

**COLLIERS CRE**



# **RETAIL STRATEGY FOR THE MID WEST REGION**

**2010-2016**

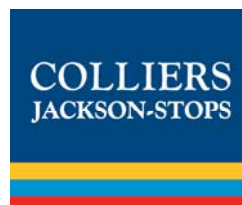
As amended by the Elected Members of Limerick County Council on 1st November 2010

**Volume 1**

**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)*



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## 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 floor space 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 a 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 sqm 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-sopped, 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 sqm net of additional non-bulky comparison goods floorspace is forecast by 2016 (rising to 39,000 sqm net at 2022). This equates to around 24,600 sqm gross and 60,000 sqm 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 neighbourhood 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.
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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 sqm 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 of ten 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 sqm 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 sqm 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

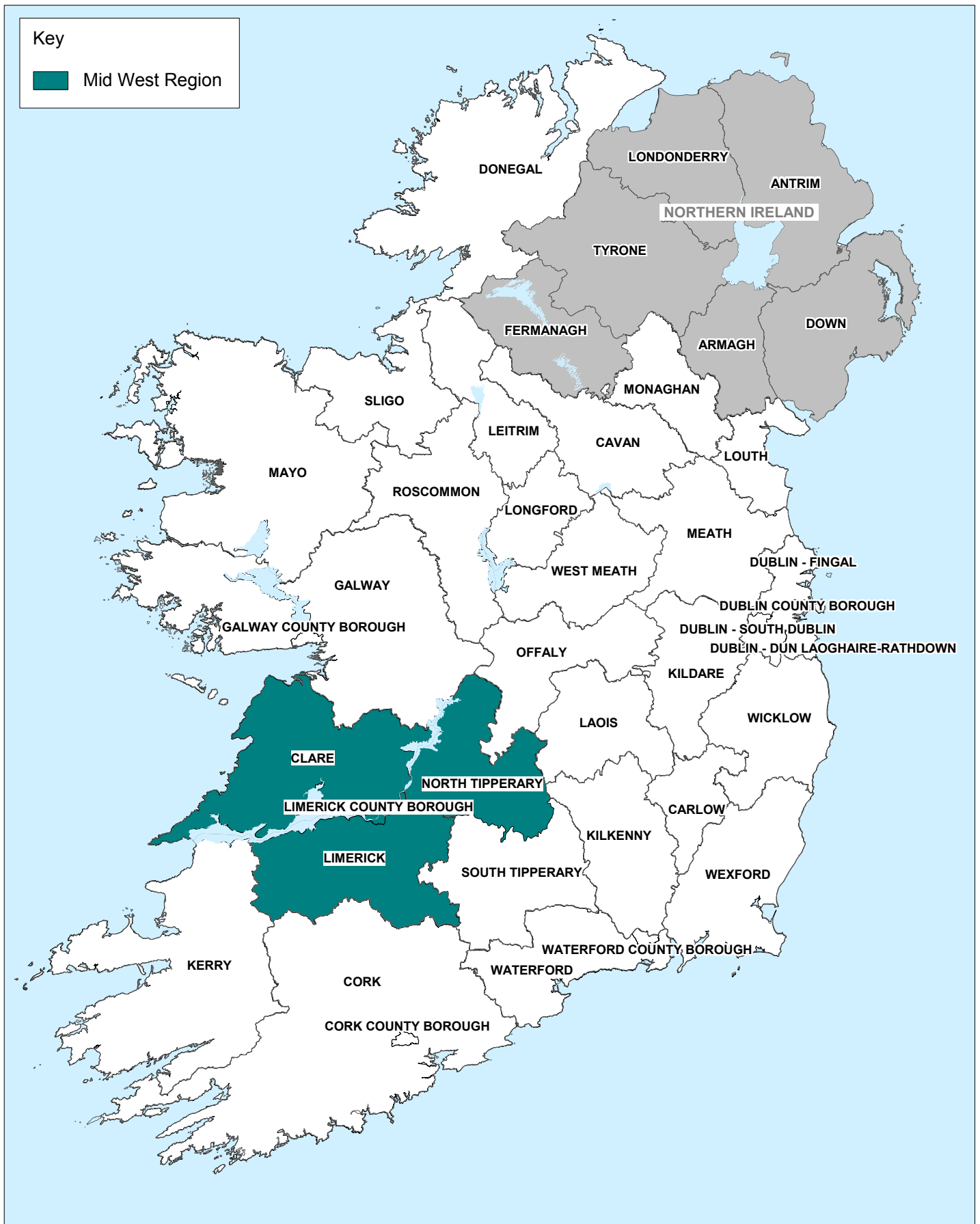
- 1.1 The existing Retail Strategy for the Mid West Region was adopted in 2003 and covered the time frame of 2003-2011. Since 2003 the Mid West has seen significant economic and population growth, whilst the Department of the Environment, Heritage and Local Government (DoEHLG) has published a revised 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
<b>Total</b>	<b>360,028</b>	<b>100</b>

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 existing centres and shops throughout the Mid West;<sup>1</sup>
  - details of retail floorspace commitments (floorspace under construction or with planning consent but not yet started);<sup>1</sup>
  - consumer retail expenditure per head for residents of the Mid West and the forecast growth in this expenditure;<sup>2</sup>
  - population estimates and projections for the Mid West Region and defined geographical sub-areas.<sup>3</sup>

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

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

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

<sup>3</sup> 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)<sup>1</sup>. 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.

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<sup>1</sup> 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.<sup>1</sup> 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
<b>2001</b>	347,516	-	-
<b>2006</b>	376,255	360,028	(16,227)
<b>2011</b>	407,371	387,652	(19,719)
<b>2016</b>	-	421,779	-
<b>2022</b>	-	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.

<sup>1</sup> 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.<sup>1</sup> 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>

<sup>1</sup> 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).<sup>1</sup> 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,<sup>2</sup> 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 stock<sup>3</sup> 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 West<sup>3</sup> 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

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

<sup>2</sup> 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.

<sup>3</sup> 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)	
<b>2001-2005</b>	4.1% pa (F)	<b>2001-2011</b>	2.3% pa (F)
<b>2005-2010</b>	3.7% pa (F)		
<b>2010-2015</b>	1.9% pa (F)		
Actual Growth (2001-07) and Forecasts Adopted in New Retail Strategy			
All Retail Goods Expenditure		Convenience Goods Expenditure (Only)	
<b>2001-2005</b>	2.5% pa (A)	<b>2001-2005</b>	0.0% pa (A)
<b>2005-2007</b>	5.7% pa (A)	<b>2005-2007</b>	2.4% pa (A)
<b>2007-2016</b>	1.9% pa (F)	<b>2007-2016</b>	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.<sup>1</sup>

### **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,<sup>2</sup> 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 underestimated 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.<sup>3</sup> 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).

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

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

<sup>3</sup> 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)
<b>Mid West</b>	<b>72,586</b>	<b>177,825</b>	<b>250,411</b>	<b>15,872</b>

**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
<b>Mid West Region</b>	<b>266,282</b>	<b>532,014</b>

\*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 floor space 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.<sup>1</sup> 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.

<sup>1</sup> 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, <b>Limerick</b> , Galway, Waterford
Tier 3	Athlone, Carlow, Castlebar, Clonmel, Drogheda, Dundalk, <b>Ennis</b> , Kilkenny, Letterkenny, Monaghan, Mullingar, Newbridge, Portlaoise, Tralee, Tullamore, Wexford
Tier 3 (convenience lead)	Arklow, Athy, Ballina, Cavan, Dungarvan, Enniscorthy, Killarney, Longford, Mallow, Middleton, Naas, Navan, Nenagh, New Ross, Sligo, Swords, Thurles
Tier 4	(75 Centres with population between 1,500 – 5,000 including) <b>Kilrush, Sixmilebridge, Newmarket on Fergus, Annacotty.</b>
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
<b>Tier 1</b>	<b>Metropolitan Centre</b>	
	Limerick City Centre	
<b>Tier 2</b>	<b>Main Retail Centres</b>  Dooradoyle	<b>Major Town Centres</b>  <b>Level 1</b> <b>Clare</b> : Ennis  <b>Level 2</b> <b>Clare</b> : Shannon <b>Limerick County</b> : Newcastlewest <b>North Tipperary</b> : Nenagh and Thurles
<b>Tier 3</b>	<b>District Centres</b>  <b>Level 1</b> Caherdavin, Castleroy and Parkway  <b>Level 2</b> Roxboro Shopping Centre	<b>Town Centres</b>  <b>Level 1</b> <b>Clare</b> : Kilrush <b>Limerick County</b> : Abbeyfeale <b>North Tipperary</b> : Roserea  <b>Level 2</b> <b>Clare</b> : Ennistymon, Killaloe/Ballina and Scarriff <b>Limerick County</b> : Adare, Kilmallock and Rathkeale <b>North Tipperary</b> : Ballina/Killaloe and Templemore
<b>Tier 4</b>	<b>Neighbourhood Centres</b>	<b>Small Towns and Village Centres*</b>  <b>Level 1</b> : Small Towns <b>Level 2</b> : Village Centres
<b>Tier 5</b>	<b>Local / Corner Shops</b>	<b>Local / Corner Shops</b> : Smaller villages/crossroads – rural shops (post offices, creameries, public houses, petrol filling stations etc)
<p><b>Notes:</b> 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
<b>Total</b>	<b>25,500</b>	<b>31,900</b>	<b>99,800</b>	<b>116,200</b>

- 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 floor space 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 appropriately 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 floor space 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 output 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,<sup>1</sup> 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.

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<sup>1</sup> 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 billion to €188.0 billion, a rise of almost 25%<sup>1</sup> at constant market prices in just four years. Reflecting this national economic expansion total

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<sup>1</sup> 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.<sup>1</sup>

- 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.<sup>2</sup>
- 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,<sup>2</sup> 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

<sup>1</sup> CSO County Incomes and Regional GDP, 2006, 24 February 2009.

<sup>2</sup> *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 indirect 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 sqm 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
<b>2002</b>	72,586	146,270	31,555	250,411	15,872	266,283
<b>Additions 2002-09</b>	60,640	32,741	102,487	195,868	—	—
<b>Existing Mar 2009</b>	133,226	179,011	134,042	446,279	85,735	532,014

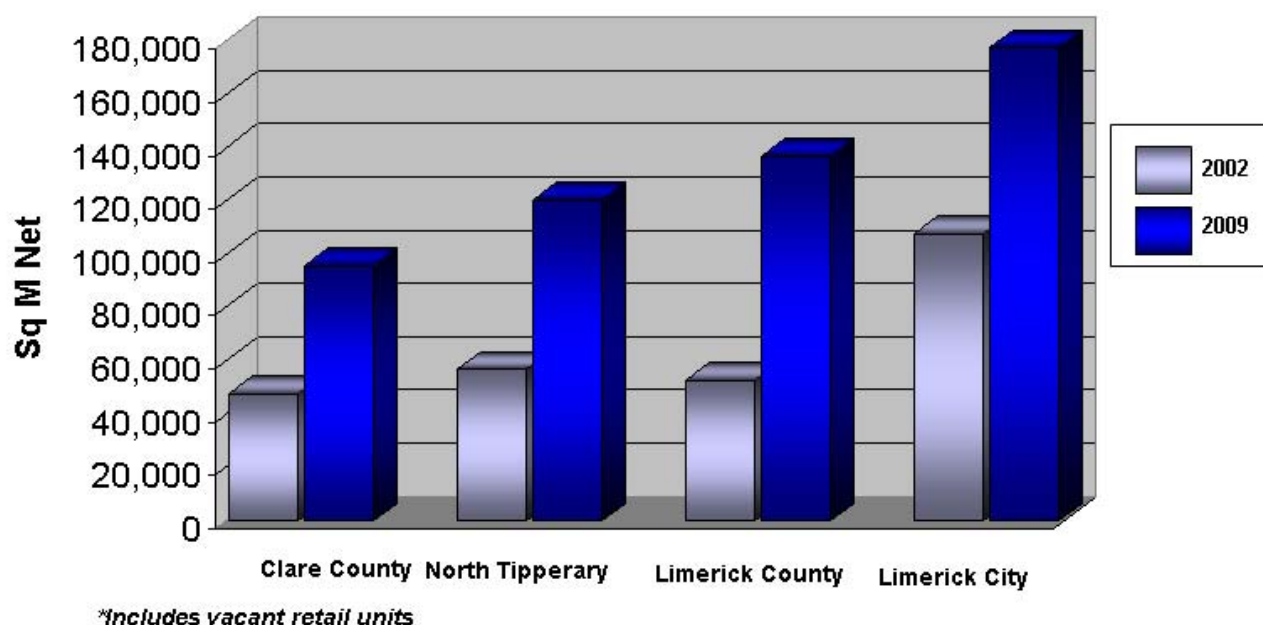
**Source:** DTZ Sherry FitzGerald Floorspace Survey, December 2009 and Councils/Colliers CRE floorspace figures and estimates, 2009.

- 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 2002<sup>1</sup> 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.

