



# LIMERICK DEVELOPMENT PLAN 2022-2028

Background Paper  
**Economic  
Development  
& Employment**



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## 1.0 – Introduction

Limerick has become a desirable place to live, work and invest after a successful economic rejuvenation in recent years. From record levels of high unemployment and emigration in the past, Limerick, one of Europe's emerging dynamic cities, is recognised as a success story and is ranked as one of the top 10 Western European cities in which to invest. This is the result of major investments in Limerick with the launch of the *Limerick 2030 Economic and Spatial Plan* which has seen the City be radically transformed with €1 billion invested in enterprise and infrastructure projects including Gardens International, Opera Site, Cleaves, Troy Film Studios and Mungret College Lands. The Limerick 2030 Plan is key for the city to realise its full potential and this has been accelerated by the establishment of the Limerick 2030 Strategic Development DAC, the first of its kind to be created by a local authority.

Limerick has a number of key competitive advantages, including affordable housing and office space, low levels of congestion and relatively short commutes, which have resulted in the attraction of a broad spectrum of industries locating in Limerick. Limerick has been identified as one of the most affordable places in Ireland to either buy or rent property and this coupled with the fact, the disposal income is higher than the national average is a significant advantage. Collaboration and joined up thinking is a key strength within the Mid - West region, amongst Local Authorities, third level institutes, statutory bodies and representative bodies. Industry collaborations such as Limerick for IT and Limerick for Engineering are key examples of this collaboration, which are supported by education and training providers, to address future skills, needs and ensure adequate pipeline of talent.

Limerick has excellent connectivity through Shannon International Airport and Shannon Foynes Port, and is central on the Atlantic Economic Corridor and the Wild Atlantic Way. Limerick is home to three excellent third level education institutions, the University of Limerick, the Limerick Institute of Technology and Mary Immaculate College.

However, while Limerick's economy has grown in recent years, the City and County now face major challenges with the recent Covid-19 pandemic. The adverse impact of this is evident with unprecedented increases in unemployment and with some businesses throughout Limerick City and County permanently closing as a result. The Covid – 19 pandemic has had a widespread negative impact on all sectors of society, indications are that the most negative impact has been on the market services sector.

At the beginning of May, between 25 – 30% of Limerick's workforce were unemployed – whereas in February 2020, Limerick's unemployment rate was close to the national rate of 4.8% (adjusted Live Register). At the start of May 22,300 of Limerick's inhabitants were claiming the Covid – 19 pandemic payment, which accounted for almost 4% of the overall claimants, as the country has opened up figures have dropped significantly, however this shift represents a move towards the temporary wage subsidy scheme, with the trend of people getting back to work.

While all sectors of the economy have been impacted by the downturn, two sectors, retail and tourism will be considered as part of this paper, as these industries have been severely impacted by the recent crisis.

Despite, the current economic downturn, Limerick has unique characteristics and ambitious plans in place, which will support its recovery and help position Limerick for future economic growth.

This paper sets out an overview of key economic issues that currently face Limerick. The layout of this paper is as follows:

- Section two reviews national, regional and local policies which will impact future economic growth in Limerick.
- Section three provides an overview of Limerick's current economic performance, analysing the Central Statistics Office (CSO) Census 2016 data, including population, the labour force, enterprise, disposable income, housing and commuting patterns.
- Section four considers Limerick's employment and enterprise strategy including current employment locations, density of works, jobs to resident worker ratios and the location of choice for future jobs growth.
- Sections five and six consider the retail and tourism sectors respectively and the impact that the current Covid-19 pandemic is having on these sectors.
- Section seven concludes with a summary and an overview of the key issues outlined in this paper.

## **2.0 – Strategic Context**

This section outlines national, regional and local policies which impact the economic development of Limerick.

### **2.1 – NATIONAL POLICY**

#### **2.1.1 – Ireland 2040 Our Plan - National Planning Framework (2018)**

Published in 2018, the National Planning Framework (NPF) is the high-level strategic plan for shaping the future development of the country to the year 2040. The plan proposes by 2040, there will be approximately an extra one million people living in Ireland, and this additional growth will require hundreds of thousands of jobs and new homes. The NPF seeks to develop a region-focused strategy for managing growth, which for the first time is linked to a new 10-year investment plan *The National Development Plan 2018 – 2027*. The NPF seeks to rebalance the growth away from Dublin and focus on developing and enhancing the cities of Cork, Galway, Limerick and Waterford. It is a long term framework that sets out how Ireland can move away from the current patterns of growth and disrupt the trends that have been apparent for the last 50 years and have accelerated over the past 20 years. In addition to growing the regional cities, the NPF proposes to grow towns and villages across the country, while also strengthening rural economies and communities.

Limerick is located in the Southern Region, as identified by the NPF, sharing the region with the cities of Cork and Waterford. The NPF has ambitious plans for growth of the region, with an additional 380,000 people anticipated by 2040, taking the population to almost 2 million people. The NPF seeks an additional 56,000 people for Limerick City and Suburbs by 2040, with 50% of the growth to be accommodated on brown and infill sites. The NPF sets out ten National Strategic Outcomes (NSO) to guide future development, which will be implemented through the investment priorities detailed in the National Development Plan.

Furthermore, the NPF has set a target of planning for an additional 225,000 additional people in employment in the Southern Region to 2040 i.e. 880,000 in total. The pattern of urban growth targeted in the NPF is population and employment led, with the strategy recognising that enterprise development is drawn to urban locations by market forces such as agglomeration, migration and specialisation that depend on factors such as scale, accessibility, innovation supported by higher education institutions and quality of life.

Under the NPF, it is planned that half of the overall national growth in terms of population, employment and housing will be targeted at Ireland's five cities – Dublin, Cork, Limerick, Galway and Waterford. Currently, growth has been disproportionately focused on Dublin, and it is the objective of the Framework to redistribute growth in a more balanced manner, which would see each of the other cities grow by at least 50% by 2040, 'to enhance their significant potential to become cities of scale'. The Framework foresees the population of Limerick City and Environs reaching approximately 150,000 by 2040 (an increase of 60% on the current population of 94,192).

The NPF outlines the need to identify locations at an urban scale where enterprises can access competitively priced development lands, utilities and commercial properties to the

highest standards. The strategy requires that regional and local authorities identify and quantify locations for strategic employment in the main cities, and where suitable in urban and rural areas generally. The NPF indicates that when planning to accommodate strategic employment growth the following issues should be considered:

- Current employment location, density of workers, land-take and resource/ infrastructure dependency, including town centres, business parks, industrial estates and significant single enterprises;
- Locations for expansion of existing enterprises;
- Locations for new enterprises, based on the extent to which they are people intensive (i.e. employees/ customers), space extensive (i.e. land), tied to resources, dependent on the availability of different types of infrastructure (e.g. telecoms, power, water, roads, airport, port etc.) or dependent on skills availability; and
- Locations for potential relocation of enterprises that may be better suited to alternative locations and where such a move, if facilitated, would release urban land for more efficient purposes that would be of benefit to the regeneration and development of the urban area as a whole, particularly in metropolitan areas and large towns.

In rural areas creating the environment to support job creation will be a key enabler to rejuvenating rural towns and villages, sustaining vibrant rural communities and reversing population decline. The strategy also identifies the importance of implementing the following key policy objectives in order to enhance the competitiveness of the rural economy:

- Support innovation in rural economic development and enterprise through the diversification of the rural economy into new sectors and services, including ICT-based industries and those addressing climate change and sustainability;
- Facilitate tourism development and in particular a National Greenways, Blueways and Peatways Strategy;
- Support a sustainable and economically efficient agricultural and food sector, together with forestry, fishing and aquaculture, energy and extractive industries, the bio economy and diversification into alternative on-farm and off-farm activities, while at the same time noting the importance of maintaining and protecting the natural landscape and built heritage which are vital to rural tourism;
- Support and facilitate delivery of the National Broadband Plan; and
- Investment coordination together with research and innovation co-ordination.

