



Clare County Development Plan 2023–2029

Volume 7 Clare Retail Strategy

Interim Version

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COMHAIRLE CONTAE AN CHLÁIR
CLARE COUNTY COUNCIL



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1 Introduction

This retail strategy report has been prepared by KPMG Future Analytics on behalf of Clare County Council in accordance with provisions set out in National and Regional Policy and in the ‘Retail Planning Guidelines for Planning Authorities’ published by the Department of the Environment, Heritage and Local Government (DoEHLG) in 2012. The Strategy’s overall study area is made up of three component parts as shown on Figure 1-1, which consist of,

- Limerick Shannon Metropolitan Area
- County Limerick, excluding the area within the Limerick Shannon Metropolitan Area
- County Clare, excluding the area within the Limerick Shannon Metropolitan Area
- This Retail Strategy has been prepared concurrently with the Retail Strategy for County Limerick on behalf of Limerick City & County Council, which also covers the Limerick-Shannon Metropolitan area. The process for the preparation of the Retail Strategies for the two counties has been undertaken in accordance with the RSES for the Southern Region, and to deliver on Limerick-Shannon MASP Policy Objective 17. In addition, the Retail Planning Guidelines 2012 provides recommendations for a Joint Retail Strategy in order to form a coherent and integrated assessment of retail catchments that straddle and transcend administrative boundaries. The joint strategy is presented in two separate reports, which reflects that the study informs two separate statutory development plan processes for the two separate functional areas.

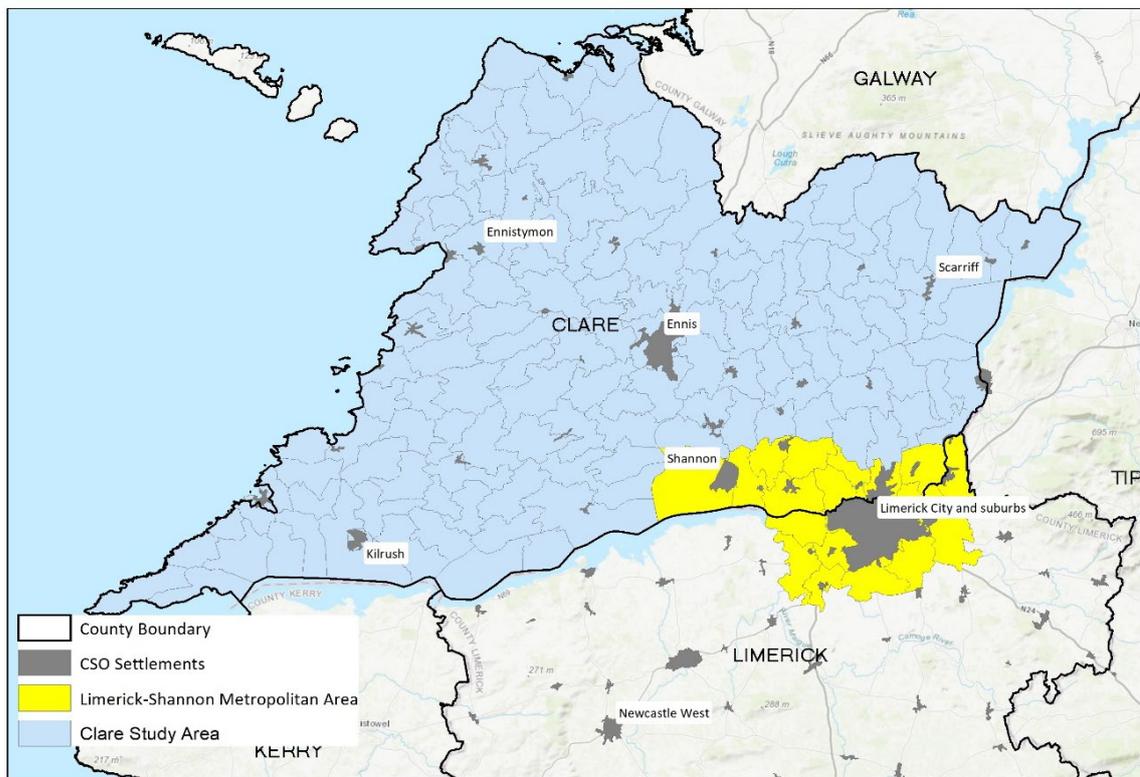


Figure 1-1: Study Area

The overriding aim of the strategy is to create the appropriate conditions necessary to foster a healthy and vibrant retail environment in County Clare to help improve the retail environment, enhance the vitality of urban areas and effectively manage and support positive change.

1.1 Structure and key outputs

The following overall structure applies to this report and is summarised below:

Table 1.1: Structure of Draft Retail Strategy Report

Section 1	Introduction
Section 2	National, Regional and Local Policy Context
Section 3	Current Retail Trends
Section 4	Shopper and Household Retail Surveys
Section 5	Town Centre Health Checks
Section 6	Projected Retail Floorspace Requirements
Section 7	Retail Planning Policies and Criteria for Assessment
Section 8	Conclusion

The key outputs of this retail strategy are as follows,

- i. Analysis of national and regional retail policy and national and regional retail trends.
- ii. Analysis of the change that has occurred in retailing within the study area since the last Strategy.
- iii. Household surveys, shopper surveys, online surveys and pedestrian counts.
- iv. An analysis of current shopping patterns in County Clare and portions of its study area overlapping into County Limerick.
- v. Town ‘health checks’ including recommendations with regard to improving the health, vitality and viability
- vi. Identify the main components of the regional and County Retail Hierarchy.
- vii. Identify the main components of the Retail Hierarchy of the county including district centres if any within the main settlements where appropriate.
- viii. Identify the level and form of retailing activity appropriate to all the components of the Retail Hierarchy and also any district centres if applicable within the identified settlements.
- ix. Define, by way of a map, the boundaries of the core retail areas of the main town/village settlements and also the location of any district centres.
- x. Prepare a quantitative assessment of the requirement for additional retail floorspace (square metres) on a catchment basis for each of the settlements.
- xi. Provide strategic guidance on the location and scale of retail development to support the retail hierarchy (town centre and district centre, villages, rural areas).
- xii. Identify opportunity sites in each of the settlements which could be used to suit the variety of required retail formats including requirements for large floor plate and modern retail format.

- xiii. Development Management criteria tailored for each of the settlements having regard to the findings above where appropriate.
- xiv. Appropriate development plan policies/objectives necessary for ensuring vital and vibrant town and village centres.

1.2 Approach

The approach undertaken in preparing the Retail Strategy establishes the retail market dynamics at play and the retail needs of the study area’s residents. It has been prepared in keeping with the local, regional and national guidelines in its approach to establishing the quantitative underpinning for existing and future retail capacity. The areas examined are:

The Limerick-Shannon Metropolitan Area;

County Clare, excluding the area within the Limerick Shannon Metropolitan Area;

The methodology in Figure 1-2 was used to establish the quantitative assessment of the requirement for additional retail floorspace for the three study areas and recommendations for the future distribution of this additional floorspace taking account of the existing retail hierarchy in the Counties.

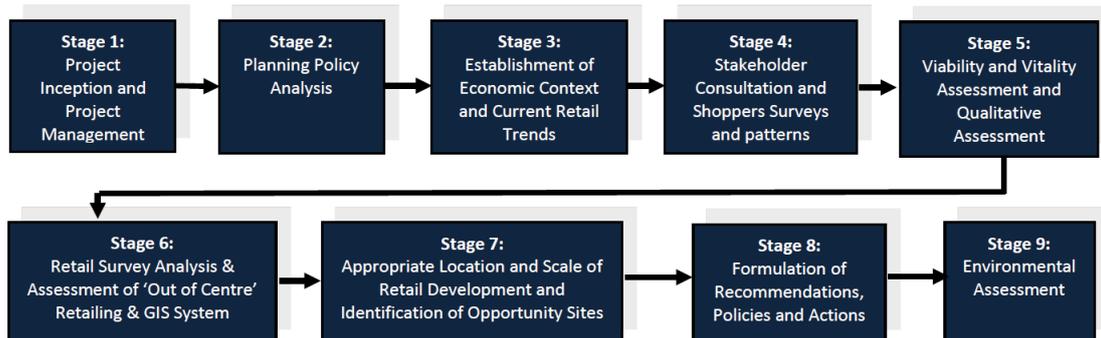


Figure 1-2: Proposed methodology

This proposed methodology ensured the complete delivery of a clear and coherent draft retail strategy, with reference to retail planning and policy framework with regards to the Retail Planning Guidelines 2012, RSES for the Southern Region, market interest in new retail development, the changing population, the need to meet needs and expectations, the need for workforce retention, the maximisation of the central national position, ensuring the delivery of economic activity, consideration of increasing urbanisation, the identification of new locations of retail activity and opportunities, and the consideration of retail vacancy issues.

1.3 Defining Study and Catchment Areas

For the purpose of this assessment County Clare has been subdivided into the following four retail catchment areas, together with the Limerick Catchment portion that overlaps into County Clare:

- County Clare
 - Ennis Catchment
 - Ennistymon Catchment
 - Kilrush Catchment
 - Scariff Catchment
- County Limerick
 - Limerick Catchment¹

Further detail on the derivation of each catchment is available in Section 6.2.1. Figure 1-3 below shows the catchment overview across both Counties.

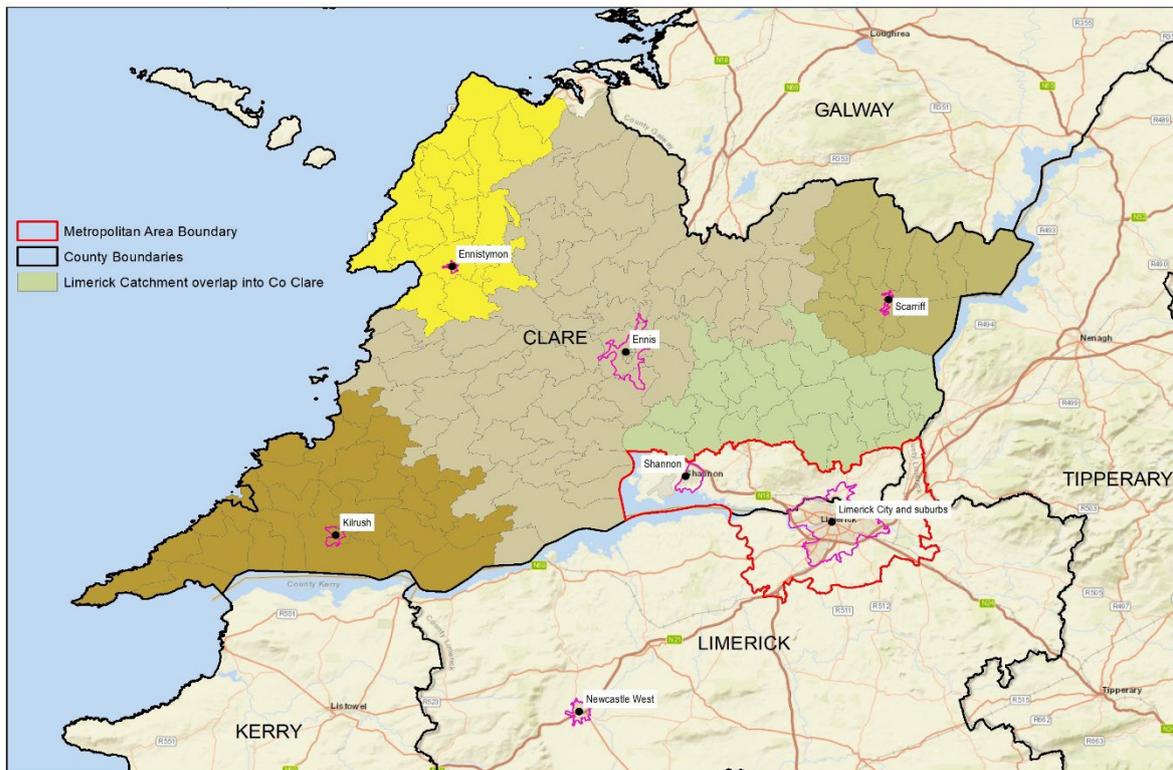


Figure 1-3: Retail Study Catchment Areas

¹ The 'Limerick Catchment' includes Limerick City and Suburbs, the Metropolitan area and parts of both County Limerick and County Clare.

2 National, Regional and Local Policy Context

The aim of this section is to provide an outline summary of the main policy documents that will shape the development of the Limerick – Shannon Metropolitan Area and County Clare Retail Strategy. It is necessary to have consideration to development trends already established via overarching regional and national strategies, and to incorporate them into this policy document.

This ensures that a balanced and comprehensive approach is taken to retail development in the Mid-West region, taking into consideration external influences and other economic sectors. The following are some of the key policy documents to be reviewed that are relevant to the development of a Retail Strategy for County Clare:

Table 2.1: Policy context review

National	<ul style="list-style-type: none"> - National Planning Framework – Project Ireland 2040 Our Plan - National Development Plan 2018-2027 - Retail Planning Guidelines (2012) - Retail Design Manual 2012 - Framework for Town Centre Renewal 2017 - Realising Our Rural Potential, Action Plan for Rural Development - Rural Regeneration and Development Fund - Urban Regeneration and Development Fund
Regional	<ul style="list-style-type: none"> - Regional Spatial and Economic Strategy for the Southern Region 2020 - Mid-West Area Strategic Plan 2012-2030 - Retail Strategies of adjoining Local Authorities
Local	<ul style="list-style-type: none"> - Clare County Development Plan 2017-2023 (as varied) - Ennis Municipal District Plan (Volume 3a of County Development Plan) - Shannon Municipal District Plan (Volume 3b of County Development Plan) - Killaloe Municipal District Plan (Volume 3c of County Development Plan) - West Clare Municipal District Plan (Volume 3d of County Development Plan) - Shannon Town and Environs Local Area Plan 2012 - 2018 (Extended to 2022) as amended

2.1 National Policy Context

The following section outlines the primary National policy that guides retail planning in Ireland. It includes the over-arching State plans and strategies as well as retail-specific guidelines. Analysis of the implications for Mid-West region of these policies is included.

2.1.1 National Planning Framework – Ireland 2040 Our Plan

The National Planning Framework (NPF) is a high-level strategy that will shape Ireland’s growth and development up to the year 2040. Drawing upon lessons learned from the implementation of the National Spatial Strategy 2002-2022, the NPF calls for a shift from an uncoordinated “business as usual” approach to planning and provides a framework for the sustainable development of Ireland’s existing settlements.

In terms of Ireland’s future population, the NPF sets out a population target for the Southern Region of 340,000-380,000 additional people i.e. a population of almost 2 million by 2040. It is projected that around 225,000 additional jobs i.e. at least 880,000 in total will be required to sustain this level of population growth.

National Policy Objective 5 seeks to *Develop cities and towns of sufficient scale and quality to compete internationally and to be drivers of national and regional growth, investment and prosperity.*

National Policy Objective 6 aims to *Regenerate and rejuvenate cities, towns and villages of all types and scale as environmental assets, that can accommodate changing roles and functions, increased residential population and employment activity....*

2.1.2 National Development Plan 2018-2027

The overarching aim of the National Development Plan 2018 - 2027 is to act as a driver for “*Ireland’s long-term economic, environmental and social progress across all parts of the country over the next decade*”. The NDP sets out the investment priorities that will underpin the implementation of the NPF, through a total investment of approximately €116 billion. This represents a very substantial commitment of resources which will provide essential infrastructure envisaged by the 10 National Strategic Outcomes (NSO).

NSO 3 seeks to Strengthen Rural Economies and Communities and is underpinned by Strategic Investment Priority 3 (SIP) which will support regional towns throughout County Clare. The high level of capital spending will strengthen regional development within the mid-west region.

2.1.3 Realising Our Rural Potential, Action Plan for Rural Development

The Action Plan for Rural Development was published in November 2018 with the primary aim of unlocking the potential of rural Ireland through a framework of supports at national and local level. It seeks to ensure that those who live in rural areas have increased opportunities for employment locally, access to public services and social networks that support a high quality of life.

It recognises the varying typologies of rural areas and that each can have different needs, requiring different solutions depending on their local assets, their peripherality and population density. However, it is also acknowledged that there are common issues affecting rural parts of Ireland throughout the country and as such provides a range of policy interventions to help support communities in rural Ireland.

2.1.4 Retail Planning Guidelines (2012) and Retail Design Manual (2012)

The third iteration of the *Retail Planning Guidelines* were published in 2012 by the Department of the Environment, Community and Local Government and accompanied by the *Retail Design Manual* (2012).

The guidelines provide a framework for regional and local authorities in preparation of policies and County Development Plans, to allow planning authorities assess planning applications, and to assist developers and retailers in formulating development proposals.

- The guidelines outline five key policy objectives as follows;
- Ensure retail development is plan-led;
- Promotion of city/town centre vitality through a sequential approach to planning;
- Secure competitiveness in retail sector through the enabling of quality development in suitable locations;
- Facilitate the shift towards easier access to retail via public transport, cycling and walking; and
- Delivering quality urban design.
-

One of the key tools to enable the above objectives is the requirement for the preparation of Retail Strategies to inform the Development Plans, by prescribing levels and form of additional retail floorspace and identifying a retail hierarchy. Through this, the guidelines state that applications for retail development are to be in line with the role and function of the settlements identified in the retail hierarchy.

Any proposal should also accord with the scale and type of retail development identified in the retail strategy to support the vitality and viability of these settlements. A presumption against large out-of-town retail centres is further identified. Retail Impact and Traffic Impact Assessments are also required to accompany planning applications ensuring any potential impact on existing retail and in particular the vibrancy and vitality of the town centre is avoided.

The guidelines state that planning applications should be assessed using the ‘Sequential Test’. The overall preferred location for new retail development is within city and town centres. Retail development may also be appropriate within District Centres identified in the settlement hierarchy at a scale appropriate to the needs of the area.

Only where the applicant can demonstrate and the planning authority is satisfied, that there are no sites or potential sites within a city, town centre or designated district centre should an edge-of-centre site be considered.

In addition, only in exceptional circumstances where it can be demonstrated that there are no sites or potential sites available either within the centre or on the edge of these centres should an out-of-centre site be considered. With regard to classification of location for retail development the 2012 Retail Planning Guidelines provides clear guidance as follows:

- Retail Area

That part of a town centre which is primarily devoted to shopping.

— Centre

For the purposes of these guidelines, a centre refers to a city or town centre and can also, refer to the centre of a district or neighbourhood centre which has been identified in the settlement hierarchy of a development plan

— Edge-of-Centre

A location within easy walking distance of the primary retail area of a city centre, town centre or district centre. This distance should generally not exceed 300-400 metres. The appearance and perceived safety of the connection to edge-of-centre retail and the strength of attraction is also of relevance.

— Out-of-Centre

A location that is clearly separate from a town centre but within the town development boundary, as indicated in a development plan or local area plan.

The Retail Planning Guidelines also provide a classification of the types of retail goods categories, convenience and comparison. Annex 1 defines each category as follows:

— Convenience

This category includes all supermarkets, smaller convenience stores and retail food outlets (excluding fast food takeaways, restaurants and cafes) serving food, alcoholic and non-alcoholic beverages, tobacco and non-durable household goods.

— Comparison (Non-Bulky)

The list of goods which fall under this category is as follows: clothing & 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, goods not elsewhere classified and bulky goods.

— Comparison (Bulky)

While the bulky goods category is listed under the classification of comparison floorspace above, it is considered appropriate to make a distinction within the Retail Study between pure comparison floorspace and floorspace used for the sale of bulky goods.

The Annex 1 definition includes a (non-exhaustive) list of goods which are considered to fall within the bulky goods category as follows: Goods generally sold from retail warehouses where DIY goods or goods such as flat pack furniture are of such a size that they would normally be taken away by car and not be portable by customers travelling by foot, cycle or bus, or that a large area would be required to display them e.g. repair and maintenance materials, furniture and furnishings, carpets and other floor coverings, household appliances, tools and equipment for the house and garden, bulky nursery furniture and equipment including perambulators, bulky pet products such as kennels and aquariums, audio visual, photographic and information processing equipment, catalogue shops and other bulky durables for recreation and leisure.

With regard to the retailing and settlement hierarchy, the Retail Planning Guidelines advocate for the sustainable organisation of retail activity in Ireland to reflect the existing national settlement structure. Taking account of historical patterns, in addition to

preceding retail planning policies, the retail hierarchy should reflect the broad tiers of urban development recognising that such a system of classification is indicative only, with scope for overlap between the specific retail functions provided in each tier.

The Guidelines provided for a Convenience retail floorspace caps (net floor space) of 3,500m² in Limerick/Shannon, and - 3,000m² in the remainder of the State. These floorspace caps apply to new retail stores or extensions to existing stores. In these mixed comparison/convenience retailing there is no cap on the amount of non-grocery or comparison space. The retail warehouse floorspace cap is 6,000 m² gross and with specific criteria to allow for an exemption in city and town centre areas.

The importance of quality urban design is acknowledged in the Retail Planning Guidelines (2012). This is underlined further with the accompanying document, the *Retail Design Manual* (2012) which sets out key principles of urban design which might form the framework for policies to promote quality design in development plans and local area plans. *The Design Manual for Urban Roads and Streets* (2013) provides additional design guidance for public spaces, seeking to achieve integrated street design within urban areas that is influenced by the type of place in which the street is located, and balance the needs of all users. For retail development in the Mid-West region, given the historic street patterns and built form of the region's main towns, design is a key consideration and one which has and will continue to influence the success or otherwise of planning applications for retail developments. Integration with the existing street pattern and built form is therefore central to the ongoing vitality and viability of retail centres.

2.1.4.1 *Joint or Multi-Authority Retail Strategies*

The Retail Guidelines refer to the preparation of Joint Retail Strategies at section 3.5 and set out guidelines in Annex 3. It notes certain development plans and local area plans must be informed by joint or multi-authority retail strategies which should assess retail activity and demand needs that transcend planning authority boundaries.

To give these strategies statutory backing the policies and objectives of the strategy should be adopted into the development plan and local area plan as appropriate or adopted as a variation to a development plan. The joint or multi-authority retail strategies for urban areas identified in the guidelines must be prepared or reviewed as appropriate to inform the relevant development plan review process.

It is noted that this Retail Strategy has been commissioned as a Joint Retail Strategy for Limerick and Clare County Council as it applies to the Limerick-Shannon Metropolitan Area and for the remainder of Co. Clare. The analysis and policy recommendations set out in this strategy are based on the comprehensive review of data for both Counties Limerick and Clare. Given that the development plan adoption processes for the two counties are not synchronised, the Retail Strategy is being provided in separate documents with their respective plans.

2.1.5 **Framework for Town Centre Renewal (2017)**

The Framework for Town Centre Renewal prepared for the Retail Consultation Forum and published in April 2017 sets out an Action Plan for Town Centre Renewal. The Retail Consultation Forum was established in May 2014 under the Action Plan for Jobs 2014 to provide a platform for structured engagement between the retail sector and relevant

Government Departments. The forum is made up of a range of retail sector representatives and industry chief executives as well as public bodies including representatives from all relevant Government Departments.

The Framework for Town Centre Renewal is intended as a blueprint for towns and villages to guide their stakeholders (community organisations, businesses, residents, local authority, public agencies etc.) through the key stages of town centre renewal, including carrying out a town centre health check, preparing a Town Centre Plan, nominating a local business champion, adopting a place making strategy, ensuring strong occupancy and a pleasant visual appearance.

Other elements including securing financial supports for projects, optimising the potential for artisan food and craft supports, adopting a programme of events and promoting via online platforms to reach a wide audience including tourists. The above health checks and town centre plans would be community-driven initiatives, which aim to mobilise groups within towns to formulate their vision and action plan.

Health Checks and Town Plans may draw heavily on the content of County Retail Strategies; however, their focus would be wider than retail alone, and would examine all the stakeholders and influencing factors for town centres. Figure 2-1 below identifies the numerous health check indicators outlined in the Framework for Town Centre Renewal:

Figure 2-1: Health Check Indicators (Framework for Town Centre Renewal, DBEI 2017)



2.1.6 Rural Regeneration and Development Fund

As part of Project Ireland 2040, the Government has committed to providing an additional €1 billion for a new Rural Regeneration and Development Fund (“the Fund”) over the period 2019 to 2027. The Fund will provide investment to support rural renewal for suitable projects in towns and villages with a population of less than 10,000, and outlying areas. It will be administered by the Department of Rural and Community Development.

The fund supports the revitalisation of rural Ireland, to make a significant and sustainable impact on rural communities, and to address de-population in small rural towns, villages and rural areas. It will be a key instrument to support the objectives of the National Planning Framework, and in particular to achieve Strengthened Rural Economies and Communities - one of the National Strategic Outcomes of the NPF. Initial funding of €315 million is being allocated to the Fund on a phased basis over the period 2019 to 2022.

Under the Rural Regeneration and Development Fund €6.8 million has been allocated to Clare County Council for a range of different tourism and regeneration projects which will deliver on the targets of the Clare Rural Development Strategy.

2.1.7 Urban Regeneration and Development Fund

The Urban Regeneration and Development Fund (URDF) has been established to support more compact and sustainable development, through the regeneration and rejuvenation of Ireland's five cities and other large towns, in line with the objectives of the National Planning Framework and National Development Plan. Through the scheme €2 billion worth of funding has been made available up to 2027, with €130 million available for 2020 and €550 million available up to 2022.

Types of projects eligible for funding include, but are not limited to the acquisition, enabling and/or development of areas, sites and buildings, relocation of uses, public amenity works, community facilities, and infrastructure related to housing, economic or skills development (including enterprise and tourism), transport, services infrastructure and/or transition to a low carbon and climate resilient society, in an urban context.

Bid proposals must be co-funded and will require a minimum 25% stakeholder contribution. Bids must also demonstrate a further requirement for 100% (euro-for-euro) leveraging of committed wider private sector investment (i.e. development) arising from fund expenditure.

2.1.7.1 Funding allocation for Clare

In March 2021, the Government announced the commitment of €4m URDF funding for Ennis Town Centre. Compact growth was the focus of this round of URDF funding as a catalyst for regeneration and development. The projects the Government is funding are geared towards sustainable growth of our urban settlements, supported by jobs, houses, services and amenities, as envisaged by the National Planning Framework. The following projects were allocated funding as part of Call 2 of the URDF:

Table 2.2: URDF funding allocations for Ennis, March 2021

<p>Ennis Town Centre Public Realm Regeneration (Clare County Council) – €4.04 million</p>	<p>The project forms the next phase of works that will contribute to achieving an overall vision of a high quality, pedestrian-focussed public realm in the medieval core of Ennis Town centre. This project continues the regeneration work of Parnell Street and the extensive network of Lanes and Bow-ways in the town, works supported under the URDF ‘Call 1’-supported ‘Parnell Street and the Lanes and Bow-ways’ project.</p>
<p>O’Connell Square, High Street and Bank Place – civic space and public realm enhancements. These will include traffic calming, resurfacing and upgraded street furniture and planting.</p> <p>Old Barrack Street and Barrack Square – traffic calming measures, street trees, public artwork, and distinctive street furniture and lighting and canopy structure as a central feature.</p> <p>O’Connell Street – connectivity to the new civic areas at O’Connell Square and Barrack Street, street furniture, lighting and trees.</p> <p>These works will result in a safer and more attractive pedestrian environment. They will also result in spaces that can have a civic function. They will help revitalise the town centre as a destination, improving its vitality and enabling Ennis to capitalise on its existing assets.</p>	

The €4.04 million in approved funding is in addition to €4.10 million in approved URDF funding for three ‘Call 1’ projects: ‘The Venue Shannon (Strategic Masterplan)’; ‘Parnell Street and the Lanes and Bow-ways’; and ‘Barrack Square and Old Barrack Street and O’Connell Square and High Street’. Total URDF funding approved to date stands at €8.14 million

2.2 Regional Policy Context

The following section outlines the regional policies, which guide retail planning in Ireland. It includes the overarching regional plans and strategies as well as setting the regional settlement hierarchy including a classification of settlement in County Clare. Analysis is included of the implications of these policies for retail planning in County Clare.

2.2.1 Regional Spatial and Economic Strategy for the Southern Region

The Regional Spatial and Economic Strategy (RSES) for the Southern Region is a high-level document with the overarching aim of supporting the implementation of the NPF. It provides a strategic framework through which the policies and objectives of the NPF are delivered over a twelve-year period. As such, it will address spatial and economic issues around population growth, housing, employment, industrial and commercial

development, retail development and the identification of regional strengths and opportunities for growth.

The RSES promotes a co-ordinated, co-operative and collaborative approach between each of the Cities and Key Towns within the region through the establishment of Metropolitan Area Strategic Plans (MASPs) for Cork, Limerick-Shannon and Waterford Metropolitan Areas and the identification of several Key Towns.

The central key objectives are to support the “town centre” first approach in the context of the retail hierarchy, and to promote the vitality and viability of existing centres by focusing development in them and encouraging a wide range of services in a good environment which is accessible to all.

The Limerick-Shannon MASP seeks to support industrial, commercial and residential development and the maintenance and development of its public infrastructure and education services. The RSES identifies Shannon as a gateway to the West of Ireland. The RSES seeks to regenerate Shannon town centre to enhance the retail offer within the town.

Limerick - Shannon MASP Policy **Objective 10 b**,

It is an objective to enhance Shannon Town as an attractive residential centre through regeneration, active land management initiatives and the redevelopment of Shannon Town Centre.

Limerick - Shannon MASP Policy **Objective 17 d**,

- It is an objective to develop a distinct shopping character to increase Shannon’s attraction and to complement the retail function of Limerick City Centre.
-

Ennis is identified as a key town and the triangle of Limerick-Shannon-Ennis is recognised as the economic engine of the mid-west. RPO 13 looks to support economic, retail, commercial and residential development and the maintenance and development of its public infrastructure.

a) To support Ennis as a self-sustaining, regional economic driver and as a key location for investment choice in the region, to support its enhanced development based on its strategic location relative to Limerick and Galway Cities and Shannon International Airport, as well as its role as a centre of employment and economic activity within the Region. The RSES recognises that this should be supported and enhanced through initiatives such as the Atlantic Economic Corridor;

b) To support the implementation of Ennis 2040 to set the long-term economic strategy for the county town with an agreed focus on an economic future and spatial pattern to 2040 and beyond. The RSES recognises the higher education growth potential of Ennis and its vision to become a centre for lifelong learning;

c) To support the delivery of the infrastructural requirements identified for Ennis, subject to the outcome of the planning process and environmental assessments;

2.2.2 Mid-West Area Strategic Plan 2012-2030

The Mid-West Area Strategic Plan (MWASP) 2012-2030 will guide the physical and spatial development of the region to 2030. The overall aim of the strategic plan is to,

“provide a framework to help guide decision making with regard to the physical and spatial development of the Region to 2030, and to promote balanced growth throughout the region to achieve the maximum social, economic, health and cultural benefits for all its citizens”.

The MWASP acknowledges the Retail Strategy for The Mid-West Region 2010-2016. The spatial strategy has a focus of strengthening the Limerick Metropolitan Area, in particular the City Centre. The Retail Strategy highlights that Limerick City Centre has fallen behind other cities in the State and no longer performs to its Tier 1 Status in the shopping hierarchy. While the city centre is a key priority the plan also seeks to establish key settlements throughout the Midwest region and to maintain the rural economy and population base. The plan envisions the development of the Limerick / Shannon / Ennis axis as the engine and core of the region.

A key land use recommendation seeks development of two key Clare settlements within the region,

- *‘Develop Shannon and Ennis as complementary settlements pending a better balance of employment and population levels between the two’*

The MWASP notes that retail trade has declined within the region since 2007. Wholesale and retail trade decreased by 21% between 2007-2011. This was higher than the state which decreased by 13% within the same time period. Over 5,000 jobs were lost within this industry over the 4-year period which resulted in a major oversupply of retail floorspace within the Midwest region. The strategy outlines 10 key priorities, which will strengthen retail and ensure the mid-west region will be based on sustainable, economic, social equity and environmental drivers, which together will deliver an enhanced quality of life.

- 1 *To develop a smarter integrated regional approach*
- 2 *To improve the image of Limerick City and the Mid-West*
- 3 *To improve cost competitiveness*
- 4 *To take a cohesive approach improving infrastructure in terms of transport, business parks and broadband.*
- 5 *To support the development of Shannon Airport and the Shannon Estuary Ports*
- 6 *To enhance skills and education*
- 7 *To tackle growing unemployment.*
- 8 *To stimulate and support the enterprise, innovation and R&D environment*
- 9 *To ensure that agencies prioritise the Region*
- 10 *To have a single voice to leverage the power of a unified business network*

2.2.3 The Retail Strategy for the Mid-West Region 2010-2016

The Retail Strategy for the Mid-West Region 2010-2016 is the most recent retail strategy which is in effect being replaced by this current Retail Strategy. It is notable that it was prepared in 2009 at the start of the recession years during a period of significant economic decline and credit restrictions for public and private sectors.

It sought to provide a regional framework for the formulation of the policies and strategy in the County Development Plan and seek to ensure a balance between the different settlements in the region with regard to development, population and services.

The strategy highlighted that due to the sudden downturn in the economy, the previous Retail Strategy was over optimistic in its retail expenditure growth assumptions, overestimating population growth in the Mid-West and significantly under-estimated the growth in special forms of trading (including internet shopping).

It asserts that in practice, these floorspace need over-estimates were greatly exceeded by the quantum of new retail development actually built in the Mid-West; and that since 2002 the supply of retail floorspace had doubled to c.532,000 m² net. It concludes that the pace of new build combined with the economic downturn led to a huge over-supply of retail floorspace stock in the Mid-West of c.86,000 m² net.

It forecast a need within the region, for up to 7,600 m² net of additional non-bulky comparison goods floorspace by 2016 (rising to 42,500 m² net at 2022). For convenience goods no additional floorspace is required by 2016 but 10,404 m² net required by 2022.

Within Ennis it was identified that there was a need to increase its retail representation through modern shop units without having a negative impact on the towns attractive historic core. Additionally, an out of centre bulky goods retailing centre would support the town of Ennis.

At Shannon, the Masterplan proposals to extend the town centre to the north were supported. The potential to develop a distinct shopping character to increase the town's attraction as part of a linked Gateway with Limerick city centre was to be investigated.

General Strategy:

- The preferred location for new retail development where practicable and viable is within existing town centres (including district or major village centres) which includes those centres identified in Tiers 1 to 4 inclusive of both

Out of Centre Development

- In accordance with the town centre first approach, there is no need to allocate or approve further out of centre retail floorspace at the current time. Whilst there may be a need for further bulky comparison goods floorspace beyond 2016, this is sufficiently far off that a restrictive policy is appropriate until the Retail Strategy is next reviewed.
- Planning permission shall not be granted for the provision of any more out of centre retail floorspace;
- New food stores, including discount stores, should not be allowed to occupy out of centre sites but should be part of existing or new centres;
- New neighbourhood centres and/or local corner shops will be permitted to serve
- new areas of housing development or to meet areas of local deficiency.

Ennis

- Seek to improve the suitability of town centre retail accommodation for modern retailers, whilst preserving the town's attractive historic character;

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

Shannon

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

Kilrush

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

Ennistymon/Scariff/Killalloe

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

Neighbourhood and Village Centres

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

Local Shops

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

2.2.4 County Kerry Retail Strategy 2015-2021

The Kerry County Retail Strategy 2015-2021 notes that retail trade has declined in the county. Retail and shopping were once the heart of urban cores but the recent reduced demand for certain retailing has had a serious impact on their physical and social fabric, with online shopping and out of town retail centres impacting town centres. Tralee and Killarney sit at the top of the retail hierarchy and are classed as hub towns.

The Strategy aims to ensure that an appropriate range and quality of retail is provided in County Kerry, to ensure that trade is not drawn to regionally competing centres, most notably Limerick City and Cork City. It notes these centres offer a good range of retail facilities and generally have an attractive setting and that Cork City has developed attractive retail areas such as the Patrick Street as well as Princes Street, Oliver Plunkett Street and North Main Street.

2.2.5 Cork City Retail Strategy 2015-2021

The Cork City retail strategy covers the period 2015 to 2021. Cork City Centre is the principal retail centre of the South West Region and is positioned at the top of the retail hierarchy with a market share of 59.8% of comparison spend within the Metropolitan Area. The City Centre reported a notably high vacancy level of 31%. The level of vacancy is an important indicator of the health of a town centre and can have a detrimental impact on the visual appearance of a town centre. Level 2 District Centres are located in Cork City and County. The overarching Strategic Retail objectives are,

- a) To maintain and strengthen the role of Cork City Centre as the primary retail centre in the South-West region;
- b) To create vibrant mixed-use district centres within the suburbs;
- c) To provide good quality and accessible convenience goods shopping to all residents of the city.

One of the key requirements of the retail strategy is to provide a broad assessment of the additional retail floorspace required over the lifetime of their strategy. The quantum of additional retail floorspace calculated for Cork Metropolitan Area covering the 2015-2021 plan period is further identified as 43,173m² of additional convenience floorspace, 104,439m² of additional comparison floorspace and 57,555m² bulky goods floorspace by 2021.

2.2.6 North Tipperary County Retail Strategy 2010

The North Tipperary County Development Plan 2010 has the core aim 'To promote strong, competitive retail centres in accordance with the settlement and retail hierarchy of the county and to enhance and revitalise town centres as vibrant and viable place in which to live, work and visit'. The council recognises the functions of town centres have

been challenged and influenced by social and economic changes including out of town shopping centres, on-line shopping/banking etc, increased customer mobility and reduced disposable income.

The Strategy aims to ensure that an appropriate range and quality of retail is provided so that trade is not drawn to Limerick, Cork and Waterford. The county retail hierarchy forms the basis for the determination of the appropriate quantum and location of new retail development in the county in line with the county settlement strategy. Clonmel is classed as a Regional Town sits at the top of the retail hierarchy. The town performs an important convenience and comparison role in the county beyond its immediate catchment. It provides high quality comparison and convenience retail choice in the town with a dedicated shopping centre and retail warehouse parks. Nenagh and Thurles are identified as Sub Regional Towns. These towns have an important sub-regional role with a good range of convenience and comparison offer. They service a large rural catchment and are not expected to compete directly with each other or with Clonmel. Both towns have strong established central areas and their strengthening and environmental improvement is a priority.

District towns in Tipperary consist of Carrick on Suir, Roscrea, Tipperary, Cashel, Cahir and Templemore. These towns have important sub-county roles, with good choice in convenience and comparison retail offer. Existing vacancy has been identified in dedicated retail warehouse parks and some shopping centres. There are established central areas with varying levels of retail vacancy and the strengthening of and environmental improvement of these will be a priority.

2.2.7 Galway City Retail Strategy 2017-2023

Galway City and County retail strategy positions Galway City Centre at the top of the retail hierarchy as the principle retail area within the County. It has a substantial catchment area that extends out to the County and the wider regional area. Galway City Centre is followed by the County Towns of Tuam, Loughrea and Ballinasloe in the hierarchy. The importance of the three main towns in the county ensure that these are given highest level of importance which when expressed in terms of the joint assessment are at level 2. This accords with Objective R2 in the County Development Plan in relation to the retail hierarchy for which there is an objective to; *“Retain and further develop the higher order shopping functions in Tuam, Ballinasloe and Loughrea as the main retailing centres in the County”*.

A study was done on total net floorspace between 2011 and 2015. Within this timeframe there was a marginal decrease in the overall retail floorspace from 164,807m² to 162,259 m². Convenience retailing is the only area experiencing significant growth, with both comparison and bulky retailing decreasing. The quantum of additional retail floorspace required for Galway between 2017-2023 is 59,640m². 12,156m² additional convenience floorspace, 31,634m² comparison floorspace and 15,850m² bulky floorspace.

2.3 Local Policy Context

The following section outlines the primary local policy that guides retail planning within County Clare. It includes a brief analysis of the current Municipal District Plans and their environs as they relate to retail.

2.3.1 County Clare

2.3.1.1 Clare County Development Plan 2017-2023 (as varied)

The Clare County Development Plan 2017-2023 (as varied) has the aim of ‘*enhancing the quality of life for all people who live, work and visit County Clare*’. The retail goal for County Clare is to create,

‘viable and vibrant town and village centres, that have shopping areas and markets at appropriate scales and locations and which function to serve their communities and rural hinterlands’.

Under policy CDP 7.2 is the objective of the Development Plan to:

- a. To ensure that sufficient lands are appropriately zoned for retail development in the settlements of County Clare to support a level, quantum and form of retail activity that is appropriate to the position of the settlement on the Settlement Hierarchy for the County;
- b. To have regard to the guidance set out in ‘Retail Planning – Guidelines for Planning Authorities 2012’ in the assessment of development proposals for retail development.

Ennis

Ennis is the most significant retail urban centre in the Mid-West Region after Limerick City Centre. As the County Town of Clare, it is a traditional large town with shopping streets and public spaces containing a pleasant mix of cafes, bars, restaurants, speciality and fashion boutiques. There is an identified need for additional convenience and comparison floorspace in the Ennis area. CDP 7.3 outlines retail objectives for the town of Ennis,

- a) To prepare a detailed town centre development and improvement strategy for Ennis including town centre public realm enhancements, as part of a detailed local area plan for the town;
- b) To support the improvement of the suitability of Ennis town centre retail accommodation for modern retailers, whilst preserving the town’s attractive historic character;
- c) To facilitate the need for additional non-bulky comparison goods floorspace within the town centre, ensuring it is integrated into the existing shopping facilities;
- d) To harness the retail development potential of any appropriate opportunity/brownfield sites within the town centre;
- e) To maintain and expand the attractive network of independent fashion boutiques and other speciality shops in the town centre, which combined with the character of the town and its public spaces, creates a niche shopping experience for residents and tourists;
- f) To carefully consider qualitative factors in assessing the appropriate nature, scale and distribution of any future proposals for new retail development in Ennis town.

Shannon

At section 4.2 the County Plan notes Shannon is located approximately midway between Limerick and Ennis, between the catchment areas of the two largest shopping areas in the region. However, Shannon has many strengths as a retail destination in itself. It has

a sizeable workforce and resident population and has an international airport and brand name.

The Council seeks to encourage and facilitate the enhancement of both the town centre retail provision and the character of its environment in Shannon in order to improve the service to its local catchment.

It is recognised that Shannon has very little representation of ‘bulky comparison goods’ outlets. The provision of a distinct shopping area linked to tourism is an opportunity which should be examined. A masterplan is under preparation for the redevelopment and expansion of Shannon Town Centre. This masterplan will inform the future Shannon Town and Environs Local Area Plan. Development Plan Objective CDP 7.5 sets out the following in respect of Shannon Town Centre

- a. To support the continuing development of retail facilities in Shannon Town Centre through the delivery of the adopted local area plan;
- b. To encourage the growth of retail floorspace so that the town centre can improve its quality of service to its local catchment area;
- c. To examine the possibility of creating a distinct shopping character for the town centre, reflecting its Linked Gateway status and increasing its attractiveness to tourists, particularly those using the airport.

Additional Retail Floorspace in Shannon

The existing 2017-2023 County Plan states there is an identified requirement for additional convenience and comparison retail floorspace to serve Shannon town and the surrounding hinterland. The Shannon Town and Environs Local Area Plan 2012-2018 (as amended) identifies preferred sites for future retail development and also indicates the nature and extent of retail floorspace that can be accommodated in future development areas.

The existing retail strategy also sets out clear guidance for retail development for Service Towns, Small Towns, Large Villages, Small Villages and the countryside, outlining the type of retail development required. The plan seeks to support the “town centre” first approach in order to promote the vitality and viability of existing centres. Edge-of-centre retail developments will only be permitted where the development will strongly integrate into the existing town centre and will not have a negative impact on the vitality and viability of the relevant town centre. Out-of-centre retail developments will be actively discouraged.

Kilrush

Kilrush is classed as a Service Town within the County Clare Development Plan. Service Towns are drivers of growth and prosperity for their respective catchments, by consolidating their administrative, retail and service bases, protecting and enhancing their distinctive town centre characteristics and natural landscape settings, and maximising their role for subregional growth. It is an objective of the existing 2017-2023 Development Plan:

- a. To support Service Towns as important centres for the provision of convenience goods and retail services;
- b. To encourage the provision of good quality convenience outlets capable of supporting a main food shopping trip.

Kilrush attracts tourists which allows the town to support a wider range of comparison goods than would be justified by their local catchment population. It is not envisaged that

new edge-of-centre or out-of-centre convenience or non-bulky comparison retail developments will be required or permitted in Kilrush during the lifetime of the Clare County Development Plan 2017-2023.

Ennistymon/Lahinch

Ennistymon/Lahinch is a Service Town in County Clare and acts as an important service centre in its respective Municipal Districts and as a driver of growth within its surrounding hinterland. Ennistymon/Lahinch has the primary retail function of providing convenience retail options and everyday services for the local population. It is an objective of the existing 2017-2023 Development Plan:

- a) To support Service Towns as important centres for the provision of convenience goods and retail services;
- b) To encourage the provision of good quality convenience outlets capable of supporting a main food shopping trip

Lahinch benefits from tourist and visitor attraction which allows the town to support a wider range of comparison goods than would be justified by their local catchment population.

Scariff/Tuamagraney

Scariff/Tuamagraney is a Service Town located in east County Clare, adjacent to Lough Derg. The primary function of Service Towns is the provision of convenience goods and everyday services. It is an objective of the existing 2017-2023 Development Plan:

- a) To support Service Towns as important centres for the provision of convenience goods and retail services;
- b) To encourage the provision of good quality convenience outlets capable of supporting a main food shopping trip

The retail plan aims to ensure that there is an adequate amount of land zoned for retail development in the settlements of County Clare to support a level, quantum and form of retail activity that is appropriate to the position of the settlement on the Settlement Hierarchy for the County.

2.3.1.2 *Ennis Municipal District Plan (Volume 3a of the Clare County Development Plan 2017-2023 (as varied))*

The Ennis Municipal District plan provides advice regarding the quantum, scale and type of retail development required within the town. It considers these matters in detail and provides appropriate policies and actions regarding future retail development in Ennis accordingly. This plan aims to seek to preserve and support existing retail businesses and to enhance the retail offer in the town centre via a multifaceted approach to land-use planning and management. Successfully addressing interrelated land-use issues can create the physical environment for certainty and confidence around retail investment decisions in the town centre and positively impact on the type and amount of retail floor space required. It is a priority to focus on facilitating the potential for further retail growth and development in the town centre. It is not envisaged that edge-of-centre or out-of-centre convenience retail development will be required or permitted during the lifetime of this Plan.

The overarching retail policy objectives for Ennis seek,

- a) To protect and enhance the vitality and mix of Ennis town centre land-use activities;
- b) To improve the suitability of the Ennis town centre retail accommodation for modern retailers, whilst preserving the town's attractive historic character;
- c) To accommodate the need for additional non-bulky comparison goods floor space within the town centre or town centre expansion area, ensuring it is integrated into the existing shopping facilities;
- d) To provide for neighbourhood facilities to serve existing neighbourhoods and those planned for growth;
- e) To encourage a new focus of high quality out-of-centre bulky comparison retail warehousing provisions in identified areas, limiting the range of goods which can be sold from any new premises to those that will not compete with the town centre.

2.3.1.3 Shannon Municipal District Plan (Volume 3b of the Clare County Development Plan 2017-2023 (as varied))

Shannon is designated as a Tier 2, Level 2 major town centre and sits beneath Ennis on the hierarchy.

The plan highlights Shannon is the second largest town in the County and is defined by a number of components: Shannon Town, Shannon International Airport, Shannon Free Zone and Smithstown Industrial Estates. Shannon Town and Environs are of critical importance to the future economic development of the Mid-West Region.

The vision for Shannon is:

'A town where people want to live and work sustainably and visit because of its strong identity and sense of place, high amenity value and quality of life. A sustainable, low carbon town, which continues to be the regional leader for economic development and employment, maximising its strategic location, accessibility and gateway status.'

The plan seeks to deliver a vibrant and viable town centre for Shannon, with a range of retail and service facilities that will attract an increased number of visitors to the town and increase retail floor space to ensure that the retail needs of Shannon's local resident community are met within Shannon town centre in so far as possible.

A mixed-use approach to all proposals will be encouraged throughout the town centre with emphasis placed on increasing the quantity and quality of retail offer, the development of a night-time economy and developing cultural and entertainment facilities for the community. Considerable emphasis will be placed on extending the retail offer (both convenience and comparison), providing additional facilities and services to encourage great social use of the town centre, improving the public realm and overall 'town centre feel', and the use of best practice in sustainable development and energy conservation.

It notes the town centre would benefit from a comprehensive review of vehicular and pedestrian circulation including a review of the hierarchy of access points which have a bearing on footfall and which impact on retail opportunities throughout the centre.

Retail Objectives

The town provides a range of local services meeting the day-to-day needs of its resident and catchment populations. The traditional provision along Main Street/Church Street is supplemented by another supermarket premises in the northern part of the settlement as well as a shop associated with a petrol filling station.

In accordance with the provisions of the Mid-West Regional Retail Strategy 2010-2016, the following is the objective for retail development in small towns such as Newmarket-on-Fergus:

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

Commercial/Mixed Use

MU1 Within and Adjacent to the Town Centre

- This site has been identified as having potential to facilitate the expansion of the existing town centre area and to establish a pedestrian link with the town park to the south. Any development of this site must have regard to the special historic or architectural conservation value of the surrounding area, with development to be carried out in a sympathetic manner.

2.3.1.4 Killaloe Municipal District Plan (Volume 3c of the Clare County Development Plan 2017-2023 (as varied))

Scariff/Tuamagranry

Scariff/Tuamagranry is located within the Killaloe Municipal District and lies within tier 2 level 2 of the retail hierarchy. Both settlements have expanded in recent years they are recognised as one of the main service centres within east Clare. The plan sets out numerous objectives which seek this settlement to become a growth centre and enhance its service offering in order fulfil its role as a service town.

Scariff provides the day to day needs of its local population. However, the settlement has a lack of comparison services which creates a major leakage into other settlements. Key retail policies seek,

- To support the town as an important centre for the provision of convenience goods and retail services;
- To encourage the provision (where not already provided) of good quality convenience outlets capable of supporting a main food shopping trip in the town centre;
- To support the provision of non-bulky and bulky comparison goods outlets in the town centre where these are aimed at meeting the needs of the local catchment populations.

Killaloe

The town of Killaloe acts as a service centre in east Clare. The town's local population catchment extends into north Tipperary. The town provides benefits from tourist attractions which allow the town to support a wider range of comparison goods than

would be justified by its local catchment population. The plan includes multiple retail policies for Killaloe, namely,

- To support the town as an important centre for the provision of convenience goods and retail services;
- To encourage the provision (where not already provided) of good quality convenience outlets capable of supporting a main food shopping trip in the town centre;
- To support the provision of non-bulky and bulky comparison goods outlets in the town centre where these are aimed at meeting the needs of the local catchment populations.

Tulla

Tulla is positioned on tier 3 of the retail hierarchy and acts as a significant service centre in the area, offering a range of retail, commercial and community facilities. The plan notes the potential for retail expansion within the town,

- To promote the development of the commercial and retail sector in the town. New development of this type shall be located in the centre of the town and the redevelopment of existing unused or derelict structures for retail and commercial purposes will be particularly encouraged;

2.3.1.5 West Clare Municipal District Plan (Volume 3b of the Clare County Development Plan 2017-2023 (as varied))

Kilrush

The west Clare Municipal District is the largest district in County Clare by land mass. Kilrush is the largest settlement within the west Clare Municipal District and is positioned on tier 2 of the retail hierarchy. The plan foresees Kilrush to become a driver of growth and prosperity which will ensure the town becomes a key location for industry, employment, retail and enterprise. The plan does not envisage that edge-of centre or out-of-centre convenience retail development will be required.

Overall, the town provides a good level of retail provision, nevertheless the plan outlines the potential for enhanced retail activity within the town centre for both local catchment and tourist retail provision,

- Support the improvement of retail facilities in Kilrush town centre so as to improve the service provided to the local catchment population;
- Encourage the provision of tourist and visitor orientated retail provision to capitalise on the inherent potential of these centres.

Ennistymon/Lahinch

Ennistymon/Lahinch is located in north Clare. Ennistymon is the largest town in North Clare and has a particularly strong urban core, however areas are in need of consolidation and renovation. A key objective for this settlement is to facilitate the consolidation and regeneration of the town through appropriate renovation and redevelopment of derelict buildings.

Lahinch and Ennistymon both serve different retailing functions as Ennistymon serves as the main service centre for both Lahinch and the wider north Clare area. Ennistymon provides a wide range of produce and services, whereas Lahinch largely caters for the tourism trade. Key retailing policies for this settlement include,

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

Kilkee

Kilkee is a picturesque seaside village along the Wild Atlantic Way. The plan seeks to deliver a vibrant and viable town centre for Kilkee, with a range of retail, commercial and service facilities that will attract an increased number of visitors to the town and increase retail floor space to ensure that the retail needs of the local catchment population and tourists is met. Kilkee has a good range of small convenience outlets but no large supermarkets are present within the village. The comparison-goods shopping function is very limited. The key retail policy for the village seeks,

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

2.3.1.6 Shannon Town and Environs Local Area Plan 2012 - 2018 (Extended to 2022) as amended

Retail is addressed at section 5 of the Shannon Town and Environs LAP. It notes the existing town centre contains a number of mixed businesses and retail. Shannon Town Centre provides the primary retail floor space within the town. While it serves the local population for convenience shopping, there is little to attract visitors to the town in respect of comparison goods. It notes plans for the redevelopment and expansion of the existing Shannon Town Centre shopping precinct, including the relocation of Lidl supermarket and a potential new anchor store in the future as well as permissions for significant retail development in the area adjoining An Bothar Mór. It includes the following relevant objectives:

- To consolidate the existing core retail area through the continuing improvement of the quality and range of retail offer, aesthetic improvements, the development of a streetscape onto Bothar Mor, improved access arrangements and by facilitating a growth in retail floor space that enhances the quality of service for the surrounding areas.
- To develop a viable and vibrant town centre area with a distinctive and unique shopping character, achieved through a growth in retail floor space, evening uses, an improved consumer choice and range of services for the inhabitants of the Shannon Town and Environs Plan area, the local workforce and visitors to the region.

- To support and facilitate the sustainable expansion of the town centre to the north of Bothar Mór, ensuring that strong pedestrian linkages are provided to this area.
- In tandem with an improved retail offer, to support and facilitate increased linkages and connectivity between the Shannon Free Zone / Smithstown and the town centre.
- To facilitate the development of an expanded town centre to provide inter alia, a new street plaza, high street retail uses, restaurant /café cluster, outlet centre(s), public open spaces, small office units, cinema / theatre, and a major anchor store facility / outlet or discount centre or retail mall in the northern section of the town centre lands.

The LAP considered that MU1, being prominently located and within easy walking distance of the town centre (see walking time analysis maps in Appendix A.4), may have potential to accommodate bulky goods retail warehousing. Convenience and comparison goods, including non-bulky durable goods, which are more appropriately located in the town centre core retail area, will not be permitted on MU1. In respect of future bulky goods retail warehousing on this site, and in line with the Guidelines for Planning Authorities – Retail Planning (April 2012) floor space developed within MU1 shall not exceed 15,000 square metres. Individual units within MU1 shall not be less than 700 square metres and shall not exceed 6,000 square metres.

2.5 Retail Hierarchy

The Retail Planning Guidelines (2012) identify six broad tiers of retail hierarchical order, including; Metropolitan (the five large cities), Regional, Sub-Regional, District Centres, Small Towns and Rural Areas and Local Shopping. They acknowledge that the hierarchy cannot be considered in an overly prescriptive manner and that there are no clearly defined cut-off points between levels of the hierarchy.

Ennis is the primary retail centre within County Clare and is positioned at the top of the hierarchy in tier 2. Shannon, Kilrush, Ennistymon/Lahinch and Scariff/Tuamgraney reside within tier 3 of the retail hierarchy. Small towns and village centres are situated within tier 4.

The purpose of the retail hierarchy is to indicate the level and form of retailing activity appropriate to the various urban centres of the region to enable the Council's to protect each centre's overall vitality and viability whilst allowing each centre to perform its overall function within the county's settlement hierarchy. The retail hierarchy has been developed with regard to the settlement hierarchy.

The Retail Hierarchy is set out in Table 2.3 below.