<sup>1</sup> 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
<b>Limerick City</b> (City Centre only)	40 (36)	33 (17)
<b>Limerick County</b>	20	26
<b>Clare County</b>	18	18
<b>North Tipperary</b>	22	23
<b>Mid West</b>	<b>100</b>	<b>100</b>

*\*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
<b>Mid West Total</b>	<b>15,872</b>	<b>100</b>	<b>85,735</b>	<b>100</b>

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

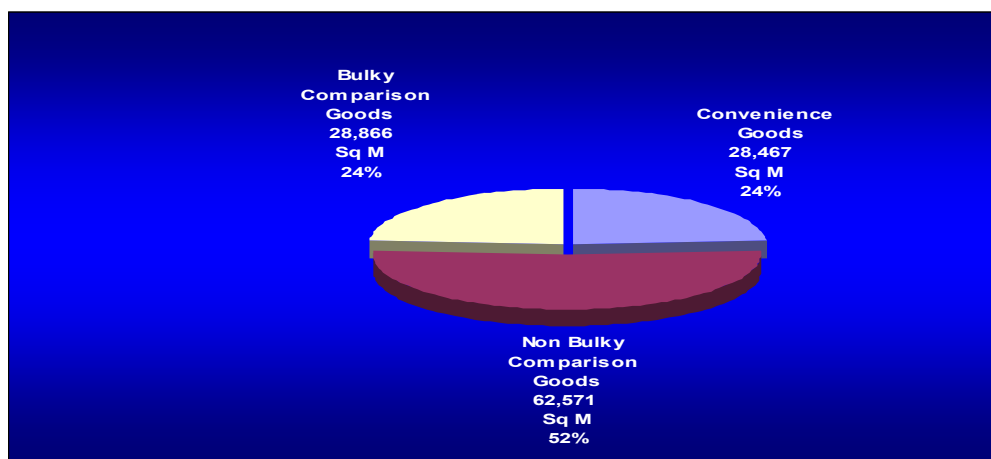
### **The Retail Development Pipeline**

3.51 The full retail development pipeline <sup>1</sup> 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:-

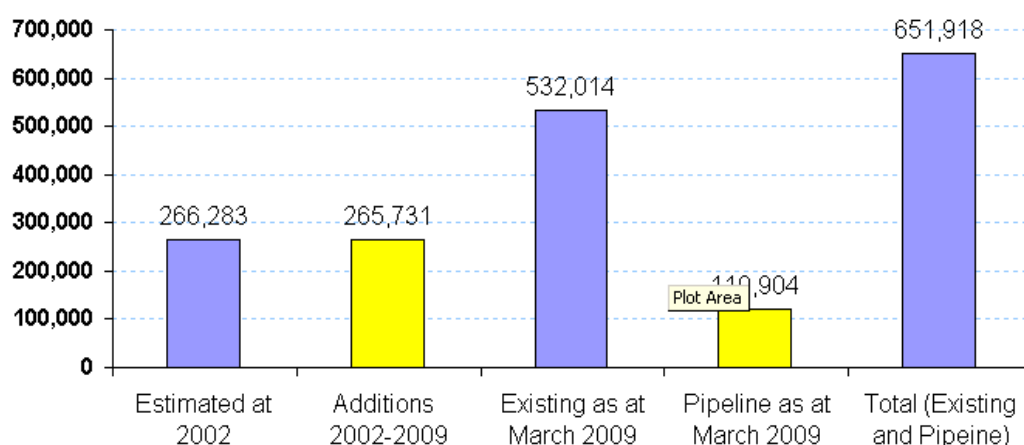
- retail floorspace need **before** deductions of retail commitments;
- retail floorspace need **after** deductions of retail commitments.

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

<sup>1</sup> 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 <sup>(1)</sup>	340,875	0.8	4,719
2009	532,014	374,000	1.4	5,546
2016 <sup>(F)</sup>	651,918 <sup>(2)</sup>	421,779	1.5	6,833
2002-16	+145%	+24%	+88%	+45%

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

(<sup>F</sup>): Forecast).

**Notes:** <sup>(1)</sup> The 2003 Retail Strategy may have under-estimated actual retail floorspace stock.

<sup>(2)</sup> 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.

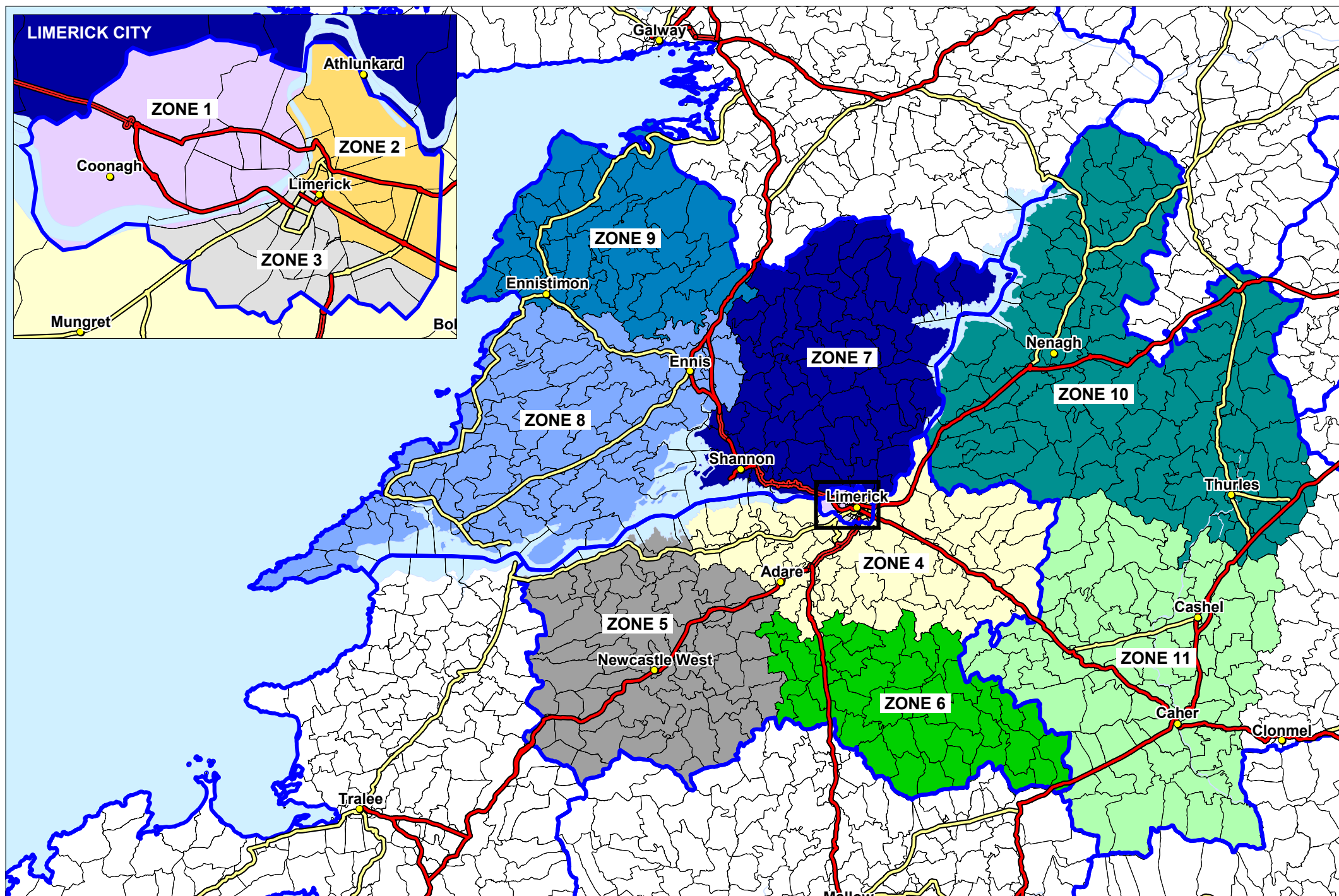
### Assessment of the Mid West Retail Economy

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***

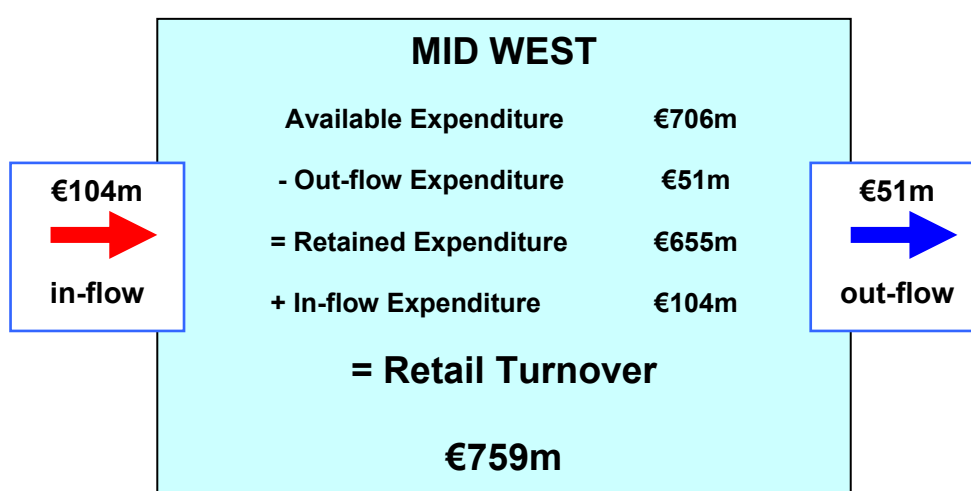
- 4.6 Using the results of the household survey, the retail trading performance of the Mid West retail economy as a whole for each of the main categories of goods at the base year of 2009 was assessed. In particular, the volume of consumer retail expenditure in-flows and out-flows to and from the Mid 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 2009<sup>1</sup> was estimated. In addition, by expressing turnover as a proportion of available expenditure, the levels of expenditure 'retention' have been estimated for the region.

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<sup>1</sup> 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,<sup>1</sup> 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**

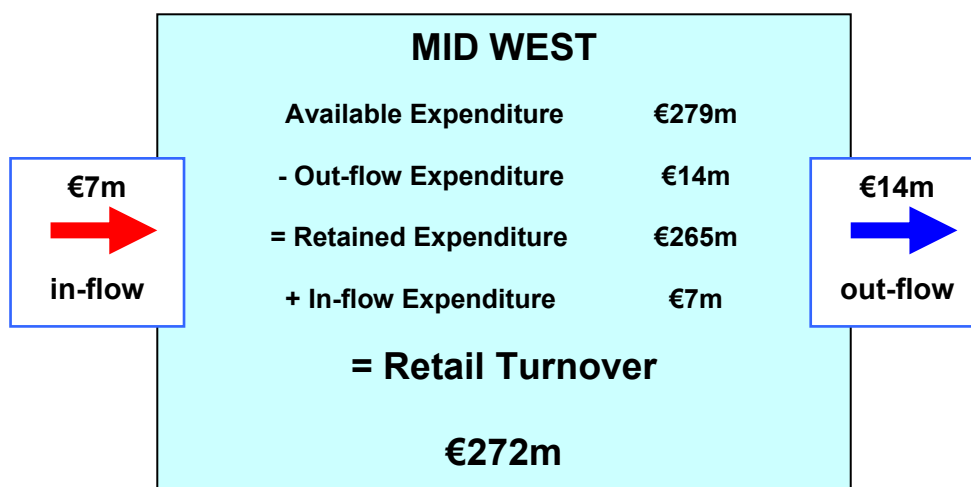


- 4.9 For **bulky comparison goods** the household survey indicates that €14 million of the available spend of €279 million currently leaks out of the Mid West to competing centres. (see **Figure 4.3** overleaf). Thus €2 65 million of locally generated bulky comparison goods expenditure is retained within the region, equating to a retention rate of 95%. Adding to this an in-flow spend of €7 million<sup>2</sup> produces an estimated annual bulky comparison goods turnover for the Mid West of €272 million.

<sup>1</sup> 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.

<sup>2</sup> 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.

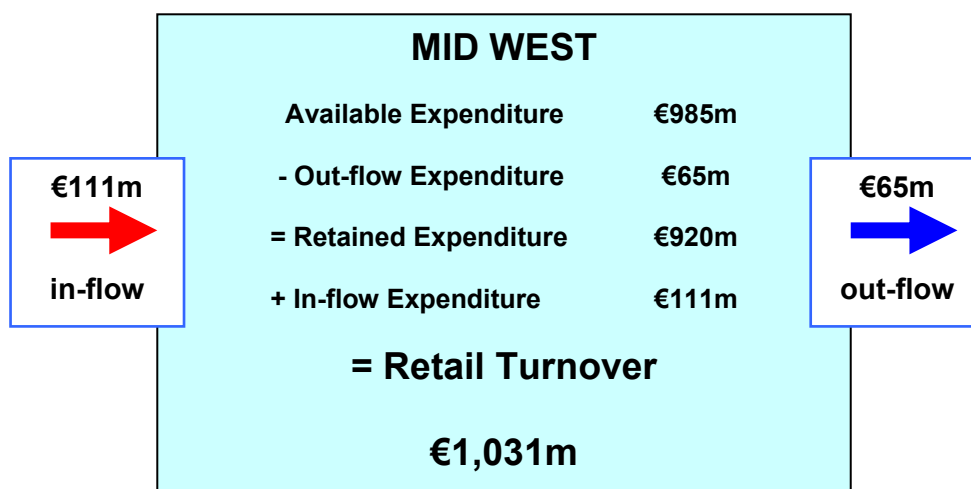
Fig 4.3: Mid West: Retail Characteristics: Bulky Comparison Goods, 2009



- 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.<sup>1</sup> 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.

<sup>1</sup> 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

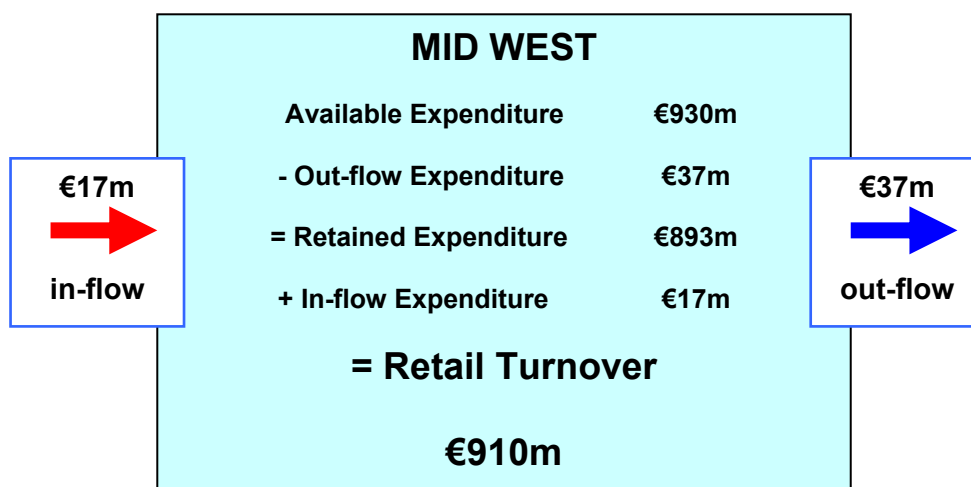


- 4.13 In relation to **convenience goods** (see **Figure 4.5** overleaf), it is estimated that the Mid West currently attracts an estimated in-flow of €17 million,<sup>1</sup> whilst €37 million leaks out to competitor centres/stores in other areas – mainly from zone 6 to zone 11 and to Charleville 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.<sup>2</sup> Accordingly, there is almost no potential to clawback consumer spend on convenience goods.

<sup>1</sup> 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.

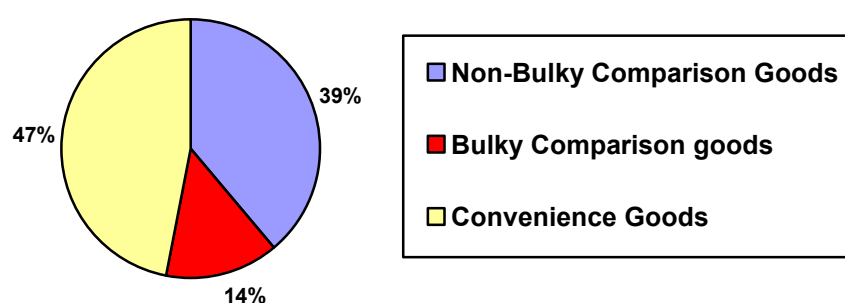
<sup>2</sup> Retail Strategy for the Greater Dublin Area, 2008-2016, Regional Planning Guidelines Office and Dublin and Mid East Regional Authorities, July 2008.

