspace March 2009	Pipeline Non-Bulky Comparison Floorspace	Existing Occupied plus Pipeline Non-Bulky Comparison Floorspace	Existing Bulky Comparison Floorspace Dec 2001	Bulky Comparison Floorspace Built Since Jan 04	Existing Bulky Comparison Floorspace March 2009	Pipeline Bulky Comparison Floorspace	Existing Occupied plus Pipeline Bulky Comparison Floorspace	All Existing Occupied plus Pipeline Retail Floorspace Dec 2001	All Retail Floorspace Built Since Jan 04	All Existing Occupied plus Pipeline Retail Floorspace March 2009	All Existing Occupied plus Pipeline Retail Floorspace
Nenagh	Nenagh Town	6,437	5,206	11,643	0	11,643	3,129	10,211	0	10,211	0	6,582	6,582	0	0	13,519	14,917	28,436	0
	O'Connor's Shopping Centre	1,803	0	1,803	0	1,803	0	2,071	0	2,071	0	0	0	0	0	3,874	0	3,874	0
Nenagh Total		8,240	5,206	13,446	0	13,446	3,129	12,282	0	12,282	0	6,582	6,582	0	0	17,393	14,917	32,310	0
Roscrea	Roscrea Town	2,911	1,977	4,888	0	4,888	1,721	6,909	517	7,426	0	4,580	4,580	5,808	10,388	8,099	8,278	16,377	22,702
	Castle Street Shopping Centre	1,245	0	1,245	0	1,245	0	326	0	326	0	0	0	0	0	1,571	0	1,571	0
Roscrea Total		4,156	1,977	6,133	0	6,133	1,721	7,235	517	7,752	0	4,580	4,580	5,808	10,388	9,670	8,278	17,948	24,273
Thurles	Thurles Town	5,659	3,968	9,627	1,800	11,427	0	8,881	5,916	12,797	2,059	12,854	14,913	2,926	17,839	14,599	16,822	31,421	42,063
	Thurles Shopping Centre	1,064	678	1,742	0	2,342	0	2,457	4,064	6,541	0	0	0	0	0	4,121	678	4,799	4,064
Thurles Total		7,323	4,646	11,969	1,800	13,769	0	9,338	10,000	19,338	2,059	12,854	14,913	2,926	17,839	18,720	17,500	36,220	46,126
Other Towns	BallinaBirdhill		0	0	0	0	273	273	0	273	0	0	0	0	0	0	273	273	273
	Newport		0	0	3,967	3,967	0	0	6,189	6,189	0	0	0	0	0	0	0	0	0
	Borrisokane	1,724	1,496	3,069	0	1,496	879	879	0	879	0	0	0	0	0	0	2,375	2,375	10,176
	Templemore	1,724	1,345	3,069	0	3,069	682	682	0	682	3,387	0	3,387	0	3,387	5,793	1,345	7,138	0
Other Towns Total		1,724	2,841	4,565	3,967	8,562	1,152	1,834	6,189	8,023	3,387	0	3,387	0	3,387	5,793	3,993	9,786	10,176
North Tipperary County Total		21,443	14,670	36,113	5,767	41,900	6,002	30,689	16,706	47,395	5,446	24,016	29,462	8,734	38,196	51,576	44,688	96,264	127,491

Negligible amount (assumed to be zero)

Note: Existing retail floorspace totals exclude vacant units.

Source: North Tipperary County Council and Colliers CRE, 2009.

Location	Centre	Existing Vacant Convenience Floorspace March 2009	Existing Non-Bulky Comparison Floorspace March 2009	Existing Vacant Bulky Comparison Floorspace March 2009
Nenagh	Nenagh Town	0	0	2,100
	O'Connor's Shopping Centre	0	0	0
Nenagh Total		0	0	2,100
Roscrea	Roscrea Town	0	0	0
	Castle Street Shopping Centre	0	0	0
Roscrea Total		0	0	0
Thurles	Thurles Town	0	2,637	1,000
	Thurles Shopping Centre	0	0	0
Thurles Total		0	2,637	1,000
Other Towns	BallinaBirdhill	0	0	9,359
	Newport	5,825	1,819	1,824
	Borrisokane	0	0	0
	Templemore	0	0	0
Other Towns Total		5,825	1,819	11,183
North Tipperary County Total		5,825	4,456	14,283

RETAIL STRATEGY FOR THE MID WEST REGION 2010-2016

APPENDIX 5C

**Retail Development Pipeline – Turnover
Estimates at 2016 and 2022**

(A) Retail Development Pipeline: Non-Bulky Comparison Goods (as at March 2009)

<i>Area/Location</i>	<i>Sq M Net</i>	<i>Assumed Sales Density in 2016 (€ per Sq M Net)</i>	<i>Estimated Turnover in 2016 (€ M)</i>	<i>Assumed Sales Density in 2022 (€ per Sq M Net)</i>	<i>Estimated Turnover in 2022 (€ M)</i>
Limerick City Centre	11,880	€7,000	83.2	€7,768	92.3
Limerick – Rest of City	6,488	€7,000	45.4	€7,768	50.4
Crescent Shopping Centre	0	€7,000	0	€7,768	0
Rest of Limerick – Suburbs (Excl. City)	17,721	€7,000	124.0	€7,768	137.7
Rest of Limerick County	0	€7,000	0	€7,768	0
Ennis	1,026	€7,000	7.2	€7,768	8.0
Shannon	3,293	€7,000	23.1	€7,768	25.6
Rest of Clare County	5,457	€7,000	38.2	€7,768	42.4
North Tipperary	16,706	€7,000	116.9	€7,768	129.8
Mid West Total	62,571	€7,000	438.0	€7,768	486.2

(B) Retail Development Pipeline: Bulky Comparison Goods (as at March 2009)

<i>Area/Location</i>	<i>Sq M Net</i>	<i>Assumed Sales Density in 2016 (€ per Sq M Net)</i>	<i>Estimated Turnover in 2016 (€ M)</i>	<i>Assumed Sales Density in 2022 (€ per Sq M Net)</i>	<i>Estimated Turnover in 2022 (€ M)</i>
Limerick City Centre	0	€4,000	0	4,439	0
Limerick – Rest of City	2,295	€4,000	9.2	4,439	10.2
Crescent Shopping Centre	0	€4,000	0	4,439	0
Rest of Limerick – Suburbs (Excl. City)	11,452	€4,000	45.8	4,439	50.8
Rest of Limerick County	0	€4,000	0	4,439	0
Ennis	650	€4,000	2.6	4,439	2.9
Shannon	0	0	0	4,439	0
Rest of Clare County	5,735	€4,000	22.9	4,439	25.5
North Tipperary	8,734	€4,000	34.9	4,439	38.8
Mid West Total	28,866	€4,000	115.4	4,439	128.2

(C) Retail Development Pipeline: Convenience Goods Floorspace (as at March 2009)

<i>Area/Location</i>	<i>Sq M Net</i>	<i>Assumed Sales Density in 2016 (€ per Sq M Net)</i>	<i>Estimated Turnover in 2016 (€ M)</i>	<i>Assumed Sales Density in 2022 (€ per Sq M Net)</i>	<i>Estimated Turnover in 2022 (€ M)</i>
Limerick City Centre	1,980	€10,000	19.8	£10,304	20.4
Limerick – Rest of City	1,980	€10,000	19.8	£10,304	20.4
Crescent Shopping Centre	0	€10,000	0	£10,304	0
Rest of Limerick – Suburb (Excl. City)	10,492	€10,000	104.9	£10,304	108.1
Rest of Limerick County	1,273	€10,000	12.7	£10,304	13.1
Ennis	1,018	€10,000	10.2	£10,304	10.5
Shannon	3,429	€10,000	34.3	£10,304	35.3
Rest of Clare County	2,508	€10,000	25.1	£10,304	25.8
North Tipperary	5,787	€10,000	57.9	£10,304	59.6
Mid West Total	28,467	€10,000	284.7	£10,304	293.3

RETAIL STRATEGY FOR THE

MID WEST REGION

2010-2016

APPENDIX 6

**Quantitative Retail Floorspace Need
Assessment**

RETAIL STRATEGY FOR THE

MID WEST REGION

2010-2016

APPENDIX 6A

Description of Methodology

REVIEW OF MID WEST RETAIL STRATEGY

Quantitative Retail Floorspace Need Assessment:

Description of Methodology

Objectives

1. This Appendix describes in detail the approach taken to estimate the quantitative need for additional convenience goods and non-bulky and bulky comparison goods floorspace within the Mid West Region as a whole and its constituent Council areas and major centres, which have been agreed with the Councils.
2. The analysis estimates the amount of over/under trading at the base year (2009) by comparing actual (survey-based turnovers) against benchmark turnovers and takes any expenditure “surplus” or “shortfall” into account in determining the available headroom expenditure at the forecast years of 2016 and 2022. This is considered to be a realistic approach, since it reflects the variability in the present retail performance of centres across the Mid West.
3. The assessment provides the following information:-
 - Estimates of total available retail expenditure within the Mid West (and sub areas) at the base year of 2009 and the forecast years of 2016 and 2022 (these years having been agreed with the Councils);
 - Estimates of the retail turnover likely to be ‘retained’ by the Mid West (and sub areas) at each of the forecast years;
 - Estimates of “headroom” expenditure and therefore retail floorspace need within the Mid West (and sub areas) at the forecast years; and

- Quantitative retail floorspace need disaggregated into convenience goods and non-bulky and bulky comparison goods retail floorspace.
4. The results of the need assessment will be used by the Councils to inform retail policies in their new City and County plans. The results should also assist the Councils respond to any emerging retail proposals.

Approach to Retail Floorspace Need

5. The broad approach to estimating the need for (any) additional retail floorspace comprises of seven main steps, which in aggregate cover the three main stages of analysis:
- (i) Forecasting consumer demand;
 - (ii) Forecasting retail supply; and
 - (iii) The conversion of (any) surplus retail expenditure into a retail floorspace requirement.
6. The analysis seeks to be transparent and robust. The assessment is also presented in a way that enables it to be updated in the future as more up-to-date statistics become available and the emerging pattern of shopping activity becomes more established.
7. Separate quantitative retail need assessments for convenience goods and non-bulky and bulky comparison goods have been carried out.

Non-Bulky and Bulky Comparison Goods Floorspace Need Assessment

Step 1: Calculate Total Available Expenditure in the Survey Area

8. The household survey area is shown in **Figure 4.1** in the main report and is defined to encompass the shopping catchment areas of the principal centres in the Mid West Region. Within this area the quantum of available non-bulky and bulky comparison goods expenditure is derived by multiplying (resident) population by average annual expenditure per head on each category of goods (see **Appendix 4B** for the consumer retail spend per head data). This calculation is carried out for each of the 11 zones which comprise the survey area.
9. Population figures by zone and for the survey area as a whole are set out in **Appendices 6B and 6C, Table 1** for non-bulky and bulky comparison goods respectively. In addition to estimates for 2009 (the base year), population projections for 2016 and 2022 are also included.
10. **Appendices 6B and 6C, Table 2** give the average annual expenditure per person on non-bulky and bulky comparison goods respectively for residents living in each of the 11 zones comprising the survey area. The per person expenditure estimates are projected forwards to the forecast years of 2016 and 2022 by adopting 2007 – based expenditure per head forecasts produced for this Review in March 2009. (see **Appendix 4B**).
11. At **Appendices 6B and 6C, Table 3** deductions are made to the per person expenditure estimates to account for retail expenditure which does not take place in shops such as that on mail order shopping, door to door salesmen and market and road-side stalls. This form of expenditure also includes e-tailing and is generally known as “special forms of trading” (SFT).
12. In presenting expenditure forecasts through to 2022, it should be borne in mind that there are currently a number of electronic shopping formats which, should they become more widely established, could reduce significantly the proportion of

retail expenditure that is now spent in conventional shops. The recently published research on the future growth in **e-tailing** expenditure has been reviewed (discussed in Section 5 of the main report) and it has been concluded that SFT is likely to increase as a proportion of total consumer retail expenditure over the period to 2022. This important assumption is built into our quantitative need assessment. However, it should be stressed that this assumption should be reviewed from time to time, since, were it to change significantly, it could have a material impact on future levels of retail floorspace by either reducing or increasing the need for additional shopping provision.

13. The estimates of total available consumer retail expenditure on non-bulky and bulky comparison goods at the base year (2009) are set out in **Appendices 6B and 6C, Table 4** respectively. Forecasts are also given for the forecast years of 2016 and 2022. The increases in available expenditure are due to:-

- The forecast growth in population;
- Real annual increases in consumer comparison goods expenditure per head.

Step 2: Application of “Market Shares” to Determine Amount of Retained Expenditure

14. As a consequence of increases in the volume of consumer expenditure per head running in tandem with population growth, the “pool” of available expenditure on non-bulky comparison goods within the survey area will increase by some €384 million between the base year (2009) and the forecast year of 2016 (**Appendix 6B, Table 4**), whilst by 2022 the growth in available non-bulky comparison goods spend is estimated at €902 million. The comparable increases for bulky comparison goods at 2016 and 2022 are €164 million and €393 million respectively. (**Appendix 6C, Table 4**).
15. However, not all of this growth in consumer expenditure will be spent within the Mid West and is available to support new retail floorspace in the Region. This is because competitor centres to those within the Mid West also lay claim to the

same growing “pool” of expenditure. This requires the “market share” of the Mid West to be calculated.

16. Existing “market shares” for non-bulky and bulky comparison goods shopping have been derived from the household telephone survey carried out in February, 2009. The survey provides useful information on the geographical extent of catchment areas and trade penetration around existing centres by quantifying the pattern and volume of retail expenditure flows from each of the defined zones (where people live and money is generated) to a range of centres and out of centre stores (where people spend their money).
17. In addition, and of **critical** importance, the assessment also takes into account the distribution and volume of locally available consumer expenditure (or spending power) so as to ensure that the **retail turnover estimates are balanced against available retail consumer expenditure.**
18. The base year (2009) pattern of “market shares” generated by the retailing provision within each of the sub areas of the Mid West Region are set out in **Appendices 6B and 6C, Table 5** for non-bulky and bulky comparison goods shopping respectively. These market shares have been produced by amalgamating the individual market shares generated by the separate retail floorspace components making up each sub area (see **Appendix 3E**). The “market shares” are then applied to the 2009 “pools” of available non-bulky and bulky comparison goods expenditure for each sub area (as set out in **Table 5**). **Appendices 6B and 6C, Table 6** give the monetary amounts of non-bulky and bulky comparison goods expenditure flowing to the Mid West Region (and each sub area) by zone. The addition of these expenditure totals for each of the 11 zones gives the total amount of non-bulky and bulky comparison goods spend flowing to each sub area from the survey area as a whole. Allowances are also made (where appropriate) for in-flow expenditure from outside of the survey area, including monies originating from tourists (see **Appendix 4C** for full details).

Step 3: Determine Whether the Existing Retail Economy is Trading at Equilibrium

19. At this stage an assessment is made as to whether the existing non-bulky and bulky comparison goods retail economies of the Mid West (and each of its sub areas) are broadly trading at equilibrium or not. This is important because if the amount of consumer retail expenditure flowing to an area is high in relation to the stock of available retail floorspace and this appears to be causing problems to retailers and / or shoppers, then the area's retail offer may be described as over-trading. Conversely, if the expenditure flows are low relative to available retail floorspace, then this can result in under-trading of the retail offer.
20. If over-trading is occurring in an area (or centre) then it is commonly assumed that the turnover in excess of the equilibrium position is potentially available to support new shopping provision. If this occurs, then this element of expenditure should be added to the headroom expenditure which is later estimated from the future growth in the retail economy. Conversely, if an area (or centre) is under-trading at present, then it is also logical to deduct the amount of turnover shortfall relative to the equilibrium position from the defined headroom expenditures associated with the future growth in the retail economy.
21. The problem with this kind of analysis is determining whether an area (or centre) is trading at equilibrium or not. There are two principal difficulties. First, retailers need to achieve a certain trading level to be viable. However, this trading level varies substantially for individual retailers and for the same retailers for different centres across the country, reflecting differences in type of business, profit margins, site, costs (eg. rents), size, financial structure and other factors. Without detailed financial data on all individual traders in an area it is virtually impossible to determine what the average equilibrium trading level is. The second major difficulty is that even if it can be proven that an area is trading above its retail equilibrium position, this does not automatically mean that problems associated with over-trading occur; these may include retailer operating difficulties, in-store

congestion, over-busy streets leading to pedestrian safety and security problems, and congested car parks.

22. It is difficult to assess whether the Mid West retail economy (and each of its sub areas) is in retail equilibrium at present in relation to non-bulky and bulky comparison goods shopping because of the unavailability of sales floorspace and trading data on individual shops in each centre. Nevertheless, the Review seeks to be as robust as possible, since material conditions of over or under-trading in the base year do suggest there is an under or over-supply of retail floorspace already. To provide an accurate “benchmark” average sales density for a centre or sub area, knowledge of the appropriate sales per square metre of each shop comprising the centre is, in theory, required. Since this information is not available, broad estimates based on a range of criteria have been derived including:-

- published company average sales per sq m for individual retailers;
- the breadth and depth of retailers in a centre;
- the number of multiple traders present;
- the size of a centre (retail floorspace) and its position in the retail hierarchy; and
- rental levels.