Table 2.3: Clare County Retail Hierarchy

Tier	Level	Location	Status
Tier 2 - Major Town Centres	-	Ennis	Key Town/County Town
Tier 3 - Town Centres	Level 1	Shannon	Metropolitan town
	Level 2	Kilrush	Service Town
		Ennistymon/Lahinch	Service Town
		Scariff/Tuamgraney	Service Town
Tier 4 Neighbourhood and village centres	Level 1	Kilalloe	Small Town
		Sixmilebridge	Small Town
		Newmarket-on-fergus	Small Town
		Miltown-Malbay	Small Town
		Kilkee	Small Town
	Level 2	Tulla	Village Centre
		Corofin	Village Centre
		Lisdoonvarna	Village Centre
		Kildysart	Village Centre
		Ballyvaughan	Village Centre
Tier 5 – Local/Corner Shops	-	Smaller villages/crossroads – rural shops (post offices, creameries, public houses, filling stations, etc.)	Local/Corner Shops

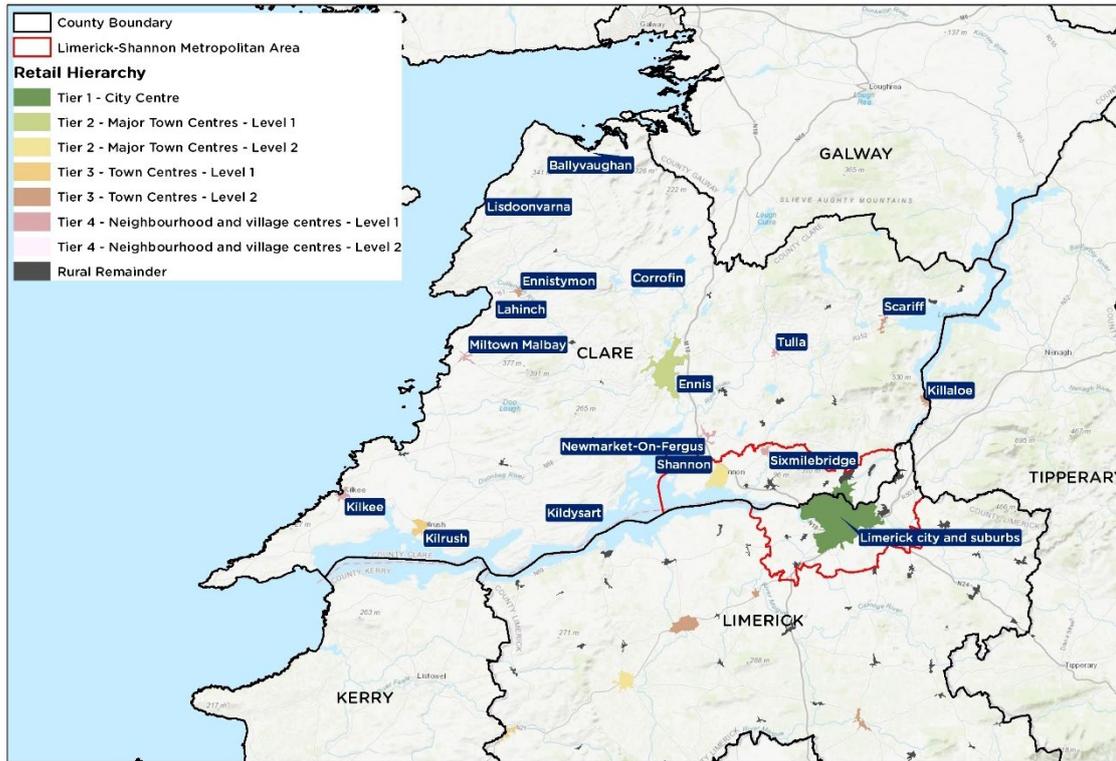


Figure 2-2: Retail Hierarchy

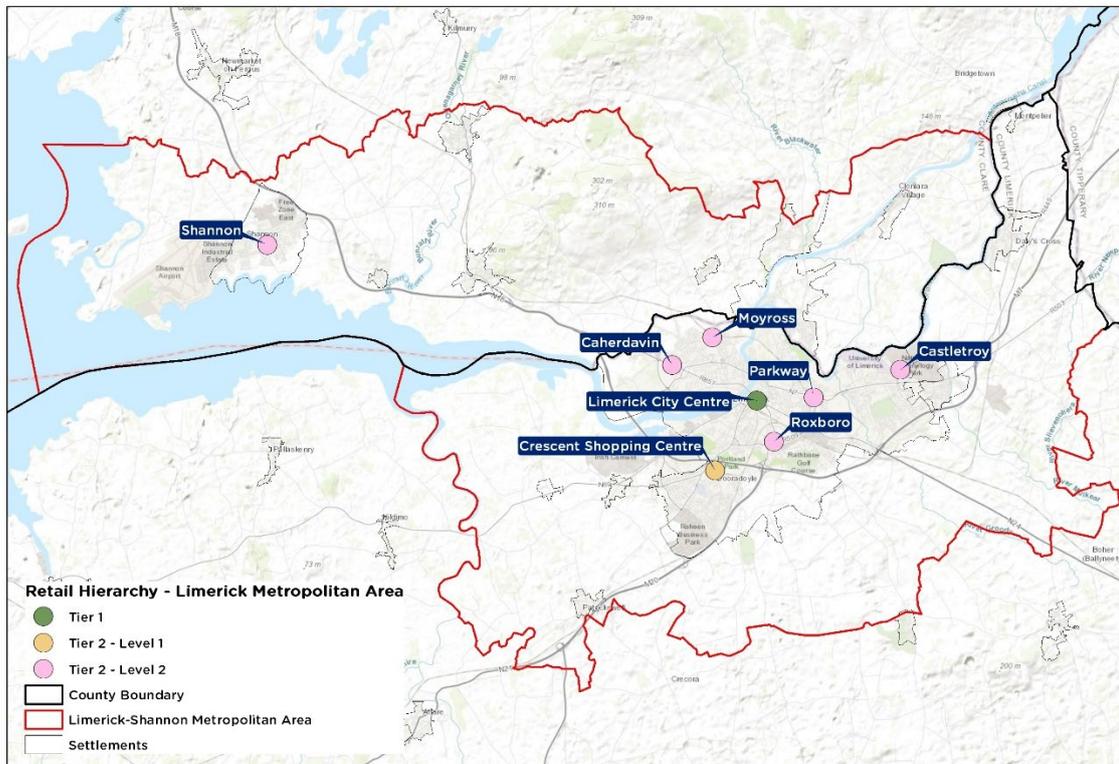


Figure 2-3: Retail Hierarchy of the Metropolitan Area

3 Retail Trends

3.1 Current Retail and Consumer Trends

This chapter provides an overview of the current retail performance and trends, wherein the national context, as well as local conditions, as they relate to the retail sector (comparison, convenience, and bulky goods) are considered for both Counties Limerick and Clare. The overview also provides some analysis of the retail sector in the Mid-Western Region, its performance since the previous strategy in 2010, the factors influencing its performance, and the most up to date retail trends affecting the Counties. Examination of some of the key performance indicators since the previous retail strategy provides a better understanding as to how the Counties' retail sector has changed over the period since the last strategy.

The previous policy document governing retail development across both Counties Clare and Limerick (with the inclusion of North Tipperary) was the Retail Strategy for the Mid-West Region 2010-2016. The period in which this strategy was prepared saw a noteworthy decline not only in the regional, but in the national retail market brought on by the recession and a subsequent national economic downturn. Despite the uncertainty in the market over recent years, the retail industry has continued to grow as one of the primary drivers of the economy in Ireland. Apart from the consistent growth in value of retail sales (excl. motor trade, fuels, and bars) between 2015 and 2020, the overall sector has been a key employer in Ireland, employing 13% of all working people in Ireland as of Q1 2020. The CSO recorded employment in retail services increased steadily year-on-year since 2010 when it accounted for approximately 265,000 employees, which by 2017 increased to approximately 276,000. The increase continued to 306,300 by the end of 2018, and by Q1 2020, the figure was up to 310,200, which is approximately 55,300 more employees than the combined number of employees in construction, agriculture, forestry and fishing².

As the worst effects of the economic recession of 2007 appeared to have subsided for many sectors, the outbreak of the coronavirus (COVID-19) has brought new challenges leaving the global economy facing an uncertain future. Due to the precautionary measures brought on to protect public health and limit the spread of COVID-19, the impact on the Irish economy has seen a massive decline, from one of the fastest growing in the European Union (estimates from the Department of Finance³), to a projected decline of 10.5% in 2020, leading to growing unemployment. The effect of COVID-19 on the Irish economy is clear in the short term, it remains to be seen what the impact will be across Ireland's regions, counties, cities and towns over a prolonged period⁴.

In its latest report, *Consumers and the new reality*⁵ (June 2020), KPMG found that the global challenges in physical shopping brought on by COVID-19 will result in consumers only going to a physical shop "when the price is right, when it is convenient and when it is safe to do so". The study concluded that physical retailers would need to change their approach as results for grocery shopping indicated that 50% of consumer respondents

² CSO, Labour Force Survey 2020

³ gov.ie (www.gov.ie)

⁴ Regional Assemblies: COVID 19 Regional Economic Analysis, May 2020

⁵ KPMG, <https://home.kpmg/ie/en/home/insights/2020/08/whats-next-for-retail-covid-19.html>

felt the change in their shopping habits would be permanent, while 45% indicated the same for non-grocery shopping.

This change in behaviour, although not entirely new as it had already been ongoing before the pandemic, has forced business to consider how they will reopen for trade once able to. Although there will be exceptions, for example in niche retail players and specialised and/or luxury goods, it is expected that the vast majority of retailers would need to have some form of online presence and/or delivery channel if they are likely to survive in the medium to long term. This would mean that retailers would need to move beyond a website only, but develop their capabilities of online payment, radical operational changes to inventory, merchandising and procurement, and of course the critical “last mile logistics”. Due to the competitiveness of the market, the recent development of convenience of online shopping, and the sheer amount of options available, brands and retailers run the risk of losing customers, both in its online and offline incarnations, if they are not able to adjust to the consumer’s behavioural shift toward online shopping.

KPMG’s *Global Retail Trends 2020*⁶ report also highlights other key trends apart from the need of retailers having to adopt business models that consider the importance of online shopping. The report presents findings on what consumers find most important: (1) a brand’s purpose, i.e. its position on a social or political issue, and (2) whether a retailer/brand has availability of what the consumer is looking for.

Given the hardships that consumers had to face during a world pandemic, results from the study indicated that consumers want to see the notion of ‘people above profit’ reflected in the retail businesses they support. Consumers have expected retailers to reflect their values and to care about the same societal issues they do. It is expected that businesses will be showcasing their response to the impacts of COVID-19, and how they intend to assist society, which should result in greater brand or retailer loyalty.

Due to the growing use of online shopping, even prior to the more forced interaction therewith by COVID-19, consumers have become accustomed to having a wide range and variety of projects available at the click of a button. This has diluted customer loyalty. For retailers to survive, and thrive, in this changing environment their offering will either need to be broadened to a considerable selection or narrowed to key high-demand items. It is expected that retailers will hence invest in three key areas:

- Customer loyalty programmes, where retailers would need to improve on the usual points-based system, to incorporate a more integrated rewards system with a selection of service and product reward offerings.
- Customer data, where retailers compile and analyse consumer spend, preference and shopping behaviour to improve value and relevance of offers to particular groups of consumers.
- Technologies that improve the shopping experience, with retailers developing innovative ways of connecting with customers, and making the shopping experience more convenient (e.g. voice ordering through smart speakers).

⁶ KPMG, [Global retail trends 2020 - KPMG Global \(home.kpmg\)](https://home.kpmg.com/globalretailtrends2020)

The *Consumers and the new reality* report further states that customer behaviour will increasingly be influenced by their need for self-protection. The pandemic has caused many people to think about their physical and financial security needs over the short and medium term. The following figure highlights some of the key results.

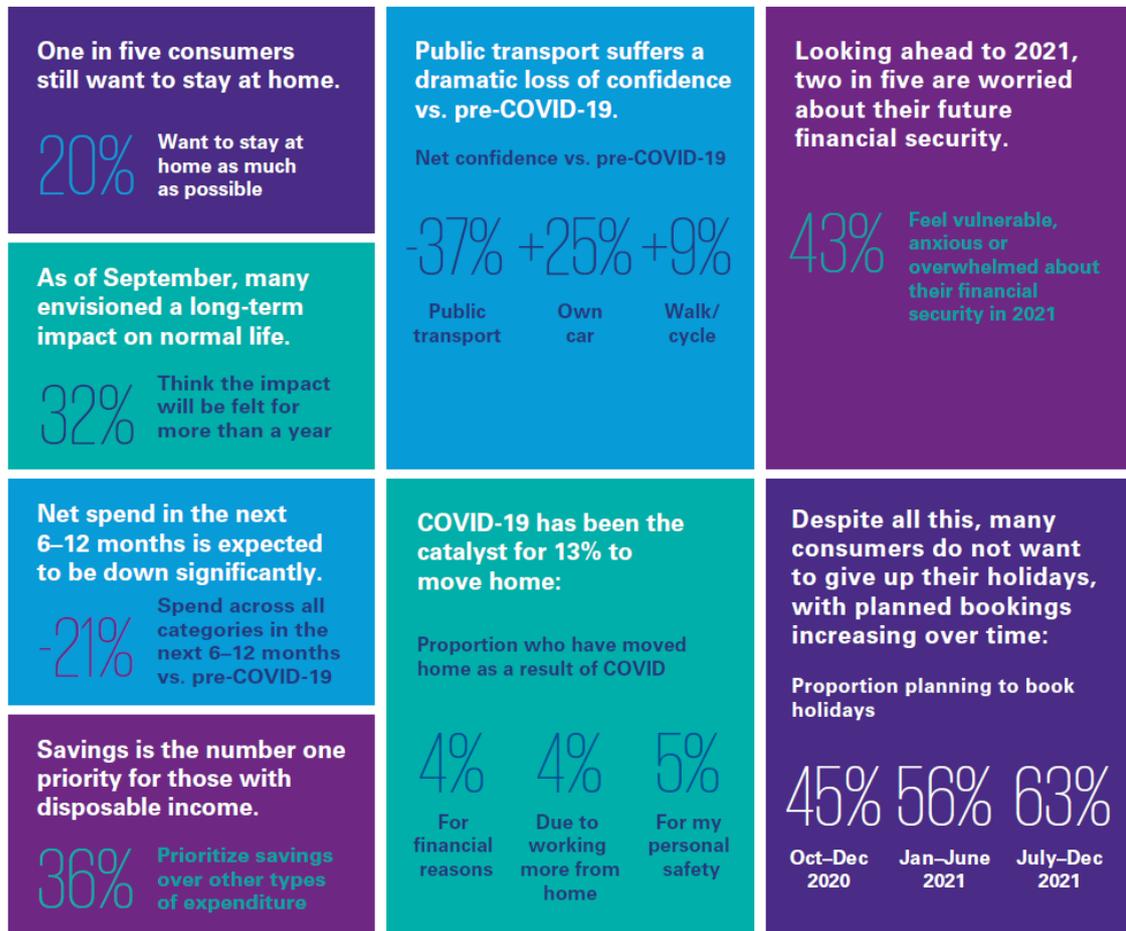


Figure 3-1: Customer Trend Overview (Source: KPMG)

As seen in Figure 3-1, customers expect to see the impact of the pandemic on ‘normal life’ last for more than a year, and has already led to a reduction in spend and a subsequent focus on savings and longer term financial security. The precautionary measures and change in lifestyle brought on by the pandemic has also placed more emphasis on consumers at home, and their apparent demand for access to retail goods and services at home. The home has thus become the new hub, with increased expenditure on improving customer’s experience and perception of working and living at home.

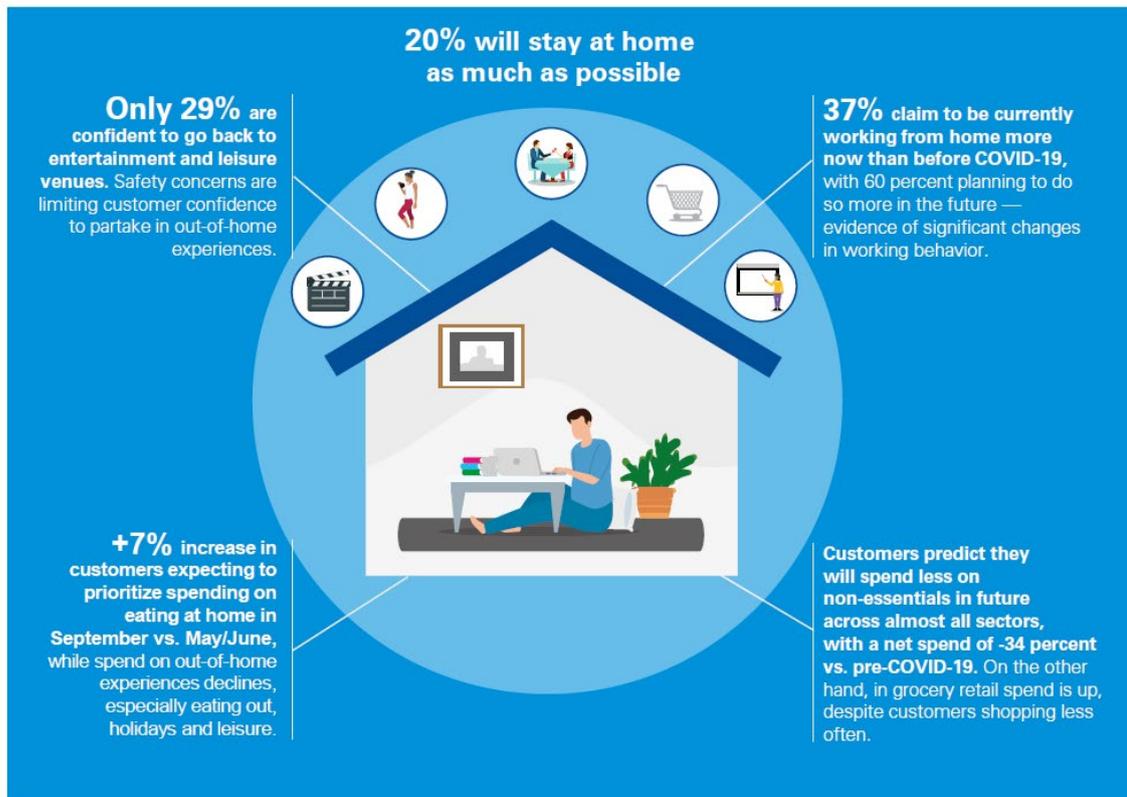


Figure 3-2: Focus on the Home (Source: KPMG)

The increased focus on the home environment has seen particular increases in shopping spend and volume on groceries (increased eating in as opposed to eating out), home and garden improvements, and electrical goods/technology.

When looking at retail in different locations, various reports mention the interplay between town centre and suburban retail, and the changing uses of these locations. In the report *Town centre futures: Evidence and ideas for recovery*⁷, it is mentioned that the health and future of town centres do not solely rely on retail, but rather a mixed-use approach that is tailored to each specific area's local uses and needs. The mix of retail and other services should complement each other to form a connection between where people live, play, work, and shop. The types of uses should however be informed by what the community wants and is driven by their demands for specific goods and services in the certain locations. The success of these initiatives is however dependent on strong partnerships between private and public sectors and stakeholders. Community-owned spaces, which includes retail trading spaces, will increase buy-in into the revitalisation of town centres, empower communities to take ownership of its use and guide the direction of its development.

The *Town centre futures: Evidence and ideas for recovery* report provides a study into town centre dynamics of London as a proxy to the functioning of other town centres. Universal traits identified, some of which are related to COVID-19, include the following:

⁷ Belcher, E. et al. (2021). *Town centre futures: Evidence and ideas for recovery*. Available at: [centre-for-london-town-centre-futures-hq.pdf \(mkmaps.com\)](https://www.mkmaps.com/centre-for-london-town-centre-futures-hq.pdf)

- The effect of store closures imposed by COVID-19 restrictions on the trading of ‘non-essential retail has fast-tracked the move to online shopping, which is set to remain at a higher level than pre-COVID.
- Footfall across high streets and shopping centres have drastically reduced, specifically in larger town centres driven mostly by commercial activity. This is noted by the subsequent footfall increase in smaller neighbourhood and suburban centres as people shop and spend time closer to home. These more ‘local’ centres have become important for social interaction, especially where there is integration of parks or green area facilities nearby.

Similar notions of ‘local’ or suburban centre retail development is even seen further afield in Australia, where most retail, particularly comparison goods retail stores, have suffered huge sales decreases as a result of surging online sales and growth in localism⁸.

3.2 Retail Sales Overview

Before the COVID-19 pandemic, the retail sector in Ireland benefitted from a sustained period of economic growth, with the Retail Sales Index⁹ showing growth of sales in the sector of 32.2% since 2012¹⁰. The CSO has reported an increase in domestic retail sales since 2012, which continued from 2015 to 2019 (see Table 3.1 and Figure 3-3 below). While this is a positive indicator for the sector, it must be tempered by caution as the retail sector is highly sensitive to consumer sentiment, which is increasingly influenced by global economic shifts and geopolitics. As seen in the figure, the onset of COVID-19 early in 2020 caused a sharp downturn in the total sales value and volume indexes for all retail business combined for the State.

Table 3.1: Retail Sales Index 2015 - 2020 Q2

Period	Value of Sales			Volume of Sales		
	Index	% change on previous period	Annual % change	Index	% change on previous period	Annual % change
2015	100.2			100.3		
2016	104.9	5	5	107.8	7.9	7.9
2017	106.5	1.5	1.5	112	3.9	3.9
2018	109.4	2.7	2.7	116.2	3.8	3.8
2019	110.5	1	1	118.6	2.1	2.1
Q1 2020	105.8	-5.7	-2.8	114.1	-5.6	-2.1
Q2 2020	83.6	-21	-24.2	92.5	-18.9	-21.7

⁸ Hoods, Laura (2020, November 1). *The suburbs are the future of post-COVID retail*. The Conversation. [The suburbs are the future of post-COVID retail \(theconversation.com\)](https://theconversation.com/the-suburbs-are-the-future-of-post-covid-retail)

⁹ A monthly measurement of all goods sold by retailers based on a sampling of retail stores of different types and sizes. The retail sales index is often taken as an indicator of consumer confidence.

¹⁰ Savills, Market in Minutes, Quarter 4 2016

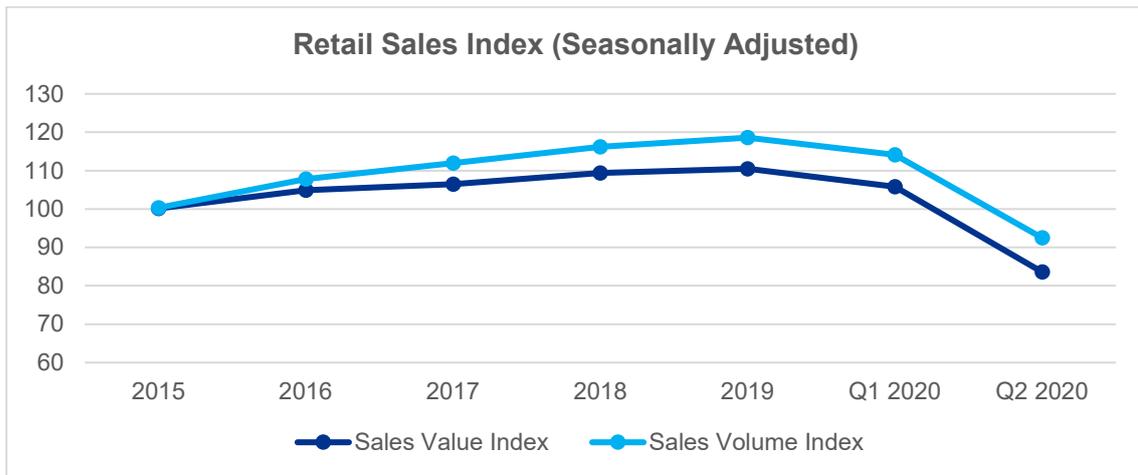


Figure 3-3: Retail Sales Index 2015 - 2020 Q2

The volume and financial value of retail sales is however strongly affected by consumer sentiment. Since the economic recovery following the recession, the recovery of the retail sector has been characterised by the ‘price conscious shopper’. This is again reflected in the consumer trends (as seen in Section 3.1) where it is evident that shoppers are reluctant to spend large amounts, and are very particular on what, and through which channel, they choose to spend. It is also demonstrated by a propagation in discount stores, particularly in the convenience sector, but also in the comparison sector. Together with the increased move to online shopping, this consumer trend has resulted in higher retail competition and a subsequent downward pressure on prices. This means that retailers would not necessarily benefit as much from the increase in volume, as the value sales has decreased.

Although the total value and volume for all business declined from 2019 to 2020, there was an increase in the retail sales value for retail businesses that exclude motor trade, fuel trade, and bars. The following figure provides an indication of this increase.

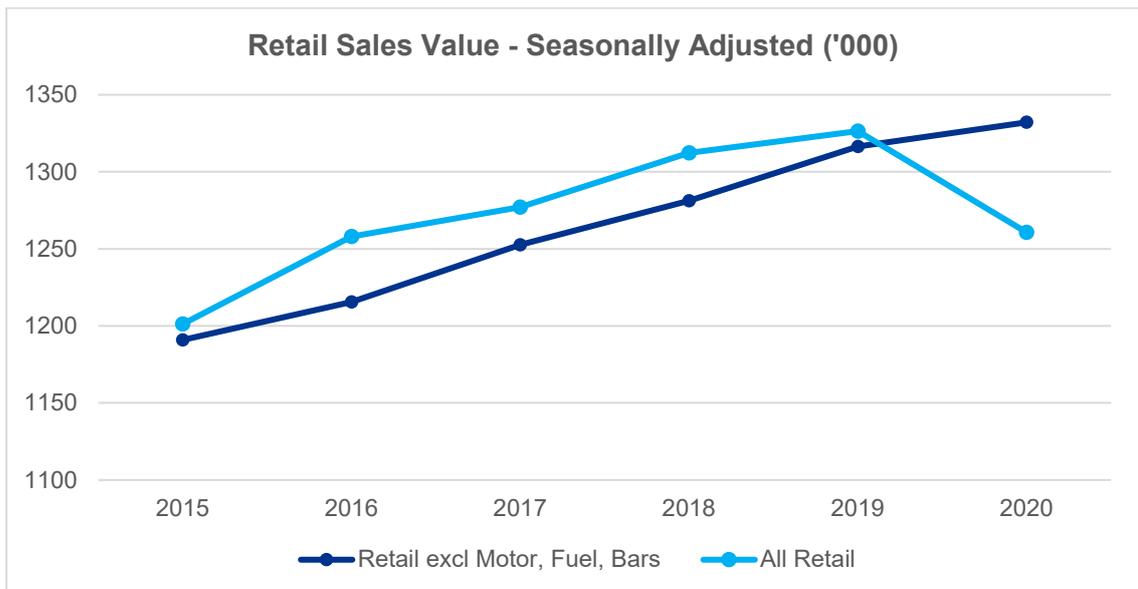


Figure 3-4: Retail Sales Values (2015 - 2020 Q2)

3.2.1 State Retail Sales Volume Overview 2019-2020

The steady growth in sales volumes from 2015 to 2019 indicated a well performing sector, but data for 2019 and 2020 show an increasing fickleness. The following figure and description¹¹ provide an overview of retail sales volumes in Ireland from 2019 to 2020.



Figure 3-5: Percentage Change in Retail Sales Volumes (Feb 2020 - Jan 2021)

2019 Overview

In January 2019, the CSO reported a decrease of 1.2% in retail trade from December 2018, the largest decrease in retail trade since March 2018, with large decreases recorded in the sectors of motor trades (-2.0%) and fuel (-0.6%). The decrease came despite increases recorded for other retail sales (44.9%) and books, newspapers & stationery (4.2%). With motor trades excluded, retail sales went up 0.7%, after a 0.1% fall in the previous month. In February 2019, retail trade increased the first time in three months by 2.1% from February 2019, with a large increase in clothing, footwear and textiles (8.1%) and motor trades (7.6%). Following intermittent decreases in March and May, with increases in April and June, Irish retail fell the most it had in four years in July 2019, showing large declines in motor trades (-13%) and other retail sales (-11.5%). Smaller increases were seen in non-specialised stores (5.7%) and pharmaceuticals, medical & cosmetic articles (4.7%). Retail sales rebound in August (+5.7%) and showed steady growth up to another decline in November 2019 (-3.3%) mainly due to lower sales of pharmaceuticals, medical & cosmetic articles (-9%) and food, beverages and tobacco (-6.5%). Over the December period retail sales saw some resurgence with an increase of 3.9% with the help of a 11.6% increase in food, beverages and tobacco. Year-on-year figures showed an increase of 5.8% on December 2018.

2020 Overview

Following the increase in December 2019, retail sales in 2020 declined for four consecutive months from January to April. The decreases in March was the largest

¹¹ Figure and description sourced from Trading Economics (and CSO)
<https://tradingeconomics.com/ireland/retail-sales>

decrease in 11 years, dropping 12.7% from the month before, as the lockdown on retail due to COVID-19 precautionary measures started taking effect. Large decreases were recorded in bars (-53.1%), clothing, footwear and textiles (-49.2%), motor trades (-30.7%), books, newspapers and stationery (-29.2%) and department stores (-25.8%). In turn, there were large growth spikes in the sale of food, beverage and tobacco in specialised (17%) and non-specialised stores (14%), with further increases in hardware, paint and glass (13.3%) also showing significant increases. The sales downturn was further decreased by 35.4% in April, with further large decreases in the sale of furniture and lighting (-84.1%), bars (-77.1%), clothing, footwear and textiles (-73.6%), motor trades (-71%), and department stores (-69.7%).

After the initial COVID-induced shock, retail sales rebounded strongly from May through to September, with large increases of 32.5% and 38.4% in May and June respectively. The aforementioned categories were also the largest gainers in this five-month period, as reflected in the 296.8% increase furniture and lighting and 284.2% increase in clothing, footwear and textiles sales recorded for the phase two lockdown restriction relaxation in June. When lockdown restrictions tightened once more, retail sales dropped 12.8% in November, with sales in bars (-63.9%) and clothing and footwear (-50.9%) hit once more.

3.2.2 High Streets Task Force

The High Streets Task Force (www.highstreetstaskforce.org.uk) is multi-disciplinary initiative in the UK including inputs from bodies such as the Institute of Place Management and the Royal Town Planning Institute. The web site provides an active resource for addressing challenges to city and town centres.

It is highlighted that both a centre's shopping provision and non-retail offer are key in attracting people into the centre (Wrigley and Lambiri, 2015). Diverse mix of non-retail opportunities in a centre is thus integral to ensuring its vitality and viability (Teller and Schnedlitz, 2012), and a lack of it can lead to customer dissatisfaction (Wrigley and Lambiri, 2015). Although independent retail remains active in many centres, the overall number of stores has been falling consistently for many years. Therefore, it is important to understand what else a centre can offer apart from retail.

The planners' response to COVID-19

Sue Manns, President of the Royal Town Planning Institute wrote¹²:

The pandemic has impacted our High Streets perhaps more than other places. Even as shops begin to open again, there are fewer people, less activity and a growing number of empty premises. Although our High Streets, town and city centres may have been through a dark time, history has shown how they can evolve to meet the needs of the communities they serve. So we need to look at ways that we can breathe new life back into our High Streets and shopping centres, making them once again places that people want to visit; it may be that this requires a different and more diverse role and function. It will be interesting to see how the temporary changes to exempt outdoor markets, pop-up car-boot sales and summer fairs from the planning process and for pubs and

¹² Manns, S. The planners' response to COVID-19. *Urban Des Int* (2021).

restaurants to use car parks and terraces as dining and drinking areas will change these places. Will these changes introduce a new culture and mix of activity creating the spark that is needed to bring people back to these areas? Similarly, will the temporary wider pavements that provide for social distancing and 'pop-up' cycle lanes to encourage sustainable travel become permanent features of the High Street?

The High Streets Task Force set out the following “New and important priorities for 2020”¹³

NON-RETAIL OFFER: Previously, any part of a town’s offer that wasn’t retail was included in DIVERSITY – but as the non-retail offer becomes more important to many high streets then it is becomes as a priority in its own right.

MARKETS: They are our oldest form of collective retailing, however, the transformation of markets into food halls and other ways in which markets are reinventing demonstrates how they are now improving the vitality and viability of many towns.

REDEVELOPMENT PLANS: Unfortunately, some town centre regeneration has been misguided and, after the financial crash, other plans have stalled, leading to situations of planning blight, both of which have a negative impact on town centres and high streets.

FUNCTIONALITY: This refers to the various purposes that towns serve. In some locations certain functions dominate but others have more of a multifunctional economy. Research has demonstrated that understanding these functions is important before visions, strategies and other interventions are planned.

INNOVATION: Successful transformation is not just dependent on traditional investment and development, it can also be kick-started by pop-up shops, festivals, events, and community use of redundant retail space. The message here is that place leaders and partnerships need to be creative and experiment. Refiguring town centres for social distancing is part of this innovation process - with the successful interventions likely to become a more permanent feature.

¹³ [25 'Vital and Viable' Priorities | High Streets Task Force](#)

4 Household Retail Surveys

The following chapter summarises the surveys carried out as part of this strategy. The household phone surveys (consisting of an equal split between landline and mobile phone calls) were carried out between in December 2020 and February 2021. The household phone surveys were supported by an online survey of the same questionnaire which was launched in mid-December 2020 and extended to February 2021. The survey results were collated at catchment level for all areas assessed.

4.1 Methodology

A total of 1,394 surveys were conducted, which consists of 605 household phone surveys and 789 online surveys carried out across County Limerick and County Clare (incl. Limerick-Shannon Metropolitan Area, each retail catchment in County Clare, as well as the extension of the Limerick Catchment into County Clare).

The surveys contained a list of questions relating to where the respondents carry out their main food and grocery shopping, top up shopping, comparison shopping (clothing & footwear) and bulky goods (large household appliances and furniture) shopping. The surveys contained questions regarding the respondents' satisfaction with the location they were shopping in along with the frequency of these types of shopping including online shopping. Respondents were also asked to provide feedback on the influence that restrictions and health and safety precautions related to the COVID-19 pandemic have had on their retail shopping habits.

4.1.1 Household Phone Survey Methodology

The locations and number of household (phone) surveys undertaken were allocated in proportion to the population (as recorded in Census 2016) of the 10 - 15 largest settlements in each catchment area. Phone surveys were carried out by using a database of landline and mobile phone numbers registered within County Clare and County Limerick, as purchased from a third-party provider.

4.1.2 Online Survey Methodology

The online survey was intended to supplement the household phone surveys in order to strengthen response rates for questions and target respondents in the younger age cohorts. Although the questions used in the phone and online surveys were the same, the order of the online survey questionnaire was changed in order to prioritise particular questions and ensure the lowest possible survey time and subsequent highest possible response rates. The online survey questions were implemented using survey monkey and distributed using the Clare County Council and Limerick City and County Council's social media and MapAlerter systems to target responses within the Counties. The survey was accessible from December 2020 to end of February 2021.

4.2 Shopper Survey Results

Shopper surveys are used to collate 'on-street' respondent feedback at certain locations within the retail area being assessed. Due to the government restrictions placed on retail trade and personal movement with the aim of limiting the spread of COVID-19, shopper surveys were not conducted. It was deemed unfeasible as in-person surveying would

breach social distancing and interaction guidelines and would not be representative of regular retail trade as shopping is limited to selected categories and consumer movement has been significantly curtailed.

4.3 Household Survey Results

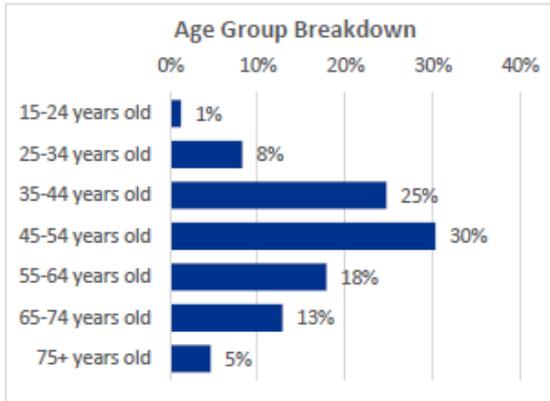
The following subsections provide a summarised overview of the survey results across the Study Areas, including at County and Limerick-Shannon Metropolitan level. To ensure that survey results are analysed correctly each catchment area, a geocoding exercise was performed to assign survey results based on feedback received, to a catchment area within the County. The results were filtered for each catchment, the total of which provides a representative overview of retail and shopper activities in each.

The assignment of catchments for analysis of County and the Metro Area are as follows:

- County Clare
 - Ennis Catchment
 - Ennistymon Catchment
 - Kilrush Catchment
 - Scariff Catchment
 - Limerick Catchment (which includes the Limerick-Shannon Metropolitan Area, as well as the area of the catchment extending into County Clare)

4.3.1 County Clare

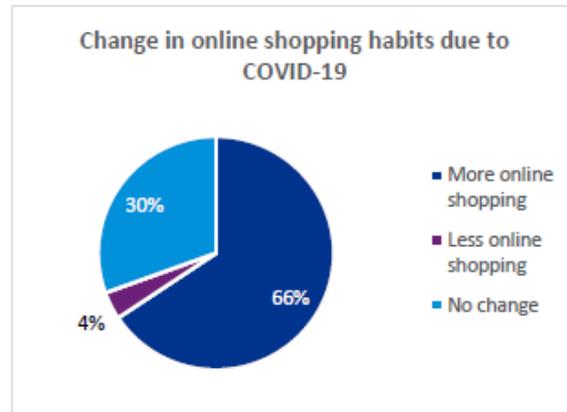
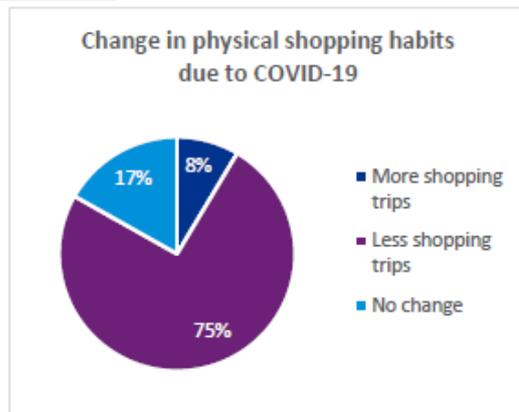
Demography



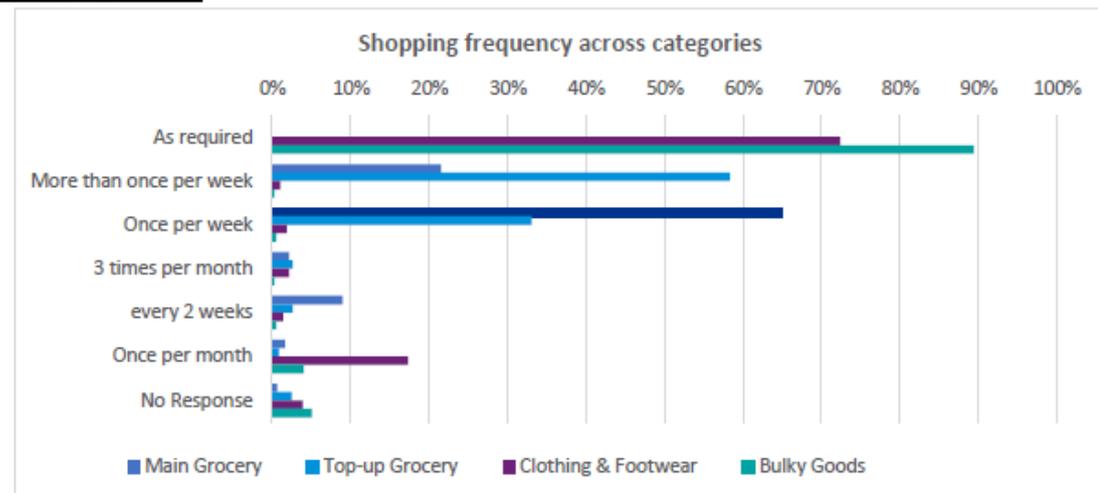
Survey Responses		
Survey Method	#	%
Phone	259	32%
Online	543	68%
County Clare	802	

55% of the survey respondents in County Clare indicated that they are between the ages of 35 and 54. A further 18% of respondents were recorded in the 55-64 age cohort, with 9% of respondents between the ages of 15 and 34. 75% of all respondents have been on less shopping trips with 66% opting for more online shopping. 30% however indicated that they did not change their online shopping habits due to COVID-19.

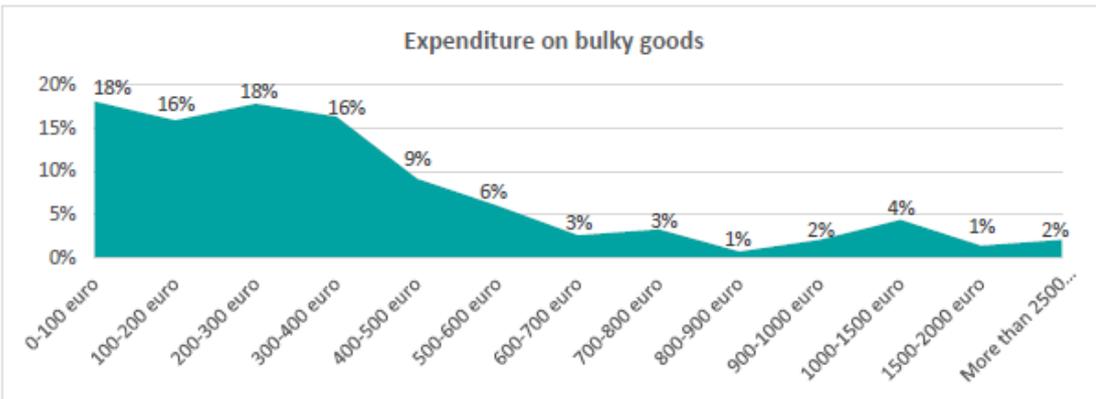
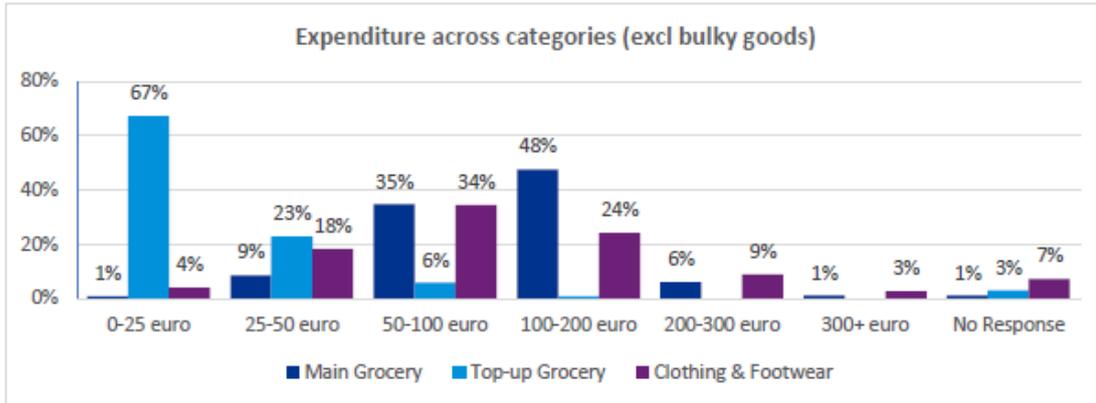
COVID-19



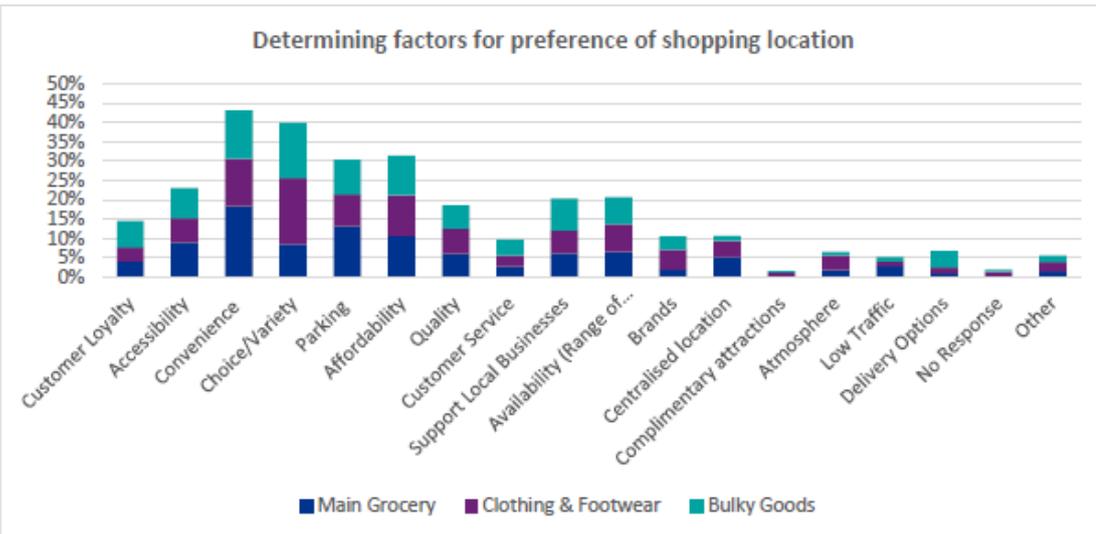
Shopping Habits



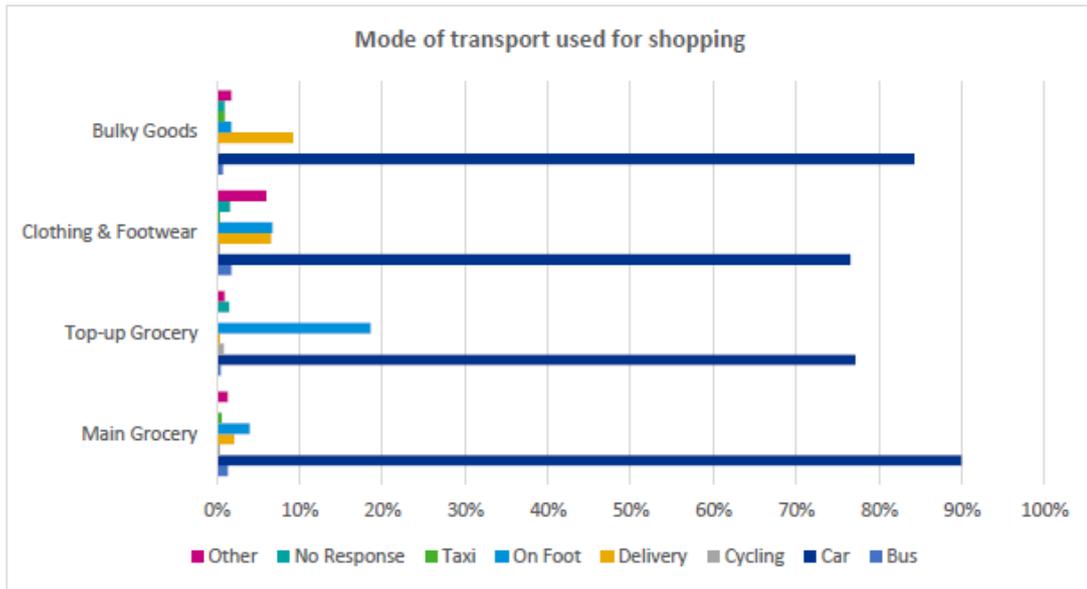
87% of all respondents would do at least a weekly shop for main groceries, with 22% doing so more than once a week. A third of respondents would also do weekly top-up shopping. Shopping for clothing & footwear (72%) and bulky goods (89%) are mostly done as and when required. The majority (67%) of top up shopping expenditure is below €25, with nearly half of main grocery shopping expenditure is between €100 and €200. More than 80% of expenditure on clothing & footwear is disparately spread across €25 to €300. The majority of expenditure (68%) on bulky goods ranges from below €100 to €400.



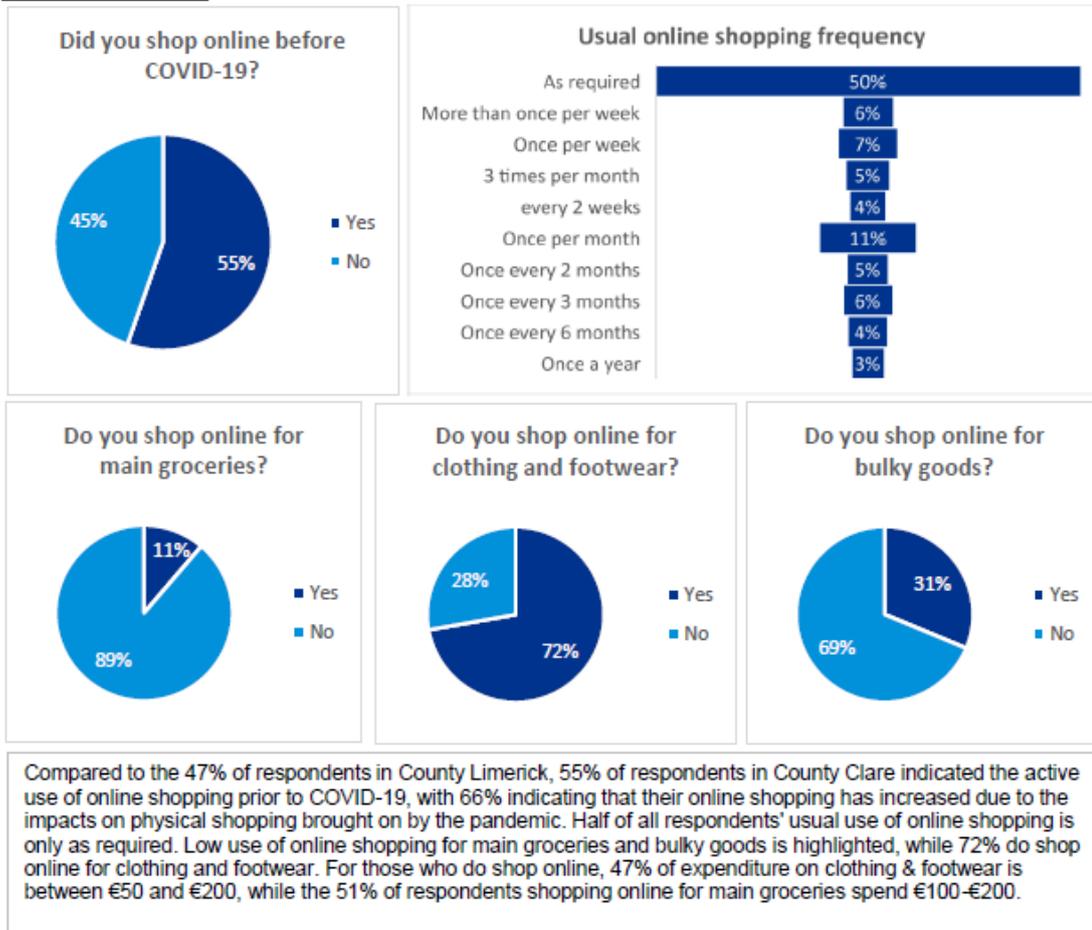
Shopping Location & Transport

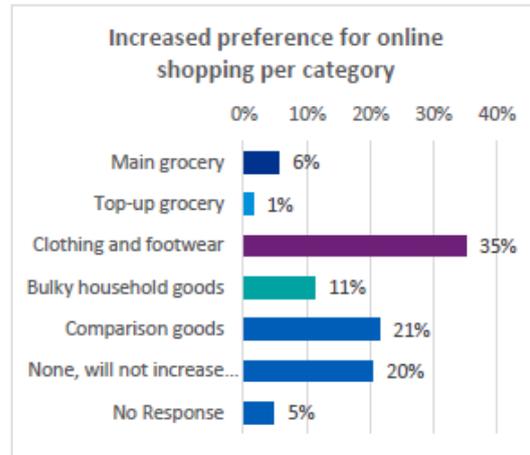
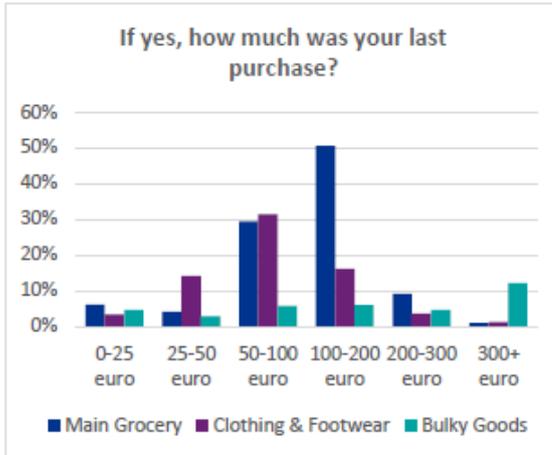


Across the shopping categories, convenience and choice (variety) were highlighted as the main factors that determine where people do most of their shopping. Particularly, convenience (18%) and parking (13%) were marked as important for main grocery shopping, reflecting the frequency and preference of using a car for grocery shopping. In turn, variety (17%) was most important for clothing & footwear shoppers, with affordability equally important to respondents across all categories. Variety, affordability and the support of local businesses were important factors in where respondents chose to do bulky goods shopping. In general, respondents indicated their preference for the use of car travel for shopping, which also shows a general perception of dependency on the car to enable fulfilment of retail consumer activities.



Online Shopping



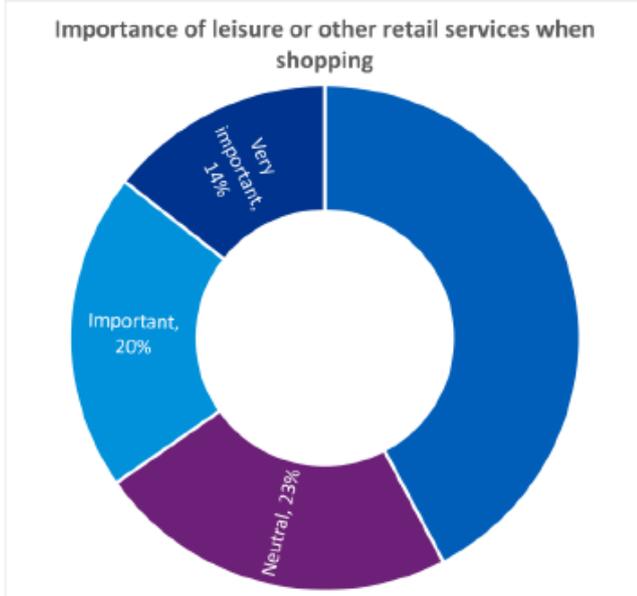


Despite the 20% of respondents considering no change or increase in their online shopping habits, 56% intend to shop more online for comparison goods (including 35% more for clothing & footwear), and 11% more on bulky goods.

Apart from the convenience (including delivery options), variety and availability provided by online shopping were highlighted by respondents as aspects that would motivate increased online shopping in future.

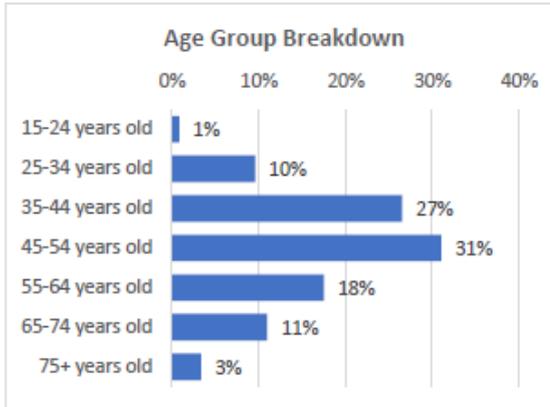
Generally, respondents still prefer physical shopping for main and top-up groceries.

The majority of survey respondents indicated that the availability of leisure or other retail services when shopping has no importance (42%), or are indifferent to it (23%), while only 20% thought it was important.



4.3.2 Ennis Catchment

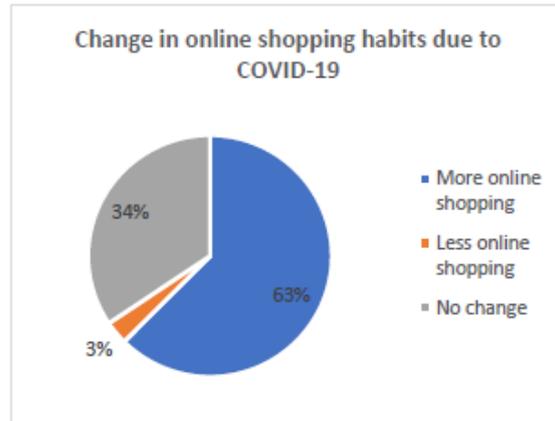
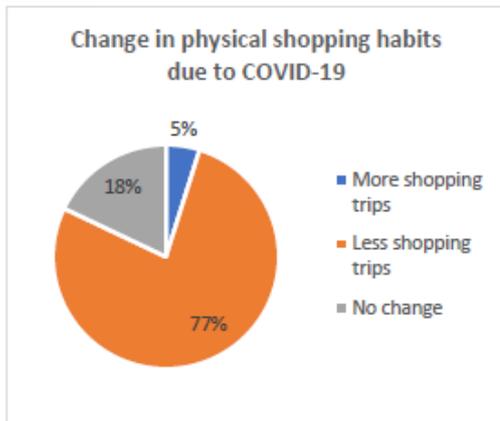
Demography



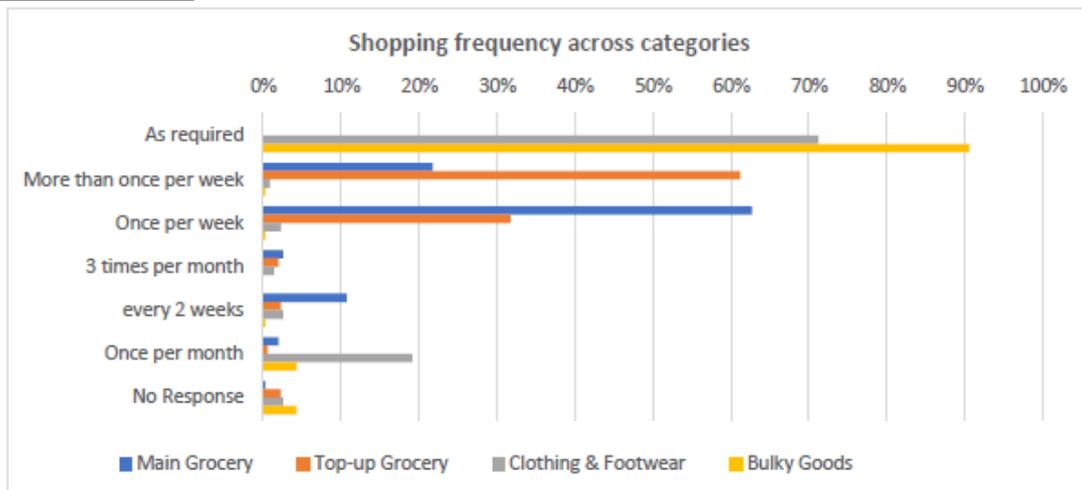
Survey Method	#	%
Phone	107	30%
Online	248	70%
Total	355	
County Clare	802	

57% of respondents from Ennis recorded their age between 35 and 54 years, with an additional 18% in the 55-64 age cohort. 77% of all respondents admitted to doing less shopping trips due to COVID-19, with a 63% increase in online shopping as an alternative. 34% of respondents however indicated that the onset of COVID-19 had not changed their online shopping habits.