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

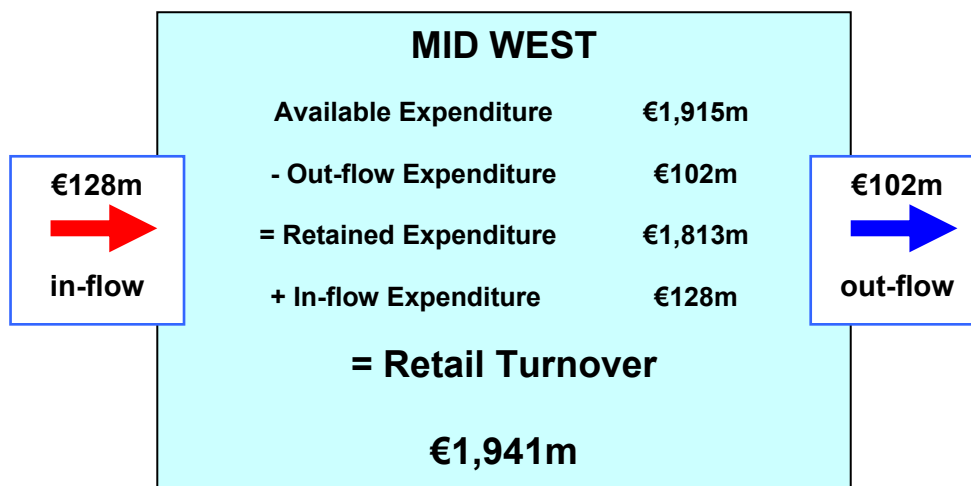


4.15 **Combining** the convenience goods with the non-bulky and bulky comparison goods categories indicates that the Mid West has an estimated **total** retail turnover of €1,941 million, of which 53% relates to comparison goods shopping (39% non-bulky goods and 14% bulky goods), and 47% to convenience 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 enable s retail exp enditure 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%
Clare 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 5 2%, 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

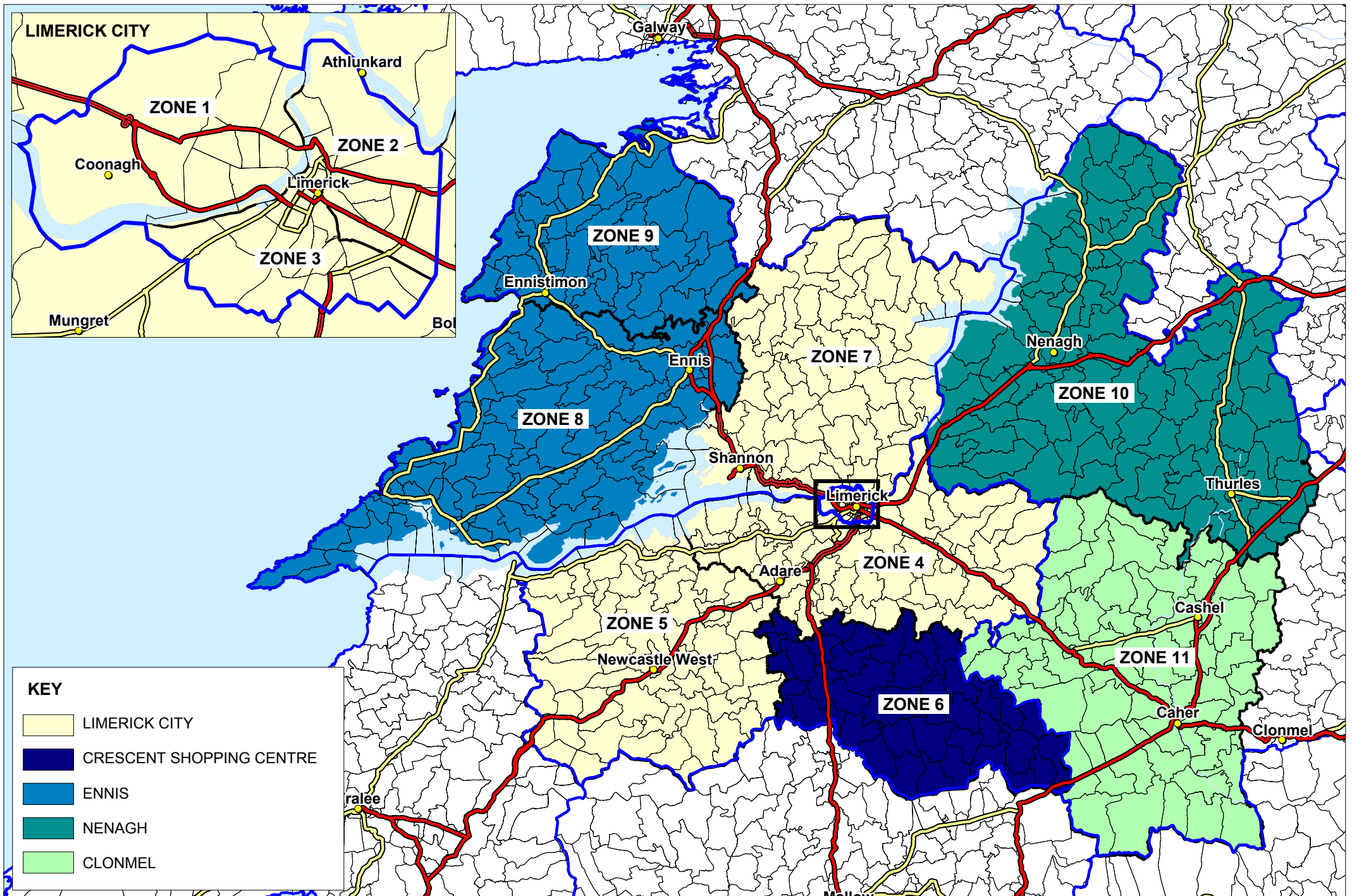




Fig. 4.9 Centre Dominance Map: Bulky Comparison Goods

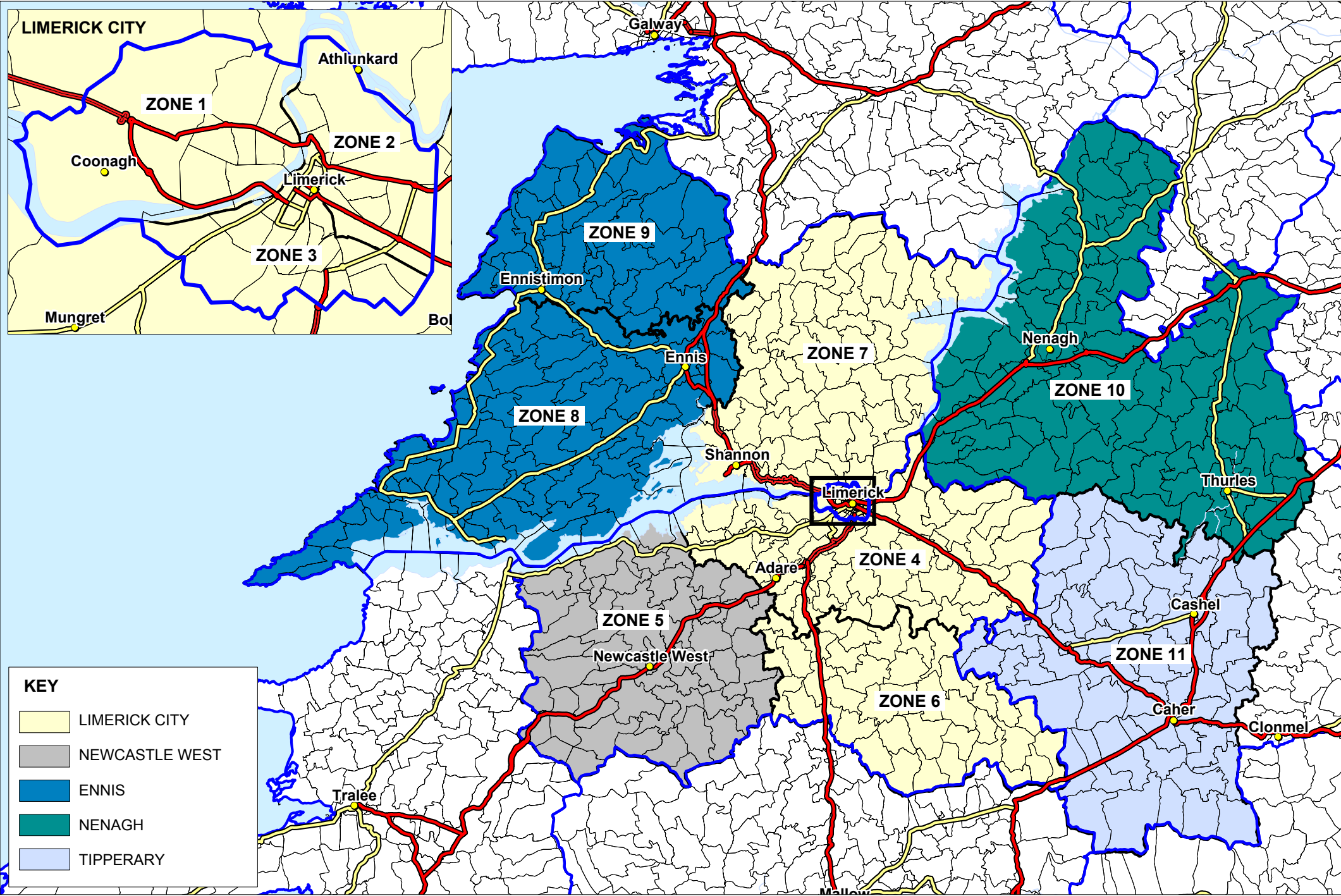
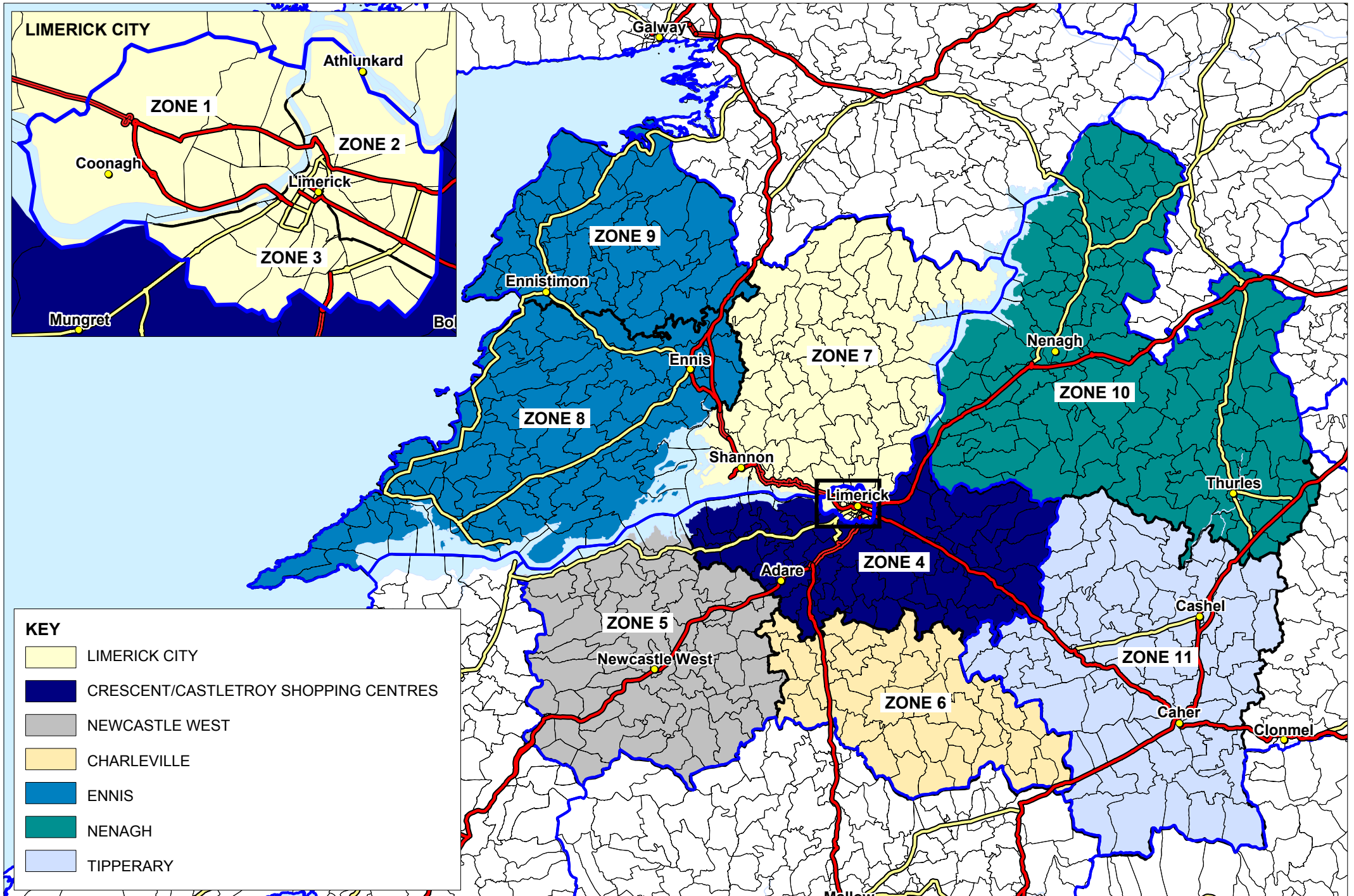