### **2.1.2 – National Development Plan**

The *National Development Plan (NDP) 2018 – 2027* sets out the investment priorities that will underpin the implementation of the National Planning Framework, through a total investment of approximately €116 billion. This represents a very substantial commitment of resources and is expected to move Ireland close to the top of the international league table for public investment. The plan recognises the importance of making progress in linking the regions, which will be a major enabler for balanced regional development to occur. Government departments are required to align their spending over the coming years with the ambition and desired outcomes of the NPF. In addition, a major innovation in the reformed funding model for the National Development Plan, is the establishment of four

funds to drive the delivery of specific core priorities detailed in the NPF. The four funding streams include: the Climate Action Fund, Disruptive Technologies Innovation Fund, the Urban Regeneration and Development Fund and the Rural Regeneration and Development Fund. Each of the four funds has been established to pursue distinct objectives, which must align with the strategic investment priorities and the National Strategic Outcomes of the NPF. The four funds, which will be allocated resources amounting to an estimated €4 billion over the 10 year period of the National Development Plan. Limerick City and County Council have been successful in bidding for funding on a number of projects under the streams identified above to date and continue to prepare applications for funding, as opportunities arise. The National Development Plan identifies some key enablers for Limerick, which will be delivered over the lifetime of the plan, including;

- Continued Investment in the Limerick Regeneration Programme to 2023;
- National Road Programme for the delivery of the M20 Cork to Limerick and N21/N69 Limerick to Adare to Foynes, pre – appraisal/early planning stages for the N21 Newcastle West Bypass and Abbeyfeale Bypass;
- Investment in the Shannon Foynes Port Company – in terms of capacity extension;
- Investment in Shannon Group – in terms of development of their property portfolio, investment at Shannon Airport and in Shannon Heritage;
- National Maternity Strategy including replacement of standalone Maternity Hospitals including Limerick Maternity Hospital to be relocated to University Hospital Limerick;
- Acute Hospital Developments – including Limerick ward block; and
- New Ambulance base in Limerick.

### **2.1.3 – Enterprise 2025: Innovative, Agile, Connected**

Enterprise 2025 Renewed, Ireland’s national enterprise strategy for 2015-2025, vision is for Ireland to be the best place to succeed in business, delivering sustainable employment and higher standards of living nationally. Although Enterprise 2025, Ireland’s national enterprise strategy, was published only in November 2015 much has changed in the world since then. The strategy has been renewed to ensure that it remains robust in response to a number of recent significant global changes, specifically:

- Brexit: The UK decision to leave the EU from March 2019 could entail changes to trading arrangements with our nearest neighbour, depending on the outcome of the ongoing negotiations between the EU and the UK;
- United States: Potentially significant policy shifts by the US on trade and investment are of concern, not just for Ireland as an open economy, but also for global trade more generally;
- International tax developments: more broadly, including the OECD BEPS (Base Erosion and Profit Shifting) US tax reform, and EU proposals on CCCTB (Common, Consolidated Corporate Tax Base) and digital tax, create a more uncertain environment for mobile investment; and
- Disruptive technologies: There is considerable disruption and opportunity presented due to the speed of adoption of technological advances that impact on global business models, sectors and activities, skills and ways of working.

The document sets out that it is impossible to predict the future and this is clearly the case with the current Covid-19 pandemic, but the documents puts policies in place to prepare for the unknown and to position Ireland for growth over the longer term. The strategy states that the fundamentals of Ireland's enterprise policy remain sound – a focus on export-led growth, underpinned by innovation and talent to drive economic growth and deliver quality jobs throughout Ireland. The strategy recognises that policy action is focused on building resilience in our enterprise base in the face of global challenges. Key objectives include:

- Increase the emphasis on developing Irish owned enterprises, embedding resilience in our enterprise base, enhancing productivity and delivering quality jobs (including supporting companies to navigate their way through Brexit);
- Harness the distinctive characteristics of foreign and Irish owned enterprise mix through collaboration and clustering;
- Place emphasis on innovation and talent and leverage strengths in disruptive technologies so as to achieve our ambition with more enterprises developing new products, services and solutions to compete effectively against international competition;
- Realise the full potential of the Regions through investments in place making - developing places that are attractive for business investment and for people to live and work; and
- Develop international relationships and strengthen economic diplomacy to raise Ireland's visibility, protect Ireland's reputation and provide opportunities for our enterprises.

#### **2.1.4 – Future Jobs Ireland**

Future Jobs Ireland 2019 is part of a multi-annual framework which gives effect to national enterprise policy objectives and leverages all policy areas which relate to job creation and labour force participation, talent development, enterprise growth, innovation and competitiveness and transition to a low-carbon economy are on the agenda for the Country's future enterprise and economic needs.

Future Jobs Ireland seeks to put the Irish economy in a better place to withstand shocks when they come. It sets out a deliberate policy shift to increase firstly quality jobs that will allow for better living standards and secondly, sustainable jobs which will be less vulnerable to loss. Future Jobs Ireland shatters any complacency and sets out an agenda to respond to future risks. Importantly, it seeks to ensure that Ireland benefits from the changes that are already happening in the world of technology, artificial intelligence and robotics, and the move to a low-carbon economy. Future Jobs Ireland focuses on five pillars in the areas of:

- Embracing innovation and technological change;
- Improving SME productivity;
- Enhancing skills and developing and attracting talent;
- Increasing participation in the labour force; and
- Transitioning to a low carbon economy.

The Plan states that lifelong learning should be seen as the norm so that the economy is adaptable to new technology and sectors; businesses needs to consider new ways of

attracting and retaining talent through remote and flexible working options; and to promote female labour force participation. Future Jobs Ireland places a strong focus on increasing productivity and boosting participation rates so that Ireland can take advantage of technological changes and embed them in all parts of the economy. It aims to continue to enhance the skills of Irish workers in order to move quickly to the low-carbon economy.

### **2.1.5 – Realising our Rural Potential – Action Plan for Rural Development**

*Realising our Rural Potential*, the Government’s Action Plan for Rural Development, aims to unlock the enormous potential of Ireland’s rural communities to improve the lives of those living and working in rural areas. Through a framework of supports at national and local level, the Action Plan takes a coordinated approach across Government to both the economic and social development of rural Ireland. The Plan covers a three-year period and contains a series of time-bound actions which will be monitored and reported on regularly.

The key objectives are to:

- support sustainable and vibrant rural communities;
- support enterprise and employment;
- maximise our rural tourism and recreation potential;
- foster culture and creativity in rural communities; and
- improve rural infrastructure and connectivity.

### **2.1.6 – Programme for Government: Our Shared Future (2020)**

Published in June 2020, the planned Programme for Government aims to repair the damage inflicted by the Covid-19 pandemic and deliver a better quality of life for all. The plan creates a vision for reform and renewal that can help Ireland recover and thrive. The plan states that the actions taken over the next five years will define this nation’s future direction for decades to come. The Government’s objective is to contribute positively towards a wider global response to how the post-COVID recovery is shaped and to address decarbonising our economy. The aim of the plan is to get people back to work, to reopen businesses, while developing the strategies and the policies to drive this forward. Key objectives of the plan include:

- To improve the wellbeing of the Irish people and society and to respond decisively to the public’s demand for change in terms of housing, health, climate action and quality of life;
- To support a jobs-led recovery with small and medium enterprises central to the recovery as well as attracting investment to Ireland. This will include investing in the infrastructure and skills required to enhance Ireland’s attractiveness;
- To address the climate and biodiversity crisis with the ambition to more than halve our carbon emissions over the course of the decade;
- To work with the construction sector to ensure that the number of new build homes continues to grow in the years ahead; and
- To invest in key infrastructure that will facilitate new working opportunities and foster enterprises in rural Ireland in order to achieve more balanced regional development in Ireland.

## 2.2 REGIONAL POLICY

### 2.2.1 – Regional Spatial and Economic Strategy (RSES) for the Southern Region (2020)

The Regional Spatial and Economic Strategy (RSES) sets out a 12 year strategic development framework for the delivery of the National Planning Framework within the Southern Region. It includes the Metropolitan Area Strategic Plans for Cork, Limerick-Shannon and Waterford. The strategy is focused on the development of the region, with the cities at the core of this development, as significantly scaled engines of sustainable growth, it also seeks to support the network of towns and villages in the region, with a number of key towns highlighted for growth, while also seeking to revitalise rural areas.

The RSES identifies Limerick City is the largest urban centre in Ireland’s Mid-West and the country’s third largest city. The Metropolitan Area Strategic Plan states that Limerick City and Shannon are interdependent, with their complementary functions contributing to a combined strength that is a key economic driver for the Region and Ireland. Limerick Regeneration, the amalgamation of Limerick City and County and the Limerick 2030 initiative have all contributed to enhancing Limerick’s growth potential.

Newcastle West is identified as a key town in the RSES; it identifies its location as an opportunity for future economic development and employment growth and highlights its strong sub – regional interdependencies with Listowel, Rathkeale, and Abbeyfeale. The RSES highlights the need for further collaboration and enhanced economic growth, for example the extension of the Great Southern Greenway to extend to Listowel. The RSES places significant emphasis on development of networks and recognises the importance of improved intra-regional connectivity between networked settlements – public transport, rail, inter – urban walking and cycling routes, greenways and e – mobility initiatives. There are a number identified for Limerick including:

- Galway, Ennis – Shannon – Limerick Economic Network – this initiative seeks to create a network of key towns and Metropolitan Area, with shared assets
- North Kerry/West Limerick/Shannon Estuary/Clare –
- Limerick – Waterford Transport and Economic Network/axis -

The economic vision as set out in the RSES for the Region is to enable sustainable, competitive, inclusive and resilient growth. This requires the development of a strong and diverse economic base. With immediate challenges such as Brexit, global issues and potential vulnerabilities within Ireland’s enterprise base, Limerick will need to transform its enterprise base for longer-term resilience while managing potential vulnerabilities.