23. The benchmark non-bulky and bulky comparison goods turnover estimates for each of the sub areas within the Mid West are set out at **Appendices 6B and 6C, Table 6.**

24. For non-bulky comparison goods shopping, the results of the household telephone survey suggest that the retail floorspace in the Mid West Region as a whole is currently under-trading by around €68 million per year, indicating that the actual turnover is lower than that required for retailers in the area to achieve “benchmark” sales levels. In practice, these assessments are made for each of the constituent sub-areas within the County and any over-or-under trading spends are added or deducted from the forecast headroom expenditures on an area by area basis. In relation to bulky comparison goods shopping, it is

estimated that the existing stock of retail floorspace within the Mid West as a whole is under-trading by some €69 million at the base year of 2009. Comparable assessments are also made for each constituent sub-area and the estimated over or under-trading expenditure totals are taken into account in the later analysis.

25. At **Appendices 6B and 6C, Table 7** the base year market shares are adjusted (where appropriate) to reflect the broad objective of retail policy, which is to support significant new non-bulky comparison goods investment in Limerick City Centre. This important assumption is discussed further in Section 5 of the main report.

Step 4: Calculate Growth in Retained Expenditure through to the Forecast Years

26. Having determined the base year (2009) “market shares” and levels of retained comparison goods expenditure within the Mid West Region as a whole and its constituent sub areas, the principle of market shares is used to calculate how much more spending or trade the Mid West (and its sub areas) could expect to attract in the future as a result of the forecast growth in available expenditure.
27. For each of the forecast years the market shares set out in **Appendices 6B and 6C, Table 7** are applied to the increased “pools” of available non-bulky and bulky comparison goods expenditure in each zone. The calculations for the forecast years of 2016 and 2022 are set out in **Appendices 6B and 6C, Tables 10 and 13** respectively. Due to the increase in demand (as a result of population growth and rising consumer expenditure per head), the assessment produces at 2016 higher retail turnover potentials for the Mid West Region and its constituent sub areas than in the base year (2009). Similarly, the turnover potentials are even higher for the forecast year of 2022.

Step 5: Determine Level of Potential Headroom Expenditure at the Forecast Years

28. It would be wrong to assume that all of the increase in turnover potential within the Mid West Region (and sub areas) will be available by the forecast year(s) to support additional non-bulky and bulky comparison goods shopping. This is because some of the forecast growth in expenditure must be allocated to existing retailers because the evidence confirms that they increase their sales productivities in real terms over time.
29. In **Appendices 6B and 6C, Table 8** the turnover allocations for existing retailers are deducted from the 2016 non-bulky and bulky comparison goods turnover potentials for the Mid West as a whole and each sub area. These calculations produce estimates of residual turnover potential for each sub area and for the Mid West Region. The base year (2009) turnovers are then subtracted from the 2016 residual turnovers to determine the quantum of potential headroom non-bulky and bulky comparison goods expenditure available in 2016 in each sub area and for the Mid West as a whole. A similar analysis is carried out in relation to non-bulky and bulky comparison goods for the forecast year of 2022 in **Appendices 6B and 6C, Table 11**.

Step 6: Determine Level of Residual Headroom Expenditure at the Forecast Years

30. **Appendices 6B and 6C, Table 9** set out the calculations to estimate the residual headroom expenditure for the Mid West Region (and the sub areas) at the forecast year of 2016 for non-bulky and bulky comparison goods floorspace respectively. The same assessments are carried out for the forecast year of 2022 in **Table 12**.
31. The first task is to adjust the potential headroom expenditures calculated for 2016 by taking into account the extent (if any) of any over or under-trading that is occurring within each sub area and in the Mid West as a whole at the base year (2009). This is necessary because the headroom expenditures set out so far assume that the sub areas and the Mid West as a whole are currently trading in retail equilibrium. For reasons already described this assumption may be viewed as unlikely.

32. Despite the difficulties of determining the extent of any over or under-trading within the Mid West and its sub areas, it is considered that including such estimates makes the quantitative need assessment more reliable and robust than ignoring them. Therefore, the over/under-trading estimates determined at **Appendices 6B and 6C, Table 6** are used to “**adjust**” the headroom expenditure totals. In practice, if a sub area is estimated to be under-trading at the present time, this will reduce the quantum of headroom expenditure at the forecast year(s) since some of the growth in expenditure is set-aside to bring the existing retail stock in that area up to a retail equilibrium trading position. Alternatively, if a sub area or centre is over-trading, this will increase the quantum of headroom expenditure at the forecast year(s) since the ‘surplus’ sales are assumed to be available to support additional retail floorspace. **Appendices 6B and 6C, Table 9** set out the calculations for making these adjustments to the 2016 headroom expenditures for non-bulky and bulky comparison goods respectively. **Table 12** repeats the calculations for the forecast year of 2022.
33. At this stage, in order to convert the adjusted headroom expenditures into residual headroom expenditures at the forecast years of 2016 and 2022, further (if applicable) deductions are made to account for that quantum of retail expenditure which is likely to be soaked up by retail floorspace commitments within the Mid West (commitments are retail developments in the pipeline, which are either under construction or have planning consent).
34. From information supplied to us by the Councils, we have produced schedules of non-bulky and bulky comparison goods retail commitments within the Mid West Region disaggregated by sub area. The schedule is reproduced in **Appendix 5C**. The schedule also gives estimates of the retail turnover of each commitment – these are given for each of the forecast years. These turnovers are then deducted from the adjusted headroom expenditure totals for each sub area as appropriate. These calculations are set out in **Appendices 6B and 6C Tables 9 and 12** for the forecast years of 2016 and 2022 respectively.

35. The final residual headroom expenditure totals for the Mid West Region as a whole and its sub areas at the forecast years of 2016 and 2022 are also set out in **Appendices 6B and 6C, Tables 9 and 12** for non-bulky and bulky comparison goods respectively.

Step 7: Estimate Need for Additional Retail Floorspace at the Forecast Years

36. The residual headroom expenditure totals are important because they provide an estimate of the amount of potential turnover which will be available to the Mid West Region as a whole and each of its sub areas by 2016 and 2022. The last step of the assessment is to convert these residual headroom expenditures into requirements for additional non-bulky and bulky comparison goods floorspace. However, the output of this last step is dependent on the application of average sales densities and these, in practice, are likely to vary enormously depending on the type of development that is proposed. For example, town centre stores comprising non-bulky comparison goods shopping typically trade at much higher average sales densities than retail warehouse style developments selling mainly bulky comparison goods. We would therefore recommended that appropriate weight is attached to the **residual headroom expenditure** totals, since these are not open to the same levels of interpretation as are the retail floorspace requirements set out in Section 5 of the main report.

Convenience Goods Floorspace Need Assessment

37. The retail need assessment for convenience goods floorspace follows the same approach as that for non-bulky and bulky comparison goods. The detailed calculations underpinning the analysis are reproduced in full in **Appendix 6D, Tables 1 to 16** inclusive.

Step 1: Calculate Total Available Expenditure in the Catchment Area

38. At **Appendix 6D, Tables 1 to 4** inclusive, the total available convenience goods expenditure by zone is determined for the base year (2009) and the forecast

years of 2016 and 2022. The analysis incorporates 2007 estimates of average annual spending per head on convenience goods within each zone, together with expenditure growth forecasts for the Mid West Region. Expenditure by “special forms of trading” is again excluded, although the allowance is much less than for comparison goods shopping.

Step 2: Application of “Market Shares” to Determine Amount of Retained Expenditure

39. Using the results of the household telephone survey the base year (2009) market shares for the Mid West Region and its sub areas are derived within each of the 11 zones¹. This assessment is set out in **Appendix 6D, Table 5**. Applying the market shares to the total “pools” of available expenditure within each zone in the base year (2009) (**Table 6**), gives the monetary flows of consumer spending from each of the 11 zones to the Mid West and its sub areas. As for comparison goods, an allowance is made for in-flow expenditure into the Mid West from tourists, although the amount is much less. The addition of the flows from each zone, together with the in-flow spend from tourists, gives the total estimated convenience goods turnover of the Mid West Region as a whole and its constituent sub areas at the base year of 2009.

Step 3: Determine Whether Existing Retail Economy is Trading at Equilibrium

40. For convenience goods shopping, the analysis carried out earlier in relation to non-bulky and bulky comparison goods is replicated, and the extent of any over or under-trading within the Mid West and its sub areas at the base year (2009) is calculated. In estimating the equilibrium convenience goods retail turnover in the base year the overall quantity, quality and location of the existing retail offer in each sub area has been taken into account. The benchmark turnovers are based on published sales densities for major retailers and on professional

¹ This involves grouping together the expenditure flows to individual named food stores in order to establish the overall market share of a centre and/or sub area.

judgement. **Appendix 6D, Table 6** confirms that the existing convenience goods floorspace in the Mid West as a whole is under-trading by €151 million in the base year (2009).

Step 4: Calculate Growth in Retained Expenditure through to the Forecast Years

41. Unlike for non-bulky comparison goods there is no justification for adjusting any of the convenience goods market shares in the Mid West Region going forwards. It is considered that this approach is consistent with sustainability objectives to reduce the number and distance of car journeys for shopping. **Appendix 6D, Table 7** sets out the market shares which are later applied to the pools of available expenditure at both of the design years. These calculations are set out in **Tables 8** and **11** for the forecast years of 2016 and 2022 respectively.

Step 5: Determine Level of Potential Headroom Expenditure at the Forecast Years

42. At **Appendix 6D, Tables 9** and **12** the levels of potential headroom expenditure within the Mid West and its constituent sub areas are determined at the forecast years of 2016 and 2022 respectively. As for non-bulky and bulky comparison goods, it is necessary to set aside a little of the expenditure growth for existing retailers to account for their real gains in sales productivity over time.

Step 6: Determine Level of Residual Headroom Expenditure at the Forecast Years

43. To convert the potential headroom expenditure figures into residual headroom expenditure estimates, account is taken of any under/over-trading that currently exists in the Mid West Region and its sub areas in the base year (2009). Where under-trading exists, some of the expenditure growth is set aside to bring the existing retail offer up to a retail equilibrium trading position. For any over-trading, the surplus spend is added to the headroom expenditure determined later on in the assessment.

44. The adjusted headroom expenditure totals for the Mid West as a whole and each sub area for the forecast years of 2016 and 2022 are set out in **Appendix 6D, Tables 10 and 13** respectively.
45. Lastly, account is taken of any existing convenience goods commitments within the Mid West Region. Full details of the retail commitments, including estimated turnovers, are set out in **Appendix 5C**. The calculations to produce the residual headroom expenditure totals for the forecast years of 2016 and 2022 are set out in **Appendix 6D, Tables 10 and 13** respectively.

Step 7: Estimate Need for Additional Retail Floorspace at the Forecast Years

46. The adjusted residual headroom expenditures may be converted into retail floorspace requirements but, as with non-bulky and bulky comparison goods, the floorspace estimates are entirely dependent on the average sales density applied to the floorspace. For this reason, it is recommended that appropriate weight is attached to the forecast quantum of residual expenditure available at the forecast years in relation to convenience goods.

Summary

47. The purpose of this Appendix has been to describe the approach taken to assess in quantitative terms the likely retail expenditure capacity for additional non-bulky and bulky comparison goods and convenience goods floorspace within the Mid West and its sub areas through to 2022. It must be stressed, however, that any quantitative analysis over such a long time-period (13 years from the base year of 2009) may be subject to a significant margin of error, particularly in the later years, since it is based on a number of assumptions which are difficult to forecast accurately. In addition, there are two further key assumptions which have a material bearing on the forecast levels of residual headroom expenditure. These are as follows:

- **Special forms of trading** – conservative forecasts have been assumed for the growth in non-store retail sales through to 2022. However, if actual growth were to exceed these rates, which is entirely possible, then the projected levels of retail floorspace need would be **less** than those forecast in this report. Alternatively, if actual SFT growth was less than has been forecast, then the quantum of floorspace need will be **more** than set out in this report.
- **Over / Under Trading at the base year** – the household survey results indicate that the Mid West Region as a whole is currently under-trading in all three broad categories of goods. This has been taken into account in the quantitative need assessment. If the amount of under-trading has been over-estimated then the need estimates will be higher, whilst if the amount of under-trading has been under-estimated then the levels of need will be lower.

RETAIL STRATEGY FOR THE MID WEST REGION 2010-2016

APPENDIX 6B

**The Need for Additional Non-Bulky
Comparison Goods Floorspace**

RETAIL FLOORSPACE NEED ASSESSMENT: NON BULKY COMPARISON GOODS (INCORPORATING ESTIMATES OF (ANY) UNDER / OVER TRADING AT THE BASE YEAR, 2009)	
CONTENTS	
TABLE 1 - POPULATION CHANGE BY ZONE	
TABLE 2 - EXPENDITURE ON NON BULKY COMPARISON GOODS PER HEAD OF POPULATION BY ZONE (INCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)	
TABLE 3 - EXPENDITURE ON NON BULKY COMPARISON GOODS PER HEAD OF POPULATION BY ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)	
TABLE 4 - TOTAL AVAILABLE NON BULKY COMPARISON GOODS BY EXPENDITURE ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)	
TABLE 5 - NON BULKY COMPARISON GOODS CENTRE MARKET SHARES BY ZONE IN THE BASE YEAR, 2009 (COLUMN PERCENT)	
TABLE 6 - ESTIMATED NON BULKY COMPARISON GOODS EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES IN THE BASE YEAR, 2009 (€MILLION)	
TABLE 7 - ADJUSTED NON BULKY COMPARISON GOODS CENTRE MARKET SHARES BY ZONE AT DESIGN YEARS (COLUMN PERCENT)	
TABLE 8 - NON BULKY GOODS COMPARISON EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES, 2016 (€ MILLION)	
TABLE 9 - CALCULATION OF POTENTIAL NON BULKY COMPARISON GOODS HEADROOM EXPENDITURE, 2016 (€MILLION)	
TABLE 10 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2016	
TABLE 11 - NON BULKY COMPARISON GOODS EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES, 2022 (€ MILLION)	
TABLE 12 - CALCULATION OF POTENTIAL NON BULKY COMPARISON GOODS HEADROOM EXPENDITURE, 2022 (€MILLION)	
TABLE 13 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2022	

TABLE 1 - POPULATION CHANGE BY ZONE					
Zone	2009 Population (Base Year)	2016 Population	2022 Population	Total Increase (2009-2022)	Percentage Increase (2009-2022)
Zone 1	21,836	26,652	30,779	8,943	41.0%
Zone 2	20,909	24,797	28,129	7,220	34.5%
Zone 3	19,365	24,034	28,035	8,670	44.8%
Zone 4	70,341	79,577	87,494	17,153	24.4%
Zone 5	36,887	40,208	43,055	6,168	16.7%
Zone 6	20,821	22,465	23,873	3,052	14.7%
Zone 7	46,016	49,864	53,162	7,146	15.5%
Zone 8	56,444	64,873	72,099	15,655	27.7%
Zone 9	12,796	14,188	15,381	2,585	20.2%
Zone 10	68,585	75,121	80,723	12,138	17.7%
Zone 11	46,472	51,811	54,786	8,314	17.7%
TOTAL	420,472	473,590	517,516	97,044	23.1%

Notes:

Population projections for zones 1 to 10 (within the Mid West Region) have been prepared by Limerick City Council, whilst the population projections for Zone 11 (South Tipperary, South East Region) is derived from CSO data (see Appendix 4A for full details).

TABLE 2 - EXPENDITURE ON NON BULKY COMPARISON GOODS PER HEAD OF POPULATION BY ZONE (INCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)						
Zone	Expenditure Per Head (€) ⁽¹⁾					
	2007	2009 (Base Year)	2016	2022	Increase (€) (2009-2022)	Increase % (2009-2022)
Zone 1	2,138	2,094	2,843	3,806	1,712	81.8%
Zone 2	2,138	2,094	2,843	3,806	1,712	81.8%
Zone 3	2,138	2,094	2,843	3,806	1,712	81.8%
Zone 4	2,138	2,094	2,843	3,806	1,712	81.8%
Zone 5	2,138	2,094	2,843	3,806	1,712	81.8%
Zone 6	2,138	2,094	2,843	3,806	1,712	81.8%
Zone 7	2,138	2,094	2,843	3,806	1,712	81.8%
Zone 8	2,138	2,094	2,843	3,806	1,712	81.8%
Zone 9	2,138	2,094	2,843	3,806	1,712	81.8%
Zone 10	2,138	2,094	2,843	3,806	1,712	81.8%
Zone 11	2,138	2,094	2,843	3,806	1,712	81.8%

Notes:

(1) Average consumer expenditure per head on non bulky comparison goods for 2007 has been estimated by Oxford Economics for the Mid West Region. The 2007 expenditure per head figures in each zone have been projected forwards to 2009 (the base year) and the forecast years of 2016 and 2022 by using expenditure per head growth rates for the Mid West produced by Oxford Economics for this Review (See Appendix 4B).