Fig. 4.10 Centre Dominance Map: Convenience Goods





- 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

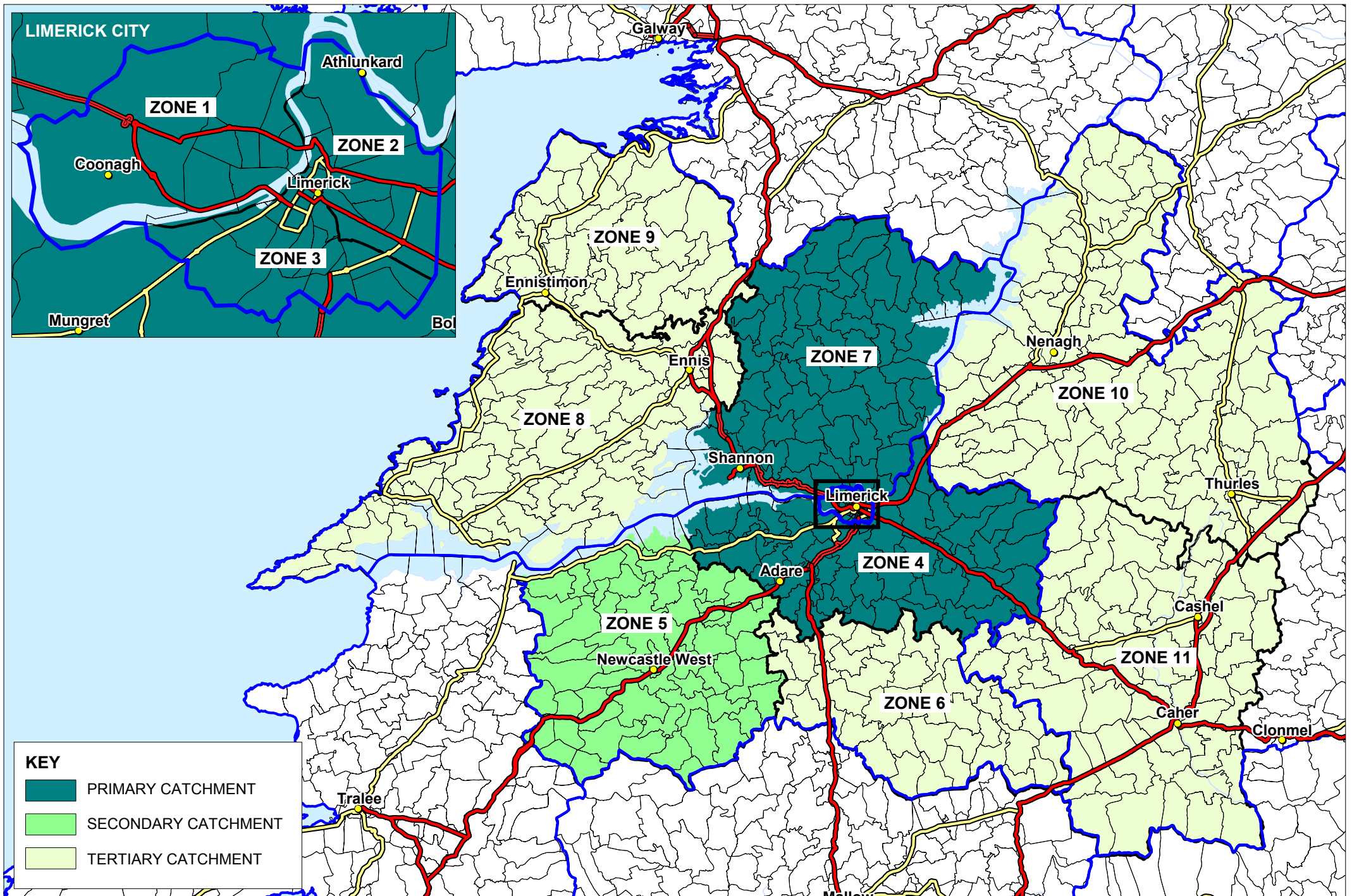
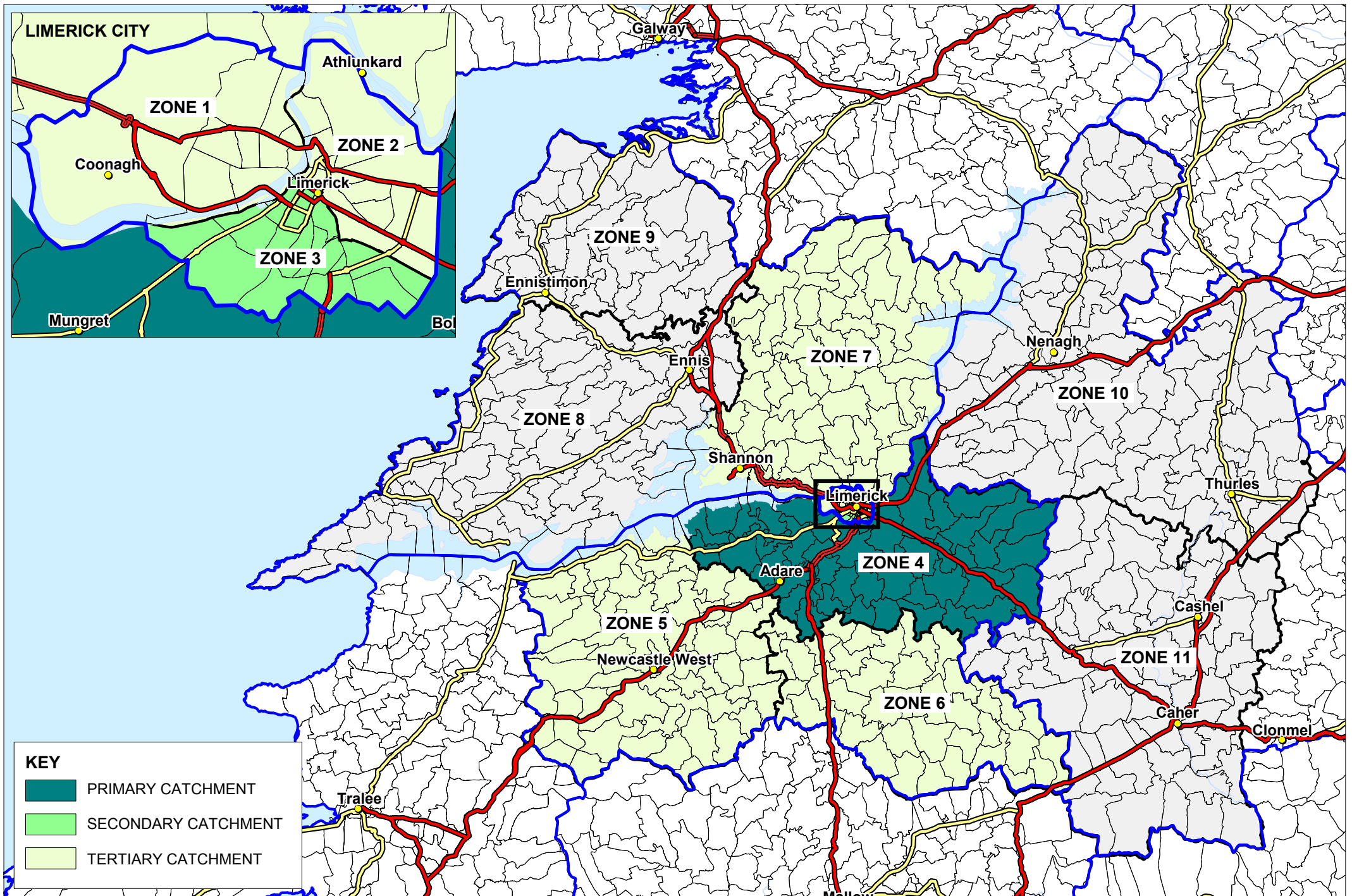


Fig. 4.12 Limerick City Centre: Catchment Area for Bulky Comparison Goods



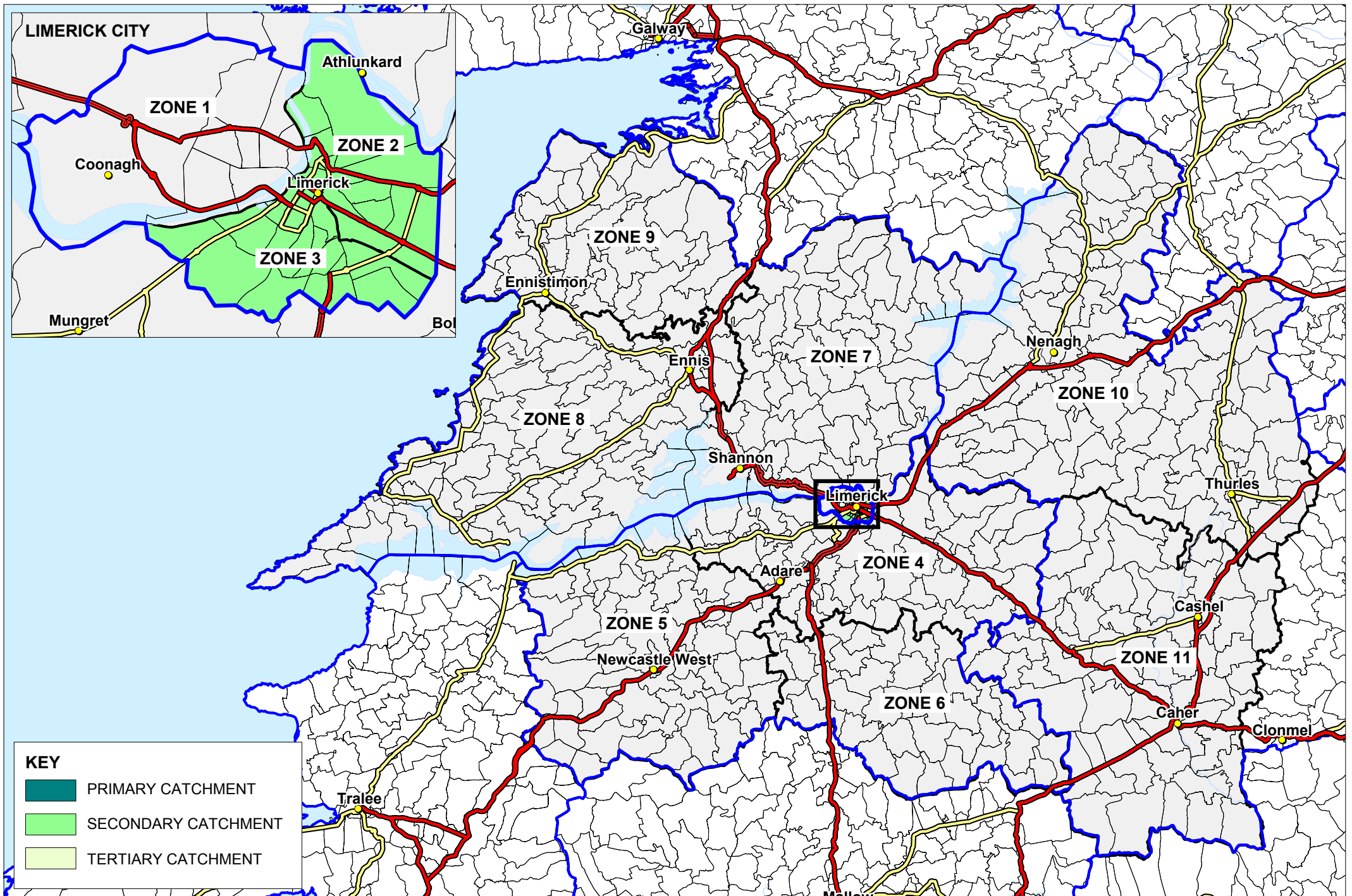
11 zones in total, of which three form its tertiary catchment. **Figure 4.13** overleaf shows the city centre's catchment for convenience goods shopping. Its almost negligible extent reflects the limited food offer available in the city centre, a characteristic typical of larger centres which trade mainly 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 floor space 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 floor space 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.<sup>1</sup> 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

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<sup>1</sup> 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 floor space 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 Councils are as 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.<sup>1</sup> The full *Oxford Economics* report, which explains the forecasting

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<sup>1</sup> *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
<b>Convenience Goods</b>	0.4	0.4	0.3
<b>Comparison Goods</b>	3.9	3.8	2.9
Non-Bulky	3.8	3.6	n/a
Bulky	4.2	4.1	n/a
<b>All Retail Goods</b>	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 <sup>(1)</sup>		Mid West <sup>(2)</sup>	
	Convenience Goods	Comparison Goods	Convenience Goods	Comparison Goods
<b>2009</b>	6.5	12.2	5.2	9.8
<b>2016</b>	8.1	13.9	7.3	12.5
<b>2022</b>	8.1	13.9	8.1	13.9

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

<sup>(2)</sup> 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.<sup>1</sup> 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

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<sup>1</sup> 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,<sup>1</sup> 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 floor space need assessment:-

- to estimate the turnover of retail commitments;

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<sup>1</sup> 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 <sup>(1)</sup>
<b>Non-Bulky Comparison Goods</b>	€7,000	€7,768
<b>Bulky Comparison Goods</b>	€4,000	€4,439
<b>Convenience Goods</b>	€10,000	€10,304

<sup>(1)</sup> 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 floorpace 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 floor space 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 floor space 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)<sup>1</sup>.
- 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.

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<sup>1</sup> 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 floor space 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 is 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,<sup>1</sup> looking across the region as a whole. Whilst the hierarchy is based upon the national retail hierarchy<sup>2</sup> 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

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<sup>1</sup> See Table 2.7 in Section 2.