Furthermore, the RSES identifies key locations for Enterprise and Employment in Limerick, which include the National Technology Park, IDA Raheen Business Park, Limerick’s Dock Road, Annacotty Business Park, Ballysimon and Clondrinagh Industrial Estates with development in progress such in Limerick City Centre (Gardens International, Opera Site, and Cleeves). Investment in the creation of ‘place’, as well as Shannon International Airport and Shannon Foynes Port, are key to realising the potential of the Limerick-Shannon Metropolitan Area to attract and maintain economic activity and talent.

### **2.2.2 – Regional Enterprise Plan to 2020 (Mid-West)**

The Mid-West Regional Enterprise Plan (REP) is one of nine such Plans nationally, that have emerged from a process to refresh and refocus the Regional Action Plan for Jobs (RAPJ) initiative which originally focused on the 2015-2017/8 period. The Mid-West Action Plan for Jobs 2015-2017, was an ambitious plan supported by the Department of Enterprise, Jobs and Innovation, which aimed to create an additional 23,000 jobs in the region by 2020. This government policy contained 157 actions to be delivered through collaborative partnership across various public and private stakeholders, government bodies and private business interests. Teams tasked with identifying potential opportunities for future job growth across their sectors which can deliver job growth and business expansions within the region are currently being formed. The Action Plan for Jobs aimed to grow employment by circa 10 – 15% during the lifetime of the initiative. Additionally, the initiative aims to grow tourist numbers in the Mid-West to 1.26 million by 2025; increasing employment in the sector by 25% by 2025.

The purpose of the refresh and refocus was to further build on the positive regional collaboration fostered by the RAPJs over the period to 2020, taking account of the changed and improved economic circumstances nationally, the emergence of new challenges to enterprise development and competitiveness both domestically and internationally in origin, including Brexit, and the persistence of uneven economic progress across the regions in Ireland. Key objectives include:

- Enable a digital and innovation economy and make the Mid-West Ireland’s leading smart city-region;
- Achieve a step-change in progress toward a low carbon economy in the Mid-West;
- Continue to develop workforce skills and talent and enhance the attractiveness of living and working in the Mid-West;
- Develop the regions capacity to deliver economic growth; and
- Build a coordinated regional messaging brand for consistent communication.

### **2.2.3 – Shannon Integrated Framework Plan for the Shannon Estuary**

The Shannon Integrated Framework Plan (SIFP) is an inter-jurisdictional land and marine based framework to guide the future development and management of the Shannon Estuary, commissioned by Clare County Council, Kerry County Council, Limerick City and County Councils, Shannon Development and Shannon Foynes Port Company. The Shannon Estuary itself forms the largest estuarine complex in Ireland covering an area of 500km<sup>2</sup> of navigable water and extending for 100km from Limerick City to Loop Head in County Clare. The estuary is Ireland’s premier deep water port, routinely catering for ships up to 200,000 deadweight tonnage, while Shannon Airport has a dedicated fuel terminal. Shannon Airport and the Gateway town of Shannon are located along the Estuary to the north, while Limerick City and the port of Foynes are located in the southern part of the estuary.

The strategy seeks to encourage, facilitate and promote a balanced approach to harnessing the Estuary’s economic growth potential, whilst simultaneously ensuring careful protection, management and enhancement of the natural environmental resources of the area. The strategy relates to the SIFP study area of the Shannon Estuary, and the interface between the terrestrial and marine areas. The strategy is primarily objective-led relevant to the entire Estuary study boundary, comprising sustainable, forward looking and deliverable objectives,

formulated in consultation with key stakeholders. These objectives will provide guidance and direction throughout the Estuary, and will identify a number of Strategic Development Locations where future strategic development potential is focussed. The objectives represent the link between the analysis of the key issues, the multi-functional nature of the Estuary, the challenges being faced, and the process of achieving the desired future state of the Estuary.

The Strategy identifies a number of Strategic Development Locations throughout the study area, however, for the purposes of this document, the focus, will be on sites located within Limerick City and County, which include:

- Strategic Development Location C – Foynes Island
- Strategic Development Location D – Lands at the rear of Foynes Island
- Strategic Development Location E – Askeaton
- Strategic Development Location F – Aughinish Island
- Strategic Development Location I – Limerick Docks

Some of the sites are identified for marine related industry, including the lands on Foynes Island and Aughinish Island, the lands to the rear of Foynes Island is identified for expansion of the port of Foynes, which was subject of an application to An Bord Peanala in 2019, to increase the capacity of the port. The lands in Askeaton is identified for Industrial use and the lands in Limerick Docks are identified as being strategic in terms of expansion of the city, which is highlighted in the National Planning Framework.

#### **2.2.4 – Atlantic Economic Corridor Initiative**

The Atlantic Economic Corridor (AEC) is the term applied to a non-administrative or “linear” region along the Western seaboard, stretching from Kerry to Donegal. The concept of the Atlantic Economic Corridor is to contribute to effective regional development by creating sufficient scale along the western part of Ireland to match other regions. The aim of the Atlantic Economic Corridor concept is to develop a region of scale to match the success of Dublin and Cork in developing infrastructure, attracting Irish and multinational investment, and growing jobs and wealth in vibrant communities.

It is an objective of the RSES, to develop the Atlantic Economic Corridor initiative as a driver for enterprise growth, investment and attracting entrepreneurial skills and talent to the rural catchments as an economic complement to the role of metropolitan areas and larger urban centres on the AEC. The RSES recognises the combined advantages and opportunities of the AEC including delivering a high-value and low-carbon economy. Limerick City and County Council continue to work with the AEC to deliver for Limerick and the economic corridor.

## 2.3 LOCAL POLICY

### 2.3.1 – Limerick City Development Plan 2010-2016 (as extended)

Limerick City Council adopted the Limerick City Development Plan in December 2010 and set out a clear objective in terms of Economic Development in Chapter 3 of the Plan. It stated that it is the objective of Limerick City Council:

- To develop an enterprising City based on a wide sector mix;
- To create and maintain a unique and attractive City region to attract foreign direct investment and employment;
- To provide for a diverse range of employment needs so that people with a diverse range of skills can find work in the City;
- To support sustainable growth of third level institutions in the City, in particular research and development, and to foster links with business;
- To provide balanced spatial employment to reduce the need for travel and also to provide balanced economic growth throughout the City, in particular in the regeneration areas;
- To maximise the use of available land, including the intensification and re-use of existing land and buildings; and
- To ensure new locations for employment have access to public transport.

In 2014, Limerick City Council and Limerick County Council prepared the Limerick 2030 Spatial and Economic Plan, which was later incorporated in to the Limerick City Development Plan by way of a variation. The 15-year plan sought to transform Limerick through the economic, social and physical renaissance of Limerick City Centre and the wider County and Mid-West. The Plan was prepared as Limerick was about to enter an important phase in its history, Limerick City Council and Limerick County Council had just merged to create Limerick City and County Council and Limerick was designated national City of Culture. While Limerick has been in decline as a commercial centre over the previous 10-20 years, the city centre had suffered the most, as a result of significant out of centres commercial development in relation to both retail and business.

The Plan set out the following vision - *“Limerick will become a major economic force in the Irish and European economy, a leading centre for commercial investment – both foreign direct investment and endogenous business growth, capitalising on the strength of its higher education institutions (HEIs), the skills of its workforce and its environmental and heritage attributes. The City Centre will be at the heart of this economic force – an attractive magnet for retail, leisure, residential, commercial, educational and cultural growth. Growth will benefit all citizens across the City, County and Mid-West Region.”*

The plan sought to deliver 12,000 jobs with 5,000 in the city centre. Since the launch of the plan, Limerick has experienced significant growth with close to 19,000 jobs and €2.73 billion in investments announced. The implementation of the Limerick 2030 Plan has been further accelerated by the establishment of the Limerick Twenty Thirty Strategic Development DAC (Designated Activity Company) which is the first entity of its kind created by a local authority to deliver a city and countywide programme of investment. It is the biggest single Irish commercial property development programme undertaken outside the capital and is tasked

with delivering over €500m worth of transformational investment infrastructure across four strategic sites in Limerick City.