TABLE 3 - EXPENDITURE ON NON BULKY COMPARISON GOODS PER HEAD OF POPULATION BY ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)					
Zone	Expenditure Per Head (€) ⁽¹⁾				
	2009 (Base Year)	2016	2022	Increase (€) (2009-2022)	Increase % (2009-2022)
Zone 1	1,889	2,488	3,277	1,388	73.5%
Zone 2	1,889	2,488	3,277	1,388	73.5%
Zone 3	1,889	2,488	3,277	1,388	73.5%
Zone 4	1,889	2,488	3,277	1,388	73.5%
Zone 5	1,889	2,488	3,277	1,388	73.5%
Zone 6	1,889	2,488	3,277	1,388	73.5%
Zone 7	1,889	2,488	3,277	1,388	73.5%
Zone 8	1,889	2,488	3,277	1,388	73.5%
Zone 9	1,889	2,488	3,277	1,388	73.5%
Zone 10	1,889	2,488	3,277	1,388	73.5%
Zone 11	1,889	2,488	3,277	1,388	73.5%

Notes:

(1) Expenditure per head on non bulky comparison goods has been discounted by 9.8% (over the figures in Table 2) for the base year of 2009, to exclude non store retail sales which includes e-tailing. At 2016 and 2022, discounts of 12.5% and 13.9% have been assumed. The SFT percentages for the Mid West are based on research carried out by Experian in the UK but adjusted to reflect the retail economy of the region.

TABLE 4 - TOTAL AVAILABLE NON BULKY COMPARISON GOODS BY EXPENDITURE ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)					
Zone	Total Available Expenditure (€m) ⁽¹⁾				
	2009 (Base Year)	2016	2022	Increase (€) (2009-2022)	Increase % (2009-2022)
Zone 1	41.2	66.3	100.9	59.6	144.6%
Zone 2	39.5	61.7	92.2	52.7	133.4%
Zone 3	36.6	59.8	91.9	55.3	151.2%
Zone 4	132.9	198.0	286.7	153.9	115.8%
Zone 5	69.7	100.0	141.1	71.4	102.5%
Zone 6	39.3	55.9	78.2	38.9	98.9%
Zone 7	86.9	124.0	174.2	87.3	100.5%
Zone 8	106.6	161.4	236.3	129.7	121.6%
Zone 9	24.2	35.3	50.4	26.2	108.6%
Zone 10	129.5	186.9	264.5	135.0	104.2%
Zone 11	87.8	128.9	179.5	91.8	104.6%
TOTAL	794.2	1178.1	1696.0	901.8	113.6%

Notes:

(1) Total available expenditure totals for non bulky comparison goods are calculated as follows: Population (Table 1) multiplied by consumer expenditure per head after making appropriate reductions for SFT (Table 3).

TABLE 5 - NON BULKY COMPARISON GOODS CENTRE MARKET SHARES BY ZONE IN THE BASE YEAR, 2009 (COLUMN PERCENT)											
Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)										
	Survey Area										
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
WITHIN MID WEST											
Limerick - City Centre	59.6	60.3	59.6	76.9	40.4	15.4	51.3	6.1	8.3	9.2	6.2
Limerick - Rest of City	30.6	24.1	18.1	4.5	0.0	7.3	3.1	1.0	0.0	0.0	0.0
SUB TOTAL: LIMERICK CITY	90.1	84.4	77.7	81.3	40.4	22.7	53.2	7.1	8.3	9.2	6.2
Crescent Shopping Centre	6.2	10.5	17.2	15.7	13.4	38.8	13.0	11.6	8.2	10.9	11.5
Rest of Limerick - Suburbs (excludes City)	0.0	0.0	1.8	1.5	3.1	0.0	0.4	0.0	0.0	0.0	0.0
Rest of County	1.0	0.0	0.0	0.0	26.1	12.8	0.0	0.0	0.0	0.0	0.0
SUB TOTAL: LIMERICK COUNTY	7.2	10.5	19.0	17.2	42.6	51.6	13.4	11.6	8.2	10.9	11.5
Ennis	0.0	0.0	0.0	0.0	0.0	0.0	15.7	62.2	72.2	0.0	0.0
Shannon	0.0	0.0	0.0	0.0	0.0	0.0	5.7	2.0	0.0	0.0	0.0
Rest of County	0.0	0.0	0.0	0.0	0.0	0.0	6.6	12.3	1.6	0.0	0.0
SUB TOTAL: CLARE COUNTY	0.0	0.0	0.0	0.0	0.0	0.0	28.0	76.5	73.8	0.0	0.0
SUB TOTAL: NORTH TIPPERARY	0.0	0.0	0.0	0.0	0.0	0.0	2.3	0.0	0.0	69.4	10.9
SUB TOTAL: MID WEST	97.3	94.9	96.7	98.5	83.1	74.3	96.9	95.3	90.3	89.6	28.7
OUTSIDE MID WEST											
All Centres / Stores	2.7	5.1	3.3	1.5	16.9	25.7	3.1	4.7	9.7	10.4	71.3
SUB TOTAL	2.7	5.1	3.3	1.5	16.9	25.7	3.1	4.7	9.7	10.4	71.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Notes:

The market share percentages are derived from the household telephone survey carried out within the Mid West between 23 February and 8 March, 2009. A more detailed breakdown of market shares is given in Appendix 3E.

TABLE 6 - ESTIMATED NON BULKY COMPARISON GOODS EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES IN THE BASE YEAR, 2009 (€ MILLION)

Retail Supply: Where the Money is Spent		Consumer Demand: Where the Money Comes From (Zone)														Benchmark Average Sales Density (€ per sq.m net) ⁽³⁾	Benchmark Non Bulky Goods Turnover (€m)	Extent of Any Over / Under Trading (€m)			
		Study Area											TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-11)	Estimated Inflow Expenditure (Toursits) ⁽¹⁾				Total Non Bulky Goods Turnover	Non Bulky Goods Floorspace (sq.m. net) ⁽²⁾	Average Sales Density (€ per sq.m. net)
		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	A	B	C = A + B				D	E = C / D	F
WITHIN MID WEST																					
Limerick - City Centre		24.6	23.8	21.8	102.1	28.2	6.1	44.6	6.5	2.0	12.0	5.4		277.0	26.3	303.3	50,350	6,025	6,250	314.7	-11.3
Limerick - Rest of City		12.6	9.5	6.6	5.9	0.0	2.9	2.7	1.1	0.0	0.0	0.0		41.4	3.9	45.3	29,531	1,533	3,500	103.4	-58.1
SUB TOTAL: LIMERICK CITY		37.2	33.3	28.4	108.1	28.2	8.9	46.3	7.6	2.0	12.0	5.4		317.4	30.2	347.6	79,881	4,352	-	418.0	-70.4
Crescent Shopping Centre		2.6	4.2	6.3	20.8	9.3	15.3	11.3	12.4	2.0	14.2	10.1		108.4	10.4	118.8	17,595	6,752	6,500	114.4	4.4
Rest of Limerick - Suburbs (excludes City)		0.0	0.0	0.7	2.0	2.2	0.0	0.3	0.0	0.0	0.0	0.0		5.1	0.4	5.5	9,329	593	3,500	32.7	-27.1
Rest of County		0.4	0.0	0.0	0.0	18.2	5.0	0.0	0.0	0.0	0.0	0.0		23.6	2.2	25.8	16,833	1,535	3,000	50.5	-24.7
SUB TOTAL: LIMERICK COUNTY		3.0	4.2	7.0	22.8	29.7	20.3	11.6	12.4	2.0	14.2	10.1		137.2	13.0	150.2	43,757	3,432	-	197.5	-47.3
Ennis		0.0	0.0	0.0	0.0	0.0	0.0	13.6	66.4	17.4	0.0	0.0		97.4	25.6	123.0	13,783	8,927	5,000	68.9	54.1
Shannon		0.0	0.0	0.0	0.0	0.0	0.0	4.9	2.2	0.0	0.0	0.0		7.1	1.9	9.0	2,382	3,789	4,000	9.5	-0.5
Rest of County		0.0	0.0	0.0	0.0	0.0	0.0	5.7	13.1	0.4	0.0	0.0		19.2	4.9	24.1	8,519	2,828	3,000	25.6	-1.5
SUB TOTAL: CLARE COUNTY		0.0	0.0	0.0	0.0	0.0	0.0	24.3	81.6	17.8	0.0	0.0		123.8	32.4	156.2	24,684	6,326	-	104.0	52.2
NORTH TIPPERARY		0.0	0.0	0.0	0.0	0.0	0.0	2.0	0.0	0.0	89.9	9.6		101.5	3.6	105.1	30,689	3,426	3,500	107.4	-2.3
SUB TOTAL: MID WEST		40.1	37.5	35.4	130.9	57.9	29.2	84.2	101.6	21.8	116.1	25.2		679.9	79.2	759.1	179,011	4,240		827.0	-67.9
OUTSIDE MID WEST																					
All Centres / Stores		1.1	2.0	1.2	2.0	11.8	10.1	2.7	5.0	2.4	13.4	62.6									
SUB TOTAL		1.1	2.0	1.2	2.0	11.79	10.12	2.7	5.0	2.4	13.45	62.62									
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)		41.2	39.5	36.6	132.9	69.7	39.3	86.9	106.6	24.2	129.5	87.8									

Notes:
1) Estimated by Colliers CRE (Appendix 4C).
2) Floorspace estimates provided by the Councils (Appendix 5B).
3) Benchmark sales densities estimated by Colliers CRE (See Section 5 of main report).

TABLE 7 - ADJUSTED NON BULKY COMPARISON GOODS CENTRE MARKET SHARES BY ZONE AT DESIGN YEARS (COLUMN PERCENT)												
Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											
	Study Area											
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	
WITHIN MID WEST												
Limerick - City Centre	75.0	75.0	75.0	75.0	50.0	30.0	70.0	15.0	15.0	15.0	15.0	15.0
Limerick - Rest of City	19.5	16.0	10.2	5.0	0.0	5.0	1.5	0.8	0.0	0.0	0.0	0.0
SUB TOTAL: LIMERICK CITY	94.5	91.0	85.2	80.0	50.0	35.0	71.5	15.8	15.0	15.0	15.0	15.0
Crescent Shopping Centre	4.0	7.0	12.0	17.0	11.5	34.0	8.0	10.0	7.0	10.0	9.0	9.0
Rest of Limerick - Suburbs (excludes City)	0.0	0.0	1.0	1.5	2.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Rest of County	0.0	0.0	0.0	0.0	23.0	11.0	0.0	0.0	0.0	0.0	0.0	0.0
SUB TOTAL: LIMERICK COUNTY	4.0	7.0	13.0	18.5	37.0	45.0	8.0	10.0	7.0	10.0	9.0	9.0
Ennis	0.0	0.0	0.0	0.0	0.0	0.0	9.0	59.4	70.5	0.0	0.0	0.0
Shannon	0.0	0.0	0.0	0.0	0.0	0.0	4.5	1.8	0.0	0.0	0.0	0.0
Rest of County	0.0	0.0	0.0	0.0	0.0	0.0	5.0	11.0	1.5	0.0	0.0	0.0
SUB TOTAL: CLARE COUNTY	0.0	0.0	0.0	0.0	0.0	0.0	18.5	72.2	72.0	0.0	0.0	0.0
NORTH TIPPERARY	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0	0.0	67.0	8.9	8.9
SUB TOTAL: MID WEST	98.5	98.0	98.2	98.5	87.0	80.0	99.0	98.0	94.0	92.0	32.9	32.9
OUTSIDE MID WEST												
All Centres / Stores	1.5	2.0	1.8	1.5	13.0	20.0	1.0	2.0	6.0	8.0	67.1	67.1
SUB TOTAL	1.5	2.0	1.8	1.5	13.0	20.0	1.0	2.0	6.0	8.0	67.1	67.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Notes:												
The market shares in this table are adjusted upwards from those set out in Table 5 to reflect the planning aspirations to strengthen Limerick City Centre in retail terms.												

Notes:

The market shares in this table are adjusted upwards from those set out in Table 5 to reflect the planning aspirations to strengthen Limerick City Centre in retail terms.

TABLE 8 - NON BULKY GOODS COMPARISON EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES, 2016 (€ MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)														
	Study Area											TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-11)	Estimated Inflow Expenditure (Tourists) ⁽¹⁾	Total Non Bulky Goods Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11				
WITHIN MID WEST															
Limerick - City Centre	49.7	46.3	44.8	148.5	50.0	16.8	86.8	24.2	5.3	28.0	19.3	519.8	29.6		549.4
Limerick - Rest of City	12.9	9.9	6.1	9.9	0.0	2.8	1.9	1.3	0.0	0.0	0.0	44.7	4.4		49.1
SUB TOTAL : LIMERICK CITY	62.7	56.1	50.9	158.4	50.0	19.6	88.7	25.5	5.3	28.0	19.3	564.5	34.0		598.5
Crescent Shopping Centre	2.7	4.3	7.2	33.7	11.5	19.0	9.9	16.1	2.5	18.7	11.6	137.1	11.7		148.8
Rest of Limerick - Suburbs (excludes City)	0.0	0.0	0.6	3.0	2.5	0.0	0.0	0.0	0.0	0.0	0.0	6.1	0.5		6.6
Rest of County	0.0	0.0	0.0	0.0	23.0	6.1	0.0	0.0	0.0	0.0	0.0	29.2	2.5		31.7
SUB TOTAL : LIMERICK COUNTY	2.7	4.3	7.8	36.6	37.0	25.1	9.9	16.1	2.5	18.7	11.6	172.3	14.7		187.0
Ennis	0.0	0.0	0.0	0.0	0.0	0.0	11.2	95.9	24.9	0.0	0.0	131.9	28.8		160.7
Shannon	0.0	0.0	0.0	0.0	0.0	0.0	5.6	2.9	0.0	0.0	0.0	8.5	2.1		10.6
Rest of County	0.0	0.0	0.0	0.0	0.0	0.0	6.2	17.8	0.5	0.0	0.0	24.5	5.5		30.0
SUB TOTAL : CLARE COUNTY	0.0	0.0	0.0	0.0	0.0	0.0	22.9	116.5	25.4	0.0	0.0	164.9	36.4		201.3
NORTH TIPPERARY	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.0	125.2	11.5	137.9	4.1		142.0
SUB TOTAL : MID WEST	65.3	60.5	58.7	195.0	87.0	44.7	122.8	158.2	33.2	171.9	42.4	1039.6	89.2		1128.8
OUTSIDE MID WEST															
All Centres / Stores	1.0	1.2	1.1	3.0	13.0	11.2	1.2	3.2	2.1	14.9	86.5	138.5			
SUB TOTAL	1.0	1.2	1.1	3.0	13.0	11.2	1.2	3.2	2.1	14.9	86.5	138.5			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	66.3	61.7	59.8	198.0	100.0	55.9	124.0	161.4	35.3	186.9	128.9	1178.1			

Notes:

For each cell, the monetary figure is derived by multiplying the 2016 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the convenience goods market share of the specific centre.

(1) Estimated by Colliers CRE (see Appendix 4C).

TABLE 9 - CALCULATION OF POTENTIAL NON BULKY COMPARISON GOODS HEADROOM EXPENDITURE, 2016 (€MILLION)					
Centre	2009 Turnover	2016 Turnover Potential	Turnover Allocation for Existing Retailers 2009-2016	Residual Turnover Potential by 2016	Potential Headroom Expenditure by 2016
	A	B	C ⁽¹⁾	D = B - C	E = D - A
	(Table 6, C)	(Table 8, C)			
WITHIN MID WEST					
Limerick - City Centre	303.3	549.4	40.6	508.7	205.4
Limerick - Rest of City	45.3	49.1	13.3	35.8	-9.5
SUB TOTAL: LIMERICK CITY	347.6	598.5	54.0	544.5	196.9
Crescent Shopping Centre	118.8	148.8	14.8	134.1	15.2
Rest of Limerick - Suburbs (excludes City)	5.5	6.6	4.2	2.4	-3.2
Rest of County	25.8	31.7	6.5	25.1	-0.7
SUB TOTAL: LIMERICK COUNTY	150.2	187.0	25.5	161.5	11.4
Ennis	123.0	160.7	8.9	151.8	28.8
Shannon	9.0	10.6	1.2	9.4	0.3
Rest of County	24.1	30.0	3.3	26.7	2.6
SUB TOTAL: CLARE COUNTY	156.2	201.3	13.4	187.8	31.7
NORTH TIPPERARY	105.1	142.0	13.9	128.1	23.0
TOTAL: MID WEST	759.1	1,128.8	106.8	1,022.1	263.0
Notes: (1) We assume that all existing non bulky comparison goods floorspace at the base year (2009) will achieve a real sales productivity gain of 1.75% per annum. This figure is based on in-depth research carried out by Experian in the UK (See Section 5 in the main report), with an adjustment to reflect the retail economy of the Mid West and the planning aspirations of the Councils. The sales productivity gains are applied to the estimated 2009 benchmark non bulky goods turnover of each centre as set out in Table 6 (Column G).					