<sup>2</sup> 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**

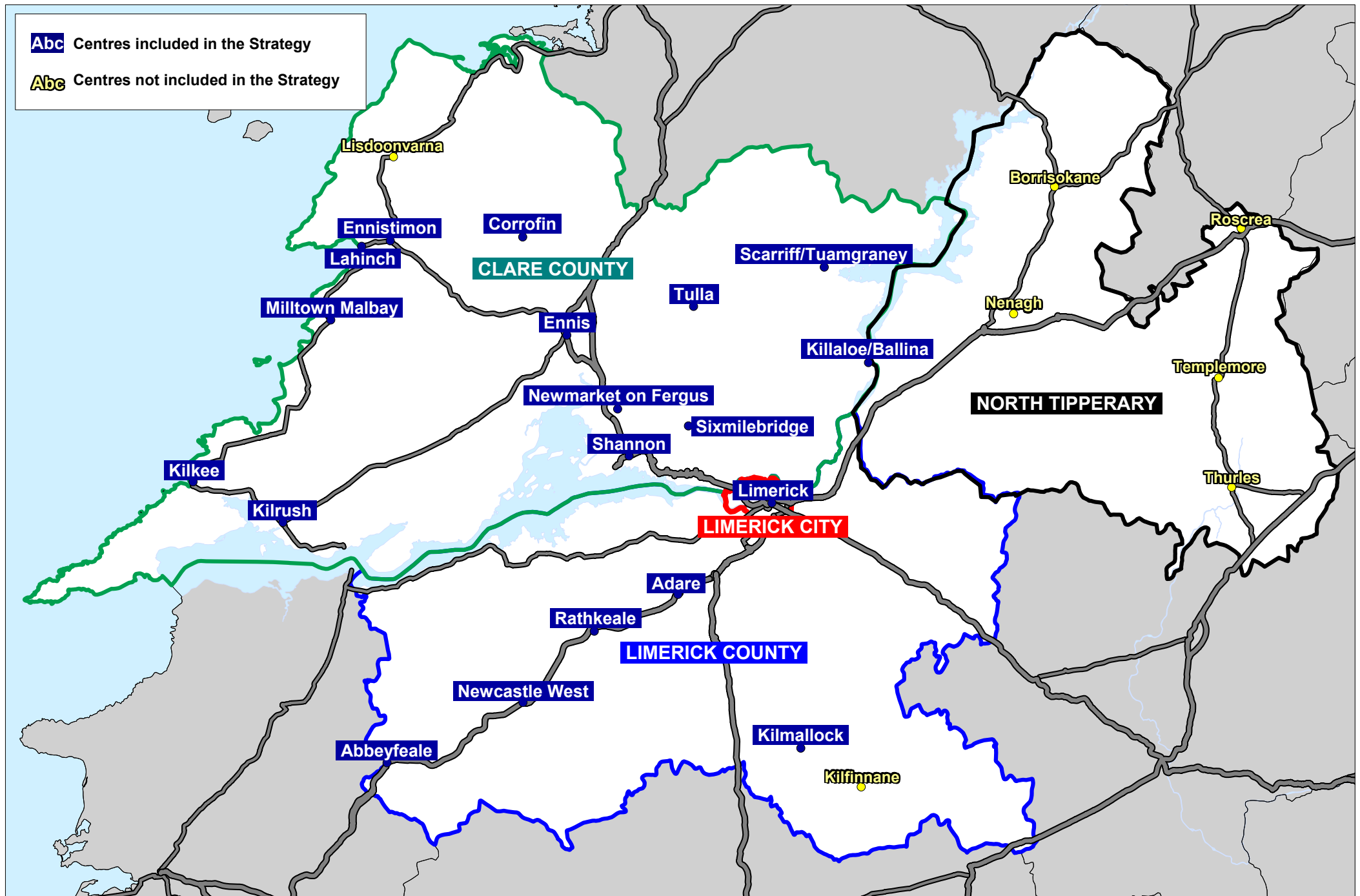
- 6.26 The shopping patterns within Metropolitan Limerick are complex due to the interaction between the city centre and the other centres within the urban area, in particular the Crescent Shopping Centre at Dooradoyle and Childers Road Retail Park. In the future it will be important to ensure that the 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;~~
- It is the policy of the Council to encourage reinvestment, upgrading and limited expansion of retail floorspace within the Crescent Shopping Centre where it does not alter its role and function with respect to Limerick City Centre and the retail hierarchy; (replace struck through text with underlined text, as amended by the Elected Members of Limerick County Council on 1st November 2010)
- 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 super market 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 may be 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 vertical 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 sequential sites are 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 plan 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/existing 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, 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 condition V 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 floor space (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.

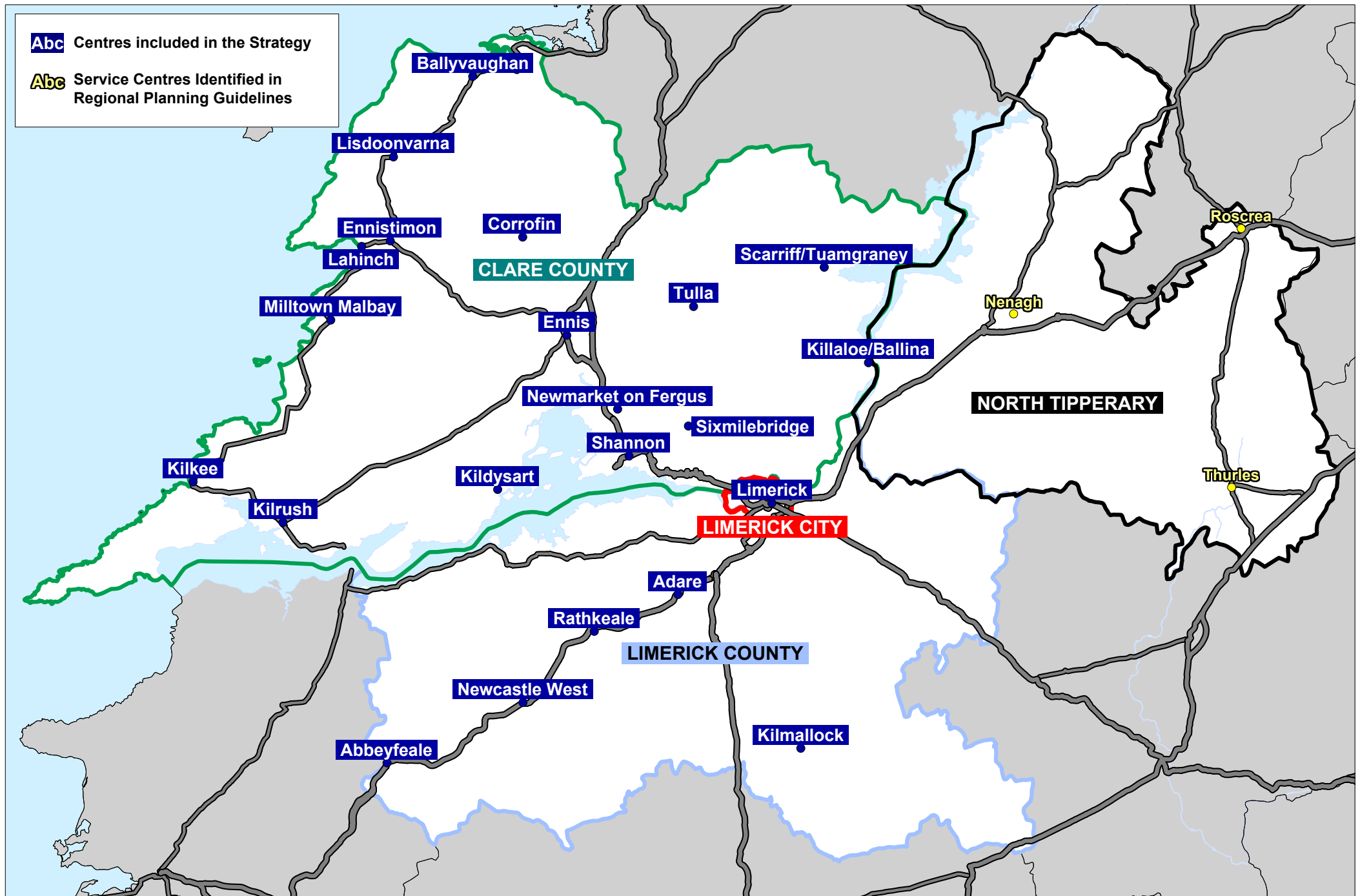


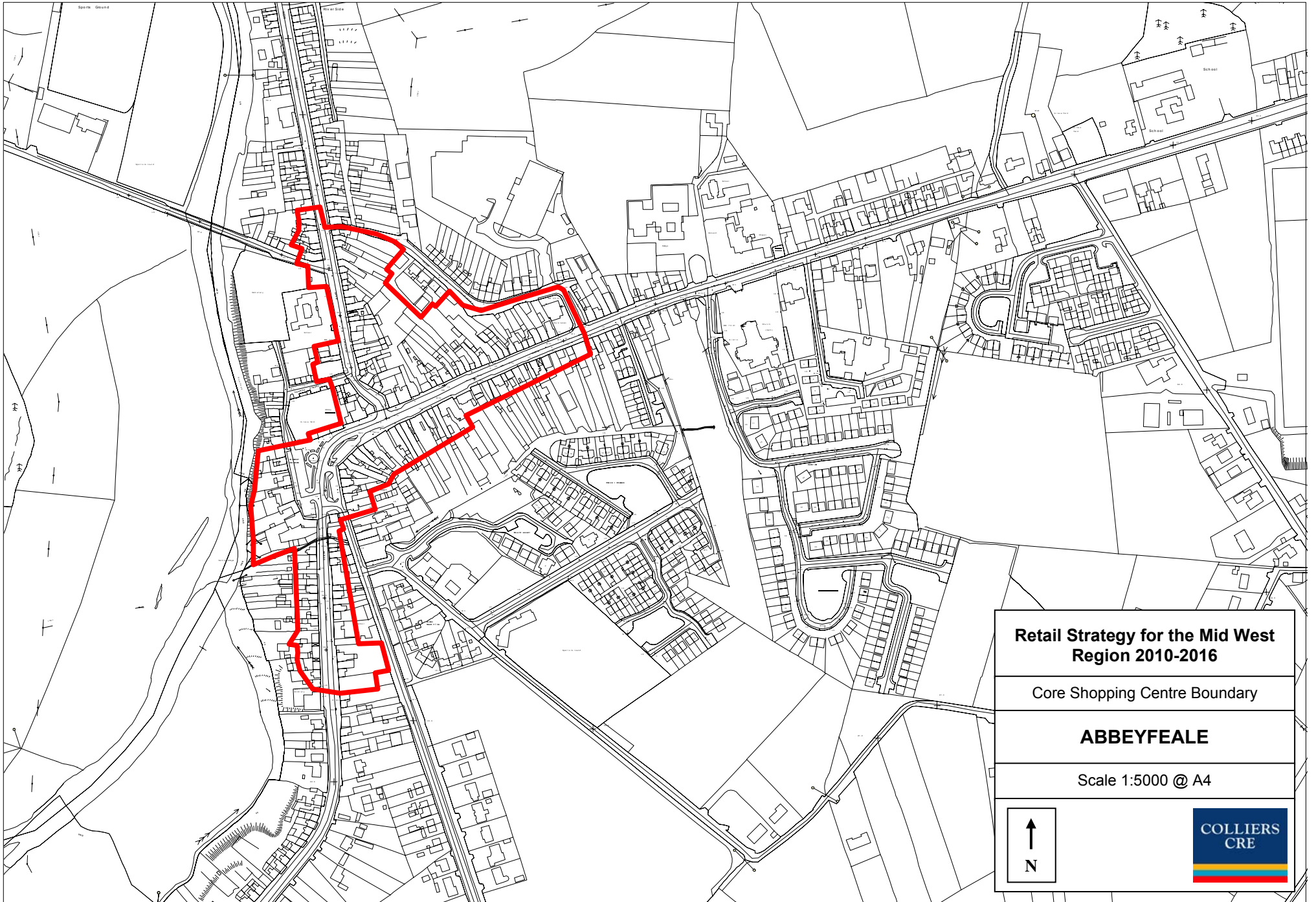
- 6.76 The improvement of Ennis Town Centre to provide modern retail accommodation is also supported, as is the provision of a more focussed bulky comparison goods provision in suitable designated areas.
- 6.77 The intention to improve and expand the shopping provision as set down in the Shannon Masterplan 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.

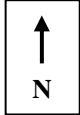

### **Maps**

- 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

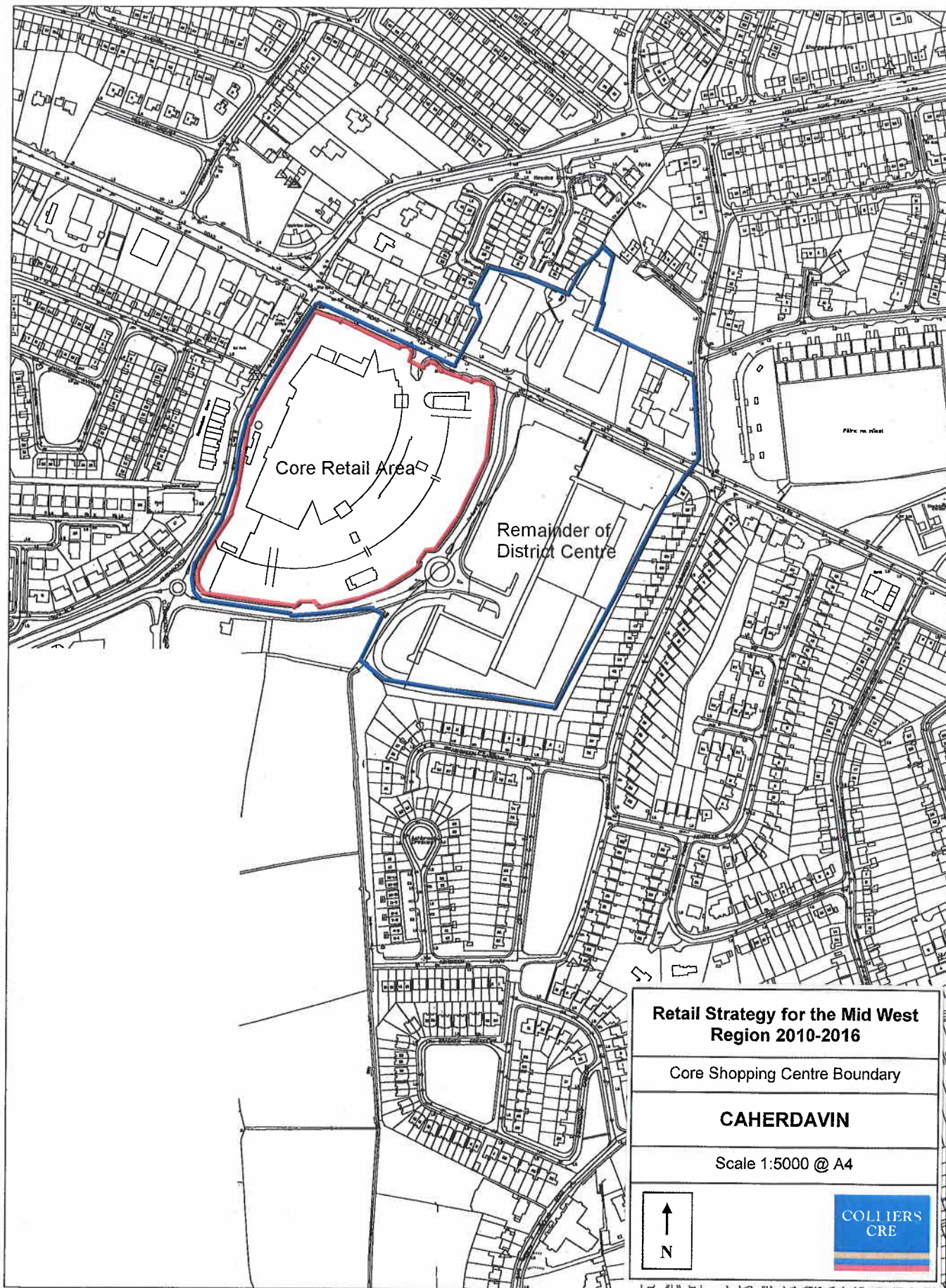




<b>Retail Strategy for the Mid West Region 2010-2016</b>	
Core Shopping Centre Boundary	
<b>ABBEEFEALE</b>	
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**Retail Strategy for the Mid West  
Region 2010-2016**