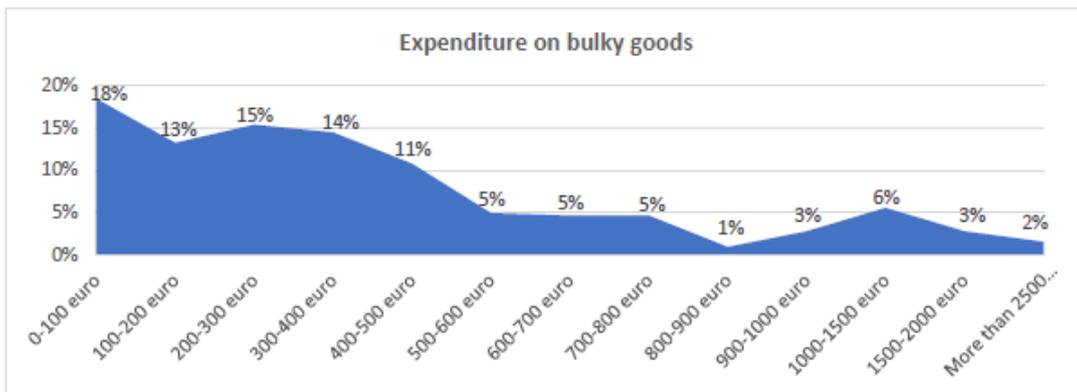
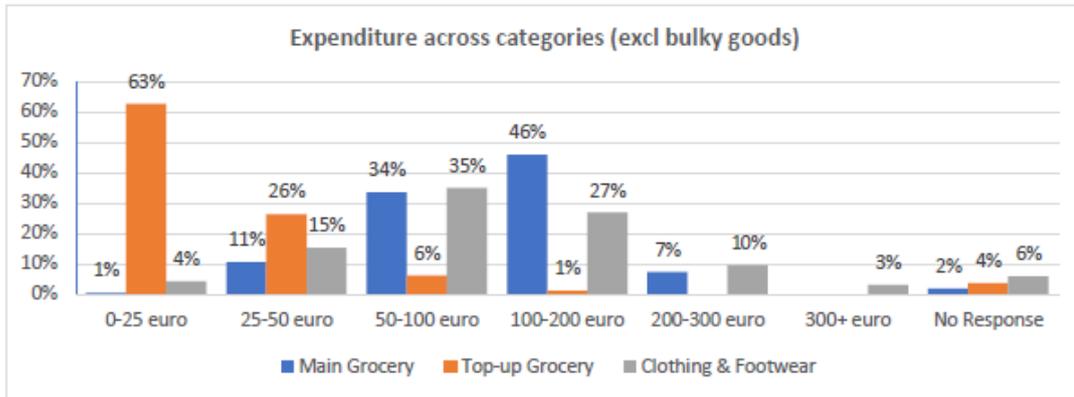
COVID-19



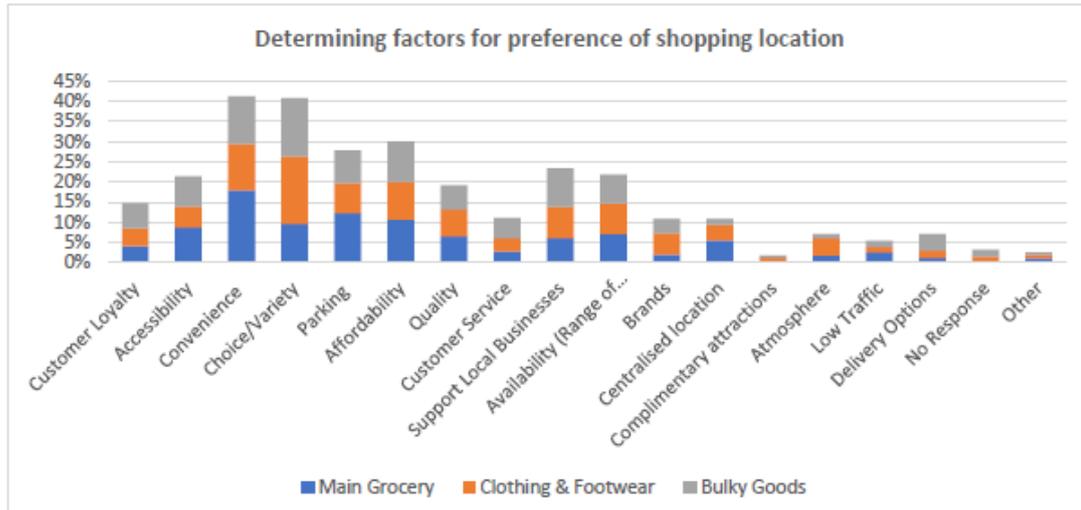
Shopping Habits



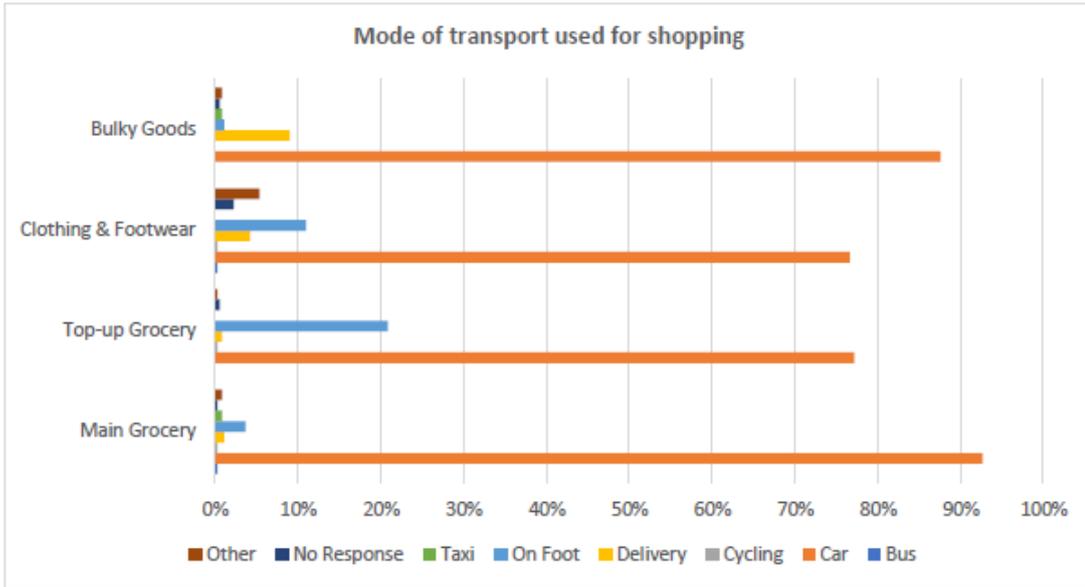
Shopping for clothing, footwear, and bulky goods are mostly done as and when required, with 19% of respondents indicating a monthly shop for clothing & footwear. 85% of shopping for main groceries is done at least weekly, with 61% of respondents doing an additional top-up shop more than once a week. 63% of top-up shopping does not exceed a value of €25, with 34% of respondents spending €50-€100 and 46% spending €100-€200 on main groceries. Similarly, majority of expenditure on clothing & footwear was also between €50 and €200. In turn, 60% of expenditure on bulky goods ranged between less than €100 to €400.



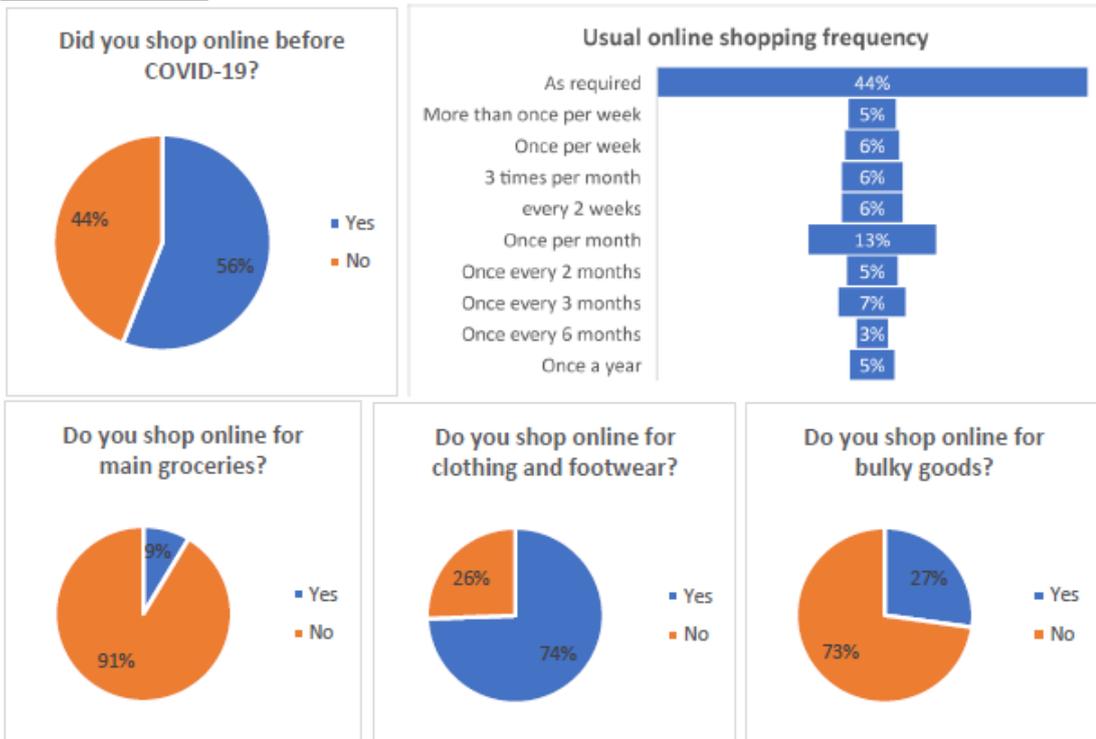
Shopping Location & Transport



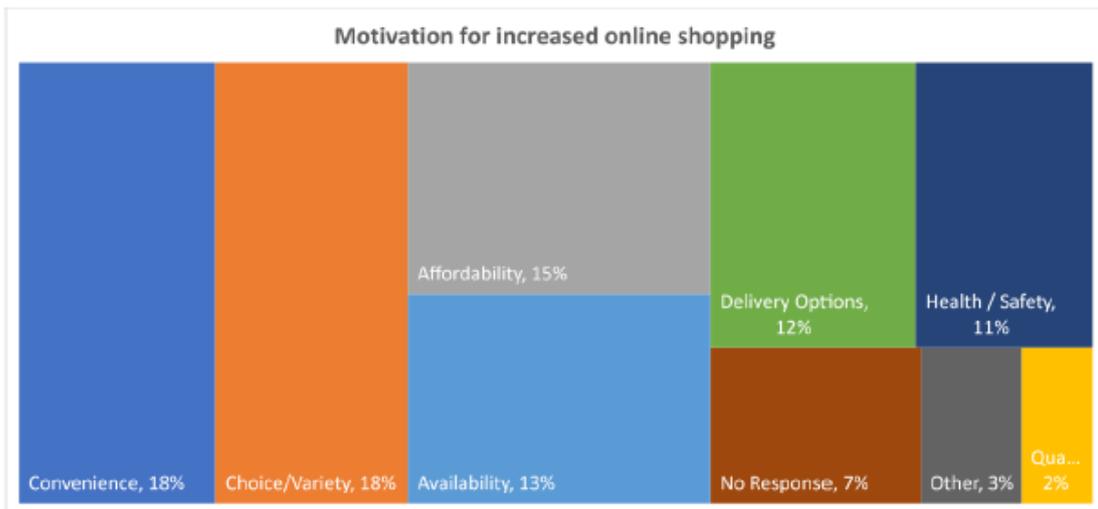
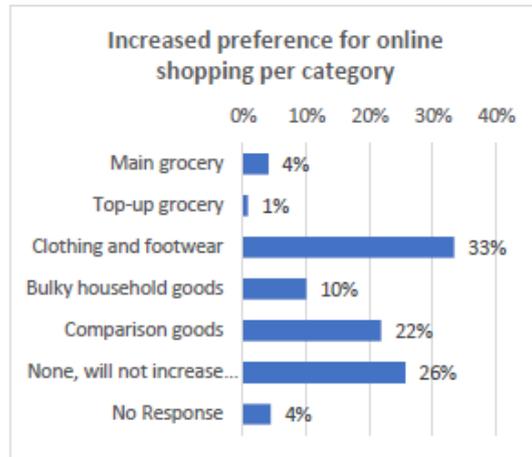
Choice (variety) and convenience were both recorded in equal measure as important factors in the preference of shopping location, with each receiving just over 40% of respondents' votes. Convenience was listed by 28% of respondents as an important factor in deciding where to do main grocery shopping, while variety was highlighted for clothing & footwear and bulky goods. Connected to convenience, parking facilities are considered important at 27% of all respondent votes, although affordability is slightly more important, as indicated by 30% of respondents. Car travel was listed as the main mode of transport for all types of shopping for respondents in Ennis, despite the 21% of respondents who would walk when doing top-up grocery shopping. Delivery options were mostly considered for bulky goods shopping, although still low at 9%.



Online Shopping



56% of respondents in Ennis admitted to actively using online shopping before the onset of COVID-19, although 63% of respondents indicated increased online due to the pandemic. Reflecting the low use of online shopping for main groceries and bulky goods, 44% respondents indicated that online shopping is only used as/when required. 11% did however indicate that online shopping is used at least weekly (or more), which is in line with the 9% of respondents using this method for main grocery shopping. While most respondents still would not prefer online shopping for groceries or bulky goods, 74% do shop online for clothing & footwear. For those shopping online, expenditure on clothing & footwear is mainly from €50-€100, while expenditure on groceries is relatively higher shopping online compared to shopping at location, with 56% of respondents spending €100-€200.

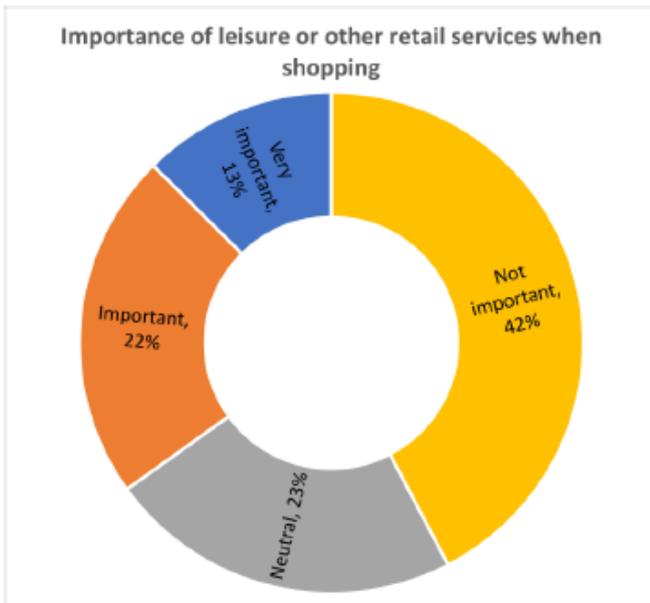


Despite the 26% of respondents considering no change or increase in their online shopping habits, 55% intend to shop more online for comparison goods (including 33% more for clothing & footwear), and 10% more on bulky goods.

Apart from the convenience, variety and affordability provided by online shopping were highlighted by respondents as aspects that would motivate increased online shopping in future.

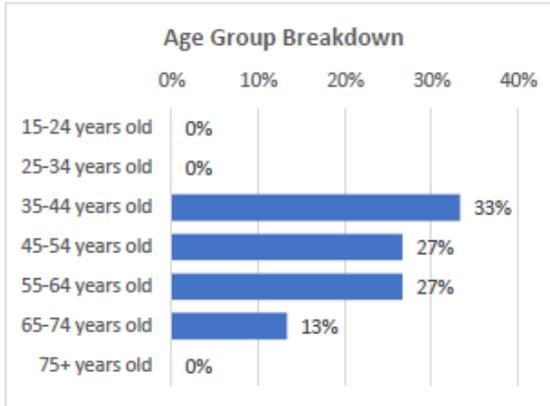
Generally, respondents still prefer physical shopping for main and top-up groceries.

The majority of survey respondents indicated that the availability of leisure or other retail services when shopping has no importance (42%), or are indifferent to it (23%), while only 22% thought it was important.



4.3.3 Ennistymon Catchment

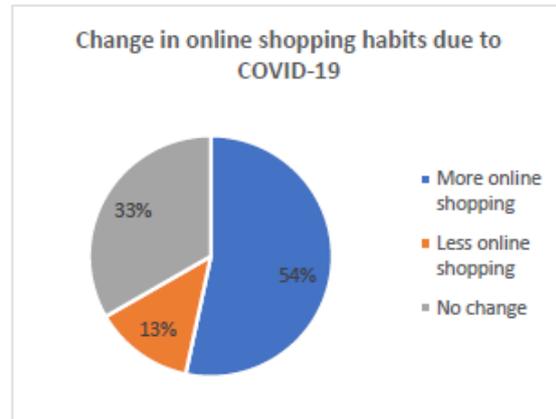
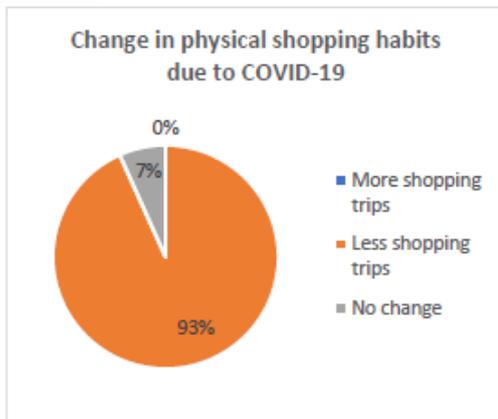
Demography



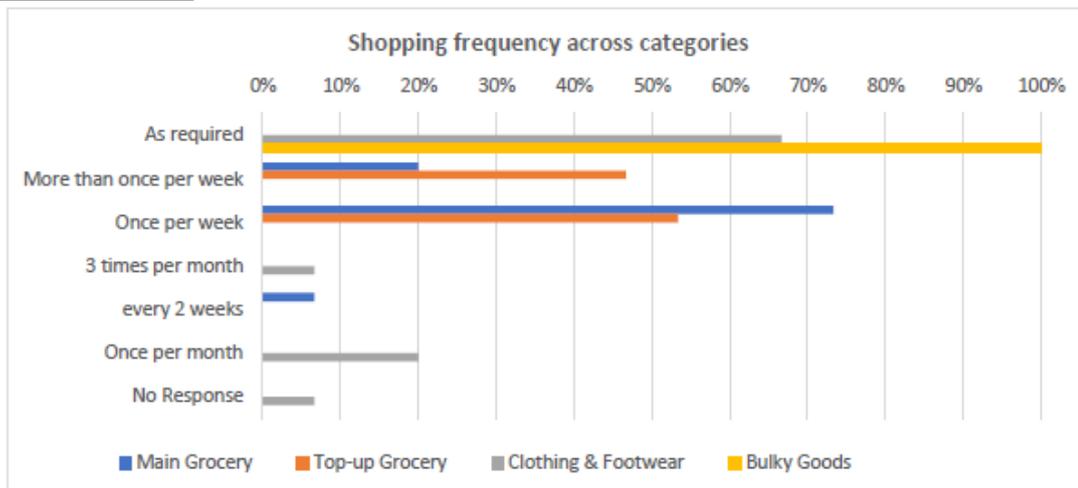
Survey Method	#	%
Phone	3	20%
Online	12	80%
Total	15	
County Clare	802	

60% of the survey respondents in Ennistymon indicated that they are between the ages of 35 and 54. A further 27% of respondents were recorded in the 55-64 age cohort, with no respondents between the ages of 15 and 34. 93% of all respondents have been on less shopping trips with 54% opting for more online shopping. 33% however indicated that they did not change their online shopping habits due to COVID-19.

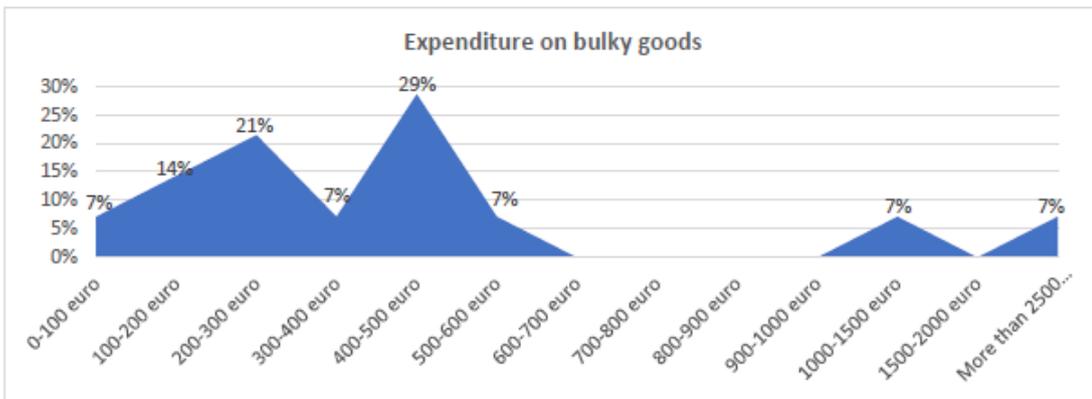
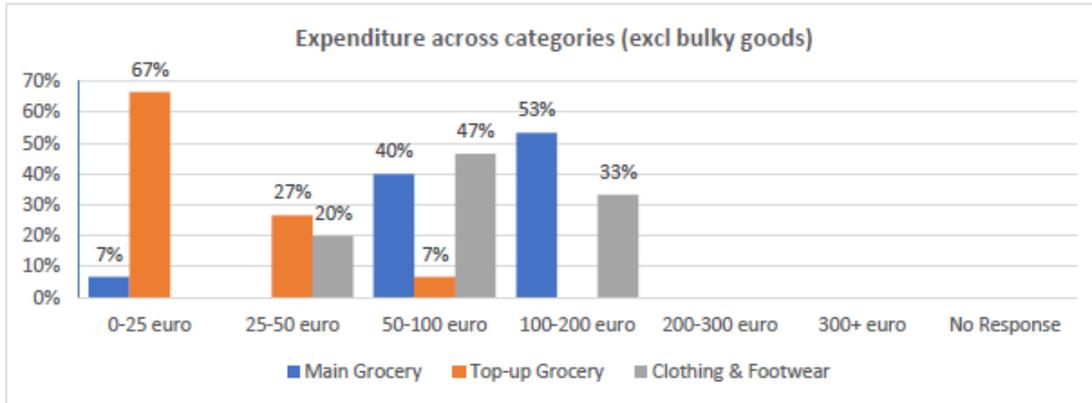
COVID-19



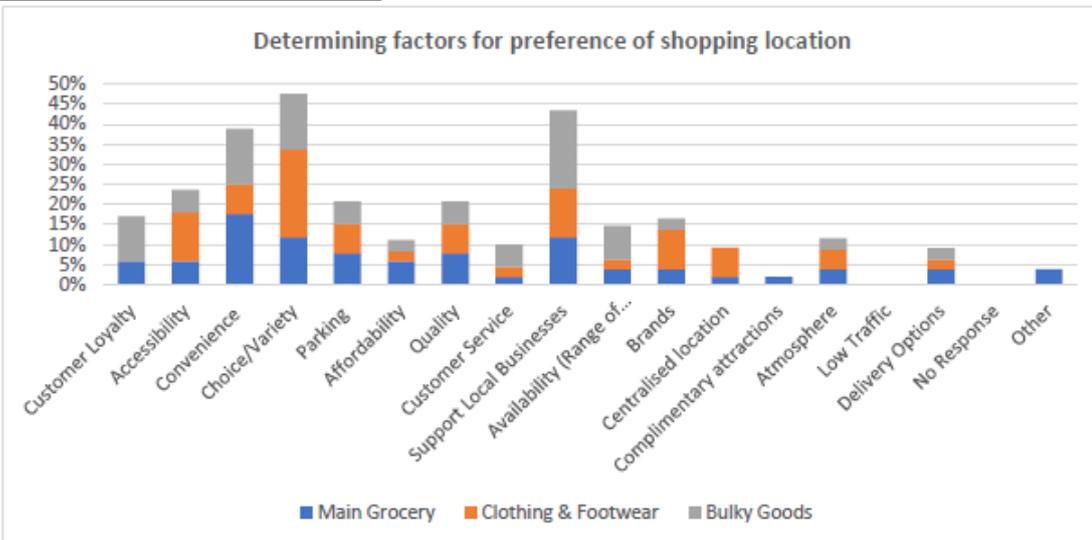
Shopping Habits



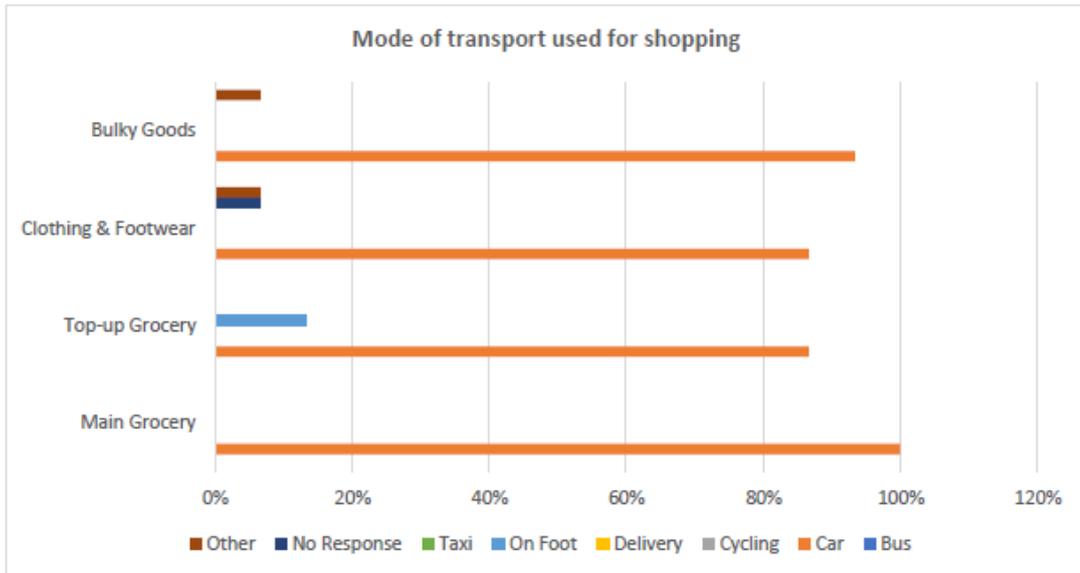
73% of all respondents would do a weekly shop for main groceries, with an additional 20% doing so more than once a week. Shopping for clothing & footwear (67%) and bulky goods (100%) are mostly done as and when required. 47% of respondents would do top-up shopping more than once a week, with the majority (67%) of top up shopping expenditure below €25. 93% of main grocery shopping expenditure is between €50 and €200, with 53% of this in the €100-€200 bracket. The majority of expenditure on bulky goods ranges from €200 to €500.



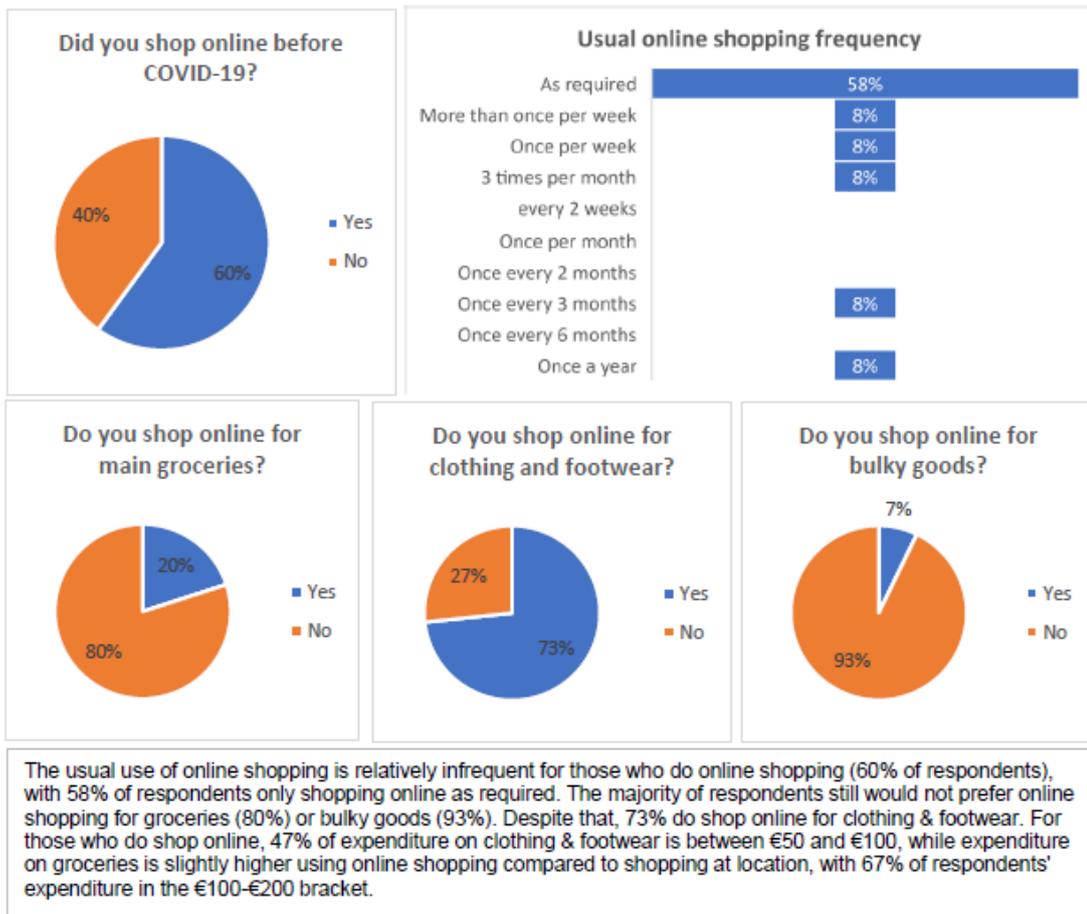
Shopping Location & Transport



Choice (variety) and the support of local businesses were marked as the most important determining factors for preference of a shopping location across all three shopping categories. 22% of respondents indicated that variety drives shopping location preference for clothing & footwear shopping, while local support (19%), variety, and convenience (both 12%) were recorded as important factors for choice of bulky goods shopping location. Parking and quality were rated equally important across categories, while convenience was an important factor for 18% of respondents when grocery shopping. Car travel was listed as the main mode of transport for all types of shopping, although 13% of respondents would walk to do top-up shopping.



Online Shopping





For those opting to shop online and increase the use thereof, the convenience (25%), delivery options (19%), and health and safety (16%) aspects thereof are regarded the main motivators. As seen in overall results, the respondents' intent for online shopping of clothing & footwear is set to increase with 33%, compared to 29% of respondents whose tendency for online shopping is not expected to change.

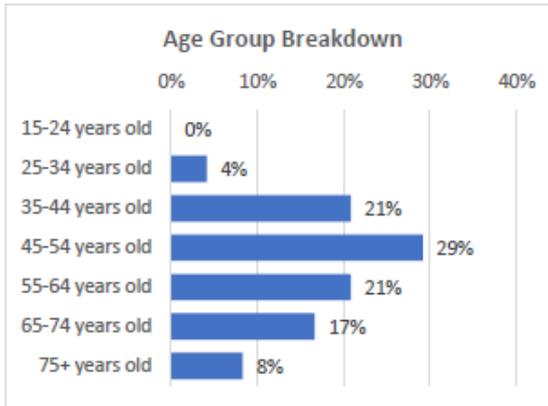
Generally, respondents still prefer physical shopping for groceries, although 14% of respondents are considering to increase their online shopping for these items.

40% of survey respondents indicated that the availability of leisure or other retail services when shopping has no importance to them, while 27% do attach a level of importance to it.



4.3.4 Kilrush Catchment

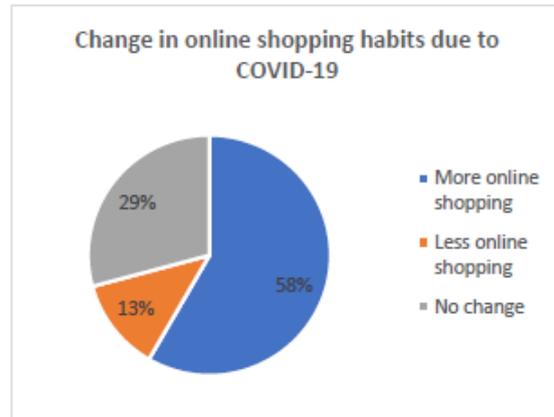
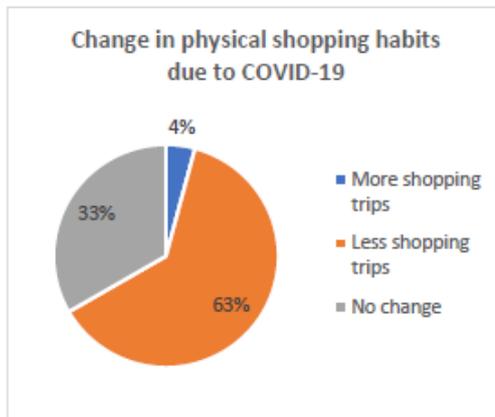
Demography



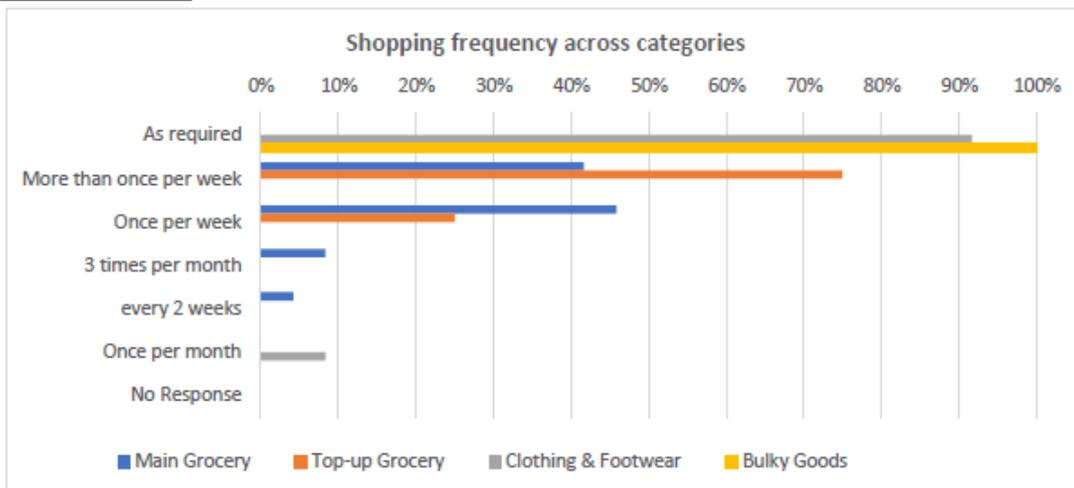
Survey Method	#	%
Phone	8	33%
Online	16	67%
Total	24	
County Clare	802	

Of the 24 survey respondents from Kilrush, 71% were between the ages of 35 and 64, with the largest group of respondents aged 45-54 (29%). 63% of all respondents have been on less shopping trips (better planned trips, larger basket sizes), with 58% opting for more online shopping. 33% however indicated that they did not change their physical shopping habits due to COVID-19.

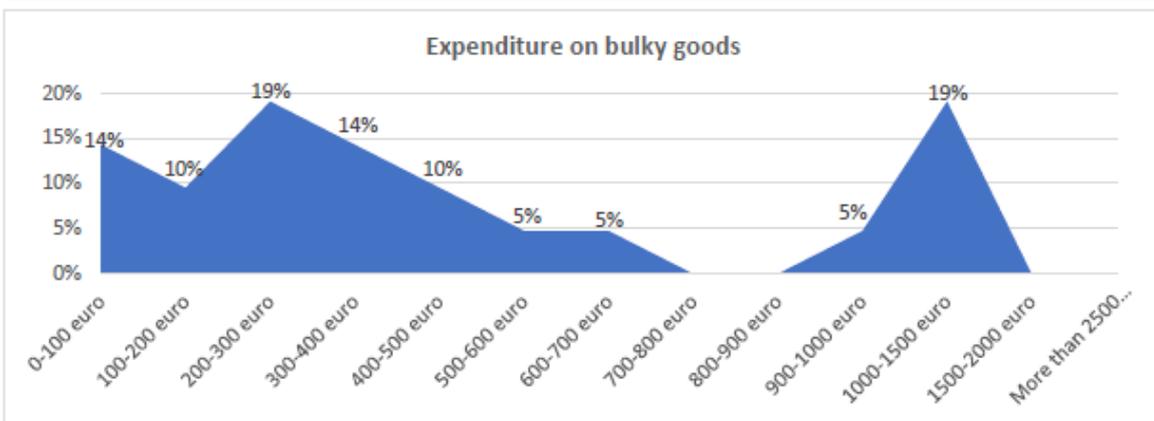
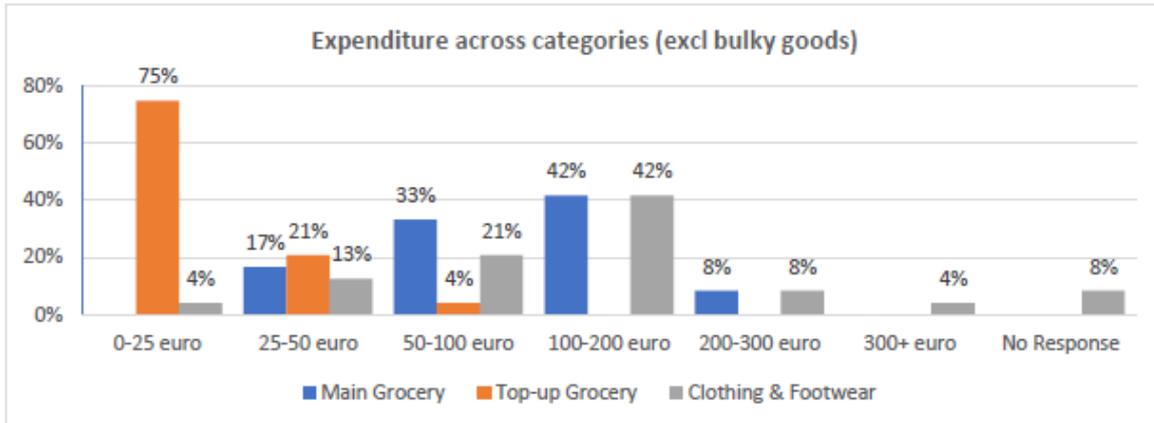
COVID-19



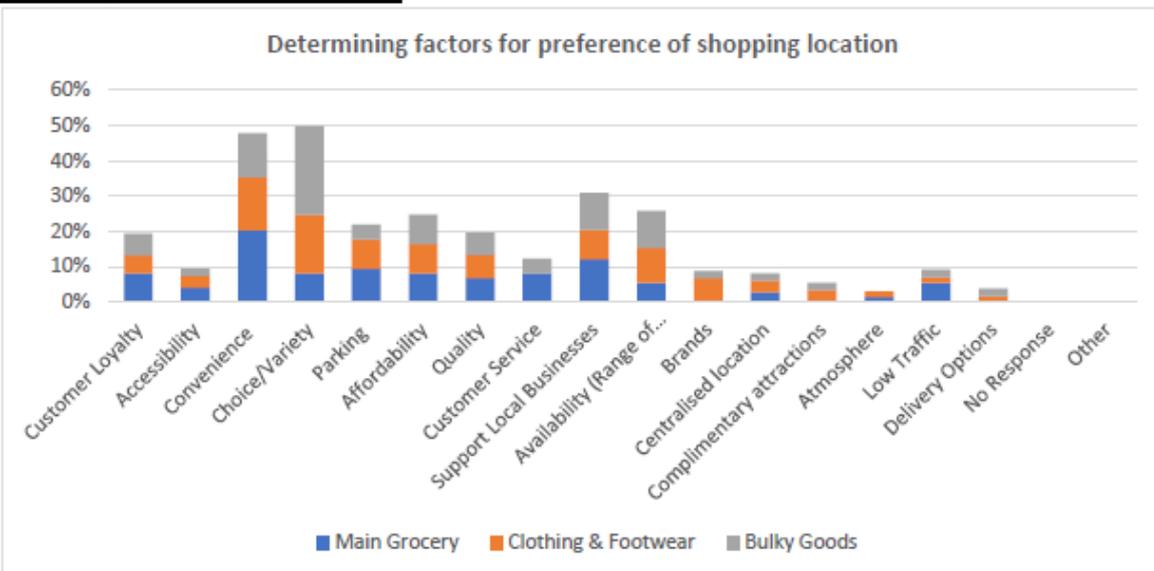
Shopping Habits



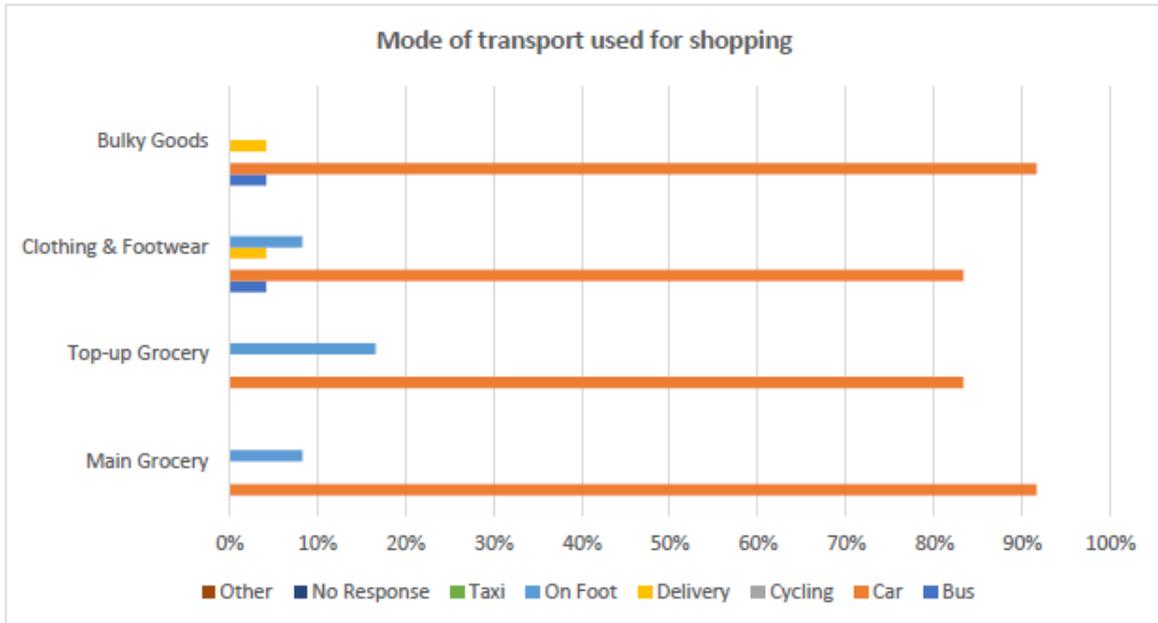
Shopping for clothing, footwear, and bulky goods are mostly done as and when required. Respondents do most of shopping for their main groceries either weekly (46%) or more than once weekly (42%), with 75% of respondents doing an additional top-up shop more than once a week. The majority of top-up shopping does not exceed a value of €25, with 33% of respondents spending €50-€100 and 42% spending €100-€200 on main groceries. Similarly, the majority of expenditure on clothing & footwear was also between €100 and €200. In turn, 19% of respondents reported expenditure on bulky goods between €200-€300 to €1,000-€1,500.



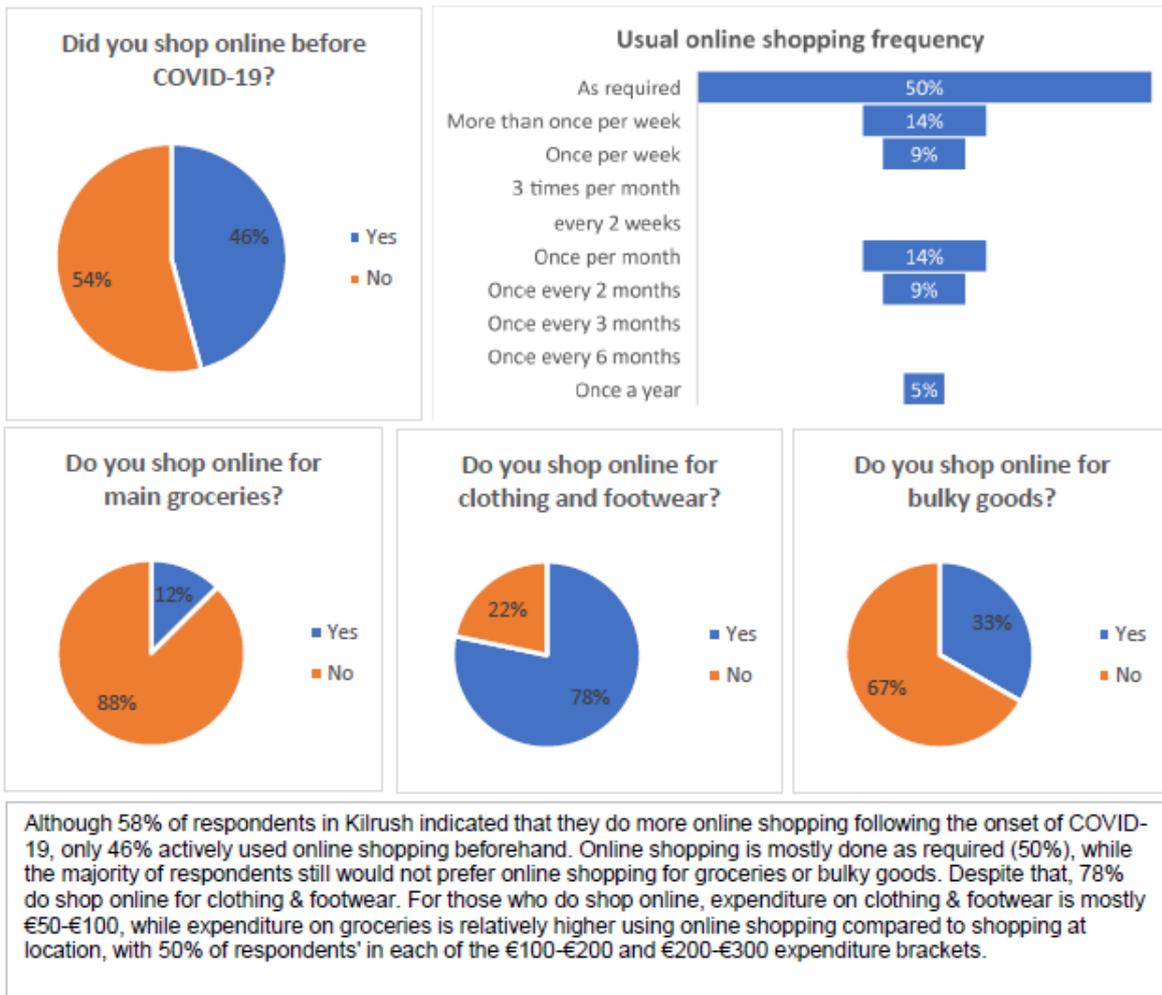
Shopping Location & Transport

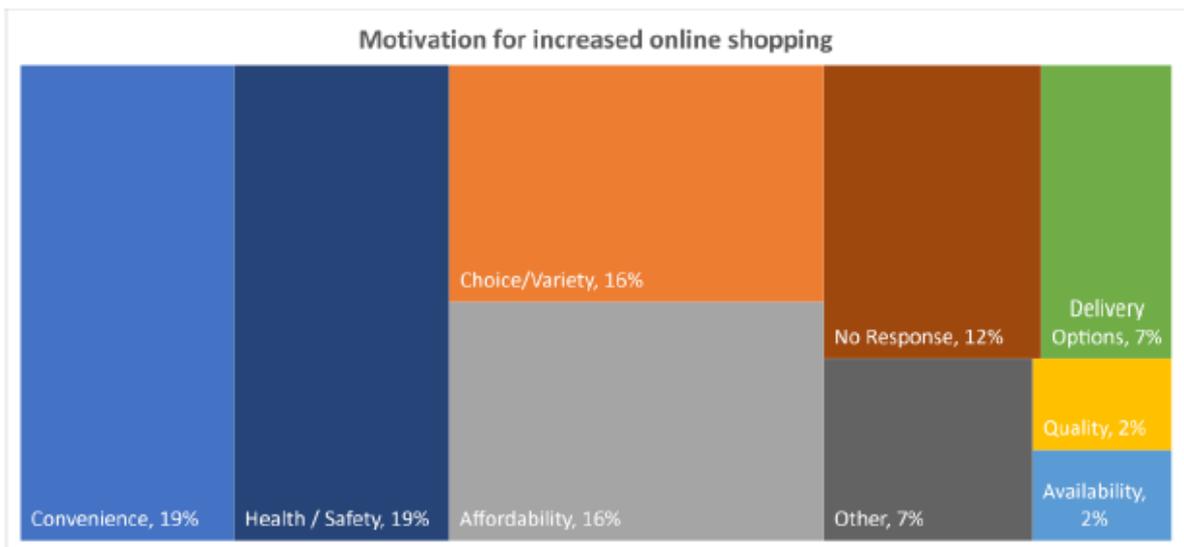
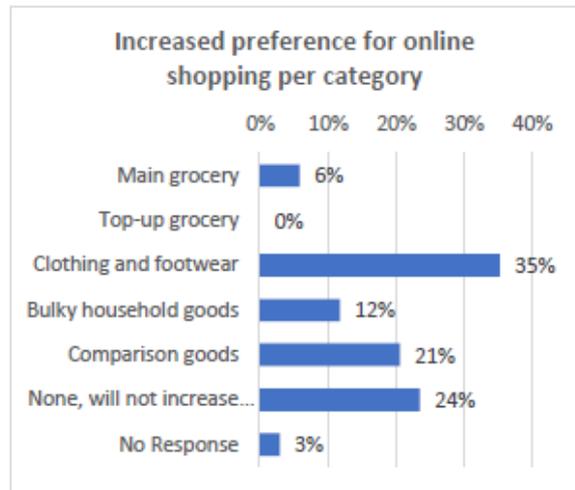


Choice (variety) and convenience were marked as the most important determining factors for preference of a shopping location across all three shopping categories. More specifically, 25% and 17% of respondents mentioned that variety drives shopping location preference for bulky goods and clothing & footwear shopping respectively. 20% of respondents mentioned convenience as an important factor for grocery shopping location. However, 58% of respondents indicated that they now shop closer to home, even if less offerings/services are available in their immediate surroundings. Car travel was listed as the main mode of transport for all types of shopping for respondents in Kilrush.



Online Shopping





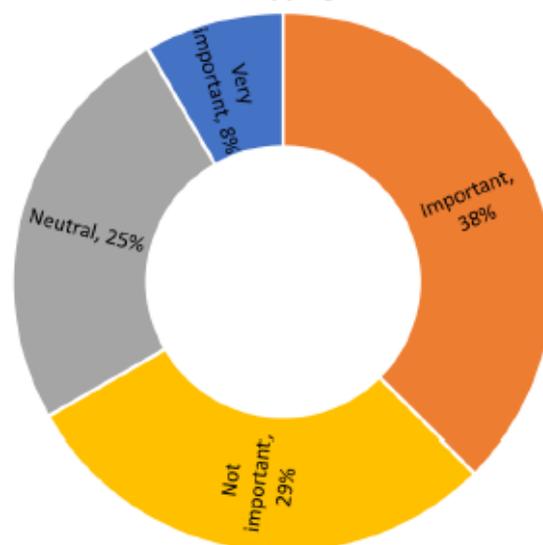
For those opting to shop online and increase the use thereof, the convenience, health and safety, affordability and availability of products motivate further online shopping.

As seen in overall results, respondents' intent for online shopping for clothing & footwear will increase by 35%, while 24% will not change their tendency for online shopping.

Generally, respondents still prefer physical shopping for groceries, with only 6% considering increasing online shopping for these items.

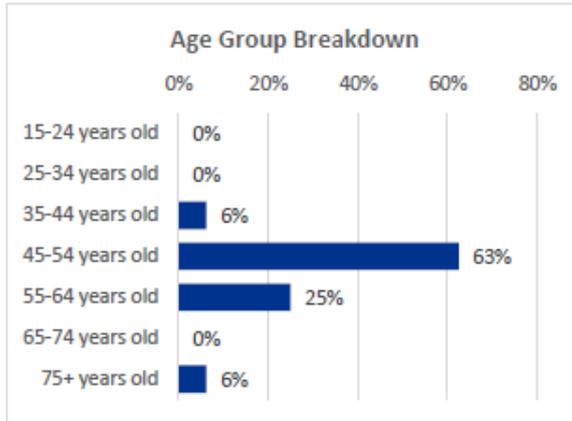
46% of survey respondents indicated that the availability of leisure or other retail services when shopping has a level of importance, while 29% disagreed.

Importance of leisure or other retail services when shopping



4.3.5 Scariff Catchment

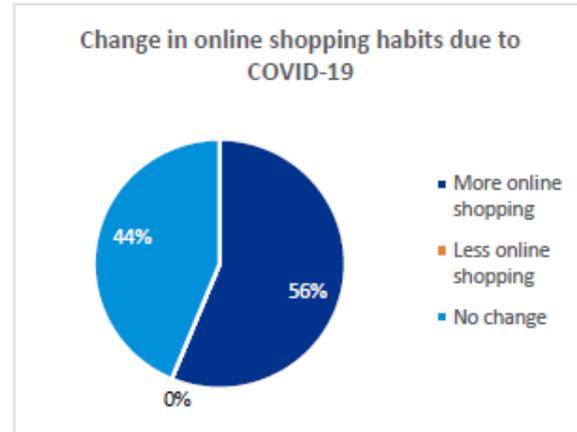
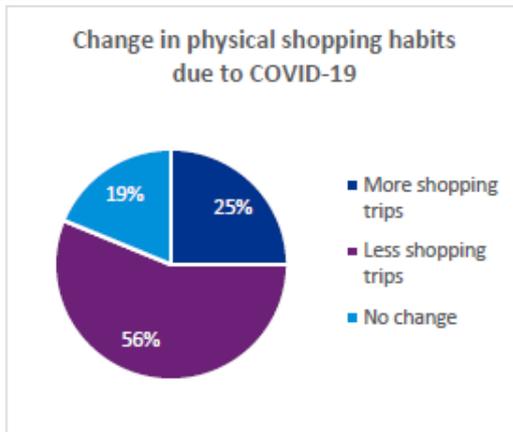
Demography



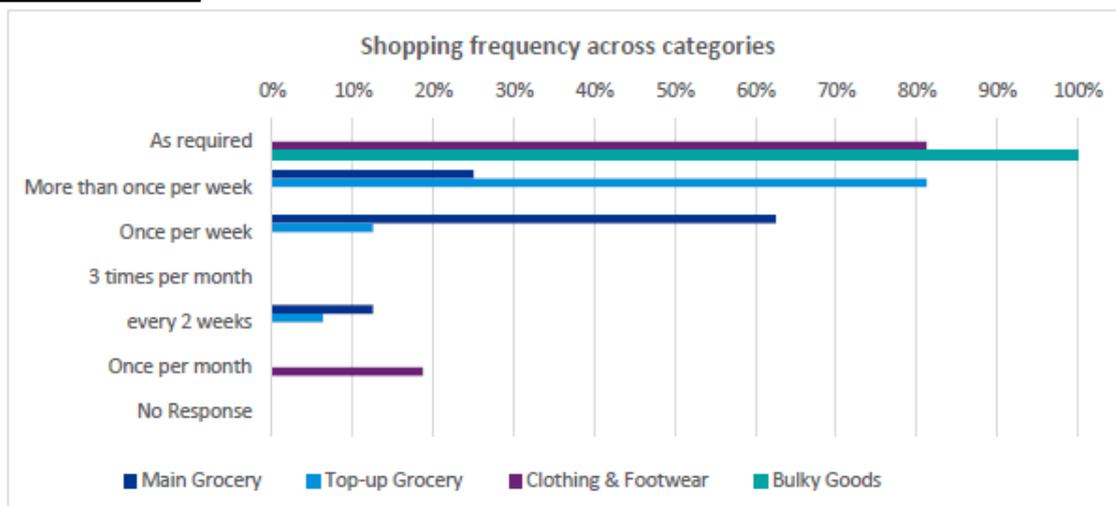
Survey Method	#	%
Phone	8	50%
Online	8	50%
Total	16	
County Clare	802	

63% of the survey respondents in Scariff indicated that they are in the 45-54 age cohort, with a further 25% recorded in the 55-64 age cohort. Since the onset of COVID-19, just over half (56%) of all respondents have been on less shopping trips (better planned trips, larger basket sizes), with 56% opting for more online shopping. 44% however indicated that they did not change their online shopping habits, with 25% of respondents actually increasing their physical (on-site) shopping habits.