TABLE 10 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2016							
Centre	Potential Headroom Expenditure by 2016 (€m)	Adjustment for Over / Under Trading in Base Year (€m)	Adjusted Headroom Expenditure by 2016 (€m)	Reduction in Expenditure due to Non Bulky Goods Floorspace Commitments (as at March 2009) ⁽¹⁾	Adjusted Residual Headroom Expenditure by 2016 (€m)	Assumed Sales Density in 2016 ⁽²⁾ (€ per sq.m net)	Estimated Retail Floorspace Need in 2016 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 9, E)	(Table 6, H)					
WITHIN MID WEST							
Limerick - City Centre	205.4	-11.3	194.0	83.2	110.8	7,000	15,836
Limerick - Rest of City	-9.5	-58.1	-67.6	45.4	-113.0	7,000	-16,138
SUB TOTAL: LIMERICK CITY	196.9	-70.4	126.5	128.6	-2.1	-	-302
Crescent Shopping Centre	15.2	4.4	19.7	0.0	19.7	7,000	2,812
Rest of Limerick - Suburbs (excludes City)	-3.2	-27.1	-30.3	124.0	-154.3	7,000	-22,043
Rest of County	-0.7	-24.7	-25.4	0.0	-25.4	7,000	-3,624
SUB TOTAL: LIMERICK COUNTY	11.4	-47.3	-36.0	124.0	-160.0	-	-22,855
Ennis	28.8	54.1	82.9	7.2	75.7	7,000	10,813
Shannon	0.3	-0.5	-0.2	23.1	-23.3	7,000	-3,325
Rest of County	2.6	-1.5	1.1	38.2	-37.1	7,000	-5,296
SUB TOTAL: CLARE COUNTY	31.7	52.2	83.8	68.5	15.3	-	2,192
NORTH TIPPERARY	23.0	-2.3	20.7	116.9	-96.2	7,000	-13,738
TOTAL	263.0	-67.9	195.1	438.0	-242.9		-34,702

Notes:

(1) Details and estimated 2016 turnovers of non bulky comparison goods floorspace commitments by zone are set out in Appendix 5C.

(2) The derivation of our 2016 benchmark centre sales density estimates are set out in Section 5 of the main report.

TABLE 11 - NON BULKY COMPARISON GOODS EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES, 2022 (€MILLION)															
Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)														
	Study Area											TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-11)	Estimated Inflow Expenditure (Tourists) ⁽¹⁾	Total Non Bulky Goods Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	A	B	C = A + B	
WITHIN MID WEST															
Limerick - City Centre	75.7	69.2	68.9	215.0	70.6	23.5	121.9	35.4	7.6	39.7	26.9	754.3	33.4	787.7	
Limerick - Rest of City	19.7	14.8	9.4	14.3	0.0	3.9	2.6	1.9	0.0	0.0	0.0	66.5	5.0	71.5	
SUB TOTAL: LIMERICK CITY	95.4	83.9	78.3	229.4	70.6	27.4	124.6	37.3	7.6	39.7	26.9	820.9	38.4	859.3	
Crescent Shopping Centre	4.0	6.5	11.0	48.7	16.2	26.6	13.9	23.6	3.5	26.5	16.2	196.8	13.2	210.0	
Rest of Limerick - Suburbs (excludes City)	0.0	0.0	0.9	4.3	3.5	0.0	0.0	0.0	0.0	0.0	0.0	8.7	0.5	9.2	
Rest of County	0.0	0.0	0.0	0.0	32.5	8.6	0.0	0.0	0.0	0.0	0.0	41.1	2.8	43.9	
SUB TOTAL: LIMERICK COUNTY	4.0	6.5	11.9	53.0	52.2	35.2	13.9	23.6	3.5	26.5	16.2	246.6	16.5	263.1	
Ennis	0.0	0.0	0.0	0.0	0.0	0.0	15.7	140.4	35.5	0.0	0.0	191.6	32.5	224.1	
Shannon	0.0	0.0	0.0	0.0	0.0	0.0	7.8	4.3	0.0	0.0	0.0	12.1	2.4	14.5	
Rest of County	0.0	0.0	0.0	0.0	0.0	0.0	8.7	26.0	0.8	0.0	0.0	35.5	6.2	41.7	
SUB TOTAL: CLARE COUNTY	0.0	0.0	0.0	0.0	0.0	0.0	32.2	170.6	36.3	0.0	0.0	239.1	41.1	280.2	
NORTH TIPPERARY	0.0	0.0	0.0	0.0	0.0	0.0	1.7	0.0	0.0	177.2	16.0	194.9	4.6	199.5	
SUB TOTAL: MID WEST	99.4	90.4	90.2	282.4	122.8	62.6	172.5	231.6	47.4	243.3	59.1	1501.5	100.6	1602.1	
OUTSIDE MID WEST															
All Centres / Stores	1.5	1.8	1.7	4.3	18.3	15.6	1.7	4.7	3.0	21.2	120.5	194.4			
SUB TOTAL	1.5	1.8	1.7	4.3	18.3	15.6	1.7	4.7	3.0	21.2	120.5	194.4			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	100.9	92.2	91.9	286.7	141.1	78.2	174.2	236.3	50.4	264.5	179.5	1696.0			

Notes:

For each cell, the monetry figure is derived by multiplying the 2022 available non bulky comparison goods expenditure in the zone (excl. SFT) (Table 4) by non bulky comparison goods market share of the specific centre in that zone (Table 7).

(1) Estimated by Colliers CRE (see Appendix 4C).

TABLE 12 - CALCULATION OF POTENTIAL NON BULKY COMPARISON GOODS HEADROOM EXPENDITURE, 2022 (€MILLION)					
Centre	2009 Turnover	2022 Turnover Potential	Turnover Allocation for Existing Retailers 2009-2022	Residual Turnover Potential by 2022	Potential Headroom Expenditure by 2022
	A	B	C ⁽¹⁾	D = B - C	E = D - A
	(Table 6, C)	(Table 11, C)			
WITHIN MID WEST					
Limerick - City Centre	303.3	787.7	79.6	708.1	404.8
Limerick - Rest of City	45.3	71.5	26.1	45.4	0.1
SUB TOTAL: LIMERICK CITY	347.6	859.3	105.8	753.5	405.9
Crescent Shopping Centre	118.8	210.0	28.9	181.0	62.2
Rest of Limerick - Suburbs (excludes City)	5.5	9.2	8.3	1.0	-4.5
Rest of County	25.8	43.9	12.8	31.1	5.2
SUB TOTAL: LIMERICK COUNTY	150.2	263.1	50.0	213.1	62.9
Ennis	123.0	224.1	17.4	206.6	83.6
Shannon	9.0	14.5	2.4	12.1	3.1
Rest of County	24.1	41.7	6.5	35.2	11.1
SUB TOTAL: CLARE COUNTY	156.2	280.2	26.3	253.9	97.8
NORTH TIPPERARY	105.1	199.5	27.2	172.4	67.2
TOTAL	759.1	1,602.1	209.2	1,392.9	633.8

Notes:

(1) We assume that all existing non bulky comparison goods floorspace at the base year (2009) will achieve a real sales productivity gain of 1.75% per annum. This figure is based on in-depth research carried out by Experian in the UK (See Section 5 in the main report), with an adjustment to reflect the retail economy of the Mid West and the planning aspirations of the Councils. The sales productivity gains are applied to the estimated 2009 benchmark non-bulky comparison goods turnover for each centre as set out in Table 6 (column G).

TABLE 13 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2022							
Centre	Potential Headroom Expenditure by 2022 (€m)	Adjustment for Over / Under Trading in Base Year (€m)	Adjusted Headroom Expenditure by 2022 (€m)	Reduction in Expenditure due to Non Bulky Goods Floorspace Commitments (as at March 2009) ⁽¹⁾	Adjusted Residual Headroom Expenditure by 2021 (€m)	Assumed Sales Density in 2022 ⁽²⁾ (€ per sq.m net)	Estimated Retail Floorspace Need in 2022 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 12, E)	(Table 6, H)					
WITHIN MID WEST							
Limerick - City Centre	404.8	-11.3	393.4	92.3	301.1	7,768	38,766
Limerick - Rest of City	0.1	-58.1	-58.0	50.4	-108.4	7,768	-13,949
SUB TOTAL: LIMERICK CITY	405.9	-70.4	335.5	142.7	192.8	-	24,817
Crescent Shopping Centre	62.2	4.4	66.7	0.0	66.7	7,768	8,583
Rest of Limerick - Suburbs (excludes City)	-4.5	-27.1	-31.7	137.7	-169.4	7,768	-21,803
Rest of County	5.2	-24.7	-19.4	0.0	-19.4	7,768	-2,500
SUB TOTAL: LIMERICK COUNTY	62.9	-47.3	15.6	137.7	-122.1	-	-15,720
Ennis	83.6	54.1	137.7	8.0	129.7	7,768	16,700
Shannon	3.1	-0.5	2.6	25.6	-23.0	7,768	-2,967
Rest of County	11.1	-1.5	9.6	42.4	-32.8	7,768	-4,218
SUB TOTAL: CLARE COUNTY	97.8	52.2	149.9	76.0	73.9	-	9,515
NORTH TIPPERARY	67.2	-2.3	65.0	129.8	-64.8	7,768	-8,348
TOTAL	633.8	-67.9	565.9	486.2	79.7		10,264

Notes:

(1) Details and estimated 2022 turnovers of non bulky comparison goods floorspace commitments by zone are set out in Appendix 5C.

(2) The derivation of our 2022 benchmark centre sales density estimates are set out in Section 5 of the main report.

RETAIL STRATEGY FOR THE MID WEST REGION 2010-2016

APPENDIX 6C

**The Need for Additional Bulky Comparison
Goods Floorspace**

RETAIL FLOORSPACE NEED ASSESSMENT: BULKY COMPARISON GOODS (INCORPORATING ESTIMATES OF (ANY) UNDER / OVER TRADING AT THE BASE YEAR, 2009)	
CONTENTS	
TABLE 1 - POPULATION CHANGE BY ZONE	
TABLE 2 - EXPENDITURE ON BULKY COMPARISON GOODS PER HEAD OF POPULATION BY ZONE (INCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)	
TABLE 3 - EXPENDITURE ON BULKY COMPARISON GOODS PER HEAD OF POPULATION BY ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)	
TABLE 4 - TOTAL AVAILABLE BULKY COMPARISON GOODS EXPENDITURE BY ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)	
TABLE 5 - BULKY COMPARISON GOODS CENTRE MARKET SHARES BY ZONE IN THE BASE YEAR, 2009 (COLUMN PERCENT)	
TABLE 6 - ESTIMATED BULKY COMPARISON GOODS EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES IN THE BASE YEAR, 2009 (€ MILLION)	
TABLE 7 - BULKY COMPARISON GOODS CENTRE MARKET SHARES BY ZONE AT DESIGN YEARS (COLUMN PERCENT)	
TABLE 8 - BULKY COMPARISON GOODS EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES, 2016 (€ MILLION)	
TABLE 9 - CALCULATION OF POTENTIAL BULKY COMPARISON GOODS HEADROOM EXPENDITURE, 2016 (€ MILLION)	
TABLE 10 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2016	
TABLE 11 - BULKY COMPARISON GOODS EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES, 2022 (€ MILLION)	
TABLE 12 - CALCULATION OF POTENTIAL BULKY COMPARISON GOODS HEADROOM EXPENDITURE, 2022 (€ MILLION)	
TABLE 13 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2022	

TABLE 1 - POPULATION CHANGE BY ZONE					
Zone	2009 Population (Base Year)	2016 Population	2022 Population	Total Increase (2009-2022)	Percentage Increase (2009-2022)
Zone 1	21,836	26,652	30,779	8,943	41.0%
Zone 2	20,909	24,797	28,129	7,220	34.5%
Zone 3	19,365	24,034	28,035	8,670	44.8%
Zone 4	70,341	79,577	87,494	17,153	24.4%
Zone 5	36,887	40,208	43,055	6,168	16.7%
Zone 6	20,821	22,465	23,873	3,052	14.7%
Zone 7	46,016	49,864	53,162	7,146	15.5%
Zone 8	56,444	64,873	72,099	15,655	27.7%
Zone 9	12,796	14,188	15,381	2,585	20.2%
Zone 10	68,585	75,121	80,723	12,138	17.7%
Zone 11	46,472	51,811	54,786	8,314	17.7%
TOTAL	420,472	473,590	517,516	97,044	23.1%

Notes:

Population projections for zones 1 to 10 (within the Mid West Region) have been prepared by Limerick City Council, whilst the population projections for Zone 11 (South Tipperary, South East Region) is derived from CSO data (see Appendix 4A for full details).

TABLE 2 - EXPENDITURE ON BULKY COMPARISON GOODS PER HEAD OF POPULATION BY ZONE (INCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)

Zone	Expenditure Per Head (€) ⁽¹⁾					Increase % (2009-2022)
	2007	2009 (Base Year)	2016	2022	Increase (€) (2009-2022)	
Zone 1	831	827	1,154	1,585	758	91.7%
Zone 2	831	827	1,154	1,585	758	91.7%
Zone 3	831	827	1,154	1,585	758	91.7%
Zone 4	831	827	1,154	1,585	758	91.7%
Zone 5	831	827	1,154	1,585	758	91.7%
Zone 6	831	827	1,154	1,585	758	91.7%
Zone 7	831	827	1,154	1,585	758	91.7%
Zone 8	831	827	1,154	1,585	758	91.7%
Zone 9	831	827	1,154	1,585	758	91.7%
Zone 10	831	827	1,154	1,585	758	91.7%
Zone 11	831	827	1,154	1,585	758	91.7%

Notes:

1) Average consumer expenditure per head on bulky comparison goods for 2007 has been estimated in each zone have been projected forwards to 2009 (the base year) and the forecast years of 2016 and 2022 by using expenditure per head growth rates for the Mid West Region produced by Oxford Economics for this Review (see Appendix 4B).

TABLE 3 - EXPENDITURE ON BULKY COMPARISON GOODS PER HEAD OF POPULATION BY ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)					
Zone	Expenditure Per Head (€) ⁽¹⁾				
	2009 (Base Year)	2016	2022	Increase (€) (2009-2022)	Increase % (2009-2022)
Zone 1	746	1,010	1,365	619	83.0%
Zone 2	746	1,010	1,365	619	83.0%
Zone 3	746	1,010	1,365	619	83.0%
Zone 4	746	1,010	1,365	619	83.0%
Zone 5	746	1,010	1,365	619	83.0%
Zone 6	746	1,010	1,365	619	83.0%
Zone 7	746	1,010	1,365	619	83.0%
Zone 8	746	1,010	1,365	619	83.0%
Zone 9	746	1,010	1,365	619	83.0%
Zone 10	746	1,010	1,365	619	83.0%
Zone 11	746	1,010	1,365	619	83.0%

Notes:

(1) Expenditure per head on bulky comparison goods has been discounted by 9.8% (over the figures in Table 2) for the base year of 2009, to exclude non store retail sales which includes e-tailing. At 2016 and 2022, discounts of 12.50% and 13.90% have been assumed. The SFT percentages for the Mid West are derived from in-depth research carried out by Experian in the UK, but adjusted to reflect the retail economy of the region.

TABLE 4 - TOTAL AVAILABLE BULKY COMPARISON GOODS EXPENDITURE BY ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)					
Zone	Total Available Expenditure (€m) ⁽¹⁾				
	2009 (Base Year)	2016	2022	Increase (€) (2009-2022)	Increase % (2009-2022)
Zone 1	16.3	26.9	42.0	25.7	157.9%
Zone 2	15.6	25.0	38.4	22.8	146.2%
Zone 3	14.4	24.3	38.3	23.8	164.9%
Zone 4	52.5	80.4	119.4	67.0	127.6%
Zone 5	27.5	40.6	58.8	31.3	113.6%
Zone 6	15.5	22.7	32.6	17.1	109.8%
Zone 7	34.3	50.4	72.6	38.2	111.4%
Zone 8	42.1	65.5	98.4	56.3	133.7%
Zone 9	9.5	14.3	21.0	11.4	119.9%
Zone 10	51.2	75.9	110.2	59.0	115.4%
Zone 11	34.7	52.3	74.8	40.1	115.7%
TOTAL	313.7	478.2	706.4	392.7	125.2%

Notes:

(1) Total available expenditure totals for bulky comparison goods are calculated as follows: Population (Table 1) multiplied by consumer expenditure per head after making appropriate reductions for SFT (Table 3).

