

COLLIERS CRE



RETAIL STRATEGY FOR THE MID WEST REGION

2010-2016

APPENDICES

Volume 2

APPENDICES (Volume 2)

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APPENDIX 1
Copy of Study Brief (Extract)

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

Review of Mid West Retail Strategy

1.0 Introduction

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

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

Background

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

Relevant documentary review

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

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

Brady Shipman and Martin Retail Study 1998

DTZ Mid West Retail Planning Study and Report 2003- 2011

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

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

NSS 2002

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

~~John Fitzgerald Report 2007~~

~~City Centre Strategy~~

Review of City Centre and Suburban Rents for Limerick City Council

Review Strategy

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

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

Key Issues for the Review

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

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

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

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

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

Preliminary assessments indicate that:

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

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

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

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

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

Key Outputs of the Review

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

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

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APPENDIX 2

Town Centre Health Check Proformas

Mid West Retail Strategy

Technical Appendix 2

Town Centre Assessments

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

Limerick Metropolitan Area

1. Limerick City Centre

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

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

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

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

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

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

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

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

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

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

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

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

2. Dooradoyle

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

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

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

Penny's Department Store

Shaw's Department Store

Heaton's Department Store

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

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

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

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

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

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

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

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

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

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

3. Castletroy Shopping Centre

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

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

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

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

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

Vacancies	9	38
Retail Warehousing	0	0
Total	24	100

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

4. Parkway Shopping Centre

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

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

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

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

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

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

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

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

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

5. Caherdavin

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

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

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

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

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

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

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

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

6. Roxboro Shopping Centre

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

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

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

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

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

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

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

7. Parkway Valley

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

8. Coonagh Cross

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

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

9. Limerick Out of Centre

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

i) Childers Road Retail Park

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

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

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

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

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

ii) Parkway Retail Park

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

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

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

iii) Eastway Retail Park

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

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

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

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

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

(iv) Ennis Road Retail Park

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

v) Delta Retail Park

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

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

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

vi) East Way Industrial Area

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

vii) Riverside Park

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

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

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

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

LIMERICK COUNTY COUNCIL

1. Newcastlewest

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

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

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

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

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

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

2. Abbeyfeale

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

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

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

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

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

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

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

3. Adare

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

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

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

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

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

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

4. Rathkeale

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

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

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

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

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

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

5. Kilmallock

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

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

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

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

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

CLARE COUNTY COUNCIL

1. Ennis

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

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

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

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

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

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

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

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

2. Ennis – Out of Centre

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

i) Ennis Shopping Centre

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

ii) Quinn Road Business Park

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

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

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

iii) Clonn Road Business Park

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

iv) Doora Industrial Estate

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

v) BallyMaley Retail Park

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

vi) Rosslevan Shopping Centre –

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

3. Shannon

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

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

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

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

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

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

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

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

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

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

4. Kilrush

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

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

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

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

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

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

5. Ennistymon

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

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

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

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

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

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

6. Killaloe

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

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

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

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

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

7. Kilkee

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

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

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

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

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

8. Scarriff

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

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

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

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

9. Milltown Malbay

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

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

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

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

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

10. Lahinch

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

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

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

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

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

11. Corofin

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

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

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

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

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

Proportion of retail Representation in Corofin		
Representation	Total	
	No.	%

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

12. Newmarket on Fergus

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

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

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

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

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

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

13. Sixmilebridge

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

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

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

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

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

14. Tulla

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

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

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

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

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MID WEST REGION
2010-2016

APPENDIX 3

Household Telephone Survey

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2010-2016

APPENDIX 3A
Objectives and Methodology

REVIEW OF MID WEST RETAIL STRATEGY

Quantitative Retail Floorspace Need Assessment

The Household Telephone Survey: Objectives and Methodology

Objectives of the Survey

1. The household telephone survey forms an important role in the quantitative need assessment since it provides important information on the current pattern of shopping activity throughout the Mid West and surrounding areas. As such, it forms the foundation upon which the retail floorspace need estimates are built.

2. A major aim of the survey is to generate quantitative data on consumer retail expenditure flows between areas or zones (where people live) and retail centres (where they spend their money). This has been carried out for the following three types of shopping:-
 - convenience goods;
 - non-bulky comparison goods;
 - bulky comparison goods.

Definition of the Survey Area

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

Definition of the Expenditure Zones

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

Sampling

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

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

The Survey Questionnaire

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

Survey Analysis and Results

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

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2010-2016

APPENDIX 3B

**Sample Breakdown and
Statement of Reliability**



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MID-WEST REGION RETAIL STRATEGY

HOUSEHOLD TELEPHONE SURVEY

March 2009

Presented to: Colliers CRE
9 Marylebone Lane
London
W1U 1HL

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

CONTENTS

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

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

1. BACKGROUND & METHODOLOGY

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

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

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

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

MID-WEST REGION SAMPLE BREAKDOWN

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

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

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

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

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

STATEMENT OF RELIABILITY

Assessment of the standard error: -

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

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

Where p% = sample value recorded

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

n = sample size

And where:

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

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

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

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

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

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APPENDIX 3C
Survey Questionnaire

AREA

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

Name: _____

Address: _____

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

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

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

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

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

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

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

Interviewer Signature: _____

Date: _____

Interviewer Name: _____

Good morning / afternoon, my name is

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

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

- YES 1
- NO 2 - CLOSE INTERVIEW

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

WRITE IN HERE _____

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

Q1a Can I ask you first of all, excluding Mail Order and shopping over the Internet, at which town/city centre or shopping centre or retail park do you do most of your shopping for non-food goods such as clothing & footwear, books, gifts and jewellery?

Q1b And how often do you visit..... town/city centre or shopping centre or retail park, for this type of non-food shopping?

Q1c And excluding Mail Order and shopping over the Internet, what percentage or proportion of your total expenditure on non-food shopping such as clothing & footwear, books, gifts and jewellery would you say that you do in town/city centre or shopping centre or retail park?

Q2a Excluding Mail Order and shopping over the Internet, what is your second most important town/city centre or shopping centre or retail park for non-food goods such as clothing & footwear, books, gifts and jewellery? (SINGLE CODE)

Q2b And how often do you visit..... town/city centre or shopping centre or retail park for this type of non-food shopping?

Q2c And excluding Mail Order and shopping over the Internet, what percentage or proportion of your total expenditure on non-food shopping such as clothing & footwear, books, gifts and jewellery would you say that you do in town/city centre or shopping centre or retail park?

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

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

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

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

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

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

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

Q3c Where does your journey usually start from?

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

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

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

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

ASK ALL:

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

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

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

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

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

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

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

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

Q7c Where does your journey usually start from?

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

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

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

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

ASK ALL:

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

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

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

RECORD ANSWER BELOW

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

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

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

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

Note: c is calculated as (Q10a - Q10b)

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

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

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

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

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

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

Q11d Where does your journey usually start from?

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

ASK ALL SAYING HOME AT Q11e - OTHERS GO TO Q12a

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

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

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APPENDIX 3D

Key Results

Retail Strategy for the Mid West Region

Household Telephone Survey

Key Results: Convenience Goods

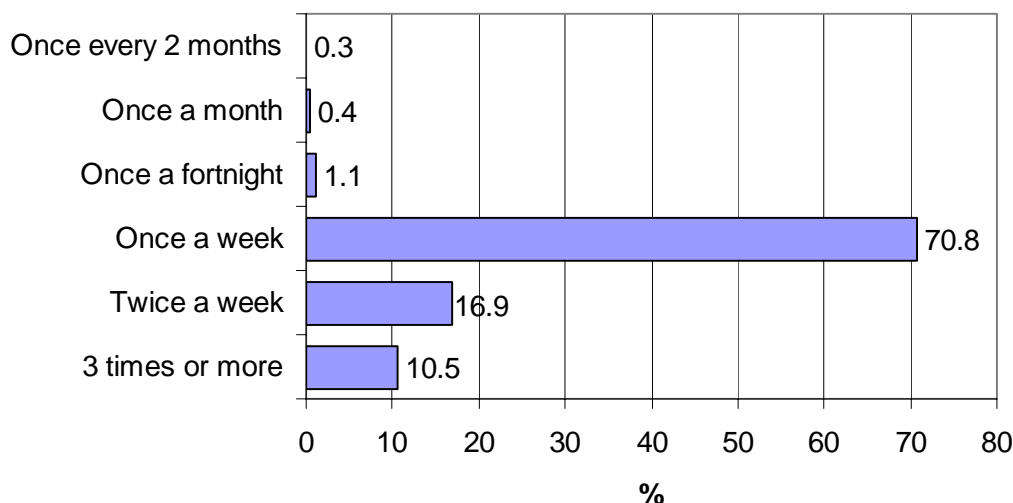
Introduction

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

Convenience Goods Shopping

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

Figure 1 - Frequency of Visits to Main Convenience Goods Store



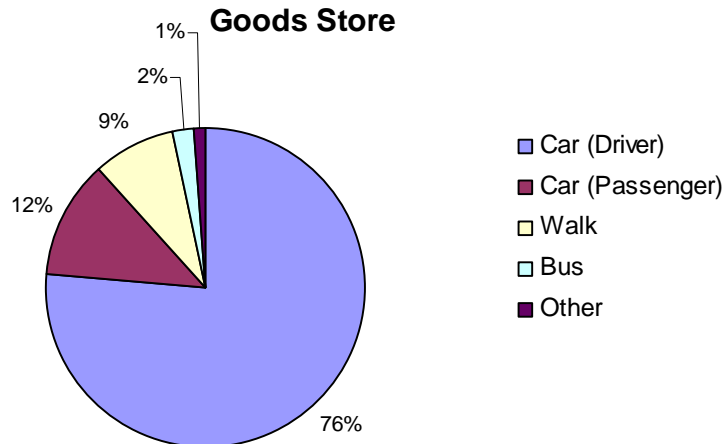
- The main reasons for choosing a main convenience goods store are set out in **Table 1**. The overwhelming majority of respondents stated that convenience and proximity to their home was the main reason for their choice (74.8%). Respondents from within Limerick City were most likely to cite this as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

Table 1 – Reason for Choosing Main Convenience Goods Store

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

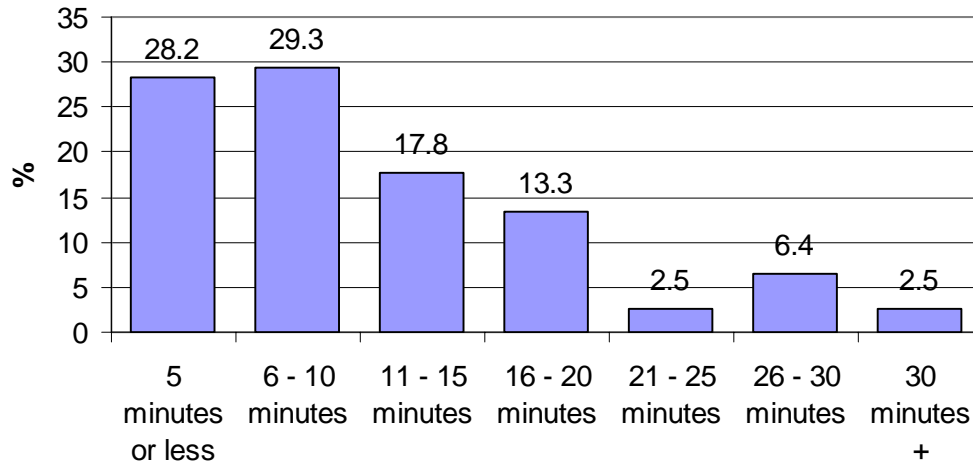
- The preferred modes of transport to main convenience goods store are summarised in **Figure 2**. Over three quarters of respondents stated that driving their own car was their preferred mode of transport (76%), with an additional 12% travelling as a car passenger and 9% of respondents walking to their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

Figure 2 - Mode of Transport to Main Convenience Goods Store



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

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



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

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

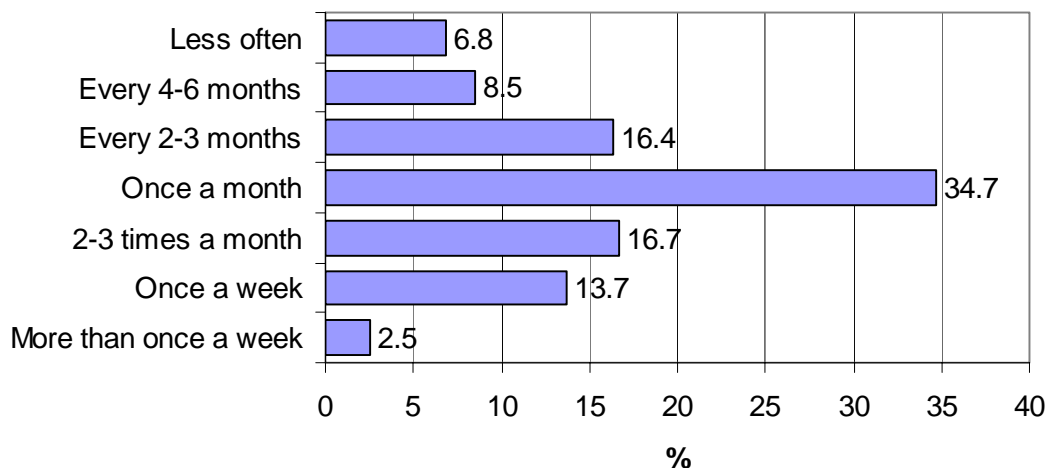
Introduction

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

Non Bulky Comparison Goods Shopping

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

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



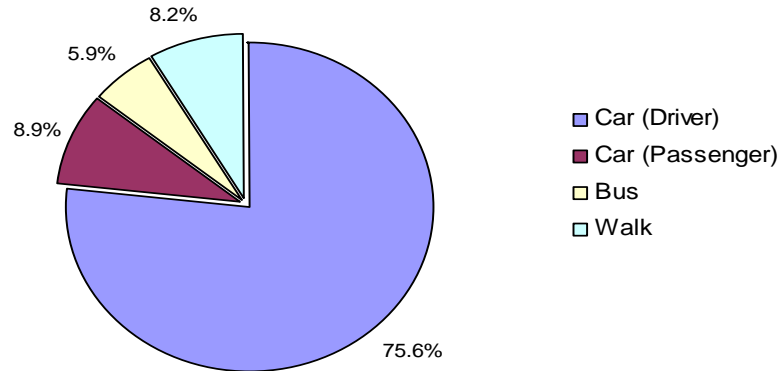
- For those respondents who cited Limerick City Centre as their main destination for non bulky comparison goods shopping, 41.5% visited once a month, whilst 20.4% visited 2 to 3 times a month. Very few respondents (0.9%) visited more than once a week.
- When respondents were asked what their main reasons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

Table 1 – Reason for Choosing Non Bulky Comparison Goods Centre

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

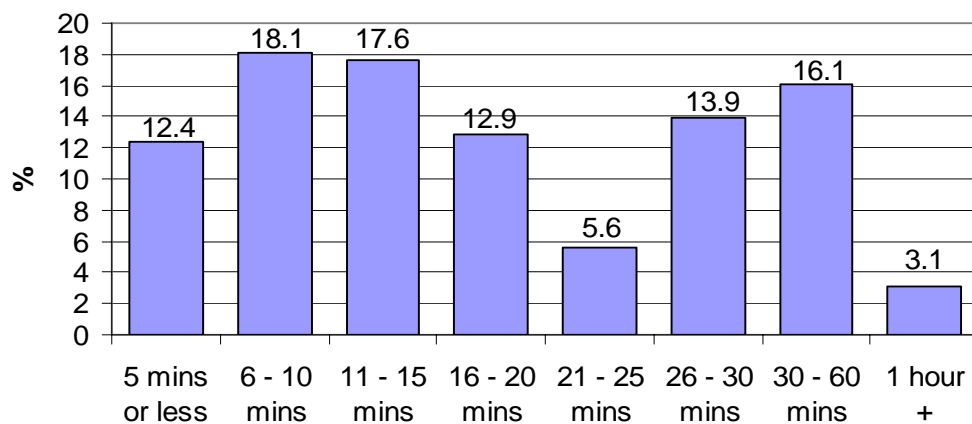
- **Figure 2** overleaf illustrates the mode of transport used by visitors to their main non bulky comparison goods centre. Three quarters of all respondents stated that they usually drive their car to the centre, whilst an equal proportion said that they walked or were a passenger (8%). Less than 6%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

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



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

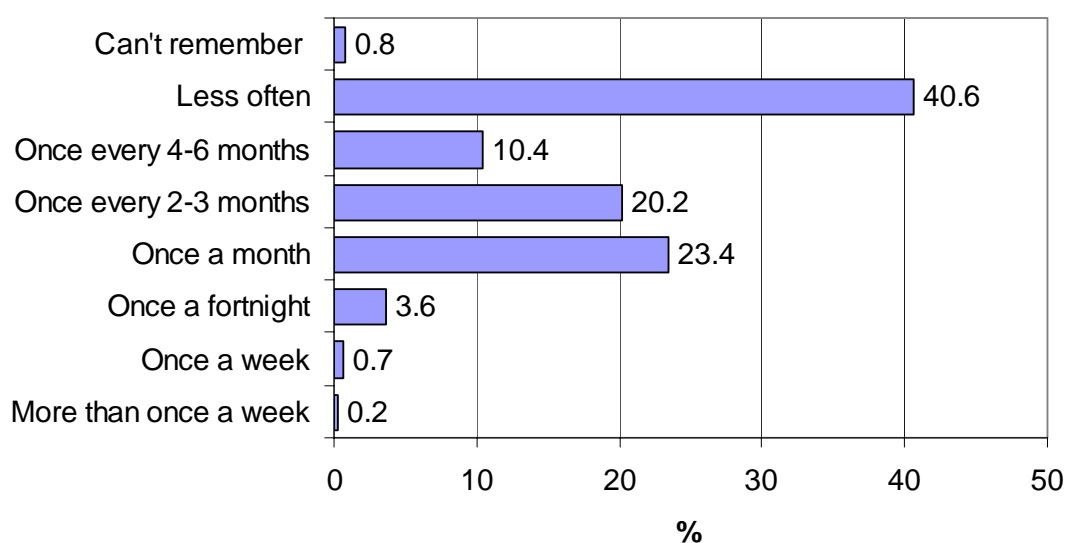
Figure 3 - Journey Time to Main Non Bulky Comparison Goods Centre



Bulky Comparison Goods Shopping

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

Figure 4 - Frequency of Using Main Bulky Comparison Goods Centre



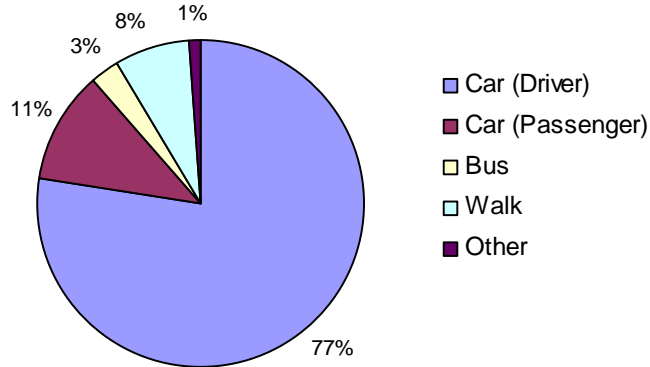
- The top five reasons given by respondents to the survey for choosing a main bulky comparison goods centre are set out in **Table 2**. Convenience and being close to home was overwhelmingly cited as the main reason, given by 76.9% of respondents. Almost all of respondents in Limerick City cited this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

Table 2 – Reason for Choosing Main Bulky Comparison Goods Centre

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

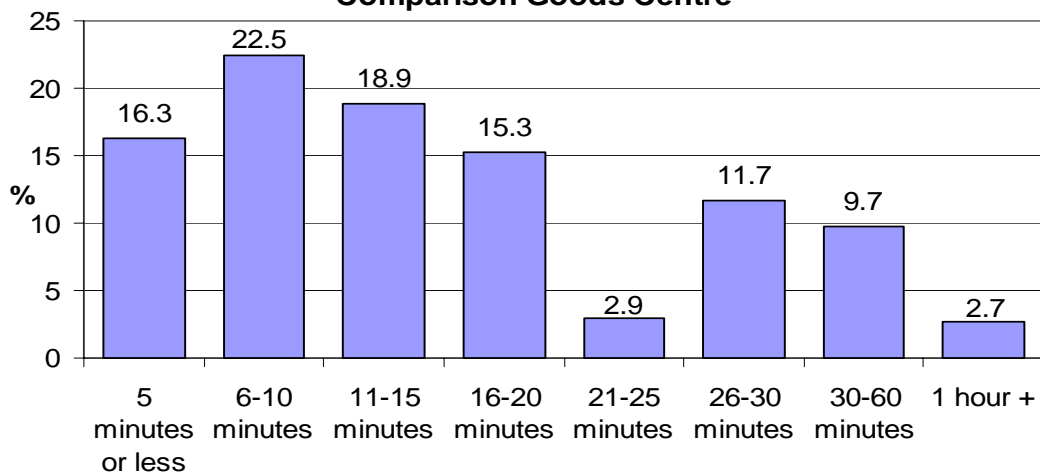
- **Figure 5** summarises the modes of transport used by respondents to travel to their main bulky comparison goods centre of choice. The most popular option was to drive one’s own car (77.5%), followed by being a passenger in a car (11%). Travelling by bus or using other modes of transport (by taxi,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

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



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

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



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APPENDIX 3E

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

CONVENIENCE GOODS CENTRE MARKET SHARES BY ZONE (COLUMN PERCENT)