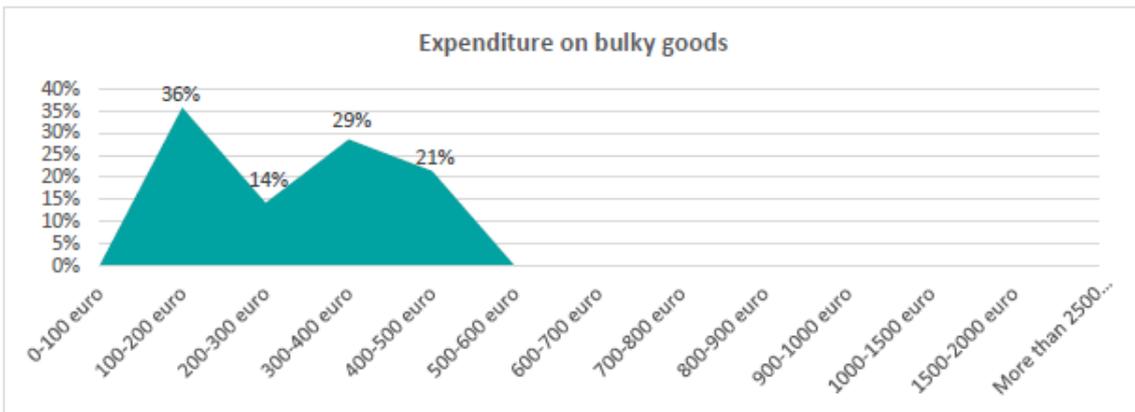
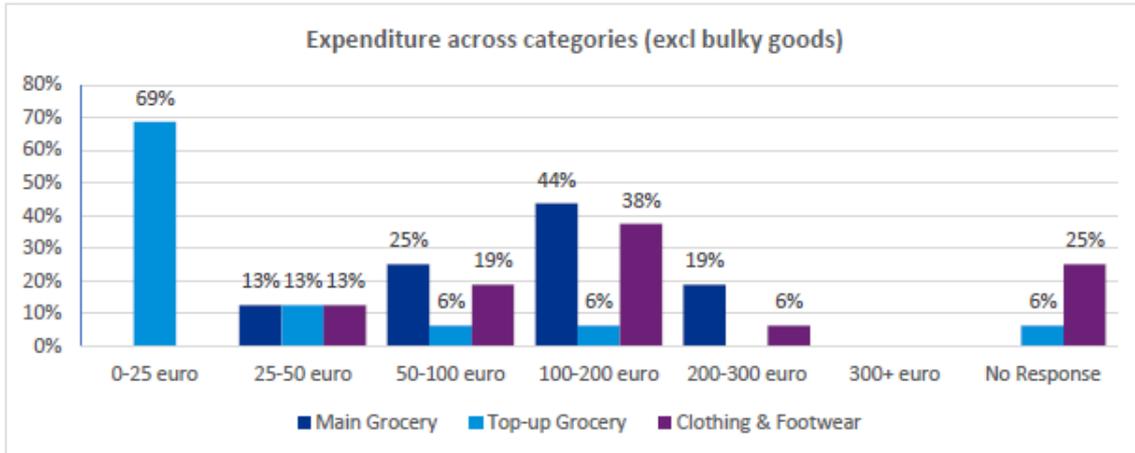
COVID-19



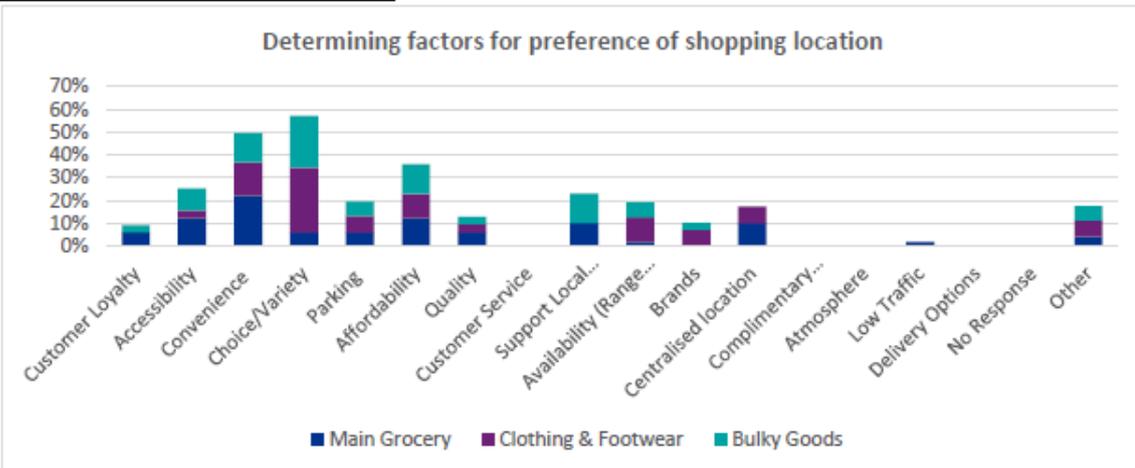
Shopping Habits



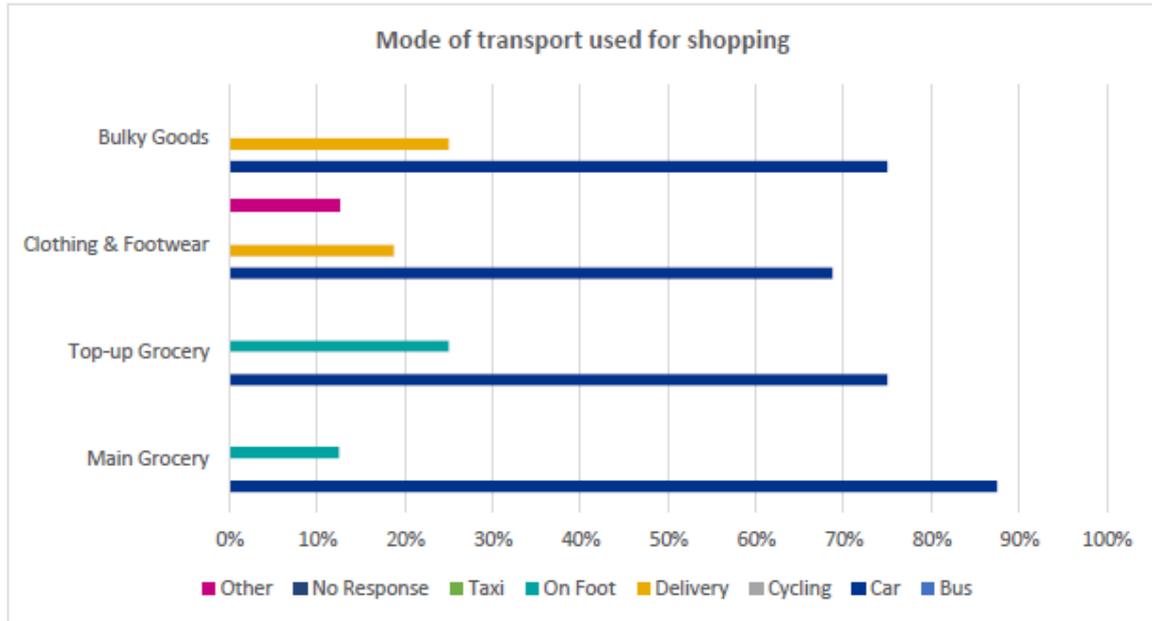
Shopping for clothing, footwear, and bulky goods are mostly done as and when required, with 19% of respondents indicating a monthly shop for clothing & footwear. 88% of shopping for main groceries is done at least weekly, with 81% of respondents doing an additional top-up shop more than once a week. 69% of top-up shopping does not exceed a value of €25, with 46% spending €100-€200 on main groceries. Similarly, majority of expenditure on clothing & footwear was also between €100 and €200. In turn, all respondents reported expenditure on bulky goods ranging between €100 and €500.



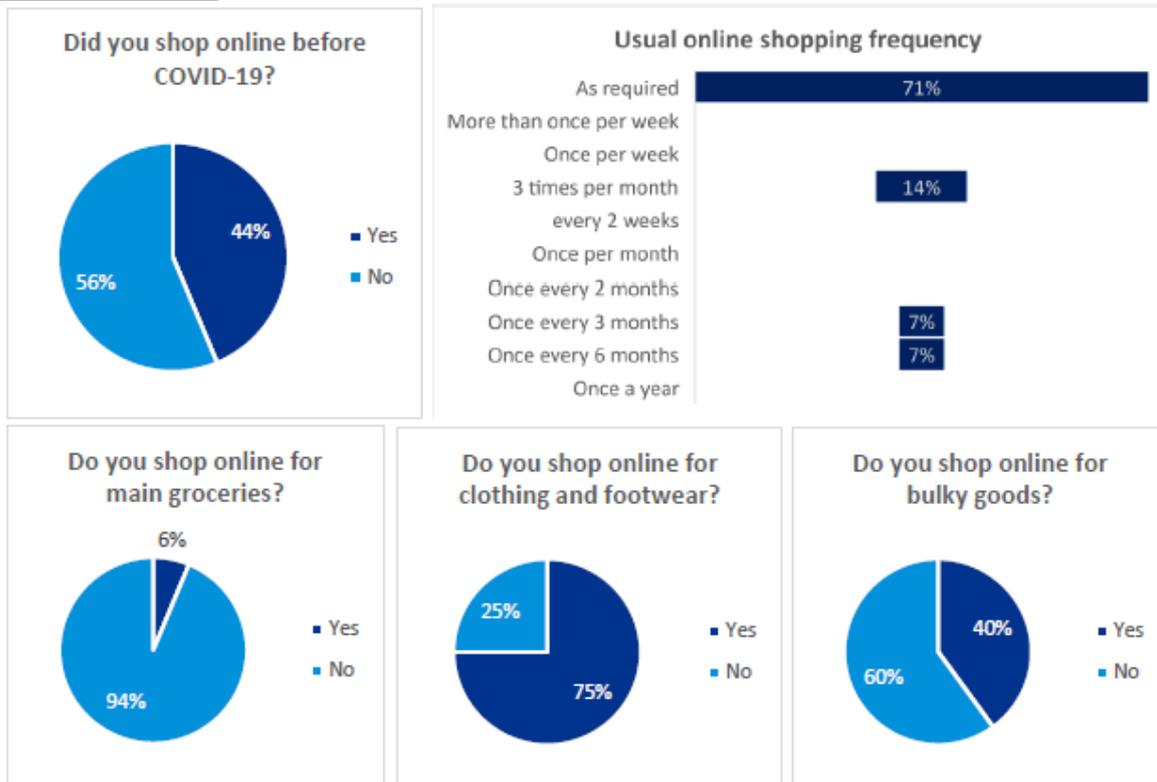
Shopping Location & Transport



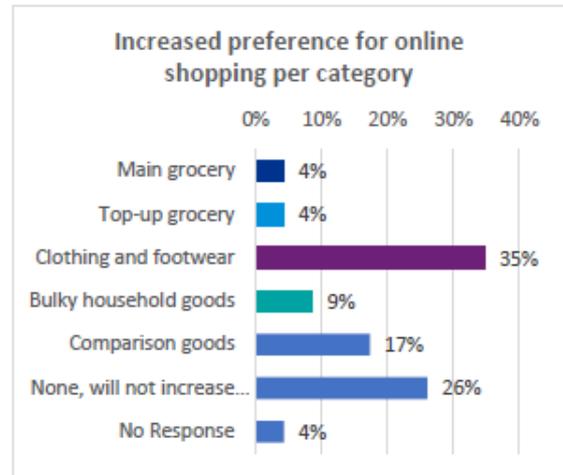
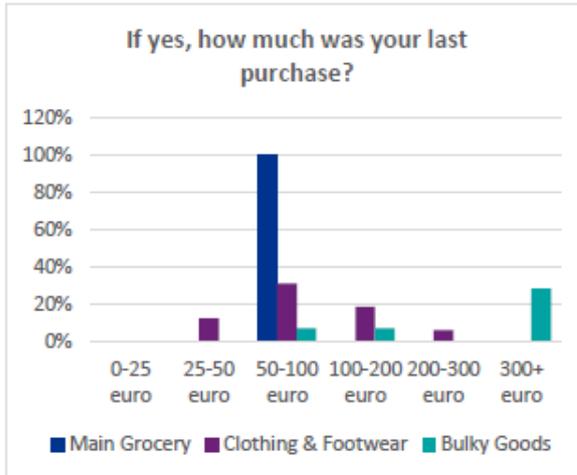
Choice (variety) and convenience were both recorded in equal measure as important factors in the preference of shopping location for clothing & footwear (29%) and bulky goods (23%). In comparison, convenience was listed by 22% of respondents as an important factor in deciding where to do main grocery shopping. Affordability was highlighted in equal measure by respondents across all shopping types, while the support of local businesses and accessibility have an influence on where respondents would shop for groceries and bulky goods. Car travel was listed as the main mode of transport for all types of shopping for respondents, despite the 25% of respondents who would walk when doing top-up grocery shopping. Delivery options were mostly considered for bulky goods (25%) and clothing & footwear (19%) shopping.



Online Shopping



Only 44% of respondents in Scarriff indicated that they actively used online shopping before the onset of COVID-19, compared to the 56% who indicated that they will make more use of it going forward. Reflecting the low use of online shopping for main groceries and bulky goods, 71% of respondents indicated that online shopping is only used as required. While the majority of respondents do not prefer online shopping for main groceries or bulky goods, 75% do make use of online shopping for clothing & footwear. For those who use online shopping, expenditure on clothing & footwear is quite disparate, while expenditure on groceries is relatively higher compared to physical shopping, with all respondents shopping online spending between €50 and €100.



For those opting to shop online and increase the use thereof, the convenience (28%) and health and safety (15%) aspects thereof are regarded the main motivators. Respondents' preference for online shopping for clothing & footwear is set to increase with 40%, while 19% are not expected to change their tendency for online shopping.

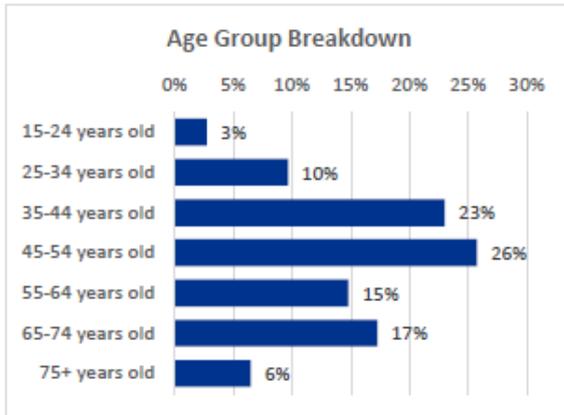
Generally, respondents still prefer physical shopping for groceries, with only 8% considering increasing online shopping for these items.

The availability of leisure or other retail services when shopping has no importance to 38% of survey respondents, 19% felt indifferent to it, while 44% do attach a level of importance to it.



4.3.6 Limerick Catchment

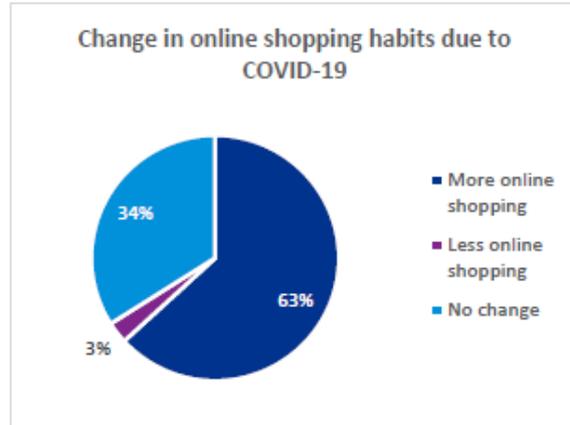
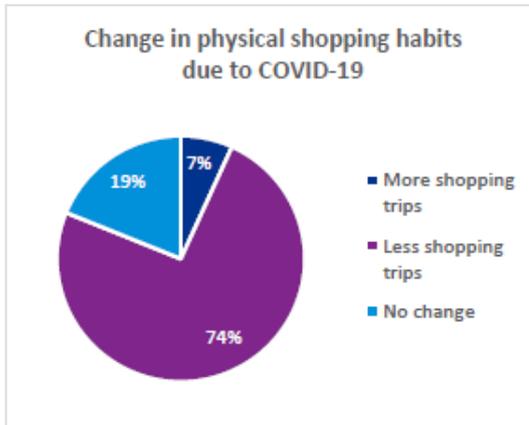
Demography



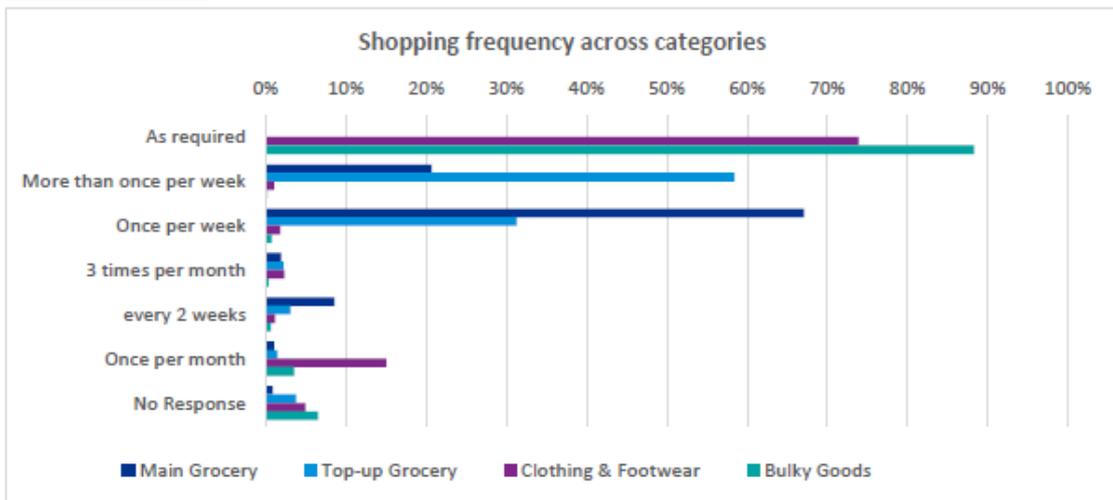
Survey Method	#	%
Phone	381	55%
Online	316	45%
Total	697	

59% of the survey respondents from the Limerick Catchment Area are between 25 and 54 years, with 17% over the age of 65, giving a representative demographic split. Although 19% mentioned no change in their shopping habits, 74% of all respondents have been on less shopping trips (better planned trips, larger basket sizes), with 63% opting for more online shopping during the pandemic.

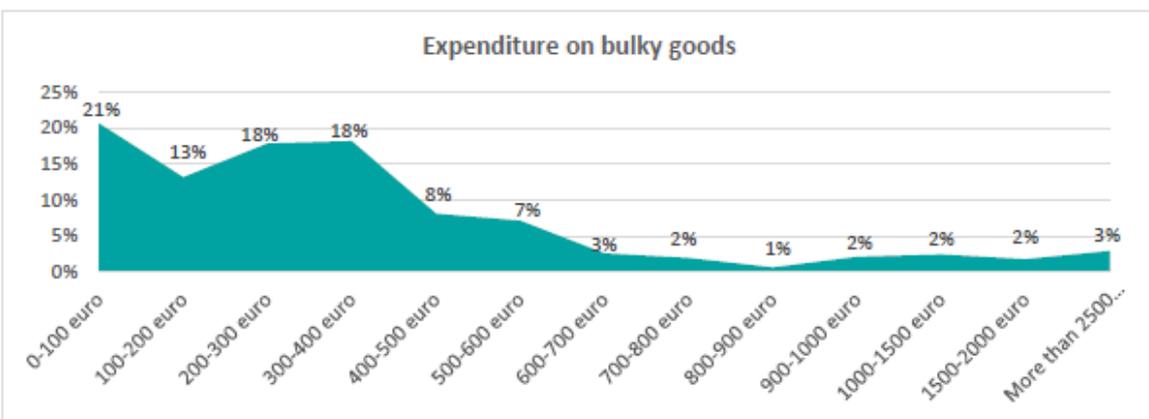
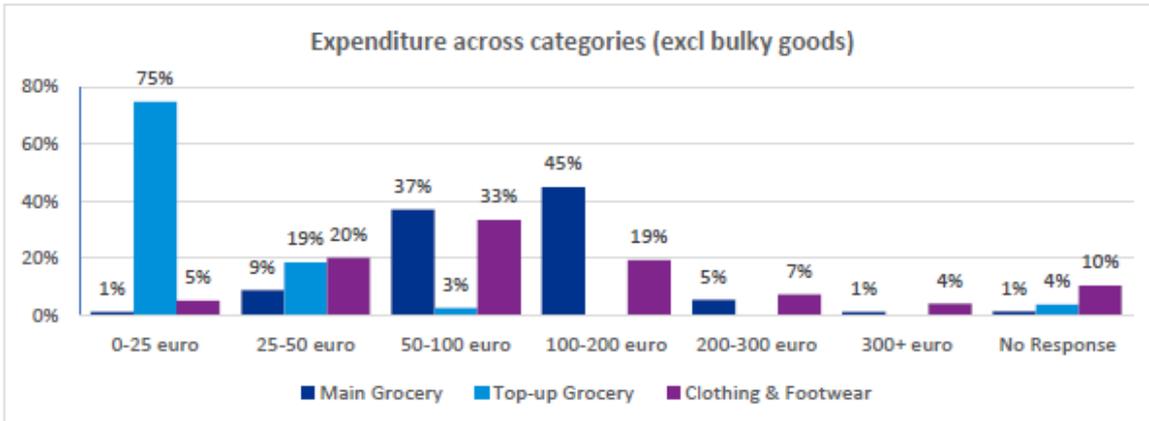
COVID-19



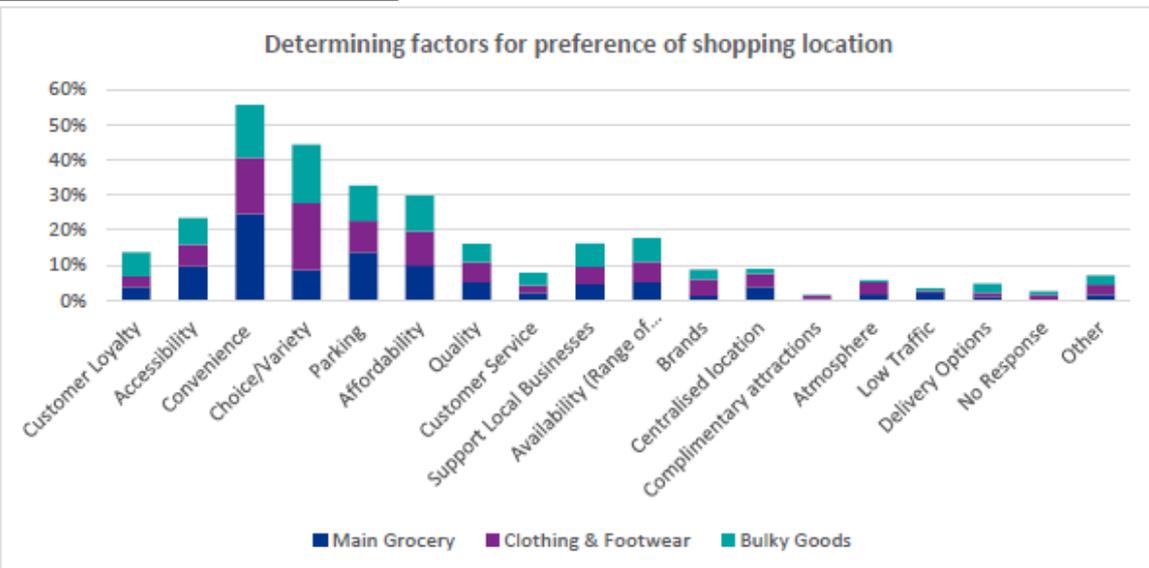
Shopping Habits



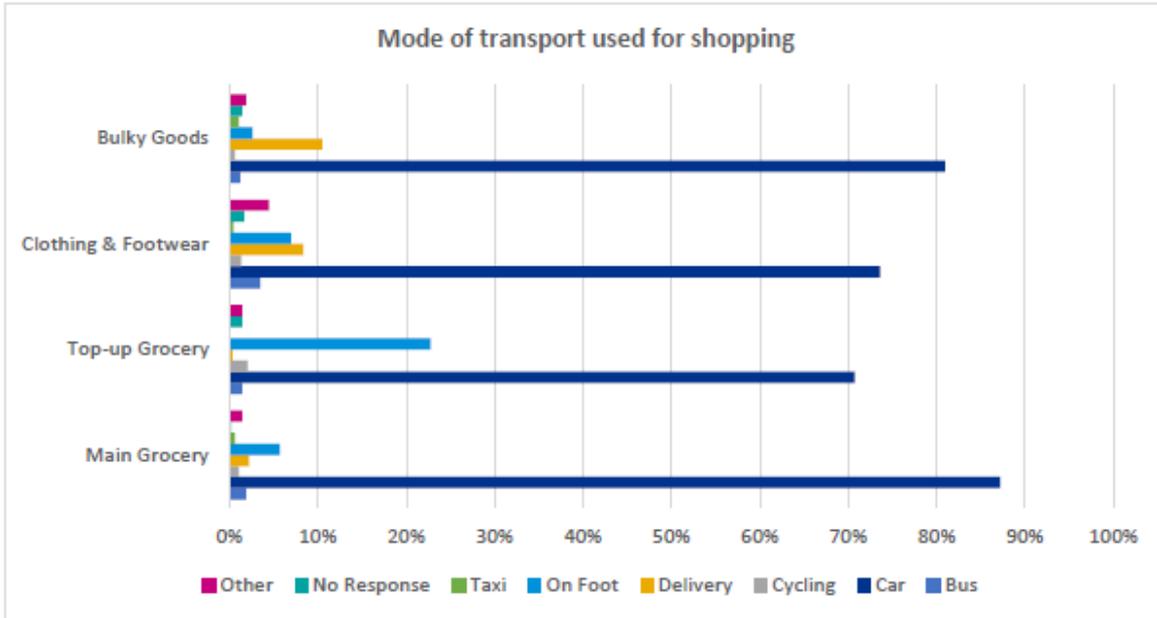
Shopping for clothing, footwear, and bulky goods are mostly done as and when required, with 15% of respondents indicating a monthly shop for clothing & footwear. 67% of shopping for main groceries is done at least weekly, with 58% of respondents doing an additional top-up shop more than once a week. The majority of top-up shopping does not exceed a value of €25, with 37% of respondents spending €50-€100 and 45% spending €100-€200 on main groceries. Similarly, majority of expenditure on clothing and footwear was also between €50 and €200. In turn, 70% of expenditure on bulky goods ranged between less than €100 to €400.



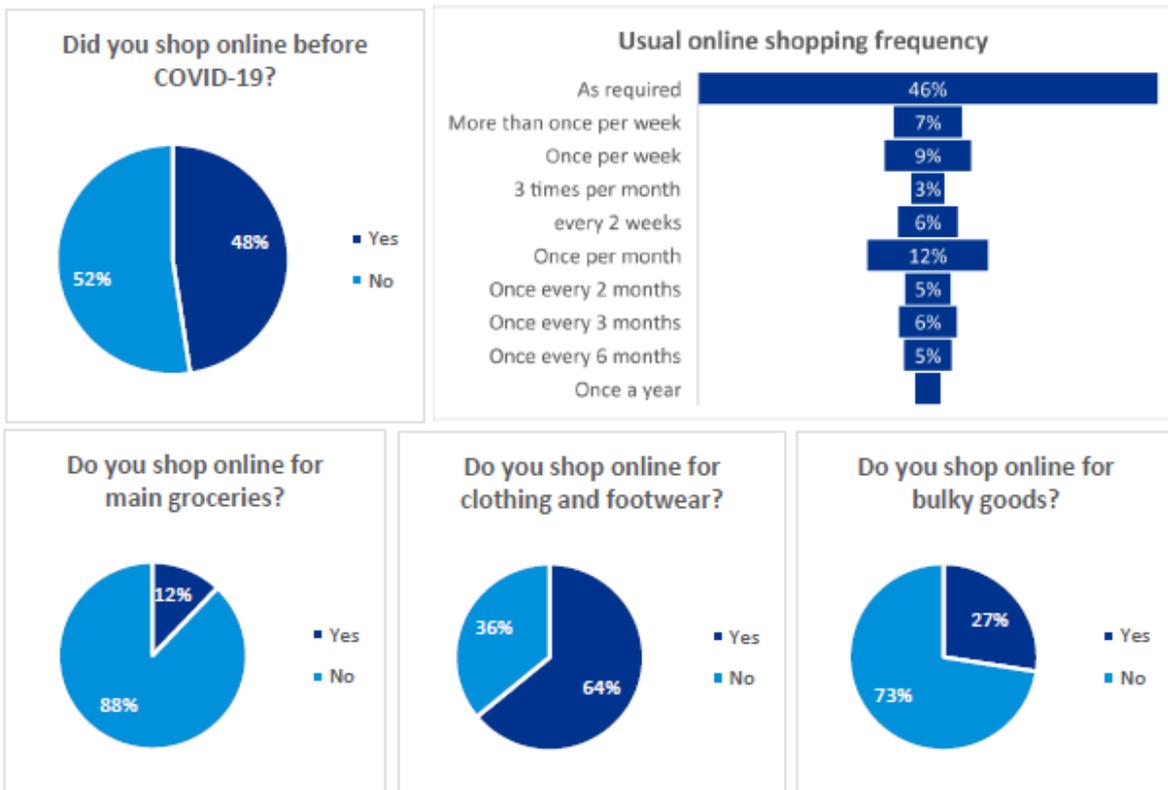
Shopping Location & Transport



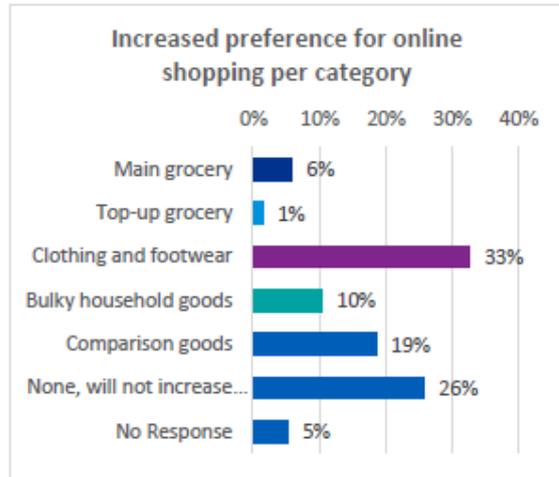
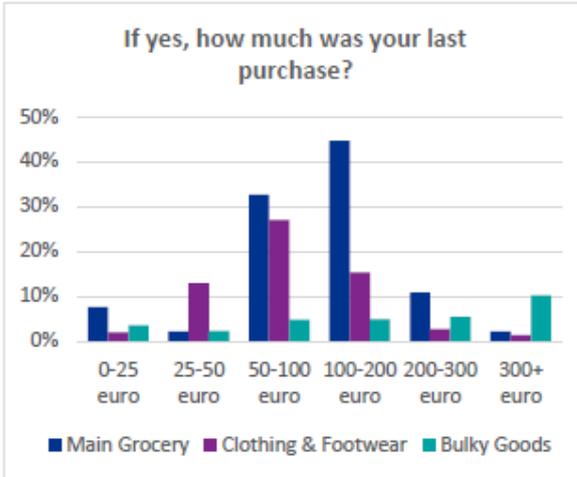
Convenience and choice (variety) were marked as the most important determining factors for preference of a shopping location across all three shopping categories. Approximately 20% of respondents indicated that variety drives shopping location preference for clothing & footwear shopping, while convenience (24%), parking (14%), and accessibility (10%) were recorded as the most important factors for grocery shopping location. Affordability was rated equally important across categories, while the support of local business and availability of products were noted for all three shopping categories. Car travel was listed as the main mode of transport for all types of shopping, although 23% of respondents would do top-up shopping, and 7% do clothing & footwear shopping on foot.



Online Shopping



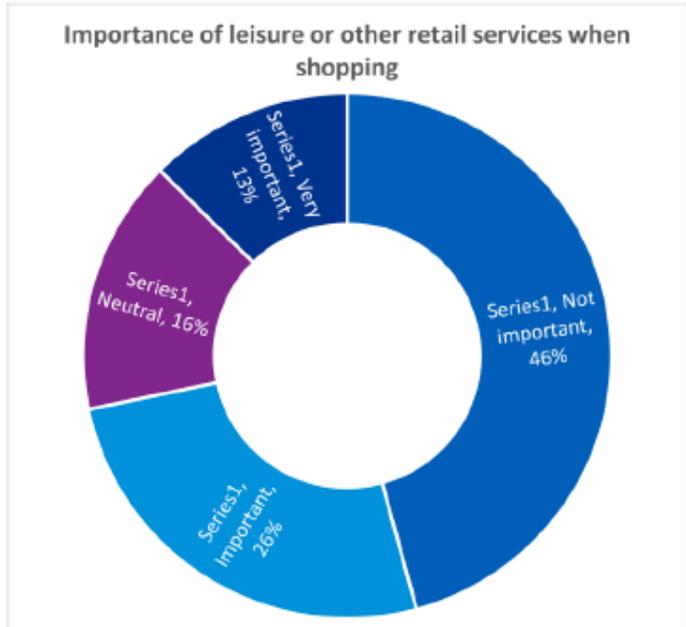
Although 60% of respondents in the Limerick Catchment would do more online shopping following the onset of COVID-19, only 48% actively used online shopping beforehand. Online shopping is mostly done as required (46%) or monthly (12%), while the majority of respondents still would not prefer online shopping for groceries or bulky goods. Despite that, 64% do shop online for clothing & footwear. For those who do shop online, expenditure on clothing & footwear is quite disparate, while expenditure on groceries is relatively higher using online shopping compared to shopping at location, with 45% of respondents' expenditure in the €100-€200 bracket.



For those opting to shop online, the convenience, variety, and health and safety aspects it provides were highlighted as motivation for its increased use. Other motivations were the ease of being able to shop 'anywhere at anytime' with the prospect of delivery, and being able to compare prices over a large variety and availability of goods.

Results from the catchment indicate that 33% of respondents intend to increased online shopping for clothing & footwear, Only 6% of respondents would shop more online for main groceries, with 26% not changing their tendency for online shopping.

39% of survey respondents indicated that the availability of leisure or other retail services when shopping has a level of importance, while 46% do not see its importance.



4.3.7 Summary of Key Survey Results

The following section provides an overview of the key points highlighted from the survey results across each County and the selected catchment areas.

Demography

Summary

A sum of 1,394 survey results was collectively gathered using telephone and online survey methods. The surveys conducted reported the majority of survey results (97%) originating from respondents in the functional area of Limerick City and County Council and Clare County Council, with the remaining 3% of results spread across 11 other counties (including Cork, Tipperary, and Galway). The table below provides an overview of the number of survey responses in County Clare and other Counties.

Table 4.1: Number of survey responses per County

Survey Method	Co. Clare	Other Counties
Phone	259	346
Online	543	246
Subtotal	802	592
Total	1394	

The age group breakdown of the survey respondents provides a good representation of age groups, with 61% of respondents between the ages of 25 and 54 years, and 31% between the ages of 55 and 74 years. The figure below provides the age group breakdown for all respondents across the 13 Counties represented.

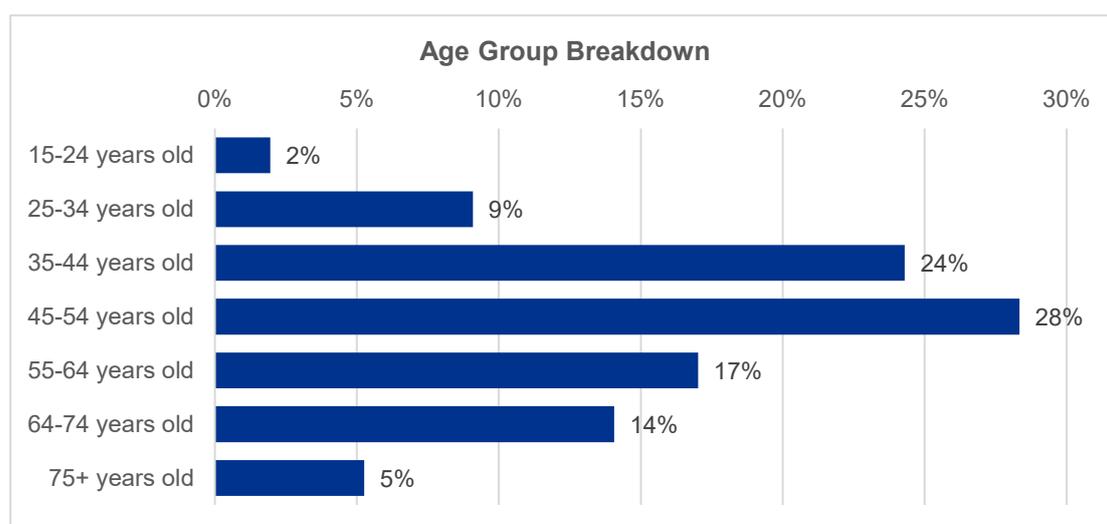


Figure 4-1: Survey respondent age group breakdown

Key Insights

- The age group breakdown of survey respondents is generally similar at County level, with approximately half of respondents between 35 and 54 years of age. This applied to the areas of Kilrush and Ennis as well.
- However, the age group of respondents from Shannon, Scariff and Ennistymon are on average older, with Shannon recording 26% respondents in the 65-74 years cohort, Scariff recording 63% respondents in the 45-54 years cohort, and Ennistymon recording 54% respondents between the ages of 45 and 64.

COVID-19

Summary

A series of questions requested feedback from respondents on the influence that the recent COVID-19 precautionary measures imposed by Government have had on their general shopping habits. The following figures provide an overview of the responses received.

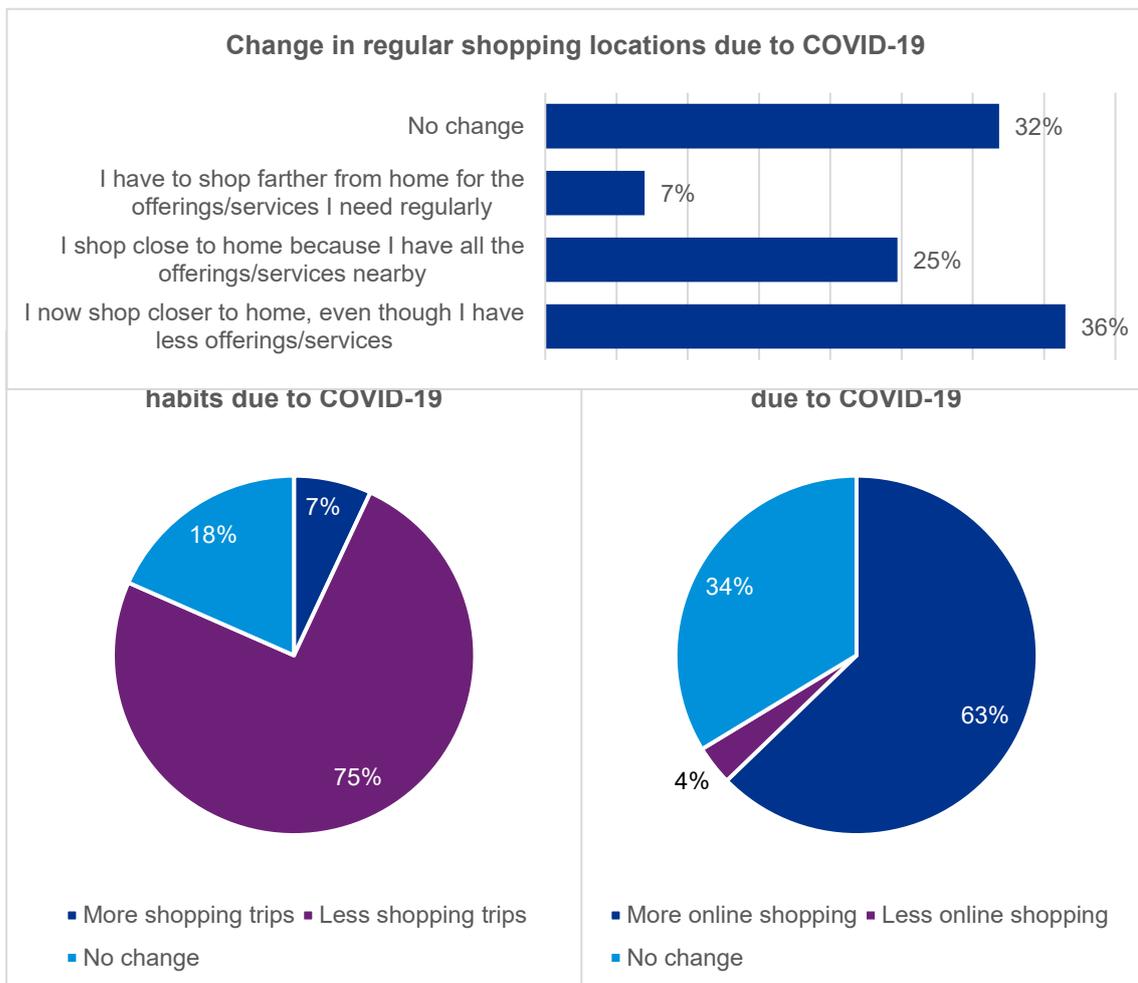


Figure 4-2: Change in regular shopping frequency and location

The predominant effects of the COVID-19 precautionary measures indicated a move away from physical shopping towards online alternatives. This was highlighted by the 75% shift toward reduced shopping trips (better organised trips, with generally larger basket sizes). Accordingly, respondents’ tendency to use online shopping alternatives increased by 63%. Notably, approximately a third of respondents indicated no change in online shopping habits, indicating a prevalent and pre-existing use of online shopping options.

Although 32% of respondents indicated that their usual choice of shopping location did not change in response to COVID-19 precautionary measures, 36% of other respondents indicated the curtailment of their shopping movements and were inclined to shop closer to home, even though they did not have access to all the offerings or services as before.

Qualitative feedback from the phone survey process highlighted that respondents did not see the need to complete a retail survey if they were not allowed to do shopping as they normally would. A general negative connotation was noted between the COVID-19 precautionary measures and the retail activity, with multiple respondents providing ‘no response’ feedback on questions and attributing the lack of feedback to their ill experience of shopping under the COVID-19 precautionary measures that limit retail trade.

Key Insights

— Physical Shopping Habits

- Results at County and Metro Area level show that 70%-75% of respondents reduced their number of physical shopping trips due to the COVID-19 precautionary measures put in place. Shopping trips were reduced, with basket sizes increasing and better planning of retail activities.
- 93% of respondents in Ennistymon recorded a decrease in the number of their physical shopping trips, compared to the 56% in Scariff.
- Responses at local level were quite disparate. 25% of respondents in Scariff indicated that they increased their number of physical shopping trips under COVID-19 precautionary measures.
- While some disparity on the influence of COVID-19 precautionary measures exist at local level, 33% of respondents in Kilrush indicated that the measures had no impact on their physical shopping routines. Similar results were seen for the Metro Area (23%), Scariff (19%), and Ennis (18%).

— Online Shopping Habits

- At County level, approximately two-thirds of respondents have increased their online shopping, compared to a third of respondents whose online shopping habits have not been influenced by COVID-19 precautionary measures.
- As reflected in the physical shopping habit data, 44% of respondents in Scariff mentioned no change in online shopping habits brought on by COVID-19 precautionary measures.
- On average, 33% of respondents from the County Clare towns of Shannon, Ennis, Ennistymon, and Kilrush also recorded no change in their online shopping habits.

Shopping Habits

The results from a series of questions were analysed to highlight shopping habits in terms of frequency and expenditure.

Summary

As seen in Figure 4-3, the majority of respondents indicated that clothing & footwear, and bulky goods are generally purchased as required. 16% of respondents did however that clothing & footwear shopping is generally done on a monthly basis. In comparison, and as expected, main grocery shopping and top-up shopping is done mostly once a week and more than one a week, respectively.

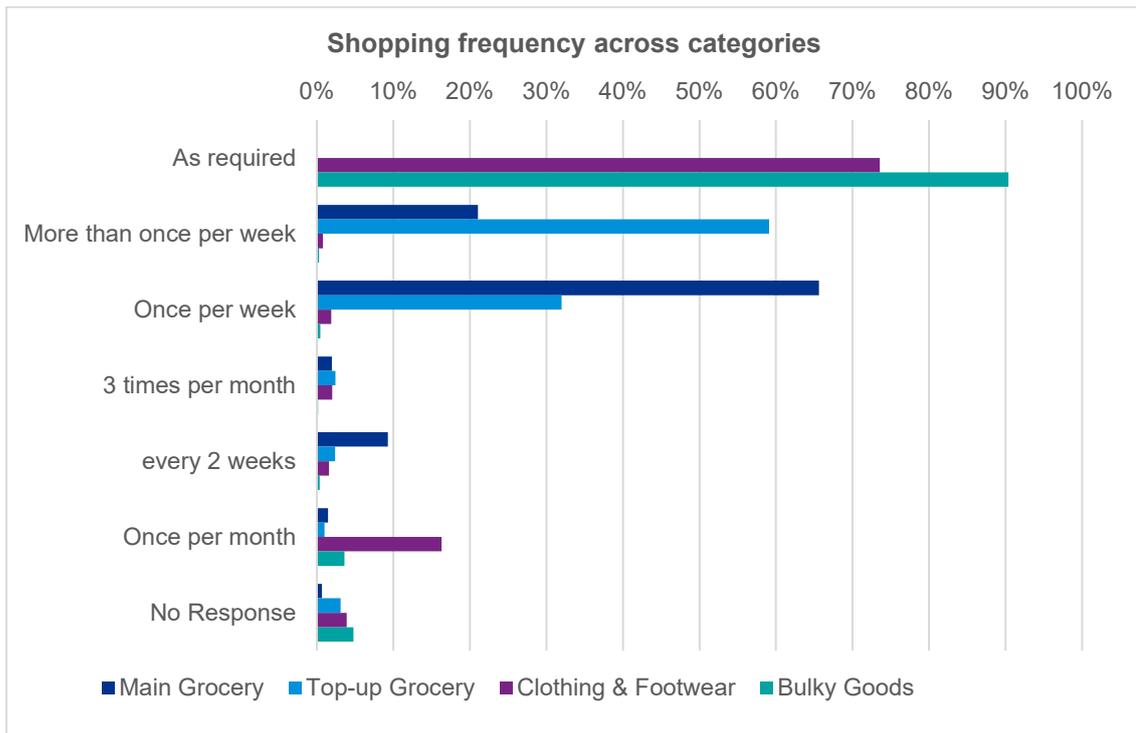


Figure 4-3: Shopping frequency across categories

In accordance with the shopping frequency, it is noted that top-up shopping is done frequently and mostly at a basket value not exceeding €25. Expenditure on clothing & footwear is represented in each of the expenditure brackets, with 57% between €50 and €200. More than 80% of respondents indicated spend on main groceries between €50 and €200, with 46% thereof between €100 and €200.

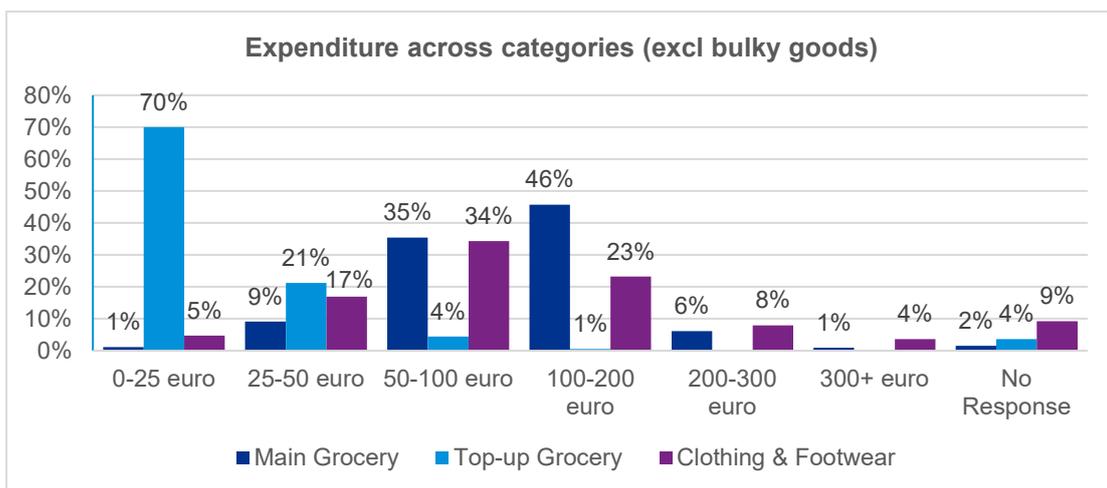


Figure 4-4: Expenditure across categories (excl. bulky goods)

In turn, 34% of expenditure on bulky household goods is valued between €200 and €400, while 8% exceeded €1,000.

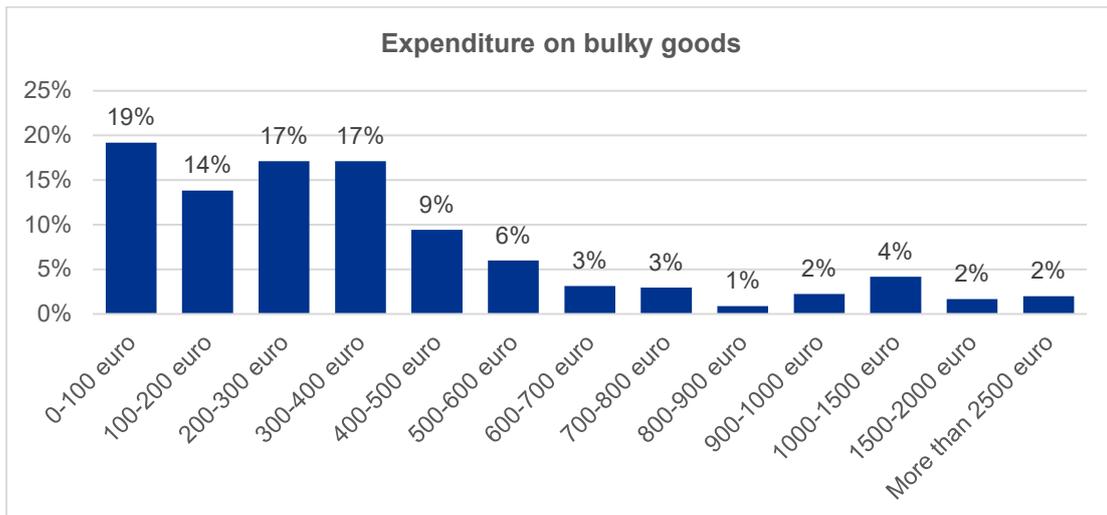


Figure 4-5: Expenditure on bulky goods

Key Insights

— Frequency

- At County and Metropolitan Area level, survey results generally indicated that shopping for clothing & footwear and bulky goods are done as and when required.
- More than 70% of respondents from Ennistymon would shop weekly for main groceries, compared to only 46% of respondents from Kilrush.
- 81% of respondents from Scariff do top-up shopping more than once a week

— Expenditure

- With relatively more frequent main grocery shopping for respondents in Shannon and Kilrush, expenditure is more evenly split between the €50-€100 and €100-€200 brackets, compared to Scariff and Ennistymon, where less frequent grocery shopping sees the majority of expenditure in the €100-€200 bracket.
- Commonly between 60% and 70% of respondents' expenditure on top-up shopping would not exceed €25.
- Where more frequent main grocery shopping is seen, even more respondents spend less than €25 on top-up groceries, as is the case in Shannon (84%)
- As seen in their tendency for monthly clothing & footwear shopping, 47% of respondents from Ennistymon typically spend €50-€100. In turn, where respondents typically only shop for clothing & footwear as required, such as in Kilrush and Scariff, the spend on these items are typically higher (majority in the €100-€200 bracket)
- Expenditure on bulky goods is mainly between less than €100 to €400, with some peak expenditure in the €1,000-€1,500 bracket.

Shopping Location and Transport

Summary

As seen in Figure 4-6, the joint most common factors determining the preference in shopping location across convenience and comparison categories are convenience and choice (variety). When considering grocery shopping, the convenient location of the shopping destination, and the access to sufficient parking facilities trump the choice

(variety) in products provided at that location. This is in line with the data on frequency of grocery shopping, with the frequency warranting efficient and convenient access to shopping locations.

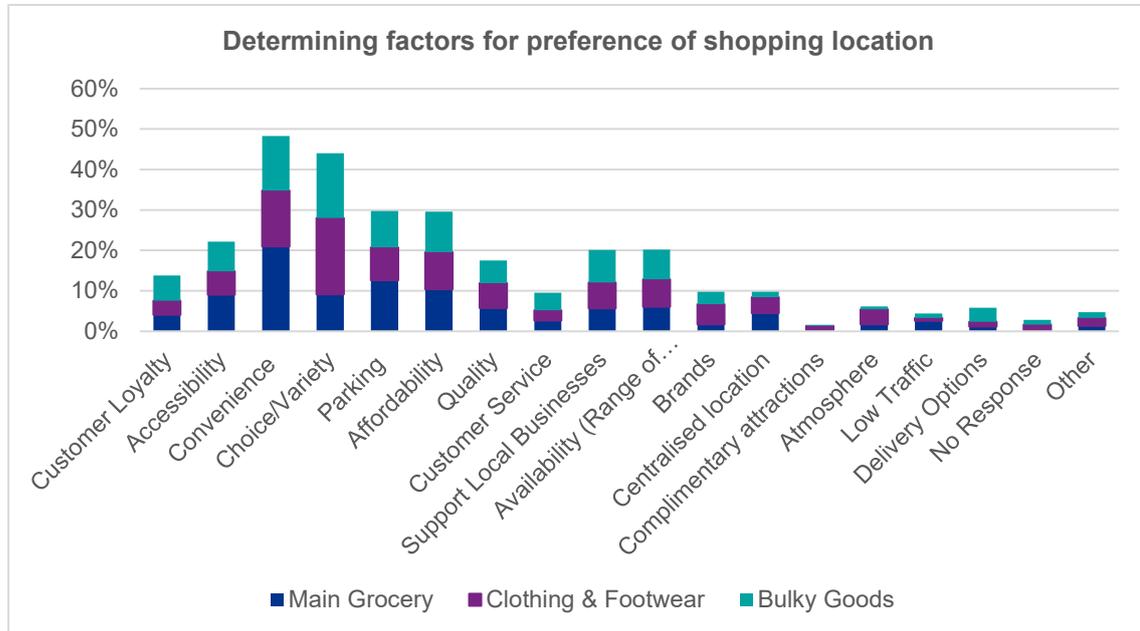


Figure 4-6: Determining factors for preference of shopping location

In turn, respondents indicated that choice (variety) is a key factor when shopping for clothing & footwear and bulky goods. Notably though, affordability is deemed equally important for each shopping type. In total, 20% of respondents noted that the support of local businesses is an important factor in determining shopping location.

On average, 81% of respondents recorded car travel as the preferred mode of transport for all types of shopping, while some would consider travelling on foot for top-up groceries or clothing & footwear shopping. Delivery options are also used, but mainly for bulky goods (10%) and clothing & footwear (7%) shopping. The following figure provides an overview of the statistics recorded.

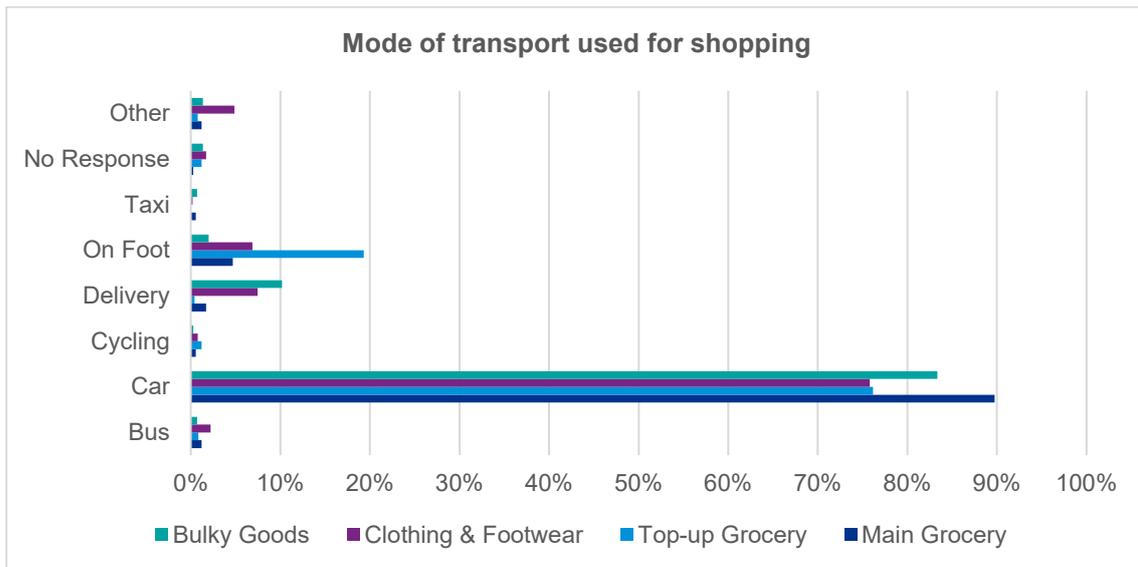


Figure 4-7: Preferred mode of transport when shopping

Key Insights

- Although in different volumes across County, Metro Area and settlement level, convenience (having convenient access to a shopping facility close to home or place of work/school/college) was highlighted as the key determinant factor influencing the choice of shopping location.
- More specifically, convenience is highlighted as the main determinant for grocery shopping location, while choice (variety) is highlighted as the main determinant for clothing & footwear and bulky goods shopping location.
- Respondents from Ennis, and the smaller towns of Ennistymon and Kilrush, recorded the importance of support of local businesses, especially for bulky goods shopping.
- Respondents’ overall preference, and apparent dependency on personal car transport for shopping reflects the importance of parking (ease of parking, parking costs, proximity of parking to shops) and accessibility (convenient access, quality of roads, safe passage for pedestrians/cyclists, accessibility assistance for disabled patrons) in choice of shopping location.
- Affordability ranks joint third in the top five most important factors for choice of shopping location, across all shopping categories and levels of survey analysis. The top 5 most important factors are:
 - Convenience
 - Choice (variety)
 - Parking; and Affordability
 - Accessibility
 - Support of local businesses; and Availability (range of products)

Online Shopping

Summary

Survey respondents were asked to provide feedback on their online shopping habits, how these have changed with the onset of COVID-19, and what they see their online shopping habits might be in future.



Figure 4-8: Online shopping habits and frequency

As seen in Figure 4-8, just more than half of all respondents mentioned that they have actively shopped online before the COVID-19 restrictions and regulations, although the frequency of shopping was mostly as and when a product was required. Online shopping for groceries and bulky goods was recorded to be very low, with only 11% and 28%, respectively, of respondents shopping online for these goods. In comparison, more than two-thirds of respondents would actively shop online for clothing & footwear, as shown in Figure 4-9 below.