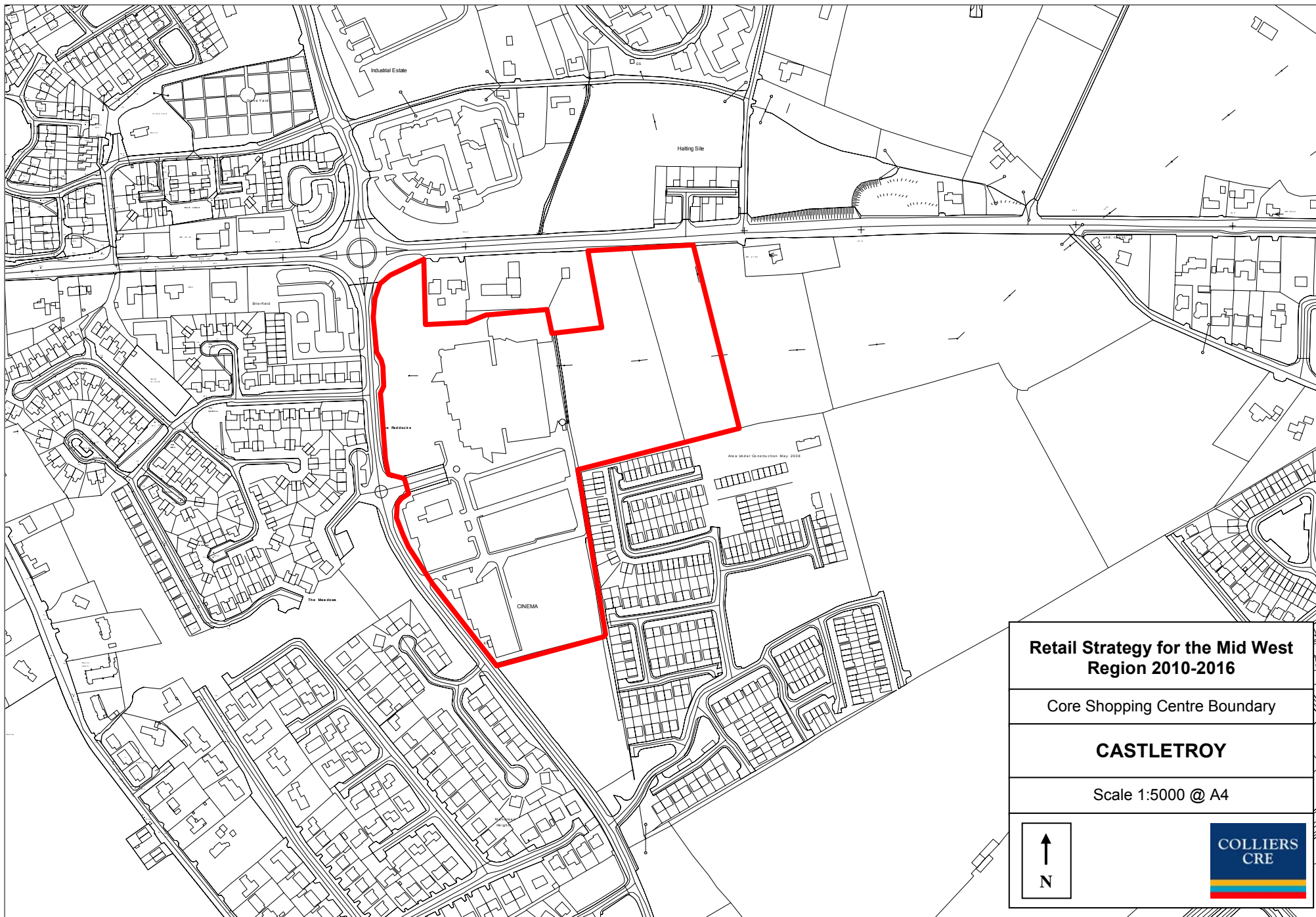
Core Shopping Centre Boundary

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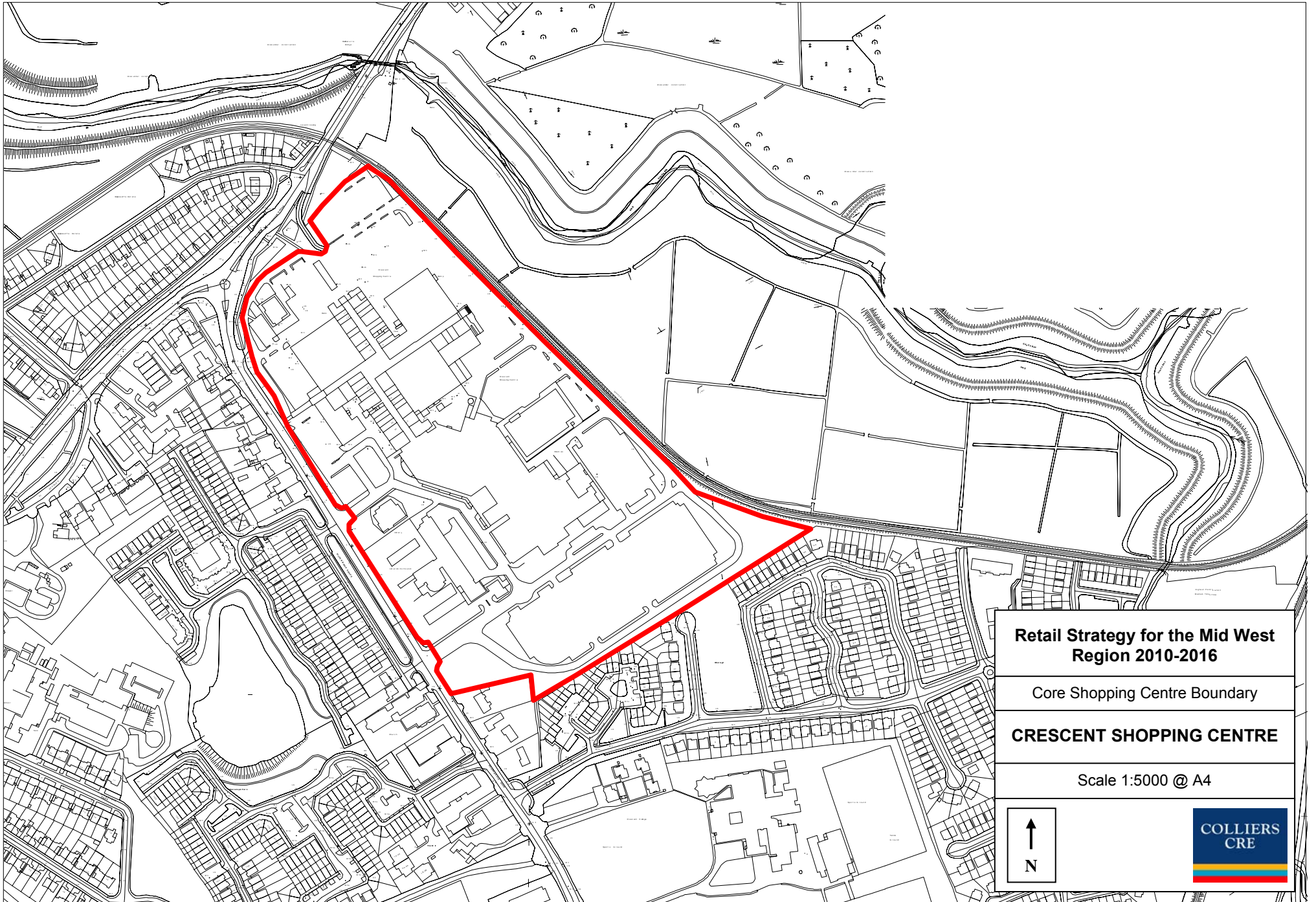
**Retail Strategy for the Mid West  
Region 2010-2016**