Centre	Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Zone 1												
Limerick - Dunnes Stores, Jetland, Ennis Road	1	67.3%	1.3%	2.2%	0.8%	0.0%	2.1%	23.7%	0.0%	0.0%	0.0%	0.0%
Limerick - Lidl, Ennis Road	1	11.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Supervalu, Watchhouse Cross	1	1.0%	0.5%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Tesco, Coonagh Cross, Ennis Road	1	7.2%	0.7%	4.4%	1.6%	0.0%	1.0%	13.9%	0.0%	0.0%	0.0%	0.0%
Limerick - Other	1	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops / Post Office / Corner shop	1	3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	90.4%	2.5%	8.0%	2.4%	0.0%	3.1%	37.6%	0.0%	0.0%	0.0%	0.0%
Zone 2												
Limerick - Aldi, Parkpoint, Dublin Road	2	1.3%	5.4%	0.7%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Dunnes Stores, Parkway	2	2.5%	40.9%	10.1%	6.3%	0.0%	3.3%	4.3%	0.0%	0.0%	0.0%	0.0%
Roxborough - Tesco	2	0.0%	1.2%	14.7%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Other	2	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops / Post Office / Corner shop	2	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	3.8%	50.1%	25.4%	7.1%	0.0%	3.3%	4.3%	0.0%	0.0%	0.0%	0.0%
Zone 3												
Limerick - Centra (Any)	3	1.1%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Costcutter (Any)	3	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Tesco, Arthur's Quay, City Centre	2	0.0%	10.9%	6.2%	3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Aldi, Childers Road	3	0.7%	0.6%	4.5%	5.3%	0.4%	1.0%	2.1%	0.0%	0.0%	0.0%	0.0%
Limerick - Dunnes Stores, Childers Road Retail Park	3	1.6%	13.0%	18.7%	15.5%	2.4%	2.4%	1.1%	0.0%	0.0%	0.0%	0.0%
Limerick - Dunnes Stores, Harveys Quay, Henry Street, City Centre	3	0.9%	4.1%	12.3%	0.8%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Lidl, Childers Road	3	0.0%	0.9%	3.6%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops / Post Office / Corner shop	3	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	4.3%	29.4%	49.3%	26.7%	2.8%	4.1%	3.2%	0.0%	0.0%	0.0%	0.0%
Zone 4												
Limerick - Lidl, Castletroy	4	0.0%	0.0%	0.0%	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Superquinn, Castletroy Shopping Centre	4	0.9%	2.3%	0.5%	18.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dooradoyle - Tesco, Crescent Shopping Centre	4	0.0%	0.3%	14.6%	28.9%	1.3%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%
Askeaton - Supervalu	4	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limerick - Other	4	0.0%	0.0%	0.0%	0.0%	0.0%	6.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops / Post Office / Corner shop	4	0.0%	0.0%	0.0%	10.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	0.9%	2.6%	15.1%	61.7%	3.9%	6.6%	0.0%	0.0%	0.6%	0.0%	0.0%
Zone 5												
Abbeylea - Dunnes Stores	5	0.0%	0.0%	2.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Abbeylea - Supervalu	5	0.0%	0.0%	0.0%	0.0%	7.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Abbeylea - Tesco	5	0.0%	0.0%	0.0%	0.0%	14.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newcastle West - Supervalu	5	0.0%	0.0%	0.0%	0.0%	11.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newcastle West - Lidl	5	0.0%	0.0%	0.0%	0.0%	10.5%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Newcastle West - Tesco	5	0.0%	0.0%	0.0%	0.0%	27.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Glin(Any)	5	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops / Post Office / Corner shop	5	0.0%	0.0%	0.0%	0.0%	12.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	0.0%	0.0%	2.0%	0.0%	88.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 6												
Killmallock - Supervalu	6	0.0%	0.0%	0.0%	0.0%	0.0%	11.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Killmallock - Other	6	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Bruff - Eurospar	6	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops / Post Office / Corner shop	6	0.0%	0.0%	0.0%	0.0%	0.0%	33.1%	0.0%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	0.0%	0.0%	0.0%	0.0%	0.0%	47.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 7												
Killaloe - Supervalu	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.6%	0.0%	0.0%	0.0%	0.0%
Scarriff (Any)	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%
Shannon - Dunnes Stores, Sky Court	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	16.0%	0.0%	0.0%	0.0%	0.0%
Shannon - Lidl	7	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	1.4%	0.0%	0.0%	0.0%	0.0%
Killaloe - Other	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%
Sixmilebridge (Any)	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%
Local shops / Post Office / Corner shop	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.0%	0.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	37.1%	0.0%	0.0%	0.0%	0.0%
Zone 8												
Corbally - Supervalu	8	0.0%	11.7%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%
Corbally - Tesco Express	8	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ennis - Aldi, Francis Street	8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	6.7%	8.6%	0.0%	0.0%
Ennis - Dunnes Stores, Clon Road	8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	24.1%	23.5%	0.0%	0.0%
Ennis - Lidl, Gort Road	8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	2.2%	3.3%	0.0%	0.0%
Ennis - Tesco, Ennis Shopping Centre	8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	52.1%	22.4%	0.0%	0.0%
Killrush - Supervalu	8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%
Ennis - Other	8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	1.3%	0.0%	0.0%	0.0%
Milltown - Londis	8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.0%	0.0%	0.0%	0.0%
SUBTOTAL	-	0.0%	13.7%	0.0%	0.0%	0.0%	0.0%	12.5%	96.4%	57.9%	0.0%	0.0%
Zone 9												
Ennistymon - Supervalu	9	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	32.9%	0.0%	0.0%
Carofin - Europa	9	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.0%
Local shops / Post Office / Corner shop	9	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%
SUBTOTAL	-	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	35.9%	0.0%	0.0%
Zone 10												
Nenagh - Dunnes Stores	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	16.8%	0.0%
Nenagh - Lidl	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%
Nenagh - Supervalu	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%
Nenagh - Tesco	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	15.3%	0.0%
Thurles - Dunnes Stores	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	16.4%	1.9%
Thurles - tesco	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.0%	1.5%
Nenagh - Other	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	17.0%	0.0%
Thurles - Other	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.7%	3.9%
Templemore - Centra	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%
Templemore - Lidl	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%	0.0%
Templemore - Spar	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%
Local shops / Post Office / Corner shop	10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%
SUBTOTAL	-	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	98.8%	7.3%
Zone 11												
Tipperary - Lidl	11	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	9.4%
Tipperary - Dunnes Stores	11	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%	0.0%	0.0%	0.0%	0.0%	11.2%
Tipperary - Supervalu	11	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	17.9%
Tipperary - Other	11	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	7.5%
Cahir - Spar	11	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%
Cashel - Lidl	11	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Cashel - Supervalu	11	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.1%
Cashel - Tesco	11	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.7%
Dundrum - Centra	11	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
SUBTOTAL	-	0.0%	0.0%	0.0%	0.0%	0.0%	7.3%	0.0%	0.0%	0.0%	0.0%	69.0%
Outside of Study Area												
Charleville - Dunnes Stores	-	0.0%	0.0%	0.0%	0.0%	2.2%	4.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Charleville - Lidl	-	0.0%	0.0%	0.0%	0.0%	0.7%	5.1%	0.0%	0.0%	0.0%	0	

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2010-2016

APPENDIX 4

Technical Data

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APPENDIX 4A

Population Estimates and Projections

REVIEW OF MID WEST RETAIL STRATEGY

Quantitative Retail Floorspace Need Assessment

Population Estimates and Projections

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

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

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

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

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

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

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

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

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

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

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2010-2016

APPENDIX 4B

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



Prospects for Retail Goods Expenditure in Ireland

March 2009

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Introduction and Summary

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





Macroeconomic Background

The consumer boom comes to an end

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

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

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

The recovery will be slow...

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

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

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



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

...but Ireland compares favourably to the UK

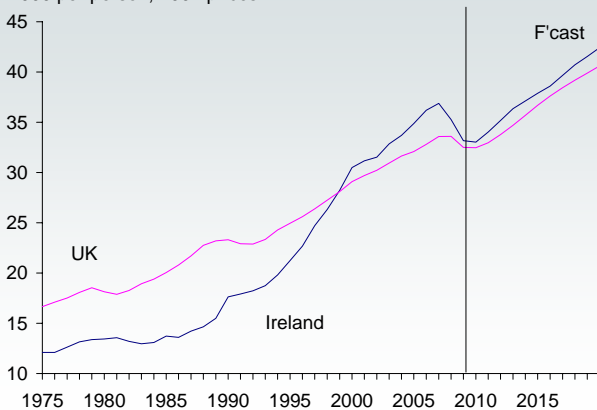
Historically, the UK has been more prosperous than Ireland, with GDP per capita in the UK on average being 33% higher than that GNP in Ireland between 1975 and 1999 (we have used GNP in Ireland as the comparator for GDP in the UK as the high level of foreign ownership of Irish industry and the consequent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

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

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

GDP/GNP per head

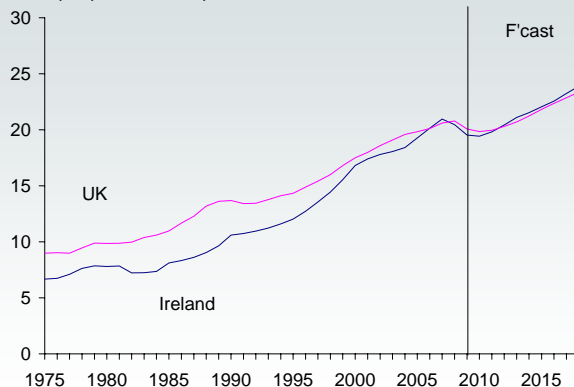
€000 per person, 2007 prices



Source: Haver Analytics/Oxford Economics

Consumer spending per head

€000 per person, 2007 prices



Source: Haver Analytics/Oxford Economics



Spending on Retail Goods in Ireland

Sources & Definitions

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

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

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

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

Categories

The spending data were categorised as follows:

Convenience Goods:

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

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

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





Convenience Goods continued

COICOPS 9.5.2 Newspapers

Non-Bulky Comparison Goods:

COICOPS 3.0 Clothing and footwear

COICOPS 5.2 Household textiles

COICOPS 5.4 Glassware, tableware and household utensils

COICOPS 6.1 Medical products, appliances and equipment

COICOPS 9.5.1 Books & Stationary

COICOPS 9.3 Other recreational items and equipment, gardens and pets

COICOPS 12.1.2 + 12.1.2 Personal Care Products

COICOPS 12.3 Personal effects n.e.c.

Bulky Comparison Goods

COICOPS 4.3.1 Repair & Maintenance materials

COICOPS 5.1 Furniture and furnishings, carpets and other floor coverings

COICOPS 5.3 Household appliances

COICOPS 5.5 Tools and equipment for house and garden

COICOPS 9.1 Audio-visual, photographic and information processing equipment

COICOPS 9.2 Other major durables for recreation and culture

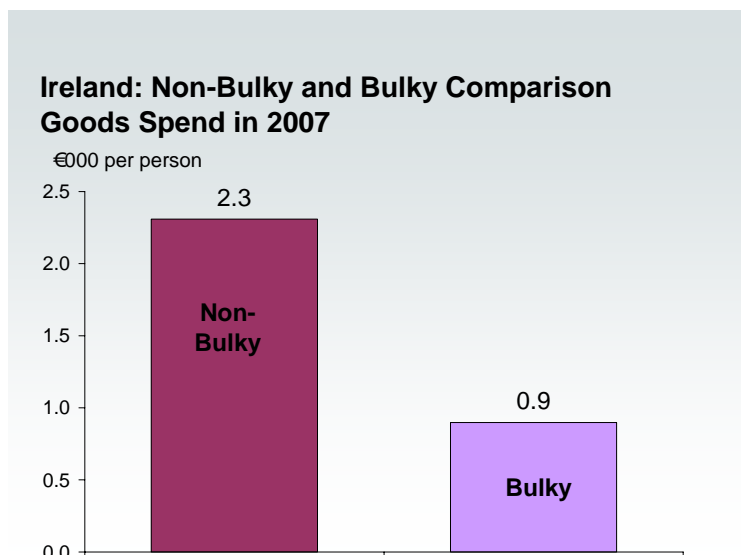
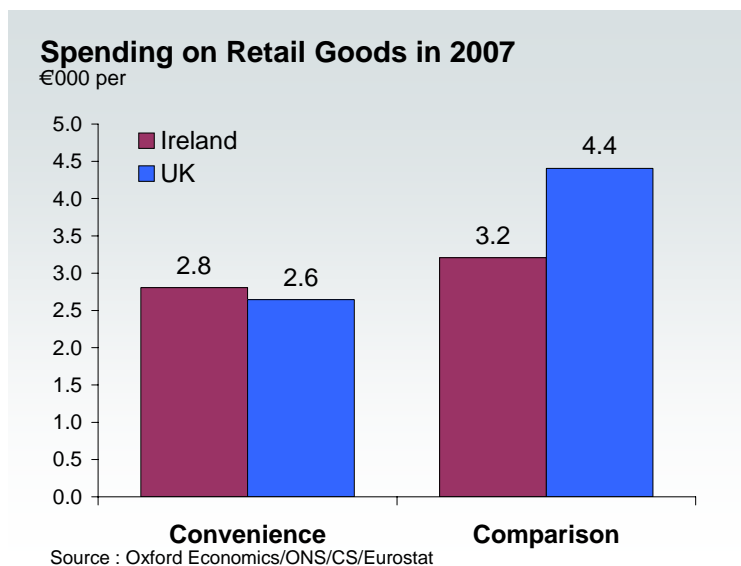


Spending Levels in 2007

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

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

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





Historical and Future Trends

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

Average Annual Growth Rates of Real Spending per person*

Ireland

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

* 2007 prices.

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

Average Annual Growth Rates of Real Spending per Person*

UK

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

* 2007 prices.

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

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



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

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

Bulky and Non-Bulky Comparison Goods

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

Average Annual Growth Rates of Real Spending per person*

Ireland

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

* 2007 prices.

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



Forecasts vs Projections

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

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

Implications for the Mid-West

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

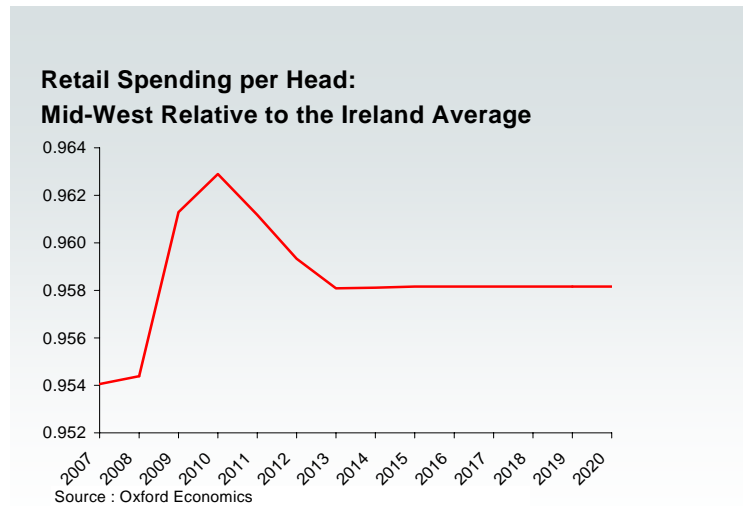
In 2007, these show lower (-4.6%) retail spending on retail goods per person in the Mid-West relative to Ireland as a whole. A substantial narrowing of the differential is expected in 2009 as the recession in Ireland impacts much more on the rest of the Southern and Eastern NUTS 2 region, particularly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

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

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



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



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

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

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

* 2007 prices.

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



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



Data Appendices

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

(€ per person)

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

Source: Oxford Economics/CSO/Eurostat

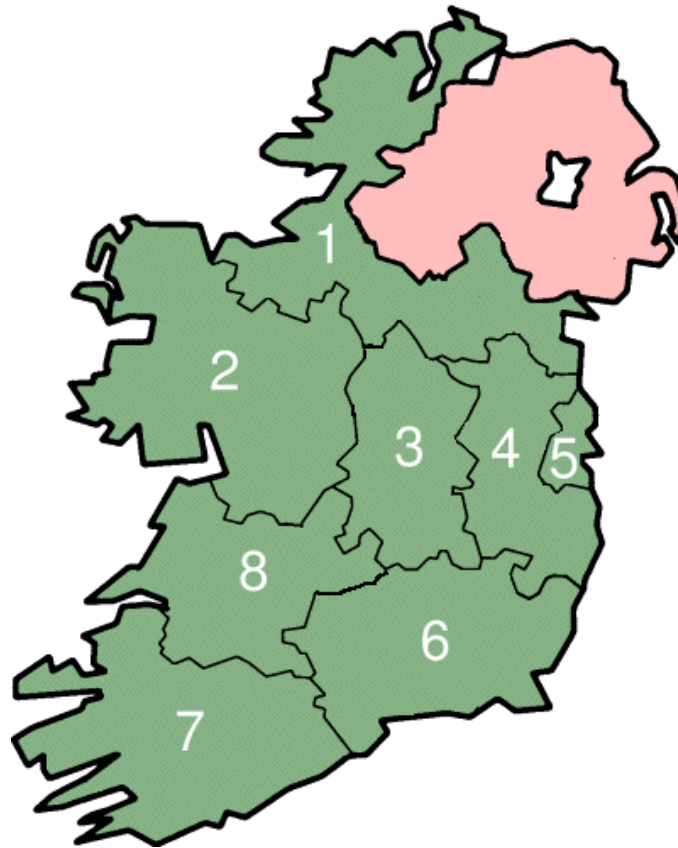


Appendix 2: Retail Spending per Head in the Mid-West of Ireland
(€ per person)

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



Appendix 3: NUTS Regions in Ireland



Key:

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

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APPENDIX 4C

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

REVIEW OF MID WEST RETAIL STRATEGY

Quantitative Retail Floorspace Need Assessment

Methodology for Estimating Inflow Expenditure from Outside the Household Survey Area

1. The main purpose of the household telephone survey is to quantify the distribution of available retail expenditure on convenience goods and comparison goods amongst existing centres, retail parks and stores. This allocation of spend relates to only the residential population **within the survey area**, which consists of Clare County, Limerick County, Limerick City and North Tipperary, as well as part of South Tipperary (See **Figure 1.1** in main report).

2. The relatively extensive survey area covers the whole of the Mid West Region and has been designed to capture the vast majority of shopping trips made to Limerick City, Ennis and other leading centres within the region. Nevertheless, in addition, there will also be retail spending at centres and shops within the Mid West from people **living outside of the region**. In practice, such spenders will fall into two groups:-
 - residents living just outside the Mid West Region;

 - tourists to the region who originate from the rest of the country and overseas.

Expenditure by Residents Living Just Outside the Mid West Region

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

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

Expenditure by Tourists to the Mid West Region

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

5. The approach to estimating in-flow spend by tourists consists of a number of steps as follows:-

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

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

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

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

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

Origin of Tourists	€Million
Domestic	138.5
Northern Ireland	11.2
Overseas	368.1
Total	517.8

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

(b) Allocate Total Tourist Spend by County

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

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

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

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

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

(c) Estimate Actual Total Tourist Spend by County

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

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

(d) Estimate Actual Tourist Spend on Shopping by County

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

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

¹ Source: Failte Ireland, Tourism Facts, 2007.

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

13. There is no reliable information published on the types of shops at which tourists spend their money. The analysis is therefore informed by a street survey of tourists in Dublin City Centre carried out by Colliers CRE in October 2007 to inform the Revised GDA Retail Strategy.¹ This estimated the following breakdown of tourist spend:-

Category of Goods	Col %
Convenience goods	8
Comparison goods	92
Total	100

14. Taken at face value, the Mid West appears a very different area for tourism than Dublin. A major driver of retail spend for convenience goods shopping is the type of accommodation used; the more bed nights in rental accommodation or caravans/camping the higher the likely levels of spending on groceries, since visitors are more likely to cater for themselves rather than eat out in pubs or restaurants. In the Mid West 37% of tourist bed nights are accounted for by these forms of accommodation, which is very close to the figures for Dublin and Ireland as a whole.
15. Accordingly, in relation to the Mid West, there appears to be no real justification for making a major adjustment to the 8% share of spend on convenience goods. Nevertheless, “gut feel” suggests it may, in practice, be a little higher, so the proportion is rounded-up to 10%. This mans an estimated 90% of tourist spend in the Mid West in shops is on comparison goods. Given the nature of bulky

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

comparison goods (mainly found in out of centre retail warehouses in the Mid West), it is further assumed that **all** the comparison spend is on **non-bulky** comparison goods.

16. The estimated disaggregation of tourist spend in 2007 by broad category of goods is therefore:-

Area	Convenience Goods (€Million)	Comparison Goods (€Million)
County Clare	3.6	32.4
County Limerick (incl. City)	4.8	43.2
North Tipperary	0.4	3.6
Total	8.8	79.2

(f) Allocate Tourist Retail Spend Within Each County By Town and Sub-Area

17. There is no information available on tourist retail expenditure flows at the local level. It is therefore assumed that tourist spend on shopping within each County is distributed according to the pattern of resident consumer retail expenditure to major centres/sub-areas – this data is generated by the household survey. This distribution is set out in the table overleaf.

County	Centre/Area	Distribution of Expenditure Originating from Residents		Allocation of Tourist Spend, 2007	
		Convenience Goods (%)	Non-Bulky Comparison Goods (%)	Convenience Goods (€Million)	Non-Bulky Comparison Goods (€Million)
Clare	<i>Ennis</i>	65	79	2.3	25.6
	<i>Shannon</i>	9	6	0.3	1.9
	<i>Rest of County</i>	26	15	1.0	4.9
	Sub-Total	100	100	3.6	32.4
County Limerick (incl.City)	<i>City Centre</i>	5	61	0.2	26.3
	<i>Rest of City</i>	48	9	2.3	3.9
	<i>Crescent Shopping Centre,</i>	12	24	0.6	10.4
	<i>Rest of Limerick – Suburbs (excl. City)</i>	13	1	0.6	0.4
	<i>Rest of County</i>	22	5	1.1	2.2
	Sub-Total	100	100	4.8	43.2
North Tipperary	All Centres	100	100	0.4	3.6
Total	-	-	-	8.8	79.2

Forecast Growth in Tourist Retail Expenditure

18. There are no forecasts available for the likely future number of tourists to the Mid West Region, let alone likely levels of tourist spending on shopping. Published statistics by Failte Ireland show that total tourism revenue (according to their

estimates) in the Shannon Region (almost identical to the Mid West) increased by 19% between 2003 and 2007 (at current prices).¹ However, discounting for inflation reduces the ‘real’ growth in overall tourist spend to around 6% over four or less than 2% per annum. It is assumed that tourist spend on shopping will have risen at the same rate as total tourist revenue.

19. Failte Ireland advise that due to the economic downturn, the real growth in tourist revenues experienced in recent years is unlikely to continue and may even fall. For this reason it is assumed that the 2007 levels of tourist shopping spend will remain constant through to 2010 (at 2007 prices). Thereafter, we assume a return to trend and apply a 2% per annum real growth for the Mid West Region.
20. The estimated tourist shopping spends by County (at constant 2007 prices) at the base year of 2009 and the forecast years of 2016 and 2022 are as follows:-

County	Year	Convenience Goods (€Million)	Non-Bulky Comparison Goods (€Million)
Clare	2009	3.6	32.4
	2016	4.0	36.4
	2022	4.6	41.1
Limerick (incl. City)	2009	4.8	43.2
	2016	5.4	48.7
	2022	6.2	54.9
North Tipperary	2009	0.4	3.6
	2016	0.4	4.1
	2016	0.5	4.6
Total	2009	8.8	79.2
	2016	9.8	89.2
	2022	11.3	100.6

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

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APPENDIX 5

**Retail Floorspace Data: Floorspace Stock
Figures and Turnover Estimates**

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APPENDIX 5A

**Methodology for Estimating Existing Retail
Floorspace Stock**

QUANTITATIVE RETAIL FLOORSPACE NEED ASSESSMENT

Methodology for Estimating Existing (March 2009) Retail Floorspace Stock and Retail Development Pipeline within the Mid West Region

The retail floorspace in the quantitative need assessment is categorised into convenience goods, non-bulky comparison goods and bulky comparison goods/retail warehousing using the definitions set out in **Table 1** below. These definitions are consistent with those adopted for the estimation of consumer retail expenditure per head.

Table 1: Use Category Definitions

Convenience	Food Alcoholic and non alcoholic beverages Tobacco Non-durable household goods
Non-Bulky Comparison	Clothing and footwear Furniture, furnishings and household equipment (excluding non-durable household goods) Medical and pharmaceutical products, therapeutic appliances and equipment Educational and recreation equipment and accessories Books, newspapers and magazines Goods for personal care and goods not elsewhere classified The value of repairs is excluded in all cases.
Bulky Comparison	Goods generally sold from retail warehouses where DIY goods or goods such as flatpack furniture are of such a size that they would normally be taken away by car and not be manageable by customers travelling by foot, cycle or bus, or that large floor areas would be required to display them e.g. furniture in room sets, or not large individually, but part of a collective purchase which would be bulky e.g. wallpaper, paint.

Source: *Retail Planning: Guidelines for Planning Authorities, Annex 1, January 2005*

The floorspace data relates to properties in 'retail use' only, meaning services normally found on the high street (such as banks, post offices, hairdressers, travel agents and cafes) are excluded. Also excluded are car showrooms.

In order to calculate the existing (March 2009) retail floorspace in the Mid West Region, the retail floorspace generated by DTZ Sherry FitzGerald in December 2001 is used as a start point and baseline in all counties, except County Clare where up to date existing floorspace data was provided for March 2009. Each Council within the Mid West Region then provided details of planning applications that had received planning consent since December 2001. Information for each application included the amount of floorspace by type, location and status (i.e. permission or built). Only schemes that had been built were included at this point. The addition of the DTZ Sherry FitzGerald (2001) baseline retail floorspace totals and completions (excluding services) between 2001-2009 provide the estimates of current (March 2009) retail goods floorspace stock by centre, Council area and for the Mid West Region as a whole.

It should be noted that the existing retail floorspace stock totals for County Clare, the City of Limerick and North Tipperary County exclude (any) vacant, built floorspace. However, the existing floorspace data prepared by Limerick County Council includes vacant units. In our report (and needs assessment), we have excluded vacant units. Vacancy within Limerick County has been estimated by Colliers CRE following visits to all of the centres in February/March 2009. The following assumptions have been adopted:

For Limerick City Environs (% of floorspace vacant)

Convenience Goods – 0%

Non-Bulky Comparison Goods – 5%

Bulky Comparison Goods – 25%

For Limerick County Towns (% of floorspace vacant)

Convenience Goods – 5%

Non-Bulky Comparison Goods – 10%

Bulky Comparison Goods – 10%

Schemes that are cited by the Councils as being under construction, and/or with planning consent, but not yet built, as at March 2009, are defined as retail floorspace in the 'pipeline'. The pipeline floorspace does not include retail schemes that are either in the pre-planning or application stage.