Figure 4-9: Online shopping preference per category

Similar to physical shopping, the approximately 80% of respondents would spend between €50 and €200 on online shopping for groceries. In turn, a very small percentage of shopping in the three categories takes place at sales below €50. Online shopping expenditure on bulky goods is spread relatively evenly, with a 12% peak in expenditure exceeding €300. 29% of respondents indicated a level of expenditure on clothing &

footwear between €50 and €100, with another combined 29% of expenditure in the €25-€50 (14%) and €100-€200 (15%) brackets, as seen in the figure below.

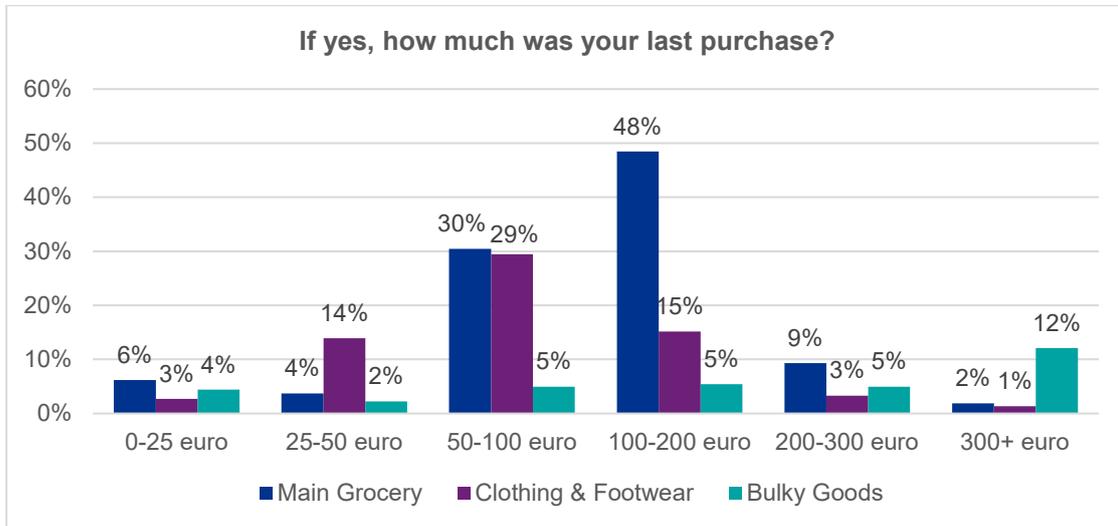


Figure 4-10: Last expenditure on online shopping

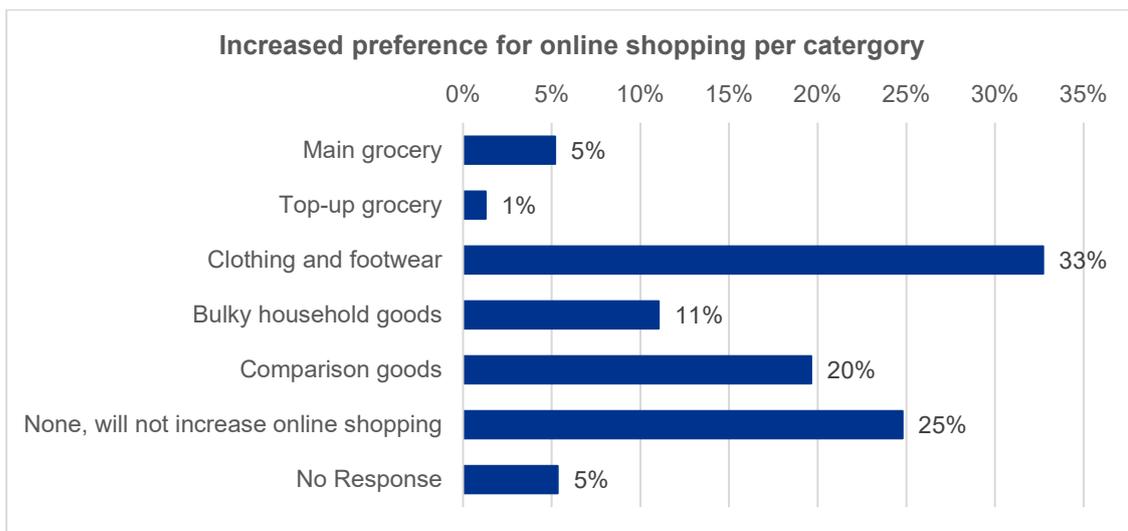


Figure 4-11: Increased preference for online shopping

Being asked whether respondents would have an increased preference for online shopping following COVID-19 and the subsequent adjustment of regular shopping habits, a quarter of respondents still indicated that their online shopping would not increase, as seen in Figure 4-11. Despite the 25% of respondents that would not shop online more frequently, 33% did however indicate an increased preference to shop online for clothing & footwear. This further supports respondents' tendency to shop online for clothing & footwear even before the onset of external behavioural change catalysts such as COVID-19. Additionally, 20% of responses indicated an increased preference to shop online for other comparison goods (small appliances, medical goods, books, etc.). Notably, the increase in online shopping for main and top-up groceries is small. This is also reflected in the general lack of online shopping in this category (89% as seen in Figure 4-9), and the importance of convenience, parking and accessibility (as seen in Figure 4-6) that respondents attach to grocery shopping.

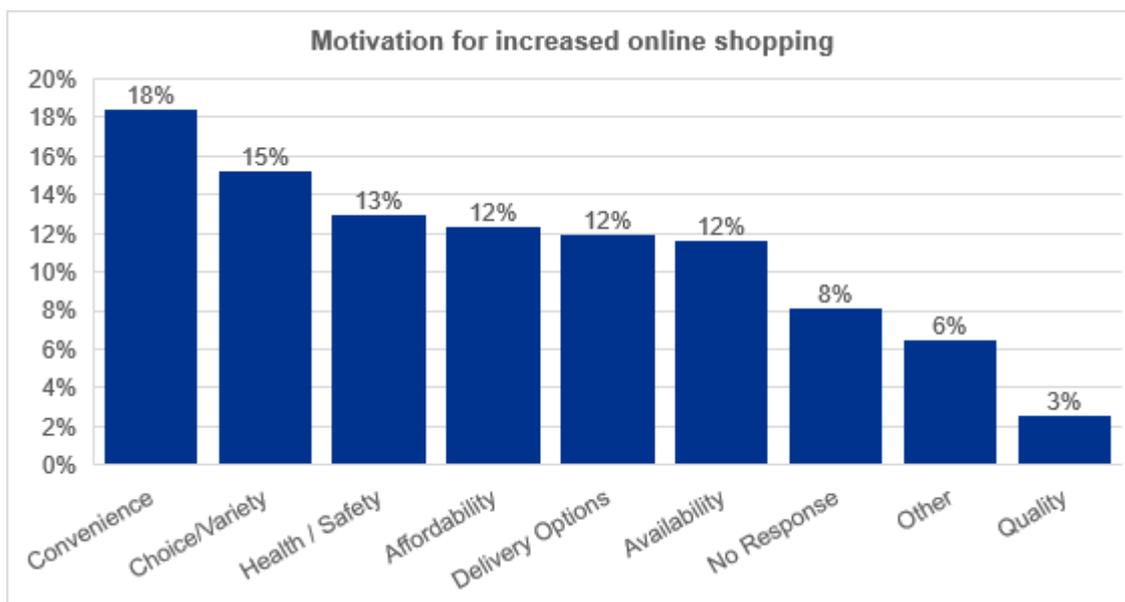


Figure 4-12: Motivation for increased online shopping

For those respondents who would potentially increase their preference for online shopping, Figure 4-12 indicates the factors influencing the motivation for the increase. As seen in the figure above, apart from the convenience and choice (variety) generally associated with online shopping, it is evident that the personal health and safety enabled by online shopping is a large motivator. Additionally, the range of products available online and access to competitive and comparative pricing, with the convenience of delivery, makes online shopping an attractive shopping alternative.

Key Insights

- From survey results gathered, 55% of respondents from County Clare actively used online shopping before the onset of COVID-19 precautionary measures.
- While the majority of respondents over the different survey analysis levels mostly use online shopping only as required, other respondents indicated the use thereof once a month (14%) or every three months (17%).
- The highest recorded use of online shopping for main groceries was from respondents in Ennistymon (20%).
- Online shopping is most popular for clothing & footwear, particularly for respondents in Kilrush (78%), and Scariff (75%). Other settlements also recorded figures between 70% and 75%, while only 62% of respondents in the Metro Area shop online for clothing & footwear.
- Respondents' use of online shopping for bulky goods varied considerably, with 40% from Scariff making use thereof, compared to the 7% of respondents from Ennistymon. Generally, between 65% and 75% of respondents do not use online shopping for bulky goods.
- For those who do shop online, the expenditure on goods tends to be higher compared to physical shopping (with the exception of respondents in Shannon, 50% of which spent only 0-€25 on their last online groceries purchase).

- Following the adjustment of living and shopping with COVID-19 precautionary measures, approximately a third of all respondents will increase online shopping for clothing & footwear. Overall, only 4%-6% of respondents intend to increase online shopping for groceries, even though 14% of respondents from Ennistymon will do so.
- Online shopping for other comparison goods is also likely to increase, with some disparate increase in bulky goods shopping as indicated by respondents from the Limerick-Shannon Metro (9%), Ennistymon (0%), and Kilrush (12%).
- Although online shopping will increase for some, 28% of respondents from the Limerick-Shannon Metro (31% from Shannon) will not increase their tendency to shop online. Similarly, 29% of respondents from Ennistymon, 26% from Ennis and Scariff, and 24% from Kilrush will not increase their use of online shopping.
- Most commonly, the convenience of online shopping (being able to do so from nearly anywhere at any time) was marked as the biggest motivation for its increased use, especially for respondents in Ennistymon (25%) and Scariff (28%).
- The option of delivery associated with most online shopping is generally highlighted, although trumped by the choice (variety) and ability for price comparison provided through online shopping.
- Recent conditions under COVID-19 precautionary measures have also underlined the health and safety aspect provided through the use of online shopping, particularly highlighted by respondents in Kilrush (19%), Ennistymon (16%), and the Limerick-Shannon Metro Area (13%).

4.3.8 Inflow and Outflow

The rate of inflow and outflow of persons to and from retail catchment areas is determined by the analysis of the representative survey respondents' responses to their preference in shopping location for goods in the three retail categories of interest. Survey respondents were asked to confirm their area of residence, and their preferred shopping locations for various goods, which were assessed and provides an indication of people's willingness, preference and need to travel for retail shopping. The results were modelled to provide a rate of inflow to, and outflow and leakage from catchment areas for convenience, comparison and bulky goods shopping.

4.3.8.1 Core Inflow, Outflow, and Leakage

Core outflow refers to the movement of survey respondents (resident in any of the catchments within either County Limerick or County Clare – where relevant to Limerick Catchment) out from one assessed catchment to another for shopping, while leakage refers to the movement of resident survey respondents to other retail facilities outside of either County's boundaries or catchment areas (i.e. movement to other Counties' retail facilities for shopping). Core inflow refers to the number of survey respondents indicating movement into another catchment area (in which they do not reside) for the purpose of shopping, while also including movement of survey respondents, resident in other Counties, into an assessed catchments in County Clare¹⁴.

¹⁴ Changes in the percentage inflow and outflow for 2020 and 2021 were applied in accordance with CSO Retail Sales Index and Central Bank of Ireland figures to account for the changes in movement and retail sales brought on by COVID-19.

The following table provides a summary of the inflow, outflow, and leakage for each catchment area, as calculated from received survey results.

Table 4.2: Summary of Core Inflow, Outflow, and Leakage

County Clare Catchments						
	Area	Limerick Catchment (Incl. Metro)	Ennis	Ennistymon	Kilrush	Scariff
Convenience	Outflow	0.0%	13.3%	16.1%	8.9%	48.5%
	Inflow	5.8%	9.3%	32.2%	12.1%	6.1%
	Static	100.0%	86.7%	83.9%	91.1%	51.5%
Comparison	Outflow	9.5%	47.3%	80.0%	72.5%	90.0%
	Inflow	32.4%	24.6%	5.0%	7.2%	0.0%
	Static	90.5%	52.7%	20.0%	27.5%	10.0%
Bulky	Outflow	8.6%	45.0%	70.0%	70.0%	80.0%
	Inflow	30.3%	20.8%	0.0%	1.5%	0.0%
	Static	91.4%	55.0%	30.0%	30.0%	20.0%

The position of the Metropolitan area in the retail hierarchy, together with the prevalence of well-established city centre and shopping centre retail nodes is reflected in the inflow-outflow results from the survey. The prevalence of established and wide variety of retail facilities give rise to the high levels of ‘static’ respondents, and considerable levels of inflow for shopping into the catchment.

As seen in the table above, the survey response data indicated different results in the assumed movement of people for the three retail types of interest. Respondents residing in the Limerick catchment indicated a general tendency to shop within the catchment for convenience, comparison and bulky goods, which was reflected in the high percentage of ‘static’ responses. There was no recorded outflow of respondents for convenience shopping outside of the Limerick Catchment, although there was limited outflow for comparison (9.5%) and bulky (8.6%) goods. Inflow into the Limerick catchment consisted of 32.4% for comparison goods and 30.3% for bulky goods, which is in addition to the static respondents in each of the aforementioned categories exceeding 90%.

In comparison, outflow from the Ennistymon, Kilrush, and Scariff catchment areas for comparison goods shopping was significant (80%, 72.5% and 90% respectively), with many respondents indicating that they do not shop for comparison goods within these catchment areas. Considerable outflow for bulky good shopping was also recorded for these catchment areas.

4.3.8.2 Online Shopping Expenditure Outflow

Data published by the CSO’s Retail Sales Index¹⁵ on the impact to the retail sector of the Covid-19 crises reveals that the volume of retail sales decreased by 21.8% in January 2021 when compared to December 2020 on a seasonally adjusted basis. On an annual basis, retail volumes were 14.1% lower in January 2021 compared with January

¹⁵ [Retail Sales Index January 2021 - CSO - Central Statistics Office](#)

2020. Retail sales fell across all categories, with the exception of Electrical Goods which increased by 1.3% compared with December of the previous year. Retail sales in January 2021 were 13.6% lower than in February 2020 before the crisis started.

When comparing the volume of all retail sales from January 2021 to the year prior (Figure 4-13), only Food Businesses saw an increase (10.7%) (an equivalent to convenience), with Non-Food (excluding Motor Trades, Fuel & Bars) falling by -17.6% and Books, Newspapers, Stationery and other Goods falling by -3%. Both are an equivalent to comparison goods largely (with some overlap in convenience).



Source: CSO Ireland

Figure 4-13: Annual & Monthly Volume % Changes for Retail Sales January 2021 vs. January 2020 – CSO (March 2021)

These data indicate a significant arrest in physical goods transactions during the period. However, they do not capture online retailing.

The proportion of retail sales transacted online (from Irish registered companies) *increased* to 10.9% in January 2021 from 5.8% in December 2020.

Indeed, this upturn is closely related to lockdown measures restricting the opening of retail premises for much of 2020 and 2021 (as of writing). However, the proportion of online sales from Irish registered companies for Food Businesses was 3.3% in January 2021, an increase from 1.7% the year prior. Whereas non-food (excl. Motor trades and Bars) was 26.1%, up from 7% the year prior. Household equipment saw in increases as well to 15% of sales online, up from 6.4%¹⁶.

¹⁶ Table 7, [Retail Sales Index January 2021 - CSO - Central Statistics Office](#)

When coupled with the unknown levels of international shopping across both categories, and particularly for emerging forms (of point to point collection service providers outside of the convenience stores themselves, e.g. Deliveroo with Aldi and Buymie with Lidl), it can be realistically assumed levels have been much higher – particularly during lockdown periods.

Therefore, an assumed international component has been applied to the consideration of appropriate rates of online retailing (or special forms of trading / SFT), as outflows to the assessed expenditure (set out in Chapter 6). These are supported by reporting CSO data (which began tracking in November 2019) as well as sentiment expressed by the householder survey conducted into shopping habits online pre- and post-Covid-19.

The rates utilised are as follows for 2019, 2020, 2021 and from 2022 to period end:

Table 4.3: Applied Rates of Online Outflow - Informed by Historic CSO and Assumed Future Shopping Habits

Year	Convenience	Comparison	Bulky
2019	5.70% CSO Jan '20 1.7% + 4% intl. assumed	15.20% CSO Jan '20 10.2% + 5% intl. assumed	11.40% CSO Jan '20 6.4% + 5% intl. assumed
2020	8.70% CSO Dec '20 2.7% + 6% intl. assumed	24.50% CSO Dec '20 14.5% + 10% intl. assumed	21.80% CSO Dec '20 11.8% + 10% intl. assumed
2021	8.70% Continuation of 2020	24.50% Continuation of 2020	21.80% Continuation of 2020
2022+	6.00% Assumed 2% Domestic + 4% international	12.00% Assumed 4% Domestic + 8% international	10.00% Assumed 4% Domestic + 6% international

4.3.8.3 Tourism Expenditure Inflow

The tourism sector has been disproportionately impacted by Covid-19 and the interim loss of this vital source of expenditure inflow into the study area presents a significant challenge for the viability of many retail businesses in convenience and comparison forms. Indeed, the latest statistics available at the time of preparing this study indicate that there has been a seismic impact in the sector's overall numbers, in both visitors and correspondingly in revenue.

With the CSO noting that there had been a -95.5%¹⁷ decline in arrivals from overseas travellers in January 2020 vs 2021. Naturally the domestic market has similarly evaporated. This is not surprising given during much of 2020 and 2021 the sector has required significant closures or a complete shutdown due to implementation of necessary health and safety measures.

With the rollout of the national vaccination program underway, in tandem with similar programmes internationally – and critically in key overseas markets, the outlook for a recovery scenario in both domestic and overseas tourism inflow back into the local economy is bright.

Despite these extraordinarily difficult times, it is important to be mindful of the fact that pent-up demand for travelling remains significant, as does built-up disposable income (>€11bn, of which €5bn may be spent as soon as the economy reopens)¹⁸. Once travel and operational restrictions lift and the sector sustainably stays open, collected sentiment points to a strong desire to return to pre-COVID-19 levels.

In June 2020, the Irish Tourism Industry Confederation (ITIC) published its first Tourism Industry Revival Plan; setting out a pathway for recovery contingent upon health care developments. In January 2021 this was revised¹⁹ to account for the commencement of the vaccine programmes, as the first major step towards seeing that recovery materialise.

Though the challenges of reopening the sector are not equal, neither geographically, nor by type of industry, the ITIC has produced a comprehensive outlook based around an evidenced based options analysis of the likely trajectories towards recovery starting in 2021.

Three scenarios – Optimistic, Base and Downside are presented as a set of possible or plausible paths to recovery based on current available information, assumptions and risks (see Figure 4-14).

¹⁷ [Air and Sea Travel Statistics February 2021 - CSO - Central Statistics Office](#)

¹⁸ [Vol 2021, No.4, Saving during the pandemic: Waiting out the storm? \(Reamonn Lydon and Tara McIndoe-Calder\) \(centralbank.ie\)](#)

¹⁹ [ITIC – Industry Recovery Roadmap – How Irish tourism can recover from an existential crisis](#)

	Scenario A: <i>OPTIMISTIC</i>	Scenario B: <i>BASE CASE</i>	Scenario C: <i>DOWNSIDE</i>
ASSUMPTIONS			
Vaccine	<ul style="list-style-type: none"> - Rollout effected to 60%/70% population in Ireland & most source markets by Q3'21 	<ul style="list-style-type: none"> - Rollout effected by Q4'21/Q1'22 - Uneven distribution 	<ul style="list-style-type: none"> - Delayed effective roll-out; low take-up, or proven ineffectiveness.
Safe travel protocols	<ul style="list-style-type: none"> - Test & trace: comprehensive system in place by Q3 - International agreement on facilitation, e.g. secure health passport system; app. 	<ul style="list-style-type: none"> - Testing: less than adequate system until late 2021 - Fragmented approach with varied standards 	<ul style="list-style-type: none"> - Testing: Absence of, or lack of confidence in system - Haphazard approach without credible norms
Connectivity (Air services vs. S2019)	<ul style="list-style-type: none"> - Short haul capacity: min. 40% 2H'21 rising to >75% S'22 & >90% by S23 - Long haul: min. 35% 2H'21 rising to >65/75% S'22 & >90% by S24 	<ul style="list-style-type: none"> - Short haul min. 35% in Q4'21 rising to >75% by S23 & > 90% by S24 - Long haul 35% Q4'21 rising to 70% by S'23 & >80% by S24 	<ul style="list-style-type: none"> - Short haul < 35% in Q4'21 recovering to >75% by S24 - Long haul <35% Q4'21 gradual increase to 75% by S24
Economy	<ul style="list-style-type: none"> - Global GDP close to +5% in 2021 - Developed economies to pre-Covid growth by '22 - Increased level of consumer savings in target markets - Oil prices remain low in short term months 	<ul style="list-style-type: none"> - Global GDP close to +5% in 2021 - Developed economies to pre-Covid growth by '22 - Increased level of consumer savings in target markets - Oil prices remain low in short term months 	<ul style="list-style-type: none"> - Slower global growth due to continued economic disruption due to coronavirus - Consumer hesitancy re spending - Unemployment & inflation
Demand restart	<ul style="list-style-type: none"> - VFR: Fast rebound from 2H'21 - Leisure: Re-starts <35% from Q3'21 into '22 - Business: 40% level from 2H'21 	<ul style="list-style-type: none"> - VFR: Rebound from Sept./ Oct.'21 - Leisure: hesitant < 25% from Sept. '21 - Business: <40% from Q3'21 	<ul style="list-style-type: none"> - VFR: restarts Q4'21 into '22 - Leisure: restart delayed to S22 - Business: <20% from Q4'21

Figure 4-14: ITIC's outlook of recovery scenarios in tourism sector (ITIC, January 2021)

In summary, each scenario assumes²⁰:

- A. Scenario A – OPTIMISTIC: Travel restrictions be removed by July '21, following effective and on schedule vaccine rollout in Ireland and main source markets, together with coordinated multilateral agreement and implementation of safe travel protocols including testing and vaccination verification.
- B. Scenario B – BASE LINE / MOST LIKELY: Based on current conditions – no international tourist flows before Sept./October '21 with mixed market response due to uneven vaccination rollouts, and delays in establishing universal safe travel protocols. Effective recovery delayed to 2022.
- C. Scenario C – DOWNSIDE: Further delay to restart due to virus surges or tail-risk fears; vaccine effectiveness compromised by new variants; and/or failure to establish universal safe travel protocols.

For the purposes of this study, we have sought to apply **Scenario B** – which is held as the most likely path towards recovery by 2025.

Figures Figure 4-15 and Figure 4-16 display these forecasts at national level for both tourist volumes and revenue.

²⁰ Reference sources: IATA; EuroControl; ACI; McKinsey; UNWTO; WTTC; HSBC; Bain & Company; Tourism Economics; OAG. In-depth interviews with 10 top industry executives (mid Dec.'20-mid Jan.'21); ITIC survey of member organisation (mid Dec.'20)

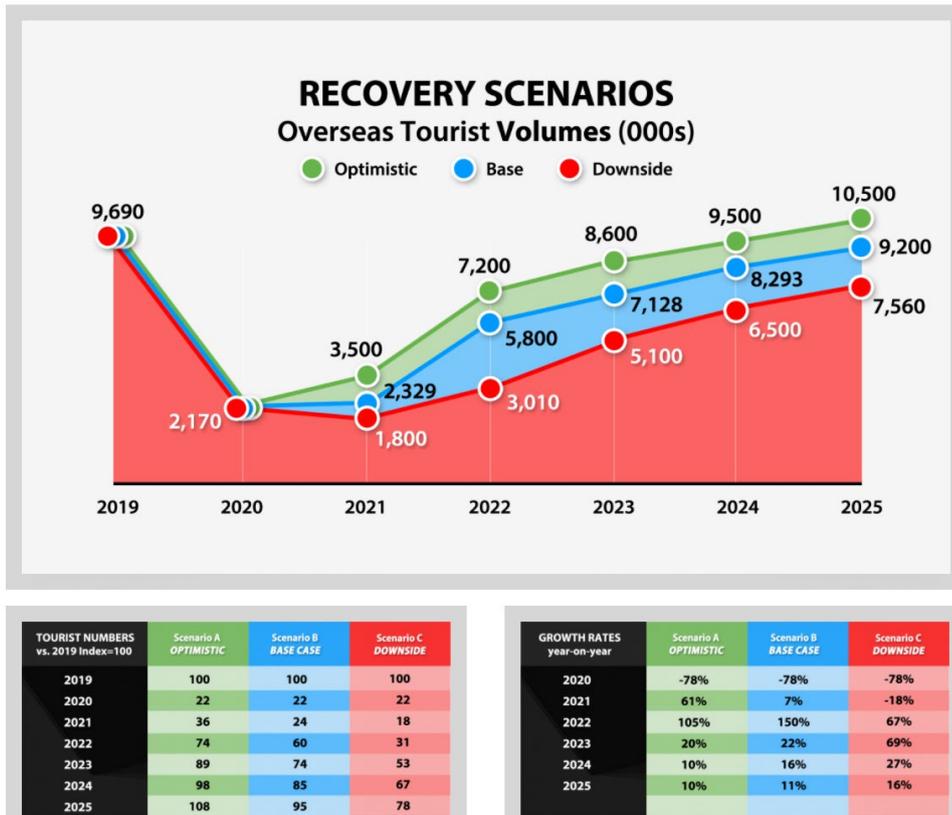


Figure 4-15: ITIC's outlook of recovery scenarios – tourist volumes (000s)

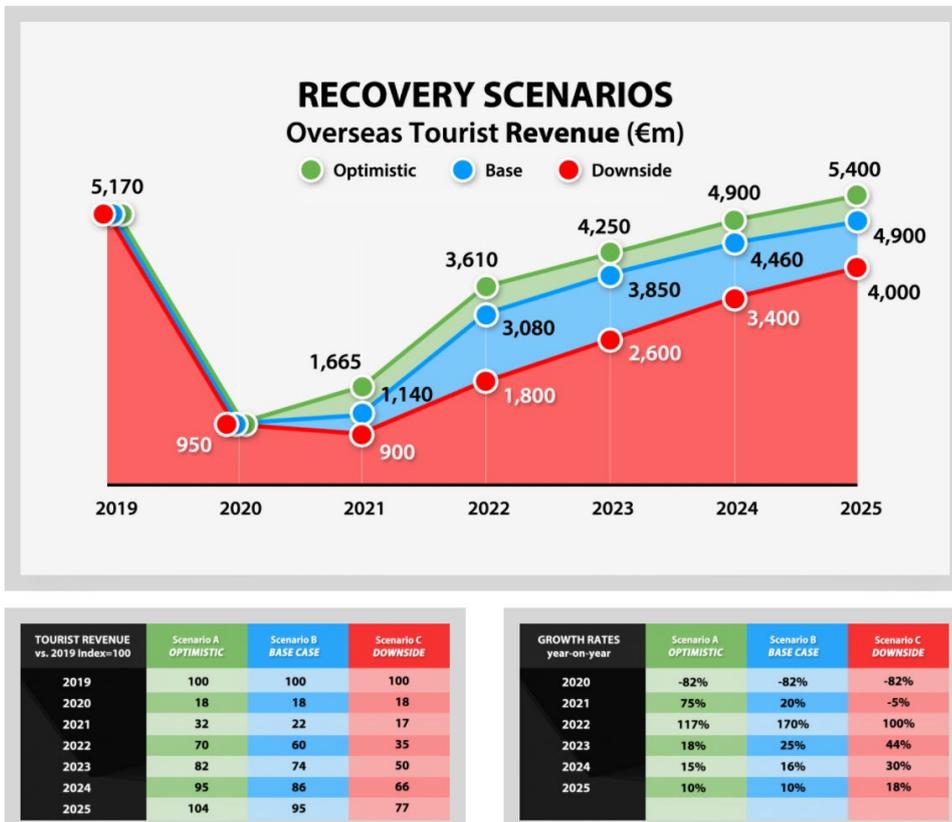


Figure 4-16: ITIC's outlook of recovery scenarios – tourist revenue (€m)

Gauging the impact of inflow expenditure brought about by tourism locally is of key importance in modelling for future floorspace requirements. The incorporation of assumed levels of expenditure are set out in Chapter 6 in this regard, however, in order to localise the ITIC recovery scenario to the local study area itself, historic data on the number of visits by overseas and domestic tourists and revenue estimates at County level have been collated.

This data is sourced through a combination of publications by the Central Statistics Office, Fáilte Ireland and other sources. Specifically, a baseline for historic years 2013 to 2017²¹, 2018 in part²² and for 2019²³ have been collated at County scale across the study area.

Tourist Visits in 2019:

- County Clare:
 - 701,000 overseas visits | 571,000 domestic visits | 1,272,000 total

Tourist Revenue in 2019:

- County Clare:
 - €160m overseas spend | €110m domestic spend | €270m total

The ITIC scenario was then applied to estimate the return in revenue between 2020 and 2025. Beyond 2025, an assumed 5% rate of growth to overseas visitors and revenue was incorporated. This reflected a conservative outlook, supported by median historic growth rates of 6-7% in visitors and 5-10% in revenue across the study area.

On the domestic front, due to high variability in tourist visits and revenue historically, as well as the absence of a clear recovery scenario published by the industry at this time, a conservative phased recovery of 33% of 2019 levels by 2022, 75% by 2022 and 95% by 2023 has been assumed. This reflects an assumed take up of tourism stays following the rollout of the vaccination programme, as well as levels of accrued disposable income available to households as reported by the Central Bank.²⁴ A conservative 1.5% annual rate of growth from 2024 is assumed, supported by historic growth rates of 7-9% in visitors and ~5% revenue across the study area.

These headline figures represent an estimate on total tourism spend, however, for the purposes of this study, only a portion are brought forward for consideration as inflow relevant to the assessment of future retail floorspace needs, specifically spend on convenience and comparison non-bulky goods.

In 2019, approximately 13% of tourism spend is on 'shopping', with another 37% on 'other food & drink'²⁵. Assuming no more than a third of spend in the other food & drink category would be in convenience outlets (vs. restaurants and pubs, etc.), a reduction to

²¹ *Limerick Tourism Development Strategy: Situation Analysis Report 2019-2023*. Limerick City & County Council

²² A figure for 2018 was not available at time of preparation for Limerick

²³ Figures for 2019 provided directly with thanks to Fáilte Ireland.

²⁴ [Vol 2021, No.4, Saving during the pandemic: Waiting out the storm? \(Reamonn Lydon and Tara McIndoe-Calder\) \(centralbank.ie\)](#)

²⁵ [Key-Tourism-Facts-2019. Fáilte Ireland](#)

total expenditure across the study area has been produced to establish an estimate on expenditure inflow for the retail categories of interest only.

Finally, an assumed distribution has been developed in order to further localise this spend down to specific retail catchment area scale. The figures as set out in Table 4.4 were based on a review of tourism attractions in each catchment area, as well as the ordering of the settlement hierarchy, e.g. the influence of and attraction to urban areas, including Limerick City, while recognising some of Ireland’s top tourist sites across Clare. Though this cannot be supported due to a lack of officially published granular data, it is believed to present a realistic reflection of what the distribution may be as of 2019.

Table 4.4: Tourist Spend: Assumed Split by Catchment Area

Tourist Spend: Assumed Split by Catchment Area	
Catchment Area	% of Tourism Relevant Revenue
	% of Clare
Ennis Catchment	25%
Kilrush Catchment	15%
Ennistymon Catchment	30%
Scariff Catchment	10%
Limerick Catchment (<i>spans parts of Clare, see section 6.1.2</i>)	20%
Total Assumed Revenue	100%

A breakdown of these figures, as well as the proportions used per catchment area per annum across the Plan period, are set out in greater detail in Appendix A.5.

5 Town Centre Health Checks

5.1 Overview

This chapter provides detailed analysis of each of the study areas settlements in County Clare as identified by the retail hierarchy. These are Ennis, Shannon, Kilrush, Ennistymon and Scariff. Utilising both qualitative and quantitative methods, the health checks provide a useful insight into each of the settlements' town centres with a specific focus on retail performance and potential. It is important to note that the health checks were carried during the impact of COVID-19 Pandemic on the Irish economy.

The health checks will use the following indicators of viability and vitality as prescribed by the Retail Planning Guidelines (2012):

- Attractions;
- Accessibility;
- Environmental quality and amenity;
- Perception of safety & occurrences of crime
- Diversity of uses;
- Multiple representation;
- Levels of vacancy; and
- Shopping rents and commercial yields

The health checks for the study areas include a series of recommendations for actions to sustain and improve the performance of each town in sustaining a healthy retail sector. Land use surveys carried out as part of this strategy have been used to analyse indicators such as diversity of uses, multiples representation and levels of vacancy. It has also provided a mechanism to quantify the amount of the retail shopping types (comparison, convenience, bulky goods) within the town study areas, as well as the quantum of other commercial uses and vacancies.

Supplementary to the core elements of the Health Check Analysis referred to above are the outcomes of consultations held with retailers and representative groups of each of the study areas. The results of telephone and online surveys also provide an important indicator of the vitality vibrancy and customer experience of the retail centres. This is particularly the case for this strategy, as the capacity to undertake on-street consumer interviews and pedestrian counts was negated by the imposition of governmental 'lock-down' on movement, which particularly impacted on the operation of retail. The findings that emerged from both the consultations have been used to inform the recommendations set out for each town and to confirm and/or redefine the core retail area, the identification of opportunity sites and the formulation of planning policies as set out in Section 7.

5.2 Consultation

In the preparation of this study, several stakeholder consultations were undertaken with town centre retail groups, commercial retail developers, Council representatives and retail market specialists for the area.

The following comments were noted:

- All contributors agreed that a thriving and vibrant Ennis town centre is vital for both the general economy of the region as well attracting investment.
- An attractive town centre is needed for all stakeholders, not just in retail, but for industry and their employees making investment decisions to locate in and around the main settlements.
- There has been relatively little development in retail over the last 10 years. Investment has largely been in food and beverage (convenience).
- All convenience retailing has experienced significant challenges as a result of lockdown measures and prevention from physically trading.
- Convenience retailers have thrived during the lockdowns.
- A combination of low rents and high construction costs makes development in secondary locations largely unfeasible.
- In the short-term, global market conditions entail that investment in significant new retail anchor-based development will be challenging in any location. The proportion of retail floorspace is likely to be reduced in favour of mixed-use development with higher residential and services content in particular.
- Settlements must expand its role as a multi-functional destination for living/lifestyle, leisure, culture, food and drink, services and education.
- Short-term immediate initiatives are needed to encourage people to visit the city and town centres; particularly out-door food & beverage and street market offer.
- Pedestrian streets need to be made work where it is in operation before expanding. Expansive pedestrianisation is not considered essential to city centre retail.
- Streets need better identity as to their function and character. Independent operators have a significant role in developing the character and distinctiveness of the town centre offer.
- Clare retailer and business groups have a resilient outlook and have formed an effective and outward looking partnership that adapts to challenges and needs in proactive manner. Development of the partnership and improved relationship with the local authorities is vital going forward.
- Retailers and landlords should engage in preparing a simple 'Retail Charter' where established and new operators sign-up to qualities and standards.
- The evening and night-time economy need to be enhanced and improved
- Residential population growth is essential to town centre vibrancy and health.
- Conservation challenges – local authorities should be proactive in helping people invest in city centre properties (particularly historic) and bring in feasible measures and support to address fire regulations and conservation restrictions to support city centre living
- Ennis has received €4.04 m in URDF funding – a significant public investment that will facilitate placemaking
- Retail Parks were experiencing decline up to 2020, but in some cases the pandemic & associated lockdown have helped these operators via click and collect.

- Polycentric neighbourhoods where people live work and shop is not happening
- Prior to the pandemic & associated lockdown CSO data showed that retail expenditure in Ireland was growing quite healthily
- With low consumer spending over last year there is an increased chance of retail 'bounce-back'.
- When retail reopened after lockdown in 2020, a significant level of online sales immediately reverted to physical stores (based on Revolut data). It is considered that footfall was at 80% of normal levels. This reflects that the older generation stayed at home. It also reflects that there is a social and community aspect to shopping trips. This suggests trade can recover when lockdowns are lifted.
- The experiential aspect of physical retail (for comparison) remains very important for consumers.
- Retailing has become increasingly omni-channel
- Retailers that are localised can do well. Particularly those that adapted to new online and delivery channels.
- Ennis has a good catchment. The town centre has been protected and it is hard to get retail units. The core has been protected by the application of a strong sequential test.

5.3 County Clare

5.3.1 Ennis

5.3.1.1 Introduction

Ennis is one of the key tourist centres in the Mid-West region and is the largest town in Munster, with a population of 25,276 according to the 2016 census. Ennis is known for being a large market town and offers a number of atmospheric squares, a newly developed market area and easily accessible shopping. The town centre consists of narrow streets and laneways dating back to medieval times. This typical layout does not produce a regular grid of streets as the town's history has introduced its own character into the street form. The centre of the town has developed over time and is now a vibrant hub for retail, business and community activities. The thriving town provides services and facilities for both local residents and the wider region.

The core retail area within Ennis includes O'Connell Street, Parnell Street, High Street, Bank Place and Abbey Street. Within this retail core area multiple pedestrianised streets exist, most which are connected to Parnell Street. An additional core retail area exists along the eastern end of Francis Street adjacent to Cusack Park.



Figure 5-1: Ennis Streetscape (source planetennis.ie)

5.3.1.2 Attractions

As the most important retail and commercial centre within the County, Ennis has multiple attractors. The wide-ranging retail (convenience and comparison) and commercial offerings within the town centre ensure that it acts as the primary service centre for both locals and residents from surrounding towns and settlements. This reliable consumer base provides a strong foundation to the towns retail and commercial activities during business hours.

Tourism is a booming industry in Ennis acting as a large employer for many in the area and also the wider county. The picturesque town of Ennis contains a wide range of attractions, activities and a vibrant town centre. The town has a multitude of historical sites of interest such as the Old Ennis Friary, Clare Abbey and the Clare County Museum. Ennis and the surrounding area have an abundance of recreational activities on offer. Such activities include as golfing, cycling, equestrian sports, walking tours, parks, playgrounds and the Active Ennis Leisure Centre. There are also many accessible family-friendly amenities such as parks and playgrounds.

The evening and night-time economy is a further attraction to the town of Ennis, this having been recognised by being awarded Purple flag. Ennis was the first town in Ireland to achieve Purple Flag Accreditation and the town has since retained this accreditation. Ennis is recognised for its exceptional food offering that the town centre businesses take pride in.

Ennis is also home to several ecclesiastical buildings (including Cathedral of Saints Peter and Paul on Station Road/ O'Connell Street and Saint Columba's Church on Bindon Street) which serve as landmarks providing an important and pleasing contribution to the Ennis skyline at various vantage points throughout the town.



Figure 5-2: Cathedral of Saints Peter and Paul (Source Killaloe Diocese.ie)

5.3.1.3 Accessibility

Ennis is strategically located along the M18 which connects the town to Limerick City, Galway City and Shannon International Airport. Ennis is connected to Kilrush via the N68 and to Ennistymon via the N85. The intercity rail link connects Ennis to Limerick, Cork, Galway and Dublin and runs multiple times a day,

- Ennis – Limerick – Nine daily services
- Ennis – Galway – Five daily services except for four on Sunday
- Ennis – Dublin – Nine daily services, 10 on Sunday
- Ennis – Cork – Seven daily services, with nine on Sunday

Bus services provide alternative travel options than the private car to Limerick city and Galway city. There are several coach companies offering tours and a number of regular daily buses. Local link services connect Ennis to other smaller settlements within county Clare. The extensive Clare Local Link bus service coverage is shown below on Figure 5-3.

Within the town itself a single lane traffic management systems and pedestrianisation is common given the COVID-19 restrictions in place. The town's compact urban form and pedestrianised streets encourages sustainable modes of transport including walking and cycling. There are numerous car parks at various locations throughout the town. Large car parks exist along Frances Street which serve large convenience retail stores. There are low levels of on street car parking within the retail core as double yellow lines are a common sight, reflective of its medieval compact layout.



Figure 5-3: Local Link network in County Clare (Source Transport for Ireland)

5.3.1.4 Environmental Quality and Amenity

The streetscape and public realm are colourful and inviting with an abundance of well-maintained landscaping features including trees within the town centre, plants, flower beds, monuments and rest areas with benches. The town centre benefits from the presence of several focal point public realm areas which includes the fully pedestrianised streets of Parnell Street, Merchants Square, Barrett’s Lane and O’Halloran’s Lane, their maintenance and quality must continue to be safeguarded and enhanced where possible. The current public realm improvement works taking place at Parnell Street, High Street and over the various lands and bow ways greatly improves the appearance and experience for pedestrians in the area.

From a pedestrian perspective Ennis has an attractive and pleasant streetscape with the majority of shop fronts in the core retail area well presented with a mix of both contemporary and traditional style shopfronts. While the footpaths along Main Street are generally of adequate quality some signs of wear and tear were apparent on the day of the survey. However, overall, the town centre is very well maintained with litter bins provided throughout the town and no apparent problem with littering on the day of the survey.

5.3.1.5 Perception of Safety

On the day in which the health check was conducted Ennis had the feeling of a safe and secure town in which to conduct daily business-like shopping etc. The main streets are all well surveyed during daytime business hours. Improving the levels of occupancy within the town centre will further add to the perception of safety and surveillance in Ennis.

5.3.1.6 Diversity of Uses and Multiple Representation

The main shopping streets comprise Parnell Street, which is pedestrianised, O'Connell Street, High Street and Abbey Street which are all one way. A secondary retail area known as Ennis shopping Centre is located along Francis St, adjacent to Cusack Park. The core retail areas are primarily comparison with retailers including Eason, Pamela Scott, Pennys, Lifestyle Sports, Claires Accessories, Toymaster and Gamestop. In addition to this the town provides vibrant boutiques, some of which include Willow, Cornucopia, DV8, County Boutique, Ela Maria, Lily's Boutique, Mods & Minis, Club Dangan and Mannix.

Ennis has retail and service centres outside of the town centre. These include Quinn Road Business Park, Clonn Road Business Park, Doora Industrial Estate, Ballymaley Retail Park and Rosslevan Shopping Centre. The town is complemented by a range of convenience stores. Tesco, Dunnes Stores, Aldi, Lidl are the largest convenience stores within Ennis.

Table 5.1: Diversity of uses within Ennis

Ennis	No. of Units	Unit (%)
Bulky	0	0%
Comparison	142	81%
Convenience	33	19%
Grand Total	175	100%

Table 5.2: Overall retail vacancy within Ennis

Ennis	No. of Units	Unit (%)
Vacant Address	79	18%
Grand Total	450	100%

5.3.1.7 Levels of Vacancy

In consolidating the retail offering, appropriate planning policies should be adopted with a focus on increasing the potential for occupancy of vacant units within the study area.

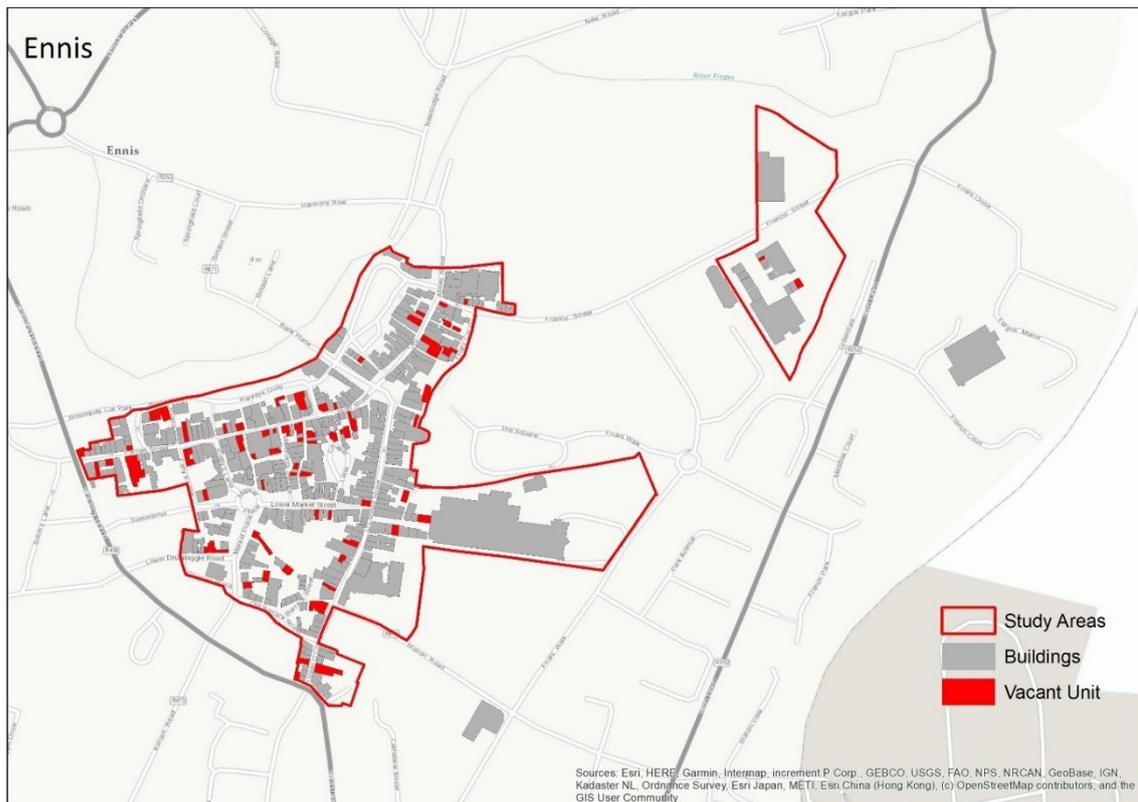


Figure 5-4: Vacant retail units in Ennis

5.3.1.8 Key Actions and recommendations

Ennis has a very well-functioning retail sector with a particularly strong offering and enviable reputation for comparison goods. Recommendations to further enhance the centres attractiveness and appeal as a retail destination are set out below:

- Consider adopting a ‘Shopfront Improvement Scheme’ Planning Guidance Note outlining; eligibility, grant funding, design principles criteria etc. to encourage use of the scheme.
- Consider introduction of a Business Incentive Scheme to encourage the use of vacant commercial premises within Ennis. This incentive scheme will seek to assist new commercial businesses to set up in the traditional retailing, commercial hubs of the town.
- Consider removing parking at the Parnell Streetcar park to harness the potential offered by the river setting to provide a unique amenity space
- Consider removing the car parking at Lysaght car park and introducing a civic apace in its place off Lower Market Street. This may increase the appeal for occupation of some of the vacant buildings in the vicinity of the car park site, including Chapel Lane.
- Review and reduce wirescape within the town centre (if possible) which currently serves to detract from the attractiveness of the core retail area.
- Adopt a pilot programme for the extension of opening hours to allow for late night shopping within the town centre. For the pilot project, this could be scheduled to take place alongside one of the town’s major festival/events.

- Encourage greater support for small independent retailers, launch a shop local initiative/pride of place initiative and a multi-channel media campaign (print and digital media) to promote independent retailers in Ennis. This could also include the establishment of a local retail voucher scheme to provide offers to incentivise consumers to buy locally.
- Support the Ennis Niche Destination Plan
- Seek to implement the Strategic Objectives and Guiding Principles set out in Ennis 2040 Economic and Spatial Strategy
- Support the work of the Ennis 2040 Development Activity Company, tasked with the delivery of projects arising from the Ennis 2040 strategy.
- Continue to support the established festivals and events that take place within the Ennis and consider opportunities for further events.
- Support the work and objectives of the Ennis Tidy Town’s team.

5.3.2 Kilrush

5.3.2.1 Introduction

Kilrush is an attractive tourist destination situated in west County Clare along the Atlantic coast. 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 town has a population of 2,719 and is linked to the nearby residential area of Cappa via R473. Kilrush attracts tourists which allows the town to support a wider range of comparison goods than would be justified by their local catchment population. Comparison retail is concentrated primarily around the Market Square and Henry Street with large Convenience retailers situated on Ennis Road and Frances Street.

5.3.2.2 Attractions

The town has several notable tourism sites that attract a high volume of visitors particularly during the summer months. Kilrush is a designated Heritage Town, one of only two in Co. Clare. Key tourist attractions are Vandaleure Walled Garden and Scattery Island. The Vandeleur Walled Gardens have recently received over €1.7 million in funding from the RRDF. This funding will,

“restore part of the historic Vandeleur Estate, which has been in existence since 1808. The project will respect the existing facilities and buildings within the surrounding area and will include a new museum; and development of arts and crafts facilities to promote local heritage.”²⁶

Scattery Island is visible across the estuary from Cappa and contains over 20 recorded monuments. Monuments recorded include Christian and Mediaeval churches, a walled enclosure, a round tower, a holy well, a castle and a graveyard. The island is no longer inhabited with the last inhabitants leaving in 1978. The island has remained, to date, free

²⁶ <https://clareppn.ie/clare-projects-benefit-from-e6-8m-announcement-rural-regeneration-development-fund/>

of modern development, which adds to its unique character and is accessible via a ferry service.

Another key attraction within the area is West Coast Aqua Park. This aqua park is suitable for families, groups and tours who visit the town. This is the largest inflatable water park in Ireland. The park is designed to suit all fitness levels. Additional attractions in the area include the Dolphin Discovery and the Museum of Irish Rural Life.

Kilrush is connected to other nearby settlements via national and regional roads. The N68 connects the town to Ennis and the N67 has created accessibility to a range of settlements along the west coast up to Galway city. The N67 extends down to the River Shannon to the Kilimer Ferry Terminal. This terminal provides a ferry service across the Shannon Estuary to the Tarbert Ferry terminal in north Kerry. The service provides enhanced access between Western Clare and Northern Kerry.

Bus Eireann connects Kilrush to other settlements within County Clare including Ennis, Kilkee and Doonbeg. The local link service route 337 launched on March 1st, 2021. This service aims to increase connectivity between Kilrush and Ennis and will strengthen the local link network within western Clare which provides an important service for many residents in the area.

The town centre contains ample car parking spaces. On street car parking is available throughout the town centre. A linear street side car park exists along Frances Street which acts as the main car park for Supervalu. Large car parks are located at the eastern side of the town along the N68 which serve the existing Tesco superstore and ALDI.

5.3.2.3 Environmental Quality and Amenity

The town centre benefits from the presence of several focal point public realm areas most notably the Market Square which is the location for the Kilrush farmer's market. This area of public realm acts as an important amenity spaces for users of the town and the maintenance and quality must continue to be safeguarded and enhanced where possible. The town centre has retained much of its original form along the main streets and is appealing to the pedestrian in both scale and use. High vacancy levels should be addressed to ensure Kilrush has an attractive and pleasant streetscape. The town appears to be relatively litter free with a number of bins in various locations provided throughout the town.

There are numerous ecclesiastical buildings throughout the town that add to the architectural character of Kilrush and provide some wonderful views vistas which contributes to the attractiveness and environmental quality of the town. St Seanan's Church on Toler Street and Teach Ceoil along Moore Street are notable examples.

5.3.2.4 Perception of Safety

Kilrush town centre is well observed during daytime business hours. As with all urban centres some secondary streets which do not have a strong retail presence have a reduced level of natural surveillance, however, this is as expected as you transition from the retail core towards streets which are predominately used for residential purposes.

5.3.2.5 Diversity of Uses and Multiple Representation

Retail provision in the town is concentrated on the Market Square area. The town centre provides an attractive shopping environment with a good range of comparison and

convenience retail outlets. The town has potential for redevelopment within the retail core as many opportunity sites have been identified for potential retail development. Kilrush has the potential to become a thriving retail centre due to its attractive tourist location and availability of unique boutique shops.

On the outskirts of Kilrush a large modern Tesco provides modern convenience shopping facilities to the north, the smaller Queally's Supervalu and Aldi are located closer and within the town centre.

Table 5.3: Diversity of uses within Kilrush

Kilrush	No. of Units	Unit (%)
Bulky	8	18%
Comparison	28	64%
Convenience	8	18%
Grand Total	44	100%

Table 5.4: Overall retail vacancy within Kilrush

Kilrush	No. of Units	Unit (%)
Vacant Address	75	16%
All Buildings	476	100%

5.3.2.6 *Levels of Vacancy*

The core retail area of Kilrush has a current commercial vacancy rate of 16%. Vacancy levels are high with all streets containing vacant units. This presents numerous opportunities for new retailers to gain a presence in a strategically positioned and prosperous town

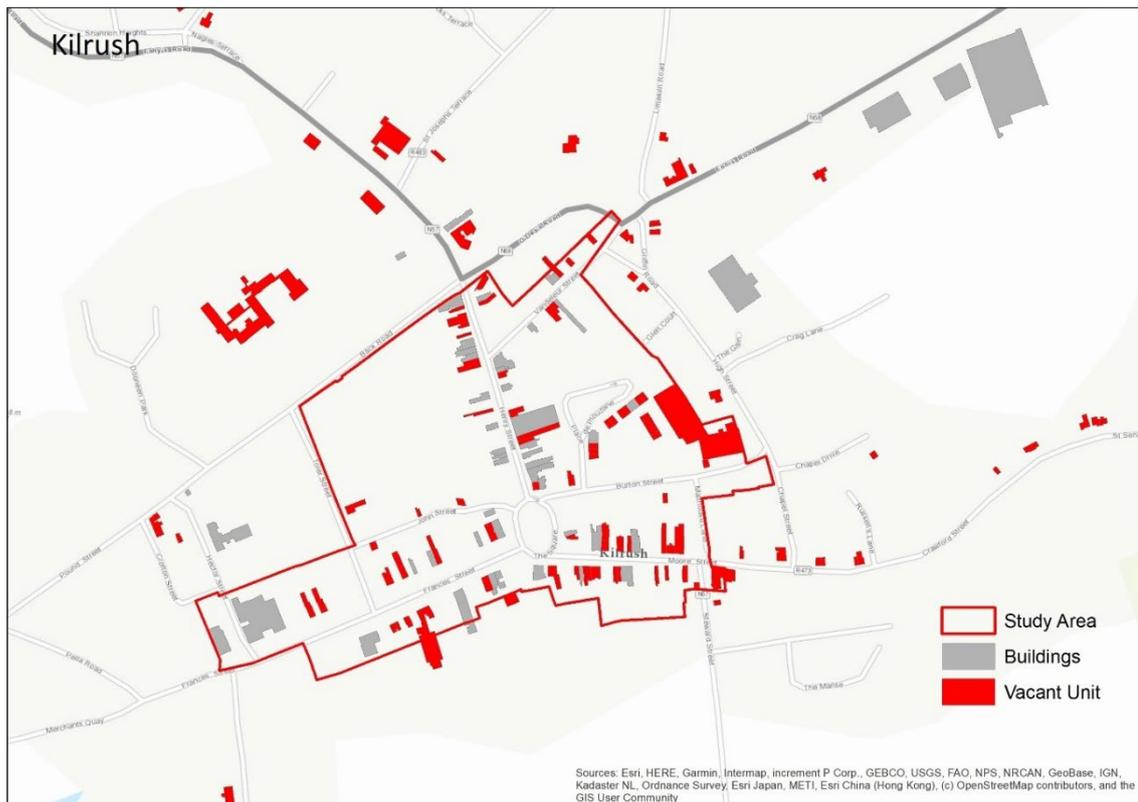


Figure 5-5: Kilrush Vacant Retail Units

5.3.2.7 Key Actions and recommendations

A series of measures are proposed to encourage additional trade within the retail core area and to improve the overall condition and environment of the town centre,

- Consider adopting a ‘Shopfront Improvement Scheme’ Planning Guidance Note outlining; eligibility, grant funding, design principles criteria etc. to encourage use of the scheme.
- Consider introduction of a Business Incentive Scheme to encourage the use of vacant commercial premises within Kilrush. This incentive scheme will seek to assist new commercial businesses to set up in the traditional retailing, commercial hubs of the town.
- Encourage redevelopment of the parade of units which front onto Market Square from the north to complement and establish the attractive public square again.
- Consider implementation of traffic calming measures along Frances Street.
- Encourage the provision of a hotel or other visitor accommodation within Kilrush.
- Establish a marketing and social media campaign to promote the area as a tourism, community and enterprise location of choice.
- Encourage greater support for small independent retailers, launch a shop local initiative/pride of place initiative and a multi-channel media campaign (print and digital media) to promote independent retailers in Kilrush.

- Consider Implementation of traffic calming measures along Main Street as visibility between parked cars and moving vehicles is reduced in proximity to the existing zebra crossings.
- Support and ensure the retention of the Tourist Office within the town. Continue to circulate literature outlining the extents of the local walking routes and trails to encourage visitors to the town and surrounding area.
- Consider removing parking along Frances Street to replace with seating/green infrastructure/public art/additional bins in order to enhance the public realm
- Support the work and objectives of the Kilrush Tidy Town’s team.
- Support the Kilrush Town Team across their various interest groups
- Support the delivery of the Marine Training College in Kilrush Town, which will contribute to the retail demand within the town.
- Support the DigiClare Hub within the town and the expansion of this resource into the future.

5.3.3 Shannon

5.3.3.1 Introduction

Shannon is the second largest town in County Clare with a population of 9,729 according to the 2016 census. The town is located on the River Shannon, which forms part of the southern boundary of County. Shannon Town developed from the 1960s in response to the growth of Shannon International Airport and the Shannon Free Zone. The town has strong accessibility links to the Gateway cities of Limerick, Cork and Galway and is approximately midway between Limerick and Ennis, the two largest shopping destinations in the mid-west region.

5.3.3.2 Attractions

Shannon has the potential for enhanced tourism given its attractive location along the Atlantic corridor and accessibility to Shannon International Airport. The Atlantic Air Adventures centre is a popular tourist attraction in the town which is an aviation education and flight simulation visitor centre. It includes a wide range of packages including family days out, school excursions and tours, as well as facilitating individual visitors, birthday parties, corporate events and providing flight simulator training, field trips and aviation displays. The centre also provides aircraft technical services training in conjunction with Limerick Institute of Technology.

Other attractions in the area include Bunratty Castle and Folk Park and the associated retail offering in the village, Ballycasey Craft & Design Centre, Shannon Golf Club and the new Omniplex cinema which is located at the Shannon Town Centre .

