

**Clare County Council  
Limerick City Council  
Limerick County Council  
North Tipperary County  
Council**

**RETAIL STRATEGY FOR THE  
MID WEST REGION  
2002 - 2011**

February 2003



**Clare County Council  
Limerick City Council  
Limerick County Council  
North Tipperary County Council**

**RETAIL STRATEGY FOR THE  
MID WEST REGION  
2002 - 2011**

A Report  
by



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## CONTENTS

SECTION	PAGE
<b>EXECUTIVE SUMMARY</b>	
1. INTRODUCTION .....	1
2. KEY BASELINE FACTS AND ANALYSIS .....	9
3. BROAD ASSESSMENT OF ADDITIONAL FLOORSPACE .....	23
4. INFLUENCES ON THE STRATEGY .....	31
5. STRATEGIC RESPONSE – THE RETAIL STRATEGY FOR THE MID WEST .....	43

### APPENDICES

A - Glossary of Terms

B – Technical Appendix (Separate Document)

<b>Quality Assurance Record</b>	
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## EXECUTIVE SUMMARY

1. **DTZ Piedad Consulting**, in association with **DTZ Sherry FitzGerald** and **Lansdowne Market Research**, was appointed in November 2001 by Limerick County Council on behalf of its Mid West Region partners – Limerick City Council and Clare and North Tipperary County Councils – to prepare the Mid West Retail Strategy for the period 2001 - 2011. The Mid West Retail Strategy comprises the following documents:
  - Mid West Retail Strategy
  - County and City Retail Strategies
  - Technical Appendix.
2. The Strategy is prepared in accordance with the requirements of the *Retail Planning Guidelines for Planning Authorities* (RPG) published by the Department of the Environment and Local Government (DoELG) in December 2000 which states that County Limerick, County Clare and Limerick City should “*jointly prepare comprehensive retail strategies and policies*”. To enable the retail needs, opportunities and issues of the whole of the Mid West Region to be addressed, North Tipperary County Council’s jurisdiction was included in the study area for the Retail Strategy.
3. For the first time in respect of retail planning in the Mid West, there are national policy guidelines and the detailed baseline information to enable the development of Regional and County/City Retail Strategies that respond to the issues and potential of the period to 2011 and beyond. To achieve this at a regional level without an established framework of Strategic Planning Guidelines is a challenge and one not embraced by any other region in the country. It is therefore a positive first step that the local authorities in the Region have committed to the preparation of this Strategy. It must be taken as an initial framework that through monitoring and review will in the period to 2011 become more refined and responsive as information is enhanced and its influence becomes apparent.

## KEY BASELINE FACTS AND ANALYSIS

4. The baseline information for the Regional and City/County Strategies was gathered through specially commissioned floorspace, household and shopper surveys, health checks of the main centres in the Region, consultations and desk-based research. The baseline review and assessment for the Strategy was completed in May 2002. However, in the later stages of the study the preliminary results from the April 2002 Census of Population and the National Spatial Strategy(NSS) were published, both of

which have important relevance to population data and forecasts that underpin the Regional and County/City Retail Strategies and hence, where possible, have been taken into account in the preparation of the strategies.

5. The Regional Strategy examines the main baseline information for the Mid West in respect of population levels and forecasts, income levels, the quantum and distribution of retail floorspace, shopping patterns and expenditure flows. The key findings are summarised below.
6. **Population:** based on the preliminary results of the Census of Population, the Mid West had a population of 339,930 persons in 2002, representing an increase of 7.2% since 1996. The increase was not evenly spread across the Region with only County Clare(9.9%) having a growth rate above the Mid West average. In Limerick County, including the City's administrative area, population grew by some 6.4% over the period. From the preliminary Census results, there would appear to be a trend of continued movement of population in the County towards a 10 mile radius of Limerick City, putting pressure on the areas adjoining the City, its Environs and smaller settlements. In North Tipperary, growth was lower than the Regional average at 5.3% but a greater increase was found in Nenagh than for the Mid West.
7. **Retail Floorspace:** the survey of retail floorspace in the main towns in the Region is summarised in the table below. It illustrates that 27% of the Mid West's floorspace was convenience, 55% comparison and 12% bulky goods/retail warehousing, with the remaining 6% recorded as vacant. Some 56% of the Region's total floorspace was found to be in the Limerick Metropolitan Area (the City and Environs) with just over 34% located within the City Centre.

<b>Composition of Net Retail Floorspace (m<sup>2</sup>) in the Mid West</b>					
<b>Town</b>	<b>Total Area</b>	<b>Convenience</b>	<b>Comparison</b>	<b>Retail Warehousing</b>	<b>Vacant</b>
Clare	47,934	12,687	23,804	8,649	2,795
North Tipperary	57,149	21,443	30,024	4,246	1,437
Limerick County & City	161,296	38,456	92,442	18,660	11,639
<b>Mid West Region</b>	<b>266,380</b>	<b>72,684</b>	<b>146,270</b>	<b>31,554</b>	<b>15,872</b>
<b>Source:</b> DTZ Sherry FitzGerald Floorspace Survey December 2001					

8. **Shopping Patterns and Expenditure Flows:** some 969 randomly selected household telephone interviews were undertaken across the Mid West and 1,130 face-to-face on street interviews in the Region's twelve largest towns and shopping centres. The surveys found that a limited number of residents in the Mid West were travelling to areas outside the Region for non-food items, while none were found to travel outside for food items. Limerick City was found to be dominant in the Region for clothing and footwear and bulky goods shopping which reflects its role as a higher order comparison centre in the national retail hierarchy. The shopper surveys indicate the self-contained nature of the catchment area for the Mid West, with a very small

proportion of people surveyed coming from outside the Region. Given that the surveys were undertaken in January and February 2002, then they would not have captured the true picture of the Region's tourism attraction and potential and this has been taken account of in the preparation of the Regional Strategy.

## BROAD ASSESSMENT OF ADDITIONAL FLOORSPACE

9. The capacity assessment is the mechanism used to estimate the amount of additional expenditure that will occur in the Mid West over the period of the Retail Strategy and the type and amount of additional floorspace that will be required in order to accommodate this expenditure. The figures in the table below indicate the significant capacity for additional retail floorspace in the Region over the period to 2011, particularly in respect of comparison floorspace. They incorporate an allowance for any planned development of new retail outlets, turnover efficiency and the impact of growth in Internet sales. The assessment is based on revised population forecasts founded on the preliminary results of the 2002 Census of Population and consideration of the targets set in the NSS. This exercise was also carried out for the individual County and City Retail Strategies.

<b>Indicative Net Floorspace Capacity – Mid West (m<sup>2</sup>)</b>				
<b>Period</b>	<b>Convenience</b>		<b>Comparison</b>	
	<b>Low</b>	<b>High</b>	<b>Low</b>	<b>High</b>
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>

## INFLUENCES ON THE STRATEGY

10. In preparation of the Mid West Retail Strategy there are a number of national, regional and local influences that require to be given due regard. National plans strategies and guidelines, along with statutory development plans, County/City Development Board Integrated Strategies and land use and transportation plans have all been reviewed in the preparation of the Regional and County/City Strategies. The household and shopper surveys provide valuable information on the strengths and weaknesses of retailing in centres across the Region, while emerging trends and new forms of retailing across the country have also been reviewed in the context of the Region's current profile and potential. In addition, Members of the County, City and Town Councils in the Mid West took part in a Consultation Seminar which addressed strategic issues and those specific to individual centres and counties and these were also taken into account in the preparation of the Regional and County/City Strategies.

## STRATEGIC RESPONSE – THE RETAIL STRATEGY FOR THE MID WEST

11. This Strategy is intended to set out an **integrated strategic framework** for retail planning in the Mid West over the period to 2011 that should be translated at the County/City level in retail strategies and development plan variations that are specific to the different local authority areas. The **overall objective** of the Mid West Retail Strategy is to provide strategic guidance on the location and scale of new retail development and to achieve a distribution which is efficient, equitable and sustainable.
  
12. The **aims** of the Regional Retail Strategy respond to the influences of national and local policy and the issues and opportunities that prevail at a Mid West, local authority and specific centre level. They are as follows:
  - i To provide an integrated and sustainable approach to retail planning and development across the Region that respects the existing or emerging settlement hierarchy, with specific reference to the objectives of the NSS, and provides the means to strengthen and reinforce this;
  - ii To ensure that the Regional Retail Strategy provides the vision and framework to improve the retail competitiveness and attraction of the Region and its centres, redress leakage of resident expenditure, encourage retail innovation and achieve more sustainable shopping travel patterns;
  - iii Confirmation that the focus on the town centre(including within this definition Limerick City Centre) is one of the most significant influences on retail planning and development in the Region;
  - iv Definition of a regional retail hierarchy that gives guidance as to where major new floorspace and the nature of that floorspace should be located and that this should be appropriate in scale and character to the hierarchical role of the centre;
  - v Protection of the importance of Limerick City Centre in accordance with its position within the national retail hierarchy, specifically in respect of its high order comparison shopping role;
  - vi To recognise the role and importance of the major retail centres around Limerick City Centre and the City's Environs in the Region's shopping offer and attraction by providing a strategic framework that is determined by shopping patterns, supply and potential rather than administrative boundaries;
  - vii Strengthening the role of other centres outside the Limerick Metropolitan Area, particularly those in the upper levels of the hierarchy, to reduce leakage to the Metropolitan Area, better meet needs in the rural Hinterland Area and assist in the sustaining and enhancement of their retail potential and offer.

Where appropriate, specific consideration should be given to centres identified as key centres in the Limerick PLUTS study, acknowledging that this did not cover all of the Region;

- viii To recognise the great importance of tourism in the Region's economy and the important role centres at all levels of the hierarchy play in the Mid West's offer. The retail strategies should provide the catalyst for enhancing and improving the attraction of centres for shopping and other leisure activities;
- ix Provide the policy framework/principles to ensure that the needs and potential of all centres in the hierarchy and their catchment areas are addressed;
- x To recognise the particular shopping issues and needs of rural communities and ensure that there is a policy framework that encourages and provides for these being addressed and met in respect of convenience and comparison floorspace;
- xi To provide the policy framework which recognises that in the absence of suitable and available town centre sites then to enable competitiveness to be sustained and needs to be met then alternative sites will require to be considered, subject to the sequential approach and the assessment criteria set down in the Strategy;
- xii In accordance with the RPG, recognise that some forms of retailing may be inappropriate for a town centre location and in the interests of enhancing choice, competition and innovation, they should be accommodated in locations offering good levels of accessibility by both private and public transport; and
- xiii To set within a framework of strategic principles how the quantum of spend and hence new floorspace should be distributed at a local authority level.

### **Strategic Policy Framework**

- 13. To achieve the Strategy's aims requires due cognisance to be taken of the strategic policy framework that underpins specific policy proposals. This framework is set by the consideration of need, the retail hierarchy, the sequential approach, the definition of core retail areas and the spatial distribution of new retail development.
- 14. **Consideration of Need:** the population and expenditure forecasts that underpin the retail capacity assessment indicate that over the period of the Retail Strategy there will be substantial amounts of expenditure within the Mid West to support both existing convenience and comparison floorspace, that in the pipeline and significant levels of new floorspace. Need and potential is further indicated when considering the timescale over which it should be delivered is highlighted i.e. the period to 2011.

15. **Retail Hierarchy:** this is based on a detailed review of existing settlement characteristics, the RPG national hierarchy, regional and local policies and consultations with Members. The resulting Regional Retail Hierarchy is set out below.

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, Castletroy 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> Roscrea  <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.)
<b>Note:</b> * Small Towns and Village Centres are all those below the 1,500 population threshold set for Tier 4 centres in the RPG hierarchy		

16. **Sequential Approach:** policies and proposals in respect of the location of retail development must be in accordance with the principles set by the sequential approach in the RPG where the priority is town centres, then edge of centres and finally out of centre locations. The core retail area is thus an important determinant in the approach.
17. **Definition of Core Retail Areas:** is a requirement of the RPG, with the emphasis on the main centres in the retail hierarchy. The definition of the boundaries of the core

retail areas is not the role of the Regional Strategy but is a detailed aspect of County/City Retail Strategies and development plan variations. The core retail area of a centre is the area that achieves the highest rentals, the best yields, is highest in demand from operators, is overwhelmingly retail floorspace and has the highest footfall of shoppers.

18. **Spatial Distribution of New Retail Development:** the emphasis of the Retail Strategy is on strategic guidance on the location and scale of **major** retail development. It does not seek to inhibit small scale retail development in centres around the Region, particularly that which contributes to achieving a better mix of convenience/comparison shopping in smaller centres. The retail hierarchy sets the framework for the spatial distribution of major strategic developments across the spectrum of retail sectors and formats identified in the RPG. In accordance with the principle of the retail hierarchy, this will be predominantly distributed to centres in the upper tiers of the Regional and County/City Retail Hierarchies.

### Principles

19. Accepting the Regional Strategy should be taken as an initial framework for guiding retail planning, there are some general principles that underpin the thrust of the Strategy and the component County/City Retail Strategies. These are summarised below.
20. **Market Share and Trade Draw:** as the starting point, it is assumed that the net share of expenditure available across the different local authority areas will remain constant based on current shopping patterns over the timescale of the Strategy. Clearly, this does not reflect the objectives that will come through in the individual County/City Retail Strategies where the emphasis will be on redressing expenditure outflows/leakage. These are objectives supported by this Strategy and is a sustainable aim insofar as it will reduce the demand for travel. However, as all of the local authorities in the Region will seek to do this then the only assumption at this stage is that the baseline position will remain constant – future monitoring and review will enable refinement.
21. **Transportation Infrastructure:** the PLUTS study of the Limerick Region, which forms a core part of the Mid West, provides the strategic guidance for the provision of transport infrastructure. It is unlikely that within the timescale of the Strategy the necessary roads and public transport infrastructure will be in place to accommodate the increased traffic flows and demand that will stem from delivery of the level of additional retail floorspace the capacity assessment indicates, apart from in a few locations. Creative engineering solutions, combined with traffic management and public transport initiatives, will be partially able to address the issues. They will not however be able to wholly facilitate the retail potential of the Mid West and its main centres being delivered but nevertheless must be given priority.

22. **Limerick Metropolitan Area:** comprises Limerick City and Environs and includes parts of Counties Limerick and Clare. It requires to be considered as an integrated retail planning unit within the Regional Strategy. Given the pressures for development that are in the pipeline and can be anticipated, it is important that a strategic approach to determining the location of new floorspace is jointly adopted by the City and Limerick and Clare County Councils. This will require the involvement of North Tipperary County Council given the influence and implications of any large scale development in the Metropolitan Area on the County's shopping patterns. As with other regional capitals, not all of the floorspace required to meet the needs of residents in the City or the Region have been or can be met within Limerick City Centre. The City Centre is currently constrained in its potential to achieve the aims of this Strategy without a major expansion of its retail heart and roads and public transport issues being resolved. Many of the retail needs of the Metropolitan Area and the wider area are met in edge of centre and out of centre locations. For the City as a whole to sustain its importance, given that expansion of the heart of the City Centre must be seen as a longer term objective of the Strategy, then improvement and enhancement of existing suburban shopping centres plus the development of new retail areas must be part of the Regional Strategy.
23. **Achieving the Right Balance:** given the constraints to bringing forward town centre sites and expansion in the main centres, there is pressure for edge of centre and out of centre development. This will continue to be a characteristic of retail planning and will not disappear when sites and areas are brought forward in town centres. The County/City Retail Strategies should address the facts and ensure that the mechanisms for achieving the right balance between meeting needs and sustaining vital town centres are put in place.
24. **Importance of Flexibility:** as the pen portraits of the key facts in respect of the County/City Strategies illustrate, there are a mix of constraints within different centres that are likely to delay development. It is important that this position is monitored and that expenditure/capacity potential is redistributed around the other main centres in the Region.

### **County/City Strategies**

25. The translation of the principles and considerations summarised above are outlined for the different strategic planning units in the paragraphs that follow. Detailed application of these and the floorspace capacity estimates are provided in each of the County/City Retail Strategies.
26. **Limerick Metropolitan Area:** although the priority should be the City Centre, from review of sites and potential, it is clear that there are not readily deliverable major opportunities in or on the immediate edge of the City Centre. Realistically from a standing start, it will be the second half of the Strategy from 2007 onwards before any

major development within this area, or others around the heart of the City Centre, is underway and trading. Given that with Shannon, Limerick is identified as a gateway in the NSS then it is important that the needs of the Limerick Metropolitan Area are looked at to 2011 and beyond in terms of retail planning. The nature of any new retail floorspace should be predominantly comparison, and higher order comparison, if the offer is to remain competitive and attractive to residents and visitors/tourists alike. In the period to 2006 and early post 2007, the majority of new retail floorspace will thus require to be located in the City's Environs if the Metropolitan Area's role and importance is to be sustained. This is where most of the new convenience floorspace should be located but additionally there will be a need to continue to expand and improve the comparison offer.

27. **Remainder of Limerick County – the Hinterland Area:** the potential of the Hinterland Area is significant given the relatively limited offer that currently exists. There is a need to strengthen the quality and quantum of convenience floorspace in the main centres in the County's Hinterland Area. The first priority should be in Newcastlewest and this is where interest should be directed in the period to 2006 and in fact beyond. This is equally true in respect of comparison floorspace, acknowledging that development plan zonings alone cannot achieve the objectives of this Strategy and that of the County. The priority accorded to the main centre should however not prejudice delivery of convenience, comparison or mixed developments in the Hinterland Area Level 3 and 4 centres in the Regional Retail Hierarchy, particularly in the growing centres around the Metropolitan Area in order that needs can be better met locally.
  
28. **Clare:** in terms of the distribution of new large scale retail floorspace, the focus should be on the two Tier 2 centres in the Regional Retail Hierarchy, namely Ennis and Shannon. Their importance is further recognised in their designation as a hub and a linked gateway respectively in the NSS. The priority accorded to the two centres should not inhibit further retail development in Kilrush or lower order centres that is appropriate to where these centres sit in the Regional and County Retail Hierarchies. Ennis will however have difficulty in achieving expansion of its retail offer prior to 2006 but this can be achieved through relocations and regeneration of edge of centre sites, although the delay in the town's bypass is a major issue. Shannon has the scope and potential to secure a major expansion of the town centre within the early years of the Strategy. It needs to grow into the role that it should be performing and this Strategy provides the strategic policy framework to enable this. Clare is a predominantly rural county. It is therefore important that, through the Mid West and County Retail Strategies, the policy framework is put in place to encourage retail development and enhancement across the County which is in accord with the settlement hierarchy set down in the County Development Board's Integrated Strategy for social, economic and cultural development.
  
29. **North Tipperary:** the priority must be sustaining and diversifying the offer of the key centres in the hierarchy, with priority given to Nenagh and Thurles as both are

acknowledged as serving specific geographical areas of the County. There should be particular emphasis on comparison floorspace. In parallel, there is a need to enhance and grow the retail offer and attraction of Roscrea and this interest is confirmed by the market interest in the town. All of the key centres in the County face issues in respect of delivering sites and areas of the appropriate size and location in their town centres before 2006. The potential is there in the longer term provided that there is a commitment to site assembly of the lands that sit behind or close to the core retail areas in each of these centres. In the interim, it would be appropriate to identify edge and out of centre sites in Nenagh and Thurles in particular, given that these are designated as the highest order centres in the County.

## 1. INTRODUCTION

- 1.1 **DTZ Piedad Consulting**, in association with **DTZ Sherry FitzGerald** and **Lansdowne Market Research**, was appointed in November 2001 by Limerick County Council on behalf of its Mid West Region partners – Limerick City Council and Clare and North Tipperary County Councils – to prepare the Mid West Retail Strategy.