Spreadsheets have been created for each county. These tables summarise by centre and broad retail goods category, the retail goods floorspace supply in 2001, the amount of new floorspace built between December 2001 and March 2009, the existing retail floorspace stock at March 2009 and lastly, the quantum of retail floorspace in the pipeline. The total amount of retail floorspace (existing (2009) shopping floorspace, plus pipeline) is also given.

Gross floorspace data was provided for the five Limerick County towns and we have, therefore, adopted the following ratios in converting the data to net retail floorspace (sales space).

Convenience Goods – 66:100 net to gross

Non-Bulky Comparison Goods – 66:100 net to gross

Bulky Comparison Goods – 90:100 net to gross

The ratio for convenience goods is the same as for non-bulky comparison goods and reflects the floorspace mix in modern, larger format supermarkets and superstores.

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APPENDIX 5B

**Existing Retail Floorspace and Retail
Development Pipeline**

Limerick City: Existing (March 2009) Retail Floorspace and Retail Development Pipeline (All Figures in Sq M Net)

Location	Centre	Existing Convenience Floorspace (Excl New Build Since Dec 2001)	Convenience Floorspace Built Since Dec 2001	Existing Convenience Floorspace March 2009	Pipeline Convenience Floorspace	Existing plus Pipeline Convenience Floorspace	Existing Non-Bulky Comparison Floorspace (Excl New Build Since Dec 2001)	Non-Bulky Comparison Floorspace Built Since Dec 2001	Existing Non-Bulky Comparison Floorspace March 2009	Pipeline Non-Bulky Comparison Floorspace	Existing plus Pipeline Non-Bulky Comparison Floorspace	Existing Bulky Comparison Floorspace (Excl New Build Since Dec 2001)	Bulky Comparison Floorspace Built Since Dec 2001	Existing Bulky Comparison Floorspace March 2009	Pipeline Bulky Comparison Floorspace	Existing plus Pipeline Bulky Comparison Floorspace	All Existing Retail Floorspace (Excl New Build Since Dec 2001)	All Retail Floorspace Built Since Dec 2001	All Existing Retail Floorspace March 2009	All Pipeline Retail Floorspace	All Existing plus Pipeline Retail Floorspace
Limerick City Centre	Limerick - City Centre	7,725	1,069	8,794	1,980	10,774	43,229	6,386	49,615	11,880	61,495	8,837	0	8,837	0	8,837	59,791	7,455	67,246	13,860	81,106
	Arthurs Quay Shopping Centre	2,489	0	2,489	0	2,489	735	0	735	0	735	0	0	0	0	0	3,224	0	3,224	0	3,224
Limerick City Centre Total		10,214	1,069	11,283	1,980	13,263	43,964	6,386	50,350	11,880	62,230	8,837	0	8,837	0	8,837	63,015	7,455	70,470	13,860	84,330
Limerick City Out of Centre	Limerick - Out of Centre	4,608	8,426	13,034	1,980	15,014	2,597	22,495	25,092	6,488	31,580	7,165	17,683	24,848	2,295	27,143	14,370	48,604	62,974	10,763	73,737
	Parkway District Centre	3,000	0	3,000	0	3,000	4,002	0	4,002	0	4,002	448	0	448	0	448	7,450	0	7,450	0	7,450
	Roxboro Shopping Centre	3,021	0	3,021	0	3,021	437	0	437	0	437	0	0	0	0	0	3,458	0	3,458	0	3,458
Limerick Out of Centre Total		10,629	8,426	19,055	1,980	21,035	7,036	22,495	29,531	6,488	36,019	7,613	17,683	25,296	2,295	27,591	25,278	48,604	73,882	10,763	84,645
Limerick City Total		20,843	9,495	30,338	3,960	34,298	51,000	28,881	79,881	18,368	98,249	16,450	17,683	34,133	2,295	36,428	88,293	56,059	144,352	24,623	168,975

Note: Existing retail floorspace totals exclude vacant units.

Source: Limerick City Council and Colliers CRE , 2009.

Limerick County: Existing (March 2009) Retail Floorspace and Retail Development Pipeline (All Figures in Sq M Net)

Location	Centre	Existing Convenience Floorspace Dec 2001	Convenience Floorspace Built Since Dec 2001	Existing Convenience Floorspace March 2009	Pipeline Convenience Floorspace	Existing plus Pipeline Convenience Floorspace	Existing Non Bulky Comparison Floorspace Dec 2001	Non-Bulky Comparison Floorspace Built Since Dec 2001	Existing Non Bulky Comparison Floorspace March 2009	Pipeline Non Bulky Comparison Floorspace	Existing plus Pipeline Non Bulky Comparison Floorspace	Existing Bulky Comparison Floorspace Dec 2001	Bulky Comparison Floorspace Built Since Dec 2001	Existing Bulky Comparison Floorspace March 2009	Pipeline Bulky Comparison Floorspace	Existing plus Pipeline Bulky Comparison Floorspace	All Existing Retail Floorspace Dec 2001	All Retail Floorspace Built Since Dec 2001	All Existing Retail Floorspace March 2009	All Pipeline Retail Floorspace	All Existing plus Pipeline Retail Floorspace
Limerick City Environs	Limerick City Environs	4,363	3,786	8,149	5,388	13,537	2,933	4,823	7,756	13,487	21,243	5,349	32,112	37,461	8,058	45,519	12,645	40,721	53,366	26,933	80,299
	Castletroy Court Shopping Centre	3,329	3,329	6,658	5,104	11,762	1,032	1,032	2,064	4,234	6,298	0	0	0	0	0	4,361	4,361	8,722	9,338	18,060
	Crescent Shopping Centre	3,396	7,220	10,616	0	10,616	13,106	5,415	18,521	0	18,521	0	0	0	0	0	16,502	12,635	29,137	0	29,137
	Riverside Retail Park	0	0	0	0	0	0	0	0	0	0	3,807	1,623	5,430	3,394	8,824	3,807	1,623	5,430	3,394	8,824
Limerick City Total		11,088	14,335	25,423	10,492	35,915	17,071	11,270	28,341	17,721	46,062	9,156	33,735	42,891	11,452	54,343	37,315	59,340	96,655	39,665	136,320
Limerick County Towns	Abbeyfeale	2,000	1,774	3,774	0	3,774	3,500	0	3,500	0	3,500	1,500	0	1,500	0	1,500	7,000	1,774	8,774	0	8,774
	Adare	1,500	504	2,004	0	2,004	2,500	180	2,680	0	2,680	500	0	500	0	500	4,500	684	5,184	0	5,184
	Newcastlewest	3,513	2,550	6,063	0	6,063	5,251	1,390	6,641	0	6,641	2,072	1,346	3,418	0	3,418	10,836	5,286	16,122	0	16,122
	Rathkeale	1,500	292	1,792	779	2,571	2,500	1,383	3,883	0	3,883	1,000	0	1,000	0	1,000	5,000	1,674	6,674	779	7,453
	Kilmallock	1,000	332	1,332	494	1,826	2,000	0	2,000	0	2,000	500	0	500	0	500	3,500	332	3,832	494	4,326
Limerick County Towns Total		9,513	5,452	14,965	1,273	16,238	15,751	2,952	18,703	0	18,703	5,572	1,346	6,918	0	6,918	30,836	9,750	40,586	1,273	41,859
Limerick County Total		20,601	19,787	40,388	11,765	52,153	32,822	14,222	47,044	17,721	64,765	14,728	35,081	49,809	11,452	61,261	68,151	69,090	137,241	40,938	178,179

December 2001 retail floorspace for Abbeyfeale, Adare, Rathkeale and Kilmallock estimated by Colliers CRE.

Note: The existing floorspace data prepared by the County Council includes vacant units.*

Source: Limerick County Council and Colliers CRE, 2009.

*In our report (and needs assessment), we have excluded vacant units. Vacancy has been estimated by Colliers CRE following visits made to all of the centres in February/March 2009. The following assumptions have been adopted:

For Limerick City Environs (% of floorspace vacant)

Convenience Goods - 0%
 Non-Bulky Comparison Goods - 5%
 Bulky Comparison Goods - 25%

For Limerick County Towns (% of floorspace vacant)

Convenience Goods - 5%
 Non-Bulky Comparison Goods - 10%
 Bulky Comparison Goods - 10%

County Clare: Existing (March 2009) Retail Floorspace and Retail Development Pipeline (All Figures in Sq M Net)

Location	Centre	Existing Convenience Floorspace March 2009	Pipeline Convenience Floorspace	Existing plus Pipeline Convenience Floorspace	Existing Non-Bulky Comparison Floorspace March 2009	Pipeline Non-Bulky Comparison Floorspace	Existing plus Pipeline Non-Bulky Comparison Floorspace	Existing Bulky Comparison Floorspace March 2009	Pipeline Bulky Comparison Floorspace	Existing plus Pipeline Bulky Comparison Floorspace	All Existing Retail Floorspace March 2009	All Pipeline Retail Floorspace	All Existing plus Pipeline Retail Floorspace	Vacant Floorspace March 2009
Ennis	Ennis - Town Centre	5,421	0	5,421	11,064	0	11,064	3,735	0	3,735	20,220	0	20,220	1,563
	Ennis - Out of Centre	3,930	165	4,095	221	495	716	839	0	839	4,990	660	5,650	9,243
	Ennis Retail Parks	0	853	853	2,498	531	3,029	21,466	650	22,116	23,964	2,034	25,998	0
Ennis Total		9,351	1,018	10,369	13,783	1,026	14,809	26,040	650	26,690	49,174	2,694	51,868	10,806
Kilrush	Kilrush Town Centre	3,976	1,029	5,005	2,660	2,193	4,853	959	5,735	6,694	7,596	8,957	16,552	825
Kilrush Total		3,976	1,029	5,005	2,660	2,193	4,853	959	5,735	6,694	7,596	8,957	16,552	825
West Clare	Kilkee	563	0	563	0	0	0	0	0	0	563	0	563	0
West Clare Total		563	0	563	0	0	0	0	0	0	563	0	563	0
North Clare	Ennistymon	2,084	0	2,084	489	434	923	0	0	0	2,573	434	3,007	0
	Lisdoonvarna	337	299	636	114	0	114	0	0	0	451	299	750	0
	Miltown Malbay	490	0	490	219	0	219	0	0	0	710	0	709	0
	Ballyvaughan	411	0	411	26	0	26	0	0	0	437	0	437	0
	Lahinch	1,558	0	1,558	329	0	329	0	0	0	1,887	0	1,887	0
	Corofin	415	0	415	203	0	203	0	0	0	618	0	618	0
North Clare Total		5,295	299	5,594	1,380	434	1,814	0	0	0	6,675	733	7,408	0
East Clare	Killaloe	940	0	940	1,006	0	1,006	0	0	0	1,946	0	1,946	0
	Scarrif/Tuamgraney	1,160	0	1,160	608	0	608	0	0	0	1,768	0	1,768	0
	Tulla	577	702	1,279	436	483	919	0	0	0	1,013	1,185	2,198	0
East Clare Total		2,677	702	3,379	2,050	483	2,533	0	0	0	4,727	1,185	5,912	0
South Clare	Shannon - Town Centre	2,627	3,429	6,056	2,382	3,293	5,675	5,054	0	5,054	10,063	6,722	16,785	440
	Sixmilebridge	845	478	1,323	911	485	1,396	0	0	0	1,756	963	2,719	0
	Westbury (Athlunkard)	743	0	743	305	0	305	0	0	0	1,048	0	1,048	0
	Bunratty	168	0	168	1,059	1,116	2,175	0	0	0	1,227	1,116	2,343	0
	Newmarket-on-Fergus	890	0	890	154	746	900	0	0	0	1,045	746	1,790	0
South Clare Total		5,273	3,907	9,180	4,811	5,640	10,451	5,054	0	5,054	15,138	9,547	24,685	440
County Clare Total		27,135	6,955	34,090	24,684	9,776	34,460	32,053	6,385	38,438	83,872	23,116	106,988	12,071

Note: Existing retail floorspace totals exclude vacant units.

Source: Clare County Council and Colliers CRE, 2009.

North Tipperary: Existing (March 2009) Retail Floorspace and Retail Development Pipeline (All Figures in Sq M Net)

Location	Centre	Existing Convenience Floorspace Dec 2001	Convenience Floorspace Built Since Jan 04	Existing Occupied Convenience Floorspace March 2009	Pipeline Convenience Floorspace	Existing Occupied plus Pipeline Convenience Floorspace	Existing Non Bulky Comparison Floorspace Dec 2001	Non-Bulky Comparison Floorspace Built Since Jan 04	Existing Occupied Non-Bulky Comparison Floorspace March 2009	Pipeline Non Bulky Comparison Floorspace	Existing Occupied plus Pipeline Non Bulky Comparison Floorspace	Existing Bulky Comparison Floorspace Dec 2001	Bulky Comparison Floorspace Built Since Jan 04	Existing Occupied Bulky Comparison Floorspace March 2009	Pipeline Bulky Comparison Floorspace	Existing Occupied plus Pipeline Bulky Comparison Floorspace	All Existing Retail Floorspace Dec 2001	All Retail Floorspace Built Since Jan 04	All Existing Occupied Retail Floorspace March 2009	All Pipeline Retail Floorspace	All Existing Occupied plus Pipeline Retail Floorspace
Nenagh	Nenagh Town	6,437	5,206	11,643	0	11,643	7,082	3,129	10,211	0	10,211	0	6,582	6,582	0	6,582	13,519	14,917	28,436	0	28,436
	O'Connors Shopping Centre	1,803	0	1,803	0	1,803	2,071	0	2,071	0	2,071	0	0	0	0	0	3,874	0	3,874	0	3,874
Nenagh Total		8,240	5,206	13,446	0	13,446	9,153	3,129	12,282	0	12,282	0	6,582	6,582	0	6,582	17,393	14,917	32,310	0	32,310
Roscrea	Roscrea Town	2,911	1,977	4,888	0	4,888	5,188	1,721	6,909	517	7,426	0	4,580	4,580	5,808	10,388	8,099	8,278	16,377	6,325	22,702
	Castle Street Shopping Centre	1,245	0	1,245	0	1,245	326	0	326	0	326	0	0	0	0	0	1,571	0	1,571	0	1,571
Roscrea Total		4,156	1,977	6,133	0	6,133	5,514	1,721	7,235	517	7,752	0	4,580	4,580	5,808	10,388	9,670	8,278	17,948	6,325	24,273
Thurles	Thurles Town	5,659	3,968	9,627	1,800	11,427	6,881	0	6,881	5,916	12,797	2,059	12,854	14,913	2,926	17,839	14,599	16,822	31,421	10,642	42,063
	Thurles Shopping Centre	1,664	678	2,342	0	2,342	2,457	0	2,457	4,084	6,541	0	0	0	0	0	4,121	678	4,799	4,084	8,883
Thurles Total		7,323	4,646	11,969	1,800	13,769	9,338	0	9,338	10,000	19,338	2,059	12,854	14,913	2,926	17,839	18,720	17,500	36,220	14,726	50,946
Other Towns	Ballina/Birdhill		0	0	0	0		273	273	0	273	0	0	0	0	0	0	273	273	0	273
	Newport		0	0	3,987	3,987		0	0	6,189	6,189	0	0	0	0	0	0	0	0	10,176	10,176
	Borrisokane		1,496	1,496	0	1,496		879	879	0	879	0	0	0	0	0	0	2,375	2,375	0	2,375
	Templemore		1,724	1,345	3,069	0	3,069	682	0	682	0	682	3,387	0	3,387	0	3,387	5,793	1,345	7,138	0
Other Towns Total		1,724	2,841	4,565	3,987	8,552	682	1,152	1,834	6,189	8,023	3,387	0	3,387	0	3,387	5,793	3,993	9,786	10,176	19,962
North Tipperary County Total		21,443	14,670	36,113	5,787	41,900	24,687	6,002	30,689	16,706	47,395	5,446	24,016	29,462	8,734	38,196	51,576	44,688	96,264	31,227	127,491

Negligible amount (assumed to be zero)

Note: Existing retail floorspace totals exclude vacant units.

Source: North Tipperary County Council and Colliers CRE, 2009.

Location	Centre	Existing Vacant Convenience Floorspace March 2009	Existing Vacant Non-Bulky Comparison Floorspace March 2009	Existing Vacant Bulky Comparison Floorspace March 2009
Nenagh	Nenagh Town	0	0	2,100
	O'Connors Shopping Centre	0	0	0
Nenagh Total		0	0	2,100
Roscrea	Roscrea Town	0	0	0
	Castle Street Shopping Centre	0	0	0
Roscrea Total		0	0	0
Thurles	Thurles Town	0	2,637	1,000
	Thurles Shopping Centre	0	0	0
Thurles Total		0	2,637	1,000
Other Towns	Ballina/Birdhill	0	0	9,359
	Newport	5,825	1,819	1,824
	Borrisokane	0	0	0
	Templemore	0	0	0
Other Towns Total		5,825	1,819	11,183
North Tipperary County Total		5,825	4,456	14,283

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RETAIL STRATEGY FOR THE
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APPENDIX 5C

**Retail Development Pipeline – Turnover
Estimates at 2016 and 2022**

(A) Retail Development Pipeline: Non-Bulky Comparison Goods (as at March 2009)

<i>Area/Location</i>	<i>Sq M Net</i>	<i>Assumed Sales Density in 2016 (€ per Sq M Net)</i>	<i>Estimated Turnover in 2016 (€ M)</i>	<i>Assumed Sales Density in 2022 (€ per Sq M Net)</i>	<i>Estimated Turnover in 2022 (€ M)</i>
Limerick City Centre	11,880	€7,000	83.2	€7,768	92.3
Limerick – Rest of City	6,488	€7,000	45.4	€7,768	50.4
Crescent Shopping Centre	0	€7,000	0	€7,768	0
Rest of Limerick – Suburbs (Excl. City)	17,721	€7,000	124.0	€7,768	137.7
Rest of Limerick County	0	€7,000	0	€7,768	0
Ennis	1,026	€7,000	7.2	€7,768	8.0
Shannon	3,293	€7,000	23.1	€7,768	25.6
Rest of Clare County	5,457	€7,000	38.2	€7,768	42.4
North Tipperary	16,706	€7,000	116.9	€7,768	129.8
Mid West Total	62,571	€7,000	438.0	€7,768	486.2

(B) Retail Development Pipeline: Bulky Comparison Goods (as at March 2009)

<i>Area/Location</i>	<i>Sq M Net</i>	<i>Assumed Sales Density in 2016 (€ per Sq M Net)</i>	<i>Estimated Turnover in 2016 (€ M)</i>	<i>Assumed Sales Density in 2022 (€ per Sq M Net)</i>	<i>Estimated Turnover in 2022 (€ M)</i>
Limerick City Centre	0	€4,000	0	4,439	0
Limerick – Rest of City	2,295	€4,000	9.2	4,439	10.2
Crescent Shopping Centre	0	€4,000	0	4,439	0
Rest of Limerick – Suburbs (Excl. City)	11,452	€4,000	45.8	4,439	50.8
Rest of Limerick County	0	€4,000	0	4,439	0
Ennis	650	€4,000	2.6	4,439	2.9
Shannon	0	0	0	4,439	0
Rest of Clare County	5,735	€4,000	22.9	4,439	25.5
North Tipperary	8,734	€4,000	34.9	4,439	38.8
Mid West Total	28,866	€4,000	115.4	4,439	128.2

(C) Retail Development Pipeline: Convenience Goods Floorspace (as at March 2009)

<i>Area/Location</i>	<i>Sq M Net</i>	<i>Assumed Sales Density in 2016 (€ per Sq M Net)</i>	<i>Estimated Turnover in 2016 (€ M)</i>	<i>Assumed Sales Density in 2022 (€ per Sq M Net)</i>	<i>Estimated Turnover in 2022 (€ M)</i>
Limerick City Centre	1,980	€10,000	19.8	£10,304	20.4
Limerick – Rest of City	1,980	€10,000	19.8	£10,304	20.4
Crescent Shopping Centre	0	€10,000	0	£10,304	0
Rest of Limerick – Suburb (Excl. City)	10,492	€10,000	104.9	£10,304	108.1
Rest of Limerick County	1,273	€10,000	12.7	£10,304	13.1
Ennis	1,018	€10,000	10.2	£10,304	10.5
Shannon	3,429	€10,000	34.3	£10,304	35.3
Rest of Clare County	2,508	€10,000	25.1	£10,304	25.8
North Tipperary	5,787	€10,000	57.9	£10,304	59.6
Mid West Total	28,467	€10,000	284.7	£10,304	293.3

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APPENDIX 6

**Quantitative Retail Floorspace Need
Assessment**

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APPENDIX 6A
Description of Methodology

REVIEW OF MID WEST RETAIL STRATEGY

Quantitative Retail Floorspace Need Assessment:

Description of Methodology

Objectives

1. This Appendix describes in detail the approach taken to estimate the quantitative need for additional convenience goods and non-bulky and bulky comparison goods floorspace within the Mid West Region as a whole and its constituent Council areas and major centres, which have been agreed with the Councils.
2. The analysis estimates the amount of over/under trading at the base year (2009) by comparing actual (survey-based turnovers) against benchmark turnovers and takes any expenditure “surplus” or “shortfall” into account in determining the available headroom expenditure at the forecast years of 2016 and 2022. This is considered to be a realistic approach, since it reflects the variability in the present retail performance of centres across the Mid West.
3. The assessment provides the following information:-
 - Estimates of total available retail expenditure within the Mid West (and sub areas) at the base year of 2009 and the forecast years of 2016 and 2022 (these years having been agreed with the Councils);
 - Estimates of the retail turnover likely to be ‘retained’ by the Mid West (and sub areas) at each of the forecast years;
 - Estimates of “headroom” expenditure and therefore retail floorspace need within the Mid West (and sub areas) at the forecast years; and

- Quantitative retail floorspace need disaggregated into convenience goods and non-bulky and bulky comparison goods retail floorspace.
4. The results of the need assessment will be used by the Councils to inform retail policies in their new City and County plans. The results should also assist the Councils respond to any emerging retail proposals.

Approach to Retail Floorspace Need

5. The broad approach to estimating the need for (any) additional retail floorspace comprises of seven main steps, which in aggregate cover the three main stages of analysis:
- (i) Forecasting consumer demand;
 - (ii) Forecasting retail supply; and
 - (iii) The conversion of (any) surplus retail expenditure into a retail floorspace requirement.
6. The analysis seeks to be transparent and robust. The assessment is also presented in a way that enables it to be updated in the future as more up-to-date statistics become available and the emerging pattern of shopping activity becomes more established.
7. Separate quantitative retail need assessments for convenience goods and non-bulky and bulky comparison goods have been carried out.

Non-Bulky and Bulky Comparison Goods Floorspace Need Assessment

Step 1: Calculate Total Available Expenditure in the Survey Area

8. The household survey area is shown in **Figure 4.1** in the main report and is defined to encompass the shopping catchment areas of the principal centres in the Mid West Region. Within this area the quantum of available non-bulky and bulky comparison goods expenditure is derived by multiplying (resident) population by average annual expenditure per head on each category of goods (see **Appendix 4B** for the consumer retail spend per head data). This calculation is carried out for each of the 11 zones which comprise the survey area.
9. Population figures by zone and for the survey area as a whole are set out in **Appendices 6B and 6C, Table 1** for non-bulky and bulky comparison goods respectively. In addition to estimates for 2009 (the base year), population projections for 2016 and 2022 are also included.
10. **Appendices 6B and 6C, Table 2** give the average annual expenditure per person on non-bulky and bulky comparison goods respectively for residents living in each of the 11 zones comprising the survey area. The per person expenditure estimates are projected forwards to the forecast years of 2016 and 2022 by adopting 2007 – based expenditure per head forecasts produced for this Review in March 2009. (see **Appendix 4B**).
11. At **Appendices 6B and 6C, Table 3** deductions are made to the per person expenditure estimates to account for retail expenditure which does not take place in shops such as that on mail order shopping, door to door salesmen and market and road-side stalls. This form of expenditure also includes e-tailing and is generally known as “special forms of trading” (SFT).
12. In presenting expenditure forecasts through to 2022, it should be borne in mind that there are currently a number of electronic shopping formats which, should they become more widely established, could reduce significantly the proportion of

retail expenditure that is now spent in conventional shops. The recently published research on the future growth in **e-tailing** expenditure has been reviewed (discussed in Section 5 of the main report) and it has been concluded that SFT is likely to increase as a proportion of total consumer retail expenditure over the period to 2022. This important assumption is built into our quantitative need assessment. However, it should be stressed that this assumption should be reviewed from time to time, since, were it to change significantly, it could have a material impact on future levels of retail floorspace by either reducing or increasing the need for additional shopping provision.