5.3.3.3 Accessibility

The road network serving Shannon comprises the N19 and N18 National Primary Routes that connects the town to Limerick City, Ennis and to Galway City. The regional R471 connects Shannon to Sixmilebridge. The Limerick Tunnel has enhanced accessibility between Shannon and Limerick City since its opening in 2010. This tunnel is manned by a toll bridge.

There are good quality public transport bus linkages connecting the town to major urban centres and to local in-County destinations. Bus Éireann provide a local bus with two routes serving Shannon. Bus Éireann run the highest frequency direct services to & from Shannon International Airport with over 130 services passing through the airport everyday. These routes provide direct access to the settlements of Limerick, Cork, Galway, and Ennis. The Local link bus services connect Shannon to the settlements of Ennis, Scariff, Clarecastle, Newmarket On Fergus, Feakle, Bodyke, Sixmilebridge, Tuamagraney and Broadford.

There is ample parking within Shannon town centre. Parking is concentrated around the Shannon Town Centre which contains a multi-storey car park. Car parking is also available within the Elite Business park.

Shannon International Airport is the third busiest in Ireland and recorded passenger number of 3.6 million at its peak. The airport provides a gateway to Shannon and the west of Ireland. The airport provides many international routes with the most popular routes in Europe and north America. The airport has a history of pioneering in global aviation with the first transatlantic flight in 1945 and also contained the worlds first duty free store. Shannon International Airport also contains a large car park with over 5000 spaces, has multiple bus Eireann links and car hire is available.



Figure 5-6: Shannon Airport (Source Clare FM)

Footfall data was not available due to government lockdown restrictions on the normal operation of retail during the study period.

5.3.3.4 Environmental Quality and Amenity

The environmental quality of Shannon is influenced by attractive open spaces and landscaping. Examples of positive aspects of environmental quality include the Town Centre Woodland Area and the Shannon Estuary. The woodland area is an important space and forms part of a circulation route, linking the town centre with the school and leisure centre, and also the Shannon Estuary via the wetlands area. The site now supports a significant woodland resource of mature deciduous trees. The Shannon

Estuary provides important habitat for overwintering wildfowl and waders. Other habitats include, estuaries, lagoons, salicornia and other annuals colonising mud and sand, Atlantic salt meadows, and Mediterranean salt meadows.

Other important amenity spaces include Shannon Town Park, Shannon Allotments and lands in the vicinity of Hastings Cottage, Drumgeely Hill and the open space / wooded area west of Cluain Airne. There are some community facilities within Shannon including Shannon Town United AFC Camogie Club, Athletics Club, St. Senan’s Rugby Football Club, Aras Wolfe Tones na Sionna GAA, the Shannon Model Flying Club and soccer pitches.

5.3.3.5 Perception of Safety

On the day in which the health check was conducted Shannon appeared to offer a good experience and secure town environment. The main shopping district had a high level of surveillance which diminished somewhat away from the town centre.

5.3.3.6 Diversity of Uses and Multiple Representation

Shannon Town Centre shopping centre is the core retail district within Shannon town. It is primarily a comparison shopping destination with a relatively extensive range of comparison shops. The shopping centre is anchored by a large Dunnes Stores which acts as a main food shopping destination and also sells a widespread range of clothing. A Lidl supermarket is situated in the Town Centre shopping area. In addition to shopping, the centre provides banking facilities, a library, a post office and restaurants.

Opportunities exist for redevelopment of the existing town centre. Providing additional retail development can enhance the quantity and quality of retail on offer. Clare County Council is set to produce a Masterplan for the town centre, looking at the rejuvenation and expansion of services within a compact site area.

Table 5.5: Diversity of uses within Shannon

Shannon Town Centre	No. of Units	Unit (%)
Bulky	1	5%
Comparison	13	68%
Convenience	5	26%
Grand Total	19	100%

Table 5.6: Overall retail vacancy within Shannon

Shannon Town Centre	No. of Units	Unit (%)
Vacant Address	17	34%
All Units	50	100%

5.3.3.7 Levels of Vacancy

The Shannon Town Centre reported high levels of vacancy. Overall, there were 17 vacant units recorded within the shopping centre. Some corridors within the shopping centre were predominantly vacant with other shops boarded up and covered in artwork. This suggests that they have been vacant for a considerable amount of time. As seen in Figure 5-7, the initial desktop assessment of Shannon Study Area did not allow the distinction and identification of individual vacant units. Vacancy was subsequently confirmed through physical site inspections.

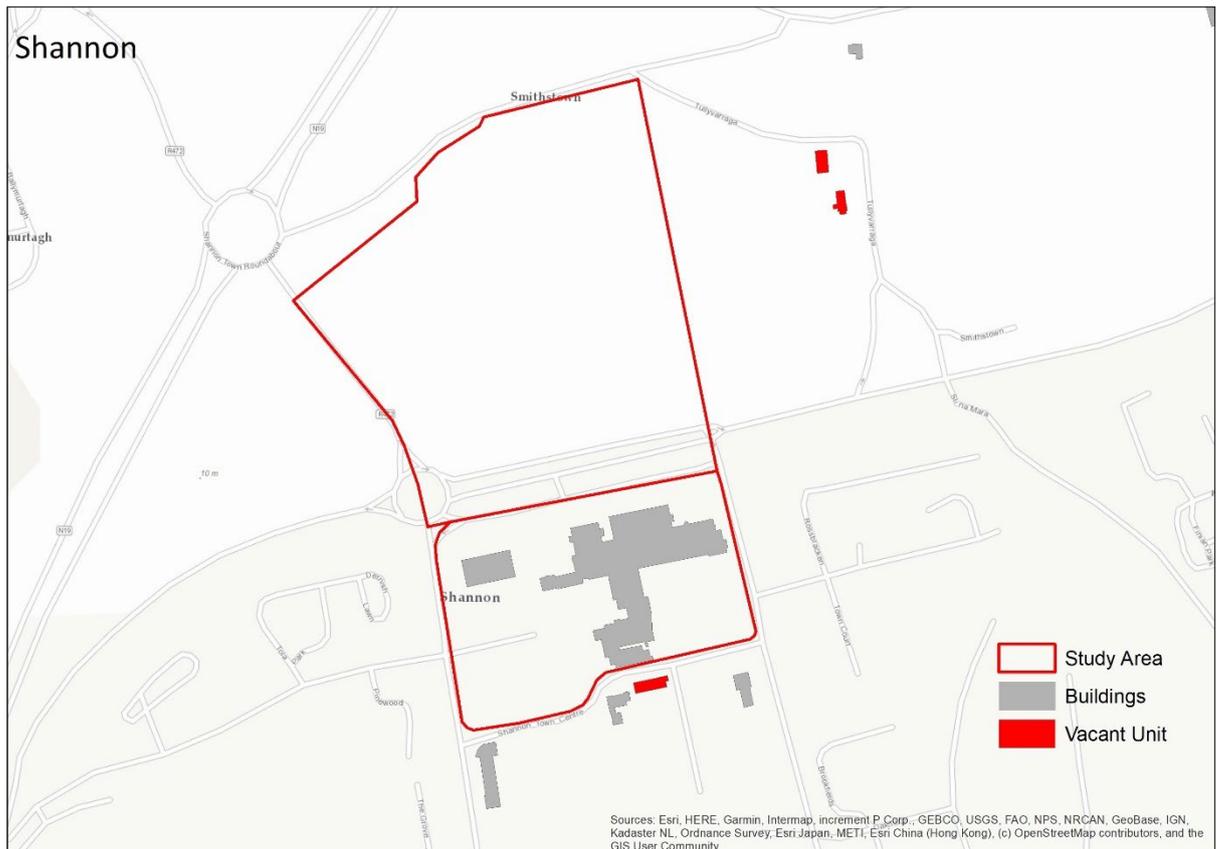


Figure 5-7: Vacant retail units in Shannon

5.3.3.8 Key Actions and recommendations

Shannon has a unique town centre which currently has high vacancy levels. In order to consolidate the town centre a series of measures are proposed,

- Maintain the vitality and viability of the Shannon Town Centre by consolidating investment in the shopping centre
- Support the delivery of retail opportunities focused on meeting the needs of the tourism sector in Shannon Town and also Bunnratty village.
- Encourage and facilitate the reuse of vacant units/sites throughout the town and shopping centre
- Support the delivery of the Shannon Town Centre Masterplan to create a strengthened viable and vibrant town centre supporting a quality, varied retail offer

with improved physical appearance, connectivity and the development of a 'streetscape'.

- Support the planned N19 upgrade which will improve connectivity to Shannon International Airport
- Support the delivery of the objectives for Shannon set out in the Limerick-Shannon Metropolitan Area Transport Strategy
- Support the work of the Shannon Chamber of Commerce
- To work with key stakeholders within the Shannon area including Shannon Commercial Properties and Shannon International Airport to deliver on the ambitions for Shannon as set out in this Draft Clare County Development Plan 2023-2029
- Build upon and enhance the existing tourism offering within Shannon and Bunratty and encourage the delivery of tourist and visitor-orientated retail provision to capitalise on the central role that these two settlements play in the tourism industry in the County.

5.3.4 Ennistymon

5.3.4.1 Introduction

Ennistymon is located in North Clare and has a population of 1,045. Ennistymon is situated close to Lahinch. The two settlements are approximately 2.5 km apart and are linked by the N67, a footpath and cycleway. Ennistymon is the largest town in North Clare and has a particularly strong urban core, however areas are in need of consolidation and renovation. Its locational benefits are enhanced by its proximity to the seaside with popular beaches nearby. These natural landscape features and locational benefits all add to the vitality currently experienced within the town.

5.3.4.2 Attractions

As the largest town in north Clare, Ennistymon has multiple attractions. The town has a good retail and commercial offering within the town centre which ensures that it acts as the primary service centre for both locals and residents from surrounding towns and settlements. This reliable consumer base provides a strong foundation to the towns retail and commercial activities during business hours. Ennistymon is closely linked to Lahinch which provides additional retail services. The town centre accommodates pubs, restaurants, take away outlets and the Falls Hotel.

The town is situated close to the Atlantic ocean and is connected to Lahinch. This town is less than a five-minute drive from Ennistymon and is a popular, well-established seaside resort situated on the picturesque Liscannor Bay. Famous for its long sandy beach and championship links golf course, Lahinch also has excellent water for water sports and activities including surfing and sea kayaking which attracts many tourists to the area. The surrounding area has a host of attractions with the Cliffs of Moher and The Burren Centre only a 10 minute drive from the town.

Ennistymon is also home to several ecclesiastical buildings (including St Andrews Church and Our Lady St & Michaels Church) which serve as landmarks providing an important and pleasing contribution to the Ennistymon skyline at various vantage points throughout the town.

5.3.4.3 Accessibility

The town is linked to numerous settlements along the N67. This national road connects Ennistymon to the settlements of Kilrush, Kilkee, Doonbeg, Quilty, Miltown Malbay, Lahinch, Lisdoonvarna, Ballyvaughan, Kinvarra, Oranmore and Galway City. The N85 links Ennistymon directly to Ennis.

Bus Eireann provides a service to Ennistymon. This route is from Ennis to Galway City which connects the town to a number of settlements throughout Clare. The Local Link bus service provides additional links on top of the Bus Eireann route. This service provides one route via Ennistymon which runs from Corofin to Lisdoonvarna every Tuesday. The town provides on street car parking along the primary streets. Large car parks exist which support the large retail convenience stores within the town settlement.

5.3.4.4 Environmental Quality and Amenity

The town has elevated historic areas which are excellent viewing points for viewing the town and the surrounding countryside. The River Inagh runs over ridge rocks which has resulted in the stunning cascades.

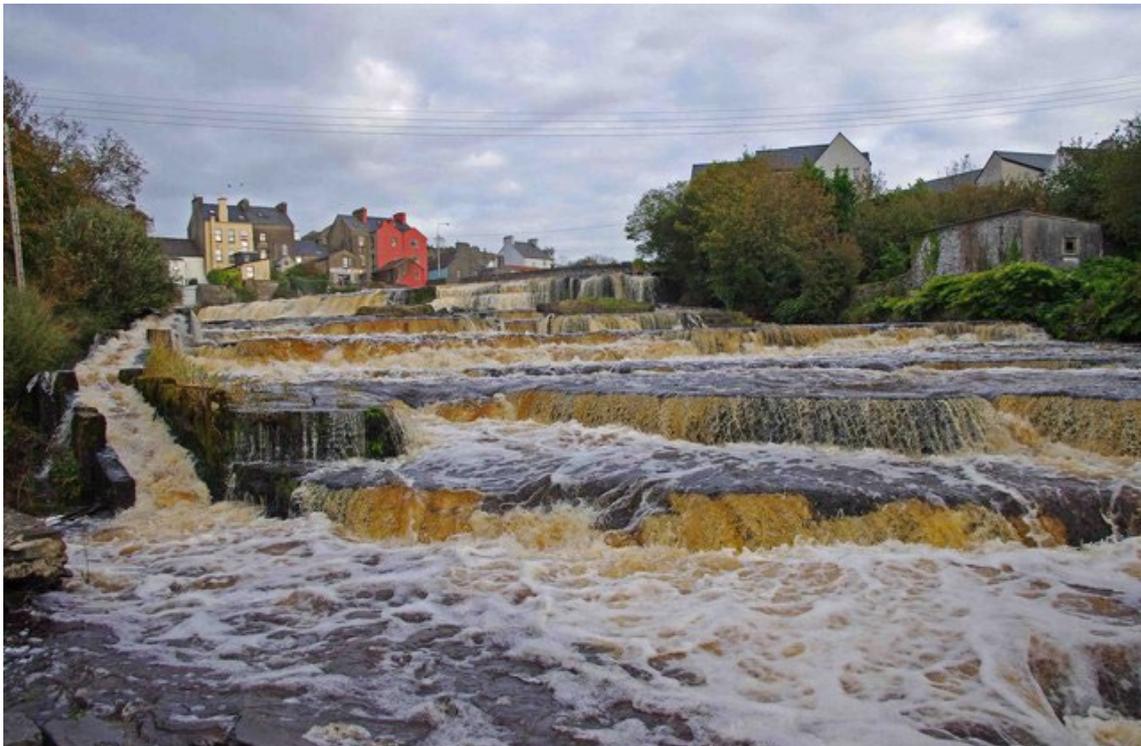


Figure 5-8: The cascades in Ennistymon (Source Geograph Ireland)

From a pedestrian perspective Ennistymon has an attractive and pleasant streetscape with the majority of shop fronts in the core retail area well presented with a mix of both contemporary and traditional style Shopfronts. The town centre has retained much of its original form along Main Street and is appealing to the pedestrian in both scale and use. As previously discussed, the prominence of ecclesiastical buildings throughout the town also serves to add to the architectural character of Ennistymon and provide some wonderful views vistas which contributes to the attractiveness and environmental quality of the town.

Overall, on the day of the survey, Ennistymon appeared to be relatively litter free with a number of compaction bins in various locations provided throughout the town.

5.3.4.5 Perception of Safety

On the day in which the health check was conducted Ennistymon felt like a safe environment in which to navigate. The main streets and the various streets which offshoot these all well surveyed during daytime business hours.

5.3.4.6 Diversity of Uses and Multiple Representation

Ennistymon is a local service centre but with some additional tourist retailing. The town has two large convenience stores Aldi and Supervalu which both provide a modern main food shopping destination, with ample external and basement parking. The town centre provides a good range of comparison retail and other services.

Table 5.7: Diversity of uses within Ennistymon

Ennistymon	No. of Units	Unit (%)
Bulky	2	9%
Comparison	12	55%
Convenience	8	36%
Total	22	100%

Table 5.8: Overall Vacancy within Ennistymon

Ennistymon	No. of Units	Unit (%)
Vacant Address	29	11%
All Units	266	100%

5.3.4.7 Levels of Vacancy

High levels of vacancy were recoded within the town centre study area, along Church Street. The vacancy rate in Ennistymon is 11%. The existing stock within the town centre provides ample opportunities for new retailers to set up in Ennistymon.

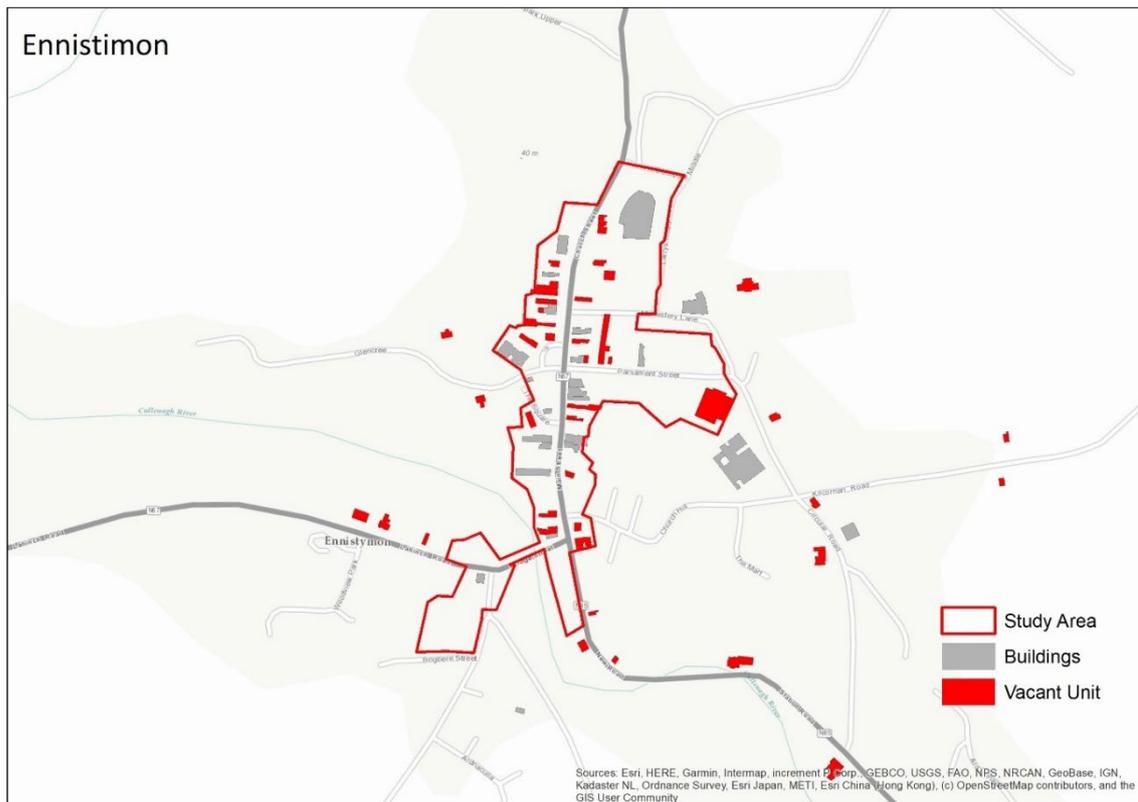


Figure 5-9: Vacant units in Ennistimon

5.3.4.8 Key Actions and recommendations

Ennistimon has a very well-functioning retail sector with a good offering and enviable reputation for comparison goods. The town is also a walkable and has a pleasant and well-maintained public realm. Recommendations to further enhance Ennistimon’s attractiveness and appeal as a retail destination are set out below:

- Consider adopting a ‘Shopfront Improvement Scheme’ Planning Guidance Note outlining; eligibility, grant funding, design principles criteria etc. to encourage use of the scheme and tackle vacancy within Ennistimon.
- Consider providing a pedestrian priority crossing at the southern end of the Main Street to enhance accessibility and safety
- Consider introduction of a Business Incentive Scheme to encourage the use of vacant commercial premises within Ennistimon. This incentive scheme will seek to assist new commercial businesses to set up in the traditional retailing, commercial hubs of the town.
- Encourage greater support for small independent retailers, launch a shop local initiative/pride of place initiative and a multi-channel media campaign (print and digital media) to promote independent retailers in New Ross. This could also include the establishment of a local retail voucher scheme to provide offers to incentivise consumers to buy locally.
- Review and reduce wirescape within the town centre (if possible) which currently serves to detract from the attractiveness of the core retail area.

- Consider the use of events and popup markets (at the square which is boarded by Church Street and Sráid an Teampaill) to generate a buzz around the town centre.
- Support the delivery of the planned West Clare Railway Greenway which will pass through Ennistymon and onto Lahinch
- Support the Ennistymon Town Team
- Support the delivery of the Ennistymon Town Master plan which will identify public realm opportunities within the town that can be utilised to enhance the towns offering.
- Support the delivery of the planned new River Crossing which will help to address traffic congestion within the town especially at peak travel times and during the peak tourist season.

5.3.5 Scariff

5.3.5.1 Introduction

Scariff/Tuamgraney is connected via the R352 and is identified as a service town in the current retail hierarchy. Scariff/Tuamgraney is located in attractive surroundings, on the footsteps of picturesque Lough Derg. The settlements are served by a good quality road network, with links to Ennis, Shannon, Killaloe and Limerick. The distance between the two urban settlements is decreasing due to the linear developments along the R352. The core of Tuamgraney village is marked by an attractive area of public realm known as the East Clare Memorial Park at the junction of the R352 and the R463.

5.3.5.2 Attractions

Scariff serves a wide catchment area as a service centre which acts as its primary attractor. In that regard it serves a very important function, accommodating the needs of a large surrounding rural hinterland.

Outside of facilitating the everyday retail and commercial needs of the residents within the village and surrounding area Scariff sits in attractive settings on the edge of Lough Derg. The Lough offers opportunities for many activities including water sports such as canoeing, sailing and wind surfing. Lough Derg is ideal for fishing and is utilised by many locals.

5.3.5.3 Accessibility

Scariff is connected to other nearby settlements via regional and local roads. The town is connected to Limerick City via the R352/R465/R463. The R352 links Scariff to Ennis. Other accessible settlements include Feakle (R461) and Killaloe (R463).

In terms of public transport Bus Eireann and The Local Link operate frequent services to surrounding towns and villages and to key destinations such as Limerick City, Killaloe and Ennis. Car parking provision within the town centre comprises a mix of on street parking and one surface car park located at Market Square, adjacent to Centra.

5.3.5.4 *Environmental Quality and Amenity*

The streetscape and public realm are colourful and inviting with moderate levels of vacancy and an abundance of well-maintained landscaping features including trees, plants, flower beds and rest areas with seating.

The prominent community council building on Main Street is noted for its architectural heritage. This building was constructed between 1850-1860 and was originally in use as a weighbridge/weighhouse. This freestanding former market weigh house is constructed out of sandstone and is finished with a hipped artificial slate roof.



Figure 5-10: Scariff Weighhouse/Weighbridge (Source National Inventory of Architectural Heritage)

While the footpaths along Main Street are generally of adequate quality some signs of wear and tear were apparent on the day of the survey. The roads within the town centre had a lack of road markings with resurfacing needed in some areas. However, overall, the town centre is very well maintained with litter bins provided throughout the town and no apparent problem with littering on the day of the survey.

5.3.5.5 *Perception of Safety*

On the day in which the health check was conducted Scariff had the feeling of a safe and secure town in which to conduct daily business-like shopping. The main one way street and town centre are all well surveyed during daytime business hours. Reduction of vacant sites would also add to the sense of security within the town centre streets.

5.3.5.6 *Diversity of Uses and Multiple Representation*

Scariff provides a range of local services which supports the needs of its catchment population. The town possesses a range of administrative, service, social and community

facilities. Scariff has seen an increase in development in recent years which includes new civic offices, public library, a fire station and community playground. It has a good range of small scale convenience provision supported by a range of personal and medical services, bars, restaurants, and local professional services. The centre however only has a very limited range of comparison shopping outlets, which results in leakage to other nearby settlements. No bulky comparison retail units were observed within the town of Scariff. Tuamgraney has an undersupply of retail facilities. Village residents need to visit Scariff or Killaloe to fulfil their retail needs.

Table 5.9: Diversity of uses within Scariff

Scariff	No. of Units	Unit (%)
Bulky	0	0%
Comparison	6	50%
Vacant	6	50%
Total	12	100%

Table 5.10: Overall retail vacancy within Scariff

Scariff	No. of Units	Unit (%)
Vacant Address	14	9%
All Units	156	100%

5.3.5.7 *Levels of Vacancy*

Scariff has an overall vacancy rate of 9%. In consolidating the retail offering, appropriate planning policies should be adopted with a focus on increasing the potential for occupancy of vacant units within the town centre.

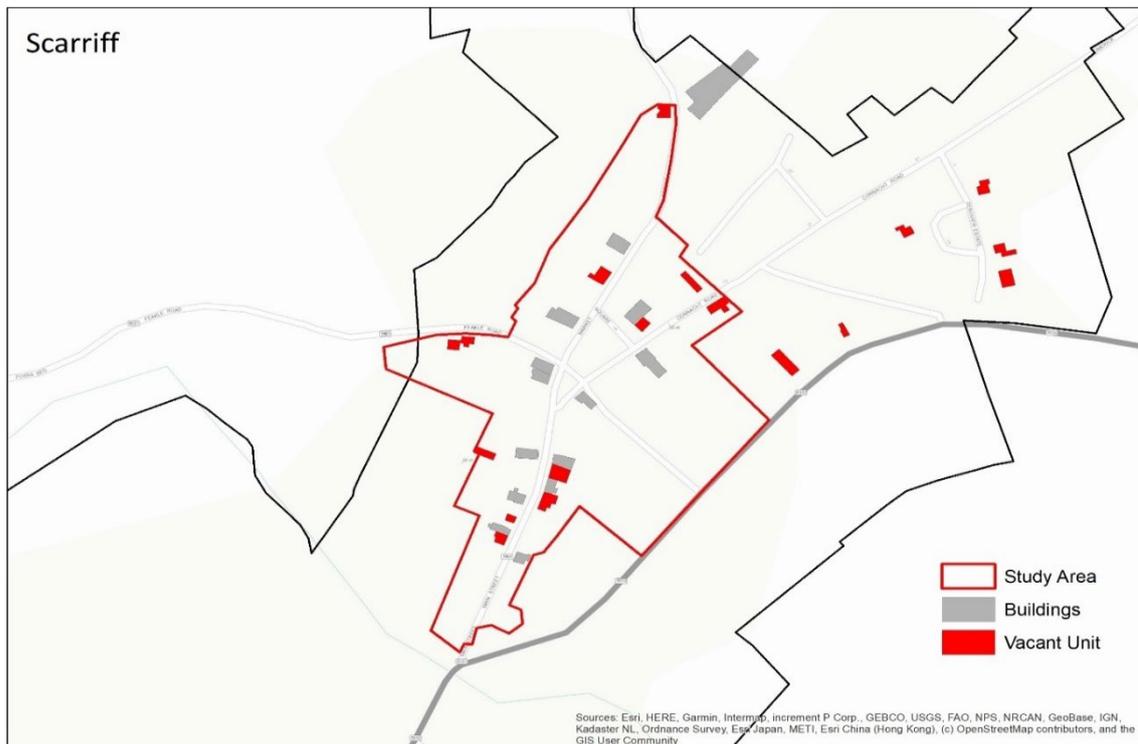


Figure 5-11: Scariff Vacant units

5.3.5.8 Key Actions and recommendations

Scariff has a very attractive natural setting, architectural heritage and a rich historical background. However, as a modern retail centre there are areas that Scariff can improve on to enhance the vitality and viability of the town centre and increase its competitiveness with other retail destinations,

- Consider adopting a ‘Shopfront Improvement Scheme’ Planning Guidance Note outlining; eligibility, grant funding, design principles criteria etc. to encourage use of the scheme.
- Invest and improve the public realm (new attractive hard and soft landscaping/paving, road markings and public benches) along Main Street to increase the appeal of utilising this approach to the town centre which can aid in supporting the established retailers located on this street.
- Review and reduce wirescape within the town centre where possible, which currently weakens the attractiveness of the core retail area.
- Encourage greater support for small independent retailers, launch a shop local initiative/pride of place initiative and a multi-channel media campaign (print and digital media) to promote independent retailers in Scariff. This could also include the establishment of a local retail voucher scheme to provide offers to incentivise consumers to buy locally.
- Encourage the provision of a hotel or other visitor accommodation within Scariff to support the annual Scariff Harbour Festival.
- Support the work and objectives of the Scariff’s Tidy Town’s team.
- Support Scariff Town Team

6 Projected Retail Floorspace Requirements

6.1 Introduction

This section provides an overview of the quantitative assessment of retail floorspace in the study areas, to model for likely future floorspace requirements across County Clare for the period of the plan (2023-2029). The assessment takes account of emerging trends in the retail market (as discussed in Section 3), estimates of future demand, projected changes in the population, consumer spending, existing turnover generation and the capacity for future floorspace potential.

The assessment of retail floorspace is carried out for the three retail types of interest – 1) Convenience, 2) Comparison Non-Bulky (referred to as ‘comparison’), and 3) Comparison Bulky (referred to as ‘bulky’). The base year of the assessment is set at 2021, unless otherwise stated, with figures rounded to the nearest whole number where relevant. The estimated future retail floorspace potential is derived for the retail catchment areas of County Clare, and the aggregate sum of these is also provided for a County-total of same. Special provision has been made for the “Limerick Catchment Area” as it extends north of the Limerick City MASP into County Clare. The assessment of population, expenditure, retail floorspace and other inputs used in the determination of future floorspace requirements is based on the catchment as a whole (with a majority portion of the catchment area in County Limerick, and the extension into County Clare).

The future estimated floorspace requirements as calculated through the modelling process are only intended to provide broad guidelines on the allocation of additional floorspace to the existing footprint of convenience, comparison and bulky floorspace in each County. Therefore, these figures should not be interpreted as overly prescriptive or serve to inhibit competition – as stated in the requirements of the Retail Planning Guidelines (2012).

This section will set out the modelling steps undertaken in the identification of future floorspace requirements, and will set out these requirements unadjusted for vacancy, adjusted for vacant floorspace utilisation and finally, adjusted for both vacancy and utilisation of the consented planning pipeline.

6.1.1 Methodological Approach

The following approach describes the step by step methodology used in the assessment of existing and future retail floorspace capacity across the County catchment areas:

Step 1: Establish catchment areas of assessment and utilise the agreed population forecasts in base, period and design years;

Step 2: Estimate the available expenditure per capita for each of the retail categories (convenience, comparison and bulky goods) at the base year and design year;

Step 3: Compile a projection of the total available expenditure in the base year and design year for residents to allow for assumed expenditure inflows and outflows;

Step 4: Undertake a projection of the anticipated change in available expenditure (accounting for identified inflows and outflows) which will support the provision of additional floorspace;

Step 5: Estimate the indicative turnover of existing floorspace in convenience, comparison and bulky goods;

Step 6: Estimate the representative turnover of existing floorspace in convenience, comparison and bulky goods;

Step 7: Compile a breakdown of vacant floorspace and estimate the assumed retail allocation;

Step 8: Derive the residual surplus or shortfall between adjusted available expenditure and assumed future turnover;

Step 9: Summarise the capacity potential for additional floorspace across each of the three retail categories, and account for a vacancy.

6.1.2 Defining Study and Catchment Areas

For the purpose of this assessment County Clare has been subdivided into the following retail catchment areas:

- County Clare
 - Ennis Catchment
 - Kilrush Catchment
 - Ennistymon Catchment
 - Scariff
 - Limerick Catchment (including the Limerick-Shannon Metropolitan Area and overlap of the catchment into County Clare)

The catchment areas have been defined using an assessment of driving time accessibility extending outwards from the key towns in each of the catchment areas.

Multiple time-thresholds were used in the assessment of catchment areas, after which the 20-minute threshold was selected as the best suited delineator as it minimises overlaps, while also maximising population reach within an accessible time period.

The driving time accessibility assessment also considers factors such as geography and existing road network and hierarchy in the determination of reach. The following figure shows the drive time accessibility from the key towns in the catchment areas.

The Limerick Catchment area is modelled as an aggregate area, and later apportioned to solely County Clare using agreed rates decided by both Local Authorities (see section 6.16 for final future floorspace potential).

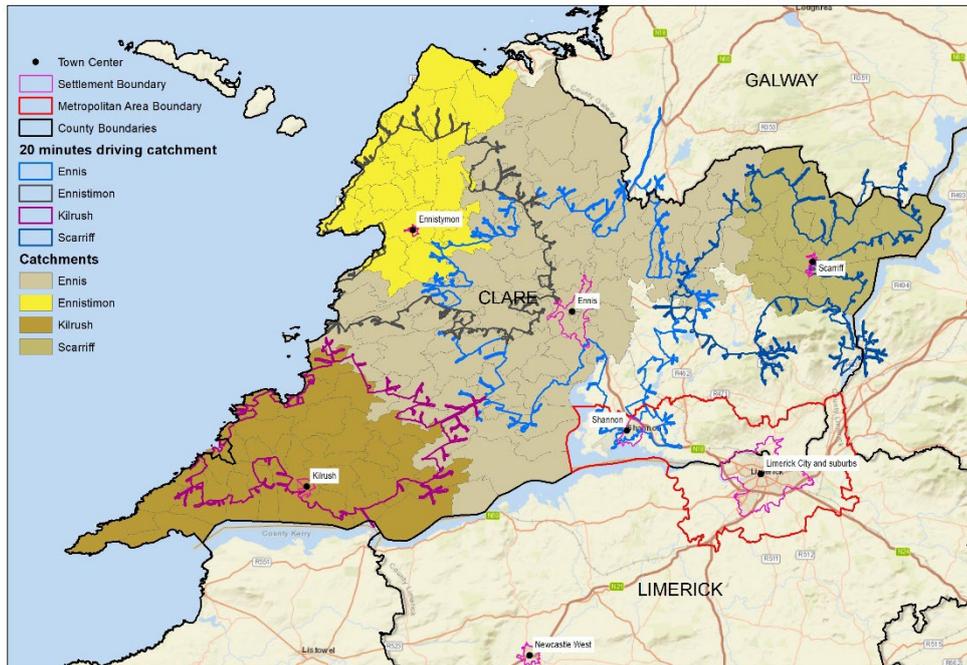


Figure 6-1: 20-minute drive time reach from Key Towns in Catchment Areas

In order to better define the catchment areas, an electoral division (ED) level assessment was undertaken using a ‘best-fit approach’ to assign EDs to each catchment area, forming the basis of population calculations. The following map provides an overview of the catchment areas in each County at ED level allocation.

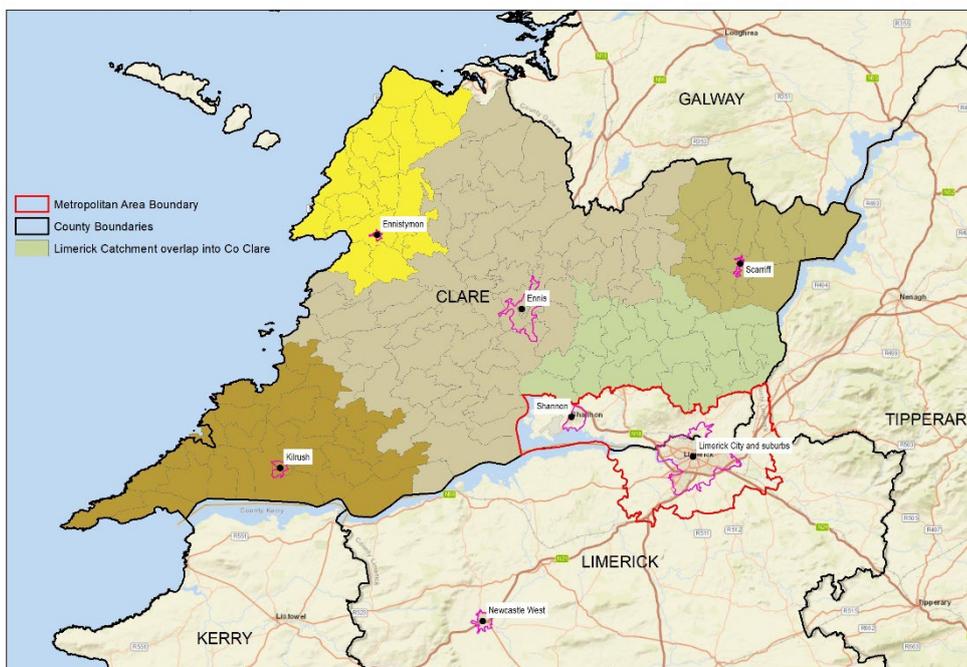


Figure 6-2: Retail Study Catchment Areas

Within each catchment area, certain areas of interest were delineated as retail study areas. These study areas include areas with an existing retail nodal presence, whether in the form of shopping centre or other high street shopping facilities (see maps in Appendix A.1). In addition to the delineated study areas, consideration was given to other retail facilities outside of the retail nodes that still have an influence on the retail environment and dynamic within each catchment area. These retail facilities were included in the floorspace modelling in addition to the retail facilities identified within the study areas.

6.2 Population

The catchment populations for the period of the plan were calculated with respect to settlement-level allocations of growth developed by Clare County Council, CSO Census data of 2016, 2026 NPF alignment, and finally 2029 Core Strategy alignment.

6.2.1 Clare Catchments Population

The population figures for each of the County Clare catchment areas include a multitude of CSO settlement areas and other settlement areas categorised as 'rural'. The Census 2016 settlement population for the areas were totalled and compared to the 2029 targeted population for settlements as set out by the Core Strategy. An assessment of these urban areas, alongside remainder rural areas was undertaken for each identified retail catchment area. A linear population interpolation was used to calculate the annual population totals for each year from 2016 to 2029, and specifically for the period of the plan from 2023-2029. Consideration was given to the portion of the Limerick Catchment that overlaps into County Clare. This area's population was co-developed with Limerick City and County Council.

The following table provides a breakdown of the population for the catchment areas in County Clare, including the Limerick Catchment area.

Table 6.1: Catchment Population Projections

Population in each Catchment Area				
Year	Census	Retail Catchment Area Population (inclusive of named towns)		
	2016	2023	2026	2029
Ennis Catchment				
Population	51,226	55,129	56,802	58,277
Change # from 2016	-	3,903	5,576	7,051
Change % from 2016	-	7.6%	10.9%	13.8%
Kilrush Catchment				
Population	12,014	12,845	13,201	13,488
Change # from 2016	-	831	1,187	1,474
Change % from 2016	-	6.9%	9.9%	12.3%

Ennistymon Catchment				
Population	8,974	9,588	9,851	10,064
Change # from 2016	-	614	175	1,090
Change % from 2016	-	6.8%	1.8%	12.1%
Scariff Catchment				
Population	5,046	5,371	5,510	5,617
Change # from 2016	-	325	93	571
Change % from 2016	-	6.4%	1.7%	11.3%
Limerick Catchment				
Population	209,413	238,846	251,461	263,920
Change # from 2016	-	29,433	8,410	54,507
Change % from 2016	-	14.1%	3.5%	26.0%

6.3 Expenditure Estimates

To determine the available expenditure for each catchment area, the CSO Annual Services Inquiry (ASI) is consulted to review the published expenditure per capita data at County level. As of the preparation date of this assessment, the latest ASI figures were published in February 2021 and reflect a distilled view of national account data to 2018. The data published provides gross estimates of expenditure in each of the relevant retail sectors (as set out in the Retail Planning Guidelines) in the principal trading aggregates at national level. The following table shows the selected turnover aggregates related to the retail sectors specifically categorised as convenience, comparison, or bulky goods at State level²⁷.

Table 6.2: Determination of State Level Convenience and Comparison Retail Sales Turnovers

(State) Determination of Convenience and Comparison Retail Sales Turnover			
Retail Goods (State: 2018 Latest Year)	Turnover Excl. VAT (€'000) - 2018	VAT on Turnover (€'000) - 2018	Turnover Incl. VAT (€'000) - 2018
Convenience Goods			
Convenience Goods Sales in Non-Specialised Stores	€15,633,106	€2,642,708	€18,275,814
Convenience Goods Sales in Specialised Stores	€1,767,221	€403,922	€2,171,143
Retail sale via stalls and markets	€59,241	€8,130	€67,371
Total of Convenience Goods	€17,459,568	€3,054,760	€20,514,328

²⁷ A splitting of retail sales in non-specialised stores between convenience and comparison has been incorporated on the basis of an 85:15 split towards convenience. This was informed by further specific breakdowns of retail sales by the CSO, isolating Department Stores from convenience sales.

(State) Determination of Convenience and Comparison Retail Sales Turnover			
Retail Goods (State: 2018 Latest Year)	Turnover Excl. VAT (€'000) - 2018	VAT on Turnover (€'000) - 2018	Turnover Incl. VAT (€'000) - 2018
Comparison Goods			
Comparison Goods Sales in Non-Specialised Stores	€1,737,012	€293,634	€2,030,646
Comparison Goods Sales in Specialised Stores	€17,142,417	€4,123,024	€21,265,441
Retail sale via stalls and markets	€59,241	€8,130	€67,371
Total of Comparison Goods	€18,938,669	€4,424,788	€23,363,458
Overall Total	€36,398,237	€7,479,548	€43,877,785

With the data in Table 6.2 available at State level, a County-level per capita income adjustment is made to County Clare (based on its per capita expenditure for the 2018 base year) by using the CSO's publication on County Disposable Incomes and Regional GDP (published February 2021).

This data indicated that per capita incomes in County Clare were approximately 90.12% that of State in 2018. Growth in retail sales informed by the Retail Sales Index (RSI) and inflation are applied to the 2018 figures to bring it forward to 2021.

The use of RSI figures takes account of the recent historic and near-term effects of COVID-19 on retail sales. For the base year of 2021, per capita expenditure on convenience and comparison goods in County Clare has been estimated at €3,909 and €4,396, respectively.

Table 6.3: Per Capita Expenditure Estimates on Convenience and Comparison Goods – Clare County Council

(County) Determination of Per Capita Expenditure on Convenience and Comparison Retail Goods					
Year	Annual Growth Rate (%)*		Per Capita Expenditure (€)		Inflation to 2021
	Conven.	Compar.	Conven.	Compar.	HICP
2018	<i>Indexed at 90.12% of State</i>		€3,806	€4,335	-
2019	2.51%	2.51%	€3,937	€4,484	0.9%
2020	10.00%	-15.00%	€4,309	€3,792	-0.5%
2021	-10.00%	15.00%	€3,909	€4,396	0.8%
2022	1.00%	3.00%	€3,948	€4,528	-
2023	1.00%	3.00%	€3,988	€4,664	-
2024	1.00%	3.00%	€4,028	€4,804	-
2025	1.00%	3.00%	€4,068	€4,948	-
2026	1.00%	3.00%	€4,109	€5,096	-
2027	1.00%	3.00%	€4,150	€5,249	-
2028	1.00%	3.00%	€4,191	€5,406	-

As seen in Table 6.3, latest publications from the RSI indicated that expenditure on convenience goods increased by 10% from 2019 to 2020 with the onset of COVID-19, with comparison shopping expenditure reducing significantly by 15%.

This fluctuation is however expected to be reversed in 2021 with an outlook on retail shopping returning to ‘normal’ and expenditure on comparison goods, in turn, increasing by 15% while expenditure on convenience goods is expected to decrease as other retail food facilities such as restaurants and pubs open again.

6.4 Total Available Expenditure

The total available expenditure for each study area is calculated by multiplying the catchment population by the expenditure per capita per retail category, for each year. However, data available from the ASI provides expenditure figures for convenience and comparison goods, without distinction between non-bulky and bulky goods.

As total available expenditure is a factor of population and per category expenditure, it is important to allocate a percentage of expenditure on comparison goods to non-bulky and bulky goods.

With consideration given to the CSO Household Budget Survey (2016), the ASI and additional market sources, it is projected that approximately 80% of all expenditure on comparison goods is apportioned to non-bulky goods, with 20% going to bulky goods.

This proportionate split of expenditure on comparison goods is important to consider due to the significantly different levels of turnover generated by the sale of comparison goods

such as clothing, footwear, and smaller household durables, compared to that of bulky household goods (large appliances, furniture) sold in retail warehouses.

Table 6.4: Total Available Expenditure (Projected 2021 Prices)

Total Available Expenditure (At Projected 2021 Prices)			
Year	Convenience Total Available Expenditure (€)	Split of Comparison Total Available Expenditure - Non-Bulky Goods (€) (0.8%)	Split of Comparison Total Available Expenditure - Bulky Goods (€) (0.2%)
Ennis Catchment			
2021	211,151,023	189,952,309	47,488,077
2023	219,842,470	205,681,241	51,420,310
2026	233,377,021	231,573,433	57,893,358
2029	246,690,452	259,615,450	64,903,863
Kilrush Catchment			
2021	49,285,293	44,337,247	11,084,312
2023	51,222,729	47,923,199	11,980,800
2026	54,238,065	53,818,902	13,454,725
2029	57,097,344	60,088,879	15,022,220
Ennistymon Catchment			
2021	36,795,759	33,101,613	8,275,403
2023	38,235,040	35,772,117	8,943,029
2026	40,474,931	40,162,132	10,040,533
2029	42,600,468	44,832,459	11,208,115
Scariff Catchment			
2021	20,632,229	18,560,836	4,640,209
2023	21,416,821	20,037,249	5,009,312
2026	22,637,410	22,462,463	5,615,616
2029	23,778,528	25,024,371	6,256,093
Limerick Catchment			
2021	1,095,034,285	985,097,244	246,274,311
2023	1,157,809,918	1,083,229,190	270,807,298
2026	1,255,893,733	1,246,187,915	311,546,979
2029	1,358,059,614	1,429,213,235	357,303,309

Figures in the table above indicate a consistent growth in expenditure on convenience and comparison goods throughout the plan period, for all catchment areas within County Clare.

Even though the increase in expenditure in the catchments of Scariff (€11.2m; 25.6%) and Ennistymon (€20.5m; 26.2%) are low compared to the other catchments, expenditure figures between 2021 and 2029 have an average projected increase of 26.3% across all Clare catchments.

Expenditure in the Ennis Catchment is projected to increase by an estimated €122m (27.3%), which consists of a 16.8% and 36.7% increase in convenience and comparison non-bulky expenditure respectively. In turn, expenditure in the Limerick Catchment area (incl. Limerick City and County side) is set to increase by €818.2m or 35.2%, with higher growth rates of convenience and comparison non-bulky goods expenditure of 24% and 45%, respectively. A portion of this is attributed to the Co. Clare side of the catchment.

6.5 Adjusted Expenditure

The total available expenditure requires adjusting to take into account localised trade flows (whether physical or online) and out of catchment leakage. These 'inflow and outflows' or adjustments are informed through a consideration of the survey results, reported data on spending habits and forecasted changes. They are distilled as a percentage share for each retail type that is used to modify the total available expenditure (by taking from it or adding to it) for each catchment (see Section 4.3.8 for more information on these inflows and outflows).

The adjustments applied modulate the amount of expenditure available in a catchment area based on survey respondents' preference in shopping location. For the purpose of this assessment, and for the duration of the Plan, the various flows are held fixed from their determination point. The adjustments made to the total expenditure include a percentage increase for core inflow and a value increase for tourism spend, while decreases are applied for core outflow and outflow as a result of online shopping. The tables below set out the inflows, outflows and leakage applied to the total available expenditure in each retail category to produce the *adjusted* total available expenditure used in the assessment of turnover.

Table 6.5: Adjusted Total Available Expenditure - Convenience Goods

Adjusted Total Available Expenditure - Convenience Goods						
Year	Total Available Expenditure (€)	Outflow (%)	Inflow (%)	Online Outflow (%)	Tourism Expenditure Inflow (€)	Adjusted Total Available Expenditure (€)
Ennis Catchment						
2019	208,263,682	13.27%	9.26%	5.70%	8,241,750	196,278,144
2023	219,842,470	13.27%	9.26%	6.00%	6,807,075	204,638,157
2026	233,377,021	13.27%	9.26%	6.00%	8,272,275	218,282,782
2029	246,690,452	13.27%	9.26%	6.00%	9,218,550	231,209,501
Kilrush Catchment						
2019	48,701,446	8.87%	12.10%	5.70%	4,945,050	52,441,528
2023	51,222,729	8.87%	12.10%	6.00%	4,084,245	53,885,956
2026	54,238,065	8.87%	12.10%	6.00%	4,963,365	57,696,761
2029	57,097,344	8.87%	12.10%	6.00%	5,531,130	61,044,483

Ennistymon Catchment						
2019	36,366,959	16.09%	32.18%	5.70%	9,890,100	50,036,297
2023	38,235,040	16.09%	32.18%	6.00%	8,168,490	50,262,193
2026	40,474,931	16.09%	32.18%	6.00%	9,926,730	54,486,372
2029	42,600,468	16.09%	32.18%	6.00%	11,062,260	57,961,947
Scariff Catchment						
2019	20,413,951	48.48%	6.06%	5.70%	3,296,700	13,886,592
2023	21,416,821	48.48%	6.06%	6.00%	2,722,830	13,768,717
2026	22,637,410	48.48%	6.06%	6.00%	3,308,910	14,984,326
2029	23,778,528	48.48%	6.06%	6.00%	3,687,420	15,951,376
Limerick Catchment						
2019	1,062,584,126	0.00%	5.81%	5.70%	36,385,800	1,100,180,777
2023	1,095,034,285	0.00%	5.81%	8.70%	8,864,460	1,072,295,546
2026	1,189,974,566	0.00%	5.81%	6.00%	32,063,460	1,219,824,120
2029	1,289,401,938	0.00%	5.81%	6.00%	37,924,260	1,324,927,311

Following the consideration of flows, the adjusted expenditure for convenience goods over the period in the Ennis and Kilrush Catchments are forecasted to increase by 17.8% and 16.4%, respectively, by 2029 on pre-COVID 2019 levels (18.5% and 17.2% before adjustment), and by 20.4% by 2029 in the Limerick Catchment (21.3% before adjustment). Due to the high convenience outflow from Scariff, the increase in forecasted figures are lower at 14.9% by 2029 (16.5% before adjustment).

Forecasted changes in comparison non-bulky expenditure are set to see increases of 41.7% for Ennis Catchment on 2019 levels (36.8% pre-adjustment) and 37.5% for Limerick Catchment (34.8% pre-adjustment). The comparison non-bulky goods outflow from Ennistymon and Scariff reduces the available expenditure substantially (in 2029, from €44.8m to €27.2m in Ennistymon and from €25m to €21.6m in Scariff) with the increase after adjustment at 27.8% and 34.7% respectively, by 2029 on pre-COVID 2019 levels.

Comparison bulky goods are not forecast to benefit from the return of tourism inflows, unlike convenience and comparison non-bulky goods, however, on 2019 levels, Ennis Catchment is anticipated to increase by 39.8% by 2029 (36.8% pre-adjustment).

Table 6.6: Adjusted Total Available Expenditure - Comparison Goods

Adjusted Total Available Expenditure - Comparison Goods (Non-Bulky)						
Year	Total Available Expenditure (€)	Outflow (%)	Inflow (%)	Online Outflow (%)	Tourism Expenditure Inflow (€)	Adjusted Total Available Expenditure (€)
Ennis Catchment						
2019	189,750,688	47.34%	24.59%	15.20%	8,775,000	126,510,950
2023	205,681,241	47.34%	24.59%	12.00%	7,247,500	141,449,793
2026	231,573,433	47.34%	24.59%	12.00%	8,807,500	159,903,854
2029	259,615,450	47.34%	24.59%	12.00%	9,815,000	179,208,127
Kilrush Catchment						
2019	44,372,273	72.46%	7.25%	15.20%	5,265,000	13,954,249
2023	47,923,199	72.46%	7.25%	12.00%	4,348,500	15,266,655
2026	53,818,902	72.46%	7.25%	12.00%	5,284,500	17,545,850
2029	60,088,879	72.46%	7.25%	12.00%	5,889,000	19,578,814
Ennistymon Catchment						
2019	33,134,224	80.00%	5.00%	15.20%	10,530,000	13,777,154
2023	35,772,117	80.00%	5.00%	12.00%	8,697,000	13,347,375
2026	40,162,132	80.00%	5.00%	12.00%	10,569,000	15,790,077
2029	44,832,459	80.00%	5.00%	12.00%	11,778,000	17,606,220
Scariff Catchment						
2019	18,599,312	90.00%	0.00%	15.20%	3,510,000	2,542,836
2023	20,037,249	90.00%	0.00%	12.00%	2,899,000	2,498,255
2026	22,462,463	90.00%	0.00%	12.00%	3,523,000	3,073,751
2029	25,024,371	90.00%	0.00%	12.00%	3,926,000	3,425,513
Limerick Catchment						
2019	968,128,799	9.55%	32.36%	15.20%	38,740,000	1,080,596,977
2023	985,097,244	4.77%	32.36%	24.50%	9,438,000	1,024,964,866
2026	1,135,367,921	9.55%	32.36%	12.00%	34,138,000	1,292,302,024
2029	1,304,772,551	9.55%	32.36%	12.00%	40,378,000	1,486,268,669

Table 6.7: Adjusted Total Available Expenditure - Bulky Goods

Adjusted Total Available Expenditure - <u>Comparison Goods (Bulky)</u>					
Year	Total Available Expenditure (€)	Outflow (%)	Inflow (%)	Online Outflow (%)	Adjusted Total Available Expenditure (€)
Ennis Catchment					
2019	47,437,672	44.98%	20.76%	11.40%	30,539,684
2023	51,420,310	44.98%	20.76%	10.00%	33,823,533
2026	57,893,358	44.98%	20.76%	10.00%	38,081,410
2029	64,903,863	44.98%	20.76%	10.00%	42,692,818
Kilrush Catchment					
2019	11,093,068	70.00%	1.49%	11.40%	2,228,879
2023	11,980,800	70.00%	1.49%	10.00%	2,574,978
2026	13,454,725	70.00%	1.49%	10.00%	2,891,762
2029	15,022,220	70.00%	1.49%	10.00%	3,228,656
Ennistymon Catchment					
2019	8,283,556	70.00%	0.00%	11.40%	1,540,741
2023	8,943,029	70.00%	0.00%	10.00%	1,788,606
2026	10,040,533	70.00%	0.00%	10.00%	2,008,107
2029	11,208,115	70.00%	0.00%	10.00%	2,241,623
Scariff Catchment					
2019	4,649,828	80.00%	0.00%	11.40%	399,885
2023	5,009,312	80.00%	0.00%	10.00%	500,931
2026	5,615,616	80.00%	0.00%	10.00%	561,562
2029	6,256,093	80.00%	0.00%	10.00%	625,609
Limerick Catchment					
2019	242,032,200	8.58%	30.26%	11.40%	266,920,003
2023	246,274,311	6.43%	30.26%	21.80%	251,265,949
2026	283,841,980	8.58%	30.26%	10.00%	317,002,807
2029	326,193,138	8.58%	30.26%	10.00%	364,301,786

6.6 Retail Floorspace Assessments

6.6.1 Existing Floorspace and Gross to Net Ratios

Table 6.8 presents retail floorspace as calculated for each catchment area. A gross-to-net floorspace ratio was applied to the gross floorspace for each study area (and additional inclusions) to calculate the net trading floorspace for premises in each of the main retail categories. The ratios applied were informed by local and international research, with a specific review of the ratios applied in other county retail strategies (of varying scales) and the previous retail strategy for the Mid-West Region (which included Counties Limerick, Clare and Tipperary). These ratios were then sense checked with various operators within the sector and found to be consistent. In accordance with these benchmarks, the gross-to-net ratios applied in this strategy are set out below:

- Convenience Goods – 75:100 net to gross
- Non-Bulky Comparison Goods – 75:100 net to gross
- Bulky Comparison Goods – 85:100 net to gross

The percentage retail floorspace per category is based on the total gross floorspace of each type within the Study Area (with inclusions) of each town assessed. For the purpose of this report the floorspace assessments are consolidated according to the retail catchment of each area assessed. Therefore, the retail catchment areas for County Clare are comprised of the Ennis, Kilrush, Ennistymon, Scariff Catchments and the Limerick Catchment.

In addition to assessed floorspace, consideration of additional retailing outside of the survey areas (but within each catchment area) was also made, such that the observed floorspace in all the County Catchments were supplemented by an estimate of 12% additional Convenience, 7% additional Comparison non-Bulky and 2% additional Comparison Bulky goods. Floorspace in the Limerick Catchment was supplemented by an estimate of 10% additional Convenience, 2% additional Comparison non-Bulky and 3% additional Comparison Bulky goods. This allows for an estimate of additional floorspace across the entire catchment area to be accounted for; in a reasonable manner with respect to validated floorspaces within the study areas (and inclusions). Table 6.8 is set out with these estimates incorporated.

Table 6.8: Total Retail Floorspace within Catchment Area

Existing Retail Floorspace (Gross to Net Area)				
Retail Goods Types	2021			
	Gross Floor Area (m ²)	Gross to Net Ratio	Net Floor Area (m ²)	Area as a % of Total Area
Ennis Catchment				
Convenience	24,958	0.75	18,719	35%
Comparison - Non-Bulky	30,296	0.75	22,722	43%
Comparison - Bulky	15,754	0.85	13,391	22%

Existing Retail Floorspace (Gross to Net Area)				
Retail Goods Types	2021			
	Gross Floor Area (m²)	Gross to Net Ratio	Net Floor Area (m²)	Area as a % of Total Area
Overall Total	71,008	-	54,831	100.0%
Kilrush Catchment				
Convenience	10,390	0.75	7,792	59%
Comparison - Non-Bulky	5,610	0.75	4,208	32%
Comparison - Bulky	1,715	0.85	1,458	10%
Overall Total	17,716	-	13,458	100.0%
Ennistymon Catchment				
Convenience	5,157	0.75	3,868	64%
Comparison - Non-Bulky	1,408	0.75	1,056	18%
Comparison - Bulky	1,438	0.85	1,223	18%
Overall Total	8,004	-	6,147	100.0%
Scariff Catchment				
Convenience	2,288	0.75	1,716	43.7%
Comparison - Non-Bulky	1,388	0.75	1,041	26.5%
Comparison - Bulky	1,560	0.85	1,326	29.8%
Overall Total	5,236	-	4,083	100.0%
Limerick Catchment				
Convenience	112,902	0.75	84,677	29.6%
Comparison - Non-Bulky	214,329	0.75	160,747	56.2%
Comparison - Bulky	54,019	0.85	45,916	14.2%
Overall Total	381,250	-	291,339	100.0%

6.6.2 Observed Vacant Floorspace

An account was made of vacant premises observed during the assessment of retail floorspace matching the three categories of interest. Each catchment area's observed level of estimated vacant premises (in gross floorspace; assessed via desktop review), has been set out in Table 6.9.