### CONTEXT FOR RETAIL STRATEGIES

- 1.2 In accordance with the “*Retail Planning Guidelines for Planning Authorities*”, published by the Department of the Environment and Local Government (DoELG) in December 2000, local authorities are required to prepare retail strategies. The guidelines were issued as Ministerial guidelines under Section 28 of the Planning and Development Act 2000. Section 28 provides that planning authorities and An Bord Pleanála shall have regard to Ministerial guidelines in the performance of their functions.
- 1.3 The Retail Planning Guidelines (RPG) were prepared in response to the increasing pressure for retail development in the last decade. They sought to provide the policy framework to enable the future development that is projected to be accommodated in a way that is ‘*efficient, equitable and sustainable*’.
- 1.4 The guidelines acknowledge that there is a difference between the range of issues faced by urban and rural areas. They state that it will be necessary for the more urban counties to prepare retail strategies and policies for their areas which are more detailed than in more rural areas. In addition they also state “*it will be necessary for some counties to co-operate with one another in preparing retail strategies*” and County Limerick, County Clare and Limerick City are specified as local authorities that should “*jointly prepare comprehensive retail strategies and policies*” addressing the following matters:
- i Confirmation of the retail hierarchy, the role of centres and the size of the main town centres;*
  - ii Definition in the development plan of the boundaries of the core shopping area of town centres;*
  - iii A broad assessment of the requirement for additional retail floorspace;*
  - iv Strategic guidance on the location and scale of retail development;*
  - v Preparation of policies and action initiatives to encourage the improvement of town centres; and*

vi *Identification of criteria for the assessment of retail developments.*

- 1.5 The RPG state that in addressing items (iii) and (iv) strategies should provide an assessment of requirements for additional development reflecting evidence of market interest and projected changes in local population and consumer spending. The intention “*is to provide broad guidance as to the additional quantum of convenience and comparison floorspace provision. They should not be treated in an overly prescriptive manner and should not seek to inhibit competition*”.
- 1.6 In addition, there are a number of influences and considerations that further set the context when preparing retail strategies. These are:
- National Plans, Strategies and Guidelines
  - Statutory Development Plans
  - Shopping Patterns, Consumer and Market Demand
  - Retail Trends
  - Consultation Responses.

**THE MID WEST RESPONSE**

- 1.7 To enable the retail needs, opportunities and issues of the whole of the Mid West Region to be addressed, in addition to Limerick County, City and County Clare, North Tipperary County Council’s jurisdiction was included in the study area for the Retail Strategy.
- 1.8 In addition to addressing the requirements of the RPG, the four councils in the Mid West Region set out a range of specific factors that the Retail Strategy should incorporate. These reflected the need to ensure that the Strategy would address the unique characteristics of the Region, its counties and its settlements. These factors are as follows:
- i To take account of Shannon and Ennis as existing shopping centres and a recommendation as to the allocation of retail floorspace to these towns;\*
  - ii The Strategy shall (in the context of the decisions by both Limerick City and Limerick County Councils to grant permissions exceeding previous guidelines) recommend a viable policy to be pursued henceforth by all four local authorities which will ensure that the RPG as they apply to Limerick City can be implemented in full;

- iii The Strategy will examine current household shopping behaviour and should advise on how such behaviour would be likely to change to in the context of modified retailing opportunities;
- iv The Strategy should estimate current and prospective retail spending within the Study Area and should estimate how such spending is likely to be distributed over the existing and potential centres including the City Centre;
- v The Strategy should take cognisance of trends generally in the retail sector and should advise as to how such trends are likely to impact on the general development of retailing in the Study Area;
- vi The Strategy should advise on potential viability and suitability of certain selected sites for retailing and should take account of the City's goal "*to promote the commercial and trading development of the City Centre*" as expressed in the Limerick City Development Plan; and
- vii The Strategy should take into account the need to promote sustainable development as referred to in the document "Sustainable Development – A Strategy for Ireland".

**Note:** \* the emphasis on Shannon and Ennis reflects that the brief was originally set to cover Limerick County and City and Clare and prior to it extending to include North Tipperary. It is important to highlight that the main towns in all of the counties were given equal attention in the preparation of the Mid West Regional Retail Strategy and its component County/City Retail Strategies.

## STUDY APPROACH

1.9 The framework for the preparation of the Retail Strategy was structured as follows:

- **Stage 1:** Study Commissioning/Inception
- **Stage 2:** Baseline Review & Analysis
- **Stage 3:** Capacity Assessment
- **Stage 4:** Strategy Formulation/Final Report.

### Stage 1: Study Commissioning/Inception

1.10 Given the importance of the Strategy, a period of study inception was incorporated in our approach. This was to enable the refinements deemed necessary by the councils to be made in advance of work commencing. The detail of the approach agreed is set out in the paragraphs that follow.

## Stage 2: Baseline Review and Analysis

1.11 The baseline review and analysis comprised consultations, site visits, data collection and assessment and desk based research. The components of the work are summarised below:

- i **Planning Policy and Context:** which included national and local policy, extant planning permissions, town centre/other initiatives and the existing national/County/City retail hierarchies;
- ii **Population and Economic Context:** population figures for the period of the Strategy were derived from each council's housing strategy and the economic context from a number of reputable Government data sources and the County/City Development Boards' strategies. In the course of the study, the preliminary results of the 2002 Census of Population and the National Spatial Strategy were published and these have been taken account of in the preparation of the Strategy;
- iii **Health Checks:** were undertaken of Limerick City and Environs and the main towns in each county. As all of the towns did not have the full range of the quantitative data set out in the RPG checklist, we used our modified proforma to produce quantitative and qualitative health checks. The towns where health checks were undertaken by the study team were agreed with the Client Group. In addition, Clare County Council undertook additional health checks of selected centres in the County. These centres are highlighted with an \* symbol. The full list of centres were:

### Limerick County

- Abbeyfeale
- Adare
- Kilmallock
- Newcastlewest
- Rathkeale

### North Tipperary

- Nenagh
- Roscrea
- Templemore
- Thurles

### Clare

- Ballyvaghan\*
- Corofin\*

- Ennis
  - Ennistymon
  - Kilkee
  - Killaloe
  - Kilrush
  - Lahinch
  - Lisdoonvarna
  - Miltown Malbay\*
  - Newmarket on Fergus
  - Scarrif
  - Shannon
  - Sixmilebridge
  - Tulla\*.
- iv **Property Market Appraisals/Retail Trends:** an assessment of retail potential across the Region and at individual centre level was undertaken. This utilised local, national and international market intelligence plus our work to date on the retail trends that are set to influence the shape of retailing around the country and in the Mid West;
- v **Consultations:** consultations prior to the production of the Draft Strategy were:
- Call for comments and submissions in the local press. Fourteen written submissions were received.
  - Briefing sessions with each council on the context of the Strategy, the components of the work and the work programme.
  - Meetings with the Limerick City Co-ordination Office and Chambers of Commerce from the main towns in the Region.
  - A Consultation Seminar with Members of the four councils and representatives from the Town Councils which enabled the key findings from the baseline review and capacity assessments to be presented and discussed. The seminar included workshops with Members in the four local authority areas and the particular issues and opportunities that were emerging.
- vi **Floorspace Survey:** the net retail floorspace was recorded in selected centres for all retail properties under the categories of convenience, comparison, bulky goods and vacant retail space. It was agreed with the Client Group that the survey would be for Limerick City Centre and surrounding shopping centres and towns over 2,000 people at the 1996 Census within the Mid West Region. It was acknowledged that this did not cover the numerous smaller centres within the Region which form an important part of local shopping patterns but

was the scope of work that resources permitted. This approach is consistent with that adopted in other retail strategies around the country. It provides a quantitative and informed basis for the broad assessment of the requirement for additional retail floorspace, that is required by the RPG, for Mid West and its component local authority areas. These centres were:

- Limerick City Council Area including Roxboro, Arthurs Quay and the Parkway Shopping Centres
- Limerick City Environs(the County Council Area) including the Castletroy, Crescent and Jetland Shopping Centres and the Riverside Retail Park
- Rest of County Limerick – Newcastlewest
- Clare – Ennis, Kilrush and Shannon
- North Tipperary – Nenagh, Roscrea, Templemore and Thurles.

vii **Household and Shopper Surveys:** household surveys enable the shopping patterns of residents of the Mid West to be determined. This includes those within each respective local authority area, the flows to centres outside of each area but within the Region and those to outside of the Region. Shopper surveys add to the information on residents' shopping patterns but also provide that on inflows of spend by both residents in neighbouring counties and tourists/visitors. Both surveys provide key information on expenditure retention and leakage and hence provide vital information that assists estimation of the retail spend potential of the Region and its component local authorities. The details of the surveys are as follows:

- **Household Survey:** some **969** households/residents across the Region were interviewed by telephone surveys.
- **Shopper Surveys:** these were undertaken in Limerick City Centre, Parkway, The Crescent and Jetland Shopping Centres, Newcastlewest, Ennis, Kilrush, Shannon, Thurles, Nenagh, Templemore and Roscrea. Surveys were by face-to-face interviews and a total of **1,130** were completed.

### Stage 3: Capacity Assessment

1.12 The capacity assessment identifies the potential expenditure available for additional retail floorspace in the Mid West Region and its local authority areas over the Strategy period. This period is in the first instance to 2006 in order to be broadly consistent with county development plans and then to 2011.

- 1.13 The findings from Stage 2 and Stage 3 of the study were brought together in a **Consultation Report** and **Capacity Assessment Report** respectively, which together are provided as the **Technical Appendix** to the Mid West Retail Strategy.

#### **Stage 4: Strategy Development/Formulation**

- 1.14 The next stage of the work was strategy formulation and the preparation of the **Mid West Retail Strategy** and individual **Retail Strategies** for each council's jurisdiction.

#### **THE MID WEST RETAIL STRATEGY**

- 1.15 The Mid West Retail Strategy comprises the following documents, the contents of which are summarised below:

- Mid West Retail Strategy
- County and City Retail Strategies
- Technical Appendix.

- 1.16 The **Mid West Retail Strategy** sets out the overall strategic context for retail planning and development for the Region. In particular, it defines the retail hierarchy for the Region as well as providing the broad principles by which additional retail development should be distributed across the Region. Each **County/City Retail Strategy** takes the principles of the Regional Retail Strategy and applies these at the County and City level as appropriate. The County/City Retail Strategies address retail potential at a local authority and site specific level and detail the aims, strategic and specific policies that should be incorporated in the respective development plans. The **Technical Appendix** is a supporting document to the Retail Strategies and provides the baseline reviews and assessments that underpin the different strategies.

#### **STRUCTURE OF REPORT**

- 1.17 The remainder of the report is set out as follows:
- **Section 2:** presents the key baseline facts and analysis for the Regional Retail Strategy
  - **Section 3:** provides the capacity assessment of the potential for further retail floorspace in the Region

- **Section 4:** reviews and assesses the retail hierarchy and the role that key centres do and should play
- **Section 5:** presents the aims, strategic policy framework and principles of the Mid West Retail Strategy.

## **2. KEY BASELINE FACTS AND ANALYSIS**

2.1 As has been highlighted, the detail of the baseline information that is specific to the Strategy is contained in the separate but integral supporting Technical Appendix to this report. In this section, we set out and examine the key baseline information in respect of:

- i Population levels and forecasts for the Region;
- ii Income levels;
- iii The extent and distribution of retail floorspace in the Region; and
- iv Shopping patterns and expenditure flows.

### **POPULATION LEVELS AND FORECASTS**

2.2 The baseline review and assessment for the Strategy was completed in May 2002. This effectively was the cut off date for baseline information and analysis. However, in the later stages of the study the preliminary results from the April 2002 Census of Population and the National Spatial Strategy(NSS) were published, both of which have important relevance to the population data and forecasts that underpin the Regional and County/City Retail Strategies. The former are not adopted results and do not provide the full and detailed results from the Census. The full results will not be available until Spring/Summer 2003. They however do provide accurate information at the County/City area level. As a consequence, it was agreed with the Client Group that:

- Following the publication of the full results of the Census and in depth consideration of the NSS, there will have to be comprehensive reviews of the population data underpinning development plans and other strategies of the respective councils across the Region
- The baseline prepared for the Regional and County/City Retail Strategies should prevail but that the implications of the 2002 Census and NSS for the Mid West and its component Strategies should be duly taken account of.

2.3 It should be noted that, in respect of the former, this was the approach adopted in Greater Dublin Area(GDA) Retail Planning Strategy(November 2001). The GDA strategy's population and forecasts came from the GDA Strategic Planning Guidelines(SPG) and as these would require to be reviewed in the light of the Census results and the implications of the NSS then a review of the GDA strategy would have to follow. As the Mid West moves towards preparation of its SPG then to avoid a

series of data analysis over this period and the issues that are likely to stem from this, we would recommend that the Mid West Region adopts a similar approach. This stated, it is acknowledged that the preliminary results from the Census provide valuable insights into how the counties/the City and their different centres have performed in terms of population trends since 1996. As such, where it has been possible we have used the results to inform our analysis and the development of the Regional and County/City Retail Strategies.

- 2.4 Table 2.1 identifies that the population of the Mid West Region at the 1996 Census of Population was 317,069, which represented around 9% of the State's population. Limerick City and County together account for over half of this (52%), followed by Counties Clare and North Tipperary with 30% and 18% respectively. The table illustrates that Limerick City, with a population close to 80,000 in 1996, is the main centre of population in the Region and the third largest city in the country. It should be highlighted that population size is only one factor in the determination of the retail importance of a centre and this has been duly taken account of in the assessment of the County Retail Hierarchy. The table serves to illustrate the magnitude of differences in population size across the spectrum of the Mid West's centres to provide a context for other components of the analysis and assessment.

<b>Table 2.1</b>				
<b>Population of the Counties and Main Centres in the Mid West Region, 1991-96</b>				
<b>(Towns with Population &gt;1,000)</b>				
<b>Location</b>	<b>1991</b>	<b>1996</b>	<b>Absolute Change</b>	<b>Percentage Change</b>
<b>Clare</b>				
County	90,918	94,006	3,008	3.4
Ennis & Environs	16,058	17,726	1,668	10.4
Shannon & Environs	7,920	7,939	19	0.2
Kilrush	2,740	2,594	-146	-5.3
Newmarket-on-Fergus	1,583	1,542	-41	-2.6
<b>Limerick</b>				
County and City	161,956	165,042	3,086	1.9
Limerick City & Suburbs*	75,436	79,137	3,701	4.9
Newcastle & Environs	3,612	3,618	6	0.2
Rathkeale	1,803	1,546	-257	-14.3
<b>North Tipperary</b>				
County	57,854	58,021	167	0.3
Thurles & Environs	6,955	6,939	-16	-0.2
Nenagh & Environs	5,825	5,913	88	1.5
Roscrea	4,231	4,170	-61	-1.4
Templemore & Environs	2,325	2,244	-81	-3.5
<b>Mid West Region</b>	<b>310,728</b>	<b>317,069</b>	<b>6,341</b>	<b>2.0</b>
<b>Note:</b> * Includes Suburbs in Limerick County and Clare				
<b>Source:</b> 1996 Census of Population, CSO				

- 2.5 Since 1996, there has been a significant growth in the population. This is illustrated when the preliminary results of the 2002 Census are set against the adopted results for 1996 at a county level. Comparisons at the centre level are more difficult at this stage as different DED boundaries have been used. They are thus not incorporated in the table but are taken into account in the assessment of individual centres in the County Retail Strategies.

<b>Table 2.2</b>				
<b>Population of the Counties in the Mid West Region, 1996-2002</b>				
<b>Location</b>	<b>1996</b>	<b>2002</b>	<b>Absolute Change</b>	<b>Percentage Change</b>
Clare	94,006	103,333	9,327	9.9
Limerick	165,042	175,529	10,487	6.4
North Tipperary	58,021	61,068	3,047	5.3
<b>Mid West Region</b>	<b>317,069</b>	<b>339,930</b>	<b>22,861</b>	<b>7.2</b>
<b>Source:</b> Preliminary results of 2002 Census of Population, CSO				

- 2.6 Comparison of Tables 2.1 and 2.2 illustrates that there was a considerable increase in population between 1996 – 2002 in comparison to 1991 – 1996 across all of the counties in the Region. However, the growth is less than what was assessed by using the county housing strategies and the NSS. We address this in the paragraphs that follow.
- 2.7 In order to be consistent with population data in current development plans, and in line with advice from the DoELG, the population forecasts in each of the County/City’s housing strategies are used up to 2006 and their growth rates are then used to interpolate the 2011 forecasts. As the forecasts are compiled from the individual housing strategies, they are found to contain different growth assumptions. As a consequence, they are not built up on a regional basis and hence differ considerably from those of the CSO Regional Projections. The latter are based on long term trends for the Region and do not take intra-regional migration flows into account or do make any assumptions based on policy initiatives.
- 2.8 The forecasts in Table 2.3 correspond to those under the most optimistic scenario of the NSS, where a significant amount of economic activity is diverted from the east, particularly Mid East and Dublin Regions, to other parts of the country.

<b>Table 2.3</b>				
<b>Population Forecasts for the Mid West Region</b>				
<b>Location</b>	<b>1996</b>	<b>2001</b>	<b>2006</b>	<b>2011</b>
Clare	94,004	108,682	120,622	133,874
Limerick City	52,039	52,548	56,560	60,878
Limerick County	113,003	119,122	124,472	130,062
North Tipperary	58,021	67,164	74,601	82,861
<b>Mid West Region</b>	<b>317,067</b>	<b>347,516</b>	<b>376,255</b>	<b>407,371</b>
<b>Source:</b> CSO 1996 Census of Population, County Housing Strategies and own estimates				

- 2.9 These forecasts show how the Region should have experienced growth of about 10% between 1996 and 2001. As Table 2.2 illustrates, this was not achieved with the Mid West only achieving 7.2% of an increase by 2002. The Clare and North Tipperary housing strategies overestimated the population figures to 2001 with the variations being 15.6% to 9.9% (2002) and 15.7% to 5.3% (2002) respectively. In contrast, the County Limerick 2002 figures were below those forecast in the County and City's housing strategies with 4% against the actual 2002 increase of 6.4%. The greatest growth was in the Limerick Metropolitan Area as the suburbs of the City grew significantly over this period. From the preliminary Census results, it appears that within Limerick County there has been a redistribution of population in recent years. Specifically, there has been a trend of continued movement of population in the Region towards a 10 mile radius of Limerick City, putting pressure on the areas adjoining the City, its Environs and smaller settlements such as Adare, Newmarket on Fergus, Sixmilebridge, Castleconnell and Newport. Ennis, the second largest town in the Region, has experienced the highest population growth. The results indicate that Limerick City, Ennis and the South Clare Economic Corridor have especially benefited from good employment growth due to increased inward investment especially in the ICT sector (Ennis was designated an Information New Age Town in 1997). The designation of the Limerick and Shannon as a 'gateway' and Ennis as a 'hub' in the NSS should further enhance this trend. In North Tipperary, growth was higher in Nenagh than the Mid West and County averages with both Roscrea and Thurles experiencing growth below both of these averages. The largest population increase in the County was at Ballina which experienced an increase of some 62.1%. It also has to be highlighted that there are some of the rural parts of all three counties that have experienced minimal growth or falls in their population. This largely continues the trends that prevailed between 1991 and 1996 in these areas.

### **INCOME LEVELS**

- 2.10 Disposable per capita income in the Mid West Region is just below the national average and is the second highest level across all the regions in the country. During the period 1995 to 1999, the Mid West saw a small improvement in its position relative to the State. Disposable per capita income rose from 97.5% of the national average in 1995 to 99.8% in 1998, before falling back slightly to 98.7% in 1999.
- 2.11 However, large disparities exist at county level across the Region. While disposable per capita income in County Limerick (including the City) is the second highest in the country at 103.8%, Clare and North Tipperary are below the national average at 93.4% and 92.7% respectively. Both Counties Clare and Limerick have seen an improvement in their position relative to the State, although disposable per capita income in North Tipperary has fallen from 96.5% of the national average in 1995 to just under 93% in 1999.

## RETAIL FLOORSPACE

2.12 The floorspace survey established the quantity of existing retail floorspace in the main centres and towns (above 2,000 population at 1996) and categorised it into either convenience, comparison, retail warehousing (bulky goods) or vacant space. The information informs the relative position of the larger centres and towns in the retail hierarchy as well as providing a picture of the distribution and breakdown by type of retail floorspace in the Region.