### **2.3.2 – Limerick County Development Plan 2010-2016 (as extended)**

Limerick County Council adopted the Limerick County Development Plan in November 2010 and set out a clear objectives in terms of Economic Development in Chapter 5 of the Plan. The County Development Plan sets out a settlement strategy and outlines the role and function of settlements in the form of a settlement hierarchy, the Limerick Metropolitan area is at the top of the hierarchy (Tier 1), follows by key towns of Newcastle West and Kilmallock (Tier 2). The role of the key towns is to act as key service centres in the county and to act as the drivers of development and significant providers of services.

The environs of the City, located in Castletroy and the Southern Environs are promoted as the primary focus for investment in infrastructure, housing, transport, employment, education, retail, health and community facilities, followed by the key town. The next tier is main centres on transport corridors and are seen as secondary development centres (Tier 3) and include Abbeyfeale, Rathkeale, Castleconnell, Croom, Adare, Askeaton, Patrickswell and Foynes. Smaller towns and villages are located on the tiers 4, 5 and 6) and many cater for the daily and weekly needs of their inhabitants and the surrounding wider catchments and provide a range of employment opportunities and services appropriate to their size and function. The plan recognises the diversity of the economic base from the environs of the city to rural areas of the county.

The plan was prepared in 2009 and an important consequence of the economic downturn was rising unemployment. The Plan states that in July 2009 the number of people on the live register in Limerick (City and County) according to the CSO Live Register Analysis was 21,791. The ESRI's Economic Quarterly of Spring 2009, had forecasted that the national unemployment rate could reach 16.8% of the labour force by 2010, which compared very unfavourably to the unemployment rate of 6.1% in 2006. The downturn had mainly affected the sectors of construction and manufacturing directly, as well as retail and tourism.

The Development Plan set out that, it is vital that Limerick positions itself to take maximum advantage of those emerging and future likely trends and developments, that would bring economic opportunities; and to counter existing and future threats. Important trends and developments that Ireland can capitalise on are likely to be found in renewable energy, through demand for high quality food products, through hi-tech industry and in international services. Due to higher than world average wage costs, Irish exporters are likely to rely on products and services where the emphasis is on quality and innovation. The plan highlights that investment in scientific research and education are likely to be of paramount importance.

More specific to Limerick, the plan states that it is important to utilise such assets that the county has in order to address the challenges posed by the current economic downturn (2009). The County of Limerick has important assets in its natural resources, its skill base, and in its economic and educational institutions. In the County, the Plassey National Technology Park and the University of Limerick, which are mutually adjacent, stand as prime

examples of the kind of progress that has been achieved over the last few decades in the County.

The Plan states that the Port at Foynes and the Shannon Estuary are recognised as a significant core asset for economic development in the region. The Estuary provides a strategic transit gateway whilst the Port facilitates trade from many industrial sectors critical to the ongoing sustainability and competitiveness of the region. The existing deep-water facility at the Port and existing logistical operations provide a transit hub for a diversity of industries in the region including traditional manufacturing, extractive industries, general cargo, and emerging renewable energies.

|  | County Limerick<br>% of active labour force of<br>selection of industrial<br>groups |               |               | State |
|--|---|---------------|---------------|-------|
|  | 1996  | 2002          | 2006          |       |
| Broad Industrial grouping                          |   |               |               |       |
| Agriculture, Forestry and Fishing                  | 15.7  | 8.9           | 6.88          | 4.62  |
| Manufacturing                                      | 23.48   | 20.59         | 19.15         | 12.6  |
| Construction                                       | 7.07  | 9.5           | 11.32         | 11.5  |
| Commerce, insurance, business and finance services | 16.85   | 22.31         | 21.93         | 27.13 |
| Total Active Labour Force                          | <b>41,454</b>   | <b>50,666</b> | <b>59,614</b> |       |

**Table 1 – Percentage of total active workforce working in a selection of key industrial groups, County Limerick and State 1996 – 2006**

*Source: Extract from the Limerick County Development Plan 2010 – 2016 (as extended), CSO*

Furthermore, it sets out that adequate land must be set aside and infrastructure geared to meet the needs of economic development considered desirable over the plan period. An assumption is made for the purposes of this plan that there will be no appreciable net inflow or outflow of residents to jobs. This means that the ratio of employment growth to population growth will be the same as that estimated for the Mid-West Region as a whole by the Mid-West Regional Authority. For every 100 additional people resident in the County by the end of the Plan period, it was estimated that 57 jobs would have to be created (Mid-West Regional Authority, August 2009).

The Mid – West Regional Planning Guidelines projected an additional 32,800 for Limerick County by 2022 (Mid-West Regional Authority, September 2010), which also meant that there was a requirement to facilitate 18,700 new jobs by 2022, which is not taking into account any additional requirement to compensate for unemployment. As the plan indicated, unemployment was already over 21,000 in Limerick City and County. In order to take the high levels of unemployment into account, the plan states that it is reasonable to add 10% to the above new jobs figure to take the effect of unemployment on demand for new sites. The accumulated total for new jobs then becomes 20,500.

### **2.3.3 – Limerick Local Economic and Community Plan (LECP) 2016 – 2021**

The Limerick Local Economic and Community Plan 2016-2021 is a high-level framework plan, which aims to improve the quality of life and well-being of communities and for citizens of Limerick working with principles of equality, diversity and partnership. It sets out 9 high level goals, which can be summarised as follows:

- To create vibrant, safe and sustainable communities in urban and rural areas;
- To increase the population and incomes creating new sources of jobs and enterprise in the local economy;
- To increase the employment rate and reduce unemployment;
- To reduce the number of people living in deprivation, promote social and economic inclusion and a reduction in social inequalities;
- To create a strong urban core, thriving towns, attractive and sustainable villages and countryside;
- To promote urban – rural linkages;
- To build networks of co – operation, within the Limerick City and County Council area and within areas and partners outside;
- To support the protection of the receiving environment; and
- Transition to a low carbon future by 2030.

The LECP sets out a number of action area and objectives to be implemented over the lifetime of the plan. The Development Plan informs the content of the LECP, and the content of the LECP must be consistent with the Development Plan. In this regard, both plans are interdependent in setting out the strategic vision for the economic growth of the City and County, accompanied by supporting policies and objectives to be employed in securing this vision.

This co-ordinated approach to economic development within the Council allows for greater consistency and a plan-led, sustainable approach in assisting the future economic growth of the County. This Plan is primarily focussed on spatial planning and the LECP incorporates priorities and actions on economic development. The Plan sets out a number of key functions which is important in promoting the economic growth of the County, including in particular;

- Linking the economic and spatial dimensions of the Plan by aligning economic growth with the Settlement Hierarchy focusing on key employment locations as drivers for growth and recognising the critical role of rural places in the economic development of the County;
- Providing a sufficient quantum of appropriately zoned and serviced lands to facilitate enterprise opportunities and employment creation;
- Ensuring that existing and planned infrastructure (including water services, public transportation and telecommunications) is maximised in the identification of zoning and servicing of lands;
- Identification of key industry and business sectors supported by policy objectives to accommodate their anticipated needs, where appropriate;

- Ensuring positive placemaking through the development of a network of attractive and sustainable towns, villages and rural areas throughout the County for people to live, work and leisure within; and
- Promoting the creation of clusters within sectors, maximising associated economies of scale
- Futureproofing by way of a flexible policy framework supporting for example smart specialisation.

### 3.0 – Economic Overview

This section provides an overview of Limerick’s economy, analysing population change, the labour market, enterprise, disposable income, education and commuting data.

#### 3.1 – POPULATION

The total population of Limerick City and County recorded by the Central Statistics Office in 2016 was 194,899, an increase of 1.6% over the period from 2011. However, this was considerably lower than the national average growth rate of 3.8% for the same period (Table 2). Of this, Census 2016 shows that some 94,192 persons were resident in Limerick City and Suburbs. Limerick is the third largest city in Ireland after Dublin (1.17 million) and Cork (209,000). The population of Limerick City and suburbs grew by only 3% in the five years since Census 2011, making it the slowest growing of the five major cities during the inter-censal period. Dublin and Suburbs grew at 5.6%, followed by Cork City and Suburbs at 5.1%, Galway City and suburbs at 4.1% and Waterford and suburbs at 3.9%. Evidently, Limerick will need to improve its ability to attract and retain talent for future economic growth.