Due to restricted trading conditions at the time of survey, it is likely that a quantum of observed closed premises were not due to true vacancy. Therefore, caution is advised around the use of the observed figures.

In considering vacancy with respect to future retail needs, it is important to have regard to the fact that not all vacant floorspace will be occupied by the retail categories of interest. Some of this floorspace will be occupied by retail services and other uses. The assessed centres by their nature include a wide mix of retail and non-retail uses and this point has been considered when assessing the potential utilisation of observable vacancy. This study has assumed a conservative utilisation rate of 25% of total vacancy

to be allocated for future retail use. As such, 25% of total vacancy in each catchment has been identified. This is set out below and is considered further in Section 6.12.

Table 6.9: Retail Floorspace Vacancy within Study Areas

Vacant Floorspace and Assumed Utilisation Rate	
Vacant Floorspace	Gross Floor Area (m²)
Ennis Catchment	
Total Vacant Floorspace	7,424.35
Assumed Utilisation Rate	25%
Adjusted Vacant Floorspace	1,856.09
Kilrush Catchment	
Total Vacant Floorspace	23,921.70
Assumed Utilisation Rate	25%
Adjusted Vacant Floorspace	5,980.42
Ennistymon Catchment	
Total Vacant Floorspace	6,608.44
Assumed Utilisation Rate	25%
Adjusted Vacant Floorspace	1,652.11
Scariff Catchment	
Total Vacant Floorspace	4,758.35
Assumed Utilisation Rate	25%
Adjusted Vacant Floorspace	1,189.59
Limerick Catchment	
Total Vacant Floorspace	174,274.83
Assumed Utilisation Rate	25%
Adjusted Vacant Floorspace	43,568.71

6.7 Indicative Existing Turnover

The indicative existing turnover provides an estimate of the current turnover generated by the existing retail floorspace per category, based on the adjusted available spend in each catchment area.

This indicative turnover is calculated by dividing the adjusted available expenditure by the existing floorspace, for each retail category.

Table 6.10: Indicative Turnover Generated by Existing Retail Floorspace

Existing Retail Floorspace and Indicative Retail Turnover			
Retail Goods Types	2021	2019 pre-Covid	
	Net Floor Area (M²)	Adjusted Total Available Expenditure (€)	Indicative Turnover Per M² (€)
Ennis Catchment			
Convenience	18,719	€196,278,144	€10,485.77
Comparison - Non-Bulky	22,722	€126,510,950	€5,567.81
Comparison - Bulky	13,391	€30,539,684	€2,280.59
Overall Total	54,831	€353,328,777	-
Kilrush Catchment			
Convenience	7,792	€52,441,528	€6,729.75
Comparison - Non-Bulky	4,208	€13,954,249	€3,316.26
Comparison - Bulky	1,458	€2,228,879	€1,528.84
Overall Total	13,458	€68,624,655	-
Ennistymon Catchment			
Convenience	3,868	€50,036,297	€12,936.72
Comparison - Non-Bulky	1,056	€13,777,154	€13,045.01
Comparison - Bulky	1,223	€1,540,741	€1,260.17
Overall Total	6,147	€65,354,192	-
Scariff Catchment			
Convenience	1,716	€13,886,592	€8,093.43
Comparison - Non-Bulky	1,041	€2,542,836	€2,441.91
Comparison - Bulky	1,326	€399,885	€301.57
Overall Total	4,083	€16,829,313	-
Limerick Catchment			
Convenience	84,677	€1,100,180,777	€12,992.72
Comparison - Non-Bulky	160,747	€1,080,596,977	€6,722.36
Comparison - Bulky	45,916	€266,920,003	€5,813.23
Overall Total	291,339	€2,447,697,757	-

The figures in the table above indicate that retail trade in the convenience goods and comparison non-bulky goods categories are generally healthy. Convenience retail trading levels in the Ennis, Ennistymon, and Limerick Catchments are particularly strong, with the sector operating at a turnover ratio of €10,485/m², €12,936/m², and €12,993/m², respectively.

Comparison non-bulky trading figures show more variation, with an indicative turnover of €13,045/m² in Ennistymon, which is supported by tourism expenditure inflow. The amount of comparison non-bulky floorspace provision in the Ennis and Limerick

Catchments draw expenditure inflow in addition to local expenditure, resulting in healthy trading sector turnovers of €5,568/m² and €6,722/m², respectively.

A general assessment of convenience and comparison non-bulky retail trade performance in other counties, including Cork, Carlow, Kilkenny, Waterford, Roscommon, Sligo, Louth, Wexford, Monaghan, and Dublin, show that the indicative trade in the catchments are comparatively on par, if not higher. With regard to comparison bulky goods, however, the considerable trade outflow from the Ennistymon (70%) and Scariff (80%) Catchments result in comparatively lower indicative turnover figures.

The indicative turnovers do however mask differences in the types and scale of retail facilities available in each of the catchment areas. Generally, larger purpose-built retail centres or retail facilities in prime locations within shopping nodes can distort figures at low levels. As such, shops in prime locations will have proportionately higher turnover per m² than stores located in less frequented or lower traffic centres or locations. The prominence of brand and market share also have influences on trading levels. Independent retailers' indicative turnovers are usually significantly lower than larger supermarkets or chains, with the latter having the capacity to trade at high volumes, even at lower profit margins, to control market share over an extended period.

6.8 Representative Existing Turnover

As it is unlikely that all retail facilities in each catchment will trade equally, the indicative turnover figures presented in Table 6.10 would not apply to all retail. To moderate turnover figures and for any over or under trading to capacity a representative turnover is applied instead to the existing floorspace. The representative turnover is based on the performance of each retail category in each catchment area, and the representative of comparative areas in other counties. In some cases, indicative turnover rates are adjusted down to the representative rate, while in other cases the indicative turnover is adjusted upward. A summary of the adjustments is presented below.

— Ennis Catchment

- The indicative turnover per m² across all retail categories have been moderated and adjusted slightly downward to representative figures of €10,000/m², €6,000/m² and €2,500/m² for convenience, comparison non-bulky, and comparison bulky, respectively.

— Kilrush Catchment

- The representative turnover figure per m² for the retail categories in Kilrush have been adjust slightly downward, to take a high prevalence of vacant floorspace into consideration.
- Representative figures are modelled at €5,000/m², €2,500/m² and €1,000/m² for convenience, comparison non-bulky, and comparison bulky, respectively.

— Ennistymon Catchment

- The prominent inflow of tourism expenditure to the Ennistymon Catchment with relatively low net floorspace results in comparatively high indicative turnover per m².
- To account for the variability of tourism expenditure inflow and vacant floorspace in noted, the indicative turnovers for convenience and comparison non-bulky goods have been adjusted down to representative turnover figures of €7,000/m².

- Similarly, the indicative bulky goods turnovers have been moderated slightly to the representative figure of €1,000/m²
- Scariff Catchment
 - To account for convenience and comparison non-bulky goods expenditure outflow from Scariff Catchment, the indicative turnovers for the above-mentioned categories have been adjusted slightly downward to the representative figure of €5,000/m² and €2,000/m², respectively.
 - The indicative bulky goods turnovers have been adjusted upward to an operable representative figure of €1,000/m².
- Limerick Catchment
 - As the convenience indicative turnover per m² is potentially an outlier, it has been adjusted down to the representative figure of €12,000/m²
 - Indicative comparison and bulky goods turnovers have been moderated slightly to the representative figure of €7,000/m² and €6,000/m² respectively.

The following table present all the catchment representative turnover of existing floorspace per catchment area.

Table 6.11: Representative Turnover of Existing Retail Floorspace

Representative Turnover of Existing Retail Floorspace		
Retail Goods Types	Representative Turnover Per M ² (€)	Representative Turnover of Existing Retail (€)
Ennis Catchment		
Convenience	€10,000.00	€187,185,278
Comparison - Non-Bulky	€6,000.00	€136,331,021
Comparison - Bulky	€2,500.00	€33,477,765
Overall Total	-	€356,994,064
Kilrush Catchment		
Convenience	€5,000.00	€38,962,459
Comparison - Non-Bulky	€2,500.00	€10,519,579
Comparison - Bulky	€1,000.00	€1,457,890
Overall Total	-	€50,939,928
Ennistymon Catchment		
Convenience	€7,000.00	€27,074,402
Comparison - Non-Bulky	€7,000.00	€7,392,873
Comparison – Bulky	€1,000.00	€1,222,643
Overall Total	-	€35,689,918
Scariff Catchment		
Convenience	€5,000.00	€8,578,933
Comparison - Non-Bulky	€2,000.00	€2,082,658

Representative Turnover of Existing Retail Floorspace		
Retail Goods Types	Representative Turnover Per M ² (€)	Representative Turnover of Existing Retail (€)
Comparison – Bulky	€1,000.00	€1,325,996
Overall Total	-	€11,987,586
Limerick Catchment		
Convenience	€12,000.00	€1,016,120,840
Comparison - Non-Bulky	€7,000.00	€1,125,226,359
Comparison – Bulky	€6,000.00	€275,495,746
Overall Total	-	€2,416,842,946

Despite the adjustments made to indicative turnover figures, the representative turnover used in the modelling still present healthy retail trading across retail types in each catchment area. Using this adjustment, the calculation of the residual floorspace capacity is not influenced by assumed increases in turnover efficiency, but rather identify the systemic capacity of additional floorspace should the existing floorspace capacity be trading at a healthy level.

6.9 Assumed Future Turnover

In order to calculate the requirements for additional retail floorspace in each catchment it is important to factor in the turnover per m² of future retail floorspace. For the purpose of this assessment, each catchment area's representative turnover (per retail category) has been used for the future floorspace assessment – with *no assumed change* across the Plan's period. The turnovers used are presented in Table 6.11.

6.10 Residual Capacity

The future retail floorspace requirements are calculated using the various inputs as outlined in the preceding subsections. Analysis and modelling of the inputs provide the residual capacity potential in expenditure, which subsequently informs the minimum additional floorspace requirements for each catchment area over the lifetime of the retail strategy.

The residual capacity of retail floorspace is identified through the calculation of a surplus or deficit, which is the difference between the adjusted available expenditure and the representative turnover total that can be generated from the existing floorspace in each category. Therefore, a positive difference suggests a surplus of expenditure, which represents potential capacity for new floorspace to capture the available expenditure. In turn, a negative difference suggests a shortfall in expenditure, which would not promote the development of additional floorspace until the expenditure returns to a surplus. A negative difference could also suggest an over-supply of retail floorspace in the relevant retail category, or an unhealthy trading turnover ratio of the existing floorspace.

The residual surplus/deficit for additional retail floorspace within each catchment area has been obtained by subtracting the representative turnover totals of existing convenience, comparison and bulky goods expenditure, as set out in Table 6.11, by the adjusted total available expenditure as set out in Table 6.5, Table 6.6, and Table 6.7. This is summarised (unadjusted by vacant floorspace) in the tables below (showing each retail type).

6.10.1 Convenience Goods

From Table 6.12 it is evident that the levels of expenditure on convenience goods in catchments exceed the capacity of the existing convenience goods floorspace provision, and therefore would warrant additional convenience floorspace in each catchment. Although the initial additional requirement for convenience goods floorspace in Ennis is very low, steady growth in available expenditure between 2023 and 2029 could realise the need for 4,402m² additional convenience floorspace in the catchment. Equally strong growth of expenditure in the Kilrush and Ennistymon Catchment from 2023 to 2029 would see the requirement of additional convenience floorspace increase substantially if not addressed.

Table 6.12: Expenditure Available for New Retail - Convenience Goods (Residual Surplus and Floorspace Capacity)

Expenditure Available for New Retail (Residual Surplus and Floorspace Capacity)					
<u>Convenience Goods</u>					
Expenditure Residual				Floorspace Capacity	
Year	Adjusted Total Available Expenditure (€)	Representative Turnover Total of Existing Floorspace (€)	Residual Surplus/ Shortfall (€)	Turnover per sq. m of Future Retail Floorspace (€)	Additional Floorspace Reqs. (Cumulative, m2)
Ennis Catchment					
2019	196,278,144	187,185,278	9,092,866	10,000	909
2023	204,638,157	187,185,278	17,452,879	10,000	1,745
2026	218,282,782	187,185,278	31,097,504	10,000	3,110
2029	231,209,501	187,185,278	44,024,223	10,000	4,402
Kilrush Catchment					
2019	52,441,528	38,962,459	13,479,069	5,000	2,696
2023	53,885,956	38,962,459	14,923,497	5,000	2,985
2026	57,696,761	38,962,459	18,734,302	5,000	3,747
2029	61,044,483	38,962,459	22,082,024	5,000	4,416

Ennistymon Catchment					
2019	50,036,297	27,074,402	22,961,895	7,000	3,280
2023	50,262,193	27,074,402	23,187,791	7,000	3,313
2026	54,486,372	27,074,402	27,411,970	7,000	3,916
2029	57,961,947	27,074,402	30,887,545	7,000	4,413
Scariff Catchment					
2019	13,886,592	8,578,933	5,307,659	5,000	1,062
2023	13,768,717	8,578,933	5,189,785	5,000	1,038
2026	14,984,326	8,578,933	6,405,393	5,000	1,281
2029	15,951,376	8,578,933	7,372,444	5,000	1,474
Limerick Catchment					
2019	1,100,180,777	1,016,120,840	84,059,937	12,000	7,005
2023	1,184,153,993	1,016,120,840	168,033,153	12,000	14,003
2026	1,289,869,726	1,016,120,840	273,748,886	12,000	22,812
2029	1,396,802,792	1,016,120,840	380,681,952	12,000	31,723

6.10.2 Comparison Goods

Table 6.13 below sets out the residual capacity of comparison non-bulky retailing. From the table it is seen that the Ennis Catchment area had an initial residual surplus of retail floorspace (a negative requirement of -1,637m²), although projected growth in the adjusted total available expenditure from 2023 to 2029 is anticipated to create a residual shortfall that would motivate an increase in comparison goods floorspace provision.

The projected growth in expenditure in the Ennis Catchment translates to a shortfall of €42.9m by 2029, which would support an additional 7,146 m² of retail floorspace by the end of the Plan period. The high outflow of expenditure on comparison goods in the Scariff Catchment however shows projected figures for 2026 showing a moderate residual shortfall of €991,093, reflecting a small requirement of 496 m². Growth in expenditure does however continue through to 2029, resulting in a shortfall of 671 m² in comparison retail floorspace.

Table 6.13: Expenditure Available for New Retail - Comparison Goods (Residual Surplus and Floorspace Capacity)

Expenditure Available for New Retail (Residual Surplus and Floorspace Capacity)					
<u>Comparison Non-Bulky Goods</u>					
Expenditure Residual				Floorspace Capacity	
Year	Adjusted Total Available Expenditure (€)	Representative Turnover Total of Existing Floorspace (€)	Residual Surplus/ Shortfall (€)	Turnover per sq. m of Future Retail Floorspace (€)	Additional Floorspace Reqs. (Cumulative, m ²)
Ennis Catchment					
2019	126,510,950	136,331,021	-9,820,071	6,000	-1,637
2023	141,449,793	136,331,021	5,118,772	6,000	853
2026	159,903,854	136,331,021	23,572,833	6,000	3,929
2029	179,208,127	136,331,021	42,877,106	6,000	7,146
Kilrush Catchment					
2019	13,954,249	10,519,579	3,434,669	2,500	1,374
2023	15,266,655	10,519,579	4,747,075	2,500	1,899
2026	17,545,850	10,519,579	7,026,270	2,500	2,811
2029	19,578,814	10,519,579	9,059,235	2,500	3,624
Ennistymon Catchment					
2019	13,777,154	7,392,873	6,384,281	7,000	912
2023	13,347,375	7,392,873	5,954,502	7,000	851
2026	15,790,077	7,392,873	8,397,204	7,000	1,200
2029	17,606,220	7,392,873	10,213,347	7,000	1,459
Scariff Catchment					
2019	2,542,836	2,082,658	460,178	2,000	230
2023	2,498,255	2,082,658	415,597	2,000	208
2026	3,073,751	2,082,658	991,093	2,000	496
2029	3,425,513	2,082,658	1,342,855	2,000	671
Limerick Catchment					
2019	1,080,596,977	1,125,226,359	-44,629,382	7,000	-6,376
2023	1,230,728,211	1,125,226,359	105,501,852	7,000	15,072
2026	1,419,631,792	1,125,226,359	294,405,433	7,000	42,058
2029	1,627,730,278	1,125,226,359	502,503,919	7,000	71,786

6.10.3 Bulky Goods

As seen with Ennis Catchment's comparison goods residual in Table 6.13, the residual for bulky goods in Table 6.14 was also in surplus in 2019, while the Scariff Catchment also showed an initial surplus in bulky goods; meaning there was existing under-utilised capacity in these catchments. Despite annual increases in expenditure on bulky goods in the Scariff Catchment, there may be an ongoing residual surplus of -700m² by 2029.

The projected growth in bulky goods expenditure in the Ennis Catchment quickly avails of the residual surplus, building to a shortfall of 3,686m² by 2029. The increases in available expenditure throughout the Plan period sees a need for additional bulky goods floorspace in 2029 of 1,771 m² and 1,019m² for the Kilrush and the Ennistymon catchments respectively.

Table 6.14: Expenditure Available for New Retail - Bulky Goods (Residual Surplus and Floorspace Capacity)

Expenditure Available for New Retail (Residual Surplus and Floorspace Capacity)					
<u>Comparison Bulky Goods</u>					
Expenditure Residual				Floorspace Capacity	
Year	Adjusted Total Available Expenditure (€)	Representative Turnover Total of Existing Floorspace (€)	Residual Surplus/ Shortfall (€)	Turnover per sq. m of Future Retail Floorspace (€)	Additional Floorspace Reqs. (Cumulative, m2)
Ennis Catchment					
2019	30,539,684	33,477,765	-2,938,081	2,500	-1,175
2023	33,823,533	33,477,765	345,768	2,500	138
2026	38,081,410	33,477,765	4,603,645	2,500	1,841
2029	42,692,818	33,477,765	9,215,053	2,500	3,686
Kilrush Catchment					
2019	2,228,879	1,457,890	770,989	1,000	771
2023	2,574,978	1,457,890	1,117,088	1,000	1,117
2026	2,891,762	1,457,890	1,433,872	1,000	1,434
2029	3,228,656	1,457,890	1,770,766	1,000	1,771
Ennistymon Catchment					
2019	1,540,741	1,222,643	318,098	1,000	318
2023	1,788,606	1,222,643	565,962	1,000	566
2026	2,008,107	1,222,643	785,463	1,000	785
2029	2,241,623	1,222,643	1,018,980	1,000	1,019

Scariff Catchment					
2019	399,885	1,325,996	-926,110	1,000	-926
2023	500,931	1,325,996	-825,064	1,000	-825
2026	561,562	1,325,996	-764,434	1,000	-764
2029	625,609	1,325,996	-700,386	1,000	-700
Limerick Catchment					
2019	266,920,003	275,495,746	-8,575,744	6,000	-1,429
2023	302,445,302	275,495,746	26,949,556	6,000	4,492
2026	347,944,538	275,495,746	72,448,792	6,000	12,075
2029	399,046,511	275,495,746	123,550,764	6,000	20,592

6.11 Future Floorspace Potential – Unadjusted for Vacancy

Based on the application of the assumed future turnover rates in section 6.9, the residual in expenditure across each retail category has been set out in Tables 6.12-6.14. By dividing this residual by the assumed future turnover rate, the resulting future floorspace requirements were determined in square meters.

A summary of these figures has been set out in Table 6.15. It should be noted that the figures do not include “pipeline” floorspace, i.e. retail applications which have already been permitted but not constructed at the time of the preparation of the retail strategy. Nor do the figures have regard to the extent of vacant floorspace currently observed. The extent of unimplemented floorspace is discussed in section 6.14. The extent of vacant floorspace is explored in sections 6.6.2, 6.12 and 6.13 (in accounting for the use of vacant floorspace).

Table 6.15: Indicative Future Retail Floorspace Potential (Cumulative)

Indicative Future Retail Floorspace Potential (Cumulative)		
Retail Goods Type	Floorspace Capacity (m2)	
	2026	2029
Ennis Catchment		
Convenience Goods	3,110	4,402
Comparison Goods (Non-Bulky)	3,929	7,146
Comparison Goods (Bulky)	1,841	3,686
Total Retail Floorspace Potential	8,880	15,235
Kilrush Catchment		
Convenience Goods	3,747	4,416
Comparison Goods (Non-Bulky)	2,811	3,624
Comparison Goods (Bulky)	1,434	1,771
Total Retail Floorspace Potential	7,991	9,811

Ennistymon Catchment		
Convenience Goods	3,916	4,413
Comparison Goods (Non-Bulky)	1,200	1,459
Comparison Goods (Bulky)	785	1,019
Total Retail Floorspace Potential	5,901	6,891
Scariff Catchment		
Convenience Goods	1,281	1,474
Comparison Goods (Non-Bulky)	496	671
Comparison Goods (Bulky)	-764	-700
Total Retail Floorspace Potential	1,012	1,446
Limerick Catchment		
Convenience Goods	22,812	31,723
Comparison Goods (Non-Bulky)	42,058	71,786
Comparison Goods (Bulky)	12,075	20,592
Total Retail Floorspace Potential	76,945	124,102

6.12 Assumed Net Vacant Floorspace

As outlined in section 6.6.2 vacant floorspace was observed in each catchment area during the 2021 survey of retailing. In considering vacancy it is important to have regard to the fact that not all vacant floorspace will be occupied by retail floorspace. Some of this floorspace will be occupied by retail services and other uses. An assumed 75% of the identified floorspace will be utilised by other commercial uses (or to reflect an over-assessment of premises closed due to COVID-19, but not truly vacant), leaving 25% to be allocated across an assumed distribution of convenience, comparison non-bulky and comparison bulky. An assumption for allocating the uptake of vacant floorspace across the retail categories was considered for each catchment area, as shown in the table below.

Table 6.16: Assumed Distribution of Vacant Floorspace Use per Catchment Area

Assumed Distribution per Catchment Area					
	Ennis	Kilrush	Ennistymon	Scariff	Limerick
Convenience	10.0%	50.0%	10.0%	10.0%	10.0%
Comparison non-Bulky	70.0%	30.0%	45.0%	45.0%	45.0%
Comparison Bulky	20.0%	20.0%	45.0%	45.0%	45.0%
	100.0%	100.0%	100.0%	100.0%	100.0%

These rates reflect consideration of the higher floorspace utilisation by returning businesses post-COVID lockdown measures, as well as the utilisation of vacant space for new retail trade.

When factored against the adjusted vacant floorspace (at 25% total), a distribution into each of the three retail categories of interest results. This is then reduced from gross to net using the same ratios established in section 6.6.2. The adjusted vacant floorspace as assigned to each retail type for consideration against future requirements is set out below.

Table 6.17: Adjusted Vacant Floorspace by Assumed Retail Category Distribution

Adjusted Vacant Floorspace by Assumed Retail Category Distribution (Including Gross to Net Reduction)				
Retail Category	% of All Retail Floorspace	Allocated Gross Vacant	Gross to Net Reduction	Allocated Net Vacant
	%	m2	Ratios	m2
Ennis Catchment				
Convenience	10.0%	185.61	0.75	139.21
Comparison - Non-Bulky	70.0%	1,299.26	0.75	974.45
Comparison - Bulky	20.0%	371.22	0.85	315.53
Adjusted Vacant Floorspace	100.0%	1,856.09	-	1,429.19
Kilrush Catchment				
Convenience	50.0%	2,990.21	0.75	2,242.66
Comparison - Non-Bulky	30.0%	1,794.13	0.75	1,345.60
Comparison - Bulky	20.0%	1,196.08	0.85	1,016.67
Adjusted Vacant Floorspace	100.0%	5,980.42	-	4,604.93
Ennistymon Catchment				
Convenience	10.0%	165.21	0.75	123.91
Comparison - Non-Bulky	45.0%	743.45	0.75	557.59
Comparison - Bulky	45.0%	743.45	0.85	631.93
Adjusted Vacant Floorspace	100.0%	1,652.11	-	1,313.43
Scariff Catchment				
Convenience	10.0%	118.96	0.75	89.22
Comparison - Non-Bulky	45.0%	535.31	0.75	401.49
Comparison - Bulky	45.0%	535.31	0.85	455.02
Adjusted Vacant Floorspace	100.0%	1,189.59	-	945.72

Limerick Catchment				
Convenience	10.0%	4,356.87	0.75	3,267.65
Comparison - Non-Bulky	45.0%	19,605.92	0.75	14,704.44
Comparison - Bulky	45.0%	19,605.92	0.85	16,665.03
Adjusted Vacant Floorspace	100.0%	43,568.71	-	34,637.12

When classified in this way, the assumed vacant floorspace can be factored against the identified future retail floorspace potential, to see by what amount, a reduced quantum of floorspace might be needed due to existing additional capacity.

Where possible additional retail floorspace needs will be targeted within existing vacant floorspace capacity on appropriately zoned lands. For large scale retail applications, the onus will be on the applicant to demonstrate as part of the sequential test assessment that existing vacant units within the retail core are not suitable, viable and available to accommodate a development.

6.13 Future Floorspace Potential – Adjusted for Vacancy

The quanta of required future floorspace has been set out in Table 6.15. However, in considering the mitigating effect of existing vacant floorspace in each catchment area, these figures have been updated in Table 6.18 below.

It should be noted that while the figures now account for vacant floorspace, they do not include “pipeline supply”. The extent of unimplemented floorspace is discussed in sections 6.14 and is factored into requirements in section 6.15. Final requirements are set out in section 6.16, after accounting for the disaggregation of the Limerick Catchment for the Co. Clare side exclusively.

Table 6.18: Indicative Future Retail Floorspace Potential (Cumulative) - Adjusted for Vacancy

Indicative Future Retail Floorspace Potential (Cumulative) - <u>Adjusted</u> for Vacancy		
Retail Goods Type	Floorspace Capacity (m2)	
	2026	2029
Ennis Catchment		
Convenience Goods	2,971	4,263
Comparison Goods (Non-Bulky)	2,954	6,172
Comparison Goods (Bulky)	1,526	3,370
Total Retail Floorspace Potential	7,451	13,805

Kilrush Catchment		
Convenience Goods	1,504	2,174
Comparison Goods (Non-Bulky)	1,465	2,278
Comparison Goods (Bulky)	417	754
Total Retail Floorspace Potential	3,386	5,206
Ennistymon Catchment		
Convenience Goods	3,792	4,289
Comparison Goods (Non-Bulky)	642	901
Comparison Goods (Bulky)	154	387
Total Retail Floorspace Potential	4,588	5,577
Scariff Catchment		
Convenience Goods	1,192	1,385
Comparison Goods (Non-Bulky)	94	270
Comparison Goods (Bulky)	-1,219	-1,155
Total Retail Floorspace Potential	66	500
Limerick Catchment		
Convenience Goods	19,545	28,456
Comparison Goods (Non-Bulky)	27,353	57,082
Comparison Goods (Bulky)	-4,590	3,927
Total Retail Floorspace Potential	42,308	89,464

6.14 Future Pipeline Supply

The tables set out in the previous section do not account for “pipeline supply”, i.e. extant planning permissions which have been permitted but not yet commenced or completed at the time of the preparation of the Retail Strategy.

An exercise was undertaken to identify and review planning applications which had been granted and were still within their permitted period of duration (with or without activity, as indicated by any commencement notices associated). The extent of this unimplemented floorspace is summarised below.

A cut-off point of date of February 2021 was used when undertaking this review of consents and the figures classified by those applications which were not yet commenced (Table 6.19), and those applications which have been commenced, but have not yet been completed (Table 6.20).

Table 6.19 outlines that 1,455.78 sq.m has been granted but has yet to commence within the catchments. The majority of the floorspace is proposed within Ennis area. Scariff and Clare-MASP catchments have had no granted and not commenced retail planning applications within the last 5 years. Kilrush has had a minimal increase in granted floorspace within this time period.

Table 6.19: Total floorspace for Granted but NOT Commenced Retail Planning Applications

Total floorspace for Granted but NOT Commenced Retail Planning Applications							
	Limerick Catchment - Clare	Ennis	Ennis-tymon	Kilrush	MASP - Clare	Scariff	All Catchments
Granted but NOT Commenced (m²)							
Total	114.86	919.21	286.99	134.9	0	0	1,455.78
Breakdown by Retail type (m²)							
Convenience	0	147.63	200.49	105	0	0	453.12
Comparison - Non-Bulky	114.68	437.58	0	0	0	0	552.26
Comparison-Bulky	0	0	0	0	0	0	0
Generic		334	86.5	29.9	0	0	450.4

Table 6.20 states that 914.18 sq.m of total floorspace has commenced but has not yet been fully completed. Figure 6-3 illustrates the location of the granted developments throughout County Clare. As shown, there has been no granted applications within the town settlements of Shannon and Scariff over the 5-year period. Figure 6-4 concentrates on Ennis, which shows a total of seven granted applications within the CSO settlement boundary over the last 5 years. Application details are available in A.3.

Table 6.20: Total floorspace for Commenced but Not Completed Retail Planning Applications

Total floorspace for Commenced but Not Completed Retail Planning Applications							
	Limerick Catchment - Clare	Ennis	Ennistymon	Kilrush	MASP - Clare	Scariff	All Catchments
Granted & Commenced (m²)							
Total	0	115	0	0	799.18	0	914.18
Breakdown by Retail type (m²)							
Convenience	0	0	0	0	192.2	0	192.2
Comparison - Non-Bulky	0	0	0	0	0	0	0
Comparison-Bulky	0	0	0	0	606.98	0	606.98
Generic	0	115	0	0	0	0	115

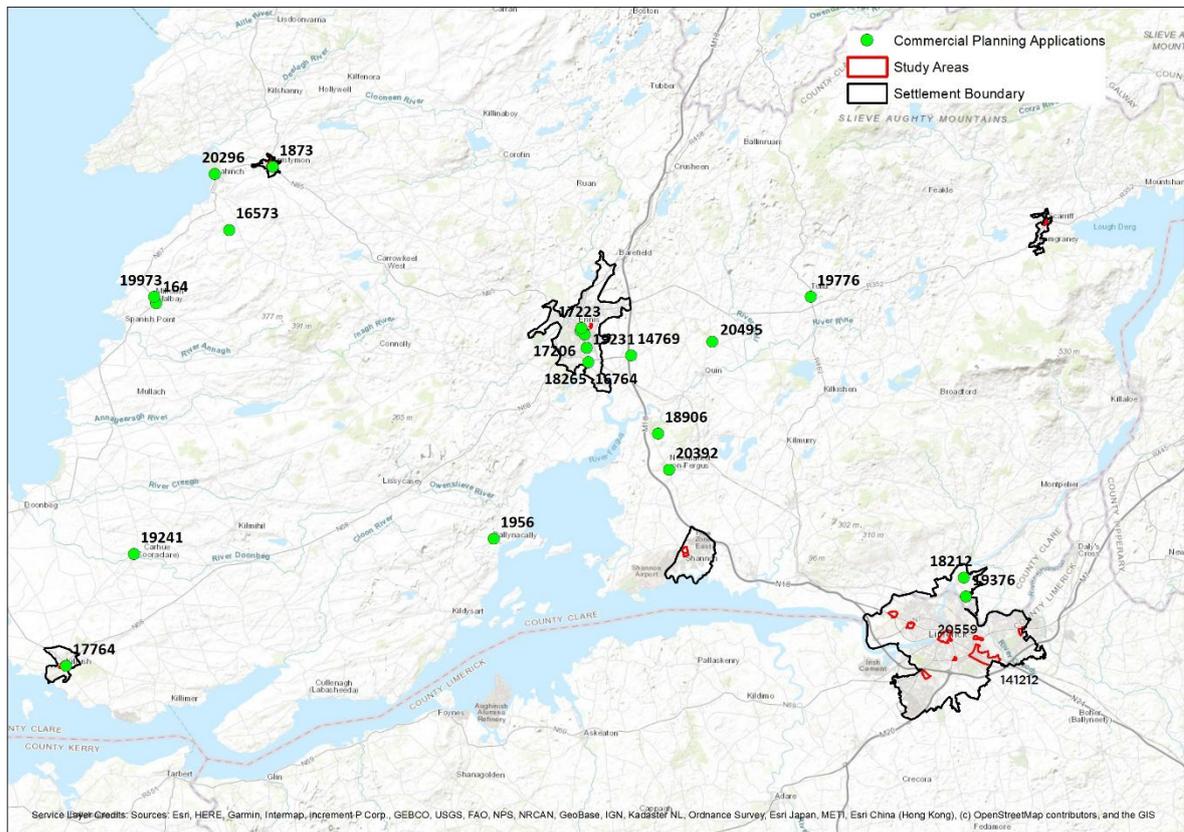


Figure 6-3: Commercial Planning Applications in County Clare

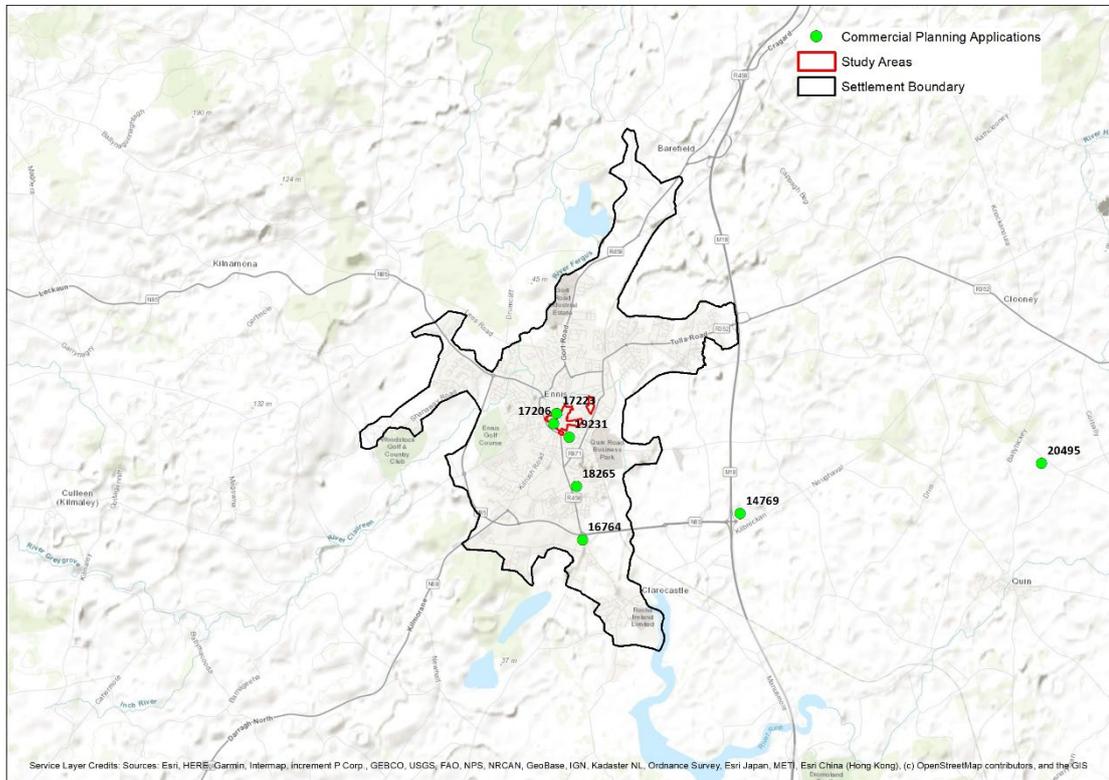


Figure 6-4: Commercial Planning Applications in Ennis

6.15 Future Floorspace Potential – Adjusted for Vacancy & Pipeline Supply

Whereas identified vacant floorspace presents the most likely mitigant to future requirements, pipeline supply may also be considered, albeit, with less certainty, as it is subject to a myriad of delivery factors which may delay or prevent it from being fully realised within the lifetime of the Retail Strategy. A number of these permitted schemes, if delivered, would have an impact on the identified requirements set out in section 6.11 (for unadjusted requirements) and section 6.13 (for requirements adjusted by vacancy). In some cases, this would increase the identified residual surplus of floorspace such that no further floorspace is necessary, in others, it would reduce requirements accordingly.

In exploring the impact of the pipeline supply, an assumed 50% delivery rate of extant permissions has been taken, and the requirements, adjusted for vacancy, have been further adjusted below with this 50% in mind. Extant permissions classified as ‘Generic Retail’ (where the specific retail type was not specified) have been distributed across the retail types using the assumed rate of distribution applied to the assumed utilisation of vacant floorspace in section 6.12. Table 6.21 below sets out the additive floorspace in this regard.

Table 6.21: Allocated Extant Permissions - Consideration of Planning Pipeline

Allocated Extant Permissions - Assumed 50% Delivery Rate of Pipeline and Distribution of 'Generic Retail Floorspace'							
Retail Type	Granted m2	Commenced m2	Assumed 50% Delivery	Generic Retail for Distrib.	Assumed Rates of Distrib.	Distrib Generic Retail m2	Distrib. Total m2
Ennis Catchment							
Convenience Goods	687.63		344	225	10%	22	366.27
Comparison Goods (Non-Bulky)		180.58	90		70%	157	247.44
Comparison Goods (Bulky)	0.00		0		20%	45	44.90
Generic Retail	334.00	115.00	225		100%	225	658.61
Kilrush Catchment							
Convenience Goods	105.00		53	15	50%	7	59.98
Comparison Goods (Non-Bulky)			0		30%	4	4.49
Comparison Goods (Bulky)			0		20%	3	2.99
Generic Retail	29.90		15		100%	15	67.45
Ennistymon Catchment							
Convenience Goods	200.49		100	43	10%	4	104.57
Comparison Goods (Non-Bulky)			0		45%	19	19.46
Comparison Goods (Bulky)			0		45%	19	19.46
Generic Retail	86.50		43		100%	43	143.50
Scariff Catchment							
Convenience Goods	0.00		0	0	10%	0	0.00
Comparison Goods (Non-Bulky)	0.00		0		45%	0	0.00
Comparison Goods (Bulky)	0.00		0		45%	0	0.00
Generic Retail	0.00		0		100%	0	0.00

Allocated Extant Permissions - Assumed 50% Delivery Rate of Pipeline and Distribution of 'Generic Retail Floorspace'							
Retail Type	Granted m2	Commenced m2	Assumed 50% Delivery	Generic Retail for Distrib.	Assumed Rates of Distrib.	Distrib Generic Retail m2	Distrib. Total m2
Limerick Catchment							
Convenience Goods	6,088.50	551.20	3,320	2515	10%	252	3,571.38
Comparison Goods (Non-Bulky)	710.08	2,218.00	1,464		45%	1,132	2,595.93
Comparison Goods (Bulky)	0.00	606.98	303		45%	1,132	1,435.38
Generic Retail	5,030.60	0.00	2,515		100%	2,515	7,602.68

The quantum of future additional floorspace potential, adjusted for vacancy, was set out in Table 6.18. This has been adapted to incorporate the mitigating effect of an assumed 50% delivery of identified extant permissions as of February 2021 across the catchment areas, over the plan period. Consideration of the figures in Table 6.21 have been set out in Table 6.22 below, as the indicative future floorspace requirements adjusted for both vacancy and planning pipeline.

Table 6.22: Indicative Future Retail Floorspace Potential (Cumulative) - Adjusted for Vacancy & Pipeline

Indicative Future Retail Floorspace Potential (Cumulative) - <u>Adjusted</u> for Vacancy & Pipeline		
Retail Goods Type	Floorspace Capacity (m2)	
	2026	2029
Ennis Catchment		
Convenience Goods	2,604	3,897
Comparison Goods (Non-Bulky)	2,707	5,924
Comparison Goods (Bulky)	1,481	3,326
Total Retail Floorspace Potential	6,792	13,147
Kilrush Catchment		
Convenience Goods	1,444	2,114
Comparison Goods (Non-Bulky)	1,460	2,274
Comparison Goods (Bulky)	414	751
Total Retail Floorspace Potential	3,319	5,138

Ennistymon Catchment		
Convenience Goods	3,688	4,184
Comparison Goods (Non-Bulky)	623	882
Comparison Goods (Bulky)	134	368
Total Retail Floorspace Potential	4,444	5,434
Scariff Catchment		
Convenience Goods	1,192	1,385
Comparison Goods (Non-Bulky)	94	270
Comparison Goods (Bulky)	-1,219	-1,155
Total Retail Floorspace Potential	66	500
Limerick Catchment		
Convenience Goods	15,973	24,884
Comparison Goods (Non-Bulky)	24,758	54,486
Comparison Goods (Bulky)	-6,026	2,491
Total Retail Floorspace Potential	34,705	81,862

6.16 Final Future Floorspace Potential

Having identified the quantum of floorspace capacity in each catchment area (Table 6.15), having also considered the utilisation of observed vacancy as a mitigating factor to those requirements (Table 6.18), and finally, having adjusted with regards to assumed realisable consented floorspace in the planning pipeline (Table 6.22), the final adjusted future floorspace potential for each catchment area can be set out.

6.16.1 Allocation within the Limerick Catchment Retail Area

Specific consideration of the identified requirements for the Limerick Retail Catchment area required undertaking in order to account for the relevant boundaries between both Local Authority areas, namely the Catchment's shared area across Limerick City and County and County Clare.

An allocation between both jurisdictions was agreed by both local authorities, reflecting a review of four key factors: *population share*, *retail hierarchy*, *retail mix* and *land-use/capacity* across the catchment.

As a result, it was agreed that 75% of the Limerick Catchment's identified and adjusted future floorspace potential to 2029 would be allocated to Limerick City and County, with 25% of total catchment requirements allocated to County Clare.

Sub-allocations of the resulting floorspace quanta were then developed on the basis of the three retail category types and between the Metro and non-Metro sections of the Limerick Catchment area.

For the section of the Limerick Catchment covering the Metro (in County Clare), an allocation of 90% of the resulting convenience retail potential was assigned, with 10% to the section covering the non-Metro areas of Clare, the Catchment ‘remainder’ (outside of the Metro area in Clare).

Similarly, 90% of comparison non-bulky was assigned to Metro, with 10% to the remainder, and finally, an even 50% assignment was given to comparison bulky.

These sub-allocations again reflected the review of the four factors set out above.

6.16.2 Final (Allocated) Future Floorspace Potential

Accounting for the agreed allocations, the final future floorspace potentials per retail category have been set out in Table 6.23 below in terms of summary residual capacity – adjusted for vacancy and assumed realisable consented development as of the time of drafting.

Table 6.23: Final Future Retail Floorspace Potential (Cumulative) - Adjusted for Vacancy & Pipeline

Final Future Retail Floorspace Potential (Cumulative) - <u>Adjusted</u> for Vacancy & Pipeline		
Retail Goods Type	Floorspace Capacity (m2)	
	2026	2029
[1] Limerick Catchment Metro - Clare Portion		
Convenience Goods	3,594	5,599
Comparison Goods (Non-Bulky)	5,570	12,259
Comparison Goods (Bulky)	-753	311
Total Retail Floorspace Potential	8,411	18,170
[2] Limerick Catchment Remainder - Clare Portion		
Convenience Goods	399	622
Comparison Goods (Non-Bulky)	619	1,362
Comparison Goods (Bulky)	-753	311
Total Retail Floorspace Potential	265	2,296
[3] Ennis Catchment		
Convenience Goods	2,604	3,897
Comparison Goods (Non-Bulky)	2,707	5,924
Comparison Goods (Bulky)	1,481	3,326
Total Retail Floorspace Potential	6,792	13,147
[4] Kilrush Catchment		
Convenience Goods	1,444	2,114
Comparison Goods (Non-Bulky)	1,460	2,274
Comparison Goods (Bulky)	414	751
Total Retail Floorspace Potential	3,319	5,138
[5] Ennistymon Catchment		
Convenience Goods	3,688	4,184
Comparison Goods (Non-Bulky)	623	882
Comparison Goods (Bulky)	134	368
Total Retail Floorspace Potential	4,444	5,434
[6] Scariff Catchment		
Convenience Goods	1,192	1,385
Comparison Goods (Non-Bulky)	94	270
Comparison Goods (Bulky)	-1,219	-1,155
Total Retail Floorspace Potential	66	500
[1]+[2]+[3]+[4]+[5]+[6] County Clare Total (excl. Limerick Catchment portion in Limerick)		
Convenience Goods	12,921	17,801
Comparison Goods (Non-Bulky)	11,073	22,971
Comparison Goods (Bulky)	-697	3,912
Total <u>County</u> Retail Floorspace Potential	23,298	44,684

7 Retail Planning Policies and Criteria for Assessment of Retail Development

This chapter draws upon the qualitative and quantitative analysis to provide policy direction and guidance to be included in the Clare County Council Development Plan 2023-2029. The Retail Hierarchy identified in section 7.1 informs the direction of retail scale and type in the county. The Core Retail Areas for each of the settlements within the Retail Hierarchy are mapped, Opportunity Sites are identified. This analysis has utilised relevant development plans and Local Area Plans to identify opportunity sites.

7.1 Retail Settlement Hierarchy

As outlined in Section 2, the purpose of the Retail Hierarchy is to indicate the level and form of retailing activity appropriate to the various urban centres of the county to enable the Council to protect each centre's overall vitality and viability whilst allowing each centre to perform its overall function within the county's settlement hierarchy.

The retail hierarchy for County Clare 2023-2029 is set out in Table 7-1:

Table 7.1: Clare Retail Hierarchy

Tier	Level	Location	Status
Tier 2 - Major Town Centres	-	Ennis	Key Town/County Town
Tier 3 - Town Centres	Level 1	Shannon	Metropolitan town
	Level 2	Kilrush	Service Town
		Ennistymon/Lahinch	Service Town
		Scariff/Tuamgraney	Service Town
Tier 4 Neighbourhood and village centres	Level 1	Kilalloe	Small Town
		Sixmilebridge	Small Town
		Newmarket-on-fergus	Small Town
		Miltown-Malbay	Small Town
		Kilkee	Small Town
	Level 2	Tulla	Village Centre
		Corofin	Village Centre
		Lisdoonvarna	Village Centre
		Kildysart	Village Centre
		Ballyvaughan	Village Centre
Tier 5 – Local/Corner Shops	-	Smaller villages/crossroads – rural shops (post offices, creameries, public houses, filling stations, etc.)	Local/Corner Shops

7.2 Core Retail Areas and Retail Opportunity Sites

The Retail Planning Guidelines (2012) define retail area as “that part of a town centre which is primarily devoted to shopping”. Core retail areas contain the primary retail streets of a centre where the main concentration of retail activity takes places. New retail development will be preferred and encouraged within the core retail areas, with an emphasis on the primary retail streets in particular to be retained as the key locations for retail development.

In accordance with the Retail Planning Guidelines (2012) it is also necessary to identify ‘Opportunity Sites’ which are considered appropriate for future retail development within or adjacent to the core and secondary retail areas within the identified settlements. The identification of appropriate opportunity sites will further enhance and maintain the vitality and viability of the main retail centres of the county should applications for retail development materialise in the future.

Furthermore, these sites should be examined and addressed in a sequential approach before any site further from the retail core is proposed for consideration. In keeping with the sequential approach, a focus on encouraging retail occupancy of vacant premises located within the retail core should be prioritised in the first instance. Opportunity sites may or may not be necessary in some settlements depending on results from the floorspace survey which will indicate where additional retail development needs to occur.

7.2.1 Ennis

Ennis town centre is shown below in figure 7-1. The town centre has two core retail areas. 13 no. opportunity sites were identified in Ennis for potential retail redevelopment. Table 7.2 provides a brief site appraisal for each opportunity site. Occupying, adapting and/or redeveloping vacant and derelict premises within the core area is the preferred and optimal solution for accommodating future retail development in Ennis.

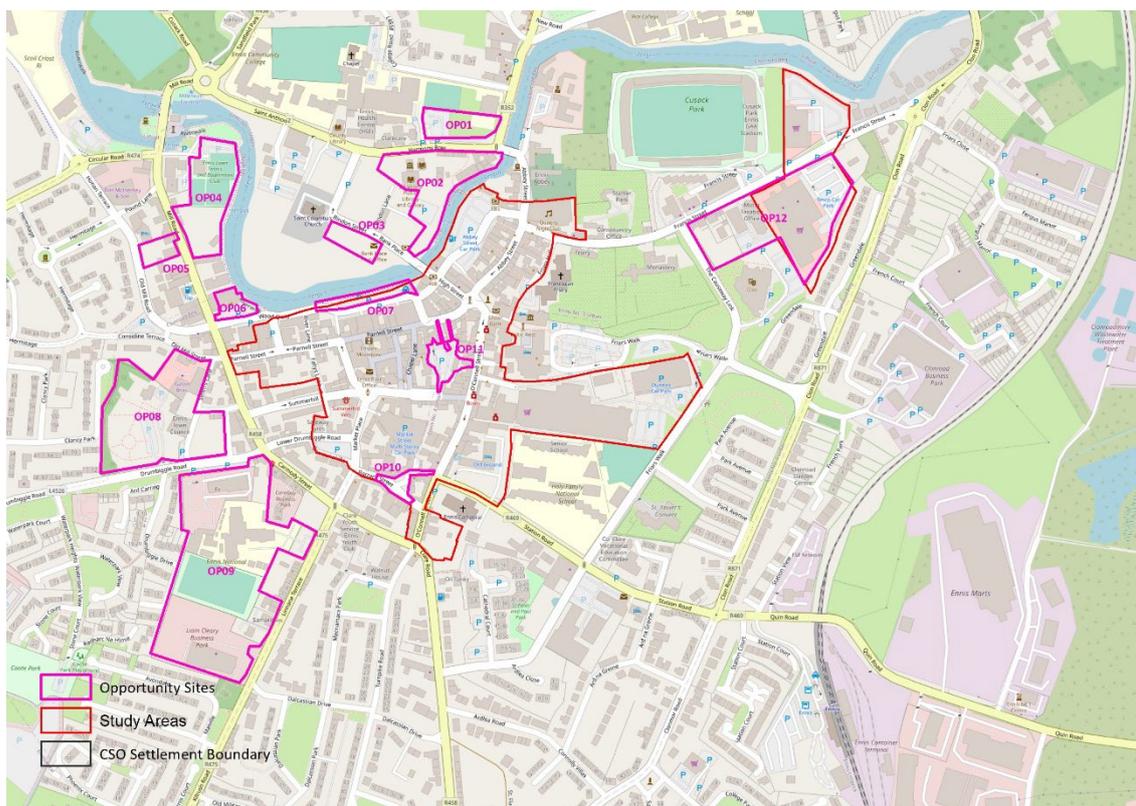


Figure 7-1: Ennis Opportunity Sites

Table 7.2: Ennis Opportunity Sites Development Potential

Settlement	Opportunity site	Development Potential
Ennis	OP1 Coláiste Muire Grounds, Harmony Row	This opportunity site is zoned for mixed use and has the potential to accommodate retail but is considered most suitable for the provision of parking.
	OP2 Riverside Site, Harmony Row and Bank Place	This site presents a major opportunity to provide a flagship waterfront development of outstanding design and quality to diversify and strengthen the mix of activities in the town centre. This site can accommodate mixed use, civic, commercial and business/office developments in addition to riverside amenity space and flood defence uses.
	OP3 Analogue Building and adjoining Infill Site, Bank Place	The site can accommodate a range of commercial, mixed use or civic uses and it is essential that future developments on OP3 incorporate high quality, dual-frontage design that creates a lively frontage to the Post Office Field, the River Fergus and Bank Place.

Settlement	Opportunity site	Development Potential
	OP4 Waterville House and adjoining site, Mill Road/Cornmarket Street	This opportunity site is zoned Mixed Use and offers the unique potential for the redevelopment of the Ennis Lawn Tennis and Badminton Club grounds, subject to the club wishing to relocate to another suitable location. The site has the potential to accommodate a range of uses including offices, hotel/guest accommodation and other uses normally associated with the town centre.
	OP5 Former Western Garages and adjoining Old Cornstore	Opportunity exists to redevelop this site for a mix of uses such as commercial or retail activity, offices, crèche, cookery school etc. This site is zoned Mixed Use and such uses would capitalise on the location of the site in close proximity to the town centre.
	OP6 West Clare Railway Greenway Trail Head, Woodquay	This site is zoned Mixed Use and is identified for the development of a high quality trail head for the West Clare Railway Greenway. It is conveniently located in close proximity to the town centre, accommodation providers and parking facilities. Trail head facilities can include bike hire, repair and accessories shops.
	OP7 Riverside, Parnell Street Car park	The aim for this opportunity site is to harness the potential offered by the river setting to provide a unique amenity space in the heart of the town centre which is easily accessible. This will create additional footfall in the area.
	OP8 Waterpark House and Áras Uí Choicláin, Drumbiggle	The redevelopment of this large scale site in conjunction with the former Boys National School and adjoining lands presents an opportunity to regenerate the west side of Ennis. The site is zoned mixed use.
	OP9 Former Boys National School and Adjoining Site, Kilrush Road	This significant brownfield site is in a strategic location, ideally positioned to accommodate the need for the allocated quantum of additional convenience and non-bulky comparison goods floor space directly adjoining the existing town centre.
	OP10 Barrack Square and Old Barrack Street	This area has begun to develop into a 'café quarter' in the heart of the town centre. The aim is to create a high quality civic space, based on the principles of universal design, where people meet, relax and enjoy the ambiance. Future

Settlement	Opportunity site	Development Potential
		development proposals for this area must ensure that access to Westby Lane and private properties in the vicinity is retained. The site is zoned mixed use and future development proposals must complement the rich built heritage of the area.
	OP11 Ennis Community Center, Lysaght's Car park and former Moran's Premises	Significant potential exists to accommodate retail and commercial uses in this area together with enhanced public realm and civic spaces. Connectivity to the various streets in the vicinity of this site including a new connection to O'Connell Street will be essential to delivering the sites full potential.
	OP12 Francis Street and The Causeway	The site is zoned Mixed Use and can accommodate a range of uses including commercial, retail, office, residential, hospitality or cultural uses.
	OP13 Clare Marts, Quin Road	This opportunity site on the edge of the town centre has been zoned for mixed use development. It is particularly suited to facilitate the relocation of Cusack Park should the need for a new stadium arise. The future development of this site will be dependent upon the relocation of the existing Mart.

7.2.2 Shannon

Figure 7.2 highlights Shannon’s settlement boundary as defined by the CSO. The town settlement is adjacent to the Shannon Free Zone and Shannon International Airport. The opportunity for Shannon is considered to focus on the area around the Shannon Town Centre and supporting the provision of a more urban streetscape that helps to provide for more intensive development in the town centre

7.2.3 Kilrush

Kilrush settlement boundary is outlined in figure 7.3. Within Kilrush and Cappa, 9 no. opportunity sites have been identified as being suitable for retail development. Table 7.4 elaborates on each site’s potential. The level of vacancy throughout Kilrush and within the core retail area presents a variety of opportunities to reuse existing sites and develop new sites for retail development.

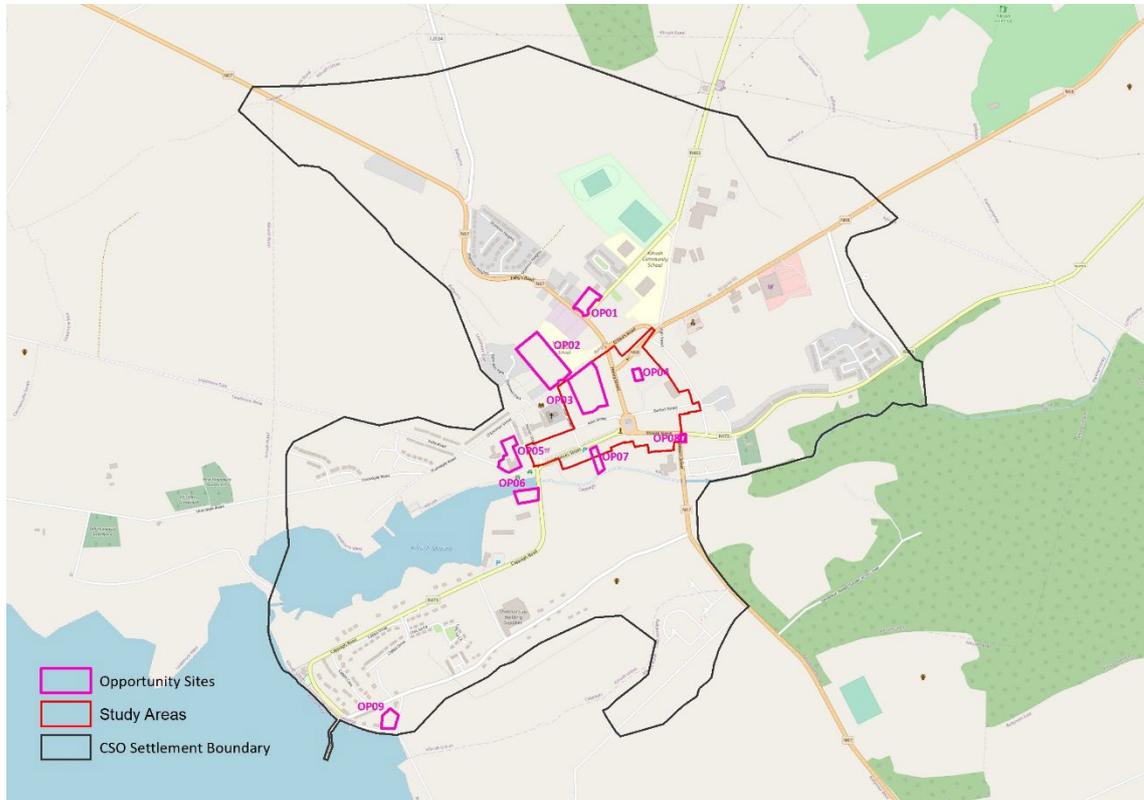


Figure 7-2: Kilrush West opportunity sites

Table 7.3: Kilrush Opportunity Sites Development Potential

Settlement	Opportunity site	Development Potential
Kilrush	OP1 Former Creamery Site	There are a number of existing uses on the site, however the nature of these uses are transient and short-term in nature on parts of the site. The site is zoned Commercial and redevelopment of

Settlement	Opportunity site	Development Potential
		the subject site in a comprehensive overall site design would contribute to the current townscape.
	OP2 Former Convent Building	The Mixed Use zoning on this landmark site facilitates a myriad of potential uses such as retail, administration, hospitality, community uses such as education and/or third level uses.
	OP3 O Dea's Field, Back Road	The zoning on the site is Mixed Use which, combined with the unique opportunity of a green field site in the town centre, offers a wide range of potential uses.
	OP4 Former Tile/Bathroom Showroom, Place de Plouzane	This is an under-utilised structure in Kilrush. The subject structure is zoned Mixed Use and is suitable for a diverse range of uses including a cinema, indoor children's activity centre, retail and hospitality uses.
	OP5 Quay Mills	The sensitive and successful redevelopment of the protected former mill building RPS 858 in the town centre of Kilrush provides an ideal opportunity for uses such as financial services, the service industry, administration offices, hospitality and a wide range of other uses
	OP6 Former Harbour Restaurant	The mixed-use zoning on the site facilitates a wide range of uses including retail. In the context of its location, it may be more suited to various uses within the hospitality sector (including a restaurant), hostel-style development to facilitate school tours, waterbased activity centre and marine-related development that would add to the tourism product.
	OP7 Former Cinema, Frances Street	The former cinema building is vacant and offers an opportunity for town centre redevelopment. In the event that this building is not reinstated to its former use as a cinema, other opportunities for development could include primary and secondary uses such as retail, commercial/office space and residential uses along with a wide range of other uses.
	OP8 Former Mace Shop (Junction of Moore Street/Stewart Street)	The former 'Mace' shop on the corner of the Moore Street/Stewart Street junction offers an opportunity for town centre redevelopment of this key site, which could include primary and

Settlement	Opportunity site	Development Potential
		secondary uses such as retail, commercial/office space and residential uses.
	OP9 Cappa Corner	The Mixed Use zoning offers a variety of options in relation to possible land uses. Situated in Cappa, development at this location would enhance the seaside village character of the area and increase the range of services/amenities available to local residents and visitors.