TABLE 5 - BULKY COMPARISON GOODS CENTRE MARKET SHARES BY ZONE IN THE BASE YEAR, 2009 (COLUMN PERCENT)												
Retail Supply: Where the Money is Spent		Consumer Demand: Where the Money Comes From (Zone)										
		Survey Area										
		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
WITHIN MID WEST												
Limerick - City Centre		20.3	18.0	37.1	57.1	24.2	17.4	21.9	2.7	1.1	4.6	2.4
Limerick - Rest of City		71.5	60.9	31.0	16.1	0.0	12.9	23.7	8.1	1.1	2.3	2.4
SUB TOTAL: LIMERICK CITY		91.8	78.9	68.1	73.2	24.2	30.4	45.6	10.8	2.2	6.9	4.9
Crescent Shopping Centre		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Rest of Limerick - Suburbs (excludes City)		6.6	21.1	31.9	26.8	6.5	9.7	15.2	1.4	5.5	1.2	7.3
Rest of County		0.0	0.0	0.0	0.0	56.5	30.7	0.0	0.0	0.0	0.0	0.0
SUB TOTAL: LIMERICK COUNTY		6.6	21.1	31.9	26.8	62.9	40.4	15.2	1.4	5.5	1.2	7.3
Ennis		0.0	0.0	0.0	0.0	0.0	0.0	10.1	68.9	86.8	0.0	0.0
Shannon		0.0	0.0	0.0	0.0	0.0	0.0	15.5	0.0	0.0	0.0	0.0
Rest of County		0.0	0.0	0.0	0.0	0.0	0.0	7.8	16.2	0.0	0.0	0.0
CLARE COUNTY		0.0	0.0	0.0	0.0	0.0	0.0	33.4	85.1	86.8	0.0	0.0
NORTH TIPPERARY		0.0	0.0	0.0	0.0	0.0	0.0	2.0	0.0	0.0	86.2	7.3
SUB TOTAL: MID WEST		98.4	100.0	100.0	100.0	87.1	70.8	96.1	97.3	94.5	94.3	19.5
OUTSIDE MID WEST												
All Centres / Stores		1.6	0.0	0.0	0.0	12.9	29.2	3.9	2.7	5.5	5.7	80.5
SUB TOTAL: OUTSIDE MID WEST		1.6	0.0	0.0	0.0	12.9	29.2	3.9	2.7	5.5	5.7	80.5
TOTAL		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Notes:

The market share percentages are derived from the household telephone survey carried out within the Mid West between 23 February and 8 March, 2009. A more detailed breakdown is given in Appendix 3E.

Notes:

The market share percentages are derived from the household telephone survey carried out within the Mid West between 23 February and 8 March, 2009. A more detailed breakdown is given in Appendix 3E.

TABLE 6 - ESTIMATED BULKY COMPARISON GOODS EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES IN THE BASE YEAR, 2009 (€MILLION)																															
Retail Supply: Where the Money is Spent										Consumer Demand: Where the Money Comes From (Zone)																					
										TOTAL HOUSEHOLD SURVEY AREA																					
										Survey Area																					
										Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11											
WITHIN MID WEST																															
Limerick - City Centre										3.3	2.8	5.4	30.0	6.7	2.7	7.5	1.1	0.1	2.4	0.8	62.8	62.8	0.0	62.8	8,837	7,104	4,500	39.8	23.0		
Limerick - Rest of City										11.7	9.5	4.5	8.4	0.0	2.0	8.1	3.4	0.1	1.2	0.8	49.7	49.7	0.0	49.7	25,296	1,967	2,500	63.2	-13.5		
SUB TOTAL: LIMERICK CITY										14.9	12.3	9.8	38.4	6.7	4.7	15.7	4.6	0.2	3.5	1.7	112.5	112.5	0.0	112.5	34,133	3,297	-	103.0	9.5		
Crescent Shopping Centre										0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Rest of Limerick - Suburbs (excludes City)										1.1	3.4	5.2	4.4	1.1	1.6	2.5	0.2	0.9	0.2	1.2	21.7	21.7	0.0	21.7	32,168	674	2,500	80.4	-58.7		
Rest of County										0.0	0.0	0.0	0.0	15.5	4.8	0.0	0.0	0.0	0.0	0.0	20.3	20.3	0.0	20.3	6,226	3,262	2,000	12.5	7.9		
SUB TOTAL: LIMERICK COUNTY										1.1	3.3	4.6	14.1	17.3	6.3	5.2	0.6	0.5	0.6	2.5	56.1	56.1	0.0	56.1	38,394	1,460	-	92.9	-36.8		
Ennis										0.0	0.0	0.0	0.0	0.0	0.0	3.5	29.0	8.3	0.0	0.0	40.8	40.8	0.0	40.8	26,040	1,565	2,500	65.1	-24.3		
Shannon										0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.3	0.0	0.0	0.0	5.3	5.3	0.0	5.3	5,054	1,051	2,250	11.4	-6.1		
Rest of County										0.0	0.0	0.0	0.0	0.0	0.0	2.7	6.8	0.0	0.0	0.0	9.5	9.5	0.0	9.5	959	9,904	2,000	1.9	7.6		
SUB TOTAL: CLARE COUNTY										0.0	0.0	0.0	0.0	0.0	0.0	11.5	35.8	8.3	0.0	0.0	55.6	55.6	0.0	55.6	32,053	1,734	-	78.4	-22.8		
SUB TOTAL: NORTH TIPPERARY										0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.0	44.1	2.5	47.3	47.3	0.0	47.3	29,462	1,606	2,250	66.3	-19.0		
SUB TOTAL: MID WEST										16.0	15.6	14.4	52.5	24.0	11.0	33.0	41.0	9.0	48.2	6.8	271.5	271.5	0.0	271.5	134,042	2,025		340.6	-69.1		
OUTSIDE MID WEST																															
All Centres / Stores										0.3	0.0	0.0	0.0	3.6	4.5	1.3	1.1	0.5	2.9	27.9	42.2										
SUB TOTAL										0.3	0.0	0.0	0.0	3.6	4.5	1.3	1.1	0.5	2.9	27.9	42.2										
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)										16.3	15.6	14.4	52.5	27.5	15.5	34.3	42.1	9.5	51.2	34.7											

Notes:

1) Estimated by Colliers CRE (Appendix 4C).

2) Floorspace estimates provided by the Councils (Appendix 5B).

3) Benchmark sales densities estimated by Colliers CRE (See Section 5 of main report).

Notes:

1) Estimated by Colliers CRE (Appendix 4C).

2) Floorspace estimates provided by the Councils (Appendix 5B).

3) Benchmark sales densities estimated by Colliers CRE (See Section 5 of main report).

TABLE 7 - BULKY COMPARISON GOODS CENTRE MARKET SHARES BY ZONE AT DESIGN YEARS (COLUMN PERCENT)											
Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)										
	Study Area										
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
WITHIN MID WEST											
Limerick - City Centre	20.3	18.0	37.1	57.1	24.2	17.4	21.9	2.7	1.1	4.6	2.4
Limerick - Rest of City	71.5	60.9	31.0	16.1	0.0	12.9	23.7	8.1	1.1	2.3	2.4
SUB TOTAL: LIMERICK CITY	91.8	78.9	68.1	73.2	24.2	30.4	45.6	10.8	2.2	6.9	4.9
Crescent Shopping Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Rest of Limerick - Suburbs (excludes City)	6.6	21.1	31.9	26.8	6.5	9.7	15.2	1.4	5.5	1.2	7.3
Rest of County	0.0	0.0	0.0	0.0	56.5	30.7	0.0	0.0	0.0	0.0	0.0
SUB TOTAL: LIMERICK COUNTY	6.6	21.1	31.9	26.8	62.9	40.4	15.2	1.4	5.5	1.2	7.3
Ennis	0.0	0.0	0.0	0.0	0.0	0.0	10.1	68.9	86.8	0.0	0.0
Shannon	0.0	0.0	0.0	0.0	0.0	0.0	15.5	0.0	0.0	0.0	0.0
Rest of County	0.0	0.0	0.0	0.0	0.0	0.0	7.8	16.2	0.0	0.0	0.0
CLARE COUNTY	0.0	0.0	0.0	0.0	0.0	0.0	33.4	85.1	86.8	0.0	0.0
NORTH TIPPERARY	0.0	0.0	0.0	0.0	0.0	0.0	2.0	0.0	0.0	86.2	7.3
SUB TOTAL: MID WEST	98.4	100.0	100.0	100.0	87.1	70.8	96.1	97.3	94.5	94.3	19.5
OUTSIDE MID WEST											
All Centres / Stores	1.6	0.0	0.0	0.0	12.9	29.2	3.9	2.7	5.5	5.7	80.5
SUB TOTAL	1.6	0.0	0.0	0.0	12.9	29.2	3.9	2.7	5.5	5.7	80.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Notes:

The market shares in this table are the same as those set out in Table 5.

Notes:
The market shares in this table are the same as those set out in Table 5.

TABLE 8 - NON BULKY GOODS COMPARISON EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES, 2016 (€ MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)													Total Non Bulky Goods Turnover	
	Study Area											TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-11)		Estimated Inflow Expenditure (Tourists) ⁽¹⁾
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11				
WITHIN MID WEST															
Limerick - City Centre	49.7	46.3	44.8	148.5	50.0	16.8	86.8	24.2	5.3	28.0	19.3	519.8	29.6	549.4	
Limerick - Rest of City	12.9	9.9	6.1	9.9	0.0	2.8	1.9	1.3	0.0	0.0	0.0	44.7	4.4	49.1	
SUB TOTAL : LIMERICK CITY	62.7	56.1	50.9	158.4	50.0	19.6	88.7	25.5	5.3	28.0	19.3	564.5	34.0	598.5	
Crescent Shopping Centre	2.7	4.3	7.2	33.7	11.5	19.0	9.9	16.1	2.5	18.7	11.6	137.1	11.7	148.8	
Rest of Limerick - Suburbs (excludes City)	0.0	0.0	0.6	3.0	2.5	0.0	0.0	0.0	0.0	0.0	0.0	6.1	0.5	6.6	
Rest of County	0.0	0.0	0.0	0.0	23.0	6.1	0.0	0.0	0.0	0.0	0.0	29.2	2.5	31.7	
SUB TOTAL : LIMERICK COUNTY	2.7	4.3	7.8	36.6	37.0	25.1	9.9	16.1	2.5	18.7	11.6	172.3	14.7	187.0	
Ennis	0.0	0.0	0.0	0.0	0.0	0.0	11.2	95.9	24.9	0.0	0.0	131.9	28.8	160.7	
Shannon	0.0	0.0	0.0	0.0	0.0	0.0	5.6	2.9	0.0	0.0	0.0	8.5	2.1	10.6	
Rest of County	0.0	0.0	0.0	0.0	0.0	0.0	6.2	17.8	0.5	0.0	0.0	24.5	5.5	30.0	
SUB TOTAL : CLARE COUNTY	0.0	0.0	0.0	0.0	0.0	0.0	22.9	116.5	25.4	0.0	0.0	164.9	36.4	201.3	
NORTH TIPPERARY	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.0	125.2	11.5	137.9	4.1	142.0	
SUB TOTAL : MID WEST	65.3	60.5	58.7	195.0	87.0	44.7	122.8	158.2	33.2	171.9	42.4	1039.6	89.2	1128.8	
OUTSIDE MID WEST															
All Centres / Stores	1.0	1.2	1.1	3.0	13.0	11.2	1.2	3.2	2.1	14.9	86.5	138.5			
SUB TOTAL	1.0	1.2	1.1	3.0	13.0	11.2	1.2	3.2	2.1	14.9	86.5	138.5			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	66.3	61.7	59.8	198.0	100.0	55.9	124.0	161.4	35.3	186.9	128.9	1178.1			

Notes:

For each cell, the monetary figure is derived by multiplying the 2016 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the convenience goods market share of the specific centre.

(1) Estimated by Colliers CRE (see Appendix 4C).

TABLE 9 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2016 (€ MILLION)					
Centre	2009 Turnover	2016 Turnover Potential	Turnover Allocation for Existing Retailers 2009-2016	Residual Turnover Potential by 2016	Potential Headroom Expenditure by 2016
	A	B	C ⁽¹⁾	D = B - C	E = D - A
	(Table 6, C)	(Table 8, C)			
WITHIN MID WEST					
Limerick - City Centre	25.4	31.9	2.4	29.5	4.0
Limerick - Rest of City	236.0	289.6	8.1	281.5	45.5
SUB TOTAL: LIMERICK CITY	261.4	321.5	10.5	311.0	49.5
Crescent Shopping Centre (Tesco)	59.7	72.1	3.8	68.4	8.7
Rest of Limerick - Suburbs (excludes City)	65.8	78.6	4.2	74.4	8.5
Rest of County	108.4	124.6	3.5	121.1	12.7
SUB TOTAL: LIMERICK COUNTY	233.9	275.3	11.5	263.8	29.9
Ennis	155.4	186.9	4.0	182.9	27.5
Shannon	20.7	23.7	0.7	22.9	2.2
Rest of County	61.7	72.9	3.2	69.7	8.0
SUB TOTAL: CLARE COUNTY	237.8	283.5	8.0	275.5	37.7
NORTH TIPPERARY	177.5	205.6	7.7	197.9	20.4
SUB TOTAL : MID WEST	910.6	1,085.9	37.7	1,048.2	137.5

Notes:

(1) We assume that all existing convenience goods floorspace at the base year (2009) will achieve a real sales productivity gain of 0.5% per annum. This figure is based on in-depth research carried out by Experian in the UK (see Section 5 in the main report), with an adjustment to reflect the retail economy of the Mid West and the planning aspirations of the Councils. The sales productivity gains are applied to the estimated 2009 benchmark convenience goods turnovers of each centre as set out in Table 6 (Column G).

TABLE 10 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2016							
Centre	Potential Headroom Expenditure by 2016 (€m)	Adjustment for Over / Under Trading in Base Year (€m)	Adjusted Headroom Expenditure by 2016 (€m)	Reduction in Expenditure due to Bulky Goods Floorspace Commitments (as at March 2009) ⁽¹⁾	Adjusted Residual Headroom Expenditure by 2016 (€m)	Assumed Sales Density in 2016 ⁽²⁾ (£ per sq.m net)	Estimated Retail Floorspace Need in 2016 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 9, E)	(Table 6, H)					
Limerick - City Centre	28.5	23.0	51.5	0.0	51.5	4,000	12,868
Limerick - Rest of City	20.4	-13.5	6.9	9.2	-2.3	4,000	-578
SUB TOTAL: LIMERICK CITY	48.8	9.5	58.4	9.2	49.2	-	12,291
Crescent Shopping Centre	0.0	0.0	0.0	0.0	0.0	4,000	0
Rest of Limerick - Suburbs (excludes City)	23.1	-58.7	-35.6	45.8	-81.4	4,000	-20,358
Rest of County	8.0	7.9	15.8	0.0	15.8	4,000	3,960
SUB TOTAL: LIMERICK COUNTY	17.0	-36.8	-19.8	45.8	-65.6	-	-16,399
Ennis	13.5	-24.3	-10.9	2.6	-13.5	4,000	-3,367
Shannon	1.0	-6.1	-5.1	0.0	-5.1	4,000	-1,263
Rest of County	4.8	7.6	12.4	22.9	-10.5	4,000	-2,632
SUB TOTAL: CLARE COUNTY	19.3	-22.8	-3.6	25.5	-29.0	-	-7,261
NORTH TIPPERARY	14.3	-19.0	-4.6	34.9	-39.5	4,000	-9,885
TOTAL	99.5	-69.1	30.4	115.4	-85.0		-21,255

Notes:
 (1) Details and estimated 2016 turnovers of bulky comparison goods floorspace commitments are set out in Appendix 5C.
 (2) The derivation of our 2016 benchmark centre sales density estimates are set out in Section 5 of the main report.

TABLE 11 - BULKY COMPARISON GOODS EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES, 2022 (€ MILLION)

Consumer Demand: Where the Money Comes From (Zone)															
Retail Supply: Where the Money is Spent	Study Area											TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-11)	Estimated Inflow Expenditure (Day Trippers) (1)	Total Bulky Goods Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11				
WITHIN MID WEST															
Limerick - City Centre	8.5	6.9	14.2	68.2	14.2	5.7	15.9	2.7	0.2	5.1	1.8	143.4	143.4	0.0	143.4
Limerick - Rest of City	30.0	23.4	11.9	19.2	0.0	4.2	17.2	8.0	0.2	2.5	1.8	118.5	118.5	0.0	118.5
SUB TOTAL: LIMERICK CITY	38.5	30.3	26.1	87.4	14.2	9.9	33.1	10.6	0.5	7.6	3.6	261.9	261.9	-	261.9
Crescent Shopping Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Rest of Limerick - Suburbs (excludes City)	2.8	8.1	12.2	32.0	3.8	3.2	11.0	1.3	1.2	1.3	5.5	82.3	82.3	0.0	82.3
Rest of County	0.0	0.0	0.0	0.0	33.2	10.0	0.0	0.0	0.0	0.0	0.0	43.2	43.2	0.0	43.2
SUB TOTAL: LIMERICK COUNTY	2.8	8.1	12.2	32.0	37.0	13.2	11.0	1.3	1.2	1.3	5.5	125.5	125.5	-	125.5
Ennis	0.0	0.0	0.0	0.0	0.0	0.0	7.3	67.8	18.2	0.0	0.0	93.3	93.3	0.0	93.3
Shannon	0.0	0.0	0.0	0.0	0.0	0.0	11.2	0.0	0.0	0.0	0.0	11.2	11.2	0.0	11.2
Rest of County	0.0	0.0	0.0	0.0	0.0	0.0	5.7	15.9	0.0	0.0	0.0	21.6	21.6	0.0	21.6
SUB TOTAL: CLARE COUNTY	0.0	0.0	0.0	0.0	0.0	0.0	24.2	83.8	18.2	0.0	0.0	126.2	126.2	-	126.2
NORTH TIPPERARY	0.0	0.0	0.0	0.0	0.0	0.0	1.4	0.0	0.0	95.0	5.5	101.9	101.9	0.0	101.9
SUB TOTAL: MID WEST	41.3	38.4	38.3	119.4	51.2	23.1	69.8	95.7	19.9	103.9	14.6	615.6	615.6	0.0	615.5
OUTSIDE MID WEST															
All Centres / Stores	0.7	0.0	0.0	0.0	7.6	9.5	2.8	2.7	1.1	6.3	60.2				
SUB TOTAL	0.7	0.0	0.0	0.0	7.6	9.5	2.8	2.7	1.1	6.3	60.2	90.9			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	42.0	38.4	38.3	119.4	58.8	32.6	72.6	98.4	21.0	110.2	74.8	706.5			

Notes:

For each cell, the monetary figure is derived by multiplying the 2022 available bulky comparison goods expenditure in the zone (excl. SFT) (Table 4) by bulky comparison goods market share of the specific centre in that zone.