However, despite overall lower levels of population growth over the five years to April 2016, the long-standing pattern of population decline in the City, evident since 1981, has been reversed. Population growth in the City and Suburbs in the most recent period has been driven by in-migration particularly of new cultural communities (migrants), young people working and living in the City and households/families relocating from regeneration areas into rented accommodation in the City Centre.

| Area                           | Population<br>2011 | Population<br>2016 | Actual<br>Change<br>2011-2016 | % Change<br>2011-<br>2016 |
|--------------------------------|--------------------|--------------------|-------------------------------|---------------------------|
| Limerick City & Suburbs        | 91,454             | 94,192             | 2,738                         | 3.0%                      |
| Limerick City and County Total | 191,809            | 194,899            | 3,090                         | 1.6%                      |
| State                          | 4,588,252          | 4,761,865          | 173,613                       | 3.8%                      |

**Table 2 – Population 2011 - 2016**

*Source: CSO Census 2016*

In terms of population age structure, Limerick has a low age profile with high level of students and workers with young families. The percentage of the population in the 15-24 year cohort in Limerick City and Suburbs (15.5%) and the combined City and County (13.3%) is significantly higher than the national average (12.1%). This cohort is important as is indicative of future labour supply. There is a higher proportion of the population age 65

years and over in Limerick City and County, which has significant implications for future planning for an ageing population.

|                                | Under 15<br>Years | 15-24<br>years | 25-64<br>years | 65 years and<br>over |
|--------------------------------|-------------------|----------------|----------------|----------------------|
| Limerick City & Suburbs        | 19.1%             | 15.5%          | 52.9%          | 12.6%                |
| Limerick City and County Total | 20.3%             | 13.3%          | 52.4%          | 14.1%                |
| State                          | 21.1%             | 12.1%          | 53.4%          | 13.4%                |

**Table 3 – Population Age Structure 2016**

*Source: CSO Census 2016*

Population density within Limerick City and Suburbs has increased over the period from 2011 to 2016 years with just over 1,600 persons per square kilometre, as of the Census of 2016, which is a 2.9% increase since the Census 2011. Dublin is the most densely populated City and suburbs as per the 2016 Census, with 3,700 persons per square kilometre. Galway City and suburbs has 1,500 persons per square kilometre and Cork and Waterford approximately 1,200 persons per square kilometre.

In terms of future population growth, the National Planning Framework has set a target of a 50-60% increase (+50,000-55,000 persons) for Limerick City and Suburbs, with the aim of bringing the total population to at least 145,000 by 2040 (Table 4). Overall, the NPF has projected a population of up to 256,500 for Limerick City and County by 2031. These targets will enable Limerick to become a city of scale, and will have a significant impact on future requirements for housing, enterprise and transport.

| Area                    | Population<br>2016 | Projected<br>Population 2026 | Projected<br>Population 2031 | Projected<br>Population 2040 |
|-------------------------|--------------------|------------------------------|------------------------------|------------------------------|
| Limerick City & Suburbs | 94,192             | 117,696                      | 129,448                      | 145,000                      |
| Limerick                | 195,000            | 229,000-235,500              | 246,000-256,500              |                              |

**Table 4 – Population Projections for Limerick City and Suburbs**

*Source: National Planning Framework*

### 3.2 – LABOUR MARKET

This section analyses the CSO's Census 2016 data in terms of Limerick's employment, unemployment, labour force participation rates and the sectoral breakdown of employment.

#### 3.2.1 – Employment

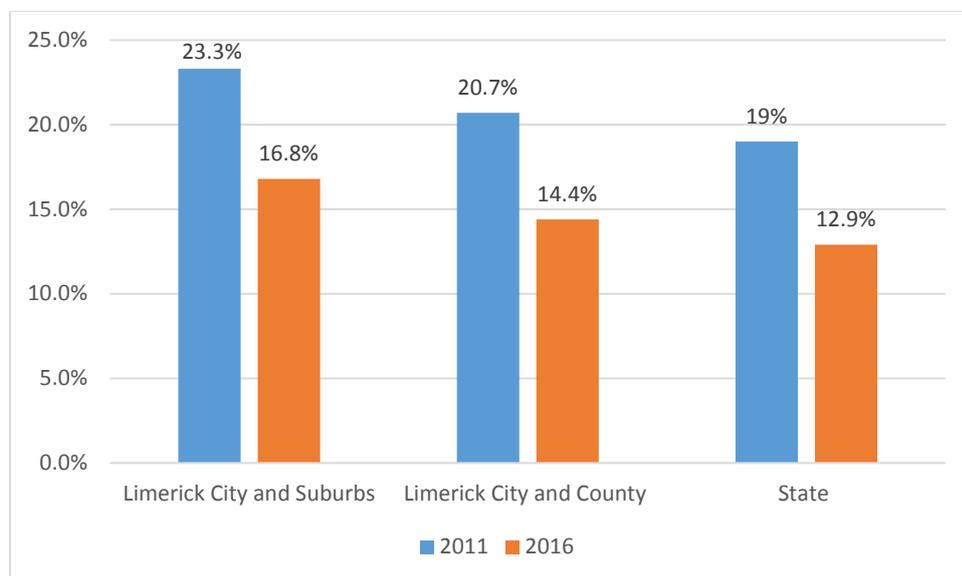
According to Census 2016, some 77,185 of Limerick's labour force were in employment. This represents an increase of 8.7% since 2011, which was lower than the national average increase of 11% for the same period. In terms of Limerick City and Suburbs, the numbers employed increased from 32,112 in 2011 to 35,988 in 2016. The increase of 12% in employment in the City and Suburbs was higher than the national average over the five-year

period, which highlights the importance of the City and Suburbs for generating jobs. While more recent county-level figures are not available, the number of persons in employment has declined in recent months nationally with the Covid-19 pandemic, which has seen an unprecedented rise in the numbers unemployed, which is discussed in following sections. Moreover, job postings were down nearly a third in Ireland in April 2020 when compared to April 2019 suggesting a further slowdown in employment growth.<sup>1</sup> A key aim of the NPF for Limerick is to grow and diversify the city’s employment base and attract more people to live in the city, and with the recent crisis Limerick will have to ensure that its enterprise base is resilient to ensure future jobs growth.

### 3.2.2 – Unemployment

The unemployment rate in Limerick City and County experienced a significant decline over the Census period from 2011 to 2016, from 20.7% to 14.4%. However, despite the decline it continued to remain higher than the national average of 12.9% in 2016. Figure 1 below outlines Limerick’s recent unemployment performance relative to the state.

Limerick City and suburbs recorded a significant fall in unemployment over the Census period from 2011 to 2016, with the rate falling from 23.3% to 16.8%. This represented the greatest improvement across the five main cities in Ireland over the period. However, despite this significant decline, there are considerable ongoing unemployment issues within Limerick City. Census 2016 identified 79 unemployment blackspots across the State, where unemployment is two to three times the national average. Of these, 17 are located in Limerick City and Suburbs.



**Figure 1 – Unemployment Rate (%) 2011 – 2016**

Source: CSO Census 2011

However, the unemployment rate continues on a downward trend and has been decreasing since Q3 2012. Though a strong recovery has been recorded in the labour market in Limerick in the past number of years, quarterly data shows that employment has taken a downward

<sup>1</sup> Adrjan, P. and Lydon, R. (2020) *Covid-19 and the global labour market: Impact on job postings*, Central Bank.

turn recently. There have been five consecutive quarters of quarter on quarter decline to Q4 2018. Prior to Covid 19, the unemployment rate in Limerick was 4.8%, recorded in Q3 of 2019, which was edging towards full employment. Strong economic improvements in Limerick up to March 2020, have reflected in the continued decline in the Live Register numbers in the City and County.

With the onset of the Covid-19 crisis unemployment issues in Limerick are likely to be exacerbated with a significant increase in the number of persons signing on to the Live Register in recent months. While the unemployment rate is not available at county level for 2020, national figures show that the rate was recorded at 15.5% at the end of March and had increased to 28.2% by the end of April. While the unemployment rate will gradually improve as businesses begin to reopen, the effects of the pandemic will undoubtedly be evident in the labour market for a considerable period.