2.13 In total, some **266,380m<sup>2</sup>**(net) of retail floorspace was surveyed across the Region. Table 2.4 provides the composition of retail floorspace by location. It acknowledges that the survey was focused on the main towns only which was dictated by the resources available and agreed with the Client Group. Due to resource constraints, this has been the approach that has been adopted in the majority of other retail strategies across the country. As has been highlighted in Section 1, there are many smaller centres that play very important roles in their respective catchments. This is recognised in the Regional and County/City Retail Strategies. The table is provided highlight the generally higher order centres as those will be where the quantum of additional retail floorspace will be located. As will be apparent, the policies and initiatives set down by the Regional and County/City hierarchies provide the framework for these being enhanced. This baseline fact noted, the breakdown by type and percentage of the total is as follows:

- 72,684m<sup>2</sup> of convenience floorspace(27%)
- 146,270m<sup>2</sup> of comparison floorspace(55%)
- 31,554m<sup>2</sup> of retail warehousing(12%)
- 15,872m<sup>2</sup> of vacant floorspace(6%).

<b>Table 2.4</b>					
<b>Composition of Net Retail Floorspace (m<sup>2</sup>) in the Mid West</b>					
<b>Town</b>	<b>Total Area</b>	<b>Convenience</b>	<b>Comparison</b>	<b>Retail Warehousing</b>	<b>Vacant</b>
Ennis	35,816	7,326	18,198	8,311	1,981
Kilrush	7,174	1,993	4,448	338	395
Shannon	4,945	3,367	1,158	-	419
<b>Total Three Clare Towns</b>	<b>47,934</b>	<b>12,687</b>	<b>23,804</b>	<b>8,649</b>	<b>2,795</b>
Nenagh	17,739	8,240	9,153	-	346
Roscrea	9,796	4,156	5,514	-	126
Thurles	23,714	7,322	13,475	2,059	857
Templemore	5,901	1,724	1,882	2,187	108
<b>Total Four North Tipperary Towns</b>	<b>57,149</b>	<b>21,443</b>	<b>30,024</b>	<b>4,246</b>	<b>1,437</b>

<b>Table 2.4 (contd)</b>					
<b>Composition of Net Retail Floorspace (m<sup>2</sup>) in the Mid West</b>					
<b>Town</b>	<b>Total Area</b>	<b>Convenience</b>	<b>Comparison</b>	<b>Retail Warehousing</b>	<b>Vacant</b>
Limerick City	91,258	15,446	64,342	7,432	4,038
Arthurs Quay Shopping Centre	3,475	2,489	890	-	96
Parkway Shopping Centre	7,695	3,000	4,450	-	244
Roxboro Shopping Centre	5,887	3,021	437	-	2,428
<b>Limerick City Council Area</b>	<b>108,314</b>	<b>23,856</b>	<b>70,120</b>	<b>7,432</b>	<b>6,807</b>
Limerick Environs – Other	12,644	4,363	2,933	5,349	
Castletroy Court SC	6,156	3,329	1,032	-	1,795
Riverside Retail Park	4,104	-	-	3,807	297
Crescent SC	18,255	3,396	13,106	-	1,753
Total Limerick Environs	41,160	11,089	17,071	9,156	3,846
Newcastlewest	11,822	3,513	5,251	2,072	987
<b>Limerick County</b>	<b>52,982</b>	<b>14,600</b>	<b>22,322</b>	<b>11,228</b>	<b>4,832</b>
<b>Limerick Metropolitan Area*</b>	<b>149,474</b>	<b>34,945</b>	<b>87,191</b>	<b>16,588</b>	<b>10,653</b>
County and City Limerick	161,296	38,456	92,442	18,660	11,639
<b>Mid West Region</b>	<b>266,380</b>	<b>72,684</b>	<b>146,270</b>	<b>31,554</b>	<b>15,872</b>
<b>Note:</b> * Limerick Metropolitan Area comprises Limerick City and Its Environs					
<b>Source:</b> DTZ Sherry FitzGerald Floorspace Survey December 2001					

### Limerick Metropolitan Area

- 2.14 The prominence of the Limerick Metropolitan Area (the City and Environs) is evident from Table 2.4. The area has some 149,474m<sup>2</sup> of retail floorspace which is some 56% of the Region's total. This predominance would be expected given that it is the second largest regional city/metropolitan area in the country. The following facts emphasise the retail importance of the Metropolitan Area in the Region. It has:
- i 48%(34,945m<sup>2</sup>)of convenience;
  - ii 60%(87,191m<sup>2</sup>)of total comparison floorspace; and
  - iii 52.6%(16,588m<sup>2</sup>)of the retail warehouse/bulky goods floorspace.
- 2.15 Within the Metropolitan Area, the breakdown between the City Council Area and the City Environs (part of the County Council Area) reveals the following and indicates the spatial pattern that prevails:

- The City Council Area has clearly the majority of the floorspace with 72.5%(108,314m<sup>2</sup>) of the total and 68%(23,856m<sup>2</sup>) of convenience, over 80%(70,120m<sup>2</sup>) comparison and nearly 45% of the bulky goods/retail warehousing totals respectively
- Review of the balance between the City Centre and the remainder of the Metropolitan Area indicates that the City Centre has over 63% of the total, 51.3% convenience and nearly 75% and 45% of comparison and retail warehousing/bulky goods respectively.

2.16 The figures illustrate that the City Centre dominates the distribution of retail floorspace within the Metropolitan Area even with the development of out of centre shopping centres around the City and its Environs. Closer inspection of the City Centre figures indicate that majority of the floorspace within the City Council Area is comparison at over 60% with convenience and retail warehousing/bulky goods accounting for 16.5% and nearly 7% respectively. Vacancies in the City Centre are low at 4.3% which indicates its strength and vitality. The figures confirm the City Centre as primarily a comparison centre as would be expected with one of the country's major cities.

### Remainder of the Mid West

2.17 **County Limerick:** the remainder of the County's floorspace is distributed in a number of small centres around the County. Based on the population threshold for the floorspace surveys using the 1996 Census of Population figures, only Newcastlewest came above this. It has 22.3% of the County's total floorspace which reflects its importance as a retail centre in the County, given that the remaining centres are purpose built shopping centres in the Limerick City Environs. Only the Crescent Shopping Centre at Dooradoyle had a larger quantum of floorspace. In terms of its position in the Region, Table 2.4 shows that Newcastlewest had less floorspace than Ennis, Nenagh and Thurles but more than Kilrush, Shannon, Roscrea and Templemore. It is therefore a key retail centre in the Region and, as the household and shopper surveys reveal, this is supported by the role it plays in serving a wide rural hinterland.

2.18 **Clare:** based on the floorspace in the three key centres above the population threshold(Ennis, Kilrush and Shannon), the County has just over 18%(47,934m<sup>2</sup>) of the Region's floorspace and 74.7% of this is within Ennis. Some 26.4% of the County's total is convenience, 49.6% comparison and 18% retail warehousing/bulky goods. Vacancies in the three towns average just under 6% and is thus not of a level to cause concern. The highest level is found in Shannon where it stands at nearly 8.4%. Again, this is not considered to be significant. Ennis is the second largest retail centre in the Region behind Limerick City, with the next centre (Thurles) having two thirds of the total floorspace of Ennis. Nearly 51% of Ennis' floorspace is comparison and this rises to 74% when retail warehousing/bulky goods floorspace is

added. The town has in fact 26.3% of the total retail warehousing/bulky goods floorspace in the Mid West which is significantly above that for the whole of North Tipperary. The figures confirm the retail importance and attraction of Ennis in the Region. Kilrush and Shannon are much smaller centres. The former is predominantly a comparison centre and the latter convenience. This reflects the different roles and geographical locations of both centres in the County and Region. Shannon, in view of its proximity and accessibility to Limerick City and its Environs and Ennis, and the quality of offer in each, has a small quantum of floorspace when set against its population size and that of other comparable sized or smaller towns in the Region.

- 2.19 **North Tipperary:** the four towns in North Tipperary that are above the population threshold for the floorspace survey (Nenagh, Roscrea, Templemore and Thurles) account for some 22% (57,149m<sup>2</sup>) of the Region's floorspace. The County has a greater amount of both convenience and comparison floorspace than Clare but a smaller amount of retail warehousing. This reflects the larger centres that prevail, the geographical spread of the main towns and a relative decrease in the dominance of Limerick City and its Environs, as evidenced by the balance of the floorspace composition across the County. Just over 37.5% (21,443m<sup>2</sup>) of the County's floorspace is convenience and 52.5% is comparison. Retail warehousing/bulky goods floorspace is 7.4% (4,246m<sup>2</sup>) of the total. The largest centre is Thurles which has nearly 41.5% (23,714m<sup>2</sup>) of the County's floorspace, followed by Nenagh with 31% (17,739m<sup>2</sup>). Roscrea and Templemore account for 17.1% (9,796m<sup>2</sup>) and 10.3% (5,901m<sup>2</sup>) respectively of the total. Nearly 57% (13,475m<sup>2</sup>) of Thurles floorspace is comparison, 30.8% (7,322m<sup>2</sup>) convenience and 8.7% (2,059m<sup>2</sup>) retail warehousing. Whilst comparison floorspace is a greater proportion of the town's total, it is less than Ennis which indicates the different retail offers and attractions of the two centres. This differs from Nenagh where there is a more even balance of 46.4% (8,240m<sup>2</sup>) and 51.5% (9,153m<sup>2</sup>) of convenience and comparison floorspace respectively. Currently, Nenagh has no retail warehousing floorspace which perhaps reflects its closer proximity to the Limerick Metropolitan Area.

### **New Floorspace**

- 2.20 The floorspace surveys were undertaken in December 2001. They therefore do not include new retail developments which are trading, now under construction and/or have received planning consent since that date. These emerging retail developments are taken into account in the assessment of additional retail floorspace potential in Section 3. In total, there is currently over **19,442m<sup>2</sup>** (gross) of retail floorspace from larger developments with planning consent that should be trading in the next few years in the Mid West. This does not include the pending schemes around the Region which are the subject of discussions with the different local planning authorities or have been identified in submissions in respect of the Retail Strategy. At this stage, the pending schemes can only be taken to reflect market interest as they may or may not materialise.

## SHOPPING PATTERNS AND EXPENDITURE FLOWS

- 2.21 Household and shopper surveys provide baseline information on shopping patterns and expenditure flows. As highlighted in Section 1, some **969** randomly selected household telephone interviews were taken across the Region and **1,130** face to face on street interviews in the twelve main towns and shopping centres in the Mid West that were agreed with the Client Group. It is important to note that these surveys, apart from the Census, are amongst the most extensive that have been conducted in the Region. The most relevant points emerging from these surveys relate to:
- i Where people are coming from to shop and where they are shopping;
  - ii What are the expenditure inflows and outflows for each local authority area; and
  - iii How they get there.
- 2.22 This information indicates the relative importance of different centres as well as providing estimates of the **market share**(what proportion is being retained in the Region and each of the local authority areas) and **trade draw**(what proportion of expenditure is coming into the Region and each of the component local authority areas). Detailed analysis of the household and shopper surveys is provided in the Technical Appendix and that more specific to the different local authority areas is summarised in the respective County/City Retail Strategies. We summarise the key findings under the following headings:
- Catchment areas
  - Expenditure flows
  - Mode of travel.

### Catchment Areas

- 2.23 The survey results indicate that the Mid West Region is a self contained catchment area with small flows either in or out. This implies that firstly, residents of the Region tend to do their shopping within the Region and secondly, there was only a small number of visitors/tourists coming into the Region at the time of the surveys. Table 2.5 summarises the key findings from the **household survey**.

<b>Table 2.5</b>							
<b>Origin and Shopping Destinations of All Respondents in the Mid West Region</b>							
Origin	Shopping Destination %						Total
	Limerick County	Limerick City	North Tipperary	Clare	Outside Mid West	Others*	
<b>Limerick County Respondents</b>							
Main	58	29	1	0	0	12	100
Top-up	78	13	1	2	0	7	100
Bulky	29	61	1	1	2	5	100
Clothing / Footwear	28	72	0	0	3	4	107
<b>Limerick City Respondents</b>							
Main	38	54	1	2	0	6	100
Top-up	43	52	0	1	0	5	101
Bulky	9	80	0	1	2	10	102
Clothing / Footwear	14	89	0	1	0	4	108
<b>North Tipperary Respondents</b>							
Main	2	5	85	1	0	6	99
Top-up	1	0	88	2	1	8	101
Bulky	1	10	76	1	7	7	101
Clothing / Footwear	1	21	64	0	12	6	105
<b>Clare Respondents</b>							
Main	6	11	0	76	0	3	97
Top-up	4	6	0	85	0	6	102
Bulky	2	25	0	66	3	5	101
Clothing / Footwear	4	35	0	67	6	3	115
<b>Mid West Region Respondents</b>							
Main	24	20	15	31	0	7	98
Top-up	29	13	19	36	0	4	101
Bulky	10	40	15	27	3	6	101
Clothing / Footwear	11	50	13	28	5	3	110
<b>Notes:</b> *Others: includes 'Don't do that type of shopping/Don't know/Other locations'							
**Totals do not add to 100% due to multiple responses for some retail destinations, this was especially the case for clothing and footwear							
<b>Source:</b> Lansdowne Market Research Household Survey January 2002							

2.24 The table illustrates that a limited number of Mid West residents are going out of the Region for non food items (bulky, goods, clothing and footwear) and none for food items. The greatest proportion of outflows from the Region was from North Tipperary which is closer to a number of other competing centres in neighbouring counties. The intra-regional shopping patterns are more complex. However, Limerick City is clearly dominant in the Region for non food items with 40% and 50% respectively of respondents across the Region going there for their clothing and footwear and bulky goods shopping. We assume that on the whole Limerick City is the Limerick Metropolitan Area as respondents will not have distinguished between the City Centre and its Environs. In addition, we would highlight the following:

- i North Tipperary retains most of its residents convenience shopping and bulky goods shopping whilst there is leakage of comparison shopping (mainly for clothing and footwear) to Limerick City and outside of the Region. The County retains a higher proportion of its resident's convenience and bulky

goods shopping than for County Clare but the latter performs better in respect of clothing and footwear shopping;

- ii There is leakage out of Clare for both convenience and comparison (both clothing and footwear and bulky goods) mainly to Limerick City but also to Limerick County. Whilst it is much higher for comparison, it is also higher than should be anticipated for convenience shopping;
- iii Limerick City retains a much higher proportion of comparison (both clothing and footwear and bulky goods) than convenience shopping which is leaking to Limerick County. This will be predominantly the shopping centres in the City's Environs;
- iv County Limerick is managing to retain more convenience shopping than comparison (both clothing and footwear and bulky goods) which is going to Limerick City. This reflects the attraction of the City Centre and the City Council Area in terms of the range and quality of its offer; and
- v There is minimal interaction between Clare and North Tipperary. Given the findings of the floorspace surveys then this could be anticipated.

2.25 As agreed with the Client Group, the **shopper survey** was limited to the main centres in the Region and as such smaller centres in North Clare were not covered. This noted, the flows of expenditure from the area would however have been identified from the household survey. However to try to address this further, we undertook a review of the Galway County and City retail strategy to ascertain what information from the shopper survey in this strategy could assist in further informing patterns within Clare and the Region. The review indicated that the Galway shopper survey questionnaires did not ask specifically where people came from if they were from outside of the county. The results indicate that some 14% of Gort shoppers came from outside of the county but 25% of those interviewed also shopped outside of County Galway. A proportion of the former will come from Clare and of the latter a proportion will come into the County. There is however not the detail in the results in the Galway strategy to enable further information on shopping inflows and outflows between it and Clare/the remainder of the Mid West to be determined. They are however acknowledged and responded to in the preparation of the Regional and County Retail Strategies.

2.26 Consistent with the household survey, the shopper survey confirms the self contained nature of the catchment area for the Mid West. As indicated in Table 2.5, only 2.5% of people surveyed were from outside of the Region. Of particular note is the survey found no international visitors. Roscrea was the only town where a large proportion (18%) of those surveyed were from outside of the Region. This is not surprising given its location in the north of the Region and proximity/accessibility to other centres. It is however important to examine these findings:

- The timing of the survey in January and February would not capture the true picture of the Region’s tourism attraction and potential. We know that these numbers will increase in the summer months as the Region is popular with both international and domestic tourists and account has to be taken of this in the capacity assessment. In 2000, there were almost 2 million visitors, of which 1.2 million were from overseas(Bord Failte Fact Sheets 2000). This is 12% of total overseas visitors to Ireland and is the fourth largest share out of the seven Bord Failte Regions.
- Shannon Airport is an international gateway to the country and Region with 78% of all overseas visitors to the Region coming through the Airport.
- The above accepted, comparable surveys commissioned as part of other retail strategies around the country were undertaken in the autumn and winter. These surveys indicated higher proportions of visitors than those of the Region.

We are however able to revise the figures across the County based on the turnovers that will be required to support the levels and types of retail floorspace.

2.27 Table 2.6 provides an indication of each town and centre’s catchment area. Towns such as Roscrea, Shannon and Templemore are found to have more limited catchments whilst Ennis, Kilrush, Newcastlewest and Thurles serve wider rural hinterlands and play a more important role in their respective County’s shopping patterns. Limerick City Centre, the Parkway, Jetland and Newcastlewest have a wider regional role although the location of the Parkway (on route to North Tipperary) and Jetland (on route to Clare) will have an influence on this.

**Table 2.6**  
**Catchment Area for Shopping in the Main Centres and Towns (% of respondents in each town/centre)**

Location	Nenagh	Thurles	Templemore	Roscrea	Newcastlewest	Crescent SC	Jetland SC	Limerick City Centre	Parkway SC	Ennis	Shannon	Kilrush	Mid West
Live in Town	56	50	77	68	40	50	44	52	56	40	72	50	<b>51</b>
Live Outside of the Town but in the County	36	48	23	14	48	36	30	25	29	57	20	47	<b>35</b>
Rest of the Mid West	8	0	0	0	12	5	21	19	9	2	8	0	<b>10</b>
Rest of Country	0	2	0	18	0	6	3	3	0	1	0	3	<b>2.5</b>
Overseas	0	0	0	0	0	0	0	0	0	0	0	0	<b>0</b>
Not Stated	0	0	0	0	0	4	2	1	5	0	0	0	<b>2</b>
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

**Source:** Lansdowne Market Research Shopper Surveys January and February 2002

## Expenditure Flows

- 2.28 Comparative analysis of the findings from the floorspace and customer (household and shopper) surveys with those from our work on other strategies around the country provides a valuable insight to the relative strengths and weaknesses of the Region, its component local authority areas and towns/centres. At a strategic level, Table 2.7 illustrates the expenditure flows in and out of each of the counties in the Mid West and compares them with a number of other counties where we have prepared retail strategies. A more detailed comparative analysis at the County/City level is provided in each of the respective County/City Retail Strategies.
- 2.29 From the table, **County Clare** is seen to have an inflow of convenience and comparison spend of about the order of Kilkenny. In respect of comparison expenditure – this is likely to be much higher during the summer period. The County’s outflow (and we know from Table 2.6 above that is mainly to Limerick City and County) for convenience expenditure is significantly higher than the other counties including those counties adjacent to the Dublin Metropolitan Area such as Meath and Wicklow. Its comparison expenditure outflow is also high and is comparable to Meath and Wicklow. This reflects the dominance of Limerick City and its Environs on the County’s shopping patterns. Whilst this would be expected for comparison expenditure, the convenience outflows raise the issue of the quality of its convenience offer. In contrast, **North Tipperary** has a small net inflow on the convenience side which would be expected as people tend to do convenience shopping locally. The County has an 11% net outflow of comparison expenditure. Limerick City and County have net inflows of both convenience and comparison but well below that of Dublin City Centre. Given that Dublin City Centre is the only Tier 1 centre in the RPG hierarchy, this would be expected. However, the figures would suggest that there is scope for improvement in Limerick’s comparison offer.