Core Shopping Centre Boundary

**CASTLETROY**

Scale 1:5000 @ A4





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

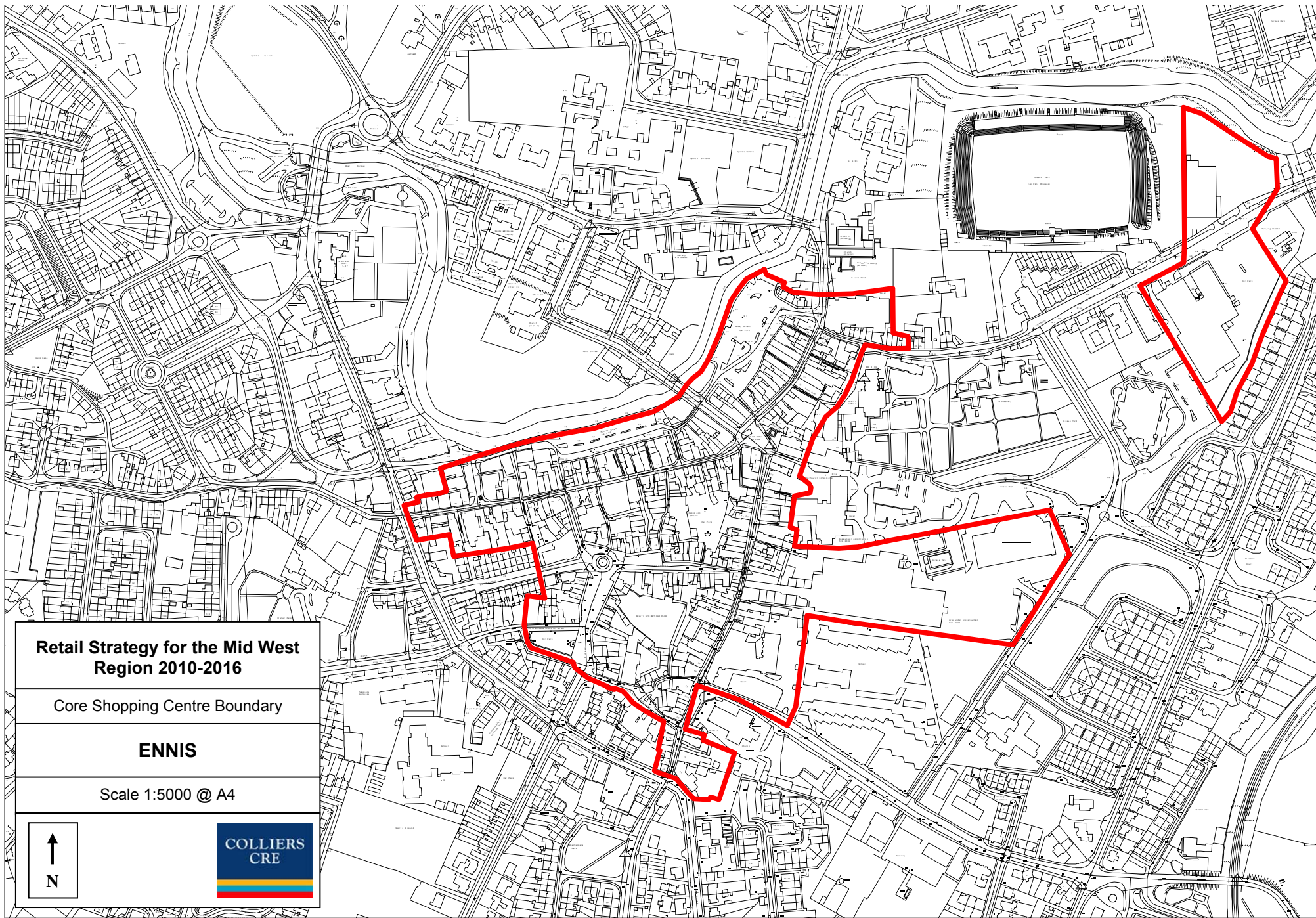
Core Shopping Centre Boundary

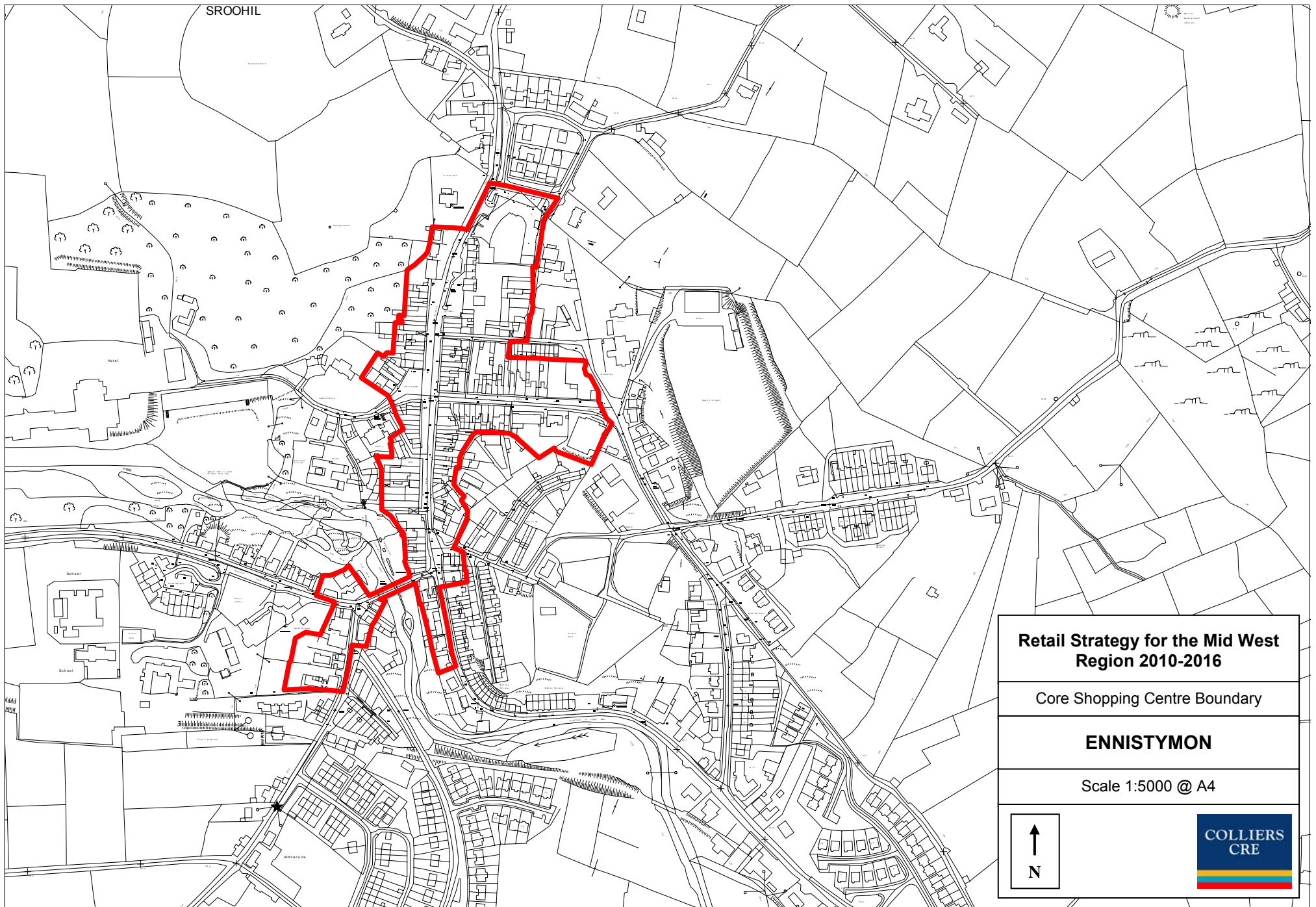
**CRESCENT SHOPPING CENTRE**

Scale 1:5000 @ A4

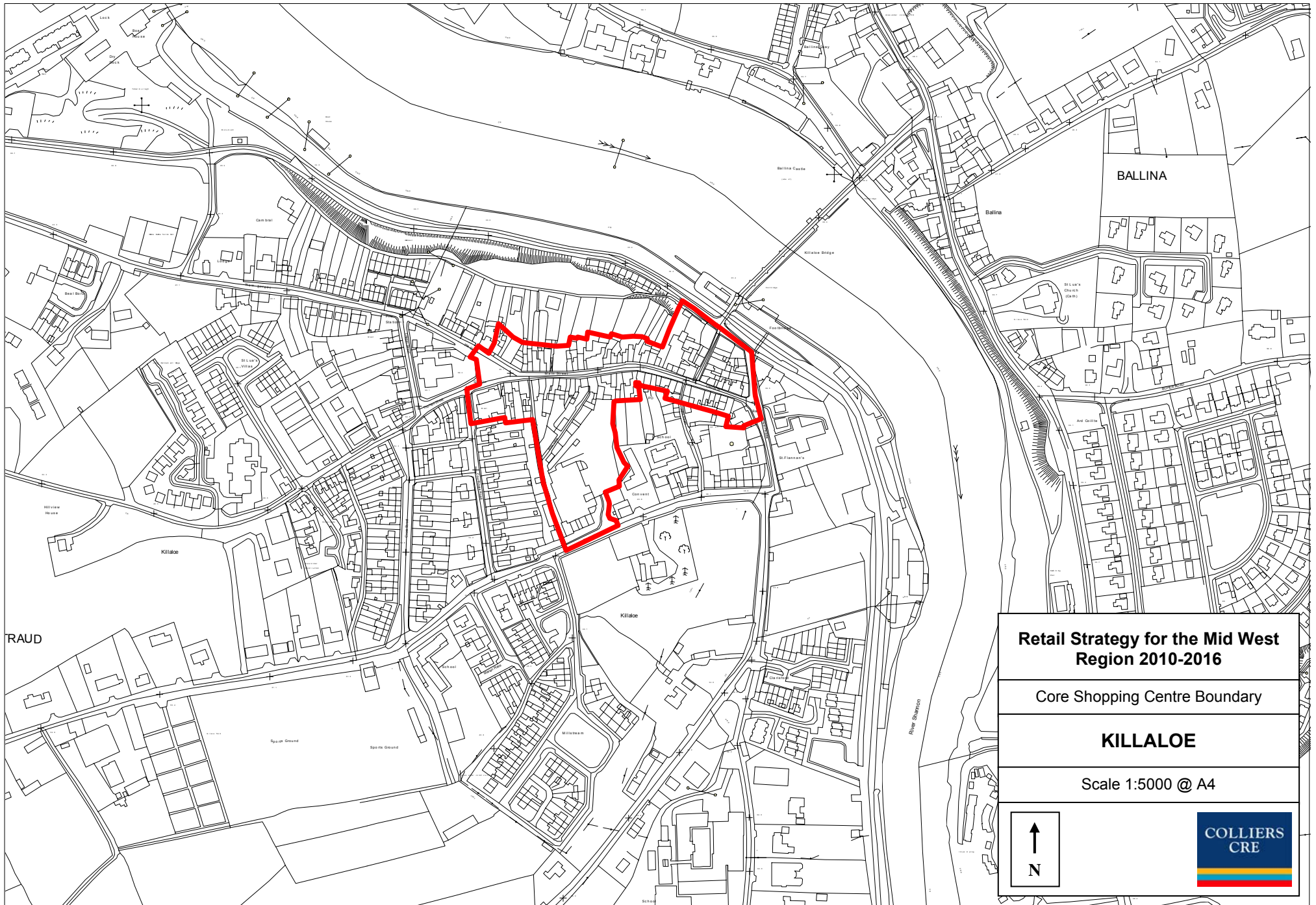


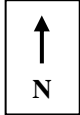



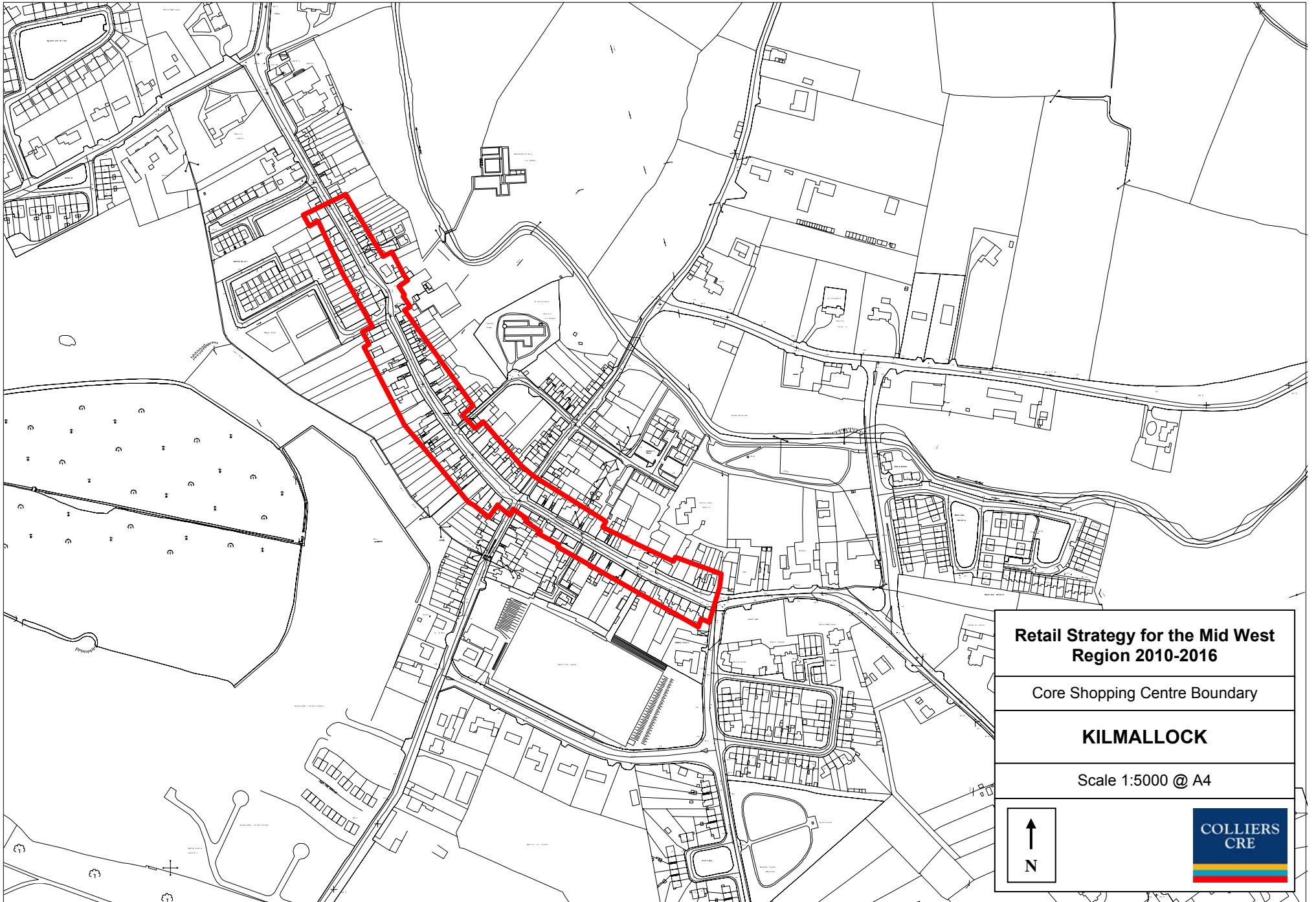


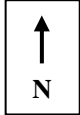


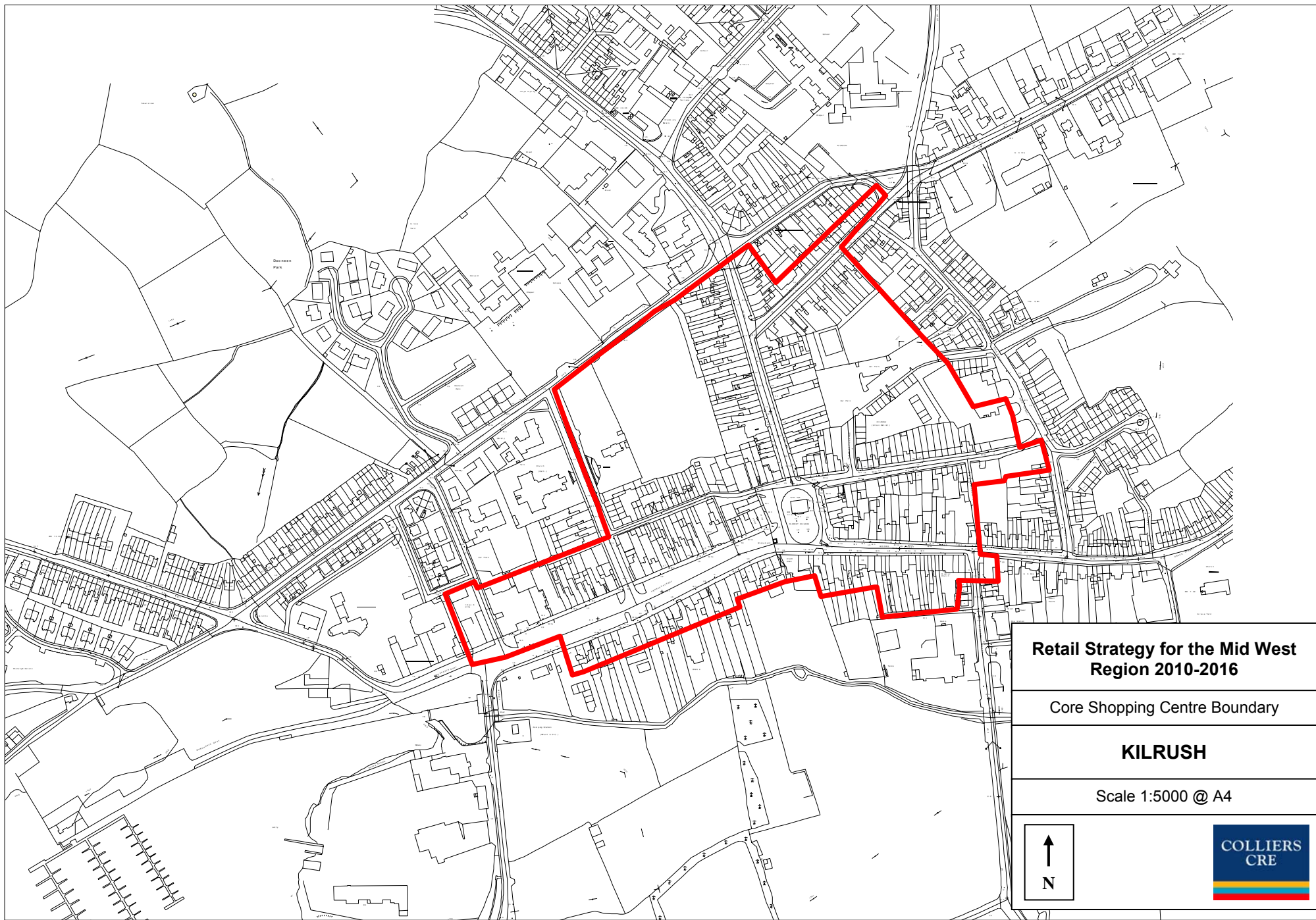


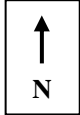



<b>Retail Strategy for the Mid West Region 2010-2016</b>	
Core Shopping Centre Boundary	
<b>KILLALOE</b>	
Scale 1:5000 @ A4	
	