### 3.2.3 – Labour Force Participation

In 2016 there was a total of 90,120 persons in the labour force in Limerick City and County (Table 5). The labour force participation rate in Limerick City and County declined from 58.6% to 58% since 2011.<sup>2</sup> This was similar to the national trend, where the labour force participation rate declined from 61.9% to 61.4%, which the CSO highlights was due to an increase in the number of retired persons. The labour force participation rate in Limerick City and Suburbs, increased marginally from 56.7% to 57% during the Census period. However, the lower labour force participation rate highlights that there is significant potential to increase the numbers in the labour force in Limerick, which is a crucial determinant of future economic growth. Determinants of increased labour force participation include inward migration (attracting talented/skilled labour) and increased female labour force participation.

| Indicator                           | Limerick City & Suburbs | Limerick City and County Total | State     |
|-------------------------------------|-------------------------|--------------------------------|-----------|
| Population age 15 years and over    | 76,239                  | 155,305                        | 3,755,313 |
| At work                             | 35,988                  | 77,185                         | 2,006,641 |
| Unemployed                          | 6,512                   | 11,454                         | 265,962   |
| Looking for first regular job       | 925                     | 1,481                          | 31,434    |
| Student                             | 11,703                  | 20,161                         | 427,128   |
| Looking after Home/Family           | 5,666                   | 12,677                         | 305,556   |
| Retired                             | 10,451                  | 23,139                         | 545,407   |
| Labour Force Participation Rate (%) | 57.0                    | 58.0                           | 61.4      |
| Unemployment rate (%)               | 17.1                    | 14.4                           | 12.9      |

**Table 5 – Principal Economic Status 2016**

*Source: CSO Census 2016*

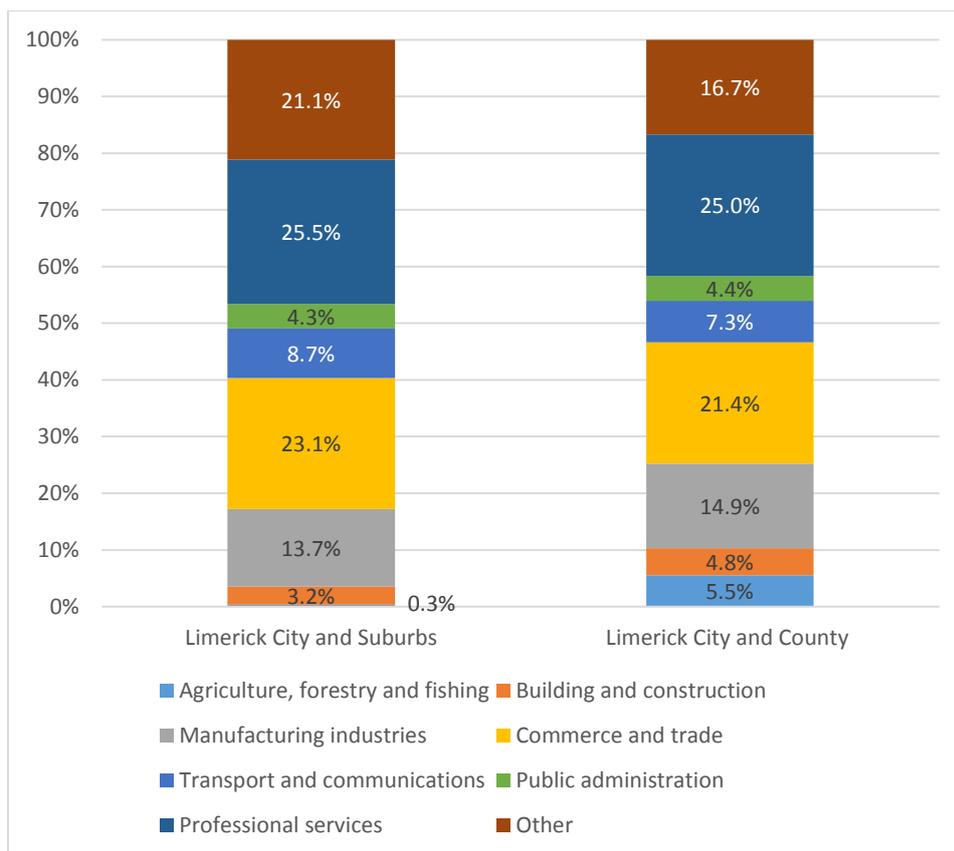
<sup>2</sup>The labour force participation rate measures the total number of persons employed and unemployed as a percentage of the working age population.

In terms of gender split female labour force participation in Limerick City and Suburbs is much lower than that of males. In 2016, just over 51% of females participated in the labour force compared to 63% of males. This is similar for Limerick City and County overall, whereby 51.5% of females participate in the labour force compared to 64.6% of males. This highlights that there is significant potential to increase female labour force participation in Limerick as just over half of females are in employment or seeking employment. The *Programme for Government: Our Shared Future*, which was published in 2020, contains the objective of promoting higher female labour market participation as part of its enterprise policy objectives.

### **3.2.4 – Employment by Sector**

Census 2016 shows that the largest employer in Limerick City and County is the Professional Services sector with 25% of the workforce employed in the sector. This is followed by Commerce and Trade (21.4%) and Manufacturing (14.9%). The Transport and Communications sector experienced the largest growth (13.8%) in the City and County since 2011. This was followed by Professional Services (9.9%) and Manufacturing (7%). Figure 3.2 presents employment by sector for Limerick.

The largest single employment sector in Limerick City and Suburbs is Professional Services accounting for 25.5% of total employment. This is closely followed by Commerce and Trade with 23.1% employed. The Transport and Communications sector experienced the largest growth in employment (17.9%) in Limerick City and Suburbs since 2011. This was followed by Professional Services (11.1%) and Manufacturing (8.5%). A higher proportion of females are employed in the professional services sector while there is a higher proportion of males employed in the manufacturing sector in Limerick.



**Figure 2 – Employment by Sector, 2016**

*Source: Derived from CSO, Census 2016*

### 3.3 – ACTIVE ENTERPRISES

The most recent data from the CSO’s Business Demography shows that in 2017, there were over 9,560 active enterprises in Limerick City and County. This has increased by 11% since 2014. The three largest economic sectors in Limerick are Wholesale & Retail Trade, Construction, and Professional, Scientific and Technical Activities, which between them represent over 55% of total active enterprises, which is similar to national trends.

Limerick is home to 57 IDA-backed firms in total employing 10,500, placing it behind Dublin, Cork and Galway, but ahead of Waterford. The most important sector for FDI investment in Limerick is ICT/Hardware/Software, followed by Engineering and Medical Technology. Bio-pharmaceuticals, Business Services, Financial Services and Consumer Goods are also important sectors for Limerick. While Limerick does not enjoy the same degree of sectoral FDI clustering as can be seen in Cork and Galway, it does have the advantage of a wide range of sectors, which will support its resilience in sectoral downturns.

The *Limerick 2030 Economic and Spatial Plan for Limerick* has the ambition to create a city centre that can attract new inward business investment and encourage the formation of new local business by providing high quality, flexible space. The plan focuses on a range of sectors which will contribute to the future economic growth of Limerick including professional services, ICT, advanced manufacturing, life sciences and logistics among others. Limerick has also successfully attracted Troy Studios, an international film studio, creating an entirely new industry to contribute to the area’s economic growth in recent years.

### 3.4 – DISPOSABLE INCOME

Disposable income is a useful barometer of how well the economy is performing relative to the rest of the country and it is an important quality of life indicator. The data is available on a county basis only, and the most recent report *County Incomes and Regional GDP 2017*, was published by the CSO in 2020. The CSO report shows that in 2017 Limerick City and County's disposable income per person (€22,547) was the third highest in Ireland, after Dublin and Kildare. Disposable income per person in Limerick has significantly increased by 15.6% since 2014. Limerick has a higher disposable income than the national average (€20,714) which is a key advantage for the city and county.

### 3.5 – EDUCATION

Limerick's third level institutes, the University of Limerick, the Limerick Institute of Technology and Mary Immaculate College, are a major asset for the City and County and given the level and sectoral spread of FDI in Limerick. It is paramount that Limerick is positioned to supply a highly qualified, highly skilled labour force to realise the full potential of the economy. In the academic year 2017/2018, some 26,462 students were enrolled across University of Limerick, Limerick Institute of Technology and Mary Immaculate College. The majority of the students, 15,269, were enrolled in University Limerick. In terms of third level education, Limerick has strengths in technical qualifications (ICT), engineering, business, creative sectors (fashion, design) and teacher training/education.

Limerick City and County has a relatively high level (38.5%) of third level educational attainment when compared to the national average (42%). The city and suburbs (39.8%) has a slightly higher rate of residents with a third level qualification (Table 6). However, it is worth considering the former Limerick City area, which is characterised by a low education profile. Based on Census 2016, Limerick City has a high proportion of adults who have ceased their education with Primary/no formal education (17.9%), compared with the State average of 13.3%. This is a major challenge as educational attainment is reflective of the social and economic deprivation of various areas within the city, with early school leavers at risk of social exclusion and long-term unemployment.

|                                   | Primary/No<br>Formal<br>Education | Lower<br>Secondary | Upper<br>Secondary | Third Level<br>Qualification |
|-----------------------------------|-----------------------------------|--------------------|--------------------|------------------------------|
| Limerick City & Suburbs           | 13.9%                             | 16.2%              | 30.1%              | 39.8%                        |
| Limerick City and County<br>Total | 14.3%                             | 17.2%              | 30.0%              | 38.5%                        |
| State                             | 13.3%                             | 15.5%              | 29.2%              | 42.0%                        |

**Table 6 – Education Attainment (%) 2016**

Source: CSO Census 2016

### 3.6 – HOUSING

A key competitive advantage for Limerick in attracting investment and talent is its housing affordability, which is significantly better than Dublin, Cork or Galway. This is particularly important for attracting and retaining talent and investment, which is at the core of the National Planning Framework. The *16<sup>th</sup> Annual Demographia International Housing Affordability Survey: 2020* found that Limerick continues to be one of the most affordable cities to buy a home in, when compared to other Irish and international cities.