<b>Table 2.7</b>				
<b>Comparison of Expenditure Flows</b>				
<b>County</b>	<b>Inflow (%)</b>		<b>Outflow (%)</b>	
	<b>Convenience</b>	<b>Comparison</b>	<b>Convenience</b>	<b>Comparison</b>
Clare	10.0	25.0	21.3	41.6
Limerick (City and County)	30.0	45.0	6.3	6.8
North Tipperary	13.1	19.2	12.4	30.2
Donegal	7.6	16.6	5.5	26.0
Kilkenny	6.3	28.8	14.2	18.0
Meath	10.0	14.0	6.8	58.0
Wicklow	24.0	4.0	2.0	40.0

**Source:** DTZ Pidea Consulting County Research 2002

## Mode of Travel

- 2.30 Table 2.8 shows that overall the main mode of travel (71% of respondents in the Mid West) was by car with some important variations between the towns/centres. Car

travel was very important for those surveyed in the three shopping centres (Jetland, Parkway and Crescent) as well as Ennis and Thurles. The provision and availability of free car parking at the shopping centres as well as the wider role they serve would explain the dominance of car-borne shoppers. The car was less important in Templemore, Limerick City Centre and Kilrush where there was a higher proportion of respondents who walked to the shops. Limerick City Centre was the only centre where public transport was relatively important, with 13% having travelled by bus.

**Table 2.8**  
**Main Mode of Travel (%)**

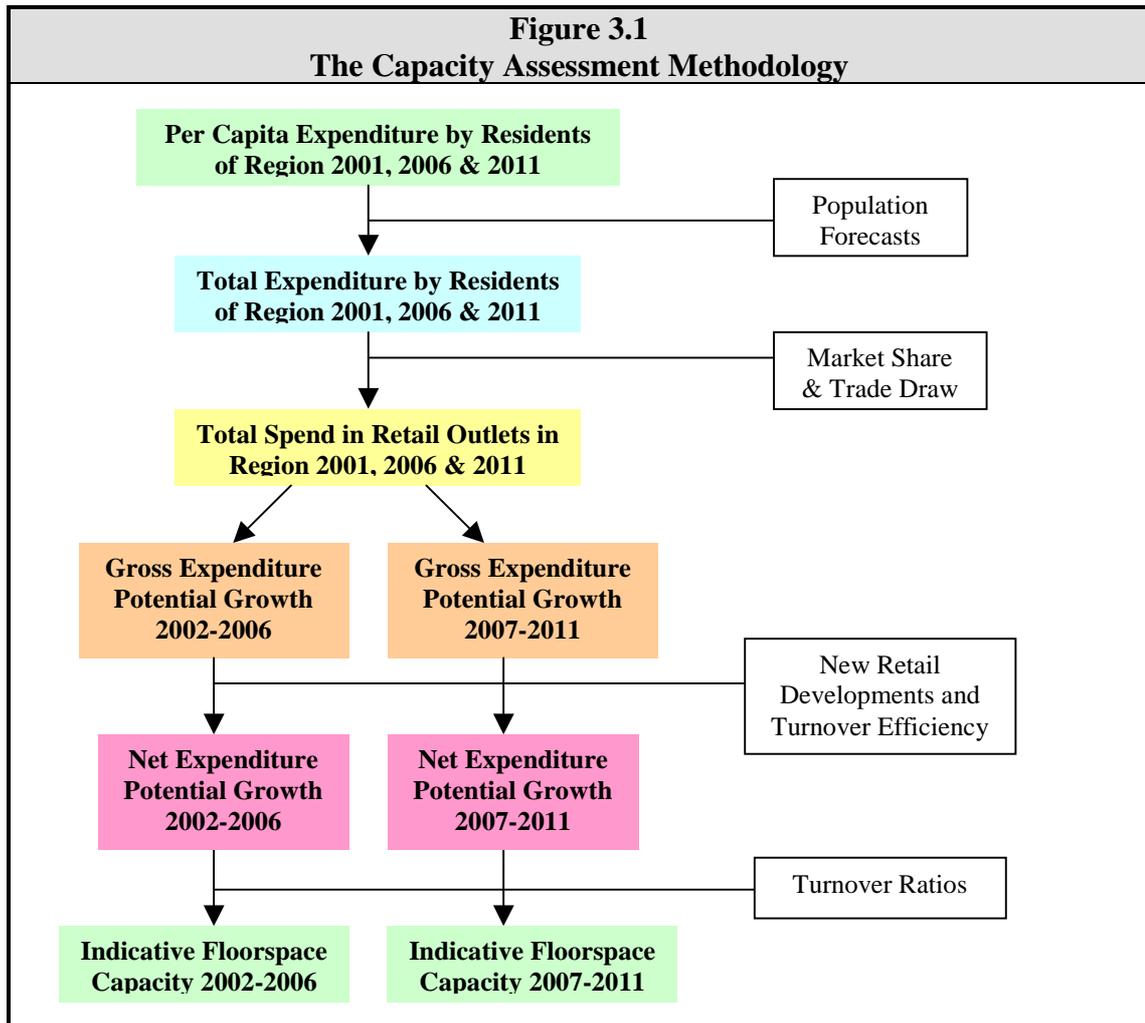
Mode	Nenagh	Thurles	Templemore	Roscrea	Limerick Centre	Jetland	Crescent	Parkway	Newcastlewest	Ennis	Shannon	Kilrush	Mid West
Car	64	78	29	58	55	91	79	83	63	91	60	57	71
Walk	36	20	65	64	29	5	9	13	33	6	28	43	21
Bus	0	2	3	8	13	2	7	1	1	1	3	0	5
Bicycle	0	0	0	0	0	0	1	0	0	0	0	0	0
Other*	0	0	3	0	4	2	3	3	2	3	9	0	2
Total	100	100	100	100	100	100	100	100	100	100	100	100	100
<b>Note:</b> * Motorbike and train not categorised.													
<b>Source:</b> Lansdowne Market Research Shopper Survey January and February 2002													

### **3. BROAD ASSESSMENT OF ADDITIONAL FLOORSPACE**

- 3.1 One of the key requirements of the RPG is that retail strategies should provide a broad assessment of the additional retail floorspace required in counties over the lifetime of their strategies. The assessment provides an indication of the need for additional retail floorspace in the Region as a whole, based on the forecast growth in expenditure in retail outlets that will occur over the period of the Strategy to 2011.
- 3.2 The starting point for this exercise is estimating the current per capita expenditure on retail goods by persons living in the Region, a challenge in its self given the lack of up to date expenditure information available at the national level. Per capita expenditure is then projected forward to 2011 and converted to total expenditure using Region level population forecasts. Given the technical nature of this exercise, it has been confined to the accompanying Technical Appendix with only the results presented in the Strategy. The same exercise has been undertaken for all of the County/City Retail Strategies and is presented separately in each.

#### **PRINCIPLES & OBJECTIVES**

- 3.3 The capacity assessment is the mechanism used to estimate the amount of additional expenditure that will occur in the Region over the period of the Retail Strategy and the type and amount of additional floorspace that could be sustained by this expenditure. At the same time, allowances must be made for any:
- i New retail outlets that are planned to come on stream – known as extant planning permissions;
  - ii Increases in sales in existing stores due to improvements in turnover efficiency; and
  - iii Expenditure in alternative forms of retailing – this includes e-retailing, mail order sales and market stalls. It excludes wholesale retail and car sales outlets, as laid down by the RPG.
- 3.4 Figure 3.1 provides an overview of the process used in undertaking the capacity assessment.



3.5 The key steps are as follows:

- **Step 1:** Expenditure Estimates in the Mid West
- **Step 2:** Gross Additional Expenditure Potential
- **Step 3:** Future Sources of Retail Sales
- **Step 4:** Net Additional Expenditure Potential
- **Step 5:** Capacity Potential.

#### EXPENDITURE ESTIMATES IN THE MID WEST

3.6 The first step is to estimate the per capita and total expenditure estimates in the Mid West up to 2011. These are derived from the CSO's 1998 Annual Services Inquiry, which provides data on turnover in retail outlets at the national level, and from the CSO publication County Incomes and Regional GDP 1995-99. We find that total

disposable income in the Region accounted for 8.7% of the national figure in 1998. Assuming this relationship holds with expenditure, we apply this percentage to the national convenience and comparison figures to give the estimates for the Mid West. Applying the population estimates to these figures provides us with per capita expenditure estimates.

- 3.7 Using national convenience and comparison growth rates derived from the CSO National Income and Expenditure Accounts and the Retail Sales Index, we are able to project these figures forward to 2001.
- 3.8 We then apply the ESRI growth rates of personal consumption to derive the forecasts of per capita expenditure to 2006 and 2011. The low growth scenario assumes annual per capita expenditure growth rates in the Mid West Region are 25% lower than those used for the high growth scenario. Table 3.1 sets out the population, and the per capita and total expenditure estimates for the Mid West up to 2011.

<b>Table 3.1</b>					
<b>Per Capita and Total Expenditure by the Resident Population in the Mid West</b>					
<b>On Retail Goods sold in All Retail Outlets (2001 prices)</b>					
	<b>Per Capita Expenditure</b>		<b>Population</b>	<b>Total Expenditure</b>	
<b>Year</b>	<b>Conv (€)</b>	<b>Comp (€)</b>		<b>Conv (€m)</b>	<b>Comp (€m)</b>
2001	2,972	3,220	347,516	1,032.8	1,118.9
2006 High	3,333	4,144	376,255	1,254.1	1,559.2
2006 Low	3,240	3,884		1,218.9	1,461.4
2011 High	3,738	4,916	407,675	1,523.9	2,004.1
2011 Low	3,531	4,390		1,439.7	1,789.7

- 3.9 To clarify what we mean by expenditure, we consider the spend by persons on retail goods sold in retail outlets. Therefore, an allowance must be made for retail expenditure that does not occur via retail outlets but through other mediums, such as mail order sales or the Internet. From our research, it was assumed the Internet would be the main source of such sales and will impact mainly on comparison retailing, while having no significant effect on convenience retailing. We allow for Internet retailing to account for 1.5% of comparison expenditure in 2006 and 4% in 2011. The figures in Table 3.1 have been adjusted to reflect this.
- 3.10 The population estimates in the table are derived from the 1996 Census of Population and the forecasts provided in the respective housing strategies of the four local authorities. We have highlighted in Section 2 that in the final stages of the preparation of the Strategy the preliminary results of the 2002 Census and NSS were published. It was agreed with the Client Group that it was important that these should be addressed in the capacity assessment but that it was not possible to re-run the model in full due to time and resource constraints. The results of exercise are provided in the final sub section of this section.

### GROSS ADDITIONAL EXPENDITURE POTENTIAL

- 3.11 In order to estimate the additional expenditure available over the Strategy period, we need to firstly estimate the amount of spend (turnover) in retail outlets in the Region. This is equal to:
- i The total expenditure available in the Region (from Table 3.1): **less**;
  - ii The amount of leakage to outside of the Region (proportion retained is known as the market share): **plus**;
  - iii The amount of imported spend from tourists and visitors from beyond the Region (also known as the trade draw).
- 3.12 The household survey indicates that the Mid West has almost 100% and 93.7% market share in convenience and comparison goods respectively which is an extremely high level of retention and minimal leakage of expenditure. However, the shopper survey found that there was very little inflow of retail expenditure to the Region. As has been highlighted, these figures can largely be attributed to the timing of the surveys in January and February 2002. Visitors and tourism are important within the Mid West's economy and adjustments have been made to the assessment to reflect a higher and more representative trade draw. The adjustments have been informed by review of market share and trade draw figures in other retail strategies we have prepared plus, as the control factor, testing the adjustments against the turnover figures that should be expected.
- 3.13 Table 3.2 sets out the total spend (turnover) in retail outlets in the Region for 2001 and projects this forward to 2006 and 2011. The market and trade draw shares derived from the household and shopper surveys are assumed to hold for 2006 and 2011. The trade draw has been increased to 10% and 20% for convenience and comparison shopping respectively. We would highlight that this is for the Region as a whole. The figures are varied for the different County/City capacity exercises to reflect the different attractions and characteristics of key centres around the Mid West.

<b>Table 3.2</b>						
<b>Forecast Expenditure in Retail Outlets in the Mid West (2001 prices, €m)</b>						
Period	Convenience			Comparison		
	%	Low	High	%	Low	High
<u>2001</u>						
Resident Expenditure		1,032.8			1,118.9	
Less Expenditure Outflow	0	0.0		3	33.6	
Spend by Resident on Outlets in Region		1,032.8			1,085.3	
Add Imported Expenditure	10	114.8		20	271.3	
<b>Spend in Retail Outlets in Mid West</b>		<b>1,147.6</b>			<b>1,356.6</b>	
<u>2006</u>						
Resident Expenditure		1,254.1	1,218.9		1,461.4	1,559.2
Less Expenditure Outflow	0	0.0	0.0	3	43.8	46.8
Spend by Resident on Outlets in Region		1,254.1	1,218.9		1,417.6	1,512.5
Add Imported Expenditure	10	139.3	135.4	20	354.4	378.1
<b>Spend in Retail Outlets in Mid West</b>		<b>1,393.4</b>	<b>1,354.4</b>		<b>1,772.0</b>	<b>1,890.6</b>
<u>2011</u>						
Resident Expenditure		1,523.9	1,439.7		1,789.7	2,004.1
Less Expenditure Outflow	0	0.0	0.0	3	53.7	60.1
Spend by Resident on Outlets in Region		1,523.9	1,439.7		1,736.0	1,943.9
Add Imported Expenditure	10	169.3	160.0	20	434.0	486.0
<b>Spend in Retail Outlets in Mid West</b>		<b>1,693.2</b>	<b>1,599.6</b>		<b>2,170.0</b>	<b>2,429.9</b>

- 3.14 Finally, subtracting the 2006 figure from the 2001 figure (and the 2011 figure from the 2006 figure) in Table 3.2 provides the gross additional spend in the Region. This is set out in Table 3.3.

<b>Table 3.3</b>				
<b>Forecast Gross Expenditure Growth Potential (2001 prices, €m)</b>				
Period	Convenience		Comparison	
	Low	High	Low	High
2002-2006	206.8	245.8	415.4	534.0
2007-2011	245.3	299.8	398.0	539.3
<b>Total</b>	<b>452.1</b>	<b>545.6</b>	<b>813.4</b>	<b>1,073.3</b>

### FUTURE SOURCES OF RETAIL SALES

- 3.15 Some of the gross additional potential expenditure will be captured by other sources of retail sales and will have a bearing over the period 2002 to 2011. We have already accounted for e-retailing/the Internet. The other main sources are extant planning permissions and increased floorspace efficiency.

- 3.16 The new retail developments will capture €30.9m of convenience and €1.9m comparison floorspace turnover over the period to 2006. Turnover efficiency growth arising from existing retail outlets will catch additional comparison expenditure of €7.1m up to 2006 and €0.0m to 2011. The new developments will also generate turnover efficiency growth of €3.2m between 2007 and 2011.

#### NET ADDITIONAL EXPENDITURE POTENTIAL

- 3.17 Subtracting the expenditure arising from the extant permissions and turnover efficiency from the gross additional expenditure potential, results in estimates for the net additional expenditure potential for the period 2002 to 2011. These are provided in Table 3.4.

Period	Convenience		Comparison	
	Low	High	Low	High
2002-2006	175.9	214.9	353.5	402.9
2007-2011	245.3	299.8	394.9	463.4
<b>Total</b>	<b>412.2</b>	<b>514.7</b>	<b>748.4</b>	<b>866.3</b>

#### INDICATIVE FLOORSPACE CAPACITY

- 3.18 Now that we know how much additional expenditure will be available in the Region, we need to ascertain what this means in terms of the capacity for additional retail floorspace over the lifespan of the Strategy. To do this, we apply turnover ratios to the net additional expenditure estimates set out in Table 3.4. However, before we proceed with this, some assumptions need to be made regarding the distribution of the additional expenditure in the Region. Based on convention in the industry, we assume that 70% of the additional convenience expenditure will occur as a result of main food shopping with the remainder on top-up shopping. Hence we apply the turnover ratio of €14,065 per m<sup>2</sup> for supermarkets and €1,955 per m<sup>2</sup> for local convenience stores. We assume that all the additional comparison expenditure will be in low/middle order retail outlets and apply a ratio of €6,330 per m<sup>2</sup> which represents an average as there will be a mix of low, middle and higher order comparison floorspace. These turnover ratios have been derived from detailed work we have undertaken since 2000 and have been adjusted to reflect the position in 2002. They are higher than the average found for existing floorspace given that much of this is old and inefficient.
- 3.19 Table 3.5 sets out the broad assessment of the additional retail floorspace that will be required in the Mid West over the period of the Retail Strategy. It must be stressed that, consistent with the RPG requirements, the figures presented are indicative and

should be treated as **broad planning guidelines**. They are not intended to be prescriptive.

<b>Table 3.5</b>				
<b>Indicative Net Floorspace Capacity – Mid West (m<sup>2</sup>)</b>				
<b>Period</b>	<b>Convenience</b>		<b>Comparison</b>	
	<b>Low</b>	<b>High</b>	<b>Low</b>	<b>High</b>
2002-2006	13,200	16,100	55,800	63,600
2007-2011	18,400	22,400	62,400	73,200
<b>Total</b>	<b>31,600</b>	<b>38,500</b>	<b>118,200</b>	<b>136,800</b>

- 3.20 To put these figures into context, the current estimated floorspace in the Mid West, based on the floorspace surveys, totals 266,380m<sup>2</sup>. Under the high scenario, the potential additional floorspace capacity to 2011 is 175,300m<sup>2</sup>. This is between 60 – 70% of the floorspace that currently exists and has developed/expanded over generations. The figures are additional to floorspace that already has permission. It is a significant quantum of potential over a relatively short timescale.

#### REVISED INDICATIVE FLOORSPACE CAPACITY

- 3.21 Review of the preliminary results of the 2002 Census and the NSS forecasts results in a reduction in the indicative capacity potential for additional floorspace in the Region over the period to 2006 and 2011. This is illustrated in Table 3.6.

<b>Table 3.6</b>				
<b>Revised Indicative Net Floorspace Capacity – Mid West (m<sup>2</sup>)</b>				
<b>Period</b>	<b>Convenience</b>		<b>Comparison</b>	
	<b>Low</b>	<b>High</b>	<b>Low</b>	<b>High</b>
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>

- 3.22 Taking the high scenario, the figures are of the order of 83% for convenience and 85% for comparison of the indicative capacities generated by the baseline model. Again, the quantum can be highlighted by reference to the existing total floorspace of 266,380m<sup>2</sup>. The potential additional floorspace, excluding that with planning permission, is some 56% of existing levels. Whilst much less than the baseline model, it is also a significant quantum of floorspace and potential given that it could be delivered over what is now a nine year period particularly when set against existing provision and the timescale this has emerged over.



## **4. INFLUENCES ON THE STRATEGY**

4.1 Preparation of the Retail Strategy for the Mid West Region is not starting with a blank piece of paper. There are a number of national, regional and local influences that require to be given due regard. This is particularly important given that, as with all other regions of the country, unlike the GDA at present there are no Strategic Planning Guidelines to provide the regional framework for land use and transportation planning. The Retail Strategy to a degree represents a first step in this direction and as such needs to take account of the different policy contexts and objectives of the four local authorities that comprise the Mid West Region. This is fundamental in the absence of an adopted regional framework if consensus is to be achieved on the strategic principles that will require to be incorporated in the individual County/City Retail Strategies and the different County, City and Town Council development plans. The key influences that should be taken account of are:

- i National plans, strategies and guidelines;
- ii Statutory development plans;
- iii Emerging land use and transportation plans;
- iv Shopping patterns, consumer and market demand;
- v Retail trends; and
- vi Consultations with Members.

### **NATIONAL PLANS, STRATEGIES AND GUIDELINES**

4.2 There are a number of national level plans, strategies and guidelines that are of particular relevance to the shape of the Region's Retail Strategy and the direction that it takes. These are:

- National Development Plan
- National Spatial Strategy
- Sustainable Development: A Strategy for Ireland
- Ensuring the Future – A Strategy for Rural Development in Ireland
- Retail Planning Guidelines for Local Authorities.

4.3 All of these plans, strategies and guidelines have been reviewed in the preparation of the Regional and County/City Retail Strategies. In terms of the framework for the

strategies, the most important national policy influence are the RPG. The guidelines outline a number of strategic policy objectives which seek to accommodate additional development in a way that is *'efficient, equitable and sustainable'*. They recognise the challenge of policy intervention in retail development and set the following five key objectives for strategies:

- i To ensure that in future all development plans should incorporate clear policies and proposals for retail development;
- ii To facilitate a competitive and healthy environment for the retail industry of the future. The guidelines explicitly state (paragraph 23) *"In interpreting these guidelines local authorities should avoid taking actions which would adversely affect competition in the retail market."*;
- iii To promote forms of retail development which are easily accessible – particularly by public transport – in a location which encourages multi-purpose shopping, business and leisure trips on the same journey;
- iv To support the continuing role of town and district centres with the former being the preferred location for retail development in view of generally better accessibility for both public transport and the private car. Where town centre locations are not available, firstly edge of centre and secondly out of centre locations should be considered with accessibility being a key criteria to be addressed. It is however recognised that town centre and edge of centre locations may not be the most appropriate for retail warehousing and the sale of bulky goods; and
- v A presumption against large retail centres located adjacent or close to existing, new or planned national roads/motorways.