(1) Estimated by Colliers CRE (Appendix 4C).

TABLE 12 - CALCULATION OF POTENTIAL BULKY COMPARISON GOODS HEADROOM EXPENDITURE, 2022 (€MILLION)					
Centre	2009 Turnover	2022 Turnover Potential	Turnover Allocation for Existing Retailers 2009-2022	Residual Turnover Potential by 2022	Potential Headroom Expenditure by 2022
	A	B	C ⁽¹⁾	D = B - C	E = D - A
	(Table 6, C)	(Table 11, C)			
Limerick - City Centre	62.8	143.4	10.1	133.4	70.6
Limerick - Rest of City	49.7	118.5	16.0	102.5	52.7
SUB TOTAL: LIMERICK CITY	112.5	261.9	26.1	235.9	123.4
Crescent Shopping Centre	0.0	0.0	0.0	0.0	0.0
Rest of Limerick - Suburbs (excludes City)	21.7	82.3	20.3	61.9	40.3
Rest of County	20.3	43.2	3.2	40.1	19.8
SUB TOTAL: LIMERICK COUNTY	56.1	125.5	23.5	102.0	46.0
Ennis	40.8	93.3	16.5	76.9	36.1
Shannon	5.3	11.2	2.9	8.4	3.0
Rest of County	9.5	21.6	0.5	21.1	11.6
SUB TOTAL: CLARE COUNTY	55.6	126.2	19.8	106.3	50.8
NORTH TIPPERARY	47.3	101.9	16.8	85.1	37.8
TOTAL	271.5	615.5	86.2	529.4	257.9

Notes:

(1) We assume that all existing bulky comparison goods floorspace at the base year (2009) will achieve a real sales productivity gain of 1.75% per annum. This figure is based on in-depth research carried out by Experian in the UK (see Section 5 in the main report), with an adjustment to reflect the retail economy of the Mid West and the planning aspirations of the Councils. The sales productivity gains are applied to the estimated 2009 benchmark bulky comparison goods turnovers of each centre as set out in Table 6 (Column G).

TABLE 13 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2022							
Centre	Potential Headroom Expenditure by 2022 (€m)	Adjustment for Over / Under Trading in Base Year (€m)	Adjusted Headroom Expenditure by 2022 (€m)	Reduction in Expenditure due to Bulky Goods Floorspace Commitments (as at March 2009) ⁽¹⁾	Adjusted Residual Headroom Expenditure by 2022 (€m)	Assumed Sales Density in 2022 ⁽²⁾ (€ per sq.m net)	Estimated Retail Floorspace Need in 2022 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 12, E)	(Table 6, H)					
Limerick - City Centre	70.6	23.0	93.6	0.0	93.6	4,439	21,090
Limerick - Rest of City	52.7	-13.5	39.2	10.2	29.0	4,439	6,544
SUB TOTAL: LIMERICK CITY	123.4	9.5	132.9	10.2	122.7	-	27,634
Crescent Shopping Centre	0.0	0.0	0.0	0.0	0.0	4,439	0
Rest of Limerick - Suburbs (excludes City)	40.3	-58.7	-18.5	50.8	-69.3	4,439	-15,606
Rest of County	19.8	7.9	27.6	0.0	27.6	4,439	6,222
SUB TOTAL: LIMERICK COUNTY	46.0	-36.8	9.1	50.8	-41.7	-	-9,384
Ennis	36.1	-24.3	11.8	2.9	8.9	4,439	1,997
Shannon	3.0	-6.1	-3.0	0.0	-3.0	4,439	-680
Rest of County	11.6	7.6	19.2	25.5	-6.3	4,439	-1,419
SUB TOTAL: CLARE COUNTY	50.8	-22.8	27.9	28.4	-0.5	-	-102
NORTH TIPPERARY	37.8	-19.0	18.8	38.8	-20.0	4,439	-4,497
TOTAL	257.9	-69.1	188.8	128.2	60.6		13,651

Notes:
 (1) Details and estimated 2022 turnovers of bulky comparison goods floorspace commitments are set out in Appendix 5C.
 (2) The derivation of our 2022 benchmark centre sales density estimates are set out in Section 5 in the main report.

RETAIL STRATEGY FOR THE MID WEST REGION 2010-2016

APPENDIX 6D

**The Need for Additional Convenience
Goods Floorspace**

RETAIL FLOORSPACE NEED ASSESSMENT: CONVENIENCE GOODS (INCORPORATING ESTIMATES OF (ANY) UNDER / OVER TRADING AT THE BASE YEAR, 2009)	
CONTENTS	
TABLE 1 - POPULATION CHANGE BY ZONE	
TABLE 2 - EXPENDITURE ON CONVENIENCE GOODS PER HEAD OF POPULATION BY ZONE (INCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)	
TABLE 3 - EXPENDITURE ON CONVENIENCE GOODS PER HEAD OF POPULATION BY ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)	
TABLE 4 - TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE BY ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)	
TABLE 5 - CONVENIENCE GOODS CENTRE MARKET SHARES BY ZONE IN THE BASE YEAR, 2009 (COLUMN PERCENT)	
TABLE 6 - ESTIMATED CONVENIENCE GOODS EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES IN THE BASE YEAR, 2009 (€ MILLION)	
TABLE 7 - CONVENIENCE GOODS CENTRE MARKET SHARES BY ZONE AT DESIGN YEARS (COLUMN PERCENT)	
TABLE 8 - CONVENIENCE GOODS EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES, 2016 (€ MILLION)	
TABLE 9 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2016 (€ MILLION)	
TABLE 10 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2016	
TABLE 11 - CONVENIENCE GOODS EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES, 2022 (€ MILLION)	
TABLE 12 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2022 (€ MILLION)	
TABLE 13 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2022	

TABLE 1 - POPULATION CHANGE BY ZONE					
Zone	2009 Population (Base Year)	2016 Population	2022 Population	Total Increase (2009-2022)	Percentage Increase (2009-2022)
Zone 1	21,836	26,652	30,779	8,943	41.0%
Zone 2	20,909	24,797	28,129	7,220	34.5%
Zone 3	19,365	24,034	28,035	8,670	44.8%
Zone 4	70,341	79,577	87,494	17,153	24.4%
Zone 5	36,887	40,208	43,055	6,168	16.7%
Zone 6	20,821	22,465	23,873	3,052	14.7%
Zone 7	46,016	49,864	53,162	7,146	15.5%
Zone 8	56,444	64,873	72,099	15,655	27.7%
Zone 9	12,796	14,188	15,381	2,585	20.2%
Zone 10	68,585	75,121	80,723	12,138	17.7%
Zone 11	46,472	51,811	54,786	8,314	17.7%
TOTAL	420,472	473,590	517,516	97,044	23.1%

Notes:

Population projections for zones 1 to 10 (within the Mid West Region) have been prepared by Limerick City Council, whilst the population projections for Zone 11 (South Tipperary, South East Region) is derived from CSO data (see Appendix 4A for full details).

TABLE 2 - EXPENDITURE ON CONVENIENCE GOODS PER HEAD OF POPULATION BY ZONE (INCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)						
Zone	2007	Expenditure Per Head (€) (1)				Increase % (2009-2022)
		2009 (Base Year)	2016	2022	Increase (€) (2009-2022)	
Zone 1	2,768	2,624	2,836	2,975	351	13.4%
Zone 2	2,768	2,624	2,836	2,975	351	13.4%
Zone 3	2,768	2,624	2,836	2,975	351	13.4%
Zone 4	2,768	2,624	2,836	2,975	351	13.4%
Zone 5	2,768	2,624	2,836	2,975	351	13.4%
Zone 6	2,768	2,624	2,836	2,975	351	13.4%
Zone 7	2,768	2,624	2,836	2,975	351	13.4%
Zone 8	2,768	2,624	2,836	2,975	351	13.4%
Zone 9	2,768	2,624	2,836	2,975	351	13.4%
Zone 10	2,768	2,624	2,836	2,975	351	13.4%
Zone 11	2,768	2,624	2,836	2,975	351	13.4%

Notes:

1) Average consumer expenditure per head on convenience goods for 2007 has been estimated by Oxford Economics for the Mid West Region. The 2007 expenditure per head figures in each zone have then been projected forwards to 2009 (the base year) and the forecast years of 2016 and 2022 by using expenditure per head growth rates for the Mid West produced by Oxford Economics for this Review (see Appendix 4B).

TABLE 3 - EXPENDITURE ON CONVENIENCE GOODS PER HEAD OF POPULATION BY ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)					
Zone	Expenditure Per Head (€) ⁽¹⁾				
	2009 (Base Year)	2016	2022	Increase (€) (2009-2022)	Increase % (2009-2022)
Zone 1	2,488	2,629	2,734	246	9.9%
Zone 2	2,488	2,629	2,734	246	9.9%
Zone 3	2,488	2,629	2,734	246	9.9%
Zone 4	2,488	2,629	2,734	246	9.9%
Zone 5	2,488	2,629	2,734	246	9.9%
Zone 6	2,488	2,629	2,734	246	9.9%
Zone 7	2,488	2,629	2,734	246	9.9%
Zone 8	2,488	2,629	2,734	246	9.9%
Zone 9	2,488	2,629	2,734	246	9.9%
Zone 10	2,488	2,629	2,734	246	9.9%
Zone 11	2,488	2,629	2,734	246	9.9%

Notes:

(1) Expenditure per head on convenience goods has been discounted by 5.2% (over the figures in Table 2) for the base year of 2009, to exclude non store retail sales which includes e-tailing. At 2016 and 2022, discounts of 7.3% and 8.1% have been assumed. The SFT percentages for the Mid West are based on in-depth research carried out by Experian in the UK, but adjusted to reflect the retail economy of the region.

TABLE 4 - TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE BY ZONE <u>(EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)</u>					
Zone	Total Available Expenditure (€m) ⁽¹⁾				
	2009 (Base Year)	2016	2022	Increase (€) (2009-2022)	Increase % (2009-2022)
Zone 1	54.3	70.1	84.2	29.8	54.9%
Zone 2	52.0	65.2	76.9	24.9	47.9%
Zone 3	48.2	63.2	76.6	28.5	59.1%
Zone 4	175.0	209.2	239.2	64.2	36.7%
Zone 5	91.8	105.7	117.7	26.0	28.3%
Zone 6	51.8	59.1	65.3	13.5	26.0%
Zone 7	114.5	131.1	145.3	30.9	27.0%
Zone 8	140.4	170.5	197.1	56.7	40.4%
Zone 9	31.8	37.3	42.1	10.2	32.1%
Zone 10	170.6	197.5	220.7	50.1	29.4%
Zone 11	115.6	136.2	149.8	34.2	29.6%
TOTAL	1045.9	1245.1	1414.9	369.0	35.3%

Notes:

(1) Total available expenditure totals for convenience goods are calculated as follows: Population (Table 1) multiplied by consumer expenditure after making appropriate reductions for SFT (Table 3).

TABLE 5 - CONVENIENCE GOODS CENTRE MARKET SHARES BY ZONE IN THE BASE YEAR, 2009 (COLUMN PERCENT)

Retail Supply: Where the Money is Spent		Consumer Demand: Where the Money Comes From (Zone)										
		Survey Area										
		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
WITHIN MID WEST												
Limerick - City Centre		0.9	14.9	18.5	4.5	0.0	0.5	0.0	0.0	0.0	0.0	0.0
Limerick - Rest of City		97.6	67.0	64.3	31.7	2.8	10.0	45.0	0.0	0.0	0.0	0.0
SUB TOTAL: LIMERICK CITY		98.5	81.9	82.8	36.2	2.8	10.4	45.0	0.0	0.0	0.0	0.0
Crescent Shopping Centre (Tesco)		0.0	0.3	14.6	28.9	1.3	0.0	0.0	0.0	0.6	0.0	0.0
Rest of Limerick - Suburbs (excludes City)		0.9	2.3	0.5	32.9	2.6	6.6	0.0	0.0	0.0	0.0	0.0
Rest of County		0.0	0.0	2.0	0.0	88.0	49.4	0.0	0.0	0.0	0.0	0.0
SUB TOTAL: LIMERICK COUNTY		0.9	2.6	17.1	61.7	91.9	55.9	0.0	0.0	0.6	0.0	0.0
Ennis		0.0	0.0	0.0	0.0	0.0	0.0	11.6	86.5	57.9	0.0	0.0
Shannon		0.0	0.0	0.0	0.0	0.0	1.0	17.4	0.0	0.0	0.0	0.0
Rest of County		0.0	13.7	0.0	0.0	0.0	0.0	20.7	13.2	35.9	0.0	0.0
SUB TOTAL: CLARE COUNTY		0	13.7	0	0	0	1.0	49.7	99.6	93.8	0	0
NORTH TIPPERARY		0	0	0	0	0	0	0	0	0	98.8	7.3
SUB TOTAL: MID WEST		99.4	98.2	99.9	98.0	94.7	67.4	94.7	99.6	94.4	98.8	7.3
OUTSIDE MID WEST REGION												
All Centres / Stores		0.6	1.8	0.1	2.0	5.3	32.6	5.3	0.4	5.6	1.2	92.7
SUB TOTAL		0.6	1.8	0.1	2.0	5.3	32.6	5.3	0.4	5.6	1.2	92.7
TOTAL		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Notes:

The market share percentages are derived from the household telephone survey carried out in the Mid West between 23 February and 8 March 2009. A more detailed breakdown of the market shares is set out in Appendix 3E.

TABLE 7 - CONVENIENCE GOODS CENTRE MARKET SHARES BY ZONE AT DESIGN YEARS (COLUMN PERCENT)												
Retail Supply: Where the Money is Spent		Consumer Demand: Where the Money Comes From (Zone)										
		Study Area										
		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
WITHIN MID WEST												
Limerick - City Centre		0.9	14.9	18.5	4.5	0.0	0.5	0.0	0.0	0.0	0.0	0.0
Limerick - Rest of City		97.6	67.0	64.3	31.7	2.8	10.0	45.0	0.0	0.0	0.0	0.0
SUB TOTAL: LIMERICK CITY		98.5	81.9	82.8	36.2	2.8	10.4	45.0	0.0	0.0	0.0	0.0
Crescent Shopping Centre (Tesco)		0.0	0.3	14.6	28.9	1.3	0.0	0.0	0.0	0.6	0.0	0.0
Rest of Limerick - Suburbs (excludes City)		0.9	2.3	0.5	32.9	2.6	6.6	0.0	0.0	0.0	0.0	0.0
Rest of County		0.0	0.0	2.0	0.0	88.0	49.4	0.0	0.0	0.0	0.0	0.0
SUB TOTAL: LIMERICK COUNTY		0.9	2.6	17.1	61.7	91.9	55.9	0.0	0.0	0.6	0.0	0.0
Ennis		0.0	0.0	0.0	0.0	0.0	0.0	11.6	86.5	57.9	0.0	0.0
Shannon		0.0	0.0	0.0	0.0	0.0	1.0	17.4	0.0	0.0	0.0	0.0
Rest of County		0.0	13.7	0.0	0.0	0.0	0.0	20.7	13.2	35.9	0.0	0.0
SUB TOTAL: CLARE COUNTY		0	13.7	0	0	0	1.0	49.7	99.6	93.8	0	0
NORTH TIPPERARY		0	0	0	0	0	0	0	0	0	98.8	7.3
SUB TOTAL: MID WEST		99.4	98.2	99.9	98.0	94.7	67.4	94.7	99.6	94.4	98.8	7.3
OUTSIDE MID WEST												
All Centres / Stores		0.6	1.8	0.1	2.0	5.3	32.6	5.3	0.4	5.6	1.2	92.7
SUB TOTAL		0.6	1.8	0.1	2.0	5.3	32.6	5.3	0.4	5.6	1.2	92.7
TOTAL		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Notes:

The market shares in this table are the same as those set out in Table 5.