In terms of recent average house prices, Real Estate Alliance's *Limerick House Price Survey June 2020* shows that the price of the average three-bed semi in Limerick City rose by 2.5% to €205,000 in the past year.<sup>3</sup> Despite fears of a downturn in the market during the Covid-19 crisis, the price of a three-bedroomed semi-detached house in both the city and county areas remained unchanged over the past three months, with the market being very active according to Real Estate Alliance. Prices in Limerick County remained static in the last year at €165,000. At national level, despite fears of a downturn in the market due to Covid-19, the price of a three-bedroomed semi-detached house fell by just 0.15% over the past three months to €234,667, an annual decline of 0.56%. Residential property in Limerick City and Limerick County is much more affordable than the national average, with a three-bed semi being 14.5% and 42.2% respectively lower.

The continued demand for residential property during Covid-19 further highlights the lack of supply and increasing demand, which has fuelled Ireland's housing crisis in recent years. This housing crisis has reached all regions of the country, with very few cities and towns unaffected. According to Census there were 40,085 housing units in Limerick City and Suburbs in 2016, and 82,112 housing units in Limerick City and County. New housing completions remain low in Limerick, which is similar to other Irish cities.

A key target of the NPF is for at least 40% of all new housing to be delivered within the existing built-up areas of the cities, towns and villages on infill and/or brownfield sites in order to achieve compact growth. The rest of the new housing will continue to be delivered at the edge of settlements and in rural areas. The aim of the NPF is to have higher housing and job densities, so future housing should be located near where the jobs are located in Limerick City and County. Data has shown that not only has there been a hollowing out of the city centre in terms of population but also in terms of appropriate office and housing space. If the city is to attract more people to live there, in order to grow and diversify Limerick's employment base, it means that housing options will need to be improved and provided as a matter of urgency.

The Limerick 2030 Plan has identified measures to encourage significant inner urban residential regeneration and development. In particular, the city centre's Georgian Quarter has been singled out as an area of opportunity for encouraging more city centre living. Given the scale of the issues in the housing market, the suitability of initiatives, such as the Living Cities Initiative, will be key in determining how successful the Limerick 2030 Plan and the National Planning Framework will be in improving the vibrancy of the city centre.

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<sup>3</sup>The REA Average House Price Survey concentrates on the actual sale price of Ireland's typical stock home, the three-bed semi, giving an accurate picture of the second-hand property market in towns and cities countrywide.

### 3.7 – COMMUTING

#### 3.7.1 – Daytime Working Population

Census 2016 shows that after Dublin and Cork, Limerick City and Suburbs overtook Galway City and Suburbs as the third largest centre of daytime working population in the State. This confirms the improving situation in generating employment in the built up urban area of Limerick and with a significant proportion of workers commuting into the urban area to work.

A total of 28,545 workers lived within Limerick City and Suburbs, of which 6,637 (23%) left to work elsewhere, a further 22,716 commuted into the City and Suburbs, which brought the total daytime working population to 44,624 (Table 7). Limerick County (11,378) was the main source of workers to Limerick City and Suburbs in 2016. This was followed by Clare (5,553) and Tipperary North (2,542). Ennis (895) was the main feeder town for Limerick City and Suburbs, followed by Annacotty (743), Shannon (422), Castleconnell (400), Ballina (355), Newcastle West (337) and Nenagh (322).

Between 2011 and 2016 the daytime working population in Limerick City and Suburbs increased by 7.8% (+3,222), which indicates that the City and Suburbs is a major locus of employment for the surrounding areas.

| Limerick City and Suburbs                           | 2016   |
|---|--------|
| Total workers usually resident in town (A)          | 28,545 |
| Persons working in town of usual residence (B)      | 21,908 |
| Persons working outside town of usual residence (C) | 6,637  |
| Persons commuting into the town for work (D)        | 22,716 |
| Daytime working population (E=B+D)                  | 44,624 |
| Net Gain/Loss in working population (E-A)           | 16,079 |

**Table 7 – Daytime Working Population of Limerick City and Suburbs, 2016**

Source: CSO Census 2016

Census 2016 shows that 61,569 workers live in the combined city and county, of which close to 10,000 worked outside of Limerick. Some 16,401 people commute to Limerick for work, bringing the total daytime population to 67,986 (Table 8).

| Limerick City and County                                  | 2016   |
|---|--------|
| Total residents with a fixed place of work (A)            | 61,569 |
| Persons working in the county of usual residence (B)      | 51,585 |
| Persons working outside the county of usual residence (C) | 9,984  |
| Persons commuting into the county to work (D)             | 16,401 |
| Daytime working population (E=B+D)                        | 67,986 |
| Net Gain/Loss in working population (E-A)                 | 6,417  |

**Table 8 – Daytime Working Population of Limerick City and County, 2016**

Source: CSO Census 2016

### 3.7.2 – Commuting to School/College or Work

Table 9 presents travel time to work, school or college for people aged 5 years and over living in Limerick City and Suburbs. According to Census 2016, 38% of people travel in less than 15 minutes, while close to 80% of people travel in less than 30 minutes, which is much higher than the national average of 66%. This is accounted for by a large number of employers, schools and colleges in the built up urban area. A relative lack of congestion in most areas of Limerick is a distinct advantage of living and travelling around Limerick and its surrounding counties, particularly for young professionals and families who spend less time commuting.

|                                | Under 15 minutes | 1/4 hour - under 1/2 hour | 1/2 hour - under 3/4 hour | 3/4 hour - under 1 hour | 1 hour - under 1 1/2 hours | 1 1/2 hours and over |
|--------------------------------|------------------|---------------------------|---------------------------|-------------------------|----------------------------|----------------------|
| Limerick City & Suburbs        | 38.0%            | 41.5%                     | 14.5%                     | 2.5%                    | 2.1%                       | 1.3%                 |
| Limerick City and County Total | 37.9%            | 35.5%                     | 17.5%                     | 4.2%                    | 3.3%                       | 1.6%                 |
| State                          | 34.9%            | 31.1%                     | 18.7%                     | 6.4%                    | 6.5%                       | 2.4%                 |

**Table 9 – Commute Times 2016**

Source: CSO Census 2016

While the commute times of Limerick residents is considered to be a strength, there is an overreliance on cars. There is a strong preference (63.3%) towards the use of a car or van for travel to work, school or college in the City and Suburbs, which is followed by walking or cycling at 26.8%. Both statistics are more favourable than the national average with over 65% reliant on a car or van for travel and 17.4% walking or cycling on average. The RSES highlights the importance of developing a city wide public transport system with enhance accessibility from the City Centre to the National Technological Park, Raheen Industrial Park, UL and Shannon International Airport. In addition to this RSES recommends developing a metropolitan wide cycle network focused on the city/environs, with several high capacity routes, catering for a range of journey purposes.

## **4.0 – Limerick Employment and Enterprise Strategy**

This section considers Limerick's employment and enterprise strategy, in line with the NPF recommendations that planning to accommodate strategic employment growth at regional, metropolitan and local level should include consideration of employment locations, density of workers, locations for expansion of existing enterprises, for new enterprises, and for potential relocation of enterprises. As the NPF aims for growth to be population and employment led, any increases in the housing supply in Limerick should be located with the jobs. Therefore, the jobs density of areas is important to analyse to identify the key employment locations in Limerick City and County.

### **4.1 – STRATEGIC EMPLOYMENT LOCATIONS**

In accordance with the RSES, the Metropolitan Area also has capacity for economic growth of scale at Strategic Employment Locations as briefly outlined in this section.

Through Limerick 2030, the completed Gardens International office development, in conjunction with the approved Opera Centre development and the proposed Cleeves redevelopment sites have the potential to facilitate the provision of a further 7,000 jobs in the city centre. The proposed redevelopment of the Docklands also has significant potential in terms of direct employment and spin off economic growth of the city centre. The €100 million masterplan for the Docklands, which will be branded Limerick Docklands Economic Park, has the potential to create up to 1,000 jobs. Development of the city centre is a key objective of the NPF and RSES, as the primary strategic employment location, with opportunities for private office development commencing on site, within the city centre.

The hospitals at the University Hospital Limerick, the Maternity Hospital and St. John's cater for a regional population of up to half a million people. There are over 3,500 employed in the public hospitals in Limerick. University Hospital Limerick (UHL) is the Model 4 hospital for the region providing major surgery, cancer treatment and care and emergency services as well as a range of other medical, diagnostic and therapy services. The hospital is the hub for three smaller hospitals in the region located at Ennis, Nenagh and St. John's. UHL has recently opened a new Accident & Emergency Department and plans have been approved for a new 60-bed hospital unit. Proposals for the replacement of the standalone Limerick University Maternity Hospital are also underway in accordance with the Project Ireland 2040 National Development Plan 2018 – 2027.