4.4 In addition to general policy and objectives, all new retail development in the Mid West must have regard to the specific provisions of the RPG. Table 4.1 summarises the main provisions of the guidelines in relation to the assessment of new specialist retail development.

<b>Table 4.1</b>	
<b>Summary Of Provisions Of RPG In Relation To Assessing New Specialist Development</b>	
<b>Type Of Development</b>	<b>Recommendations</b>
<b>Regional Shopping Centres</b> (Paragraph 68-70)	Defined as <i>out-of-town retail malls generally of 50,000m<sup>2</sup> plus (gross), typically enclosing a wide range of clothing and other comparison goods with extensive dedicated car parking.</i> Cannot be justified in the Irish context, with the possible exception of Dublin. Outside of Dublin, <i>'no justification in any circumstances'</i> due to sustainability considerations and strategic transport objectives. General presumption against large out-of-centre regional centres.
<b>District Centres</b> (Paragraph 71/72)	Likely to comprise in the order of 10,000m <sup>2</sup> in or adjacent to the main towns depending on population density in the catchment area, and up to 20,000m <sup>2</sup> within some parts of Dublin. Development Plans will identify the need for new District Centres or extensions of existing centres.
<b>Large Foodstores</b> (Paragraph 73-75)	Floorspace caps apply to the total net retail sales space delineated on application drawings and are as follows: Greater Dublin Area - 3,500m <sup>2</sup> Outside the Greater Dublin Area - 3,000m <sup>2</sup>
<b>Discount Foodstores</b> (Paragraph 76)	Generally have an area of approx. 1,000-1,500m <sup>2</sup> gross floorspace. Can effectively anchor smaller centres or neighbourhood centres. Re-use of existing non-retail or vacant premises should be promoted.
<b>Retail Parks and Retail Warehousing</b> (Paragraph 77-84)	The special requirements of retail warehouses, due to their space extensive operations and car parking requirements, are recognised, and the possibility of retail warehouse groups on the edge and outside of the town centre is accepted in principle. (para 79) Applications for individual retail warehouses outside a town centre or on its edge should be discouraged in order to reduce trip generation. A Retail Park in the range 8,000m <sup>2</sup> to 15,000m <sup>2</sup> is unlikely to have an adverse impact on a town centre provided that the range of goods sold is limited to truly bulky household goods or goods generally sold in bulk. The imposition of conditions to planning permissions restricting the minimum permissible unit size to not less than 700m <sup>2</sup> is recommended. Retail warehouses in excess of 6,000m <sup>2</sup> are unlikely to be acceptable due to local monopoly effects and their effect on the surrounding road network.
<b>Factory Outlet Centres</b> (Paragraph 85-88)	The potential impact on existing town centres is identified. Should be assessed having regard to the criteria set out in paragraph 65. Particular attention should be given to locations on the edge-of-town centres or where a short, high quality public transport link can be provided.
<b>Retail Warehouse Clubs</b> (Paragraph 89)	The RPG state that these outlets share many of the characteristics of large retail outlets and should be subject to the same policy provisions as normal retail businesses.
<b>Shops in Small Towns and Rural Areas</b> (Paragraph 90-92)	There is a strong presumption in the RPG in favour of maintaining and supporting local facilities in small towns and villages that provide a valuable service to the local community.
<b>Village Shops in Rural Areas</b> (Paragraph 93/94)	The important social and economic role of the village shop in rural areas is recognised. Such facilities should where possible be directed to existing settlements except in certain circumstances.
<b>Local Shops</b> (Paragraph 95)	Local shops have an important social and economic function within an urban setting. The Guidelines state that these facilities should be protected through appropriate land use zoning in development plans.
<b>Petrol Filling Stations</b> (Paragraph 96-98)	Such shops should, in general, remain as ancillary to the main use of the site as a petrol filling station. For a shop exceeding 100m <sup>2</sup> the development should be treated as a normal retail development and the appropriate criteria applied.

4.5 An important objective of the Mid West Retail Strategy, as required by the RPG, is to confirm the retail hierarchy for the Region. This will rank the towns in order of their importance as retailing centres and as such will provide **strategic guidance** on the location and scale of retail development.

- 4.6 The RPG sets a five tier hierarchy and describes in summary the key characteristics that have been considered in determining where different centres should sit in the national retail hierarchy. The only **Tier 1** centre in the national hierarchy is Dublin which as well as providing the broadest range of comparison goods shopping, it supplies retail functions of a specialist nature not found elsewhere in the State. The main cities in the country, **Limerick**, Cork, Galway and Waterford are the **Tier 2** centres in the national hierarchy. With Dublin, these centres provide a range of high order comparison shopping which is largely unmatched elsewhere. The RPG identifies a split level **Tier 3** of centres and, although they state that these cannot be precisely defined, the guidelines identify the centres that sit in both levels of this third tier. **Ennis** is the only centre in the Region identified as a **Level 1 Tier 3** centre. These centres are acknowledged as vibrant centres and that some of are now attaining functions previously found only in higher order centres. These three first tiers in the hierarchy account for 78% of comparison and some 66% of convenience turnover respectively.
- 4.7 The guidelines recognise that there is another group of centres that may also be regarded as third tier centres in the national hierarchy, *'albeit to a more limited extent'*. **Nenagh** and **Thurles** are identified as **Level 2 Tier 3** centres. It is important to highlight that the guidelines only provide examples of the centres that are within this tier of the hierarchy. Based on its size and characteristics, **Shannon** should also be defined as a Level 2 Tier 3 centre. The RPG **Tier 4** centres are identified as being small towns in the 1,500 to 5,000 category which largely provide basic convenience and lower order comparison shopping. Founded on the 1996 Census, **Abbeyfeale**, **Kilrush**, **Newcastlewest**, **Newmarket-on-Fergus**, **Rathkeale**, **Roscrea**, and **Templemore** are centres which meet this criteria. Review of the preliminary results of the 2002 Census indicates that **Adare**, **Kilkee**, **Kilmallock** and **Sixmilebridge** would all now be within this tier of the national retail hierarchy. The final tier in the hierarchy is identified as shopping at the most local level, namely corner shops in suburban areas and village stores and post offices. The centres that are within this tier have populations under the 1,500 threshold set for Tier 4 centres. Table 4.2 summarises application of the national hierarchy at the Regional level.

<b>Table 4.2 RPG Retail Hierarchy – Mid West Region</b>		
<b>Tier</b>	<b>Location</b>	<b>Function</b>
2	Limerick	Convenience and high order comparison largely unmatched elsewhere.
3 Level 1	Ennis	Convenience, comparison and now attaining functions previously only found in higher order centres.
3 Level 2	Nenagh, Shannon and Thurles	Third tier to a more limited extent contains convenience goods outlets on a par with the core third tier towns. Most have national supermarket chain representation. Important in less densely populated areas of the State.
4	Towns with a population of 1,500 – 5,000	Basic convenience shopping in small supermarkets or convenience shops. In some cases lower order comparison shopping such as hardware.
5	Corner shops, village stores and post offices at a local level. <b>All other villages in the Mid West with a population under 1,500</b>	Rural shops and post office noted for their importance in supporting social and economic life.

#### STATUTORY DEVELOPMENT PLANS

- 4.8 The majority of the development plans in the Mid West Region were prepared prior to the publication of the RPG. Consequently, only recently produced plans or plans in preparation have detailed retail policies and defined retail and/or settlement hierarchies. In addition, there are areas the Region where plans have not been prepared and hence there is no policy guidance on centres in such areas, such as the north and east of Clare. This noted, it is important to review the structures and hierarchies that are emerging within each of the local authority areas. These are summarised in Table 4.3.

<b>Table 4.3</b>	
<b>Summary of Development Plan Settlement Hierarchies/Priorities as in the Statutory and Emerging Development Plans in the Mid West Region</b>	
<b>COUNTY CLARE</b>	
Large Town	Main population and retail centres in County
Small Town	Capable of supporting expansion
Village	Expansion should be more controlled
Small Village	Limited development should take place in the immediate future – consolidation rather expansion
Clusters	Outside settlement boundaries and subject to rural housing policies
<b>LIMERICK COUNTY</b>	
<b>Metropolitan Area</b>	
Regional Shopping Centre	Regional level shopping for local, City and County residents with scope for expansion
District Shopping Centres	District level shopping predominantly serving local needs but also for many in the City and the County, scope for expansion and/or new centres
Neighbourhood Shopping Centres	Serve a type of shopping below that of district shopping centres meeting the very local convenience needs of local people
<b>LIMERICK COUNTY</b>	
<b>Non-Metropolitan Area</b>	
Primary Retail Centre	Town centres in main towns that serve wider rural hinterlands, need to strengthen and improve through sustainable development that responds to retail trends
Secondary Retail Centres	Facilitate the provision of convenience shops and small scale shops related to agricultural products and tourism or recreational development in key villages
Small Village Centres	Facilitate the provision of convenience shops that meet local need particularly where this is zoned residential expansion
<b>LIMERICK CITY</b>	
City Centre	Promotion commercial and trading development, improvement of the competitive position of the City for convenience and comparison shopping and encouragement of further development in the City Centre through renewal of central urban areas
District Shopping Centres	Encourage and facilitate increased and sustainable growth in existing district level shopping centres
Neighbourhood Shopping Centres	Serve a type of shopping below that of district shopping centres meeting the very local convenience needs of local people
<b>NORTH TIPPERARY</b>	
Town Centres	Protection and enhancement of the retail role of the main town centres through expansion of retail floorspace within core shopping streets and their hinterland areas
Village Centres	Encourage growth of small towns and villages to complement the retail provision in the main towns, with an emphasis on infill development

#### **LAND USE AND TRANSPORTATION PLANS**

- 4.9 The Limerick Planning Land-Use and Transportation Study (PLUTS) has the objective of producing a strategy for the planning, land use development and transport systems of the Greater Limerick Area. This area comprises the City, and parts of Limerick, Clare and North Tipperary counties, essentially where the majority of the population in the Region live. The geographical focus of the study is the four main

transportation corridors that radiate from Limerick City which contain a National Primary Road and railway line. It sets out strategic principles in respect of settlement strategy. As such, they require to be taken into account in evolving the Regional Retail Hierarchy. The PLUTS study identifies four different levels of centre in the study area. These are:

- **Principal Centre:** Limerick City
- **Primary Development Centre:** Ennis, Nenagh and Shannon
- **Secondary Development Centre:** Adare, Caherconlish, Castleconnell, Croom, Newmarket-on-Fergus, Patrickswell and Sixmilebridge
- **Key Centres outside of the Transportation Corridor:** Kilmallock and Newcastlewest
- **Port and Estuary Activities:** Foynes/Askeaton
- **Other Centres:** all other places to be developed to meet local needs.

#### SHOPPING PATTERNS, CONSUMER AND MARKET DEMAND

- 4.10 The household and shopper surveys provide valuable information on the strengths and weaknesses of retailing in centres across the Region and the Regional and County/City Retail Strategies must provide the policy mechanisms to harness the assets and address the deficiencies.
- 4.11 The surveys also serve to inform what the current Regional Retail Hierarchy is through the attraction of different centres for different types of goods and shopping. This is the hierarchy set by consumer choice which may not reflect the role, administrative, social and cultural importance and population size of centres in the broader settlement hierarchy that prevails. These are equally important attributes and influences that require to be taken into account in the determination of retail hierarchies. This noted, the research identifies a number of important trends relating to the trade draw of different centres that help inform definition of the Regional Retail Hierarchy. These can be summarised as:
- i Limerick City Centre is confirmed as the retail centre of regional, county and local importance;
  - ii The Crescent and Jetland and Shopping Centres are of regional importance attracting shoppers from a considerable distance, with Parkway to a lesser extent;
  - iii Key retail centres in their respective counties are Ennis, Kilrush, Nenagh, Newcastlewest and Thurles; and

- iv Key centres that serve a more local role are Roscrea, Shannon and Templemore.

## RETAIL TRENDS

- 4.12 Ireland has for most of the last decade witnessed unprecedented rates of economic growth. Retail sales in the country grew by a staggering 60%<sup>1</sup> during the period 1990-1996. They grew by a further 42% between 1996 and 2000. This growth has manifested itself in the retail sector through increased floorspace and increased volume rates of growth. It has also brought with it emerging trends and new forms of retailing not previously present in our retail market. Outlined below is a summary of the key emerging trends.
- 4.13 **Reduction in the Number of Small Independent Retailers:** this has been the trend across the country and one that is set to continue. A number of factors underpin this with competition from national and international multiples and symbol group stores (Spar, Centra, Mace etc...) being a main feature of the trend. While it is anticipated there will be further decline in the number of independents, they still form a significantly high proportion of the shops in the Region's centres. This is confirmed by our analysis which indicates that they represent between 83% – 91% of shops in the main centres of the Mid West with examples being Ennis at 83%, Limerick City Centre and Thurles at 85% and Kilrush at 91%.
- 4.14 **Increased Concentration Amongst Fewer Multiples/Operators:** there is clear evidence that this is happening throughout the Region for main food shopping. For example in the Limerick City Council area, the household survey found that over 52% of all main food shopping was either at Dunnes Stores (40% of respondents) at the Jetland or Parkway Shopping Centres or Tesco at the Crescent. This trend is also evident, in the more rural counties of the Region.
- 4.15 **Fewer Shops:** in Ireland overall there has been a decrease in the number of convenience retail units and an increase in comparison retail units. In the Mid West Region, there is little evidence of retail units closing. In many towns retail uses are changing to service industries such as financial institutions and restaurants. In respect of the latter, this has improved the ambience of centres and their attraction to visitors.
- 4.16 **Small Store Formats:** these are smaller units developed by the larger retailers and adapted to be more suitable to the high street. Examples are Tesco Metro and SuperQ (one store in Dublin) which is an alliance with Superquinn and Texaco for stores at their petrol stations. There are none in the Mid West Region at the moment but there is likely to be scope for this format in the larger centres.

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<sup>1</sup> Forfàs and Goodbody Report

- 4.17 **Larger Supermarkets and Non-Food Retail Units:** in respect of large supermarkets/superstores, the RPG have placed a cap on such stores at 3,000m<sup>2</sup> throughout the country, with the exception of the Dublin/GDA area where it is 3,500m<sup>2</sup>. It can be anticipated that the larger multiple and symbol group operators will seek to enhance and improve their retail offer and presence in the Region over the timescale of the Strategy. Noting this, to date the cap is well below the average size of stores that have been developed/are operating. The non-food/hypermarket format of operation which involves food and non food co-located together under the one roof is new to Ireland. Tesco has however received planning consent for the first hypermarket in the country in North Dublin. Given the critical mass of population in the Limerick Metropolitan Area plus its importance regionally, there is likely to be interest in the introduction of this format around the City.
- 4.18 **The Emergence of New Forms of Retailing:** these include retail warehousing, retail parks, factory outlet centres(FOCs), warehouse clubs and e-retailing. These new forms of retailing have different locational requirements to conventional forms and therefore will have a different distribution to the traditional high street shops:
- Retail warehousing is not new to the Region but the clustering of stores in retail parks is increasingly the format sought. In addition to bulky goods, these parks are selling a wide range of products and services.
  - There has been an increasing demand for very large standalone retail units, predominantly from the DIY sector although there are other specialist 'concept' furniture retailers. The full potential of this sector of the retail market when compared to trends in the rest of Europe is at present limited by the RPG caps.
  - There are no FOCs in the Region and in fact there are only two operating in Ireland at present – Killarney and Rathdowney. In contrast to the experience in the UK, these centres have not performed as well as their anticipated potential. Whilst there may be greater potential in and around the Limerick Metropolitan Area due to critical mass of population, better transport/road links and the attraction of the City's retail offer, it is unlikely that there will be development of new FOCs until the existing outlets are trading well.
  - Warehouse clubs or discount clubs have not yet become a feature of retailing in Ireland. As stated in the RPG, these combine elements of cash and carry wholesaling with sales to qualifying members of the public. While promoted as a specialist form of retailing, they should be treated as retail businesses and assessed as such under the requirements of the RPG.
  - Interestingly, the uptake of e-retailing may be higher in the Mid West Region than in other regions based on the findings from other retail

strategies. The household survey found that overall 9% of respondents had used the Internet to carryout purchases in the last six months. This was especially high in the Shannon area. Internet retailing in Ireland is still in its infancy but it may not grow to be a major part of future shopping trends. This is because:

- It is largely found in areas of high concentrations of population. Experience from the UK indicates it prevails around the English conurbations with little in Northern Ireland, Scotland or Wales.
- There is little tradition of ‘other’ forms of retailing in Ireland, such as mail order.

- 4.19 **Discount Food Stores:** are a relatively new form of convenience retailing that mainly is being expanded by major European operators. The RPG identify discount stores as having different characteristics to mainstream superstores and supermarkets and as such different trade draw patterns. Additionally, they are seen as a format that has a potential role in extending the choice and range of retailing particularly for certain sectors of the community. They are already present in different centres around the Mid West and the operators are promoting further market penetration.
- 4.20 **Petrol Filling Stations:** as recognised in the RPG, forecourt retailing has an important role as the local shop and supermarket in rural areas and this has been confirmed by our research and consultations with Council Officers. In fact, in many villages they are now in many cases the only retail outlet. There will be continuing pressure for further forecourt retailing as this often aids the viability of the petrol filling station business in rural areas. The RPG do not seek to prevent this but set out the considerations that require to be taken into account in determining planning applications.
- 4.21 To improve competitiveness, help retain residents’ expenditure and attract visitors and tourists from outside of the Mid West, the Region’s centres must provide a modern shopping offer that captures these trends and innovations in retailing. This will have an influence on shopping patterns and the nature of these patterns. The degree to which this will affect the Region and its towns and villages will depend on a mix of factors. The market is of course very important but the policy framework which is set by the Regional and City/County Retail Strategies **should** be the determining foundation for decision making and future development. This policy framework is greatly influenced by the specific provisions of the RPG(including floorspace caps). The objective of the Mid West and City/County Retail Strategies must be to assist in the understanding and implementation of the RPG within the Region.

## **CONSULTATIONS WITH MEMBERS**

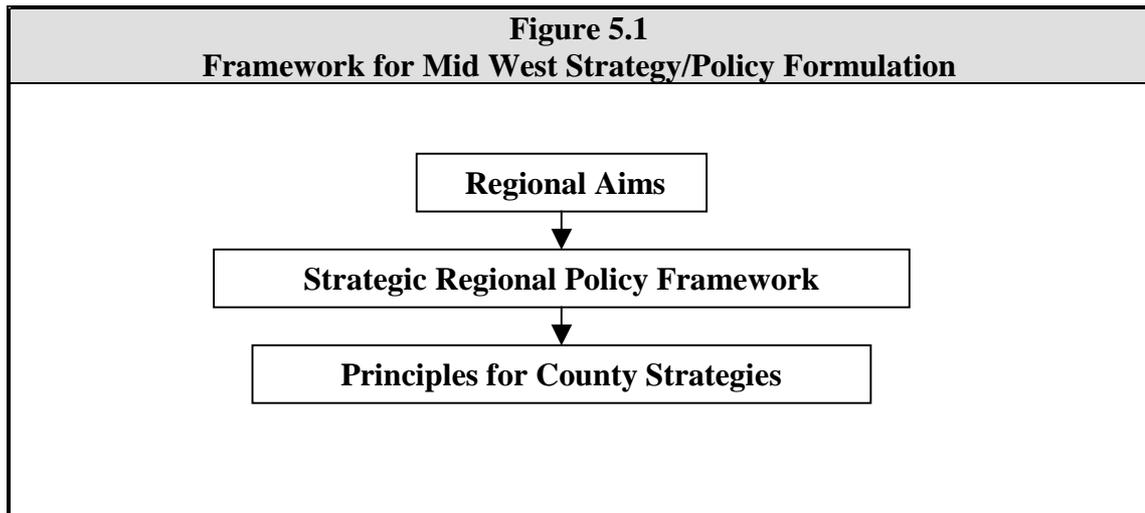
4.22 A Consultation Seminar with Members of the County, City and Town Councils in the Region was held as part of the study in June 2002. The seminar workshops addressed strategic issues and those specific to individual centres and counties. The latter are set out in the County/City Retail Strategies as appropriate. The key strategic issues that were identified at the seminar as important to the Regional Retail Strategy can be identified as:

- The importance of identifying a hierarchy
- The need to ensure a geographical distribution of floorspace and one that enhances smaller centres
- The importance of the Limerick PLUTS Study and its associated growth centres
- Maintain the viability of town centres
- Retention and enhancement of core areas of town centres
- The need for land assembly within the majority of town centres
- The importance of ease of access and parking in encouraging shopping
- The importance of linked trips to all centres
- The quality of the retail offer.