13. The estimates of total available consumer retail expenditure on non-bulky and bulky comparison goods at the base year (2009) are set out in **Appendices 6B and 6C, Table 4** respectively. Forecasts are also given for the forecast years of 2016 and 2022. The increases in available expenditure are due to:-

- The forecast growth in population;
- Real annual increases in consumer comparison goods expenditure per head.

Step 2: Application of “Market Shares” to Determine Amount of Retained Expenditure

14. As a consequence of increases in the volume of consumer expenditure per head running in tandem with population growth, the “pool” of available expenditure on non-bulky comparison goods within the survey area will increase by some €384 million between the base year (2009) and the forecast year of 2016 (**Appendix 6B, Table 4**), whilst by 2022 the growth in available non-bulky comparison goods spend is estimated at €902 million. The comparable increases for bulky comparison goods at 2016 and 2022 are €164 million and €393 million respectively. (**Appendix 6C, Table 4**).

15. However, not all of this growth in consumer expenditure will be spent within the Mid West and is available to support new retail floorspace in the Region. This is because competitor centres to those within the Mid West also lay claim to the

same growing “pool” of expenditure. This requires the “market share” of the Mid West to be calculated.

16. Existing “market shares” for non-bulky and bulky comparison goods shopping have been derived from the household telephone survey carried out in February, 2009. The survey provides useful information on the geographical extent of catchment areas and trade penetration around existing centres by quantifying the pattern and volume of retail expenditure flows from each of the defined zones (where people live and money is generated) to a range of centres and out of centre stores (where people spend their money).
17. In addition, and of **critical** importance, the assessment also takes into account the distribution and volume of locally available consumer expenditure (or spending power) so as to ensure that the **retail turnover estimates are balanced against available retail consumer expenditure.**
18. The base year (2009) pattern of “market shares” generated by the retailing provision within each of the sub areas of the Mid West Region are set out in **Appendices 6B and 6C, Table 5** for non-bulky and bulky comparison goods shopping respectively. These market shares have been produced by amalgamating the individual market shares generated by the separate retail floorspace components making up each sub area (see **Appendix 3E**). The “market shares” are then applied to the 2009 “pools” of available non-bulky and bulky comparison goods expenditure for each sub area (as set out in **Table 5**). **Appendices 6B and 6C, Table 6** give the monetary amounts of non-bulky and bulky comparison goods expenditure flowing to the Mid West Region (and each sub area) by zone. The addition of these expenditure totals for each of the 11 zones gives the total amount of non-bulky and bulky comparison goods spend flowing to each sub area from the survey area as a whole. Allowances are also made (where appropriate) for in-flow expenditure from outside of the survey area, including monies originating from tourists (see **Appendix 4C** for full details).

Step 3: Determine Whether the Existing Retail Economy is Trading at Equilibrium

19. At this stage an assessment is made as to whether the existing non-bulky and bulky comparison goods retail economies of the Mid West (and each of its sub areas) are broadly trading at equilibrium or not. This is important because if the amount of consumer retail expenditure flowing to an area is high in relation to the stock of available retail floorspace and this appears to be causing problems to retailers and / or shoppers, then the area's retail offer may be described as over-trading. Conversely, if the expenditure flows are low relative to available retail floorspace, then this can result in under-trading of the retail offer.
20. If over-trading is occurring in an area (or centre) then it is commonly assumed that the turnover in excess of the equilibrium position is potentially available to support new shopping provision. If this occurs, then this element of expenditure should be added to the headroom expenditure which is later estimated from the future growth in the retail economy. Conversely, if an area (or centre) is under-trading at present, then it is also logical to deduct the amount of turnover shortfall relative to the equilibrium position from the defined headroom expenditures associated with the future growth in the retail economy.
21. The problem with this kind of analysis is determining whether an area (or centre) is trading at equilibrium or not. There are two principal difficulties. First, retailers need to achieve a certain trading level to be viable. However, this trading level varies substantially for individual retailers and for the same retailers for different centres across the country, reflecting differences in type of business, profit margins, site, costs (eg. rents), size, financial structure and other factors. Without detailed financial data on all individual traders in an area it is virtually impossible to determine what the average equilibrium trading level is. The second major difficulty is that even if it can be proven that an area is trading above its retail equilibrium position, this does not automatically mean that problems associated with over-trading occur; these may include retailer operating difficulties, in-store

congestion, over-busy streets leading to pedestrian safety and security problems, and congested car parks.

22. It is difficult to assess whether the Mid West retail economy (and each of its sub areas) is in retail equilibrium at present in relation to non-bulky and bulky comparison goods shopping because of the unavailability of sales floorspace and trading data on individual shops in each centre. Nevertheless, the Review seeks to be as robust as possible, since material conditions of over or under-trading in the base year do suggest there is an under or over-supply of retail floorspace already. To provide an accurate “benchmark” average sales density for a centre or sub area, knowledge of the appropriate sales per square metre of each shop comprising the centre is, in theory, required. Since this information is not available, broad estimates based on a range of criteria have been derived including:-

- published company average sales per sq m for individual retailers;
- the breadth and depth of retailers in a centre;
- the number of multiple traders present;
- the size of a centre (retail floorspace) and its position in the retail hierarchy; and
- rental levels.

23. The benchmark non-bulky and bulky comparison goods turnover estimates for each of the sub areas within the Mid West are set out at **Appendices 6B and 6C, Table 6.**

24. For non-bulky comparison goods shopping, the results of the household telephone survey suggest that the retail floorspace in the Mid West Region as a whole is currently under-trading by around €68 million per year, indicating that the actual turnover is lower than that required for retailers in the area to achieve “benchmark” sales levels. In practice, these assessments are made for each of the constituent sub-areas within the County and any over-or-under trading spends are added or deducted from the forecast headroom expenditures on an area by area basis. In relation to bulky comparison goods shopping, it is

estimated that the existing stock of retail floorspace within the Mid West as a whole is under-trading by some €69 million at the base year of 2009. Comparable assessments are also made for each constituent sub-area and the estimated over or under-trading expenditure totals are taken into account in the later analysis.

25. At **Appendices 6B and 6C, Table 7** the base year market shares are adjusted (where appropriate) to reflect the broad objective of retail policy, which is to support significant new non-bulky comparison goods investment in Limerick City Centre. This important assumption is discussed further in Section 5 of the main report.

Step 4: Calculate Growth in Retained Expenditure through to the Forecast Years

26. Having determined the base year (2009) “market shares” and levels of retained comparison goods expenditure within the Mid West Region as a whole and its constituent sub areas, the principle of market shares is used to calculate how much more spending or trade the Mid West (and its sub areas) could expect to attract in the future as a result of the forecast growth in available expenditure.
27. For each of the forecast years the market shares set out in **Appendices 6B and 6C, Table 7** are applied to the increased “pools” of available non-bulky and bulky comparison goods expenditure in each zone. The calculations for the forecast years of 2016 and 2022 are set out in **Appendices 6B and 6C, Tables 10 and 13** respectively. Due to the increase in demand (as a result of population growth and rising consumer expenditure per head), the assessment produces at 2016 higher retail turnover potentials for the Mid West Region and its constituent sub areas than in the base year (2009). Similarly, the turnover potentials are even higher for the forecast year of 2022.

Step 5: Determine Level of Potential Headroom Expenditure at the Forecast Years

28. It would be wrong to assume that all of the increase in turnover potential within the Mid West Region (and sub areas) will be available by the forecast year(s) to support additional non-bulky and bulky comparison goods shopping. This is because some of the forecast growth in expenditure must be allocated to existing retailers because the evidence confirms that they increase their sales productivities in real terms over time.
29. In **Appendices 6B and 6C, Table 8** the turnover allocations for existing retailers are deducted from the 2016 non-bulky and bulky comparison goods turnover potentials for the Mid West as a whole and each sub area. These calculations produce estimates of residual turnover potential for each sub area and for the Mid West Region. The base year (2009) turnovers are then subtracted from the 2016 residual turnovers to determine the quantum of potential headroom non-bulky and bulky comparison goods expenditure available in 2016 in each sub area and for the Mid West as a whole. A similar analysis is carried out in relation to non-bulky and bulky comparison goods for the forecast year of 2022 in **Appendices 6B and 6C, Table 11**.

Step 6: Determine Level of Residual Headroom Expenditure at the Forecast Years

30. **Appendices 6B and 6C, Table 9** set out the calculations to estimate the residual headroom expenditure for the Mid West Region (and the sub areas) at the forecast year of 2016 for non-bulky and bulky comparison goods floorspace respectively. The same assessments are carried out for the forecast year of 2022 in **Table 12**.
31. The first task is to adjust the potential headroom expenditures calculated for 2016 by taking into account the extent (if any) of any over or under-trading that is occurring within each sub area and in the Mid West as a whole at the base year (2009). This is necessary because the headroom expenditures set out so far assume that the sub areas and the Mid West as a whole are currently trading in retail equilibrium. For reasons already described this assumption may be viewed as unlikely.

32. Despite the difficulties of determining the extent of any over or under-trading within the Mid West and its sub areas, it is considered that including such estimates makes the quantitative need assessment more reliable and robust than ignoring them. Therefore, the over/under-trading estimates determined at **Appendices 6B and 6C, Table 6** are used to “**adjust**” the headroom expenditure totals. In practice, if a sub area is estimated to be under-trading at the present time, this will reduce the quantum of headroom expenditure at the forecast year(s) since some of the growth in expenditure is set-aside to bring the existing retail stock in that area up to a retail equilibrium trading position. Alternatively, if a sub area or centre is over-trading, this will increase the quantum of headroom expenditure at the forecast year(s) since the ‘surplus’ sales are assumed to be available to support additional retail floorspace. **Appendices 6B and 6C, Table 9** set out the calculations for making these adjustments to the 2016 headroom expenditures for non-bulky and bulky comparison goods respectively. **Table 12** repeats the calculations for the forecast year of 2022.
33. At this stage, in order to convert the adjusted headroom expenditures into residual headroom expenditures at the forecast years of 2016 and 2022, further (if applicable) deductions are made to account for that quantum of retail expenditure which is likely to be soaked up by retail floorspace commitments within the Mid West (commitments are retail developments in the pipeline, which are either under construction or have planning consent).
34. From information supplied to us by the Councils, we have produced schedules of non-bulky and bulky comparison goods retail commitments within the Mid West Region disaggregated by sub area. The schedule is reproduced in **Appendix 5C**. The schedule also gives estimates of the retail turnover of each commitment – these are given for each of the forecast years. These turnovers are then deducted from the adjusted headroom expenditure totals for each sub area as appropriate. These calculations are set out in **Appendices 6B and 6C Tables 9 and 12** for the forecast years of 2016 and 2022 respectively.

35. The final residual headroom expenditure totals for the Mid West Region as a whole and its sub areas at the forecast years of 2016 and 2022 are also set out in **Appendices 6B and 6C, Tables 9 and 12** for non-bulky and bulky comparison goods respectively.

Step 7: Estimate Need for Additional Retail Floorspace at the Forecast Years

36. The residual headroom expenditure totals are important because they provide an estimate of the amount of potential turnover which will be available to the Mid West Region as a whole and each of its sub areas by 2016 and 2022. The last step of the assessment is to convert these residual headroom expenditures into requirements for additional non-bulky and bulky comparison goods floorspace. However, the output of this last step is dependent on the application of average sales densities and these, in practice, are likely to vary enormously depending on the type of development that is proposed. For example, town centre stores comprising non-bulky comparison goods shopping typically trade at much higher average sales densities than retail warehouse style developments selling mainly bulky comparison goods. We would therefore recommended that appropriate weight is attached to the **residual headroom expenditure** totals, since these are not open to the same levels of interpretation as are the retail floorspace requirements set out in Section 5 of the main report.

Convenience Goods Floorspace Need Assessment

37. The retail need assessment for convenience goods floorspace follows the same approach as that for non-bulky and bulky comparison goods. The detailed calculations underpinning the analysis are reproduced in full in **Appendix 6D, Tables 1 to 16** inclusive.

Step 1: Calculate Total Available Expenditure in the Catchment Area

38. At **Appendix 6D, Tables 1 to 4** inclusive, the total available convenience goods expenditure by zone is determined for the base year (2009) and the forecast

years of 2016 and 2022. The analysis incorporates 2007 estimates of average annual spending per head on convenience goods within each zone, together with expenditure growth forecasts for the Mid West Region. Expenditure by “special forms of trading” is again excluded, although the allowance is much less than for comparison goods shopping.

Step 2: Application of “Market Shares” to Determine Amount of Retained Expenditure

39. Using the results of the household telephone survey the base year (2009) market shares for the Mid West Region and its sub areas are derived within each of the 11 zones¹. This assessment is set out in **Appendix 6D, Table 5**. Applying the market shares to the total “pools” of available expenditure within each zone in the base year (2009) (**Table 6**), gives the monetary flows of consumer spending from each of the 11 zones to the Mid West and its sub areas. As for comparison goods, an allowance is made for in-flow expenditure into the Mid West from tourists, although the amount is much less. The addition of the flows from each zone, together with the in-flow spend from tourists, gives the total estimated convenience goods turnover of the Mid West Region as a whole and its constituent sub areas at the base year of 2009.

Step 3: Determine Whether Existing Retail Economy is Trading at Equilibrium

40. For convenience goods shopping, the analysis carried out earlier in relation to non-bulky and bulky comparison goods is replicated, and the extent of any over or under-trading within the Mid West and its sub areas at the base year (2009) is calculated. In estimating the equilibrium convenience goods retail turnover in the base year the overall quantity, quality and location of the existing retail offer in each sub area has been taken into account. The benchmark turnovers are based on published sales densities for major retailers and on professional

¹ This involves grouping together the expenditure flows to individual named food stores in order to establish the overall market share of a centre and/or sub area.

judgement. **Appendix 6D, Table 6** confirms that the existing convenience goods floorspace in the Mid West as a whole is under-trading by €151 million in the base year (2009).

Step 4: Calculate Growth in Retained Expenditure through to the Forecast Years

41. Unlike for non-bulky comparison goods there is no justification for adjusting any of the convenience goods market shares in the Mid West Region going forwards. It is considered that this approach is consistent with sustainability objectives to reduce the number and distance of car journeys for shopping. **Appendix 6D, Table 7** sets out the market shares which are later applied to the pools of available expenditure at both of the design years. These calculations are set out in **Tables 8** and **11** for the forecast years of 2016 and 2022 respectively.

Step 5: Determine Level of Potential Headroom Expenditure at the Forecast Years

42. At **Appendix 6D, Tables 9** and **12** the levels of potential headroom expenditure within the Mid West and its constituent sub areas are determined at the forecast years of 2016 and 2022 respectively. As for non-bulky and bulky comparison goods, it is necessary to set aside a little of the expenditure growth for existing retailers to account for their real gains in sales productivity over time.

Step 6: Determine Level of Residual Headroom Expenditure at the Forecast Years

43. To convert the potential headroom expenditure figures into residual headroom expenditure estimates, account is taken of any under/over-trading that currently exists in the Mid West Region and its sub areas in the base year (2009). Where under-trading exists, some of the expenditure growth is set aside to bring the existing retail offer up to a retail equilibrium trading position. For any over-trading, the surplus spend is added to the headroom expenditure determined later on in the assessment.

44. The adjusted headroom expenditure totals for the Mid West as a whole and each sub area for the forecast years of 2016 and 2022 are set out in **Appendix 6D, Tables 10 and 13** respectively.
45. Lastly, account is taken of any existing convenience goods commitments within the Mid West Region. Full details of the retail commitments, including estimated turnovers, are set out in **Appendix 5C**. The calculations to produce the residual headroom expenditure totals for the forecast years of 2016 and 2022 are set out in **Appendix 6D, Tables 10 and 13** respectively.

Step 7: Estimate Need for Additional Retail Floorspace at the Forecast Years

46. The adjusted residual headroom expenditures may be converted into retail floorspace requirements but, as with non-bulky and bulky comparison goods, the floorspace estimates are entirely dependent on the average sales density applied to the floorspace. For this reason, it is recommended that appropriate weight is attached to the forecast quantum of residual expenditure available at the forecast years in relation to convenience goods.

Summary

47. The purpose of this Appendix has been to describe the approach taken to assess in quantitative terms the likely retail expenditure capacity for additional non-bulky and bulky comparison goods and convenience goods floorspace within the Mid West and its sub areas through to 2022. It must be stressed, however, that any quantitative analysis over such a long time-period (13 years from the base year of 2009) may be subject to a significant margin of error, particularly in the later years, since it is based on a number of assumptions which are difficult to forecast accurately. In addition, there are two further key assumptions which have a material bearing on the forecast levels of residual headroom expenditure. These are as follows:

- **Special forms of trading** – conservative forecasts have been assumed for the growth in non-store retail sales through to 2022. However, if actual growth were to exceed these rates, which is entirely possible, then the projected levels of retail floorspace need would be **less** than those forecast in this report. Alternatively, if actual SFT growth was less than has been forecast, then the quantum of floorspace need will be **more** than set out in this report.
- **Over / Under Trading at the base year** – the household survey results indicate that the Mid West Region as a whole is currently under-trading in all three broad categories of goods. This has been taken into account in the quantitative need assessment. If the amount of under-trading has been over-estimated then the need estimates will be higher, whilst if the amount of under-trading has been under-estimated then the levels of need will be lower.

DRAFT
RETAIL STRATEGY FOR THE
MID WEST REGION
2010-2016

APPENDIX 6B

**The Need for Additional Non-Bulky
Comparison Goods Floorspace**

**RETAIL FLOORSPACE NEED ASSESSMENT: NON BULKY COMPARISON GOODS
(INCORPORATING ESTIMATES OF (ANY) UNDER / OVER TRADING AT THE BASE YEAR, 2009)**

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TABLE 13 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2022

TABLE 1 - POPULATION CHANGE BY ZONE					
Zone	2009 Population (Base Year)	2016 Population	2022 Population	Total Increase (2009-2022)	Percentage Increase (2009-2022)
Zone 1	21,836	26,652	30,779	8,943	41.0%
Zone 2	20,909	24,797	28,129	7,220	34.5%
Zone 3	19,365	24,034	28,035	8,670	44.8%
Zone 4	70,341	79,577	87,494	17,153	24.4%
Zone 5	36,887	40,208	43,055	6,168	16.7%
Zone 6	20,821	22,465	23,873	3,052	14.7%
Zone 7	46,016	49,864	53,162	7,146	15.5%
Zone 8	56,444	64,873	72,099	15,655	27.7%
Zone 9	12,796	14,188	15,381	2,585	20.2%
Zone 10	68,585	75,121	80,723	12,138	17.7%
Zone 11	46,472	51,811	54,786	8,314	17.7%
TOTAL	420,472	473,590	517,516	97,044	23.1%

Notes:

Population projections for zones 1 to 10 (within the Mid West Region) have been prepared by Limerick City Council, whilst the population projections for Zone 11 (South Tipperary, South East Region) is derived from CSO data (see Appendix 4A for full details).

TABLE 2 - EXPENDITURE ON NON BULKY COMPARISON GOODS PER HEAD OF POPULATION BY ZONE (INCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)

Zone	Expenditure Per Head (€) ⁽¹⁾					
	2007	2009 (Base Year)	2016	2022	Increase (€) (2009-2022)	Increase % (2009-2022)
Zone 1	2,138	2,094	2,843	3,806	1,712	81.8%
Zone 2	2,138	2,094	2,843	3,806	1,712	81.8%
Zone 3	2,138	2,094	2,843	3,806	1,712	81.8%
Zone 4	2,138	2,094	2,843	3,806	1,712	81.8%
Zone 5	2,138	2,094	2,843	3,806	1,712	81.8%
Zone 6	2,138	2,094	2,843	3,806	1,712	81.8%
Zone 7	2,138	2,094	2,843	3,806	1,712	81.8%
Zone 8	2,138	2,094	2,843	3,806	1,712	81.8%
Zone 9	2,138	2,094	2,843	3,806	1,712	81.8%
Zone 10	2,138	2,094	2,843	3,806	1,712	81.8%
Zone 11	2,138	2,094	2,843	3,806	1,712	81.8%

Notes:

(1) Average consumer expenditure per head on non bulky comparison goods for 2007 has been estimated by Oxford Economics for the Mid West Region. The 2007 expenditure per head figures in each zone have been projected forwards to 2009 (the base year) and the forecast years of 2016 and 2022 by using expenditure per head growth rates for the Mid West produced by Oxford Economics for this Review (See Appendix 4B).

TABLE 3 - EXPENDITURE ON NON BULKY COMPARISON GOODS PER HEAD OF POPULATION BY ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)					
Zone	Expenditure Per Head (€) ⁽¹⁾				
	2009 (Base Year)	2016	2022	Increase (€) (2009-2022)	Increase % (2009-2022)
Zone 1	1,889	2,488	3,277	1,388	73.5%
Zone 2	1,889	2,488	3,277	1,388	73.5%
Zone 3	1,889	2,488	3,277	1,388	73.5%
Zone 4	1,889	2,488	3,277	1,388	73.5%
Zone 5	1,889	2,488	3,277	1,388	73.5%
Zone 6	1,889	2,488	3,277	1,388	73.5%
Zone 7	1,889	2,488	3,277	1,388	73.5%
Zone 8	1,889	2,488	3,277	1,388	73.5%
Zone 9	1,889	2,488	3,277	1,388	73.5%
Zone 10	1,889	2,488	3,277	1,388	73.5%
Zone 11	1,889	2,488	3,277	1,388	73.5%

Notes:

(1) Expenditure per head on non bulky comparison goods has been discounted by 9.8% (over the figures in Table 2) for the base year of 2009, to exclude non store retail sales which includes e-tailing. At 2016 and 2022, discounts of 12.5% and 13.9% have been assumed. The SFT percentages for the Mid West are based on research carried out by Experian in the UK but adjusted to reflect the retail economy of the region.

TABLE 4 - TOTAL AVAILABLE NON BULKY COMPARISON GOODS BY EXPENDITURE ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)					
Zone	Total Available Expenditure (€m) ⁽¹⁾				
	2009 (Base Year)	2016	2022	Increase (€) (2009-2022)	Increase % (2009-2022)
Zone 1	41.2	66.3	100.9	59.6	144.6%
Zone 2	39.5	61.7	92.2	52.7	133.4%
Zone 3	36.6	59.8	91.9	55.3	151.2%
Zone 4	132.9	198.0	286.7	153.9	115.8%
Zone 5	69.7	100.0	141.1	71.4	102.5%
Zone 6	39.3	55.9	78.2	38.9	98.9%
Zone 7	86.9	124.0	174.2	87.3	100.5%
Zone 8	106.6	161.4	236.3	129.7	121.6%
Zone 9	24.2	35.3	50.4	26.2	108.6%
Zone 10	129.5	186.9	264.5	135.0	104.2%
Zone 11	87.8	128.9	179.5	91.8	104.6%
TOTAL	794.2	1178.1	1696.0	901.8	113.6%

Notes:

(1) Total available expenditure totals for non bulky comparison goods are calculated as follows: Population (Table 1) multiplied by consumer expenditure per head after making appropriate reductions for SFT (Table 3).