TABLE 8 - CONVENIENCE GOODS EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES, 2016 (€ MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)														
	Study Area											TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-11)	Estimated Inflow Expenditure (Tourists) ⁽¹⁾	Total Convenience Goods Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11				
WITHIN MID WEST															
Limerick - City Centre	0.6	9.7	11.7	9.4	0.0	0.3	0.0	0.0	0.0	0.0	0.0	31.7	31.7	0.2	31.9
Limerick - Rest of City	68.4	43.7	40.6	66.4	3.0	5.9	59.0	0.0	0.0	0.0	0.0	287.0	287.0	2.6	289.6
SUB TOTAL: LIMERICK CITY	69.0	53.4	52.3	75.8	3.0	6.2	59.0	0.0	0.0	0.0	0.0	318.7	318.7	2.8	321.5
Crescent Shopping Centre (Tesco)	0.0	0.2	9.2	60.4	1.4	0.0	0.0	0.0	0.2	0.0	0.0	71.4	71.4	0.7	72.1
Rest of Limerick - Suburbs (excludes City)	0.7	1.5	0.3	68.7	2.8	3.9	0.0	0.0	0.0	0.0	0.0	77.9	77.9	0.7	78.6
Rest of County	0.0	0.0	1.3	0.0	93.0	29.2	0.0	0.0	0.0	0.0	0.0	123.4	123.4	1.2	124.6
SUB TOTAL: LIMERICK COUNTY	0.7	1.7	10.8	129.2	97.1	33.0	0.0	0.0	0.2	0.0	0.0	272.7	272.7	2.6	275.3
Ennis	0.0	0.0	0.0	0.0	0.0	0.0	15.2	147.5	21.6	0.0	0.0	184.3	184.3	2.6	186.9
Shannon	0.0	0.0	0.0	0.0	0.0	0.6	22.8	0.0	0.0	0.0	0.0	23.4	23.4	0.3	23.7
Rest of County	0.0	8.9	0.0	0.0	0.0	0.0	27.1	22.4	13.4	0.0	0.0	71.8	71.8	1.1	72.9
SUB TOTAL: CLARE COUNTY	0.0	8.9	0.0	0.0	0.0	0.6	65.1	169.9	35.0	0.0	0.0	279.5	279.5	4.0	283.5
NORTH TIPPERARY	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	195.2	10.0	205.2	205.2	0.4	205.6
SUB TOTAL : MID WEST	69.7	64.0	63.1	204.9	100.1	39.8	124.1	169.9	35.2	195.2	10.0	1076.1	1076.1	9.8	1085.9
OUTSIDE MID WEST															
All Centres / Stores	0.4	1.2	0.1	4.3	5.6	19.3	7.0	0.6	2.1	2.3	126.2	169.0	169.0		
SUB TOTAL															
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	70.1	65.2	63.2	209.2	105.7	59.1	131.1	170.5	37.3	197.5	136.2	1245.1			

Notes:

For each cell, the monetary figure is derived by multiplying the 2016 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the convenience goods market share of the specific centre in that zone (Table 7).

(1) Estimated by Colliers CRE (see Appendix 4C).

TABLE 9 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2016 (€ MILLION)					
Centre	2009 Turnover	2016 Turnover Potential	Turnover Allocation for Existing Retailers 2009-2016	Residual Turnover Potential by 2016	Potential Headroom Expenditure by 2016
	A	B	C ⁽¹⁾	D = B - C	E = D - A
	(Table 6, C)	(Table 8, C)			
WITHIN MID WEST					
Limerick - City Centre	25.4	31.9	2.4	29.5	4.0
Limerick - Rest of City	236.0	289.6	8.1	281.5	45.5
SUB TOTAL: LIMERICK CITY	261.4	321.5	10.5	311.0	49.5
Crescent Shopping Centre (Tesco)	59.7	72.1	3.8	68.4	8.7
Rest of Limerick - Suburbs (excludes City)	65.8	78.6	4.2	74.4	8.5
Rest of County	108.4	124.6	3.5	121.1	12.7
SUB TOTAL: LIMERICK COUNTY	233.9	275.3	11.5	263.8	29.9
Ennis	155.4	186.9	4.0	182.9	27.5
Shannon	20.7	23.7	0.7	22.9	2.2
Rest of County	61.7	72.9	3.2	69.7	8.0
SUB TOTAL: CLARE COUNTY	237.8	283.5	8.0	275.5	37.7
NORTH TIPPERARY	177.5	205.6	7.7	197.9	20.4
SUB TOTAL : MID WEST	910.6	1,085.9	37.7	1,048.2	137.5

Notes:

(1) We assume that all existing convenience goods floorspace at the base year (2009) will achieve a real sales productivity gain of 0.5% per annum. This figure is based on in-depth research carried out by Experian in the UK (see Section 5 in the main report), with an adjustment to reflect the retail economy of the Mid West and the planning aspirations of the Councils. The sales productivity gains are applied to the estimated 2009 benchmark convenience goods turnovers of each centre as set out in Table 6 (Column G).

TABLE 10 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2016							
Centre	Potential Headroom Expenditure by 2016 (€m)	Adjustment for Over / Under Trading in Base Year (€m)	Adjusted Headroom Expenditure by 2016 (€m)	Reduction in Expenditure due to Convenience Goods Floorspace Commitments (as at March 2009) ⁽¹⁾	Adjusted Residual Headroom Expenditure by 2016 (€m)	Assumed Sales Density in 2016 ⁽²⁾ (€ per sq.m net)	Estimated Retail Floorspace Need in 2016 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 9, E)	(Table 6, H)					
WITHIN MID WEST							
Limerick - City Centre	4.0	-42.3	-38.2	19.8	-58.0	10,000	-5,803
Limerick - Rest of City	45.5	7.3	52.8	19.8	33.0	10,000	3,303
SUB TOTAL: LIMERICK CITY	49.5	-34.9	14.6	39.6	-25.0	-	-2,499
Crescent Shopping Centre (Tesco)	8.7	-46.4	-37.8	0.0	-37.8	10,000	-3,778
Rest of Limerick - Suburbs (excludes City)	8.5	-52.6	-44.1	104.9	-149.0	10,000	-14,900
Rest of County	12.7	8.8	21.6	12.7	8.9	10,000	886
SUB TOTAL: LIMERICK COUNTY	29.9	-90.2	-60.3	117.6	-177.9	-	-17,793
Ennis	27.5	43.2	70.7	10.2	60.5	10,000	6,049
Shannon	2.2	-0.3	1.9	34.3	-32.4	10,000	-3,240
Rest of County	8.0	-29.3	-21.2	25.1	-46.3	10,000	-4,633
SUB TOTAL: CLARE COUNTY	37.7	13.6	51.4	69.6	-18.2	-	-1,824
NORTH TIPPERARY	20.4	-39.2	-18.8	57.9	-76.7	10,000	-7,672
TOTAL	137.5	-150.7	-13.2	284.7	-297.9		-29,788

Notes:

- (1) Details and estimated 2016 turnovers of convenience goods floorspace commitments are set out in Appendix 5C.
 (2) The derivation of our 2016 benchmark centre sales density estimates are set out in Section 5 of the main report.

TABLE 11 - CONVENIENCE GOODS EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES, 2022 (€MILLION)																
Retail Supply: Where the Money is Spent		Consumer Demand: Where the Money Comes From (Zone)														
		Study Area											TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-11)	Estimated Inflow Expenditure (Tourists) ⁽¹⁾	Total Convenience Goods Turnover
		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11				
WITHIN MID WEST																
Limerick - City Centre		0.7	11.5	14.1	10.7	0.0	0.3	0.0	0.0	0.0	0.0	37.4	37.4	0.3		37.7
Limerick - Rest of City		82.2	51.5	49.2	75.9	3.4	6.5	65.4	0.0	0.0	0.0	334.2	334.2	2.9		337.1
SUB TOTAL: LIMERICK CITY		82.9	63.0	63.4	86.6	3.4	6.8	65.4	0.0	0.0	0.0	371.6	371.6	3.2		374.8
Crescent Shopping Centre (Tesco)		0.0	0.2	11.1	69.1	1.5	0.0	0.0	0.0	0.3	0.0	82.3	82.3	0.8		83.1
Rest of Limerick - Suburbs (excludes City)		0.8	1.8	0.4	78.6	3.1	4.3	0.0	0.0	0.0	0.0	88.9	88.9	0.8		89.7
Rest of County		0.0	0.0	1.5	0.0	103.5	32.2	0.0	0.0	0.0	0.0	137.3	137.3	1.4		138.7
SUB TOTAL: LIMERICK COUNTY		0.8	2.0	13.1	147.7	108.2	36.5	0.0	0.0	0.3	0.0	308.5	308.5	3.0		311.5
Ennis		0.0	0.0	0.0	0.0	0.0	0.0	16.9	170.4	24.4	0.0	211.7	211.7	2.9		214.6
Shannon		0.0	0.0	0.0	0.0	0.0	0.7	25.2	0.0	0.0	0.0	25.9	25.9	0.4		26.3
Rest of County		0.0	10.5	0.0	0.0	0.0	0.0	30.0	25.9	15.1	0.0	81.6	81.6	1.3		82.9
SUB TOTAL: CLARE COUNTY		0.0	10.5	0.0	0.0	0.0	0.7	72.1	196.4	39.5	0.0	319.2	319.2	4.6		323.8
NORTH TIPPERARY		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	218.1	229.1	229.1	0.5		229.6
SUB TOTAL : MID WEST		83.7	75.5	76.5	234.3	111.5	44.0	137.6	196.4	39.7	218.1	1228.3	1228.3	11.3		1239.6
OUTSIDE MID WEST																
All Centres / Stores		0.5	1.4	0.1	4.9	6.2	21.3	7.7	0.7	2.4	2.6	186.5				
SUB TOTAL		0.5	1.4	0.1	4.9	6.2	21.3	7.7	0.7	2.4	2.6	186.5				
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)		84.2	76.9	76.6	239.2	117.7	65.3	145.3	197.1	42.1	220.7	1414.9				
Notes:																
For each cell, the monetary figure is derived by multiplying the 2022 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the convenience goods market share of the specific centre in that zone (Table 7).																
(1) Estimated by Colliers CRE (see Appendix 5C).																

Notes:
 For each cell, the monetary figure is derived by multiplying the 2022 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the convenience goods market share of the specific centre in that zone (Table 7).
 (1) Estimated by Colliers CRE (see Appendix 5C).

TABLE 12 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2022 (€ MILLION)

Centre	2009 Turnover	2022 Turnover Potential	Turnover Allocation for Existing Retailers 2009-2022	Residual Turnover Potential by 2022	Potential Headroom Expenditure by 2022
	A	B	C ⁽¹⁾	D = B - C	E = D - A
	(Table 6, C)	(Table 11, C)			
WITHIN MID WEST					
Limerick - City Centre	25.4	37.7	4.5	33.2	7.7
Limerick - Rest of City	236.0	337.1	15.3	321.7	85.8
SUB TOTAL: LIMERICK CITY	261.4	374.8	19.9	354.9	93.5
Crescent Shopping Centre (Tesco)	59.7	83.1	7.1	76.0	16.3
Rest of Limerick - Suburbs (excludes City)	65.8	89.7	7.9	81.8	15.9
Rest of County	108.4	138.7	6.7	132.0	23.7
SUB TOTAL: LIMERICK COUNTY	233.9	311.5	21.7	289.8	55.9
Ennis	155.4	214.6	7.5	207.1	51.6
Shannon	20.7	26.3	1.4	24.9	4.2
Rest of County	61.7	82.9	6.1	76.8	15.1
SUB TOTAL: CLARE COUNTY	237.8	323.8	15.0	308.8	70.9
NORTH TIPPERARY	177.5	229.6	14.5	215.1	37.6
TOTAL: MID WEST	910.6	1,239.6	71.1	1,168.5	257.9

Notes:

(1) We assume that all existing convenience goods floorspace at the base year (2009) will achieve a real sales productivity gain of 0.5% per annum. This figure is based on in-depth research carried out by Experian in the UK (see Section 5 in the main report), with an adjustment to reflect the retail economy of the Mid West and the planning aspirations of the Councils. The sales productivity gains are applied to the estimated 2009 benchmark convenience goods turnovers of each centre as set out in Table 6 (Column G).

TABLE 13 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2022							
Centre	Potential Headroom Expenditure by 2022 (€m)	Adjustment for Over / Under Trading in Base Year (€m)	Adjusted Headroom Expenditure by 2022 (€m)	Reduction in Expenditure due to Convenience Goods Floorspace Commitments (as at March 2009) ⁽¹⁾	Adjusted Residual Headroom Expenditure by 2022 (€m)	Assumed Sales Density in 2022 ⁽²⁾ (€ per sq.m net)	Estimated Retail Floorspace Need in 2022 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 12, E)	(Table 6, H)					
WITHIN MID WEST							
Limerick - City Centre	7.7	-42.3	-34.5	20.4	-54.9	10,304	-5,331
Limerick - Rest of City	85.8	7.3	93.1	20.4	72.7	10,304	7,054
SUB TOTAL: LIMERICK CITY	93.5	-34.9	58.6	40.8	17.8	-	1,723
Crescent Shopping Centre (Tesco)	16.3	-46.4	-30.2	0.0	-30.2	10,304	-2,929
Rest of Limerick - Suburbs (excludes City)	15.9	-52.6	-36.7	108.1	-144.8	10,304	-14,051
Rest of County	23.7	8.8	32.5	13.1	19.4	10,304	1,886
SUB TOTAL: LIMERICK COUNTY	55.9	-90.2	-34.3	121.2	-155.5	-	-15,094
Ennis	51.6	43.2	94.8	10.5	84.3	10,304	8,185
Shannon	4.2	-0.3	3.9	35.3	-31.4	10,304	-3,050
Rest of County	15.1	-29.3	-14.1	25.8	-39.9	10,304	-3,876
SUB TOTAL: CLARE COUNTY	70.9	13.6	84.6	71.6	13.0	-	1,260
NORTH TIPPERARY	37.6	-39.2	-1.6	59.6	-61.2	10,304	-5,940
TOTAL: MID WEST	257.9	-150.7	107.2	293.2	-186.0		-18,051

Notes:

- (1) Details and estimated 2022 turnovers of convenience goods floorspace commitments are set out in Appendix 5C.
 (2) The derivation of our 2022 benchmark centre sales density estimates are set out in Section 5 of the main report.

RETAIL STRATEGY FOR THE MID WEST REGION 2010-2016

APPENDIX 7

**Influences On The Update Of
The Retail Strategy**

INFLUENCES ON THE UPDATE OF THE RETAIL STRATEGY

This Appendix describes the main influences that have shaped the preparation of the update to the Mid West Region retail planning strategy which is set out in full in Section 6. The influences may be grouped under the following headings which are considered in turn:-

- the UK retail planning system;
- Irish national policy;
- existing policy and strategies within the Mid West Region.

Influences from the UK Retail Planning System

The UK planning system has undergone a considerable transformation over the past 20 years. The Government has learnt from the past mistake of letting traditional town centres uses be moved to out of centre locations and the clear message from Government is the protection of the vitality and viability of its town centres.

The onus is now clearly on promoting development in towns centres first, followed by edge of centre and out of centre locations only where there are no suitable and viable town centre sites available (the sequential approach). Outside of town centres, developers have to demonstrate there is a need for the development; that it is in the most sequentially preferable location; it is of the right scale, and; the impact on neighbouring centres will not undermine their continued trading health. There have however been recent questions about the unintended impacts of the requirement to demonstrate 'need' restricting competition and consequently a review of the policy is expected to remove the need assessment but enhance the impact assessment.

The new Retail Strategy aims to set out key retail tests which should be adhered to in all large retail applications. These key tests are stringently applied in the UK system and, although it does not totally exclude retail development out of town, it does allow the local authority more control about where development should occur in a way which protects the vitality and viability of existing town centres without unnecessarily curtailing growth.

The planning system and the commercial realities of development have to interact but in some instances they have conflicting interests. Neither can achieve their interests without the other and establishing this balance is one of the most difficult aspects of retail planning for local authorities.

The Mid West Region has successfully facilitated new retail floorspace in its main centres in retail years. However, the scale of the retail development pipeline leaves limited capacity for further retail floorspace other than that already planned as part of recognised city and town centre growth or that already committed.

Irish National Policy Influences

2002 National Spatial Strategy

The National Spatial Strategy (NSS) was launched by the Government in November 2002 to provide a strategic vision for the spatial development of Ireland for the period 2002-2020, focusing on people, places and communities. The NSS aims to achieve a better balance of social, economic and physical development across Ireland, supported by more effective planning.

The strategy recognises that there has been a significant growth in economic, social and physical progress which has not been balanced across the regions. Whilst the Greater Dublin Area is considered to have contributed significantly to Ireland's recent growth and prosperity, other places and areas within Ireland need to be recognised on a national and international scale. The NSS therefore seeks to ensure that for the period 2002-2020 a more balanced pattern of development emerges, identified as 'balanced regional development'.

The definition of 'balanced regional development', as provided in the NSS, is as follows:

"Developing the full potential of each area to contribute to the optimal performance of the State as a whole economically, socially and environmentally."