## 5. STRATEGIC RESPONSE – THE RETAIL STRATEGY FOR THE MID WEST

5.1 Every retail planning strategy must be clear as to its purpose and what it is intended to achieve. To ensure this, we have adopted a logical step by step framework which clearly illustrates how the Mid West and County/City Retail Strategies interact. This is summarised in Figure 5.1 below.



### REGIONAL AIMS

5.2 Prior to setting out what the aims of the Regional Retail Strategy are, it is important to clarify its role and purpose and how this differs to what will be addressed in the County and City Retail Strategies. This Strategy is intended to set out an **integrated strategic framework** for retail planning in the Mid West over the period to 2011 that should be translated at the County/City level in retail strategies and development plan variations that are specific to the different local authority areas. This framework addresses factors and issues of a strategic nature which include:

- i Defining the Regional Retail Hierarchy;
- ii The broad assessment of the expenditure potential for additional retail floorspace and how this should be distributed at the local authority level based on the baseline information, capacity assessments and influences set out in the previous sections; and
- iii The principles that guide what the spatial distribution of new floorspace should be and the nature and relative scale of that across the Region.

5.3 The Strategy is therefore not an end in itself. Its primary purpose is to **inform** the statutory planning process and in particular ensure that future development plans/development plan variations make adequate provision for retail development.

To this end, the Strategy provides indicative advice on the scope for new development and how associated floorspace should be distributed. It is the **role and responsibility** of **the local planning authorities in the Region and its main centres** to work within this framework and ensure that the requirements of the RPG can be met through the individual County/City Retail Strategies and development plan variations. At one level, these represent the next stage in strategic policy development and, in parallel, they will also serve to provide guidance at a centre specific level in respect of sites and on the scale, nature and distribution of new floorspace within centres. As such, each of the County/City Strategies will contain their own set of objectives/aims which must be compatible with the principles set out for the Regional Retail Strategy. These are detailed in the individual County/City Retail Strategies.

- 5.4 Fundamental to achieving the continuum set out above is that **consensus** is achieved on the principles promoted in the Regional Retail Strategy and that this is endorsed through the detail of the County/City Retail Strategies and the necessary development plan variations. Failure to achieve this will result in uncertainty and the opportunity for challenge and appeals on retail applications which will have subsequent impacts on the Region achieving its retail potential and meeting the needs of local people in the timescale of the Strategy.
- 5.5 Finally in the Regional Retail Strategy, it is important to look beyond the strategic framework for retail planning. In this regard, the Strategy addresses the following:
- i In accordance with the RPG and founded in the principles of the Strategy, criteria require to be set in respect of how applications for major retail development should be assessed; and
  - ii The Strategy covers the period to 2011. Based on the experience of the last decade, it can be anticipated that there will continue to be considerable change in the retail economy of the Mid West as a result of both internal and external influences. This Strategy and those of the County/City Retail Strategies will be important internal influences. To ensure that there is the best strategic framework and the strategies remain up to date, it is important that there is periodic monitoring and review of the strategies, their baseline information and their effects.
- 5.6 The **overall objective** of the Mid West Retail Strategy is to provide strategic guidance on the location and scale of new retail development and to achieve a distribution which is efficient, equitable and sustainable. These terms are interpreted as:
- **Efficient** – reflects what the market wants – both in terms of suppliers and customers
  - **Equitable** – implies even handed treatment of all sectors of society, ensuring adequate personal accessible to all forms of shopping

- **Sustainable** – implies that selected locations for new development are accessible by local forms of transport, in particular by foot, bicycle and public transport.

5.7 The **aims** of the Regional Retail Strategy respond to the influences of national and local policy and the issues and opportunities that prevail at a Mid West, local authority and specific centre level. The baseline facts and analysis underpinning these aims are summarised in the Strategy and provided in detail in the Technical Appendix and the individual County/City Retail Strategies respectively. They are:

- i To provide an integrated and sustainable approach to retail planning and development across the Region that respects the existing or emerging settlement hierarchy, with specific reference to the objectives of the NSS, and provides the means to strengthen and reinforce this;
- ii To ensure that the Regional Retail Strategy provides the vision and framework to improve the retail competitiveness and attraction of the Region and its centres, redress leakage of resident expenditure, encourage retail innovation and achieve more sustainable shopping travel patterns;
- iii Confirmation that the focus on the town centre(including within this definition Limerick City Centre) is one of the most significant influences on retail planning and development in the Region;
- iv Definition of a regional retail hierarchy that gives guidance as to where major new floorspace and the nature of that floorspace should be located and that this should be appropriate in scale and character to the hierarchical role of the centre;
- v Protection of the importance of Limerick City Centre in accordance with its position within the national retail hierarchy, specifically in respect of its high order comparison shopping role;
- vi To recognise the role and importance of the major retail centres around Limerick City Centre and the City's Environs in the Region's shopping offer and attraction by providing a strategic framework that is determined by shopping patterns, supply and potential rather than administrative boundaries;
- vii Strengthening the role of other centres outside the Limerick Metropolitan Area, particularly those in the upper levels of the hierarchy, to reduce leakage to the Metropolitan Area, better meet needs in the rural Hinterland Area and assist in the sustaining and enhancement of their retail potential and offer. Where appropriate, specific consideration should be given to centres identified as key centres in the Limerick PLUTS study, acknowledging that this did not cover all of the Region;
- viii To recognise the great importance of tourism in the Region's economy and the important role centres at all levels of the hierarchy play in the Mid West's

- offer. The retail strategies should provide the catalyst for enhancing and improving the attraction of centres for shopping and other leisure activities;
- ix Provide the policy framework/principles to ensure that the needs and potential of all centres in the hierarchy and their catchment areas are addressed;
  - x To recognise the particular shopping issues and needs of rural communities and ensure that there is a policy framework that encourages and provides for these being addressed and met in respect of convenience and comparison floorspace;
  - xi To provide the policy framework which recognises that in the absence of suitable and available town centre sites then to enable competitiveness to be sustained and needs to be met then alternative sites will require to be considered, subject to the sequential approach and the assessment criteria set down in the Strategy;
  - xii In accordance with the RPG, recognise that some forms of retailing may be inappropriate for a town centre location and in the interests of enhancing choice, competition and innovation, they should be accommodated in locations offering good levels of accessibility by both private and public transport; and
  - xiii To set within a framework of strategic principles how the quantum of spend and hence new floorspace should be distributed at a local authority level.

### **STRATEGIC POLICY FRAMEWORK**

5.8 To achieve the Mid West Retail Strategy's aims requires consideration of the strategic policy framework that underpins the principles and policies. This framework is set by:

- Consideration of need
- The retail hierarchy
- The sequential approach
- Definition of core retail areas
- Spatial distribution of new retail development.

## Consideration of Need

- 5.9 The population and expenditure forecasts that underpin the retail capacity assessment indicate that over the period of the Strategy there will be substantial amounts of expenditure available within the Region to support both existing convenience and comparison floorspace, that in the pipeline and significant levels of new floorspace. This is illustrated by the fact that the potential additional floorspace, excluding that with planning permission, is some 56% of existing levels which totals over 266,000m<sup>2</sup> (net). The estimation of potential is founded on the preliminary results of the 2002 Census of Population and the forecasts from the recently published NSS. Need and potential is further indicated when the timescale over which it should be delivered is highlighted. The quantum is over the period to 2011 which from now is a nine year period and is a short timescale when set against the significantly longer timeframe within which current levels have been established.
- 5.10 Over the last year, there have been concerns that the boom of the 1990s has passed and that economic forecasts have been and continue to be optimistic. Ireland however continues to out perform its European counterparts and has achieved a more balanced economic structure better able to withstand the recessions of the past. From our research and analysis, the evidence is that growth will continue albeit at a lesser pace than previously enjoyed. The forecasts have built in this factor by having both low and high growth scenarios to accommodate fluctuations in economic growth to 2011. Both forecasts indicate that, set against the existing levels of retail floorspace, over the timescale of the Regional Retail Strategy there is significant potential for additional retail floorspace.

## Retail Hierarchy

- 5.11 Analysis indicates that, apart from the RPG, there is no structured approach to determining what the retail hierarchy for the Region either is or should be. This reflects a number of factors, namely:
- i For the first time through this Strategy and the Limerick PLUTS study, the Region has been looked at as a whole as an integrated planning unit (noting that the latter does not cover all of the Mid West);
  - ii On the whole, adopted development plans for the different local planning authority areas were prepared and published in advance of the RPG, although some took due account of the draft guidelines and the hierarchy therein; and
  - iii Settlement hierarchies may have been considered at a county level but they will have been more broadly based than what is sought in the determination of a Regional/County Retail Hierarchy.

5.12 The RPG national retail hierarchy provides a valuable and clear starting point for consideration of the appropriate structure at a regional level. For simplicity, it could be applied to the Region’s centres with appropriate modifications to reflect other influences and the dynamics of population growth since 1996 and the 2002 Census. The RPG do not however distinguish between the differences between the metropolitan areas of the Region and the more rural hinterland areas and the different functions which similar centres can perform in these two geographical areas. Within the Region, it is important that these differences are recognised. Figure 5.2 illustrates the differentiation and provides the framework to build on.

<b>Figure 5.2 Structure for the Mid West Retail Hierarchy</b>	
<b>METROPOLITAN CENTRE</b>	
<b>METROPOLITAN AREA</b>	<b>HINTERLAND AREA</b>
Main Retail Centre	Major Town Centre
District Centre	Town Centre
Neighbourhood Centre	Small Town/ Village Centre
Local/Corner Shops	Local/Corner Shops

5.13 Application of this framework to the Region’s centres has taken account of the following:

- The RPG national hierarchy
- Statutory development plan settlement strategies
- The Limerick PLUTS
- County and City Development Board integrated strategies for social, economic and cultural development
- Consultation with Members
- Other influences including geographical location, population size and growth, current floorspace levels and the issues and opportunities that prevail.

- 5.14 From a detailed review of existing settlement characteristics and these influences, a hierarchy emerges. The analysis that underpins it is presented in the County/City Retail Strategies. The hierarchy is set out in Table 5.1 and provides the means to:
- i Recognise the role and importance of Limerick City Centre and that of shopping centres in the wider Limerick Metropolitan Area;
  - ii Enhance the Region's competitiveness by clearly identifying the key centres in the hierarchy where major new floorspace should go;
  - iii Strengthen the role and function of key centres around the Mid West;
  - iv Ensure that there is a good geographical distribution of key centres in the hierarchy; and
  - v Differentiate between centres within the different levels of the hierarchy to overcome the issue of classification being indicative.

Table 5.1 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>	<b>MAJOR TOWN CENTRES</b>
	Dooradoyle	<b>Level 1:</b> Clare: Ennis  <b>Level 2:</b> Clare: Shannon <b>Limerick County:</b> Newcastlewest <b>North Tipperary:</b> Nenagh and Thurles
<b>TIER 3</b>	<b>DISTRICT CENTRES</b>	<b>TOWN CENTRES</b>
	<b>Level 1:</b> Caherdavin, Castletroy and Parkway  <b>Level 2:</b> Roxboro Shopping Centre	<b>Level 1:</b> Abbeyfeale Clare: Kilrush North Tipperary: Roscrea  <b>Level 2:</b> Clare: 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: Small Towns</b>  <b>Level 2: Village Centres</b>
<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 introduction of 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. * Small Towns and Village Centres are all those below the 1,500 population threshold set for Tier 4 centres in the RPG hierarchy <b>Source:</b> DTZ Pida Consulting</p>		

5.15 Limerick City Centre functions as the **Metropolitan Centre**. Its role and importance as a Tier 2 centre in the national hierarchy is confirmed by the household and shopper surveys. It is dominated by comparison shopping and has an improving representation of speciality/high order retailing.

5.16 Dooradoyle is the only **Main Retail Centre** in the Metropolitan Area by virtue of its size and attraction. More so than the other freestanding shopping centres located around the City, it has a regional role in the shopping patterns of the Mid West and should have the potential for further comparison floorspace, including some higher order shopping, and offer a wide range of non-retail services.

- 5.17 The **Major Town Centres** perform an equivalent role in the Hinterland Area. There is a differentiation between the towns in this level of the hierarchy, with Ennis being a stronger Sub-Regional Centre than the other towns in Clare, Limerick and North Tipperary Counties that are more limited in size and diversity. The Regional and County/City Strategies should provide the means for Ennis to continue to function at this higher level and for the other centres to grow and improve their offer and regional importance. At present, with the exception of Shannon, these centres perform as County Towns serving their rural hinterlands. In each the convenience and comparison offer requires to be enhanced, with an emphasis on higher and middle order comparison floorspace. Shannon is poorly performing for a town of its size and at present is not a comparable shopping centre to the other Tier 2 towns. Designation of Shannon as a Tier 2(Level 2) centre provides the policy framework for the centre to significantly improve the quantum and quality of its retail floorspace over the period of the Strategy.
- 5.18 There are a number of freestanding **District Centres** distributed around the Metropolitan Area. They are smaller than the Main Retail Centre although they do attract shoppers from across the Mid West which to a degree reflects the quality and range of the offer in the traditional town and village centres. To different degrees, they are anchored by convenience shopping, offer lower order comparison retailing and have a more limited service role. There is scope for improvement and enhancement of these centres to strengthen the strategic distribution of floorspace in Limerick Metropolitan Area. Roxboro Shopping Centre is a poorly performing District Centre which serves a much more localised walk in catchment than its competitors, as reflected in its designation as a Tier 3(Level 2) District Centre. The designation serves to highlight the need for the centre to significantly improve.
- 5.19 At the next level to Major Town Centres in the Hinterland Area hierarchy are **Town Centres**. These serve smaller catchment areas than the Major Town Centres, have smaller populations and levels and diversity of retail floorspace. In view of their distance from the influence of the Limerick Metropolitan Area and their geographical locations within the Region, Kilrush and Roscrea are differentiated as being higher order centres in Tier 3 of the hierarchy. This headlines the need for the convenience offer in both centres to be improved with an appropriate quality and quantum of floorspace. Whilst it is equally true for the Tier 3(Level 2) Town Centres, a more modest amount is deemed appropriate.
- 5.20 **Neighbourhood Centres** within the Metropolitan Area are a mix of traditional and purpose built centres that meet a range of local needs but predominantly top up shopping. These are Tier 4 centres in the Regional Hierarchy. Their role and function in the hierarchy is important and reduces the need to travel particularly by private car for daily shopping and service needs. There may be scope for enhancement of convenience and local services floorspace within certain locations to ensure that there is a good distribution of floorspace around the City and its Environs.

- 5.21 The predominantly rural of the Region is reflected in the identification of **Small Town and Village Centres** as Tier 4 centres within the Hinterland Area. They play an important role in the lives of their communities and rural catchments. Factors that will identify and differentiate whether these are designated as Tier 4(Level 1) or Tier 4(Level 2) centres in the County Retail Strategies will include consideration of population size and potential, existing amount of retail floorspace, diversity of the centre's functions, size of catchment area, geographical location, designations in County Development Board strategies and, where appropriate, the Limerick PLUTS study. The emphasis on new floorspace will be ensuring that centres remain vital and viable and hence continue to meet the daily needs of local people. In many of these centres, as with others in higher levels of the Regional Hierarchy, tourism is important and is an important part of the retail offer. The Regional and County/City Strategies provide the policy framework and policies/objectives to ensure that this important part of the economy is sustained and encouraged.
- 5.22 At the next level down in the hierarchy within both the Metropolitan and Hinterland Areas are **Local/Corner Shops**. These on the whole are independently run/owned and meet the daily needs of local people. They may combine other functions such as Sub-Post Office or be part of petrol filling station retailing. Whilst the focus and thrust of the Regional and City/County Retail Strategies are the higher level centres in the hierarchy, they also seek to encourage and protect provision at the Local/Corner Shop level.

### **Sequential Approach**

- 5.23 In meeting the aims of the Strategy, policies and proposals in respect of the location of retail development must be in accordance with the principles set by the Sequential Approach in the RPG. The Sequential Approach in summary defines that:
- The preferred location for new retail development, where practicable and viable, is within a town centre (or district or major village centre)
  - Where it is not possible to provide the form and scale of development that is required on a site within a town centre then consideration can be given to a site on the edge of the town centre so as to encourage the possibility of one journey serving several purposes. An edge of centre site is taken to be one that is unlikely to be more than 300-400 metres from the edge of the prime shopping area, and less in smaller settlements. The distance considered to be convenient will however vary according to local circumstances.
  - Only after having assessed the size, availability, accessibility and feasibility of developing sites and premises, firstly within a town centre and secondly on the edge of a town centre, should alternative out of centre sites be considered where it can be demonstrated that

there are no town centre or edge of centre sites which are suitable, viable and available.

### **Definition of Core Retail Areas**

- 5.24 The definition of Core Retail Areas is a requirement of the RPG. It is not the role of the Regional Retail Strategy to define the boundaries of Core Retail Areas. This is a detailed aspect of the County/City Retail Strategies and development plan variations. It is important however in the Regional Retail Strategy to set out what their purpose is in order to ensure consistency of interpretation and application across the main centres in the Mid West.
- 5.25 The RPG set down the Sequential Approach as an important principle for the determination of retail applications. This has been summarised above and emphasises the importance of the priority being town centres. Therefore in order to conduct the Sequential Approach, the starting point is the definition of the Core Retail Area within centres. The emphasis is likely to be on main centres as it may not always be necessary or appropriate for Core Retail Areas to be defined for smaller centres in the hierarchy.
- 5.26 The Core Retail Area of a centre is the area that achieves the highest rentals, best yields, is highest in demand from operators, is overwhelmingly retail floorspace and has the highest footfall of shoppers. Outside of this area of the town centre, there may be other important retail areas but in view of the mix of uses that may be service related, or even residential, these are termed the secondary and tertiary retail areas of larger centres.

### **Spatial Distribution of New Retail Development**

- 5.27 The Mid West Retail Strategy, in accordance with the RPG, provides the strategic policy framework for the spatial distribution for new retail development. The emphasis is on strategic guidance on the location and scale of **major** retail development. The Strategy does not seek to inhibit small scale retail development in centres around the Region, particularly that which contributes to achieving a better mix of convenience/comparison shopping in smaller centres. It should be taken to be implicit in the aims of the Strategy that such developments should be encouraged and facilitated to enhance the sustainability, vitality and viability of smaller centres. The hierarchy however sets the framework for the spatial distribution of major strategic developments across the spectrum of retail sectors and formats identified in the RPG. In accordance with the principles of the retail hierarchy, this will be predominantly distributed to centres in the upper tiers of the Regional and County/City Retail Hierarchies. Table 5.2 is not intended to be prescriptive but provides a useful

checklist as to what types of shopping are appropriate to different levels of the hierarchy.