TABLE 5 - NON BULKY COMPARISON GOODS CENTRE MARKET SHARES BY ZONE IN THE BASE YEAR, 2009 (COLUMN PERCENT)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											
	Survey Area											
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	
WITHIN MID WEST												
Limerick - City Centre	59.6	60.3	59.6	76.9	40.4	15.4	51.3	6.1	8.3	9.2	6.2	
Limerick - Rest of City	30.6	24.1	18.1	4.5	0.0	7.3	3.1	1.0	0.0	0.0	0.0	
SUB TOTAL: LIMERICK CITY	90.1	84.4	77.7	81.3	40.4	22.7	53.2	7.1	8.3	9.2	6.2	
Crescent Shopping Centre	6.2	10.5	17.2	15.7	13.4	38.8	13.0	11.6	8.2	10.9	11.5	
Rest of Limerick - Suburbs (excludes City)	0.0	0.0	1.8	1.5	3.1	0.0	0.4	0.0	0.0	0.0	0.0	
Rest of County	1.0	0.0	0.0	0.0	26.1	12.8	0.0	0.0	0.0	0.0	0.0	
SUB TOTAL: LIMERICK COUNTY	7.2	10.5	19.0	17.2	42.6	51.6	13.4	11.6	8.2	10.9	11.5	
Ennis	0.0	0.0	0.0	0.0	0.0	0.0	15.7	62.2	72.2	0.0	0.0	
Shannon	0.0	0.0	0.0	0.0	0.0	0.0	5.7	2.0	0.0	0.0	0.0	
Rest of County	0.0	0.0	0.0	0.0	0.0	0.0	6.6	12.3	1.6	0.0	0.0	
SUB TOTAL: CLARE COUNTY	0.0	0.0	0.0	0.0	0.0	0.0	28.0	76.5	73.8	0.0	0.0	
SUB TOTAL: NORTH TIPPERARY	0.0	0.0	0.0	0.0	0.0	0.0	2.3	0.0	0.0	69.4	10.9	
SUB TOTAL: MID WEST	97.3	94.9	96.7	98.5	83.1	74.3	96.9	95.3	90.3	89.6	28.7	
OUTSIDE MID WEST												
All Centres / Stores	2.7	5.1	3.3	1.5	16.9	25.7	3.1	4.7	9.7	10.4	71.3	
SUB TOTAL	2.7	5.1	3.3	1.5	16.9	25.7	3.1	4.7	9.7	10.4	71.3	
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	

Notes:

The market share percentages are derived from the household telephone survey carried out within the Mid West between 23 February and 8 March, 2009. A more detailed breakdown of market shares is given in Appendix 3E.

TABLE 6 - ESTIMATED NON BULKY COMPARISON GOODS EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES IN THE BASE YEAR, 2009 (€ MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)												TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-11)	Estimated Inflow Expenditure (Toursits) ⁽¹⁾	Total Non Bulky Goods Turnover	Non Bulky Goods Floorspace (sq.m. net) ⁽²⁾	Average Sales Density (€ per sq.m. net)	Benchmark Average Sales Density (€ per sq.m net) ⁽³⁾	Benchmark Non Bulky Goods Turnover (€m)	Extent of Any Over / Under Trading (€m)
	Study Area																				
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	A									
WITHIN MID WEST																					
Limerick - City Centre	24.6	23.8	21.8	102.1	28.2	6.1	44.6	6.5	2.0	12.0	5.4	277.0	277.0	26.3	303.3	50,350	6,025	6,250	314.7	-11.3	
Limerick - Rest of City	12.6	9.5	6.6	5.9	0.0	2.9	2.7	1.1	0.0	0.0	0.0	41.4	41.4	3.9	45.3	29,531	1,533	3,500	103.4	-58.1	
SUB TOTAL: LIMERICK CITY	37.2	33.3	28.4	108.1	28.2	8.9	46.3	7.6	2.0	12.0	5.4	317.4	317.4	30.2	347.6	79,881	4,352	-	418.0	-70.4	
Crescent Shopping Centre	2.6	4.2	6.3	20.8	9.3	15.3	11.3	12.4	2.0	14.2	10.1	108.4	108.4	10.4	118.8	17,595	6,752	6,500	114.4	4.4	
Rest of Limerick - Suburbs (excludes City)	0.0	0.0	0.7	2.0	2.2	0.0	0.3	0.0	0.0	0.0	0.0	5.1	5.1	0.4	5.5	9,329	593	3,500	32.7	-27.1	
Rest of County	0.4	0.0	0.0	0.0	18.2	5.0	0.0	0.0	0.0	0.0	0.0	23.6	23.6	2.2	25.8	16,833	1,535	3,000	50.5	-24.7	
SUB TOTAL: LIMERICK COUNTY	3.0	4.2	7.0	22.8	29.7	20.3	11.6	12.4	2.0	14.2	10.1	137.2	137.2	13.0	150.2	43,757	3,432	-	197.5	-47.3	
Ennis	0.0	0.0	0.0	0.0	0.0	0.0	13.6	66.4	17.4	0.0	0.0	97.4	97.4	25.6	123.0	13,783	8,927	5,000	68.9	54.1	
Shannon	0.0	0.0	0.0	0.0	0.0	0.0	4.9	2.2	0.0	0.0	0.0	7.1	7.1	1.9	9.0	2,382	3,789	4,000	9.5	-0.5	
Rest of County	0.0	0.0	0.0	0.0	0.0	0.0	5.7	13.1	0.4	0.0	0.0	19.2	19.2	4.9	24.1	8,519	2,828	3,000	25.6	-1.5	
SUB TOTAL: CLARE COUNTY	0.0	0.0	0.0	0.0	0.0	0.0	24.3	81.6	17.8	0.0	0.0	123.8	123.8	32.4	156.2	24,684	6,326	-	104.0	52.2	
NORTH TIPPERARY	0.0	0.0	0.0	0.0	0.0	0.0	2.0	0.0	0.0	89.9	9.6	101.5	101.5	3.6	105.1	30,689	3,426	3,500	107.4	-2.3	
SUB TOTAL: MID WEST	40.1	37.5	35.4	130.9	57.9	29.2	84.2	101.6	21.8	116.1	25.2	679.9	679.9	79.2	759.1	179,011	4,240	-	827.0	-67.9	
OUTSIDE MID WEST																					
All Centres / Stores	1.1	2.0	1.2	2.0	11.8	10.1	2.7	5.0	2.4	13.4	62.6	114.3									
SUB TOTAL	1.1	2.0	1.2	2.0	11.79	10.12	2.7	5.0	2.4	13.45	62.62	114.3									
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	41.2	39.5	36.6	132.9	69.7	39.3	86.9	106.6	24.2	129.5	87.8	794.2									

Notes:

- 1) Estimated by Colliers CRE (Appendix 4C).
- 2) Floorspace estimates provided by the Councils (Appendix 5B).
- 3) Benchmark sales densities estimated by Colliers CRE (See Section 5 of main report).

**TABLE 7 - ADJUSTED NON BULKY COMPARISON GOODS CENTRE MARKET SHARES BY ZONE AT DESIGN YEARS
(COLUMN PERCENT)**

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											
	Study Area											
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	
WITHIN MID WEST												
Limerick - City Centre	75.0	75.0	75.0	75.0	50.0	30.0	70.0	15.0	15.0	15.0	15.0	
Limerick - Rest of City	19.5	16.0	10.2	5.0	0.0	5.0	1.5	0.8	0.0	0.0	0.0	
SUB TOTAL: LIMERICK CITY	94.5	91.0	85.2	80.0	50.0	35.0	71.5	15.8	15.0	15.0	15.0	
Crescent Shopping Centre	4.0	7.0	12.0	17.0	11.5	34.0	8.0	10.0	7.0	10.0	9.0	
Rest of Limerick - Suburbs (excludes City)	0.0	0.0	1.0	1.5	2.5	0.0	0.0	0.0	0.0	0.0	0.0	
Rest of County	0.0	0.0	0.0	0.0	23.0	11.0	0.0	0.0	0.0	0.0	0.0	
SUB TOTAL: LIMERICK COUNTY	4.0	7.0	13.0	18.5	37.0	45.0	8.0	10.0	7.0	10.0	9.0	
Ennis	0.0	0.0	0.0	0.0	0.0	0.0	9.0	59.4	70.5	0.0	0.0	
Shannon	0.0	0.0	0.0	0.0	0.0	0.0	4.5	1.8	0.0	0.0	0.0	
Rest of County	0.0	0.0	0.0	0.0	0.0	0.0	5.0	11.0	1.5	0.0	0.0	
SUB TOTAL: CLARE COUNTY	0.0	0.0	0.0	0.0	0.0	0.0	18.5	72.2	72.0	0.0	0.0	
NORTH TIPPERARY	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0	0.0	67.0	8.9	
SUB TOTAL: MID WEST	98.5	98.0	98.2	98.5	87.0	80.0	99.0	98.0	94.0	92.0	32.9	
OUTSIDE MID WEST												
All Centres / Stores	1.5	2.0	1.8	1.5	13.0	20.0	1.0	2.0	6.0	8.0	67.1	
SUB TOTAL	1.5	2.0	1.8	1.5	13.0	20.0	1.0	2.0	6.0	8.0	67.1	
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	

Notes:

The market shares in this table are adjusted upwards from those set out in Table 5 to reflect the planning aspirations to strengthen Limerick City Centre in retail terms.

TABLE 8 - NON BULKY GOODS COMPARISON EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES, 2016 (€ MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)												TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-11) A	Estimated Inflow Expenditure (Tourists) ⁽¹⁾ B	Total Non Bulky Goods Turnover C = A + B	
	Study Area																
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11						
WITHIN MID WEST																	
Limerick - City Centre	49.7	46.3	44.8	148.5	50.0	16.8	86.8	24.2	5.3	28.0	19.3	519.8	519.8	29.6	549.4		
Limerick - Rest of City	12.9	9.9	6.1	9.9	0.0	2.8	1.9	1.3	0.0	0.0	0.0	44.7	44.7	4.4	49.1		
SUB TOTAL: LIMERICK CITY	62.7	56.1	50.9	158.4	50.0	19.6	88.7	25.5	5.3	28.0	19.3	564.5	564.5	34.0	598.5		
Crescent Shopping Centre	2.7	4.3	7.2	33.7	11.5	19.0	9.9	16.1	2.5	18.7	11.6	137.1	137.1	11.7	148.8		
Rest of Limerick - Suburbs (excludes City)	0.0	0.0	0.6	3.0	2.5	0.0	0.0	0.0	0.0	0.0	0.0	6.1	6.1	0.5	6.6		
Rest of County	0.0	0.0	0.0	0.0	23.0	6.1	0.0	0.0	0.0	0.0	0.0	29.2	29.2	2.5	31.7		
SUB TOTAL: LIMERICK COUNTY	2.7	4.3	7.8	36.6	37.0	25.1	9.9	16.1	2.5	18.7	11.6	172.3	172.3	14.7	187.0		
Ennis	0.0	0.0	0.0	0.0	0.0	0.0	11.2	95.9	24.9	0.0	0.0	131.9	131.9	28.8	160.7		
Shannon	0.0	0.0	0.0	0.0	0.0	0.0	5.6	2.9	0.0	0.0	0.0	8.5	8.5	2.1	10.6		
Rest of County	0.0	0.0	0.0	0.0	0.0	0.0	6.2	17.8	0.5	0.0	0.0	24.5	24.5	5.5	30.0		
SUB TOTAL: CLARE COUNTY	0.0	0.0	0.0	0.0	0.0	0.0	22.9	116.5	25.4	0.0	0.0	164.9	164.9	36.4	201.3		
NORTH TIPPERARY	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.0	125.2	11.5	137.9	137.9	4.1	142.0		
SUB TOTAL: MID WEST	65.3	60.5	58.7	195.0	87.0	44.7	122.8	158.2	33.2	171.9	42.4	1039.6	1039.6	89.2	1128.8		
OUTSIDE MID WEST																	
All Centres / Stores	1.0	1.2	1.1	3.0	13.0	11.2	1.2	3.2	2.1	14.9	86.5	138.5					
SUB TOTAL	1.0	1.2	1.1	3.0	13.0	11.2	1.2	3.2	2.1	14.9	86.5	138.5					
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	66.3	61.7	59.8	198.0	100.0	55.9	124.0	161.4	35.3	186.9	128.9	1178.1					

Notes:

For each cell, the monetary figure is derived by multiplying the 2016 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the convenience goods market share of the specific centre.
 (1) Estimated by Colliers CRE (see Appendix 4C).

TABLE 9 - CALCULATION OF POTENTIAL NON BULKY COMPARISON GOODS HEADROOM EXPENDITURE, 2016 (€MILLION)

Centre	2009 Turnover	2016 Turnover Potential	Turnover Allocation for Existing Retailers 2009-2016	Residual Turnover Potential by 2016	Potential Headroom Expenditure by 2016
	A	B	C ⁽¹⁾	D = B - C	E = D - A
	(Table 6, C)	(Table 8, C)			
WITHIN MID WEST					
Limerick - City Centre	303.3	549.4	40.6	508.7	205.4
Limerick - Rest of City	45.3	49.1	13.3	35.8	-9.5
SUB TOTAL: LIMERICK CITY	347.6	598.5	54.0	544.5	196.9
Crescent Shopping Centre	118.8	148.8	14.8	134.1	15.2
Rest of Limerick - Suburbs (excludes City)	5.5	6.6	4.2	2.4	-3.2
Rest of County	25.8	31.7	6.5	25.1	-0.7
SUB TOTAL: LIMERICK COUNTY	150.2	187.0	25.5	161.5	11.4
Ennis	123.0	160.7	8.9	151.8	28.8
Shannon	9.0	10.6	1.2	9.4	0.3
Rest of County	24.1	30.0	3.3	26.7	2.6
SUB TOTAL: CLARE COUNTY	156.2	201.3	13.4	187.8	31.7
NORTH TIPPERARY	105.1	142.0	13.9	128.1	23.0
TOTAL: MID WEST	759.1	1,128.8	106.8	1,022.1	263.0

Notes:
 (1) We assume that all existing non bulky comparison goods floorspace at the base year (2009) will achieve a real sales productivity gain of 1.75% per annum. This figure is based on in-depth research carried out by Experian in the UK (See Section 5 in the main report), with an adjustment to reflect the retail economy of the Mid West and the planning aspirations of the Councils. The sales productivity gains are applied to the estimated 2009 benchmark non bulky goods turnover of each centre as set out in Table 6 (Column G).

TABLE 10 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2016

Centre	Potential Headroom Expenditure by 2016 (€m)	Adjustment for Over / Under Trading in Base Year (€m)	Adjusted Headroom Expenditure by 2016 (€m)	Reduction in Expenditure due to Non Bulky Goods Floorspace Commitments (as at March 2009) ⁽¹⁾	Adjusted Residual Headroom Expenditure by 2016 (€m)	Assumed Sales Density in 2016 ⁽²⁾ (€per sq.m net)	Estimated Retail Floorspace Need in 2016 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 9, E)	(Table 6, H)					
WITHIN MID WEST							
Limerick - City Centre	205.4	-11.3	194.0	83.2	110.8	7,000	15,836
Limerick - Rest of City	-9.5	-58.1	-67.6	45.4	-113.0	7,000	-16,138
SUB TOTAL: LIMERICK CITY	196.9	-70.4	126.5	128.6	-2.1	-	-302
Crescent Shopping Centre	15.2	4.4	19.7	0.0	19.7	7,000	2,812
Rest of Limerick - Suburbs (excludes City)	-3.2	-27.1	-30.3	124.0	-154.3	7,000	-22,043
Rest of County	-0.7	-24.7	-25.4	0.0	-25.4	7,000	-3,624
SUB TOTAL: LIMERICK COUNTY	11.4	-47.3	-36.0	124.0	-160.0	-	-22,855
Ennis	28.8	54.1	82.9	7.2	75.7	7,000	10,813
Shannon	0.3	-0.5	-0.2	23.1	-23.3	7,000	-3,325
Rest of County	2.6	-1.5	1.1	38.2	-37.1	7,000	-5,296
SUB TOTAL: CLARE COUNTY	31.7	52.2	83.8	68.5	15.3	-	2,192
NORTH TIPPERARY	23.0	-2.3	20.7	116.9	-96.2	7,000	-13,738
TOTAL	263.0	-67.9	195.1	438.0	-242.9		-34,702

Notes:
(1) Details and estimated 2016 turnovers of non bulky comparison goods floorspace commitments by zone are set out in Appendix 5C.
(2) The derivation of our 2016 benchmark centre sales density estimates are set out in Section 5 of the main report.

TABLE 11 - NON BULKY COMPARISON GOODS EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES, 2022 (€MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-11) A	Estimated Inflow Expenditure (Tourists) ⁽¹⁾ B	Total Non Bulky Goods Turnover C = A + B		
	Study Area																
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11						
WITHIN MID WEST																	
Limerick - City Centre	75.7	69.2	68.9	215.0	70.6	23.5	121.9	35.4	7.6	39.7	26.9	754.3	754.3	33.4	787.7		
Limerick - Rest of City	19.7	14.8	9.4	14.3	0.0	3.9	2.6	1.9	0.0	0.0	0.0	66.5	66.5	5.0	71.5		
SUB TOTAL: LIMERICK CITY	95.4	83.9	78.3	229.4	70.6	27.4	124.6	37.3	7.6	39.7	26.9	820.9	820.9	38.4	859.3		
Crescent Shopping Centre	4.0	6.5	11.0	48.7	16.2	26.6	13.9	23.6	3.5	26.5	16.2	196.8	196.8	13.2	210.0		
Rest of Limerick - Suburbs (excludes City)	0.0	0.0	0.9	4.3	3.5	0.0	0.0	0.0	0.0	0.0	0.0	8.7	8.7	0.5	9.2		
Rest of County	0.0	0.0	0.0	0.0	32.5	8.6	0.0	0.0	0.0	0.0	0.0	41.1	41.1	2.8	43.9		
SUB TOTAL: LIMERICK COUNTY	4.0	6.5	11.9	53.0	52.2	35.2	13.9	23.6	3.5	26.5	16.2	246.6	246.6	16.5	263.1		
Ennis	0.0	0.0	0.0	0.0	0.0	0.0	15.7	140.4	35.5	0.0	0.0	191.6	191.6	32.5	224.1		
Shannon	0.0	0.0	0.0	0.0	0.0	0.0	7.8	4.3	0.0	0.0	0.0	12.1	12.1	2.4	14.5		
Rest of County	0.0	0.0	0.0	0.0	0.0	0.0	8.7	26.0	0.8	0.0	0.0	35.5	35.5	6.2	41.7		
SUB TOTAL: CLARE COUNTY	0.0	0.0	0.0	0.0	0.0	0.0	32.2	170.6	36.3	0.0	0.0	239.1	239.1	41.1	280.2		
NORTH TIPPERARY	0.0	0.0	0.0	0.0	0.0	0.0	1.7	0.0	0.0	177.2	16.0	194.9	194.9	4.6	199.5		
SUB TOTAL: MID WEST	99.4	90.4	90.2	282.4	122.8	62.6	172.5	231.6	47.4	243.3	59.1	1501.5	1501.5	100.6	1602.1		
OUTSIDE MID WEST																	
All Centres / Stores	1.5	1.8	1.7	4.3	18.3	15.6	1.7	4.7	3.0	21.2	120.5	194.4					
SUB TOTAL	1.5	1.8	1.7	4.3	18.3	15.6	1.7	4.7	3.0	21.2	120.5	194.4					
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	100.9	92.2	91.9	286.7	141.1	78.2	174.2	236.3	50.4	264.5	179.5	1696.0					

Notes:
 For each cell, the monetary figure is derived by multiplying the 2022 available non bulky comparison goods expenditure in the zone (excl. SFT) (Table 4) by non bulky comparison goods market share of the specific centre in that zone (Table 7).
 (1) Estimated by Colliers CRE (see Appendix 4C).

TABLE 12 - CALCULATION OF POTENTIAL NON BULKY COMPARISON GOODS HEADROOM EXPENDITURE, 2022 (€MILLION)

Centre	2009 Turnover	2022 Turnover Potential	Turnover Allocation for Existing Retailers 2009-2022	Residual Turnover Potential by 2022	Potential Headroom Expenditure by 2022
	A	B	C ⁽¹⁾	D = B - C	E = D - A
	(Table 6, C)	(Table 11, C)			
WITHIN MID WEST					
Limerick - City Centre	303.3	787.7	79.6	708.1	404.8
Limerick - Rest of City	45.3	71.5	26.1	45.4	0.1
SUB TOTAL: LIMERICK CITY	347.6	859.3	105.8	753.5	405.9
Crescent Shopping Centre	118.8	210.0	28.9	181.0	62.2
Rest of Limerick - Suburbs (excludes City)	5.5	9.2	8.3	1.0	-4.5
Rest of County	25.8	43.9	12.8	31.1	5.2
SUB TOTAL: LIMERICK COUNTY	150.2	263.1	50.0	213.1	62.9
Ennis	123.0	224.1	17.4	206.6	83.6
Shannon	9.0	14.5	2.4	12.1	3.1
Rest of County	24.1	41.7	6.5	35.2	11.1
SUB TOTAL: CLARE COUNTY	156.2	280.2	26.3	253.9	97.8
NORTH TIPPERARY	105.1	199.5	27.2	172.4	67.2
TOTAL	759.1	1,602.1	209.2	1,392.9	633.8

Notes:

(1) We assume that all existing non bulky comparison goods floorspace at the base year (2009) will achieve a real sales productivity gain of 1.75% per annum. This figure is based on in-depth research carried out by Experian in the UK (See Section 5 in the main report), with an adjustment to reflect the retail economy of the Mid West and the planning aspirations of the Councils. The sales productivity gains are applied to the estimated 2009 benchmark non-bulky comparison goods turnover for each centre as set out in Table 6 (column G).

TABLE 13 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2022

Centre	Potential Headroom Expenditure by 2022 (€m)	Adjustment for Over / Under Trading in Base Year (€m)	Adjusted Headroom Expenditure by 2022 (€m)	Reduction in Expenditure due to Non Bulky Goods Floorspace Commitments (as at March 2009) ⁽¹⁾	Adjusted Residual Headroom Expenditure by 2021 (€m)	Assumed Sales Density in 2022 ⁽²⁾ (€per sq.m net)	Estimated Retail Floorspace Need in 2022 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 12, E)	(Table 6, H)					
WITHIN MID WEST							
Limerick - City Centre	404.8	-11.3	393.4	92.3	301.1	7,768	38,766
Limerick - Rest of City	0.1	-58.1	-58.0	50.4	-108.4	7,768	-13,949
SUB TOTAL: LIMERICK CITY	405.9	-70.4	335.5	142.7	192.8	-	24,817
Crescent Shopping Centre	62.2	4.4	66.7	0.0	66.7	7,768	8,583
Rest of Limerick - Suburbs (excludes City)	-4.5	-27.1	-31.7	137.7	-169.4	7,768	-21,803
Rest of County	5.2	-24.7	-19.4	0.0	-19.4	7,768	-2,500
SUB TOTAL: LIMERICK COUNTY	62.9	-47.3	15.6	137.7	-122.1	-	-15,720
Ennis	83.6	54.1	137.7	8.0	129.7	7,768	16,700
Shannon	3.1	-0.5	2.6	25.6	-23.0	7,768	-2,967
Rest of County	11.1	-1.5	9.6	42.4	-32.8	7,768	-4,218
SUB TOTAL: CLARE COUNTY	97.8	52.2	149.9	76.0	73.9	-	9,515
NORTH TIPPERARY	67.2	-2.3	65.0	129.8	-64.8	7,768	-8,348
TOTAL	633.8	-67.9	565.9	486.2	79.7		10,264

Notes:
(1) Details and estimated 2022 turnovers of non bulky comparison goods floorspace commitments by zone are set out in Appendix 5C.
(2) The derivation of our 2022 benchmark centre sales density estimates are set out in Section 5 of the main report.

DRAFT
RETAIL STRATEGY FOR THE
MID WEST REGION
2010-2016

APPENDIX 6C

**The Need for Additional Bulky Comparison
Goods Floorspace**

**RETAIL FLOORSPACE NEED ASSESSMENT: BULKY COMPARISON GOODS
(INCORPORATING ESTIMATES OF (ANY) UNDER / OVER TRADING AT THE BASE YEAR, 2009)**

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TABLE 1 - POPULATION CHANGE BY ZONE					
Zone	2009 Population (Base Year)	2016 Population	2022 Population	Total Increase (2009-2022)	Percentage Increase (2009-2022)
Zone 1	21,836	26,652	30,779	8,943	41.0%
Zone 2	20,909	24,797	28,129	7,220	34.5%
Zone 3	19,365	24,034	28,035	8,670	44.8%
Zone 4	70,341	79,577	87,494	17,153	24.4%
Zone 5	36,887	40,208	43,055	6,168	16.7%
Zone 6	20,821	22,465	23,873	3,052	14.7%
Zone 7	46,016	49,864	53,162	7,146	15.5%
Zone 8	56,444	64,873	72,099	15,655	27.7%
Zone 9	12,796	14,188	15,381	2,585	20.2%
Zone 10	68,585	75,121	80,723	12,138	17.7%
Zone 11	46,472	51,811	54,786	8,314	17.7%
TOTAL	420,472	473,590	517,516	97,044	23.1%

Notes:

Population projections for zones 1 to 10 (within the Mid West Region) have been prepared by Limerick City Council, whilst the population projections for Zone 11 (South Tipperary, South East Region) is derived from CSO data (see Appendix 4A for full details).