Unbalanced development ultimately affects the quality of life, for example long journeys to work, services, leisure facilities etc, and affects the vibrancy and attractiveness of towns and villages for residents and visitors. Appropriate land use policies are therefore required in order to guide the appropriate development to a suitable location. In order to provide successful, vibrant and sustainable cities, towns and villages they need to be physically compact with good access to public transport.

National Development Plan

The National Development Plan 2007 – 2013 ‘Transforming Ireland – A Better Quality of Life for All’ is a 20 year planning framework designed to improve the balance of social, economic and physical development and population growth between the regions. It plans for investment to provide not only the physical infrastructure to support progress, but also investment in education, science, technology and innovation. The Plan has four objectives:

- to continue sustainable national economic and employment growth;
- to strengthen and improve Ireland’s international competitiveness;
- to foster balanced regional development;
- to promote social inclusion.

Transport 21 is the capital investment programme of the National Development plan through which the transport system will be developed. It operates two schemes, one for the Greater Dublin Area and one for the rest of Ireland. Transport 21 has four main objectives of its own:

- to create a high quality, efficient national road and rail network consistent with the objectives of the National Spatial Strategy;
- to provide for a significant increase in public transport use in provincial cities;
- to strengthen national, regional and local public transport services;
- to enhance safety and security facilities at the regional airports.

A number of significant infrastructure projects have been recently completed or are currently underway through this programme in the study area, including:-

- 37 km of dual carriageway and 16km of two lane national primary route opened between 2001 and 2006 (including Limerick Southern Ring Road Phase 1 opened May 2004);
- Ennis by-pass completed Jan 2007;
- N24 Cahir by-pass opened October 2007;
- N8 Cashel to Mitchelstown opened July 2008;
- N7 Neenagh to Limerick upgrade due for completion mid 2009;

INFLUENCES ON THE UPDATE OF THE RETAIL STRATEGY

- Phase 2 of Limerick South Ring Road (including the Limerick Tunnel) linking the Dublin Road N7 to the Ennis Road N18 due for completion end 2010;
- N18 Crusheen to Gort bypass started 2009;
- Preliminary studies on improvements to the N20, N21 and N24 routes;
- Improvements to non-national roads including the R353 Ennis to Portumna and R462 Tulla to Kikishen routes;
- Rural transport Programme providing funding for flexible door to door services providing regular access to shopping, health services, education, day care and social activities;
- Accessible Public Transport improvements making public transport accessible for all users;
- Phase 1 of the Western Rail Corridor renewal (from Ennis to Athenry) bringing 36 miles of track back into service with trains due to start running in August 2009.
- Phases 2 and 3 of the Western Rail corridor to be completed by 2011 and 2014 respectively (subject to funding allocations available in the current economic climate) which will eventually link Ennis to Claremorris via Athenry and Tuam and other new intermediate stations.

Retail Planning Guidelines for Local Authorities (2005)

The Retail Planning Guidelines, originally published in 2000 but were updated in February 2005 to include an additional guidance on large retail warehouse development (para 26). The Guidelines provide a comprehensive framework to guide local authorities in the preparation of Development Plans and the assessment of applications for planning permission. Planning authorities are statutorily required to have regard to the Guidelines in the performance of their functions.

The Guidelines identify a four tier national retail hierarchy reflecting the scale of development across the country. The classification is indicative and as the specific retail functions provided by each tier overlap, there are no clearly defined cut off points between the tiers. The retail hierarchy is set out in Table 2.6 in the main report.

INFLUENCES ON THE UPDATE OF THE RETAIL STRATEGY

The Guidelines identify five policy objectives:

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

When applying these objectives, the Guidelines indicate that it is not the purpose of the planning system to inhibit competition, preserve existing commercial interests or prevent innovations. The guidelines should therefore be interpreted in a way which avoids local authorities taking actions which would adversely affect competition in the retail market.

The Guidelines introduced the ‘sequential test in to Ireland. The preferred location for new retail development should be on sites available within town centres, the next preference should be a location on the edge of centres. Only where there are no sites or potential sites within a town centre or on its edge, or satisfactory transport accessibility (including Park and Ride) cannot be realistically ensured within a reasonable period, should out of centre development be contemplated. As a limited exception to the presumption against out of centre development, large retail warehouses may be considered for locations close to national roads/motorway networks where the proposed development would be situated in an Integrated Area Plan in a Gateway (designated by National Spatial Strategy) and where the road network has sufficient capacity for the scale of development proposed.

Development Plans

The Guidelines set out those matters which are to be included in all future Development Plans for Counties and Cities;

INFLUENCES ON THE UPDATE OF THE RETAIL STRATEGY

- i) Confirmation of the retail hierarchy, the role of centres and the size of the main town centres;
- ii) Definition of Development Plan of the boundaries of the Core Shopping Areas of town centres;
- iii) A broad assessment will be a requirement for additional retail floorspace;
- iv) Strategic Guidance on the location and scale of retail development;
- v) Preparation of policies and action initiatives to encourage the improvement of town centres;
- vi) Identification of criteria for the assessment of retail developments.

The Guidelines specifically identify those counties and cities which should jointly prepare comprehensive retail strategies. These include:

AREA	RELEVANT COUNTY OR CITY
Limerick	County Limerick
	County Clare
	Limerick City Council

The background studies to underpin the retail planning strategy should define the boundaries of the areas to be covered and should assess the broad requirement for additional development over the plan period.

Floorspace Caps

Floorspace limits on the size of individual new stores are set in the Guidelines. For convenience stores (outside the Greater Dublin Area) the floorspace cap is set at 3,000 sq m. Similarly the floorspace cap for retail warehouses is 6,000 sq m sales floorspace except in areas subject of Integrated Area Plans (including Limerick City Council) and certain specified towns (including Shannon). Any proposals for individual retail warehouses with a floorspace in excess of 6,000 sq m gross in an area subject to an Integrated Area Plan would need to demonstrate that the proposal will:

- i) Be located close to a road network with sufficient capacity to cater for development of the scale proposed;

INFLUENCES ON THE UPDATE OF THE RETAIL STRATEGY

- ii) Be served by existing or planned public transport services;
- iii) Make adequate provision for those opting for home delivery of goods;
- iv) Be accompanied by a Traffic Impact Assessment;
- v) Take account of the vitality and viability criteria in respect of city and town centres as set out in the Guidelines.

Regional Planning Policy

The Mid-West Regional Strategy and Regional Planning Guidelines were issued in May 2004. They set out provision for the Mid-West comprising Clare County, Limerick City and County and North Tipperary. It has identified eight key mechanisms which need to be activated to achieve a 'regional of excellence for working, learning, leisure and living'. These are:

- Vision
- Connectivity
- World class places and products
- Enterprise enablers
- Balance
- Sustainability
- Quality of life
- Creation of new growth areas

The strategy identifies three potential development options, recommending Option 3 as it draws together the benefits of the other two.

Option 3:-

'Development of a strong core in Limerick/Ennis/Shannon complimented by other key regional towns with encouragement of development in other centres and in rural areas of the region'.

The Strategy identified nine sub-zones to be developed in ways that reflect their particular characteristics. These are as follows:-

INFLUENCES ON THE UPDATE OF THE RETAIL STRATEGY

Zone 1 – Limerick/Ennis/Shannon

Zone 2 – Outer Core Area

Zone 3 – West Clare

Zone 4 – North Clare

Zone 5 – West Limerick

Zone 6 – East Tipperary

Zone 7 – North West Tipperary

Zone 8 – North East Clare

Zone 9 – South Limerick

Additionally, the region also contains a number of special areas that cross county boundaries and require co-ordinated development. There are eight special areas identified:-

- Limerick/Ennis/Shannon
- Shannon Estuary
- Loughderg
- Burren
- Atlantic Coast
- Galtees and Ballyhoura
- Slieve Aughty
- Slieve Felim

Reference is made to the existing Regional Retail Strategy which identifies the main strategic retail centres, recommending where major retailing development should take place. The principle centres are the Limerick/Ennis/Shannon area; however this should not inhibit the capacity of smaller centres to provide facilities appropriate to their size and scale. The retail strategy guides the location of new retail development; however one of the issues that remain to be addressed is the extent and size of development that should occur in various parts of the Limerick/Ennis/Shannon area.

The Regional Planning Guidelines are made with the requirements of the Planning Development Act 2000 (The Act). They are also based upon the analysis of the development strategy. Their aim is to provide a broad context within which the physical planning of the region can be co-

ordinated and to provide a planning framework for the County, City and Town authorities which implement the Act at a local level. They also aim to facilitate the provision of the physical and infrastructure requirements to secure the social and economic laws identified in the vision.

The Regional Planning Guidelines refer to the Retail Planning Guidelines which should be used to manage the provision of major retail developments. The regional guidelines state that even where the precise levels of provision have not been identified for particular areas within the Limerick/Ennis/Shannon area retail planning decisions which still reflect a regional policy framework. In general retail provision should be made in accordance with the developing needs of the area.

Regional Retail Strategy

The Retail Strategy for the Mid West Region 2002 – 2011 was prepared by DTZ Piedad Consulting in February 2003. The purpose of the strategy is to set out an integrated strategic framework for retail planning across the region over the period up to 2011, which would be translated at County/City level into retail strategies and Development Plan variations specific to the different authority areas. The overall objective of the strategy is to provide strategic guidance on the location and scale of new retail development and to achieve a distribution which is efficient, equitable and sustainable.

The strategy defines a hierarchy for the mid west based upon the Retail Planning Guidelines national hierarchy and a detailed review of existing settlement characteristics. This hierarchy is shown below:-

INFLUENCES ON THE UPDATE OF THE RETAIL STRATEGY

The Mid West Retail Hierarchy

Mid West Retail Hierarchy		
	METROPOLITAN AREA	HINTERLAND AREA
Tier 1	Metropolitan Centre	
	Limerick City Centre	
Tier 2	Main Retail Centres Dooradoyle	Major Town Centres Level 1 Clare : Ennis Level 2 Clare : Shannon Limerick County : Newcastlewest North Tipperary : Nenagh and Thurles
Tier 3	District Centres Level 1 Caherdavin, Castleroy and Parkway Level 2 Roxboro Shopping Centre	Town Centres Level 1 Clare : Kilrush Limerick County : Abbeyfeale North Tipperary : Roserea Level 2 Clare : Ennistymon, Killaloe/Ballina and Scarriff Limerick County : Adare, Kilmallock and Rathkeale North Tipperary : Ballina/Killaloe and Templemore
Tier 4	Neighbourhood Centres	Small Towns and Village Centres* Level 1 : Small Towns Level 2 : Village Centres
Tier 5	Local / Corner Shops	Local / Corner Shops : Smaller villages/crossroads – rural shops (post offices, creameries, public houses, petrol filling stations etc)
<p>Notes: The two levels within Tiers 2, 3 and 4 of the hierarchy reflects the different functions and potential of centres within each tier. Those in Tiers 1, 2 and 3 are identified as the main centres within the Regional Retail Hierarchy. The designation of centres within Tiers 4 and 5 is a matter for individual local planning authorities in the Region to determine in their retail strategies and development plan variations.</p> <p>* Small Towns and Village Centres are all those below the 1,500 population threshold set for Tier 4 centres in the RPG hierarchy.</p> <p>Source: Retail Strategy for the Mid West Region, 2002 – 2011 (February 2003)</p>		

INFLUENCES ON THE UPDATE OF THE RETAIL STRATEGY

The strategy adopts the approach of the national retail planning guidelines in that it advocates a town centres first strategy through the adoption of the “sequential approach”. It assumes however that the net share of expenditure available to town centres will remain constant based on current shopping patterns over the timescale of the Strategy. The Limerick Metropolitan Area is considered as an integrated retail planning unit requiring a joint approach by the City Council and Limerick and Clare County Councils. The Strategy acknowledges that Limerick, with Shannon, is identified as a “gateway” in the National Spatial Strategy, and accordingly concludes it is important that the needs of the Metropolitan Area are looked at to 2011 and beyond in terms of retail planning. New retail floorspace should predominantly sell comparison goods if the offer is to remain competitive to both visitors and residents. In the period to 2006 and early post 2007, the strategy concludes that the majority of new retail floorspace will need to be located in the city’s environs if the Metropolitan Area’s role of importance is to be sustained. Furthermore, this is where most of the new convenience floorspace should be located.

The Strategy concludes that the potential for the remainder of Limerick County Area is also significant, given the limited offer that currently exists. It identifies a need to strengthen both the quality and quantum of convenience floorspace in the main centres. First priority for both comparison and convenience shopping should be in Newcastle West, however, this should not prejudice the delivery of convenience, comparison and mixed developments in the other centres.

West respect to Clare County, the distribution of the new large scale retail floorspace should be focussed on Ennis and Shannon, their importance recognising their designation as a ‘hub’ and ‘linked gateway’ respectively in the National spatial Strategy. Again however the priority afforded to these two centres should not prevent further retail development in Killrush or lower order centres that is appropriate to their role and function. Clare is however predominantly a rural County and accordingly it is important for the Strategy to encourage the enhancement of retail provision across the County in accordance with the County Development Board’s Integrated Strategy for Social, Economic and Cultural Development.

Statutory Development Plans

Retail development is primarily regulated through the Development Control process and the acceptance of retail development at a particular location depends on the policy and zoning provision within the different County and City plans.

INFLUENCES ON THE UPDATE OF THE RETAIL STRATEGY

Under Part II Chapter 1 of the Local Government (Planning and Development) Act 2000, planning authorities have a statutory duty to produce a Development Plan for their functional area every six years.

The purpose of a Development Plan is to provide a strategic framework for sustainable development to ensure growth takes place in a co-ordinated and integrated manner, whilst protecting, preserving and enhancing the intrinsic character, heritage and amenity of an area and making a positive contribution to an improvement in the quality of life.

A Development Plan must include the zoning of land for the use of particular areas for specific uses within the respective settlement boundary. New retail development is mainly regulated through the development control process and the determination of whether a proposed retail development is acceptable is highly dependant upon the relevant policies and the zoning of the respective development plan. Therefore the zoning strategy within the Development Plans is a key factor to retail planning strategy.

A summary of Development Plan zoning and settlement hierarchies is set out in **Appendix 8C**.

RETAIL STRATEGY FOR THE

MID WEST REGION

2010-2016

APPENDIX 8

List of Public Submissions Received

Retail Strategy Submissions

1. Submission from **Cllr. Kevin Kiely, Limerick City** – Re: Coonagh Cross Shopping Centre
2. Submission from Simon Clear & Associates, Planning & Development Consultants **on behalf of STC Developments Ltd**, Unit 46, Shannon Town Centre, Shannon, Co. Clare – Re: Regarding the designation of core retail areas in urban settlements across the region
3. Submission from Declan Brassil and Company Limited **on behalf of Crystal Partners Limited**. The key points they wish to focus on are –
 - Need for the Review
 - Focus on Clare
 - Addressing the Market
4. Submission from Cunnane Stratton Reynolds, Land Planning & Design **on behalf of Mr. Paul O'Brien and Mr. Robert Butler, Dough Hotels Limited**, c/o Mount Kennett House, Henry Street, Limerick – Re: With regard to his site, the South Court Hotel, Gouldavoher, Raheen, Co. Limerick
5. Submission from **Tiernan Properties**, Arthurs Quay House, Arthurs Quay, Limerick – Re: Extent of Out of Centre Retail Development in Limerick
6. Submission from Brendan McGrath & Associates, Planning Consultants **on behalf of Finn Properties Ltd.**, Galvone Business Park, Limerick – Re: The Retail Hierarchy
7. Submission from HRA/Planning, Limerick **on behalf of Ballynew Developments Limited** – Re: Lands at Old Texaco Site, Clondrinagh
8. Submission from HRA/Planning, Limerick **on behalf of Cressington Developments Limited** – Re: In relation to lands on the Limerick Clare Border
9. Submission from **Minister Willie O'Dea, T.D.**, - Re- Coonagh Cross Shopping Centre
10. Submission from **Michael Noonan, T.D.**, - Re – Coonagh Cross Shopping Centre
11. Submission from HRA/Planning, Limerick **on behalf of the Limerick Southside Regeneration Agency**, Limerick – Re: Lands located around Roxboro Roundabout
12. Submission from the Development Planning Partnership, 15 Harcourt Street, Dublin 2 **on behalf of Chieftain Construction Ltd/Tesco Ireland** - Re: Tesco Presence in the Mid West Region/Coonagh Cross, Ennis Road, Limerick

13. Submission from Cunnane Stratton Reynolds, Land Planning & Design,
on behalf of Greenband Investments and Sean Halpin – Re: In respect of
lands at Smithstown, Shannon, Co. Clare



SuperValu

Fitzpatrick's



Comhairle Contae an Chláir
Clare County Council

Clare County Council,
Áras Contae an Chláir,
New Road,
Ennis, Co. Clare

Tel: +353 (65) 682 1616
planoff@clarecoco.ie
www.clarecoco.ie

8

Clare County Development Plan 2017-2023
Retail Strategy for the Mid West Region
2010-2016