Table 5.2 Mid West Hierarchy – Appropriate Shopping Provision					
	High Order Comparison	Middle Order Comparison	Low Order Comparison	Superstore	Supermarket
Metropolitan Centre	■	■	■	■	■
Main Retail/ Major Town Centre (M/H)	■	■	■	■	■
District/Town Centre (M/H)			■	■	■
Neighbourhood Centre/Small Town/Village Centres (M/H)			■		■
M = Metropolitan Area; H = Hinterland Area					

5.28 Appendix A provides a glossary of the terms used in the Strategy, including the definitions of what each of those in Table 5.2 comprise. That noted, it is important to the understanding of what the table means to summarise what these terms embrace:

- i **High order comparison:** is normally sold in department stores, international and the top brand national multiples and specialist quality outlets and include luxury and designer clothes, footwear and furniture. In the Mid West given the importance of tourism to the economy, higher order comparison goods will also be sold in quality tourism related outlets across the Region’s centres. This is encouraged within the Retail Strategy but it is recognised to be unlikely that these centres are where large scale new higher order comparison floorspace will be located;
- ii **Middle order comparison:** are goods retailed in national multiples and department stores. The latter often also have a convenience component combined with white goods(electrical) and have own brand clothing and footwear as opposed to designer/high street name concessions;
- iii **Low order comparison:** will be less expensive goods and sold through national multiples and independent outlets. The latter includes hardware stores in small towns and villages. It is recognised that these may sell higher order comparison goods but that they are unlikely to be where there is major enhancement of the sales of these goods;
- iv **Superstores:** are the largest of convenience outlets which within the Mid West have a cap of 3,000m<sup>2</sup> set by the RPG and increasingly the larger operators seek a mix of convenience and comparison floorspace. These formats require large catchment areas and are unlikely to be located in smaller centres over the timescale of the Retail Strategy; and

- v **Supermarket:** typically, this format would be predominantly convenience floorspace of between 500 – 1,200m<sup>2</sup> depending on the size and nature of the centre and its location – it would serve a smaller catchment than a superstore and stock a more limited product and brand range.
- 5.29 The RPG recognise that not all retail formats and needs can be met within town centres. In addition, the health checks and analysis of the main centres indicate that there are constraints on the level of floorspace that there is expenditure potential for to be accommodated in or around the Core Retail Areas of the main centres. It is important that the Regional Strategy addresses this at a strategic and spatial level and provides guidance on the factors that should be considered.
- 5.30 **Town Centre Development:** it is a key aim of the Strategy to focus new retail development in the main town centres. These however often present the most acute challenges in terms of land acquisition, design, securing the necessary authorisations, construction, fitting out and lettings. This has been recognised in the Members Consultation Seminar and in discussions with Council Officers. At present, without exception, the Region's key centres do not have the locations and sites to accommodate the major potential retail floorspace identified in the capacity exercise. The town centres, including Limerick City Centre, are too small to meet the demands and needs of their populations and catchment areas. For change to be realised and the hearts of main centres enabled to expand, local planning authorities in the Mid West need to start addressing this issue now whilst in parallel pursuing alternative edge of centre and out of centre locations. Unless schemes are in the pipeline now then it is unlikely that they will be trading by 2006. It is thus appropriate to take account of expenditure capacity for the whole of the Strategy's lifespan when considering the scope for new development. Additionally, because of the emphasis on town centres, their redevelopment and expansion should be encouraged by offering flexibility in the application of floorspace limits.
- 5.31 **Retail Parks:** in formulating specific policies and proposals, it is recognised that in general retail warehouses do not fit easily into town centres given their size requirements and the need for good car parking facilities and ease of servicing. As such, it is accepted that often the best location is either edge of centre and out of centre sites with the grouping of retail warehousing in retail parks. This is considered to be the most sustainable development solution by facilitating and encouraging multi-purpose trips. In some instances, in the interest of minimising the adverse impact on town centres, the RPG acknowledge the benefits of restricting the range of goods sold to *'truly bulky household goods or goods generally sold in bulk'*. This does not preclude the possibility of co-location with a supermarket or superstore, provided that the chosen site is well served by public transport. The distribution of retail warehousing is not evenly spread around the Mid West. Set against the fact that it accounts for some 15% of comparison expenditure, then this is a reasonable planning target when considering locations for new development to overcome the issues of local under provision and accessibility to bulky goods floorspace.

5.32 **Innovative Forms of Retailing:** increasingly, we are witnessing the new retail trends and formats that are part of retail choice in the remainder of Europe moving into the Irish market. This Strategy, and those of the counties and City, should be forward looking in the interests of fostering choice, competition or innovation. At present, the household and shopper surveys indicate that the Region is relatively self contained although from other evidence and analysis it is clear that the inflows are significant and rising. The retail sector is dynamic and competitive. Over the period of the Strategy, there will be major improvements in the national motorway network and other transportation infrastructure. This will make it easier for the Region's residents to shop in other centres and visitors/tourists will have more convenient access to choice, particularly in respect of cities and main towns in competing regions. Subject to due consideration of the RPG, the Mid West must therefore ensure that it not only sustains but improves its competitive position relative to other regions specifically those outside the Dublin area. This should be by:

- Providing the policy framework and sites to open the door to innovative forms of retailing
- Endorsing a commitment to proactively pursuing establishing the Region as the leading location for new forms of retailing.

5.33 **New Areas of Population Growth:** are important considerations in determining an integrated strategic framework for retail planning in the Mid West. This is recognised by the RPG which state that:

*'Development plans will identify the need for new district centres or extensions of existing centres. Normally, the provision of additional centres will be based on major growth in population or a clear proven level of underprovision.'*

5.34 There is therefore the need to ensure that local needs, primarily convenience shopping and local services, are met in an efficient, equitable and sustainable way in major existing or new residential areas in and around main settlements through the designation of locations for District or Neighbourhood Centres in development plans. This principle requires to be taken forward in the detailed County/City Retail Strategies and development plan variations.

## **PRINCIPLES**

5.35 It has been noted that, with the Limerick PLUTS, the Regional Retail Strategy is a major step towards achieving an integrated strategic land use planning framework for the Mid West Region. For the first time in respect of retail planning, there are national policy guidelines and the detailed baseline information to enable the development of Regional and County/City Retail Strategies that respond to the issues and potential of the period to 2011 and beyond. To achieve this at a regional level

without an established framework of Strategic Planning Guidelines is a challenge and one not embraced by any other region in the country. It is therefore a positive first step that the local authorities in the Region have committed to the preparation of this Strategy. It must be taken as an initial framework that through monitoring and review will in the period to 2011 become more refined and responsive as information is enhanced and its influence becomes more apparent. Importantly, there is the benefit of substantial scope for new retail development in view of the significant levels of expenditure available that enables flexibility rather than constraint in respect of the ambitions of the different partners to the Strategy. From experience, market interest and demand will largely follow the principles of the Regional Retail Hierarchy and hence the proposed integrated strategic framework for retail planning is realistic and deliverable. Set against this context, there are however some general principles that underpin the thrust of the Strategy and the component County/City Retail Strategies that require to be rehearsed. These are summarised under the following headings:

- i Market share and trade draw;
- ii Transportation infrastructure;
- iii The Limerick Metropolitan Area;
- iv Achieving the right balance; and
- v Importance of flexibility.

### **Market Share and Trade Draw**

- 5.36 The household and shopper surveys commissioned as part of the baseline for the Regional and County/City Retail Strategies provide the best information on shopping patterns in the Mid West to date. However, the timing of the surveys has been acknowledged as not being wholly representative of the attraction of the Region and its centres in terms of trade draw in particular. We have been able to substantiate this by detailed analysis of the levels of turnover required to sustain existing floorspace in different locations. As the starting point, it is assumed that the net share of expenditure available across the different local authority areas will remain constant based on current patterns over the timescale of the Strategy. Clearly, this does not reflect the objectives that will come through in the individual County/City Retail Strategies where the emphasis will be on redressing expenditure outflows/leakage. These are objectives supported by this Strategy and is a sustainable aim insofar as it will reduce the demand for travel. However, as all of the local authorities in the Region will seek to do this then the only assumption at this stage is that the baseline position will remain constant – future monitoring and review will enable refinement.

## Transportation Infrastructure

- 5.37 The Region and its centres have their potential for development, and in particular retail development, on the whole constrained by roads and public transportation issues. Some centres fare better than others due the benefits of investment. In the higher levels of the hierarchy, we would highlight Shannon, Nenagh and Roscrea within this category although the latter two of these centres still experience significant congestion at peak periods of the day. Shannon being essentially a New Town was provided with a road network designed well above other centres. This, when combined with its under performance as both a town and key retail centre, makes Shannon one of the few centres in the Region with capacity in its road network for significant levels of new retail floorspace. In contrast, the delay in the implementation of the Ennis bypass could be a serious blow to the future expansion and attraction of this vibrant centre for the foreseeable future unless issues can be addressed by traffic management measures.
- 5.38 Traffic issues and impacts have been critical in the determination of retail applications around the country whether these be in respect of town centre, edge of centre or out of centre locations. Implementation of the strategic proposals in the National Development Plan, and at a regional level from the Limerick PLUTS, should serve to resolve the issues. However, it is unlikely that within the timescale of the Strategy the necessary roads and public transport infrastructure will be in place to accommodate the increased traffic flows and demand that will stem from delivery of the level of additional retail floorspace the capacity assessment indicates, apart from in a few locations. Creative engineering solutions, combined with traffic management and public transport initiatives, will be partially able to address the issues. They will not however be able to wholly facilitate the retail potential of the Mid West and its main centres being delivered but nevertheless must be given priority.

## The Limerick Metropolitan Area

- 5.39 The **Limerick Metropolitan Area** comprises Limerick City and Environs and includes parts of Counties Limerick and Clare. It requires to be considered as an integrated retail planning unit within the Regional and County/City Retail Strategies. Limerick City Centre is the only national Tier 2 retail centre within the Mid West. As with other regional capitals, not all of the floorspace required to meet the needs of residents in the City or the Region have been or can be met within the City Centre. The summary capacity assessments set against consideration of key factors and issues reveal a number of critical points:
- The City Centre is constrained in its potential to achieve the aims of this Strategy without a major expansion of its retail heart and roads and public transport issues being resolved.

- Delivery of expansion of the City Centre is achievable through renewal and regeneration of areas adjacent or close to the Core Retail Area but this will take time and is recognised by the City Council.
- Many of the retail needs of the Metropolitan Area and the wider area are met in edge of centre and out of centre locations. This is a common feature of conurbations serving wider hinterlands and does not detract from the attraction and strength of city centres as long as the retail offer, ambience and general environment are invested in. They serve a different role and function to purpose built shopping centres. This has been the case in Limerick City Centre which has experienced significant improvement in recent years and is set to continue to do so through the commitment to invest in the fabric and environment of the City Centre.
- For the City as a whole to sustain its importance, given that expansion of the heart of the City Centre must be seen as a longer term objective of the Strategy, then improvement and enhancement of existing suburban shopping centres plus the development of new retail areas must be part of the Regional Strategy. This has to be promoted on a strategic spatial level addressing the needs in the north, south, east and west of the Metropolitan Area.
- It is recognised that this was not achievable following the 1997 Retail Study. The outputs of that study however had no statutory basis. The Regional Strategy requires to be translated under the Planning and Development Act 2000 and the Ministerial guidelines set by the RPG into County/City Retail Strategies and development plan variations. Through these means, there will be a statutory basis for retail planning in the Region. In addition, a Memorandum of Agreement has been signed by the four local authorities under which they agree to adopt and be bound by the principles of the Mid West Regional Retail Strategy. This will provide the mechanism for assuring that the integrated retail planning framework set by the Strategy is incorporated in the County and City Strategies and development plan variations.
- The significant capacity for further retail development and the issues facing both the City Centre and existing and new retail locations within the suburbs means that there is greater flexibility for the economic and planning objectives of Limerick City and Limerick and Clare County Councils being met without compromise in respect of retail development.
- As the Regional Capital, the City and its wider Metropolitan Area, must be the focus for fostering choice, competition and innovation in view of the critical mass and attraction of existing floorspace. By adopting this strategic approach there is the real opportunity to build

on this, look beyond and proactively pursue fast forwarding the introduction of new retail trends and formats that will significantly differentiate Limerick from its competitors. This Strategy provides the policy framework to achieve this across the Limerick Metropolitan Area.

### **Achieving the Right Balance**

- 5.40 Given the constraints to bringing forward town centre sites and expansion in the main centres, there is pressure for edge of centre and out of centre development. This will continue to be a characteristic of retail planning and will not disappear when sites and areas are brought forward in town centres. The County/City Retail Strategies should address the facts and ensure that the mechanisms for achieving the right balance between meeting needs and sustaining vital town centres are put in place. Such mechanisms include:
- i Where new retail proposals represent an extension of a town centre, they should be considered as such with emphasis on linkage and ensuring displacement of activity is avoided as far as is practicable. This is best achieved through an integrated masterplan or vision for town centres;
  - ii It has been noted that on the whole edge and out of centre developments provide a different type of choice and shopping experience than traditional town and city centres. There is however concern from town centre businesses that they threaten the viability and vitality of town centres. This can be the case if attention is not given to ensuring that there is a counterbalance of investment in the environment, urban fabric, traffic management and car parking and this is not something that is only the responsibility of local authorities. The retail and visitor markets are competitive and all centres require to take steps to sustain their competitiveness and attraction. This has to be achieved through partnership and action between the public, private and voluntary sectors building on the experience and success of the Tidy Towns initiative; and
  - iii The majority of towns and villages have developed over time and as a consequence have attractive and important historic centres. There are examples of where modern intrusions have failed to respect the importance of their setting and context. Additionally, many of the older edge and out of centre shopping centres have not the quality of design that would be expected today. For **all** new retail development no matter the scale, it must be an objective to ensure quality and innovation in design are part of the process of sustaining the competitiveness and attraction of the Region's town, village and freestanding shopping centres.

### **Importance of Flexibility**

- 5.41 It has been emphasised that it is not the purpose of the Regional Retail Strategy to be prescriptive but rather to set out strategic principles and objectives to guide the efficient, equitable and sustainable distribution of new floorspace over the period of the Strategy. Broad assessments of the requirement for additional floorspace are provided at the local authority administrative area to inform the development plan process. This is for practical purposes. It however should be recognised that shopping developments are planned for catchment areas that will cross local authority boundaries. Retail applications and supporting Retail Impact Assessments(RIA) will be founded on this principle. Direct application of the indicative floorspace limits set for the County/City Retail Strategies will not reflect the realities of the retail market but they should inform assessment of individual developments. It is for this purpose that the RPG require specific assessment criteria for retail developments to be set down in retail strategies.
- 5.42 The capacity exercise illustrates that there is an enormous amount of additional new floorspace that could be developed across the Mid West. In some instances, due to market interest and the fact that proposals are at an advanced stage, then development and trading may be achievable before 2006. As the pen portraits of the key facts in respect of the County/City Strategies illustrate, there are a mix of constraints within different centres that are likely to delay development. It is important that this position is monitored and that expenditure/capacity potential is redistributed around the other main centres in the Region to ensure that the potential is retained within the Mid West as a whole. Redistribution will be in the interests of the Mid West's retail competitiveness and attraction. There will require to be a strong set of control factors if redistribution of potential is to be consistent with the aims of the Regional Retail Strategy. These controls will be the Strategy's strategic principles including the retention of expenditure, the retail hierarchy, roads and public transport infrastructure and the scope for innovation.

### **COUNTY/CITY STRATEGIES**

- 5.43 The translation of the principles and considerations summarised above are outlined for the different strategic planning units in the paragraphs that follow. Detailed application of these and the floorspace capacity estimates are provided in each of the County/City Retail Strategies.

### **Limerick Metropolitan Area**

- 5.44 The Limerick Metropolitan Area dominates retailing in the Region accounting for 56% of total floorspace. Reflecting the quality and choice of offer across each market

sector, the area retains high levels of resident spend at 89% and 84% for convenience and comparison respectively. It is also a high importer of spend which reflects its role and importance in the national and Regional retail hierarchies. As would be expected, there is a higher inflow of comparison than convenience spend with trade draws of 65% and 50% respectively.

- 5.45 As means of understanding the figures and their importance, it is helpful to put them in the context of Dublin City Centre and the remainder of its administrative area given that it is the only centre higher than Limerick in the national hierarchy. The Dublin City area has no outflow of convenience expenditure but a lower inflow than the Limerick Metropolitan Area at 13%. This reflects the quality and quantum of convenience floorspace in and around Limerick City, the incidence of linked trips and to a degree the poorer offer in neighbouring counties including the remainder of Limerick County. In terms of comparison expenditure, Dublin has an outflow of 9% against the 16% from the Metropolitan Area. The latter is still low and simply bears witness to the fact that people do like to visit other centres for comparison shopping. The greatest difference is found between the comparison spend trade draw figures. Dublin imports 107% of comparison expenditure compared to 65% for the Metropolitan Area. This difference will be a function of the national role and attraction of Dublin City Centre in the nation's shopping but it does serve to indicate that whilst Limerick City Centre and the offer in its Environs has significantly improved there is scope to further improve performance.
- 5.46 Table 5.3 indicates the significant scale of new retail development that there is capacity for over the timescale of the Strategy. It presents the revised capacity estimates that stem from review of the preliminary results of the 2002 Census and the forecasts in recently published NSS. The potential is in addition to the 9,775m<sup>2</sup>(gross)/circa 8,800m<sup>2</sup>(net) retail warehouse park currently under construction opposite the Parkway Shopping Centre. In respect of the County's overall share of additional floorspace, the figures are derived from market share and trade draw analysis and review of turnover figures. The Metropolitan Area's share is approximately 64% of all new retail floorspace under the high scenario and some 58% and nearly 77% of convenience and comparison floorspace respectively. To put this in context, currently there is some 147,355m<sup>2</sup>(net) of retail floorspace in the Limerick Metropolitan Area. There is potential for this to increase by just over two thirds in the timescale of the Retail Strategy under the high scenario. The quantum involved and the timescales should not raise concerns. Essentially, there is sufficient available to well protect and promote Limerick City and enable a more equitable distribution in the suburbs.

Period	Convenience		Comparison		Total
	Low	High	Low	High	Low –High
2002-2006	7,100	8,400	31,300	35,600	<b>38,400 – 44,000</b>
2007-2011	8,300	10,200	35,000	41,000	<b>43,300 – 51,200</b>
<b>Total</b>	<b>15,400</b>	<b>18,600</b>	<b>66,300</b>	<b>76,600</b>	<b>81,700 – 95,200</b>

- 5.47 Although the priority should be the City Centre, from review of sites and potential, it is clear that there are not readily deliverable major opportunities in or on the immediate edge of the City Centre, although we understand that there are City Centre proposals emerging that will greatly add to its offer. The proposals will be a mix of both new and replacement retail floorspace and thus will not greatly take up estimated capacity potential for additional retail floorspace. Overall, however, because of the nature of the buildings around O'Connell Street and their conservation/heritage importance, then for enhancement of retail floorspace to be achieved there will need to be a substantial outward expansion of the City Centre's retail/commercial heart to less sensitive areas that would benefit from renewal and regeneration. Sites and areas will need to be assembled and this will take time and money. It will also require considerable commitment from the City Council. This is recognised by the Council and one area of potential could be the City's Docklands which stretches west from the edge of the City Centre to the City's boundaries. Currently, it is the focus of a major study/initiative being commissioned by the Council, with other key public agencies. Whilst the objectives of this study are more broad based than the Retail Strategy, it will provide the mechanism to examine in detail the options and opportunities for the City Centre's expansion. Realistically from a standing start, it will be the second half of the Strategy from 2007 onwards before any major development within this area or others around the heart of the City Centre is underway and trading. The nature of any new retail floorspace should be predominantly comparison and higher order comparison if the offer is to remain competitive and attractive to residents and visitors/tourists alike.
- 5.48 In the period to 2006 and early post 2007, the majority of new retail floorspace will thus require to be located in the City's Environs if the Metropolitan Area's role and importance is to be sustained. This is where most of the new convenience floorspace should be located but additionally there will be a need to continue to expand and improve the comparison offer. Based on expenditure trends and patterns, some 15% of available capacity for new retail parks/warehousing would be appropriate but not necessarily a set planning target. Given the pressures for development that are in the pipeline and can be anticipated, it is important that a strategic approach to determining the location of new floorspace is jointly adopted by the City and Limerick and Clare County Councils. This will require the involvement of North Tipperary County Council given the influence and implications of any large scale development in the Metropolitan Area on the County's shopping patterns. The need for the local authorities to work jointly on this specific aspect of the Strategy is set down in the

Memorandum of Agreement for the Mid West Regional Retail Strategy and is a legally binding agreement.