TABLE 2 - EXPENDITURE ON BULKY COMPARISON GOODS PER HEAD OF POPULATION BY ZONE (INCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)

Zone	Expenditure Per Head (€) ⁽¹⁾					
	2007	2009 (Base Year)	2016	2022	Increase (€) (2009-2022)	Increase % (2009-2022)
Zone 1	831	827	1,154	1,585	758	91.7%
Zone 2	831	827	1,154	1,585	758	91.7%
Zone 3	831	827	1,154	1,585	758	91.7%
Zone 4	831	827	1,154	1,585	758	91.7%
Zone 5	831	827	1,154	1,585	758	91.7%
Zone 6	831	827	1,154	1,585	758	91.7%
Zone 7	831	827	1,154	1,585	758	91.7%
Zone 8	831	827	1,154	1,585	758	91.7%
Zone 9	831	827	1,154	1,585	758	91.7%
Zone 10	831	827	1,154	1,585	758	91.7%
Zone 11	831	827	1,154	1,585	758	91.7%

Notes:

1) Average consumer expenditure per head on bulky comparison goods for 2007 has been estimated in each zone have been projected forwards to 2009 (the base year) and the forecast years of 2016 and 2022 by using expenditure per head growth rates for the Mid West Region produced by Oxford Economics for this Review (see Appendix 4B).

**TABLE 3 - EXPENDITURE ON BULKY COMPARISON GOODS PER HEAD OF POPULATION BY ZONE
(EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)**

Zone	Expenditure Per Head (€) ⁽¹⁾				
	2009 (Base Year)	2016	2022	Increase (€) (2009-2022)	Increase % (2009-2022)
Zone 1	746	1,010	1,365	619	83.0%
Zone 2	746	1,010	1,365	619	83.0%
Zone 3	746	1,010	1,365	619	83.0%
Zone 4	746	1,010	1,365	619	83.0%
Zone 5	746	1,010	1,365	619	83.0%
Zone 6	746	1,010	1,365	619	83.0%
Zone 7	746	1,010	1,365	619	83.0%
Zone 8	746	1,010	1,365	619	83.0%
Zone 9	746	1,010	1,365	619	83.0%
Zone 10	746	1,010	1,365	619	83.0%
Zone 11	746	1,010	1,365	619	83.0%

Notes:

(1) Expenditure per head on bulky comparison goods has been discounted by 9.8% (over the figures in Table 2) for the base year of 2009, to exclude non store retail sales which includes e-tailing. At 2016 and 2022, discounts of 12.50% and 13.90% have been assumed. The SFT percentages for the Mid West are derived from in-depth research carried out by Experian in the UK, but adjusted to reflect the retail economy of the region.

TABLE 4 - TOTAL AVAILABLE BULKY COMPARISON GOODS EXPENDITURE BY ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)					
Zone	Total Available Expenditure (€m) ⁽¹⁾				
	2009 (Base Year)	2016	2022	Increase (€) (2009-2022)	Increase % (2009-2022)
Zone 1	16.3	26.9	42.0	25.7	157.9%
Zone 2	15.6	25.0	38.4	22.8	146.2%
Zone 3	14.4	24.3	38.3	23.8	164.9%
Zone 4	52.5	80.4	119.4	67.0	127.6%
Zone 5	27.5	40.6	58.8	31.3	113.6%
Zone 6	15.5	22.7	32.6	17.1	109.8%
Zone 7	34.3	50.4	72.6	38.2	111.4%
Zone 8	42.1	65.5	98.4	56.3	133.7%
Zone 9	9.5	14.3	21.0	11.4	119.9%
Zone 10	51.2	75.9	110.2	59.0	115.4%
Zone 11	34.7	52.3	74.8	40.1	115.7%
TOTAL	313.7	478.2	706.4	392.7	125.2%

Notes:

(1) Total available expenditure totals for bulky comparison goods are calculated as follows: Population (Table 1) multiplied by consumer expenditure per head after making appropriate reductions for SFT (Table 3).

TABLE 5 - BULKY COMPARISON GOODS CENTRE MARKET SHARES BY ZONE IN THE BASE YEAR, 2009 (COLUMN PERCENT)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)										
	Survey Area										
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
WITHIN MID WEST											
Limerick - City Centre	20.3	18.0	37.1	57.1	24.2	17.4	21.9	2.7	1.1	4.6	2.4
Limerick - Rest of City	71.5	60.9	31.0	16.1	0.0	12.9	23.7	8.1	1.1	2.3	2.4
SUB TOTAL: LIMERICK CITY	91.8	78.9	68.1	73.2	24.2	30.4	45.6	10.8	2.2	6.9	4.9
Crescent Shopping Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Rest of Limerick - Suburbs (excludes City)	6.6	21.1	31.9	26.8	6.5	9.7	15.2	1.4	5.5	1.2	7.3
Rest of County	0.0	0.0	0.0	0.0	56.5	30.7	0.0	0.0	0.0	0.0	0.0
SUB TOTAL: LIMERICK COUNTY	6.6	21.1	31.9	26.8	62.9	40.4	15.2	1.4	5.5	1.2	7.3
Ennis	0.0	0.0	0.0	0.0	0.0	0.0	10.1	68.9	86.8	0.0	0.0
Shannon	0.0	0.0	0.0	0.0	0.0	0.0	15.5	0.0	0.0	0.0	0.0
Rest of County	0.0	0.0	0.0	0.0	0.0	0.0	7.8	16.2	0.0	0.0	0.0
CLARE COUNTY	0.0	0.0	0.0	0.0	0.0	0.0	33.4	85.1	86.8	0.0	0.0
NORTH TIPPERARY	0.0	0.0	0.0	0.0	0.0	0.0	2.0	0.0	0.0	86.2	7.3
SUB TOTAL: MID WEST	98.4	100.0	100.0	100.0	87.1	70.8	96.1	97.3	94.5	94.3	19.5
OUTSIDE MID WEST											
All Centres / Stores	1.6	0.0	0.0	0.0	12.9	29.2	3.9	2.7	5.5	5.7	80.5
SUB TOTAL: OUTSIDE MID WEST	1.6	0.0	0.0	0.0	12.9	29.2	3.9	2.7	5.5	5.7	80.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Notes:

The market share percentages are derived from the household telephone survey carried out within the Mid West between 23 February and 8 March, 2009. A more detailed breakdown is given in Appendix 3E.

TABLE 6 - ESTIMATED BULKY COMPARISON GOODS EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES IN THE BASE YEAR, 2009 (€MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-11)	Estimated Inflow Expenditure (Tourist) ⁽¹⁾	Total Bulky Goods Turnover	Bulky Goods Floorspace (sq.m. net) ⁽²⁾	Average Sales Density (€ per sq.m. net)	Benchmark Average Sales Density (€ per sq.m net) ⁽³⁾	Benchmark Bulky Goods Turnover (€m)	Extent of Any Over / Under Trading (€m)
	Survey Area																			
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11									
WITHIN MID WEST																				
Limerick - City Centre	3.3	2.8	5.4	30.0	6.7	2.7	7.5	1.1	0.1	2.4	0.8	62.8	62.8	0.0	62.8	8,837	7,104	4,500	39.8	23.0
Limerick - Rest of City	11.7	9.5	4.5	8.4	0.0	2.0	8.1	3.4	0.1	1.2	0.8	49.7	49.7	0.0	49.7	25,296	1,967	2,500	63.2	-13.5
SUB TOTAL: LIMERICK CITY	14.9	12.3	9.8	38.4	6.7	4.7	15.7	4.6	0.2	3.5	1.7	112.5	112.5	0.0	112.5	34,133	3,297	-	103.0	9.5
Crescent Shopping Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0	0	0	0.0	0.0
Rest of Limerick - Suburbs (excludes City)	1.1	3.4	5.2	4.4	1.1	1.6	2.5	0.2	0.9	0.2	1.2	21.7	21.7	0.0	21.7	32,168	674	2,500	80.4	-58.7
Rest of County	0.0	0.0	0.0	0.0	15.5	4.8	0.0	0.0	0.0	0.0	0.0	20.3	20.3	0.0	20.3	6,226	3,262	2,000	12.5	7.9
SUB TOTAL: LIMERICK COUNTY	1.1	3.3	4.6	14.1	17.3	6.3	5.2	0.6	0.5	0.6	2.5	56.1	56.1	0.0	56.1	38,394	1,460	-	92.9	-36.8
Ennis	0.0	0.0	0.0	0.0	0.0	0.0	3.5	29.0	8.3	0.0	0.0	40.8	40.8	0.0	40.8	26,040	1,565	2,500	65.1	-24.3
Shannon	0.0	0.0	0.0	0.0	0.0	0.0	5.3	0.0	0.0	0.0	0.0	5.3	5.3	0.0	5.3	5,054	1,051	2,250	11.4	-6.1
Rest of County	0.0	0.0	0.0	0.0	0.0	0.0	2.7	6.8	0.0	0.0	0.0	9.5	9.5	0.0	9.5	959	9,904	2,000	1.9	7.6
SUB TOTAL: CLARE COUNTY	0.0	0.0	0.0	0.0	0.0	0.0	11.5	35.8	8.3	0.0	0.0	55.6	55.6	0.0	55.6	32,053	1,734	-	78.4	-22.8
SUB TOTAL: NORTH TIPPERARY	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.0	44.1	2.5	47.3	47.3	0.0	47.3	29,462	1,606	2,250	66.3	-19.0
SUB TOTAL: MID WEST	16.0	15.6	14.4	52.5	24.0	11.0	33.0	41.0	9.0	48.2	6.8	271.5	271.5	0.0	271.5	134,042	2,025	-	340.6	-69.1
OUTSIDE MID WEST																				
All Centres / Stores	0.3	0.0	0.0	0.0	3.6	4.5	1.3	1.1	0.5	2.9	27.9	42.2								
SUB TOTAL	0.3	0.0	0.0	0.0	3.6	4.5	1.3	1.1	0.5	2.9	27.9	42.2								
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	16.3	15.6	14.4	52.5	27.5	15.5	34.3	42.1	9.5	51.2	34.7	313.7								

Notes:

- 1) Estimated by Colliers CRE (Appendix 4C).
- 2) Floorspace estimates provided by the Councils (Appendix 5B).
- 3) Benchmark sales densities estimated by Colliers CRE (See Section 5 of main report).

TABLE 7 - BULKY COMPARISON GOODS CENTRE MARKET SHARES BY ZONE AT DESIGN YEARS (COLUMN PERCENT)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)										
	Study Area										
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11

WITHIN MID WEST											
Limerick - City Centre	20.3	18.0	37.1	57.1	24.2	17.4	21.9	2.7	1.1	4.6	2.4
Limerick - Rest of City	71.5	60.9	31.0	16.1	0.0	12.9	23.7	8.1	1.1	2.3	2.4
SUB TOTAL: LIMERICK CITY	91.8	78.9	68.1	73.2	24.2	30.4	45.6	10.8	2.2	6.9	4.9
Crescent Shopping Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Rest of Limerick - Suburbs (excludes City)	6.6	21.1	31.9	26.8	6.5	9.7	15.2	1.4	5.5	1.2	7.3
Rest of County	0.0	0.0	0.0	0.0	56.5	30.7	0.0	0.0	0.0	0.0	0.0
SUB TOTAL: LIMERICK COUNTY	6.6	21.1	31.9	26.8	62.9	40.4	15.2	1.4	5.5	1.2	7.3
Ennis	0.0	0.0	0.0	0.0	0.0	0.0	10.1	68.9	86.8	0.0	0.0
Shannon	0.0	0.0	0.0	0.0	0.0	0.0	15.5	0.0	0.0	0.0	0.0
Rest of County	0.0	0.0	0.0	0.0	0.0	0.0	7.8	16.2	0.0	0.0	0.0
CLARE COUNTY	0.0	0.0	0.0	0.0	0.0	0.0	33.4	85.1	86.8	0.0	0.0
NORTH TIPPERARY	0.0	0.0	0.0	0.0	0.0	0.0	2.0	0.0	0.0	86.2	7.3
SUB TOTAL: MID WEST	98.4	100.0	100.0	100.0	87.1	70.8	96.1	97.3	94.5	94.3	19.5
OUTSIDE MID WEST											
All Centres / Stores	1.6	0.0	0.0	0.0	12.9	29.2	3.9	2.7	5.5	5.7	80.5
SUB TOTAL	1.6	0.0	0.0	0.0	12.9	29.2	3.9	2.7	5.5	5.7	80.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Notes:

The market shares in this table are the same as those set out in Table 5.

TABLE 8 - NON BULKY GOODS COMPARISON EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES, 2016 (€ MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)												TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-11) A	Estimated Inflow Expenditure (Tourists) ⁽¹⁾ B	Total Non Bulky Goods Turnover C = A + B	
	Study Area																
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11						
WITHIN MID WEST																	
Limerick - City Centre	49.7	46.3	44.8	148.5	50.0	16.8	86.8	24.2	5.3	28.0	19.3	519.8	519.8	29.6	549.4		
Limerick - Rest of City	12.9	9.9	6.1	9.9	0.0	2.8	1.9	1.3	0.0	0.0	0.0	44.7	44.7	4.4	49.1		
SUB TOTAL: LIMERICK CITY	62.7	56.1	50.9	158.4	50.0	19.6	88.7	25.5	5.3	28.0	19.3	564.5	564.5	34.0	598.5		
Crescent Shopping Centre	2.7	4.3	7.2	33.7	11.5	19.0	9.9	16.1	2.5	18.7	11.6	137.1	137.1	11.7	148.8		
Rest of Limerick - Suburbs (excludes City)	0.0	0.0	0.6	3.0	2.5	0.0	0.0	0.0	0.0	0.0	0.0	6.1	6.1	0.5	6.6		
Rest of County	0.0	0.0	0.0	0.0	23.0	6.1	0.0	0.0	0.0	0.0	0.0	29.2	29.2	2.5	31.7		
SUB TOTAL: LIMERICK COUNTY	2.7	4.3	7.8	36.6	37.0	25.1	9.9	16.1	2.5	18.7	11.6	172.3	172.3	14.7	187.0		
Ennis	0.0	0.0	0.0	0.0	0.0	0.0	11.2	95.9	24.9	0.0	0.0	131.9	131.9	28.8	160.7		
Shannon	0.0	0.0	0.0	0.0	0.0	0.0	5.6	2.9	0.0	0.0	0.0	8.5	8.5	2.1	10.6		
Rest of County	0.0	0.0	0.0	0.0	0.0	0.0	6.2	17.8	0.5	0.0	0.0	24.5	24.5	5.5	30.0		
SUB TOTAL: CLARE COUNTY	0.0	0.0	0.0	0.0	0.0	0.0	22.9	116.5	25.4	0.0	0.0	164.9	164.9	36.4	201.3		
NORTH TIPPERARY	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.0	125.2	11.5	137.9	137.9	4.1	142.0		
SUB TOTAL: MID WEST	65.3	60.5	58.7	195.0	87.0	44.7	122.8	158.2	33.2	171.9	42.4	1039.6	1039.6	89.2	1128.8		
OUTSIDE MID WEST																	
All Centres / Stores	1.0	1.2	1.1	3.0	13.0	11.2	1.2	3.2	2.1	14.9	86.5	138.5					
SUB TOTAL	1.0	1.2	1.1	3.0	13.0	11.2	1.2	3.2	2.1	14.9	86.5	138.5					
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	66.3	61.7	59.8	198.0	100.0	55.9	124.0	161.4	35.3	186.9	128.9	1178.1					

Notes:

For each cell, the monetary figure is derived by multiplying the 2016 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the convenience goods market share of the specific centre.
 (1) Estimated by Colliers CRE (see Appendix 4C).

TABLE 9 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2016 (€ MILLION)

Centre	2009 Turnover	2016 Turnover Potential	Turnover Allocation for Existing Retailers 2009-2016	Residual Turnover Potential by 2016	Potential Headroom Expenditure by 2016
	A	B	C ⁽¹⁾	D = B - C	E = D - A
	(Table 6, C)	(Table 8, C)			
WITHIN MID WEST					
Limerick - City Centre	25.4	31.9	2.4	29.5	4.0
Limerick - Rest of City	236.0	289.6	8.1	281.5	45.5
SUB TOTAL: LIMERICK CITY	261.4	321.5	10.5	311.0	49.5
Crescent Shopping Centre (Tesco)	59.7	72.1	3.8	68.4	8.7
Rest of Limerick - Suburbs (excludes City)	65.8	78.6	4.2	74.4	8.5
Rest of County	108.4	124.6	3.5	121.1	12.7
SUB TOTAL: LIMERICK COUNTY	233.9	275.3	11.5	263.8	29.9
Ennis	155.4	186.9	4.0	182.9	27.5
Shannon	20.7	23.7	0.7	22.9	2.2
Rest of County	61.7	72.9	3.2	69.7	8.0
SUB TOTAL: CLARE COUNTY	237.8	283.5	8.0	275.5	37.7
NORTH TIPPERARY	177.5	205.6	7.7	197.9	20.4
SUB TOTAL : MID WEST	910.6	1,085.9	37.7	1,048.2	137.5

Notes:

(1) We assume that all existing convenience goods floorspace at the base year (2009) will achieve a real sales productivity gain of 0.5% per annum. This figure is based on in-depth research carried out by Experian in the UK (see Section 5 in the main report), with an adjustment to reflect the retail economy of the Mid West and the planning aspirations of the Councils. The sales productivity gains are applied to the estimated 2009 benchmark convenience goods turnovers of each centre as set out in Table 6 (Column G).

TABLE 10 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2016

Centre	Potential Headroom Expenditure by 2016 (€m)	Adjustment for Over / Under Trading in Base Year (€m)	Adjusted Headroom Expenditure by 2016 (€m)	Reduction in Expenditure due to Bulky Goods Floorspace Commitments (as at March 2009) ⁽¹⁾	Adjusted Residual Headroom Expenditure by 2016 (€m)	Assumed Sales Density in 2016 ⁽²⁾ (€per sq.m net)	Estimated Retail Floorspace Need in 2016 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 9, E)	(Table 6, H)					
Limerick - City Centre	28.5	23.0	51.5	0.0	51.5	4,000	12,868
Limerick - Rest of City	20.4	-13.5	6.9	9.2	-2.3	4,000	-578
SUB TOTAL: LIMERICK CITY	48.8	9.5	58.4	9.2	49.2	-	12,291
Crescent Shopping Centre	0.0	0.0	0.0	0.0	0.0	4,000	0
Rest of Limerick - Suburbs (excludes City)	23.1	-58.7	-35.6	45.8	-81.4	4,000	-20,358
Rest of County	8.0	7.9	15.8	0.0	15.8	4,000	3,960
SUB TOTAL: LIMERICK COUNTY	17.0	-36.8	-19.8	45.8	-65.6	-	-16,399
Ennis	13.5	-24.3	-10.9	2.6	-13.5	4,000	-3,367
Shannon	1.0	-6.1	-5.1	0.0	-5.1	4,000	-1,263
Rest of County	4.8	7.6	12.4	22.9	-10.5	4,000	-2,632
SUB TOTAL: CLARE COUNTY	19.3	-22.8	-3.6	25.5	-29.0	-	-7,261
NORTH TIPPERARY	14.3	-19.0	-4.6	34.9	-39.5	4,000	-9,885
TOTAL	99.5	-69.1	30.4	115.4	-85.0		-21,255

Notes:

(1) Details and estimated 2016 turnovers of bulky comparison goods floorspace commitments are set out in Appendix 5C.

(2) The derivation of our 2016 benchmark centre sales density estimates are set out in Section 5 of the main report.

TABLE 11 - BULKY COMPARISON GOODS EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES, 2022 (€MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-11) A	Estimated Inflow Expenditure (Day Trippers) ⁽¹⁾ B	Total Bulky Goods Turnover C = A + B		
	Study Area																
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11						
WITHIN MID WEST																	
Limerick - City Centre	8.5	6.9	14.2	68.2	14.2	5.7	15.9	2.7	0.2	5.1	1.8	143.4	143.4	0.0	143.4		
Limerick - Rest of City	30.0	23.4	11.9	19.2	0.0	4.2	17.2	8.0	0.2	2.5	1.8	118.5	118.5	0.0	118.5		
SUB TOTAL: LIMERICK CITY	38.5	30.3	26.1	87.4	14.2	9.9	33.1	10.6	0.5	7.6	3.6	261.9	261.9	-	261.9		
Crescent Shopping Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Rest of Limerick - Suburbs (excludes City)	2.8	8.1	12.2	32.0	3.8	3.2	11.0	1.3	1.2	1.3	5.5	82.3	82.3	0.0	82.3		
Rest of County	0.0	0.0	0.0	0.0	33.2	10.0	0.0	0.0	0.0	0.0	0.0	43.2	43.2	0.0	43.2		
SUB TOTAL: LIMERICK COUNTY	2.8	8.1	12.2	32.0	37.0	13.2	11.0	1.3	1.2	1.3	5.5	125.5	125.5	-	125.5		
Ennis	0.0	0.0	0.0	0.0	0.0	0.0	7.3	67.8	18.2	0.0	0.0	93.3	93.3	0.0	93.3		
Shannon	0.0	0.0	0.0	0.0	0.0	0.0	11.2	0.0	0.0	0.0	0.0	11.2	11.2	0.0	11.2		
Rest of County	0.0	0.0	0.0	0.0	0.0	0.0	5.7	15.9	0.0	0.0	0.0	21.6	21.6	0.0	21.6		
SUB TOTAL: CLARE COUNTY	0.0	0.0	0.0	0.0	0.0	0.0	24.2	83.8	18.2	0.0	0.0	126.2	126.2	-	126.2		
NORTH TIPPERARY	0.0	0.0	0.0	0.0	0.0	0.0	1.4	0.0	0.0	95.0	5.5	101.9	101.9	0.0	101.9		
SUB TOTAL: MID WEST	41.3	38.4	38.3	119.4	51.2	23.1	69.8	95.7	19.9	103.9	14.6	615.6	615.6	0.0	615.5		
OUTSIDE MID WEST																	
All Centres / Stores	0.7	0.0	0.0	0.0	7.6	9.5	2.8	2.7	1.1	6.3	60.2						
SUB TOTAL	0.7	0.0	0.0	0.0	7.6	9.5	2.8	2.7	1.1	6.3	60.2	90.9					
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	42.0	38.4	38.3	119.4	58.8	32.6	72.6	98.4	21.0	110.2	74.8	706.5					

Notes:
 For each cell, the monetary figure is derived by multiplying the 2022 available bulky comparison goods expenditure in the zone (excl. SFT) (Table 4) by bulky comparison goods market share of the specific centre in that zone.
 (1) Estimated by Colliers CRE (Appendix 4C).

TABLE 12 - CALCULATION OF POTENTIAL BULKY COMPARISON GOODS HEADROOM EXPENDITURE, 2022 (€ MILLION)

Centre	2009 Turnover	2022 Turnover Potential	Turnover Allocation for Existing Retailers 2009-2022	Residual Turnover Potential by 2022	Potential Headroom Expenditure by 2022
	A	B	C ⁽¹⁾	D = B - C	E = D - A
	(Table 6, C)	(Table 11, C)			
Limerick - City Centre	62.8	143.4	10.1	133.4	70.6
Limerick - Rest of City	49.7	118.5	16.0	102.5	52.7
SUB TOTAL: LIMERICK CITY	112.5	261.9	26.1	235.9	123.4
Crescent Shopping Centre	0.0	0.0	0.0	0.0	0.0
Rest of Limerick - Suburbs (excludes City)	21.7	82.3	20.3	61.9	40.3
Rest of County	20.3	43.2	3.2	40.1	19.8
SUB TOTAL: LIMERICK COUNTY	56.1	125.5	23.5	102.0	46.0
Ennis	40.8	93.3	16.5	76.9	36.1
Shannon	5.3	11.2	2.9	8.4	3.0
Rest of County	9.5	21.6	0.5	21.1	11.6
SUB TOTAL: CLARE COUNTY	55.6	126.2	19.8	106.3	50.8
NORTH TIPPERARY	47.3	101.9	16.8	85.1	37.8
TOTAL	271.5	615.5	86.2	529.4	257.9

Notes:

(1) We assume that all existing bulky comparison goods floorspace at the base year (2009) will achieve a real sales productivity gain of 1.75% per annum. This figure is based on in-depth research carried out by Experian in the UK (see Section 5 in the main report), with an adjustment to reflect the retail economy of the Mid West and the planning aspirations of the Councils. The sales productivity gains are applied to the estimated 2009 benchmark bulky comparison goods turnovers of each centre as set out in Table 6 (Column G).