7.2.4 Ennistymon

The settlement of Ennistymon has a number of identified vacant premises which will provide for ample opportunity for new uses – through normal uptake. Consequently, there are no targeted opportunity sites identified at this time, however, Clare County Council will consider and review sites on an ongoing basis which may provide for larger considered opportunity to address retail needs.

7.2.5 Scariff

Scariff town centre is shown on figure 7.3. There are 4 opportunity sites identified as potential retail development sites. Table 7.4 outlines each site development description.

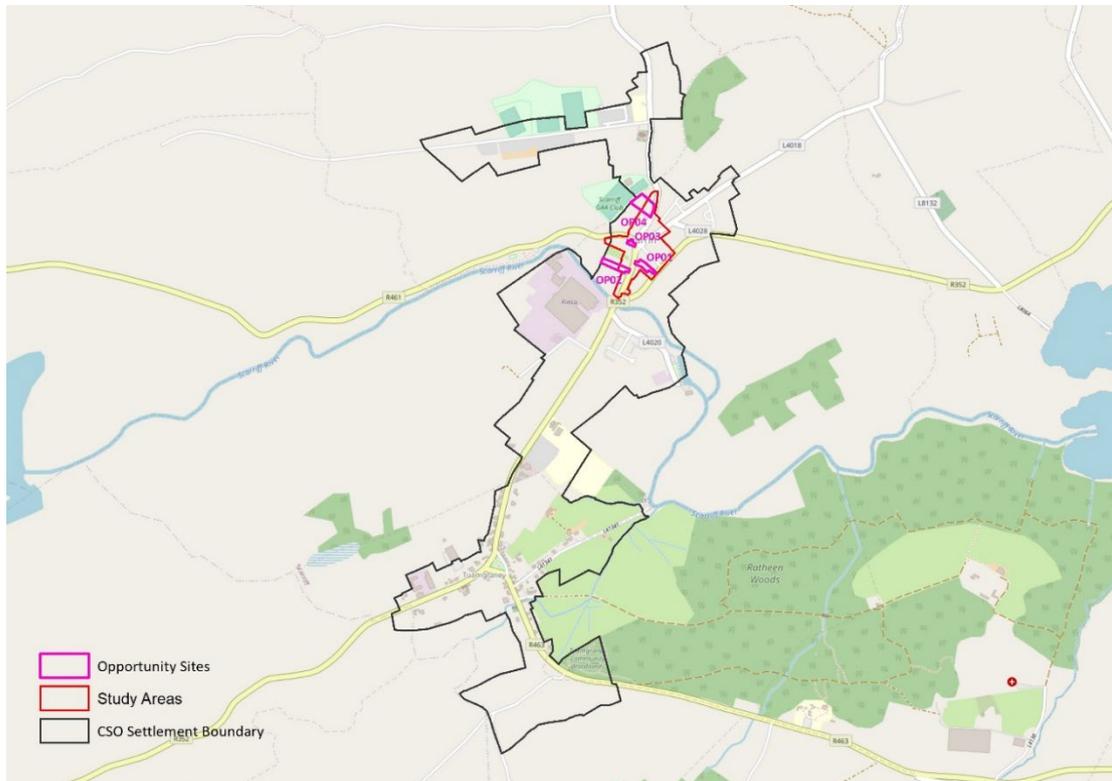


Figure 7-3: Scariff Opportunity Sites

Table 7.4: Scariff Opportunity Sites Development Potential

Settlement	Opportunity site	Development Potential
Scariff	OP1 Former Clare Lakelands Hotel and Adjacent Lands	This site comprises the former Clare Lakelands Hotel (Scariff Court Hotel), which is currently vacant, and some adjacent properties in separate ownership. The site offers the potential for refurbishment of the existing hotel and expansion of other town centre uses.
	OP2 Former Astor Cinema	The site/building comprises the former Astor cinema which is now vacant and unoccupied. This building has a rich history and heritage and has potential to be used for a range of uses given its mixed use zoning and location within the town centre.
	OP3 O'Shea's Shop, Main Street	This site consists of a two storey structure opening onto Main Street with a rear access to the Feakle Road. It had commercial use and has a fine traditional shopfront which adds value to the property and the public realm of Scariff and which should be retained in any refurbishment. The site is ideally suited for retail use in this service town.
	OP4 Mixed Use Lands at Church Street	This mixed use site has an open boundary to Church Street which is flanked by currently unoccupied houses. The sizeable gardens to the rear of the houses and the central open site combine to create potential for a significant infill site, suitable for a mix of uses.

7.3 Planning Policies, Objectives and Criteria for Assessment of Retail Development

7.3.1 County Clare

In order to shape and guide retailing in the three study areas, a number of retail objectives have been developed. In formulating and adhering to these objectives, Clare County Council will look to ensure that the development of all future retail floorspace is carried out in accordance with the requirements of the Retail Planning Guidelines. In addition, these objectives can be seen to form a single integrated and coherent strategic policy framework (with Limerick City & County Council) which will ensure that all development within the two Counties is carried out in keeping with the ideals of sustainable development.

The objectives outlined below have built on those of the preceding Retail Strategy and have been created with the aim of supporting the expansion of the retail offering of County Clare and MASP in a sustainable manner. They have been formulated to:

- I. Ensure that County Clare and MASP area possesses a clear policy framework that will inform both the conception and assessment of retail development proposals and help to guarantee that the strategic and local convenience and comparison retailing needs of the County are met;
- II. Maintain, and where possible, enhance the existing competitiveness of retail in the main settlements by facilitating the development of additional retail floorspace where it can be clearly established that such development will result in tangible improvements to the retail offering of the County/MASP area;
- III. Acknowledge the importance of the main settlements in providing a wide range of both convenience and comparison shopping in locations close to centres of population;
- IV. Acknowledge the importance of service settlements, villages, rural serviced settlements and hinterlands in suburban and rural locations in meeting local shopping needs. To encourage the improvement to the designs of local retail centres in suburban areas and rural villages, including the provision of facilities in the public realm;
- V. Encourage reductions in floorspace vacancy, taking account of suitability, obsolescence, and the identification of alternative uses for existing vacant floorspace within the urban centres of the County;
- VI. Encourage and facilitate the re-use and regeneration of derelict land and buildings for retail uses, with due cognisance to the Sequential Approach as indicated in the Retail Planning Guidelines;
- VII. Address leakage of retail expenditure from the County to competing centres by providing the means to strengthen the range and quality of its retail offer; and,
- VIII. Engage with the relevant stakeholders and incentivise to ensure that the environmental attractiveness of town/local centres is enhanced.

7.3.1.1 *General Strategy*

General retail planning objectives for the County and MASP area are:

Objective CCC01: It is the Council's objective to ensure that all retail development permitted accords with the relevant requirements and criteria as established within the Retail Planning Guidelines for Planning Authorities 2012 and the Clare County Retail Strategy 2023-2029

Objective CCC02: When assessing retail planning applications, it will be the objective of the Council to have regard to the findings of the capacity assessment contained in the Clare Retail Strategy 2023-2029, including the ability to counteract expenditure leakage. The onus will be on any applicant to demonstrate in a Retail Impact Assessment that the proposed floorspace is appropriate having regard to the quantum of floorspace required within that specific urban centre or settlement, in addition to evidencing all other relevant variables, as specified within the Retail Planning Guidelines.

Objective CCC03: It is an objective of the Council that retail development should support the achievement of national planning policies which seek to develop towns of sufficient scale and quality to compete internationally and to be drivers of national and regional growth, investment and prosperity. Furthermore, national policy seeks to regenerate and

rejuvenate towns and villages of all types and scale as environmental assets, that can accommodate changing roles and functions, increased residential population and employment.

Objective CCC04: The Council shall promote and protect the core retail areas of the main settlements within the county as the preferred locations for retail development. This objective aims to protect the existing vitality and service provision of the town centres by preventing the development of retail enterprises in inappropriate locations or at a scale which would have a negative impact on retail competition within the County.

Objective CCC05: In accordance with the Retail Planning Guidelines (2012), there shall be a presumption against retail developments on edge of centre sites or out of town centre sites. Such proposals will only be considered when it has been clearly demonstrated that all viable, available and suitable sites in the core retail area have been fully investigated and considered in accordance with the Retail Planning Guidelines and in particular the sequential test.

Objective CCC06: It is the objective of the Council to permit retail development within the town centres of a size and scale which is appropriate to the level of the settlement.

Objective CCC07: The Council will encourage the consolidation of other non-retail-based services within town centres, utilising existing vacant retail floorspace where necessary. This will aid in enhancing the vitality of town centres, encouraging them to maintain their role as employment locations in addition to reducing the proportion of vacant floorspace and recognising the value which non-retail uses can contribute to the local economy through the provision of employment and general economic benefit.

Objective CCC08: To encourage and facilitate the preservation and enhancement of the retail role of smaller villages and centres around the County.

Objective CCC09: The council will promote retail floorspace at ground level on primary retail streets within the core retail area where this would enhance the vitality and viability of these streets. Exceptions can be made where the proposed development clearly enhances the vibrancy and attractiveness of the area.

Objective CCC10: It is an objective of the Council to ensure new retail development would not (either by themselves or cumulatively with other developments) negatively impact the vitality and viability of existing retail centres within the County and MASP.

Objective CCC11: It is an objective of the Council to introduce measures to improve the accessibility of town centres by developing a safe pedestrian and cyclist friendly environment, which encourages a modal shift away from the private car.

Objective CCC12: The Council shall promote the utilisation of vacant commercial buildings in town and village centre locations as a preferred location for new retail investment. The Council shall promote an imaginative and practical approach to unit expansion and amalgamation to address modern retail requirements. Where no viable retail use can be sustained, alternative uses will be assessed on their own merits.

Objective CCC13: The Council will encourage alternative, short or interim measures to improve the visual appearance of vacant or derelict properties to enhance the overall streetscape. Measures include the use of attractive window graphics, shutter covers and hoardings.

Objective CCC14: The Council shall require that applications for new supermarkets on Neighbourhood Centre sites shall be accompanied by a Retail Impact Assessment.

Objective CCC15: Proposals for new supermarket developments in Neighbourhood centre sites should support the sustainable upgrade of neighbourhood centres and facilities and demonstrate that they facilitate improved access to public transport and/or cycling and walking for their catchment in accordance with the Retail Policy Guidelines.

Objective CCC16: Develop a 'Shopfront Improvement Scheme' to improve the design, quality and coherence of shop signage for all town centres, though the provision of guidance and grant funding enable owners to make improvements to their buildings/shopfronts.

Objective CCC17: Support retailers in developing online service offer, consumer delivery strategies, collection/distribution hubs and click and collect capacity.

Objective CCC18: The Council will encourage 'living over the shop' whereby the upper storeys of buildings have a residential function with the ground floor used for commercial or retail purpose.

Objective CCC19: The Council will support and promote the tourism potential of Shannon and Bunratty by facilitating and enhancing the expansion of the existing tourism offer and identifying opportunities that will promote visitor experiences.

7.3.1.2 *Ennis Strategy*

Objective EN01: Support and enhance Ennis as the primary retail centre in County Clare in accordance with the objectives of the National Planning Framework and Regional Spatial and Economic Strategy for the Southern Region.

Objective EN02: To protect and enhance the amenities of the town centre and ensuring that retail floorspace is developed in a sustainable manner that complements the improvement of the town overall.

Objective EN03: To focus on regenerating the town centre and main street areas with a view to creating more attractive, desirable places that people want to live and spend time in, for work, shopping or recreational purposes.

Objective EN04: Ensure that retail proposals will enhance the vitality and viability of Ennis. The sequential approach to retail development set out in the "Retail Planning – Guidelines for Planning Authorities, 2012" will be strictly enforced, with a priority to town centre.

Objective EN05: To continue to support the retail core area as a compact and attractive town centre with a strong retail sector with a particularly strong reputation for comparison goods.

Objective EN06: To promote Ennis as a compact, attractive and walkable urban core having regard to '10 min town' objectives contained within the plan.

Objective EN07: To encourage the reuse of vacant buildings or under-utilised sites throughout the town and promote the development of brownfield sites.

Objective EN08: Encourage and support investment and improvement in the public realm (new attractive planting, resurfacing, street furniture and traffic calming) via funding granted under the URDF.

Objective EN09: To support the diversity of non-retail uses at street level where such uses attract customers, that complement the vitality, vibrancy and activity and bring linked trips to the town centre.

Objective EN10: Promote Ennis' extensive bulky goods offering by allowing for an edge of centre retail development which will support bulky comparison retailing within the town and address leakages to other nearby settlements.

Objective EN11: Continue to support the established festivals and events that take place within Ennis and consider opportunities for further events.

Objective EN12: Support a 'Shopfront Improvement Scheme' to improve the design and quality of shop signage throughout the town centre, through the provision of guidance and grant funding that enable owners to make improvements to their buildings/shopfronts.

Objective EN13: Support the delivery of Ennis 2040 Economic and Spatial Strategy and work with Ennis 2040 Designated Activity Company to deliver on the strategic objectives and guiding principle of the strategy.

Objective EN14: Consider removing the car parking at Lysaght car park and introducing a civic space in its place off Lower Market Street. This may increase the appeal for occupation of some of the vacant buildings in the vicinity of the car park site, including Chapel Lane.

Objective EN15: Support the Ennis Niche Destination Plan.

Objective EN16: Seek to implement the Strategic Objectives and Guiding Principles set out in Ennis 2040 Economic and Spatial Plan

Objective EN17: Support the work of the Ennis 2040 Designated Activity Company, tasked with the delivery of projects arising from the Ennis 2040 strategy.

7.3.1.3 Shannon (MASP) area strategy

Objective MASP01: Shannon

- Support the continuing improvement of retail facilities in Shannon Town Centre through the delivery of the adopted Shannon Town Centre Masterplan ;
- To improve on and enhance the vitality and viability of the town centre and increase its competitiveness with other retail destinations.
- To support opportunities for brownfield redevelopment to support mixed-use sustainable urban development
- In areas adjacent/contiguous to the core retail area to support the diversity of non-retail uses at street level where such uses attract customers, that complement the vitality, vibrancy and activity and bring linked trips to the town centre.
- Maintain the vitality and viability of the Shannon Town Centre by consolidating investment in the shopping centre
- Encourage and facilitate the reuse of vacant units/sites throughout the town and shopping centre
- Support the delivery of the Shannon Town Centre Masterplan to create a strengthened viable and vibrant town centre supporting a quality, varied retail offer with improved physical appearance, connectivity and the development of a 'streetscape'.

- Support the planned N19 upgrade which will improve connectivity to Shannon International Airport.
- Support the delivery of the objectives for Shannon set out in the Limerick-Shannon Metropolitan Area Transport Strategy.
- Support the work of the Shannon Chamber of Commerce.
- To work with key stakeholders within the Shannon area including Shannon Commercial Properties and Shannon International Airport to deliver on the ambitions for Shannon as set out in the Draft Clare County Development Plan 2023-2029
- Promote the tourism potential of both Shannon and Bunratty by enhancing the expansion of the existing tourism offer and identifying opportunities that will promote visitor experiences and facilitate the delivery of sustainable tourism-related retail developments and initiatives, of appropriate scales, located within close proximity to tourist attractions.

Objective MASP02: District Centres

- The role and scale of the District Centres as primarily convenience shopping centres capable of supporting a main food shopping trip will be maintained;
- Reinvestment and regeneration of existing district centres will be supported but only provided where it does not change their role and scale;
- District Centres should remain primarily convenience goods and service centres, and should not develop into primarily comparison goods retail destinations;
- District centres should not be allowed to expand significantly above the 10,000 m² (net) size threshold set out in the Retail Planning Guidelines for Planning Authorities.
- To support opportunities for brownfield redevelopment to support mixed-use sustainable urban development for day and evening use, which include retail, residential, commercial, civic and other uses. This will ensure that a mix of uses is facilitated by a district level centre that would complement the uses of the City Centre, having regard to the principles of compact growth, consolidation and densification. Any such development considerations should account for high levels of accessibility, including pedestrian, cyclists and public transport (where feasible).

7.3.1.4 Kilrush

Objective KL01: Support the improvement of retail facilities in Kilrush Town Centre through the provision of brownfield redevelopment to support mixed-use sustainable urban development

Objective KL02: Promote rejuvenation throughout within the core retail areas by the reuse of vacant floorspace to reduce vacancy levels. Where no viable retail use can be sustained, alternative uses will be assessed on their own merits.

Objective KL03: To improve on and enhance the vitality and viability of the town centre and increase its competitiveness with other retail destinations.

Objective KL04: The settlement of Kilrush shall apply a sequential approach to all new retail in the town with a priority to town centre.

Objective KL05: Enhance the diversity of non-retail uses at street level where such uses attract customers, that complement the vitality, vibrancy and activity and bring linked trips to the town centre.

Objective KL06: Support the Kilrush Town Team across their various interest groups

Objective KL07: Support the delivery of the Kilrush Maritime Training Centre, which will contribute to the retail demand within the town.

Objective KL08: Support the DigiClare Hub within the town and the expansion of this resource into the future.

7.3.1.5 *Ennistymon*

Objective EY01: To improve on and enhance the vitality and viability of Ennistymon town centre and increase its competitiveness with other retail destinations.

Objective EY02: To encourage the reuse of vacant buildings or under-utilised sites throughout the town

Objective EY03: Develop a 'Shopfront Improvement Scheme' to improve the design and quality of shop signage throughout Ennistymon

Objective EY04: To regenerate the traditional town centre with a vision to produce more attractive, desirable places that people want to live and spend time in, for work, shopping or recreational purposes.

Objective EY05: Review and reduce wirescape within the town centre where possible, which currently serves to detract from the attractiveness of the core retail area.

Objective EY06: The settlement of Ennistymon shall apply a sequential approach to all new retail in the town with a priority to town centre.

Objective EY07: Support the delivery of the planned West Clare Railway Greenway which will pass through Ennistymon and onto Lahinch

Objective EY08: Support the Ennistymon Town Team

Objective EY09: Support the delivery of the Ennistymon Town Master plan which will identify public realm opportunities within the town that can be utilised to enhance the towns offering.

Objective EY10: Support the delivery of the planned new River Crossing which will help to address traffic congestion within the town especially at peak travel times and during the peak tourist season.

7.3.1.6 *Scariff*

Objective SF01: To protect and enhance the retail services and facilities within Scariff and ensuring that retail floorspace is developed in a sustainable manner that complements the improvement of the town overall.

Objective SF02: To maximise the potential of retail investment to improve urban infrastructure and amenities and enhance liveability and the quality of the built environment.

Objective SF03: Scariff shall apply a sequential approach to all new retail developments in the town with a priority to town centre.

Objective SF04: To promote a ‘Shopfront Improvement Scheme’ to enable owners to make improvements to their buildings/shopfronts within the retail core through grant funding, so as to continually improve design and quality of the street frontage.

Objective SF05: Support Scariff Town Team and Tidy Town Team.

7.4 Criteria for Assessment of Retail Development

In accordance with the Retail Planning Guidelines for Planning Authorities all applications for significant development should be assessed against a range of criteria as set out below.

7.4.1 The Sequential Test

All applications for retail developments at edge-of-centre or out-of-centre locations (i.e. outside of the defined core retail areas) will be subject to the sequential test. The 2012 retail planning guidelines has formulated order of priority for retail development, which is outlined below.

City and Town Centre

“The order of priority for the sequential approach is to locate retail development in the city/town centre (and district centre if appropriate), and only to allow retail development in edge-of-centre or out-of-centre locations where all other options have been exhausted”.

Edge-of-Centre Sites

“Where retail development in an edge-of-centre site is being proposed, only where the applicant can demonstrate and the planning authority is satisfied that there are no sites or potential sites including vacant units within a city or town centre or within a designated district centre that are (a) suitable (b) available and (c) viable, can that edge-of-centre site be considered”.

Out-of-Centre Sites

“Where retail development on an out-of-centre site is being proposed, only in exceptional circumstances where the applicant can demonstrate and the planning authority is satisfied that there are no sites or potential sites either within the centre of a city, town or designated district centre or on the edge of the city/town/district centre that are (a) suitable (b) available and (c) viable, can that out-of-centre site be considered”.

7.4.2 Retail Impact Assessments

Retail Impact Assessments will be required for significant retail development where due to its scale and/or location; it may impact on the vitality and viability of centres. Significant retail development in County Clare constitutes development proposals for both comparison and convenience type development of:

- greater than 1000m² of net floorspace outside of Shannon (within MASP);
- greater than 500m² in all other settlements,
- or where Clare County Council considers the development may impact on the vitality and viability of a town centre

These assessments will be prepared in accordance with the current Retail Planning Guidelines, which requires an applicant to address the following criteria and demonstrate whether or not the proposal would:

- Support the long-term strategy for city/town centres as established in the development plan, and not materially diminish the prospect of attracting private sector investment into one or more such centres;
- Have the potential to Increase employment opportunities and promote economic regeneration;
- Have the potential to increase competition within the area and thereby attract further consumers to the area;
- Respond to consumer demand for its retail offering and not diminish the range of activities and services that a centre can support;
- Cause an adverse impact on one or more centres, either singly or cumulatively with recent developments or other outstanding planning permissions (which have a realistic prospect of implementation) sufficient to undermine the quality of the centre or its wider function in the promotion and encouragement of the arts, culture, leisure, public realm function of the town centre critical to the economic and social life of the community;
- Cause an increase in the number of vacant properties in the primary retail area that is likely to persist in the long term;
- Ensure a high standard of access both by public transport, foot and private car so that the proposal is easily accessible by all sections of society; and/or
- Link effectively with an existing city/town centre so that there is likely to be commercial synergy.

7.4.3 Traffic and Transport Assessments

A Traffic and Transport Assessment (TTA) may be required for retail developments outside of town centre sites over a particular threshold (1,000m²), as set out in the *Traffic Management Guidelines 2003*, and the *Traffic Transport Assessment Guidelines 2014*.

A TTA must examine the transport impacts of a proposed development, incorporating any subsequent measures necessary to ensure roads, junctions and other transport infrastructure in the vicinity of the development are adequate to accommodate the proposed development without causing additional delays to existing and future road-based traffic. More importantly, TTA is important in demonstrating how to encourage a shift towards sustainable travel modes by those using the retail development in question.

Applicants for retail development which exceed these thresholds should consult the guidelines above prior to lodging a planning application. Where traffic and transport volumes from proposed retail developments are under the thresholds for TTA outlined above, the guidelines should be consulted in regard to the criteria for sub threshold TTA. The TTA should also address urban design impacts of proposed public and private transport proposals and also deal with delivery and monitoring regimes for the various

options. If the proposed development warrants an Environmental Impact Assessment (EIA), the transport assessment should form part of the EIAR.

7.4.3.1 *Design Quality*

The 2012 Retail Planning Guidelines are accompanied by the Retail Design Manual (April 2012). The Manual provides planning authorities, developers and designers with evidence-based quality principles to ensure that future planning for the retail sector is focussed on the creation of vibrant, quality places.

7.4.4 **Criteria for the Assessment of Different Development Types**

7.4.4.1 *Large Convenience Stores*

New large convenience stores should be located within city and town centres or within designated district centres that serve a large residential community where possible. Edge of centre locations for such developments may be appropriate where there is limited room for expansion within an existing town centre, as the urban grain of many town centres do not lend themselves to being suitable for larger form convenience stores. This is acknowledged in the Retail Planning Guidelines:

“In certain limited circumstances however, it may not be possible to bring forward suitable sites in or on the edge of a city or town centre because of the site requirements of large convenience goods stores, heritage constraints in historic towns, or because the road network does not have the capacity to accommodate additional traffic and service vehicles. In these cases, the sequential approach should be used to find the most preferable sites.”

However, any out of centre proposals for this form of retail development requires careful assessment and will need to fully satisfy compliance with the sequential test. Accessibility is also a key consideration for such developments and as such it is imperative that proposals for large convenience stores are accessible by all modes of transport including pedestrians and by public transport.

Within Limerick/Shannon MASP a retail floorspace cap of 3500m² for large convenience good stores will be applied. For County Clare excluding the Limerick/Shannon MASP a retail floorspace cap of 3,000m² for large convenience good stores will be applied. This applies to new stores as well as to extensions of existing retail units. For a large-scale proposal encompassing both convenience and comparison goods no such cap will apply. In these instances, the application drawings should clearly delineate the floorspace to be attributed to the convenience and comparison-shopping types. The balance between the convenience and comparison element of the proposed store drawings is a critical element in the assessment of the suitability of the development proposal. Where a significant element of the store is indicated to be for comparison goods, the potential impact of that element of the store on existing comparison goods stores within the catchment area will be considered in the assessment of the application.

7.4.4.2 *Retail Warehouses*

In accordance with the Retail Planning Guidelines there should be a **presumption against the further development of out of town retail parks** and a preference for sites in or adjacent to town centres to ensure the potential for linked trips and commercial

synergy. Key criteria for the assessment of retail warehouse applications include scale and design of the development, appropriate vehicular access and the quantitative need for such development.

In accordance with the Retail Planning Guidelines within County Clare the following caps on floorspace of such retail development shall be applied (gross floorspace quoted including storage and garden centres):

- *individual retail units should not be less than 700m²*
- *Individual retail units shall not be more than 6,000m² in size (gross floorspace including storage and garden centres).*

Accordingly, proposed exceptions to the 6,000 m² retail warehouse cap may be considered on the merits of individual development applications in Limerick/Shannon MASP. Any individual large-scale retail warehouse proposals in excess of 6,000m² within the Limerick/Shannon MASP must demonstrate that the proposal will:

- A. *will accommodate predominantly bulky goods under one roof, together with a range of customer facilities (e.g. restaurant, crèche), on a scale which requires a regional, if not a national, population catchment;*
- B. *is in accordance with the Planning Guidelines on Spatial Planning and National Roads in that the proposal can demonstrate that the development will not adversely affect the efficiency of the national road network and key junctions and interchanges and that it can be demonstrated that traffic volumes can be accommodated within the design assumptions for such roads, taking account of the opportunities for encouraging a modal shift towards more sustainable travel modes;*
- C. *will be served by existing or planned public transport services;*
- D. *will make adequate provision for those opting for home delivery of goods other than by private car;*
- E. *will be accompanied by a traffic impact assessment, demonstrating compliance with the above criteria; and*
- F. *will take account of the vitality/viability criteria in respect of city/town centres set out in these Guidelines and avoid the incorporation of uses and activities, as part of the development, which are more appropriate to city and town centre locations*

Furthermore, the range of goods sold shall be restricted by planning condition to bulky goods as those defined within Annex 1 of the Retail Planning Guidelines. These include but are not limited to household appliances, bulky pet products, tools and equipment for the house and garden, furniture and furnishings.

Within proposals for such retail development, the proportion of ancillary retail floorspace associated with otherwise bulky good items shall not exceed 20% of the total net retail floorspace of the unit. The planning application drawings should clearly delineate the provision of floorspace associated with each retail type so this the County Council can make an appropriate assessment.

7.4.4.3 *Factory Shops*

Factory shops, commonly located as part of or adjacent to the production facility, should be restricted by way of condition to the sale of products produced by associated factory, unless situated within the core retail area of the centre in which it is located. Proposals for individual factory shops may be appropriate, provided the scale of the shop is appropriate to its location and raises no issues in relation to the vitality and viability of nearby urban centres.

7.4.4.4 *Outlet Centres*

The Retail Planning Guidelines define outlet centres as “groups of stores retailing end-of-season or discontinued items at discounted prices and are typically located in out-of-centre locations”. The success of these centres depends on drawing customers and visitors from a wide catchment area, including tourists and as such there may be implications for existing tourist centres and established town centres.

The assessment of such retail development should focus on whether such a development is located in a strategic location to capture expenditure from a very wide catchment area.

Moreover, it is the duty of the applicant to demonstrate that the products sold will not be in competition with those currently on sale in typical town centre locations within the County.

Nonetheless, outlet centres within or immediately adjacent to a city or town centre can generate commercial synergies with the established retail outlets, thus raising the profile of the centre and enhancing aggregate turnover on retail goods and leisure activities, resulting in economic benefits for the overall area.

In accordance with the Retail Planning Guidelines, outlet centres in County Clare will not be permitted in more remote out-of-town locations.

7.4.5 *Local Shops*

Local shops play a vital role in catering for the daily needs of nearby residents or of those passing by. Primarily convenience outlets, local shops provide a readily accessible service for basic goods, often for the less mobile members of communities.

The planned development of such local shops should be encouraged in large or growing residential catchments. Such developments should be designed to a high standard and be easily accessible to all members of society.

7.4.6 *Retailing and Motor Fuel Stations*

Local shops attached to petrol filling stations are a growing sector of the retail market. However, the size of the shop associated with any petrol filling station should take account of the fact that large shops can attract additional custom, large numbers of cars can cause disruption and the preferred location for retailing is in town centres.

The Retail Planning Guidelines state that the size of such retail units should not exceed 100m². Therefore, where applications made for retail units associated with a petrol filling station are in excess of 100m² the sequential approach to retail development will apply.

7.4.7 Retailing in Small Towns and Villages

Small towns, villages, and local centres play an important role in the retail hierarchy, fulfilling the everyday needs of the communities they serve. Retail development should be focused in the centres or edge-of-centres of these small towns and villages and should complement the existing retail provision. They should also be located in areas of high accessibility to the areas they serve.

8 Conclusion

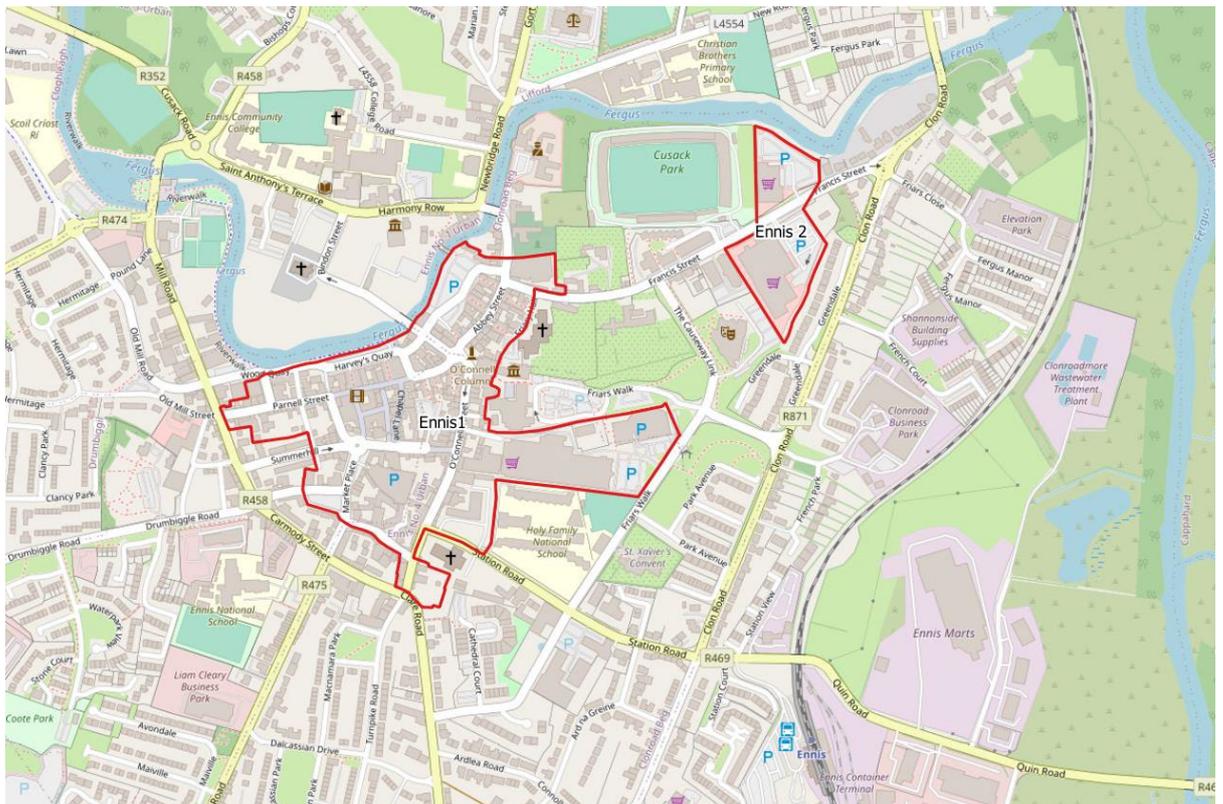
This Retail Strategy has been prepared against a backdrop of extraordinary and unique context of the COVID-19 Pandemic with unparalleled challenges for the economy and services sector in particular.

National Planning policy has long emphasised the integral link between city/town centre vibrancy and a healthy retail sector. The National Planning Framework and RSES further underline the importance of town centres as a focus for regeneration and providing desirable places for people to live, work and visit. This is supported by significant public investment in urban infrastructure and amenities. This Retail Strategy finds that while convenience retailing remains strong, there are significant challenges for the comparison retail sector in the study area. However, projected growth in expenditure for the plan period highlights that there is an opportunity for resilient places to re-position themselves to the demands of the contemporary retail market. This entails a more diverse town centre offer where a dynamic service cultural and social experiences are vital to supporting an attractive retail experience.

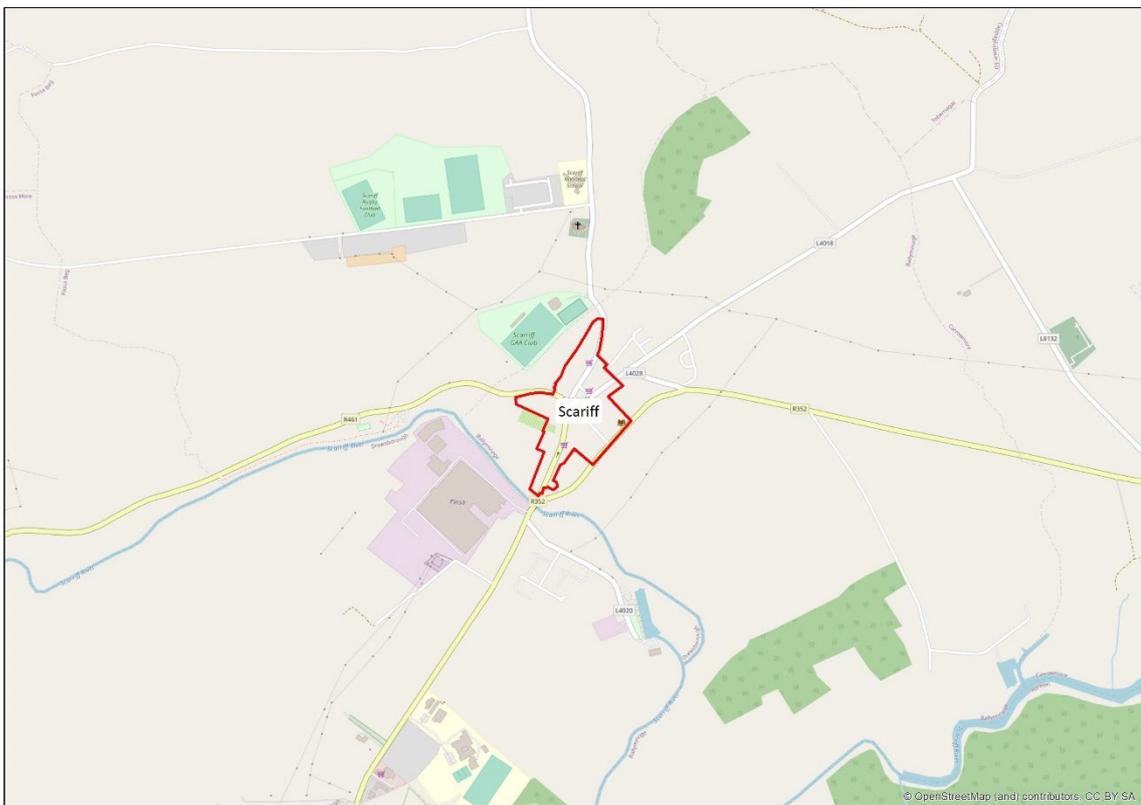
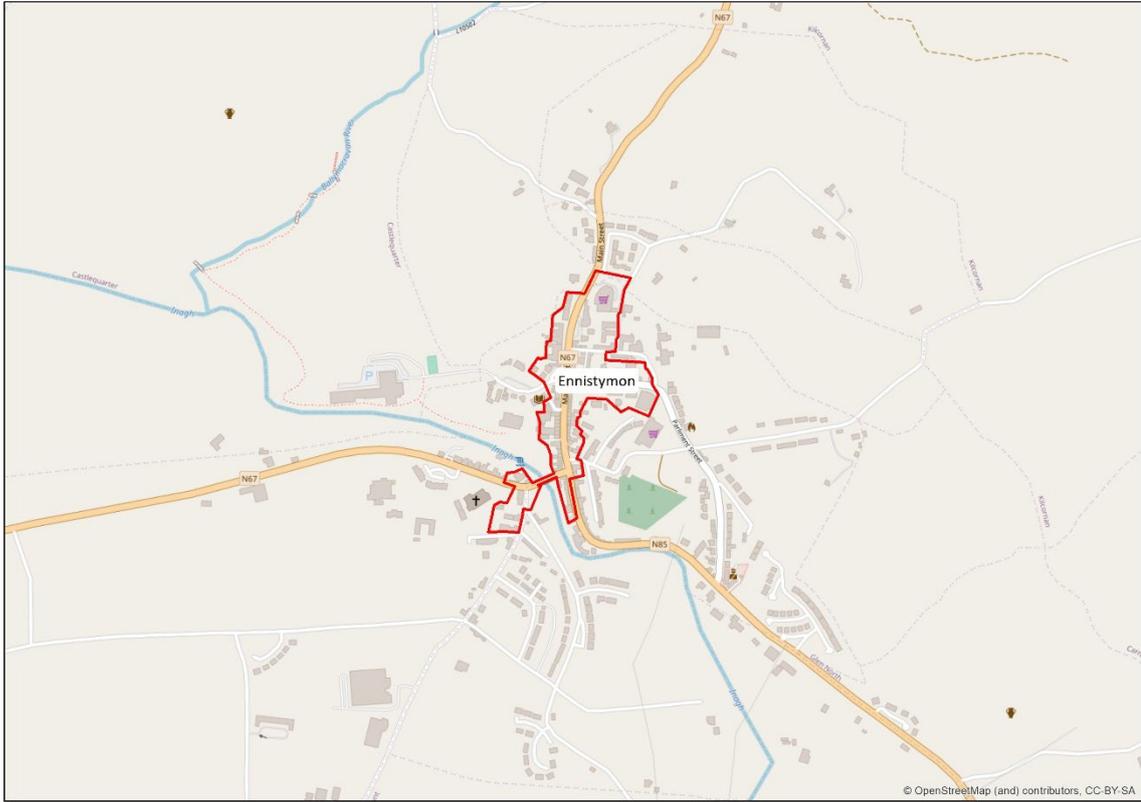
The growth in expenditure identified in this study is identified as an important opportunity to channel retail and commercial investment that reverses vacancy trends and supports regeneration of our urban areas. While the nature of retail is constantly evolving, it remains a vital part of sustainable urban centres.

A Appendix

A.1 Retail Study Areas







A.2 Main Study Areas and Additional Retail Inclusions

Clare Catchment

Main Study Areas:

- Ennis
- Shannon
- Kilrush
- Ennistymon
- Scariff

Additional Inclusions:

- Elite Business Park
- Ballycasey Craft and Design Centre
- Kilrush Business Park

A.3 Commercial Planning Pipeline Activity (As of February 2021)

Planning Reg Ref	Address	Planning Status (Feb 2021)	Proposed floorspace (SQ.M)	Retail type
18906	Dromoland Castle, Dromoland, Newmarket on Fergus, Co. Clare	Plans Granted	76	Comparison
20392	The Square, Main St, Newmarket-on-Fergus, Co Clare	Plans Granted	16	Comparison
20495	Ballyhickey, Quin, Co Clare	Plans Granted	22.68	Comparison
164	Main Street, Miltown Malbay, Co. Clare	Plans Granted	54.63	convenience
16764	Ennis Rd , Clarecastle , Co Clare	Plans Granted	100	convenience
17206	Market Place, Ennis, Co. Clare	Plans Granted	101.5	Generic
14769	Kilbreckan, Doora, Ennis, Co. Clare	Plans Granted	100	Convenience
1956	Knocksaggart, Ballynacally, Ennis, Co. Clare	Plans Granted	66	convenience
19973	Cloonbony, Miltown Malbay, Co Clare, V95 PWK1	Plans Granted	84	Convenience
19776	Junction of Chapel Street and The R462, Tulla, Co Clare	Plans Granted	232.5	Generic
19231	Braids Mill, Station Road, Old Gaol Road, Ennis, Co. Clare	Commenced	115	Generic
17223	13 Parnell Square Carpark, Ennis, Co. Clare	Commenced	180.58	comparison
1873	Station Road, Ennistymon, Co. Clare	Plans Granted	97.15	Convenience

Planning Reg Ref	Address	Planning Status (Feb 2021)	Proposed floorspace (SQ.M)	Retail type
16573	Clooneyogan South , Moy , Co Clare	Plans Granted	103.34	Convenience
20296	Main Street, Lahinch, Co Clare	Plans Granted	86.5	generic
17764	39 Moore Street, Kilrush, Co. Clare	Plans Granted	29.9	Generic
19241	Kilmacduane West, Cooraclare, Co. Clare	Plans Granted	105	convenience
18212	Gortatogher, Parteen, Co. Clare	Commenced	606.98	Comparison/bulky
19376	Knockballynameath, Corbally, Co. Clare	Commenced	192.2	convenience

A.4 Survey Questionnaire

Section	Question #	Function	Questions	
Section 1	Respondent Information	1	Age	
			What age group are you in?	
			15-24 years old	
			25-34 years old	
			35-44 years old	
			45-54 years old	
			55-64 years old	
			64-74 years old	
			75+ years old	
			No Response	
	2	Location	Where do you currently live (please state the (closest) town/village name only)?	
			Town or Village name and County	
			No Response	
Section 2	Influence of COVID-19	3	frequency	
			How has COVID-19 regulations changed your PHYSICAL shopping habits?	
			More shopping trips (smaller basket, less organised)	
			Less shopping trips (larger basket, more organised)	
			No change	
			No response	
			4	frequency
			How has COVID-19 regulations changed your ONLINE shopping habits?	
			More online shopping	
			Less online shopping	
			No change	
			No response	
			5	Location
			How has COVID-19 regulations influenced where you do your shopping?	
			I now shop closer to home, even though I have less offerings/services	
			I shop close to home because I have all the offerings/services nearby	
			I have to shop farther from home for the offerings/services I need regularly	
	No change			
	No response			
	6	Location		
	Where do you do your online shopping (due to COVID, Brexit, preference)			
	Shop more locally in County (conscious of origin and delivery time/cost)			
	Shop more locally in Ireland (conscious of origin and delivery time/cost)			
	Shop more internationally (don't mind origin or delivery time/cost)			
Section 3	7	transport	What mode of transport do you take when doing your main grocery shopping?	

Section	Question #	Function	Questions		
		Main Grocery Shopping			
		Bus			
		Car			
		Cycling			
		Delivery			
		On Foot			
		Taxi			
		Other			
		No Response			
		Top-up Shopping			
		Bus			
		Car			
		Cycling			
		Delivery			
		On Foot			
		Taxi			
		Other			
		No Response			
		Clothing & Footwear			
		Bus			
		Car			
		Cycling			
		Delivery			
		On Foot			
		Taxi			
		Other			
		No Response			
		Bulky Household Goods			
		Bus			
		Car			
		Cycling			
		Delivery			
		On Foot			
		Taxi			
		Other			
				No Response	
Section 4	Main Grocery Shopping	8	Location		
			Where do you do your main grocery shopping? (Name a town centre, district centre, shopping centre, or other retail location).		
			Name of 2Town centre, district centre, shopping centre, or other retail location		
		No Response			

Section	Question #	Function	Questions
	9	frequency	How often do you do your main food/grocery shopping?
			More than once per week
			Once per week
			3 times per month
			every 2 weeks
			Once per month
			No Response
	10	satisfaction	When shopping – is the experience/leisure aspect and services available important to you? (i.e. hairdressers, coffee shops, restaurants)
			Very important
			Important
			Neutral
			Not important
			No Response
	11	attraction	Why you do your main grocery shopping in this location?
			Customer Loyalty
			Accessibility (Convenient access, quality of roads, accessibility for pedestrians/cyclists, accessibility for disabled patrons)
			Convenience (En route or close to home or place of work/school/college)
			Choice/Variety
			Parking (Ease of parking, parking costs, proximity of parking to shops)
			Affordability (Value for money retail offerings)
			Quality
			Customer Service
			Support Local Businesses
			Availability (Range of products available)
			Brands
			Centralised location (Proximity to complementary services e.g. pharmacy, barber, butcher, etc.)
			Complimentary attractions nearby (e.g. cinema, kids play area, arcade, ten-pin bowling, ice rink, public open space, etc.)
			Atmosphere (Pleasant shopping environment)
			Low Traffic
			Delivery Options
			Other
			No Response
	12	expenditure	How much did you spend on your last grocery shopping trip for your main grocery purchases?
			0-25 euro
			25-50 euro
			50-100 euro
			100-200 euro
			200-300 euro
			300+ euro

Section	Question #	Function	Questions	
			No Response	
	13	specific retailer	Which grocery store(s) do you normally visit for your main grocery purchases?	
			Tesco	
			Lidl	
			Aldi	
			Supervalu	
			Iceland	
			M&S	
			Dunnes	
			Spar	
			Other	
			No Response	
	14	improvement	What element, in this location, should be improved to motivate you to shop there more often?	
			Access (road access, traffic management, safer pedestrianised/cyclist access, improved public transport links)	
			Parking (Improved access, cheaper/zero parking charges, more parking close to shops, more on street parking)	
			Large retail offerings (E.g. Penneys, Dunnes, H&M, department stores)	
			Larger grocery offerings (E.g. Tesco Superstore, Dunnes, Supervalu, etc)	
			Choice/Variety (Improved range of stores, competitive pricing)	
			Fresh produce (Improved fresh produce outlets (markets), more local produce offerings, fruit/veg/butchery/bakery)	
			Trading hours (Increased trading hours)	
			Location	
			Public amenities (Improved access for disabled patrons, more/improved WC facilities, kids care/play area, recycling facilities, seating/rest areas, etc.)	
			Specialist stores (bookstore, pharmacy, barber/salon, etc)	
		Food & Beverage offerings (Restaurants, coffee shops)		
		Food & Beverage offerings (Take-away, fast food, (delivery))		
		Leisure facilities (Cinema, arcade, ten-pin bowling, ice rink, etc.)		
		Other		
		No Response		
Section 5	Top-up Shopping	15	Location	Where do you do your top-up grocery shopping? (Name a town centre, District centre, Shopping Centre, other retail location)
				Town, village name
				No Response
		16	frequency	How often do you do your top-up grocery shopping (Milk, bread etc)
				More than once per week
				Once per week
				3 times per month
		every 2 weeks		

Section	Question #	Function	Questions	
			Once per month	
			No Response	
	17	expenditure	How much did you spend on your last top up shop?	
			0-25 euro	
			25-50 euro	
			50-100 euro	
			100-200 euro	
			200-300 euro	
			300+ euro	
			No Response	
Section 6	18	Location	Where do you go shopping for clothing and footwear (both for yourself and your household) (specify town, shopping centre or retail location that you would normally visit for these purchases)?	
			Town, village name	
			No Response	
	19	frequency	How often do go shopping for clothing and footwear?	
			As required	
			More than once per week	
			Once per week	
			3 times per month	
			every 2 weeks	
			Once per month	
			No Response	
		20	attraction	Why do you visit that location for this type of shopping?
			Customer Loyalty	
			Accessibility	
			Convenience	
			Choice/Variety	
			Parking	
			Affordability	
			Quality	
			Customer Service	
		Support Local Businesses		
		Availability		
		Brands		
		Centralised location		
		Complimentary attractions		
		Atmosphere		
		Low Traffic		
		Delivery Options		
		Other		
		No Response		

Section	Question #	Function	Questions	
	21	expenditure	How much did you spend on clothing/ footwear on your last visit?	
			0-25 euro	
			25-50 euro	
			50-100 euro	
			100-200 euro	
			200-300 euro	
			300+ euro	
			No Response	
Section 7	22	Location	Where do you go shopping for large bulky household goods? (Name a town centre, shopping centre or other retail location).	
			Town centre, district centre, shopping centre, or other retail location	
			No Response	
	Bulky Household Goods	23	frequency	How often do you go shopping for bulky household goods?
				As required
				More than once per week
				Once per week
				3 times per month
				every 2 weeks
				Once per month
				No Response
	Bulky Household Goods	24	attraction	Why do you visit this location for your bulky household goods shopping?
				Customer Loyalty
				Accessibility
				Convenience
				Choice/Variety
				Parking
				Affordability
				Quality
				Customer Service
				Support Local Businesses
				Availability
				Brands
				Centralised location
			Complimentary attractions	
			Atmosphere	
			Low Traffic	
			Delivery Options	
		Other		
		No Response		
	25	expenditure	How much did you spend on your last shopping trip for larger bulky household goods?	

Section	Question #	Function	Questions	
			0-100 euro	
			100-200 euro	
			200-300 euro	
			300-400 euro	
			400-500 euro	
			500-600 euro	
			600-700 euro	
			700-800 euro	
			800-900 euro	
			900-1000 euro	
			1000-1500 euro	
			1500-2000 euro	
			2000-2500 euro	
			2500-3000 euro	
			3000-3500 euro	
			3500-4000 euro	
			4000-4500 euro	
			4500-5000 euro	
			5000+ euro	
			No Response	
Section 8	Online Shopping	26	Participation	Did you (actively/regularly) shop online before COVID?
				Yes
				No
				No Response
		27	Frequency	How often would you purchase goods online?
				As required
				More than once per week
				Once per week
				3 times per month
				every 2 weeks
				Once per month
				Once every 2 months
				Once every 3 months
				Once every 6 months
				Once a year
				No Response
		28	Grocery	Do you shop online for main groceries?
			a	Yes
				No
				No Response
	b	If yes, how much was your last purchase		

Section	Question #	Function	Questions
			0-25 euro
			25-50 euro
			50-100 euro
			100-200 euro
			200-300 euro
			300+ euro
			No Response
	29	Comparison	Do you shop online for clothing/footwear?
		a	Yes
			No
			No Response
		b	If yes, how much was your last purchase
			0-25 euro
			25-50 euro
			50-100 euro
			100-200 euro
			200-300 euro
			300+ euro
			No Response
	30	Comparison Bulky	Do you shop online for bulky household goods?
		a	Yes
			No
			No Response
		b	If yes, how much was your last purchase
			0-25 euro
			25-50 euro
			50-100 euro
			100-200 euro
			200-300 euro
			300-400 euro
			400-500 euro
			500-600 euro
			600-700 euro
			700-800 euro
			800-900 euro
			900-1000 euro
			1000-1500 euro
			1500-2000 euro
			2000-2500 euro
			2500-3000 euro
			3000-3500 euro
			3500-4000 euro

Section	Question #	Function	Questions	
			4000-4500 euro	
			4500-5000 euro	
			5000+ euro	
			No Response	
	31	Participation	For which type of goods will you now shop more for through online purchase, post-COVID?	
			Main grocery	
			Top-up grocery	
			Clothing and footwear	
			Bulky household goods	
			Comparison goods	
			None, will not increase online shopping in a particular category	
			No Response	
	32	Attraction	Why would you choose to do online shopping (as opposed to visiting a shop location?)	
			Convenience	
			Choice/Variety	
			Affordability	
			Quality	
			Availability	
			Delivery Options	
			Health / Safety	
		Other		
		No Response		
33	Support Local	Do you / would you shop from suppliers in Limerick County (if products are available locally)?		
		Yes, if available		
		No, don't mind		
		Other		
		No Response		
Section 9	Other	34	Other discrete	When you go shopping, how much, if anything do you spend on other thing such as eating out or going to the hairdresser per visit?
				0-25 euro
				25-50 euro
				50-100 euro
				100-200 euro
				200-300 euro
				300+ euro
				No Response



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A.5 Tourism Expenditure

Assumed Convenience Inflow from Tourism per Catchment Area												
Tourist Spend: Assumed Split	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
Ennistymon Catchment	8,956,035	9,890,100	1,282,050	2,600,730	6,556,770	8,168,490	8,974,350	9,560,430	9,926,730	10,293,030	10,659,330	11,062,260
Ennis Catchment	7,463,363	8,241,750	1,068,375	2,167,275	5,463,975	6,807,075	7,478,625	7,967,025	8,272,275	8,577,525	8,882,775	9,218,550
Scariff Catchment	2,985,345	3,296,700	427,350	866,910	2,185,590	2,722,830	2,991,450	3,186,810	3,308,910	3,431,010	3,553,110	3,687,420
Kilrush Catchment	4,478,018	4,945,050	641,025	1,300,365	3,278,385	4,084,245	4,487,175	4,780,215	4,963,365	5,146,515	5,329,665	5,531,130
Limerick Catchment	35,860,770	36,385,800	5,641,020	8,864,460	22,930,380	28,498,140	32,063,460	34,798,500	36,312,540	37,924,260	39,535,980	41,269,800
Clare County	29,853,450	32,967,000	4,273,500	8,669,100	21,855,900	27,228,300	29,914,500	31,868,100	33,089,100	34,310,100	35,531,100	70,769,160

Assumed Comparison Non Bulky Inflow from Tourism per Catchment Area												
Tourist Spend: Assumed Split	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
Ennistymon Catchment	9,535,500	10,530,000	1,365,000	2,769,000	6,981,000	8,697,000	9,555,000	10,179,000	10,569,000	10,959,000	11,349,000	11,778,000
Ennis Catchment	7,946,250	8,775,000	1,137,500	2,307,500	5,817,500	7,247,500	7,962,500	8,482,500	8,807,500	9,132,500	9,457,500	9,815,000
Scariff Catchment	3,178,500	3,510,000	455,000	923,000	2,327,000	2,899,000	3,185,000	3,393,000	3,523,000	3,653,000	3,783,000	3,926,000
Kilrush Catchment	4,767,750	5,265,000	682,500	1,384,500	3,490,500	4,348,500	4,777,500	5,089,500	5,284,500	5,479,500	5,674,500	5,889,000
Limerick Catchment	38,181,000	38,740,000	6,006,000	9,438,000	24,414,000	30,342,000	34,138,000	37,050,000	38,662,000	40,378,000	42,094,000	43,940,000
Clare County	31,785,000	35,100,000	4,550,000	9,230,000	23,270,000	28,990,000	31,850,000	33,930,000	35,230,000	36,530,000	37,830,000	75,348,000

Tourist Spend: Assumed Split by Catchment Area (€m)

Catchment Area	% of Tourism Relevant Revenue	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
	% of Clare												
Ennistymon Catchment	30%	73.4	81.0	10.5	21.3	53.7	66.9	73.5	78.3	81.3	84.3	87.3	90.6
Ennis Catchment	25%	61.1	67.5	8.8	17.8	44.8	55.8	61.3	65.3	67.8	70.3	72.8	75.5
Scariff Catchment	10%	24.5	27.0	3.5	7.1	17.9	22.3	24.5	26.1	27.1	28.1	29.1	30.2
Kilrush Catchment	15%	36.7	40.5	5.3	10.7	26.9	33.5	36.8	39.2	40.7	42.2	43.7	45.3
Limerick Catchment	20%	293.7	298.0	46.2	72.6	187.8	233.4	262.6	285.0	297.4	310.6	323.8	338.0
Total Assumed Revenue	100%	489.3	514.0	74.2	129.4	331.0	411.8	458.6	493.8	514.2	535.4	556.6	579.6



A.6 Notes



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