<b>Retail Strategy for the Mid West Region 2010-2016</b>
Core Shopping Centre Boundary
<b>KILMALLOCK</b>
Scale 1:5000 @ A4
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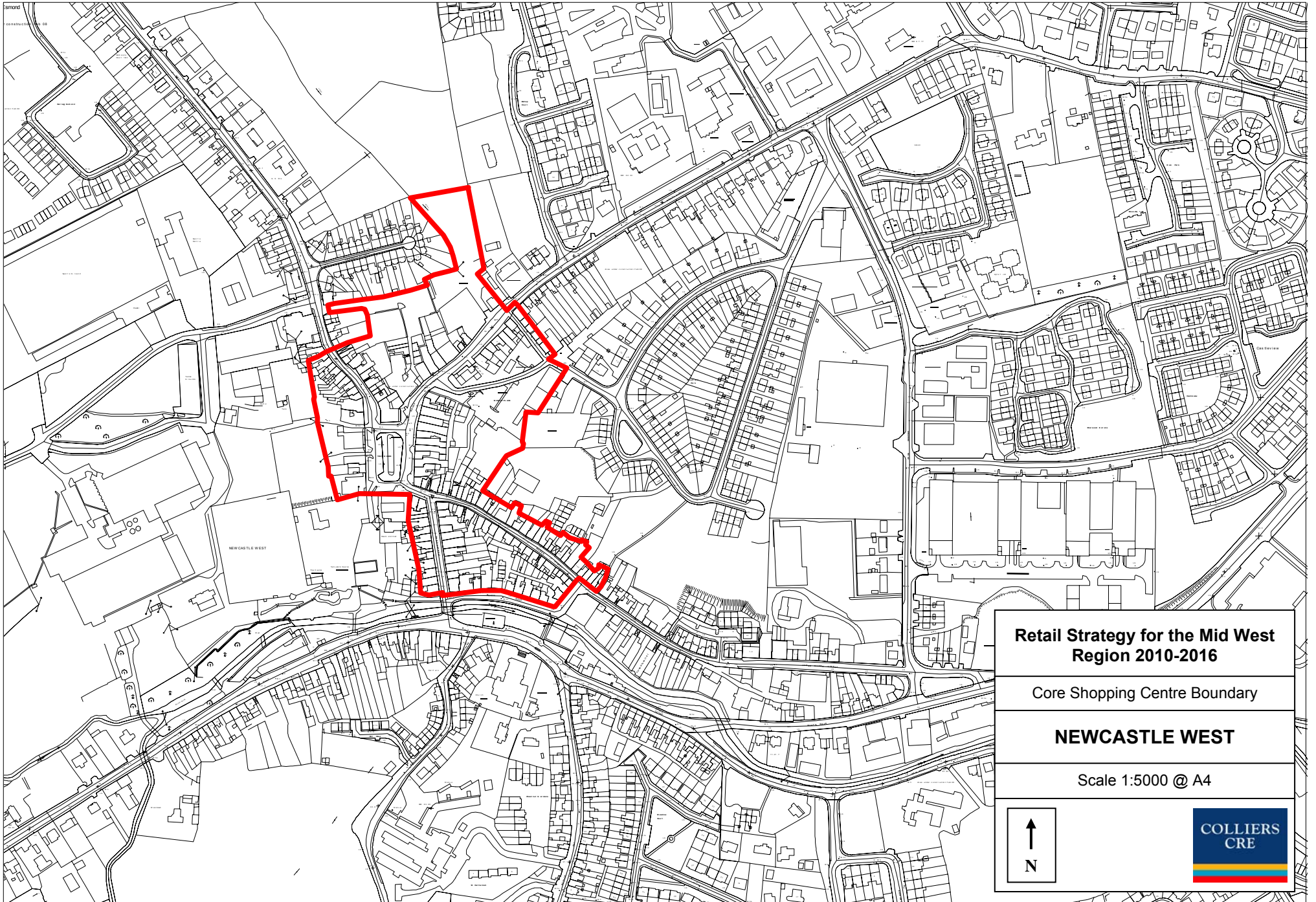


<b>Retail Strategy for the Mid West Region 2010-2016</b>	
Core Shopping Centre Boundary	
<b>KILRUSH</b>	
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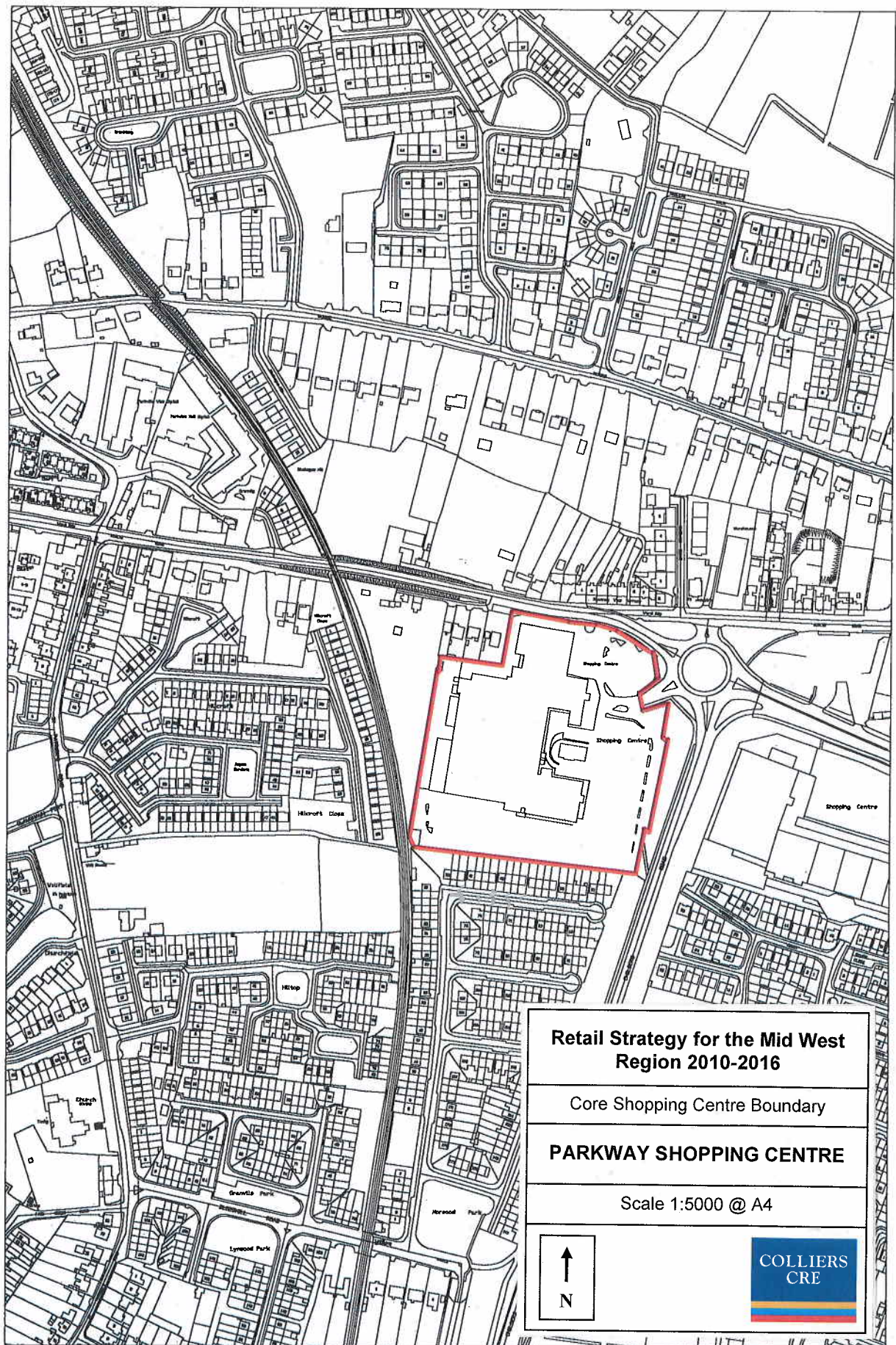


**AREA SUITABLE FOR  
TOURIST RELATED  
SHOPPING**

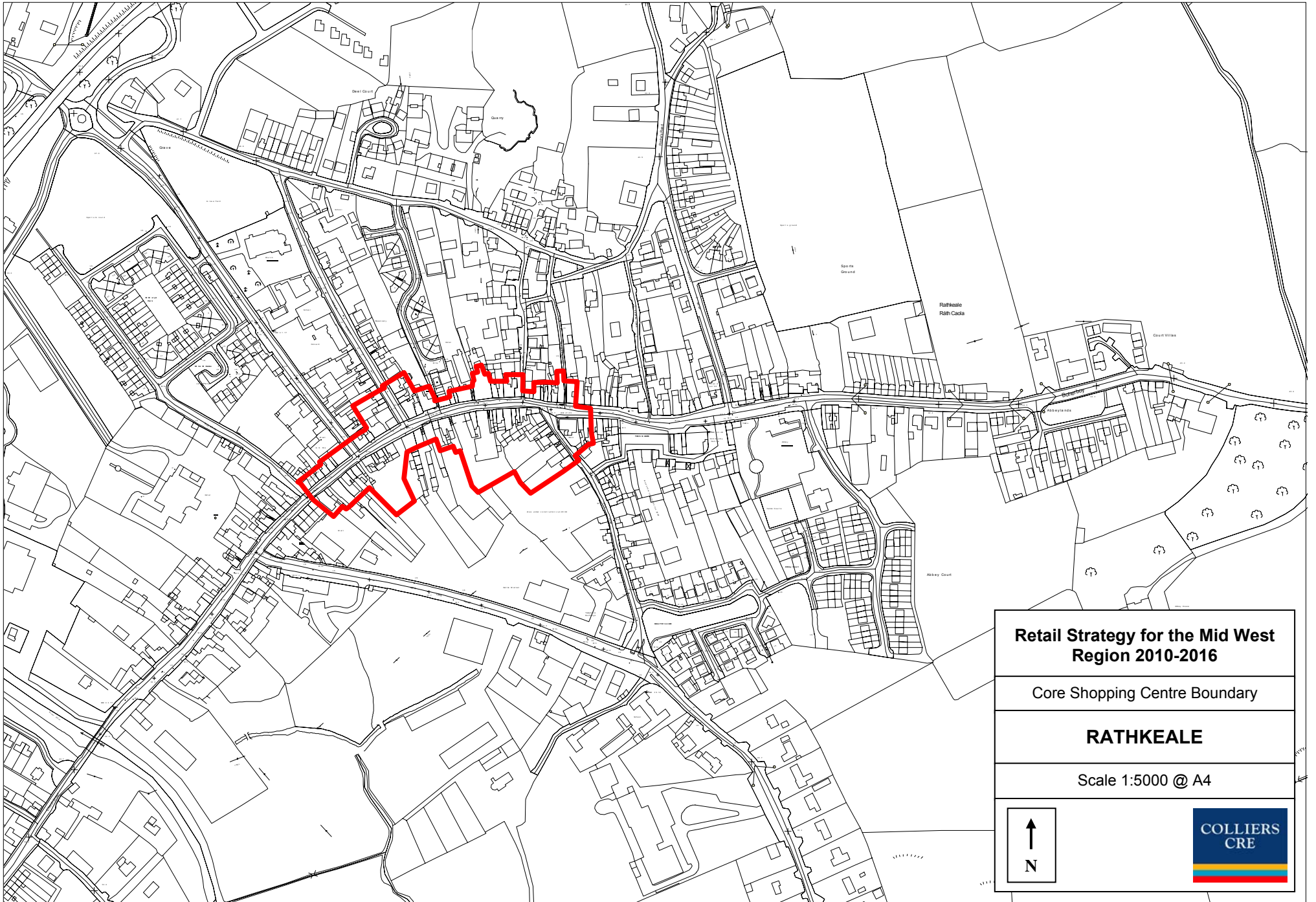


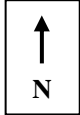



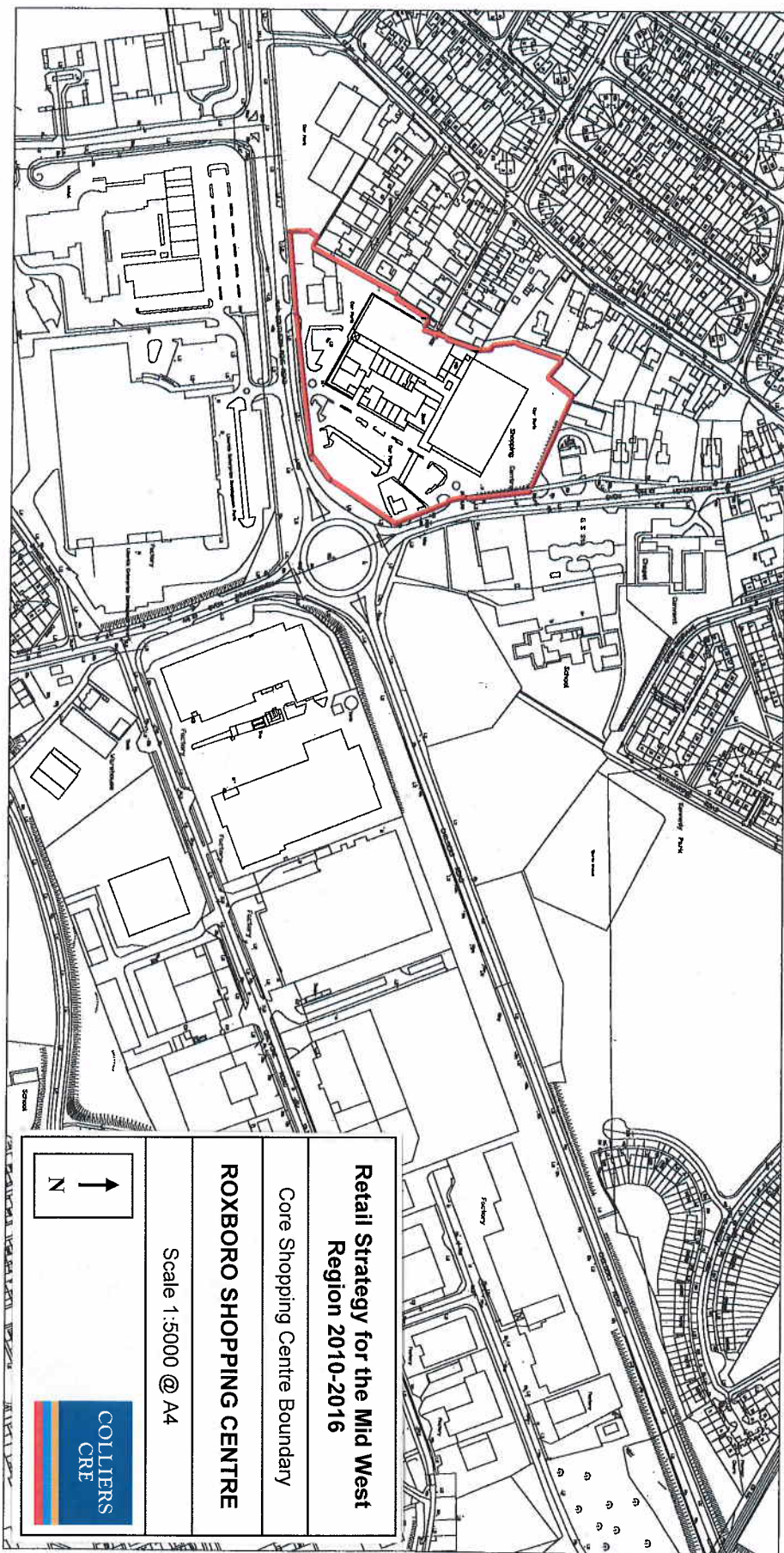








<b>Retail Strategy for the Mid West Region 2010-2016</b>
Core Shopping Centre Boundary
<b>RATHKEALE</b>
Scale 1:5000 @ A4
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**Retail Strategy for the Mid West  
Region 2010-2016**

Core Shopping Centre Boundary

**ROXBORO SHOPPING CENTRE**

Scale 1:5000 @ A4