TABLE 13 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2022

Centre	Potential Headroom Expenditure by 2022 (€m)	Adjustment for Over / Under Trading in Base Year (€m)	Adjusted Headroom Expenditure by 2022 (€m)	Reduction in Expenditure due to Bulky Goods Floorspace Commitments (as at March 2009) ⁽¹⁾	Adjusted Residual Headroom Expenditure by 2022 (€m)	Assumed Sales Density in 2022 ⁽²⁾ (€per sq.m net)	Estimated Retail Floorspace Need in 2022 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 12, E)	(Table 6, H)					
Limerick - City Centre	70.6	23.0	93.6	0.0	93.6	4,439	21,090
Limerick - Rest of City	52.7	-13.5	39.2	10.2	29.0	4,439	6,544
SUB TOTAL: LIMERICK CITY	123.4	9.5	132.9	10.2	122.7	-	27,634
Crescent Shopping Centre	0.0	0.0	0.0	0.0	0.0	4,439	0
Rest of Limerick - Suburbs (excludes City)	40.3	-58.7	-18.5	50.8	-69.3	4,439	-15,606
Rest of County	19.8	7.9	27.6	0.0	27.6	4,439	6,222
SUB TOTAL: LIMERICK COUNTY	46.0	-36.8	9.1	50.8	-41.7	-	-9,384
Ennis	36.1	-24.3	11.8	2.9	8.9	4,439	1,997
Shannon	3.0	-6.1	-3.0	0.0	-3.0	4,439	-680
Rest of County	11.6	7.6	19.2	25.5	-6.3	4,439	-1,419
SUB TOTAL: CLARE COUNTY	50.8	-22.8	27.9	28.4	-0.5	-	-102
NORTH TIPPERARY	37.8	-19.0	18.8	38.8	-20.0	4439	-4,497
TOTAL	257.9	-69.1	188.8	128.2	60.6		13,651

Notes:

(1) Details and estimated 2022 turnovers of bulky comparison goods floorspace commitments are set out in Appendix 5C.

(2) The derivation of our 2022 benchmark centre sales density estimates are set out in Section 5 in the main report.

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RETAIL STRATEGY FOR THE
MID WEST REGION
2010-2016

APPENDIX 6D

**The Need for Additional Convenience
Goods Floorspace**

**RETAIL FLOORSPACE NEED ASSESSMENT: CONVENIENCE GOODS
(INCORPORATING ESTIMATES OF (ANY) UNDER / OVER TRADING AT THE BASE YEAR, 2009)**

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TABLE 13 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2022

TABLE 1 - POPULATION CHANGE BY ZONE					
Zone	2009 Population (Base Year)	2016 Population	2022 Population	Total Increase (2009-2022)	Percentage Increase (2009-2022)
Zone 1	21,836	26,652	30,779	8,943	41.0%
Zone 2	20,909	24,797	28,129	7,220	34.5%
Zone 3	19,365	24,034	28,035	8,670	44.8%
Zone 4	70,341	79,577	87,494	17,153	24.4%
Zone 5	36,887	40,208	43,055	6,168	16.7%
Zone 6	20,821	22,465	23,873	3,052	14.7%
Zone 7	46,016	49,864	53,162	7,146	15.5%
Zone 8	56,444	64,873	72,099	15,655	27.7%
Zone 9	12,796	14,188	15,381	2,585	20.2%
Zone 10	68,585	75,121	80,723	12,138	17.7%
Zone 11	46,472	51,811	54,786	8,314	17.7%
TOTAL	420,472	473,590	517,516	97,044	23.1%

Notes:

Population projections for zones 1 to 10 (within the Mid West Region) have been prepared by Limerick City Council, whilst the population projections for Zone 11 (South Tipperary, South East Region) is derived from CSO data (see Appendix 4A for full details).

TABLE 2 - EXPENDITURE ON CONVENIENCE GOODS PER HEAD OF POPULATION BY ZONE (INCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)

Zone	Expenditure Per Head (€) (1)					
	2007	2009 (Base Year)	2016	2022	Increase (€) (2009-2022)	Increase % (2009-2022)
Zone 1	2,768	2,624	2,836	2,975	351	13.4%
Zone 2	2,768	2,624	2,836	2,975	351	13.4%
Zone 3	2,768	2,624	2,836	2,975	351	13.4%
Zone 4	2,768	2,624	2,836	2,975	351	13.4%
Zone 5	2,768	2,624	2,836	2,975	351	13.4%
Zone 6	2,768	2,624	2,836	2,975	351	13.4%
Zone 7	2,768	2,624	2,836	2,975	351	13.4%
Zone 8	2,768	2,624	2,836	2,975	351	13.4%
Zone 9	2,768	2,624	2,836	2,975	351	13.4%
Zone 10	2,768	2,624	2,836	2,975	351	13.4%
Zone 11	2,768	2,624	2,836	2,975	351	13.4%

Notes:

1) Average consumer expenditure per head on convenience goods for 2007 has been estimated by Oxford Economics for the Mid West Region. The 2007 expenditure per head figures in each zone have then been projected forwards to 2009 (the base year) and the forecast years of 2016 and 2022 by using expenditure per head growth rates for the Mid West produced by Oxford Economics for this Review (see Appendix 4B).

TABLE 3 - EXPENDITURE ON CONVENIENCE GOODS PER HEAD OF POPULATION BY ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)					
Zone	Expenditure Per Head (€)⁽¹⁾				
	2009 (Base Year)	2016	2022	Increase (€) (2009-2022)	Increase % (2009-2022)
Zone 1	2,488	2,629	2,734	246	9.9%
Zone 2	2,488	2,629	2,734	246	9.9%
Zone 3	2,488	2,629	2,734	246	9.9%
Zone 4	2,488	2,629	2,734	246	9.9%
Zone 5	2,488	2,629	2,734	246	9.9%
Zone 6	2,488	2,629	2,734	246	9.9%
Zone 7	2,488	2,629	2,734	246	9.9%
Zone 8	2,488	2,629	2,734	246	9.9%
Zone 9	2,488	2,629	2,734	246	9.9%
Zone 10	2,488	2,629	2,734	246	9.9%
Zone 11	2,488	2,629	2,734	246	9.9%

Notes:

(1) Expenditure per head on convenience goods has been discounted by 5.2% (over the figures in Table 2) for the base year of 2009, to exclude non store retail sales which includes e-tailing. At 2016 and 2022, discounts of 7.3% and 8.1% have been assumed.

The SFT percentages for the Mid West are based on in-depth research carried out by Experian in the UK, but adjusted to reflect the retail economy of the region.

TABLE 4 - TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE BY ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)					
Zone	Total Available Expenditure (€m) ⁽¹⁾				
	2009 (Base Year)	2016	2022	Increase (€) (2009-2022)	Increase % (2009-2022)
Zone 1	54.3	70.1	84.2	29.8	54.9%
Zone 2	52.0	65.2	76.9	24.9	47.9%
Zone 3	48.2	63.2	76.6	28.5	59.1%
Zone 4	175.0	209.2	239.2	64.2	36.7%
Zone 5	91.8	105.7	117.7	26.0	28.3%
Zone 6	51.8	59.1	65.3	13.5	26.0%
Zone 7	114.5	131.1	145.3	30.9	27.0%
Zone 8	140.4	170.5	197.1	56.7	40.4%
Zone 9	31.8	37.3	42.1	10.2	32.1%
Zone 10	170.6	197.5	220.7	50.1	29.4%
Zone 11	115.6	136.2	149.8	34.2	29.6%
TOTAL	1045.9	1245.1	1414.9	369.0	35.3%

Notes:

(1) Total available expenditure totals for convenience goods are calculated as follows: Population (Table 1) multiplied by consumer expenditure after making appropriate reductions for SFT (Table 3).

TABLE 5 - CONVENIENCE GOODS CENTRE MARKET SHARES BY ZONE IN THE BASE YEAR, 2009 (COLUMN PERCENT)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)										
	Survey Area										
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
WITHIN MID WEST											
Limerick - City Centre	0.9	14.9	18.5	4.5	0.0	0.5	0.0	0.0	0.0	0.0	0.0
Limerick - Rest of City	97.6	67.0	64.3	31.7	2.8	10.0	45.0	0.0	0.0	0.0	0.0
SUB TOTAL: LIMERICK CITY	98.5	81.9	82.8	36.2	2.8	10.4	45.0	0.0	0.0	0.0	0.0
Crescent Shopping Centre (Tesco)	0.0	0.3	14.6	28.9	1.3	0.0	0.0	0.0	0.6	0.0	0.0
Rest of Limerick - Suburbs (excludes City)	0.9	2.3	0.5	32.9	2.6	6.6	0.0	0.0	0.0	0.0	0.0
Rest of County	0.0	0.0	2.0	0.0	88.0	49.4	0.0	0.0	0.0	0.0	0.0
SUB TOTAL: LIMERICK COUNTY	0.9	2.6	17.1	61.7	91.9	55.9	0.0	0.0	0.6	0.0	0.0
Ennis	0.0	0.0	0.0	0.0	0.0	0.0	11.6	86.5	57.9	0.0	0.0
Shannon	0.0	0.0	0.0	0.0	0.0	1.0	17.4	0.0	0.0	0.0	0.0
Rest of County	0.0	13.7	0.0	0.0	0.0	0.0	20.7	13.2	35.9	0.0	0.0
SUB TOTAL: CLARE COUNTY	0	13.7	0	0	0	1.0	49.7	99.6	93.8	0	0
NORTH TIPPERARY	0	0	0	0	0	0	0	0	0	98.8	7.3
SUB TOTAL: MID WEST	99.4	98.2	99.9	98.0	94.7	67.4	94.7	99.6	94.4	98.8	7.3
OUTSIDE MID WEST REGION											
All Centres / Stores	0.6	1.8	0.1	2.0	5.3	32.6	5.3	0.4	5.6	1.2	92.7
SUB TOTAL	0.6	1.8	0.1	2.0	5.3	32.6	5.3	0.4	5.6	1.2	92.7
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Notes:

The market share percentages are derived from the household telephone survey carried out in the Mid West between 23 February and 8 March 2009. A more detailed breakdown of the market shares is set out in Appendix 3E.

TABLE 6 - ESTIMATED CONVENIENCE GOODS EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES IN THE BASE YEAR, 2009 (€ MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-11)	Estimated Inflow Expenditure (Tourists) ⁽¹⁾	Total Convenience Goods Turnover	Convenience Goods Floorspace (sq.m. net) ⁽²⁾	Average Sales Density (€ per sq.m. net)	Benchmark Average Sales Density (€ per sq.m net) ⁽³⁾	Benchmark Convenience Goods Turnover (€m)	Extent of Any Over / Under Trading (€m)
	Survey Area																			
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11									
WITHIN MID WEST																				
Limerick - City Centre	0.5	7.8	8.9	7.8	0.0	0.2	0.0	0.0	0.0	0.0	0.0	25.2	25.2	0.2	25.4	11,283	2,254	6,000	67.7	-42.3
Limerick - Rest of City	53.0	34.8	31.0	55.5	2.6	5.2	51.5	0.0	0.0	0.0	0.0	233.7	233.7	2.3	236.0	19,055	12,385	12,000	228.7	7.3
SUB TOTAL: LIMERICK CITY	53.5	42.6	39.9	63.4	2.6	5.4	51.5	0.0	0.0	0.0	0.0	258.9	258.9	2.5	261.4	30,338	8,617	-	296.4	-34.9
Crescent Shopping Centre	0.0	0.2	7.0	50.6	1.2	0.0	0.0	0.0	0.2	0.0	0.0	59.1	59.1	0.6	59.7	10,616	5,625	10,000	106.2	-46.4
Rest of Limerick - Suburbs (excludes City)	0.5	1.2	0.3	57.5	2.4	3.4	0.0	0.0	0.0	0.0	0.0	65.2	65.2	0.6	65.8	14,807	4,447	8,000	118.5	-52.6
Rest of County	0.0	0.0	1.0	0.0	80.7	25.6	0.0	0.0	0.0	0.0	0.0	107.3	107.3	1.1	108.4	14,217	7,622	7,000	99.5	8.8
SUB TOTAL: LIMERICK COUNTY	0.5	1.3	8.2	108.0	84.3	29.0	0.0	0.0	0.2	0.0	0.0	231.6	231.6	2.3	233.9	39,640	5,901	-	324.1	-90.2
Ennis	0.0	0.0	0.0	0.0	0.0	0.0	13.3	121.4	18.4	0.0	0.0	153.1	153.1	2.3	155.4	9,351	16,621	12,000	112.2	43.2
Shannon	0.0	0.0	0.0	0.0	0.0	0.5	19.9	0.0	0.0	0.0	0.0	20.4	20.4	0.3	20.7	2,627	7,882	8,000	21.0	-0.3
Rest of County	0.0	7.1	0.0	0.0	0.0	0.0	23.7	18.5	11.4	0.0	0.0	60.7	60.7	1.0	61.7	15,157	4,069	6,000	90.9	-29.3
SUB TOTAL: CLARE COUNTY	0	7.1	0	0	0	0.5	56.8	139.87	29.86	0	0	234.2	234.2	3.6	237.8	27,135	8,764	-	224.2	13.6
NORTH TIPPERARY	0	0	0	0	0	0	0	0	0	168.63	8.5	177.1	177.1	0.4	177.5	36,113	4,915	6,000	216.7	-39.2
SUB TOTAL: MID WEST	54.0	51.1	48.1	171.4	86.9	34.9	108.4	139.9	30.1	168.6	8.5	901.8	901.8	8.8	910.6	133,226	6,835	-	1,061.3	-150.7
OUTSIDE MID WEST																				
All Centres / Stores	0.3	1.0	0.1	3.6	4.8	16.9	6.1	0.5	1.8	2.0	107.1	144.1								
SUB TOTAL	0.3	1.0	0.1	3.6	4.8	16.9	6.1	0.5	1.8	2.0	107.1	144.1								
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	54.3	52.0	48.2	175.0	91.8	51.8	114.5	140.4	31.8	170.6	115.6	1045.9								

Notes:
 1) Estimated by Colliers CRE (Appendix 4C).
 2) Floorspace estimates provided by the Councils (Appendix 5B).
 3) Benchmark sales densities estimated by Colliers CRE (See Section 5 of main report).

TABLE 7 - CONVENIENCE GOODS CENTRE MARKET SHARES BY ZONE AT DESIGN YEARS (COLUMN PERCENT)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)										
	Study Area										
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
WITHIN MID WEST											
Limerick - City Centre	0.9	14.9	18.5	4.5	0.0	0.5	0.0	0.0	0.0	0.0	0.0
Limerick - Rest of City	97.6	67.0	64.3	31.7	2.8	10.0	45.0	0.0	0.0	0.0	0.0
SUB TOTAL: LIMERICK CITY	98.5	81.9	82.8	36.2	2.8	10.4	45.0	0.0	0.0	0.0	0.0
Crescent Shopping Centre (Tesco)	0.0	0.3	14.6	28.9	1.3	0.0	0.0	0.0	0.6	0.0	0.0
Rest of Limerick - Suburbs (excludes City)	0.9	2.3	0.5	32.9	2.6	6.6	0.0	0.0	0.0	0.0	0.0
Rest of County	0.0	0.0	2.0	0.0	88.0	49.4	0.0	0.0	0.0	0.0	0.0
SUB TOTAL: LIMERICK COUNTY	0.9	2.6	17.1	61.7	91.9	55.9	0.0	0.0	0.6	0.0	0.0
Ennis	0.0	0.0	0.0	0.0	0.0	0.0	11.6	86.5	57.9	0.0	0.0
Shannon	0.0	0.0	0.0	0.0	0.0	1.0	17.4	0.0	0.0	0.0	0.0
Rest of County	0.0	13.7	0.0	0.0	0.0	0.0	20.7	13.2	35.9	0.0	0.0
SUB TOTAL: CLARE COUNTY	0	13.7	0	0	0	1.0	49.7	99.6	93.8	0	0
NORTH TIPPERARY	0	0	0	0	0	0	0	0	0	98.8	7.3
SUB TOTAL: MID WEST	99.4	98.2	99.9	98.0	94.7	67.4	94.7	99.6	94.4	98.8	7.3
OUTSIDE MID WEST											
All Centres / Stores	0.6	1.8	0.1	2.0	5.3	32.6	5.3	0.4	5.6	1.2	92.7
SUB TOTAL	0.6	1.8	0.1	2.0	5.3	32.6	5.3	0.4	5.6	1.2	92.7
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Notes:

The market shares in this table are the same as those set out in Table 5.

TABLE 8 - CONVENIENCE GOODS EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES, 2016 (€ MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-11) A	Estimated Inflow Expenditure (Tourists) ⁽¹⁾ B	Total Convenience Goods Turnover C = A + B		
	Study Area																
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11						
WITHIN MID WEST																	
Limerick - City Centre	0.6	9.7	11.7	9.4	0.0	0.3	0.0	0.0	0.0	0.0	0.0	31.7	31.7	0.2	31.9		
Limerick - Rest of City	68.4	43.7	40.6	66.4	3.0	5.9	59.0	0.0	0.0	0.0	0.0	287.0	287.0	2.6	289.6		
SUB TOTAL: LIMERICK CITY	69.0	53.4	52.3	75.8	3.0	6.2	59.0	0.0	0.0	0.0	0.0	318.7	318.7	2.8	321.5		
Crescent Shopping Centre (Tesco)	0.0	0.2	9.2	60.4	1.4	0.0	0.0	0.0	0.2	0.0	0.0	71.4	71.4	0.7	72.1		
Rest of Limerick - Suburbs (excludes City)	0.7	1.5	0.3	68.7	2.8	3.9	0.0	0.0	0.0	0.0	0.0	77.9	77.9	0.7	78.6		
Rest of County	0.0	0.0	1.3	0.0	93.0	29.2	0.0	0.0	0.0	0.0	0.0	123.4	123.4	1.2	124.6		
SUB TOTAL: LIMERICK COUNTY	0.7	1.7	10.8	129.2	97.1	33.0	0.0	0.0	0.2	0.0	0.0	272.7	272.7	2.6	275.3		
Ennis	0.0	0.0	0.0	0.0	0.0	0.0	15.2	147.5	21.6	0.0	0.0	184.3	184.3	2.6	186.9		
Shannon	0.0	0.0	0.0	0.0	0.0	0.6	22.8	0.0	0.0	0.0	0.0	23.4	23.4	0.3	23.7		
Rest of County	0.0	8.9	0.0	0.0	0.0	0.0	27.1	22.4	13.4	0.0	0.0	71.8	71.8	1.1	72.9		
SUB TOTAL: CLARE COUNTY	0.0	8.9	0.0	0.0	0.0	0.6	65.1	169.9	35.0	0.0	0.0	279.5	279.5	4.0	283.5		
NORTH TIPPERARY	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	195.2	10.0	205.2	205.2	0.4	205.6		
SUB TOTAL : MID WEST	69.7	64.0	63.1	204.9	100.1	39.8	124.1	169.9	35.2	195.2	10.0	1076.1	1076.1	9.8	1085.9		
OUTSIDE MID WEST																	
All Centres / Stores	0.4	1.2	0.1	4.3	5.6	19.3	7.0	0.6	2.1	2.3	126.2	169.0	169.0				
SUB TOTAL	0.4	1.2	0.1	4.3	5.6	19.3	7.0	0.6	2.1	2.3	126.2	169.0					
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	70.1	65.2	63.2	209.2	105.7	59.1	131.1	170.5	37.3	197.5	136.2	1245.1					

Notes:
 For each cell, the monetary figure is derived by multiplying the 2016 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the convenience goods market share of the specific centre in that zone (Table 7).
 (1) Estimated by Colliers CRE (see Appendix 4C).

TABLE 9 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2016 (€ MILLION)

Centre	2009 Turnover	2016 Turnover Potential	Turnover Allocation for Existing Retailers 2009-2016	Residual Turnover Potential by 2016	Potential Headroom Expenditure by 2016
	A	B	C ⁽¹⁾	D = B - C	E = D - A
	(Table 6, C)	(Table 8, C)			
WITHIN MID WEST					
Limerick - City Centre	25.4	31.9	2.4	29.5	4.0
Limerick - Rest of City	236.0	289.6	8.1	281.5	45.5
SUB TOTAL: LIMERICK CITY	261.4	321.5	10.5	311.0	49.5
Crescent Shopping Centre (Tesco)	59.7	72.1	3.8	68.4	8.7
Rest of Limerick - Suburbs (excludes City)	65.8	78.6	4.2	74.4	8.5
Rest of County	108.4	124.6	3.5	121.1	12.7
SUB TOTAL: LIMERICK COUNTY	233.9	275.3	11.5	263.8	29.9
Ennis	155.4	186.9	4.0	182.9	27.5
Shannon	20.7	23.7	0.7	22.9	2.2
Rest of County	61.7	72.9	3.2	69.7	8.0
SUB TOTAL: CLARE COUNTY	237.8	283.5	8.0	275.5	37.7
NORTH TIPPERARY	177.5	205.6	7.7	197.9	20.4
SUB TOTAL : MID WEST	910.6	1,085.9	37.7	1,048.2	137.5

Notes:

(1) We assume that all existing convenience goods floorspace at the base year (2009) will achieve a real sales productivity gain of 0.5% per annum. This figure is based on in-depth research carried out by Experian in the UK (see Section 5 in the main report), with an adjustment to reflect the retail economy of the Mid West and the planning aspirations of the Councils. The sales productivity gains are applied to the estimated 2009 benchmark convenience goods turnovers of each centre as set out in Table 6 (Column G).

TABLE 10 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2016

Centre	Potential Headroom Expenditure by 2016 (€m)	Adjustment for Over / Under Trading in Base Year (€m)	Adjusted Headroom Expenditure by 2016 (€m)	Reduction in Expenditure due to Convenience Goods Floorspace Commitments (as at March 2009) ⁽¹⁾	Adjusted Residual Headroom Expenditure by 2016 (€m)	Assumed Sales Density in 2016 ⁽²⁾ (€/sq.m net)	Estimated Retail Floorspace Need in 2016 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 9, E)	(Table 6, H)					
WITHIN MID WEST							
Limerick - City Centre	4.0	-42.3	-38.2	19.8	-58.0	10,000	-5,803
Limerick - Rest of City	45.5	7.3	52.8	19.8	33.0	10,000	3,303
SUB TOTAL: LIMERICK CITY	49.5	-34.9	14.6	39.6	-25.0	-	-2,499
Crescent Shopping Centre (Tesco)	8.7	-46.4	-37.8	0.0	-37.8	10,000	-3,778
Rest of Limerick - Suburbs (excludes City)	8.5	-52.6	-44.1	104.9	-149.0	10,000	-14,900
Rest of County	12.7	8.8	21.6	12.7	8.9	10,000	886
SUB TOTAL: LIMERICK COUNTY	29.9	-90.2	-60.3	117.6	-177.9	-	-17,793
Ennis	27.5	43.2	70.7	10.2	60.5	10,000	6,049
Shannon	2.2	-0.3	1.9	34.3	-32.4	10,000	-3,240
Rest of County	8.0	-29.3	-21.2	25.1	-46.3	10,000	-4,633
SUB TOTAL: CLARE COUNTY	37.7	13.6	51.4	69.6	-18.2	-	-1,824
NORTH TIPPERARY	20.4	-39.2	-18.8	57.9	-76.7	10,000	-7,672
TOTAL	137.5	-150.7	-13.2	284.7	-297.9		-29,788

Notes:

(1) Details and estimated 2016 turnovers of convenience goods floorspace commitments are set out in Appendix 5C.

(2) The derivation of our 2016 benchmark centre sales density estimates are set out in Section 5 of the main report.