- 5.49 In agreeing a strategic approach, key influences should be a establishing a sustainable spatial distribution of major new floorspace well linked to existing and expanding residential areas and the road network to enable good access by foot, cycle and public and private transport. Where possible, priority should be given to enhancing the offer and diversity of existing shopping centres. It should be an objective to better integrate these and new centres with surrounding land uses and combine them with other uses, such as community facilities and services, in the interests of encouraging linked multi-purpose trips.
- 5.50 The City and Metropolitan Area's attraction is of course not solely related to shopping and should not be. It is the whole package of higher order and speciality shopping, the ambience of the environment, heritage, urban form and waterfront setting/opportunities, the City's history and its interpretation, cultural and social venues/centres and its attraction for meeting, eating and greeting. This is already well recognised by the City Council and is being acted on by a suite of initiatives. These include the establishment of a dedicated City Centre Co-ordination Team, the major programme of environmental and traffic management improvements and the proposed cultural and arts centre on the waterfront adjacent to Arthurs Quay. It is important that this progress and commitment is continued.

### **Remainder of Limerick County – the Hinterland Area**

- 5.51 Based on the preliminary results of the 2002 Census Limerick County, including the City, has nearly 52% of the Mid West's population. Population increase has been higher than that forecast in the County housing strategy, particularly within the County parts of the Limerick Metropolitan Area and in the majority of centres that lie close to it. At 1996, which are the current adopted Census figures, nearly 52% lived outside the Limerick Metropolitan Area. It is anticipated that this figure will have greatly decreased given that the population in the Limerick Metropolitan Area is estimated to have increased by some 55% between 1996 – 2002 and only a small part of this was attributable to the City Council's administrative area. Given that largest centre in the Hinterland Area is Newcastlewest and Environs with a population of 3,618 at 1996 then the extremely rural nature of the County and its dispersed population can be appreciated. This is evidenced in the very high retention of both convenience and comparison spend at 94% and 93% respectively. Trade draw is strong and healthy, when compared to equivalent hinterland/rural counties around Dublin at 30% for convenience spend and 45% for comparison. The equivalents in the GDA on average for both sectors are under 10%. Much of the inflows can be attributed to tourism and the attraction of centres such as Newcastlewest and Adare, both of which have experienced population growth since 1996.

- 5.52 From the preliminary results of the 2002 Census, there is evidence of a growing urbanisation of the towns and villages in the Hinterland Area, particularly those close to the Metropolitan Area. This reflects the greater propensity for commuting around the country's major conurbations that has occurred since 1996. This, and the retention and outflows of spend, has been taken into account in the capacity assessment set out in Table 5.4.

Period	Convenience		Comparison		Total
	Low	High	Low	High	Low –High
2002-2006	700	1,200	6,800	7,900	<b>7,500 – 9,100</b>
2007-2011	1,300	1,900	4,100	5,000	<b>5,400 – 6,900</b>
<b>Total</b>	<b>2,000</b>	<b>3,100</b>	<b>10,900</b>	<b>12,900</b>	<b>12,900 – 16,000</b>

- 5.53 The potential of the Hinterland Area is significant given the relatively limited offer that currently exists. To put it in context, Newcastlewest is the largest and strongest centre and at present has a total retail floorspace of 11,822m<sup>2</sup> which is predominantly comparison. Taking the high scenario, there is sufficient capacity for Newcastlewest's convenience and comparison floorspace to double and treble respectively over less than eight years(to 2011). This is only provided as an illustration as the additional new floorspace will of course be distributed in Newcastlewest and other centres. It is important to reiterate that this only relates to large scale retail proposals and not those of a smaller scale that typically characterise the smaller centres in the Hinterland Area. This is an important factor.
- 5.54 In times of declining rural centres and areas, the Regional Strategy has set the policy framework to redress this and the key is the designations and importance accorded to centres in the Regional Retail Hierarchy. This should dictate where the quantum of new floorspace is located and, whilst it cannot stem the decline of smaller centres, it provides the framework for the strengthening of main centres.
- 5.55 In recognition of its very important regional role in the hierarchy, Newcastlewest is designated as a Tier 2(Level 2) Major Town Centre. It is accepted that it is not performing at the same level as other centres with the same designation in the Regional Retail Hierarchy. Given the changes in settlement patterns and trends, it is unlikely that Newcastlewest will evolve into a retail centre of the size, status and importance in the Region as Nenagh and Thurles. This does not diminish the importance of securing the right designation to promote a more efficient, equitable and sustainable distribution of new floorspace around the Mid West. At the next level in the hierarchy, Abbeyfeale fulfils a similar role but at a more localised level. In addition, the Level 4 centres in the County's Hinterland Area perform an important role in meeting the needs of local people and their immediate but often extensive catchments. Within this level of the hierarchy are the expanding small towns and villages that sit close to the Limerick Metropolitan Area. These have different issues

to the more rural areas of the County that require to be addressed. This is primarily the expansion of not only their retail offer but also other services in order that they become more self sustaining communities with a reduced reliance on the Limerick Metropolitan Area, particularly in respect of convenience floorspace

- 5.56 There is therefore a need to strengthen the quality and quantum of convenience floorspace in the main and expanding centres in the County's Hinterland Area. Newcastlewest as the main town in the Hinterland Area must be an important priority over the period to 2006 and in fact beyond. This is equally true in respect of comparison floorspace, acknowledging that development plan zonings alone cannot achieve the objectives of this Strategy unless potential is proactively pursued by the County Council, local business organisations and community groups. Without this type of approach then success or failure will be determined by the market. There is however a parallel need to ensure that the potential of the Level 3 and Level 4 centres is enhanced but this will be primarily market driven. Interest is likely to emerge in the expanding centres close to the Limerick Metropolitan Area. To meet the convenience needs of these growing centres in a more sustainable way, the broad assessment of the capacity for additional floorspace should not be taken as a cap across the Hinterland Area as other factors will require to be taken into account. Developments will require to be judged on their merits and against the criteria for assessing major retail developments.

### **Clare**

- 5.57 Clare has of the order of 30% of the Region's population, based on the preliminary results of the 2002 Census. This is similar to its share at 1996, noting that the County's population increased at a rate above the Regional average. It has just over 18% of the Mid West's retail floorspace with nearly 75% of this located in and around Ennis. The other key centres are Shannon in the south of the County and Kilrush in the south west. Both Ennis and Shannon are close to the Limerick Metropolitan Area which partially explains why the County has lower retention rates at 79% and 58% for convenience and comparison expenditure respectively than the Hinterland Area of County Limerick and North Tipperary. Proximity can only be taken as one factor in the equation, range and quality should also be considered. The County is achieving trade draws of 10% for convenience and 25% for comparison expenditure. The latter is primarily due to the strength and attraction of Ennis but the relative geographical isolation of Kilrush and its important sub regional role is a contributory factor in the figures. It has been acknowledged that Shannon is a poor centre relative to its population size and potential and as such residents travel to meet their shopping needs and few visit from outside of the town.
- 5.58 Informed by the market share and trade draw assessments, the forecasts set out in Table 5.5 indicate that there will be expenditure capacity in the County for total floorspace to increase by of the order of nearly 58% by 2011. This would be a

significant increase which importantly would address the County’s apparent underperformance in retaining spend.

<b>Table 5.5</b>					
<b>Indicative Net Floorspace Capacity – Clare(m<sup>2</sup>)</b>					
<b>Period</b>	<b>Convenience</b>		<b>Comparison</b>		<b>Total</b>
	<b>Low</b>	<b>High</b>	<b>Low</b>	<b>High</b>	<b>Low –High</b>
2002-2006	2,400	3,000	6,700	8,000	<b>9,100 – 11,000</b>
2007-2011	3,700	4,600	10,200	12,000	<b>13,900 – 16,600</b>
<b>Total</b>	<b>6,100</b>	<b>7,600</b>	<b>16,900</b>	<b>20,000</b>	<b>23,000 – 27,600</b>

- 5.59 In terms of the distribution of new large scale retail floorspace, the focus should be on the two Tier 2 centres in the Regional Retail Hierarchy, namely Ennis and Shannon. This should not inhibit further retail development in Kiltrush or lower order centres that is appropriate to where these centres sit in the Regional and County Retail Hierarchies.
- 5.60 The historic town of Ennis will have difficulty in achieving expansion of its retail offer prior to 2006 apart from limited sensitive infill development. Relocations and regeneration of edge of centre sites in the convenience sector will provide the opportunity for significantly enhancing the town’s convenience offer and in parallel creating the space for in town expansion of its comparison offer. The convenience offer is poor for a town of this size and importance. In respect of comparison floorspace, space needs to be created/land assembled to enable the town to expand national and international multiple representation – the floorspace footprints to meet actual and latent demand are not available. Provision of these opportunities will help stem the trend of local people driving down the N18 to the shopping offer of the Limerick Metropolitan Area and hence improve the County’s expenditure retention rates. Nationally, Ennis is a key visitor destination of comparable quality and attraction to Kilkenny. The comparator is however performing better as it has achieved a better balance between the highly attractive specialist quality outlets and national and international comparison multiples that meet the needs of local people and visitors/tourists alike. The major issue that inhibits Ennis achieving its potential is the delay of the town’s bypass in view of the major traffic congestion that persists and how major retail development can be delivered within this context. This is more than well recognised .by the County and Town Councils and the Regional and County Retail Strategies should provide further fuel to accelerate prioritisation of the bypass in the Government’s spending programme. Weight is added to this by the town being accorded priority in its designation as a hub in the NSS.
- 5.61 Shannon has the scope and potential to secure a major expansion of the town centre within the early years of the Strategy. It needs to grow into the role that it should be performing and this Strategy provides the strategic policy framework to enable this. Importantly, the land and potential local/wider demand are there. It could take up the majority of the expenditure capacity in the period to 2006 and the immediate years

thereafter. Achieving this must be a priority of the Regional and County Retail Strategies. There are however inherent issues, apart from proximity to either the Limerick Metropolitan Area and the more attractive higher order centre of Ennis, that require to be addressed. Shannon Town Centre is a closed heart to a large town in the Region and as such replicates the issues found in the New Towns in the UK. It lacks the size and critical mass of successful freestanding shopping centres such as Blanchardstown and Liffey Valley in the neighbouring counties to Dublin. Whilst size and critical mass are important there are further lessons to be learnt from both the Irish and UK comparators. Essentially, these are putting the mechanisms in place to secure greater integration with other parts of traditional town centre activity and community life which are the important ingredients in the maturing and success of purpose built centres. Positively, there is active market interest in significantly expanding and improving the town centre. It is important this is harnessed but that the framework is set down at both a strategic and detailed level by the local planning authority. Additionally, further profile and potential has been introduced by the town's designation in the NSS as the Limerick /Shannon gateway.

- 5.62 Clare is a predominantly rural County with much of its population living at distance from the main centres in the Region's retail hierarchy. Improvement in road and public transport infrastructure over the period of the Regional and County Retail Strategies will reduce this but are unlikely to significantly overcome the inherent issues. It is therefore important that, through the Mid West and County Retail Strategies, the policy framework is put in place to encourage retail development and enhancement across the County which is in accord with the settlement hierarchy set down in the County Development Board's Integrated Strategy for social, economic and cultural development. This strategy recognises the potential and issues that face the County and the need to strengthen the role of key geographically located centres as the focus of economic activity within the more peripheral parts of Clare. The Regional Retail Strategy's designation of Ennistymon, Killaloe/Ballina and Scarriff as Tier 3(Level 2) centres in the retail hierarchy reinforces the foundations provided by the County Development Board's strategy. Whilst these may not be the centres where significant levels of additional retail floorspace will be located, the principles and policies at the Regional and County levels provide the opportunity for potential to be harnessed.

### **North Tipperary**

- 5.63 North Tipperary is the smallest county in the Region reflected in its population size and quantum of retail floorspace. These respectively are approximately 18% and 22% of the Mid West's totals. In terms of population, the County is maintaining its proportions, based on the preliminary results of the 2002 Census, albeit that this is below rather than above the 1996 figure. The County is different to the other counties in that it has a better balance of sizeable centres and these, whilst closely linked/dominated by the Limerick Metropolitan Area, are more self sufficient than the main key centres in Clare. This is reflected in the market share and trade draw

assessments. The County retains some 88% and 70% of its convenience and comparison expenditure respectively. Its trade draw is lower than the Limerick County Hinterland Area for both convenience(13%) and comparison(19%) expenditure. It is higher than that for Clare in respect of convenience trade draw but lower in terms of comparison expenditure reflecting the greater tourism profile of North Tipperary’s neighbour.

- 5.64 The capacity assessment reaffirms that there is substantial scope for major new additional retail floorspace across the centres of the County as indicated by the figures set out in Table 5.6.

<b>Table 5.6</b>					
<b>Indicative Net Floorspace Capacity – North Tipperary(m<sup>2</sup>)</b>					
<b>Period</b>	<b>Convenience</b>		<b>Comparison</b>		<b>Total</b>
	<b>Low</b>	<b>High</b>	<b>Low</b>	<b>High</b>	<b>Low –High</b>
2002-2006	700	1,200	6,800	7,600	<b>7,500 – 8,800</b>
2007-2011	2,100	2,700	5,900	6,900	<b>8,000 – 9,600</b>
<b>Total</b>	<b>2,800</b>	<b>3,900</b>	<b>12,700</b>	<b>14,500</b>	<b>15,500 – 18,400</b>

- 5.65 The table indicates that in there is potential for the County’s floorspace to increase by the order of some 32% over the timescale of the Retail Strategy, excluding developments that already have full planning permission.. To put this in context, it is a greater quantum of retail floorspace than currently exists in Nenagh which is the second largest retail centre in the County.
- 5.66 The priority must be sustaining and diversifying the offer of the key centres in the hierarchy, with priority given to Nenagh and Thurles as both are acknowledged as serving specific geographical areas of the County. There should be particular emphasis on comparison floorspace. When retail catchment areas are fed into the equation, as opposed to the capacity derived for the County, there is likely to be scope for a superstore in Nenagh, Roscrea and Thurles and a more modest supermarket in Templemore. The potential for additional comparison floorspace, given the quantum of the potential that is available, could equally be distributed on this basis.
- 5.67 All of the key centres face issues in respect of delivering sites and areas of the appropriate size and location in their town centres before 2006. The potential is there in the longer term provided that there is a commitment to assembly of the sites/lands that sit behind the core retail areas in each of these main centres. In the interim, it would be appropriate to identify edge and out of centre sites in Nenagh and Thurles to meet needs in the earlier years of the Strategy. Our assessment indicates that this is unlikely to be necessary for Roscrea given the potential of the centre and market interest in new development. The County Retail Strategy examines these facts and issues in greater detail and informs the choices that require to be made.

- 5.68 In contrast with its larger neighbours, the main centres in the County do not register in the same league as visitor/tourist destinations. The N7 may have contributed to this in respect of Nenagh and Roscrea by bypassing these centres with Thurles being less accessible historically. The choice has to be made in respect of whether to 2011 and beyond these centres expand and consolidate their roles and functions as primarily meeting sub-county level needs or whether they seek to enhance their role and profile. As has been highlighted the strength and attraction of centres does not only rest in their retail offer. North Tipperary benefits from very fine historic towns that are not maximising their potential as visitor/tourist destinations which is an important part of the shopping package. Consideration is required on how this is best addressed, whether it should be and how.

#### **FRAMEWORK FOR THE ASSESSMENT OF RETAIL DEVELOPMENTS**

- 5.69 All applications for significant retail development should be assessed against a range of criteria. What is significant will vary between the Metropolitan and Hinterland Areas of the Region and thus different thresholds require to be set. For the Limerick Metropolitan Area, it is recommended to be 1,000m<sup>2</sup> (gross) for convenience and 2,000m<sup>2</sup> (gross) for comparison retail developments. In the wider Region, the Hinterland Area, it is recommended to be 500m<sup>2</sup> (gross) for convenience and 1,000 m<sup>2</sup>(gross) for comparison developments. The criteria to be considered in the assessment of significant applications will include:
- i. Testing the proposal against the sequential approach and that other options have been considered;
  - ii. The impact on town and village centres, including cumulative impact;
  - iii. The baseline information and capacity/impact assessment is fit for purpose and transparent;
  - iv. There is demonstrable need for development;
  - v. The relationship of the application to any development plan allocation;
  - vi. Its contribution to town/village/centre improvement;
  - vii. Its contribution to site and/or area regeneration;
  - viii. The quality of access by all modes of transport and by foot and bicycle;
  - ix. Its role in improving the competitiveness of the Region and its sub-areas;
  - x. Its role in sustaining rural communities;

- xi. The extent to which it is relevant to consider the imposition of restrictions on the range of goods permitted for sale; and
- xii. Any other development plan allocations.

5.70 If the retail proposal, whether significant or not, accords with development plan policies and proposals or variations to the plan in all material respects it should expect to meet with approval. In accordance with the RPG, in such instances, it should not be necessary for the applicant to provide additional supporting background studies. However, the onus is on an applicant to demonstrate convincingly that the proposal does comply closely with the development plan. Where there is doubt on any aspect of a planning application local authorities should require a detailed justification related to the matter that is questionable.

#### **MONITORING AND REVIEW**

5.71 The Mid West Retail Strategy has been founded on a sound basis of research, survey analysis and published statistics. It has been prepared during one of the most dynamic periods in the retail sector, as evidenced by the market interest in major schemes at key centres in the Region. The facts and information change over time. There is a need therefore to ensure that:

- The Retail Strategy and its baseline are kept as up to date as possible
- There is a means of monitoring progress with the implementation of policies
- There is a mechanism that can enable change that is responsive to emerging trends and opportunities.

5.72 The above can be achieved by setting up a framework for regular monitoring and review. This should include:

- i Monitoring of expenditure and population forecasts, this is particularly important in the light of the results of the 2002 Census of Population and the NSS population forecasts;
- ii Floorspace data should be kept up to date through planning consent monitoring of both new retail floorspace and change of use. It could be adopted as a Development Control/Planning Office procedure;
- iii The Retail Strategy should be reviewed after 3 years; and
- iv The household and shopper survey data should be up dated every five years.



**APPENDIX A**  
**GLOSSARY OF TERMS**



### **Bulky Goods Retailing**

Goods generally sold from retail warehouses where DIY goods or goods such as flatpack furniture are of such a size that they would normally be taken away by car and not be manageable by customers travelling by foot, cycle or bus, or that large floor areas would be required to display them e.g. furniture in room sets, or not large individually, but part of a collective purchase which would be bulky e.g. wallpaper, paint.

### **Comparison Retailing**

This type of retailing includes:

- Clothing and footwear
- Furniture, furnishings and household equipment (excluding non-durable goods)
- Medical and pharmaceutical products, therapeutic appliances and equipment
- Educational and recreation equipment and accessories
- Books, newspapers and magazines
- Goods for personal care and goods not elsewhere classified

### **Convenience Retailing**

This type of retailing includes:

- Food
- Alcoholic and non-alcoholic beverages
- Tobacco
- Non-durable household goods

### **Core Retail Area**

Normally defined as the area including and immediate to the 'prime pitch'. That is the area that achieves the highest rentals, best yields, is highest in demand from operators, is overwhelmingly retail floorspace and has the highest footfall of shoppers.

### **Extant Planning Permissions**

These are planning applications that have received full planning permission and are either yet to be built or under construction, but not yet trading.

### **Floorspace**

Primarily we are interested in **net** floorspace, which is the area of a shop or store that is devoted to the sales of retail goods. This is distinguished from **gross** floorspace, which includes the sales area, plus storage space, offices, toilets, other staff facilities and circulation space.

### **Market Share**

The percentage of total retail expenditure by persons living in the study area that is spent in retail outlets located in the study area. That remaining proportion that is spent in other areas outside of the study area is often referred to as *leakage*.

**Sequential Test**

This test sets out the guiding principles for the location of new major retail schemes. In the first instance, the priority should be in locating new retail development within town centres. If town centre locations are not readily available within a reasonable and realistic timescale then edge of centre sites should be looked to i.e. sites that are within 300 – 400 metres of the core retail area. Only after the options for town centre and edge of centre are exhausted should out of centre locations and sites be considered.

**Trade Draw**

The proportion of total expenditure in retail outlets located in the study area that is due to persons living outside the study area. This is often referred to as *visitor expenditure*.