TABLE 11 - CONVENIENCE GOODS EXPENDITURE PATTERNS AND CENTRE TURNOVER ESTIMATES, 2022 (€MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-11) A	Estimated Inflow Expenditure (Tourists) ⁽¹⁾ B	Total Convenience Goods Turnover C = A + B
	Study Area														
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11				
WITHIN MID WEST															
Limerick - City Centre	0.7	11.5	14.1	10.7	0.0	0.3	0.0	0.0	0.0	0.0	0.0	37.4	37.4	0.3	37.7
Limerick - Rest of City	82.2	51.5	49.2	75.9	3.4	6.5	65.4	0.0	0.0	0.0	0.0	334.2	334.2	2.9	337.1
SUB TOTAL: LIMERICK CITY	82.9	63.0	63.4	86.6	3.4	6.8	65.4	0.0	0.0	0.0	0.0	371.6	371.6	3.2	374.8
Crescent Shopping Centre (Tesco)	0.0	0.2	11.1	69.1	1.5	0.0	0.0	0.0	0.3	0.0	0.0	82.3	82.3	0.8	83.1
Rest of Limerick - Suburbs (excludes City)	0.8	1.8	0.4	78.6	3.1	4.3	0.0	0.0	0.0	0.0	0.0	88.9	88.9	0.8	89.7
Rest of County	0.0	0.0	1.5	0.0	103.5	32.2	0.0	0.0	0.0	0.0	0.0	137.3	137.3	1.4	138.7
SUB TOTAL: LIMERICK COUNTY	0.8	2.0	13.1	147.7	108.2	36.5	0.0	0.0	0.3	0.0	0.0	308.5	308.5	3.0	311.5
Ennis	0.0	0.0	0.0	0.0	0.0	0.0	16.9	170.4	24.4	0.0	0.0	211.7	211.7	2.9	214.6
Shannon	0.0	0.0	0.0	0.0	0.0	0.7	25.2	0.0	0.0	0.0	0.0	25.9	25.9	0.4	26.3
Rest of County	0.0	10.5	0.0	0.0	0.0	0.0	30.0	25.9	15.1	0.0	0.0	81.6	81.6	1.3	82.9
SUB TOTAL: CLARE COUNTY	0.0	10.5	0.0	0.0	0.0	0.7	72.1	196.4	39.5	0.0	0.0	319.2	319.2	4.6	323.8
NORTH TIPPERARY	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	218.1	11.0	229.1	229.1	0.5	229.6
SUB TOTAL : MID WEST	83.7	75.5	76.5	234.3	111.5	44.0	137.6	196.4	39.7	218.1	11.0	1228.3	1228.3	11.3	1239.6
OUTSIDE MID WEST															
All Centres / Stores	0.5	1.4	0.1	4.9	6.2	21.3	7.7	0.7	2.4	2.6	138.8	186.5			
SUB TOTAL	0.5	1.4	0.1	4.9	6.2	21.3	7.7	0.7	2.4	2.6	138.8	186.5			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	84.2	76.9	76.6	239.2	117.7	65.3	145.3	197.1	42.1	220.7	149.8	1414.9			

Notes:
 For each cell, the monetary figure is derived by multiplying the 2022 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the convenience goods market share of the specific centre in that zone (Table 7).
 (1) Estimated by Colliers CRE (see Appendix 5C).

TABLE 12 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2022 (€ MILLION)

Centre	2009 Turnover	2022 Turnover Potential	Turnover Allocation for Existing Retailers 2009-2022	Residual Turnover Potential by 2022	Potential Headroom Expenditure by 2022
	A	B	C ⁽¹⁾	D = B - C	E = D - A
	(Table 6, C)	(Table 11, C)			
WITHIN MID WEST					
Limerick - City Centre	25.4	37.7	4.5	33.2	7.7
Limerick - Rest of City	236.0	337.1	15.3	321.7	85.8
SUB TOTAL: LIMERICK CITY	261.4	374.8	19.9	354.9	93.5
Crescent Shopping Centre (Tesco)	59.7	83.1	7.1	76.0	16.3
Rest of Limerick - Suburbs (excludes City)	65.8	89.7	7.9	81.8	15.9
Rest of County	108.4	138.7	6.7	132.0	23.7
SUB TOTAL: LIMERICK COUNTY	233.9	311.5	21.7	289.8	55.9
Ennis	155.4	214.6	7.5	207.1	51.6
Shannon	20.7	26.3	1.4	24.9	4.2
Rest of County	61.7	82.9	6.1	76.8	15.1
SUB TOTAL: CLARE COUNTY	237.8	323.8	15.0	308.8	70.9
NORTH TIPPERARY	177.5	229.6	14.5	215.1	37.6
TOTAL: MID WEST	910.6	1,239.6	71.1	1,168.5	257.9

Notes:

(1) We assume that all existing convenience goods floorspace at the base year (2009) will achieve a real sales productivity gain of 0.5% per annum. This figure is based on in-depth research carried out by Experian in the UK (see Section 5 in the main report), with an adjustment to reflect the retail economy of the Mid West and the planning aspirations of the Councils. The sales productivity gains are applied to the estimated 2009 benchmark convenience goods turnovers of each centre as set out in Table 6 (Column G).

TABLE 13 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2022

Centre	Potential Headroom Expenditure by 2022 (€m)	Adjustment for Over / Under Trading in Base Year (€m)	Adjusted Headroom Expenditure by 2022 (€m)	Reduction in Expenditure due to Convenience Goods Floorspace Commitments (as at March 2009) ⁽¹⁾	Adjusted Residual Headroom Expenditure by 2022 (€m)	Assumed Sales Density in 2022 ⁽²⁾ (€per sq.m net)	Estimated Retail Floorspace Need in 2022 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 12, E)	(Table 6, H)					
WITHIN MID WEST							
Limerick - City Centre	7.7	-42.3	-34.5	20.4	-54.9	10,304	-5,331
Limerick - Rest of City	85.8	7.3	93.1	20.4	72.7	10,304	7,054
SUB TOTAL: LIMERICK CITY	93.5	-34.9	58.6	40.8	17.8	-	1,723
Crescent Shopping Centre (Tesco)	16.3	-46.4	-30.2	0.0	-30.2	10,304	-2,929
Rest of Limerick - Suburbs (excludes City)	15.9	-52.6	-36.7	108.1	-144.8	10,304	-14,051
Rest of County	23.7	8.8	32.5	13.1	19.4	10,304	1,886
SUB TOTAL: LIMERICK COUNTY	55.9	-90.2	-34.3	121.2	-155.5	-	-15,094
Ennis	51.6	43.2	94.8	10.5	84.3	10,304	8,185
Shannon	4.2	-0.3	3.9	35.3	-31.4	10,304	-3,050
Rest of County	15.1	-29.3	-14.1	25.8	-39.9	10,304	-3,876
SUB TOTAL: CLARE COUNTY	70.9	13.6	84.6	71.6	13.0	-	1,260
NORTH TIPPERARY	37.6	-39.2	-1.6	59.6	-61.2	10,304	-5,940
TOTAL: MID WEST	257.9	-150.7	107.2	293.2	-186.0		-18,051

Notes:

(1) Details and estimated 2022 turnovers of convenience goods floorspace commitments are set out in Appendix 5C.

(2) The derivation of our 2022 benchmark centre sales density estimates are set out in Section 5 of the main report.

DRAFT
RETAIL STRATEGY FOR THE
MID WEST REGION
2010-2016

APPENDIX 7

**Influences On The Update Of
The Retail Strategy**

This Appendix describes the main influences that have shaped the preparation of the update to the Mid West Region retail planning strategy which is set out in full in Section 6. The influences may be grouped under the following headings which are considered in turn:-

- the UK retail planning system;
- Irish national policy;
- existing policy and strategies within the Mid West Region.

Influences from the UK Retail Planning System

The UK planning system has undergone a considerable transformation over the past 20 years. The Government has learnt from the past mistake of letting traditional town centres uses be moved to out of centre locations and the clear message from Government is the protection of the vitality and viability of its town centres.

The onus is now clearly on promoting development in towns centres first, followed by edge of centre and out of centre locations only where there are no suitable and viable town centre sites available (the sequential approach). Outside of town centres, developers have to demonstrate there is a need for the development; that it is in the most sequentially preferable location; it is of the right scale, and; the impact on neighbouring centres will not undermine their continued trading health. There have however been recent questions about the unintended impacts of the requirement to demonstrate 'need' restricting competition and consequently a review of the policy is expected to remove the need assessment but enhance the impact assessment.

The new Retail Strategy aims to set out key retail tests which should be adhered to in all large retail applications. These key tests are stringently applied in the UK system and, although it does not totally exclude retail development out of town, it does allow the local authority more control about where development should occur in a way which protects the vitality and viability of existing town centres without unnecessarily curtailing growth.

The planning system and the commercial realities of development have to interact but in some instances they have conflicting interests. Neither can achieve their interests without the other and establishing this balance is one of the most difficult aspects of retail planning for local authorities.

The Mid West Region has successfully facilitated new retail floorspace in its main centres in retail years. However, the scale of the retail development pipeline leaves limited capacity for further retail floorspace other than that already planned as part of recognised city and town centre growth or that already committed.

Irish National Policy Influences

2002 National Spatial Strategy

The National Spatial Strategy (NSS) was launched by the Government in November 2002 to provide a strategic vision for the spatial development of Ireland for the period 2002-2020, focusing on people, places and communities. The NSS aims to achieve a better balance of social, economic and physical development across Ireland, supported by more effective planning.

The strategy recognises that there has been a significant growth in economic, social and physical progress which has not been balanced across the regions. Whilst the Greater Dublin Area is considered to have contributed significantly to Ireland's recent growth and prosperity, other places and areas within Ireland need to be recognised on a national and international scale. The NSS therefore seeks to ensure that for the period 2002-2020 a more balanced pattern of development emerges, identified as 'balanced regional development'.

The definition of 'balanced regional development', as provided in the NSS, is as follows:

“Developing the full potential of each area to contribute to the optimal performance of the State as a whole economically, socially and environmentally.”

Unbalanced development ultimately affects the quality of life, for example long journeys to work, services, leisure facilities etc, and affects the vibrancy and attractiveness of towns and villages for residents and visitors. Appropriate land use policies are therefore required in order to guide the appropriate development to a suitable location. In order to provide successful, vibrant and sustainable cities, towns and villages they need to be physically compact with good access to public transport.

National Development Plan

The National Development Plan 2007 – 2013 'Transforming Ireland – A Better Quality of Life for All' is a 20 year planning framework designed to improve the balance of social, economic and physical development and population growth between the regions. It plans for investment to provide not only the physical infrastructure to support progress, but also investment in education, science, technology and innovation. The Plan has four objectives:

- to continue sustainable national economic and employment growth;
- to strengthen and improve Ireland's international competitiveness;
- to foster balanced regional development;
- to promote social inclusion.

Transport 21 is the capital investment programme of the National Development plan through which the transport system will be developed. It operates two schemes, one for the Greater Dublin Area and one for the rest of Ireland. Transport 21 has four main objectives of its own:

- to create a high quality, efficient national road and rail network consistent with the objectives of the National Spatial Strategy;
- to provide for a significant increase in public transport use in provincial cities;
- to strengthen national, regional and local public transport services;
- to enhance safety and security facilities at the regional airports.

A number of significant infrastructure projects have been recently completed or are currently underway through this programme in the study area, including:-

- 37 km of dual carriageway and 16km of two lane national primary route opened between 2001 and 2006 (including Limerick Southern Ring Road Phase 1 opened May 2004);
- Ennis by-pass completed Jan 2007;
- N24 Cahir by-pass opened October 2007;
- N8 Cashel to Mitchelstown opened July 2008;
- N7 Neenagh to Limerick upgrade due for completion mid 2009;

- Phase 2 of Limerick South Ring Road (including the Limerick Tunnel) linking the Dublin Road N7 to the Ennis Road N18 due for completion end 2010;
- N18 Crusheen to Gort bypass started 2009;
- Preliminary studies on improvements to the N20, N21 and N24 routes;
- Improvements to non-national roads including the R353 Ennis to Portumna and R462 Tulla to Kikishen routes;
- Rural transport Programme providing funding for flexible door to door services providing regular access to shopping, health services, education, day care and social activities;
- Accessible Public Transport improvements making public transport accessible for all users;
- Phase 1 of the Western Rail Corridor renewal (from Ennis to Athenry) bringing 36 miles of track back into service with trains due to start running in August 2009.
- Phases 2 and 3 of the Western Rail corridor to be completed by 2011 and 2014 respectively (subject to funding allocations available in the current economic climate) which will eventually link Ennis to Claremorris via Athenry and Tuam and other new intermediate stations.

Retail Planning Guidelines for Local Authorities (2005)

The Retail Planning Guidelines, originally published in 2000 but were updated in February 2005 to include an additional guidance on large retail warehouse development (para 26). The Guidelines provide a comprehensive framework to guide local authorities in the preparation of Development Plans and the assessment of applications for planning permission. Planning authorities are statutorily required to have regard to the Guidelines in the performance of their functions.

The Guidelines identify a four tier national retail hierarchy reflecting the scale of development across the country. The classification is indicative and as the specific retail functions provided by each tier overlap, there are no clearly defined cut off points between the tiers. The retail hierarchy is set out in Table 2.6 in the main report.

The Guidelines identify five policy objectives:

- i) To ensure that all Development Plans incorporate clear policies and proposals for retail development;
- ii) To facilitate a competitive and healthy environment for the retail industry;
- iii) To promote forms of development which are easily accessible – particularly by public transport – in a location which encourages multipurpose shopping, business and leisure trips on the same journey;
- iv) To support the continuing role of town and district centres;
- v) To introduce a policy presumption against large retail centres located adjacent or close to existing new or planned national roads/motorways.

When applying these objectives, the Guidelines indicate that it is not the purpose of the planning system to inhibit competition, preserve existing commercial interests or prevent innovations. The guidelines should therefore be interpreted in a way which avoids local authorities taking actions which would adversely affect competition in the retail market.

The Guidelines introduced the ‘sequential test in to Ireland. The preferred location for new retail development should be on sites available within town centres, the next preference should be a location on the edge of centres. Only where there are no sites or potential sites within a town centre or on its edge, or satisfactory transport accessibility (including Park and Ride) cannot be realistically ensured within a reasonable period, should out of centre development be contemplated. As a limited exception to the presumption against out of centre development, large retail warehouses may be considered for locations close to national roads/motorway networks where the proposed development would be situated in an Integrated Area Plan in a Gateway (designated by National Spatial Strategy) and where the road network has sufficient capacity for the scale of development proposed.

Development Plans

The Guidelines set out those matters which are to be included in all future Development Plans for Counties and Cities;

INFLUENCES ON THE UPDATE OF THE RETAIL STRATEGY

- i) Confirmation of the retail hierarchy, the role of centres and the size of the main town centres;
- ii) Definition of Development Plan of the boundaries of the Core Shopping Areas of town centres;
- iii) A broad assessment will be a requirement for additional retail floorspace;
- iv) Strategic Guidance on the location and scale of retail development;
- v) Preparation of policies and action initiatives to encourage the improvement of town centres;
- vi) Identification of criteria for the assessment of retail developments.

The Guidelines specifically identify those counties and cities which should jointly prepare comprehensive retail strategies. These include:

AREA	RELEVANT COUNTY OR CITY
Limerick	County Limerick
	County Clare
	Limerick City Council

The background studies to underpin the retail planning strategy should define the boundaries of the areas to be covered and should assess the broad requirement for additional development over the plan period.

Floorspace Caps

Floorspace limits on the size of individual new stores are set in the Guidelines. For convenience stores (outside the Greater Dublin Area) the floorspace cap is set at 3,000 sq m. Similarly the floorspace cap for retail warehouses is 6,000 sq m sales floorspace except in areas subject of Integrated Area Plans (including Limerick City Council) and certain specified towns (including Shannon). Any proposals for individual retail warehouses with a floorspace in excess of 6,000 sq m gross in an area subject to an Integrated Area Plan would need to demonstrate that the proposal will:

- i) Be located close to a road network with sufficient capacity to cater for development of the scale proposed;

- ii) Be served by existing or planned public transport services;
- iii) Make adequate provision for those opting for home delivery of goods;
- iv) Be accompanied by a Traffic Impact Assessment;
- v) Take account of the vitality and viability criteria in respect of city and town centres as set out in the Guidelines.

Regional Planning Policy

The Mid-West Regional Strategy and Regional Planning Guidelines were issued in May 2004. They set out provision for the Mid-West comprising Clare County, Limerick City and County and North Tipperary. It has identified eight key mechanisms which need to be activated to achieve a 'regional of excellence for working, learning, leisure and living'. These are:

- Vision
- Connectivity
- World class places and products
- Enterprise enablers
- Balance
- Sustainability
- Quality of life
- Creation of new growth areas

The strategy identifies three potential development options, recommending Option 3 as it draws together the benefits of the other two.

Option 3:-

'Development of a strong core in Limerick/Ennis/Shannon complimented by other key regional towns with encouragement of development in other centres and in rural areas of the region'.

The Strategy identified nine sub-zones to be developed in ways that reflect their particular characteristics. These are as follows:-

INFLUENCES ON THE UPDATE OF THE RETAIL STRATEGY

Zone 1 – Limerick/Ennis/Shannon

Zone 2 – Outer Core Area

Zone 3 – West Clare

Zone 4 – North Clare

Zone 5 – West Limerick

Zone 6 – East Tipperary

Zone 7 – North West Tipperary

Zone 8 – North East Clare

Zone 9 – South Limerick

Additionally, the region also contains a number of special areas that cross county boundaries and require co-ordinated development. There are eight special areas identified:-

- Limerick/Ennis/Shannon
- Shannon Estuary
- Loughderg
- Burren
- Atlantic Coast
- Galtees and Ballyhoura
- Slieve Aughty
- Slieve Felim

Reference is made to the existing Regional Retail Strategy which identifies the main strategic retail centres, recommending where major retailing development should take place. The principle centres are the Limerick/Ennis/Shannon area; however this should not inhibit the capacity of smaller centres to provide facilities appropriate to their size and scale. The retail strategy guides the location of new retail development; however one of the issues that remain to be addressed is the extent and size of development that should occur in various parts of the Limerick/Ennis/Shannon area.

The Regional Planning Guidelines are made with the requirements of the Planning Development Act 2000 (The Act). They are also based upon the analysis of the development strategy. Their aim is to provide a broad context within which the physical planning of the region can be co-

ordinated and to provide a planning framework for the County, City and Town authorities which implement the Act at a local level. They also aim to facilitate the provision of the physical and infrastructure requirements to secure the social and economic laws identified in the vision.

The Regional Planning Guidelines refer to the Retail Planning Guidelines which should be used to manage the provision of major retail developments. The regional guidelines state that even where the precise levels of provision have not been identified for particular areas within the Limerick/Ennis/Shannon area retail planning decisions which still reflect a regional policy framework. In general retail provision should be made in accordance with the developing needs of the area.

Regional Retail Strategy

The Retail Strategy for the Mid West Region 2002 – 2011 was prepared by DTZ Piedad Consulting in February 2003. The purpose of the strategy is to set out an integrated strategic framework for retail planning across the region over the period up to 2011, which would be translated at County/City level into retail strategies and Development Plan variations specific to the different authority areas. The overall objective of the strategy is to provide strategic guidance on the location and scale of new retail development and to achieve a distribution which is efficient, equitable and sustainable.

The strategy defines a hierarchy for the mid west based upon the Retail Planning Guidelines national hierarchy and a detailed review of existing settlement characteristics. This hierarchy is shown below:-

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The Mid West Retail Hierarchy

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

The strategy adopts the approach of the national retail planning guidelines in that it advocates a town centres first strategy through the adoption of the “sequential approach”. It assumes however that the net share of expenditure available to town centres will remain constant based on current shopping patterns over the timescale of the Strategy. The Limerick Metropolitan Area is considered as an integrated retail planning unit requiring a joint approach by the City Council and Limerick and Clare County Councils. The Strategy acknowledges that Limerick, with Shannon, is identified as a “gateway” in the National Spatial Strategy, and accordingly concludes it is important that the needs of the Metropolitan Area are looked at to 2011 and beyond in terms of retail planning. New retail floorspace should predominantly sell comparison goods if the offer is to remain competitive to both visitors and residents. In the period to 2006 and early post 2007, the strategy concludes that the majority of new retail floorspace will need to be located in the city’s environs if the Metropolitan Area’s role of importance is to be sustained. Furthermore, this is where most of the new convenience floorspace should be located.

The Strategy concludes that the potential for the remainder of Limerick County Area is also significant, given the limited offer that currently exists. It identifies a need to strengthen both the quality and quantum of convenience floorspace in the main centres. First priority for both comparison and convenience shopping should be in Newcastle West, however, this should not prejudice the delivery of convenience, comparison and mixed developments in the other centres.

West respect to Clare County, the distribution of the new large scale retail floorspace should be focussed on Ennis and Shannon, their importance recognising their designation as a ‘hub’ and ‘linked gateway’ respectively in the National spatial Strategy. Again however the priority afforded to these two centres should not prevent further retail development in Killrush or lower order centres that is appropriate to their role and function. Clare is however predominantly a rural County and accordingly it is important for the Strategy to encourage the enhancement of retail provision across the County in accordance with the County Development Board’s Integrated Strategy for Social, Economic and Cultural Development.

Statutory Development Plans

Retail development is primarily regulated through the Development Control process and the acceptance of retail development at a particular location depends on the policy and zoning provision within the different County and City plans.

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Under Part II Chapter 1 of the Local Government (Planning and Development) Act 2000, planning authorities have a statutory duty to produce a Development Plan for their functional area every six years.

The purpose of a Development Plan is to provide a strategic framework for sustainable development to ensure growth takes place in a co-ordinated and integrated manner, whilst protecting, preserving and enhancing the intrinsic character, heritage and amenity of an area and making a positive contribution to an improvement in the quality of life.

A Development Plan must include the zoning of land for the use of particular areas for specific uses within the respective settlement boundary. New retail development is mainly regulated through the development control process and the determination of whether a proposed retail development is acceptable is highly dependant upon the relevant policies and the zoning of the respective development plan. Therefore the zoning strategy within the Development Plans is a key factor to retail planning strategy.

A summary of Development Plan zoning and settlement hierarchies is set out in **Appendix 8C**.

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RETAIL STRATEGY FOR THE
MID WEST REGION
2010-2016

APPENDIX 8

List of Public Submissions Received

Retail Strategy Submissions

1. Submission from **Cllr. Kevin Kiely, Limerick City** – Re: Coonagh Cross Shopping Centre
2. Submission from Simon Clear & Associates, Planning & Development Consultants **on behalf of STC Developments Ltd**, Unit 46, Shannon Town Centre, Shannon, Co. Clare – Re: Regarding the designation of core retail areas in urban settlements across the region
3. Submission from Declan Brassil and Company Limited **on behalf of Crystal Partners Limited**. The key points they wish to focus on are –
 - Need for the Review
 - Focus on Clare
 - Addressing the Market
4. Submission from Cunnane Stratton Reynolds, Land Planning & Design **on behalf of Mr. Paul O’Brien and Mr. Robert Butler, Dough Hotels Limited**, c/o Mount Kennett House, Henry Street, Limerick – Re: With regard to his site, the South Court Hotel, Gouldavoher, Raheen, Co. Limerick
5. Submission from **Tiernan Properties**, Arthurs Quay House, Arthurs Quay, Limerick – Re: Extent of Out of Centre Retail Development in Limerick
6. Submission from Brendan McGrath & Associates, Planning Consultants **on behalf of Finn Properties Ltd.**, Galvone Business Park, Limerick – Re: The Retail Hierarchy
7. Submission from HRA/Planning, Limerick **on behalf of Ballynew Developments Limited** – Re: Lands at Old Texaco Site, Clondrinagh
8. Submission from HRA/Planning, Limerick **on behalf of Cressington Developments Limited** – Re: In relation to lands on the Limerick Clare Border
9. Submission from **Minister Willie O’Dea, T.D.**, - Re- Coonagh Cross Shopping Centre
10. Submission from **Michael Noonan, T.D.**, - Re – Coonagh Cross Shopping Centre
11. Submission from HRA/Planning, Limerick **on behalf of the Limerick Southside Regeneration Agency**, Limerick – Re: Lands located around Roxboro Roundabout
12. Submission from the Development Planning Partnership, 15 Harcourt Street, Dublin 2 **on behalf of Chieftain Construction Ltd/Tesco Ireland** - Re: Tesco Presence in the Mid West Region/Coonagh Cross, Ennis Road, Limerick

13. Submission from Cunnane Stratton Reynolds, Land Planning & Design,
on behalf of Greenband Investments and Sean Halpin – Re: In respect of
lands at Smithstown, Shannon, Co. Clare