The Higher Education Institutes of University of Limerick, Limerick Institute of Technology and Mary Immaculate College have capacity for expansion and employment creation. The colleges have a combined student population of over 25,000 and have a staff in excess of 3,000 people. LIT has a new campus at Coonagh with state of the art teaching, learning and research facilities which will facilitate expansion of the places on LIT's engineering courses.

The University of Limerick has purchased the former Dunnes Stores site adjacent to Sarsfield Bridge and has plans for the development of a City Campus comprising education and student accommodation facilities. The development of a City Campus will contribute significantly to the revitalisation of the economic and residential core of the city centre.

In the environs Raheen Business Park, the National Technology Park and the proposed Northside Business Campus have been identified as Strategic Employment Locations under the MASP. These strategic locations offer the capacity to cater for investment that require greenfield or brownfield sites, access to an international airport and third level graduates.

IDA Ireland’s Raheen Business Park, which is home to over 50 companies and 3,000 staff, has an additional capacity of 57.5ha. of land. The Business Park serves a number of large multinational companies including Regeneron Pharmaceuticals, Analog Devices, Dell, Banta and Stryker Corp.

The National Technology Park (NTP) has an additional capacity of 71ha. The campus first opened in 1984 as Ireland’s first Science and Technology Park. The NTP, which is connected to the UL campus, is home to 80 organisations including Cook Medical, Vistakon and Gilt, with over 3,000 employed at the Technology Park.

The proposed Northside Business Campus will be developed on the basis of strong links between, and synergies with, Limerick Institute of Technology and the National Technology Park. This Technology/ Business Park will be facilitated by the proposed Limerick Northern Distributor Road and build on the regeneration programme, which has been undertaken in proximity to the proposed road project. In this regard, the Business Campus will facilitate the creation of employment opportunities for the residents of the Regeneration Areas of Moyross and the wider community.

The MASP also recognises the capacity for employment growth elsewhere in the Environs including Castletroy (Ballysimon c.54.6ha., Annacotty c.37.5ha.) and the Northside (Clondrinagh c.27.7ha.). Table 10 below outlines the strategic employment locations in Limerick City and Suburbs, as identified by the Northern Distributor Road.

| Location                                | Available Land |
|---|----------------|
| National Technology Park (NTP), Plassey | 71 hectares    |
| IDA Raheen Business Park, Raheen        | 57.5 hectares  |
| Dock Road                               | 113.2 hectares |
| Ballysimon Industrial Estate            | 54.6 hectares  |
| Clondrinagh Industrial Estate           | 27.7 hectares  |
| Annacotty Business Park                 | 37.5 hectares  |

**Table 10 – Strategic Employment Locations within Limerick City and Suburbs**

#### **4.2 DISTRIBUTION OF JOBS**

Census 2016 shows that Limerick City and Suburbs is a key economic driver and acts as a major focus of employment. In 2016 there were 44,625 jobs located in the city, indicating an increase of over 4,000 jobs over the previous five years.

While population and employment are important indicators of the urban structure, where the jobs are located is also important for giving insight into urban areas. The ratio of jobs to

residents is indicative of the performance of an area in terms of attracting workers from a wider catchment area. The analysis undertaken as part of the NPF shows that the urban areas in the Southern Region have an average jobs to resident workers ratio of 1.06. Limerick City and Suburbs, Abbeyfeale and Kilmallock all have higher jobs to resident workers rates which highlights their importance as employment locations and their ability to attract workers from other areas.

| Settlement Name           | Population 2016 | Resident Workers | Total Jobs | Jobs: Resident Workers |
|---------------------------|-----------------|------------------|------------|------------------------|
| Abbeyfeale                | 2,023           | 673              | 1,354      | 2.012                  |
| Annacotty                 | 2,930           | 1,385            | 846        | 0.611                  |
| Castleconnell             | 2,107           | 824              | 246        | 0.299                  |
| Kilmallock                | 1,668           | 537              | 722        | 1.345                  |
| Newcastle West            | 6,619           | 2,611            | 2,413      | 0.924                  |
| Limerick City and Suburbs | 94,192          | 35,404           | 44,625     | 1.260                  |

**Table 11 – Population and Employment in Urban Settlements, Limerick, 2016**

*Source: National Planning Framework, CSO Census 2016*

## **5.0 – Retail**

The retail sector is essential to the vitality of Limerick City Centre, with the sector providing goods and services as well as employment and income for the local economy. Retail and services play a key role in place-making and creating attractive livable environments, enabling strong mixed-use urban cores and facilitating regeneration. This section focuses on policy in relation to the retail sector, current national and regional retail performance, and the impact of Covid-19 on the retail sector.

### **5.1 – NATIONAL AND REGIONAL POLICIES**

#### **5.1.1 – Ireland 2040 Our Plan: National Planning Framework**

In terms of securing compact and sustainable growth, the plan identifies that retail and housing has been moving out of cities and towns, resulting in empty buildings and the lack of sufficient people to create strong and vibrant places, both day and night. Therefore, the National Planning Framework states that each metropolitan area strategic plan will set out a clear and concise strategy in relation to retail.

#### **5.1.2 – Regional Economic and Spatial Strategy**

The Regional Spatial and Economic Strategy for the Southern Region sets out that retail is a key part of the regional economy employing significant numbers and is central to the life and vitality of our cities, towns and village centres. Retail plays a central role in place making and creating attractive livable environments, enabling strong mixed-use urban cores and facilitating regeneration. The retail landscape is constantly changing and in recent years the trend to online shopping has had profound negative impact on our cities, towns and villages. There is a need to adapt to the continuous development of shopping habits and retail, including a significantly improved customer experience of visiting settlement centres. This is a significant planning challenge to provide alternative and attractive uses within our cities, towns and villages.

RPO 55 – Retail sets out that it is an objective to:

- Improve the physical appearance, vitality and vibrancy of city centre, town centre and village locations through collaboration between Planning Authorities and Retail Traders Associations in regeneration / public realm projects and other measures;
- Ensure that retail development is focused on urban and village centres with the application of a sequential approach to consideration of retail development, which does not fall into this category;
- Prepare Retail Strategies in accordance with the Retail Planning Guidelines including Joint Retail Strategies where applicable. Proposed public realm or urban regeneration projects should be assessed for potential impacts on the receiving environment including capacity of existing services at project level. Where public realm or urban regeneration projects would significantly increase shopper/visitor numbers, planning authorities should ensure that projects include sustainable management of increased demand for access to city/town centre locations.

Limerick City and County Council in conjunction with Clare County Council have sought specialist consultants to prepare a retail strategy for the Limerick – Shannon Metropolitan Area, as required by the RSES and for the remainder of County Limerick and County Clare as

required by the RSES policy. A key aim of the strategy is to ensure that Limerick City fulfils its role at the top of the regional hierarchy as the preferred location for new retail development. While vacancy rates within the city centre remain high, there has been incremental increases in out of town retail centres, including: The Crescent Shopping Centre, A2 Shopping Centre, Childers Road, Parkway Shopping Centre, Jetland Shopping Centre, Castletroy Shopping Centre, Coonagh Shopping Centre and Roxborough Shopping Centre.

## **5.2 – NATIONAL RETAIL PERFORMANCE**

The retail sector is Ireland's largest private sector employer and the most geographically diverse. Prior to the Covid-19 pandemic, over 280,000 people were employed in retail, in every city, town and village, right across the country. This is more than twice that of Ireland's second largest sector, financial services. As such, retail plays a crucial role in stimulating economic growth and enterprise, sustaining employment and supporting lively and vibrant communities across Ireland. According to Retail Ireland, rising disposable incomes (prior to March 2020), record numbers in employment and falling prices due to intense competition have all combined to give consumers greater spending power.

The opening of shopping centres in peripheral areas have threatened traditional retail located on high streets and the commercial viability of older shopping areas in the city centres. In addition, since the opening of the first online store by Amazon in 1995, and particularly in post-recession Ireland, the retail sector is increasingly moving online. The Central Bank *Credit and Debit Card Statistics* indicate that the total e-commerce spend was in the region of €2.1 billion for 2019, representing an increase of over 100% since 2015. The growth in the online sales channel, approximately 60% of which is spent out of the country, is running at six times that of traditional retail shops. By 2028 it is expected that 48% of all non-food shopping will be online. This issue, in combination with the other factors outlined above has serious consequences for competition, sales and footfall and the vibrancy and vitality of the city centre.

Research from the UK retail intelligence company Springboard has found that between 2008-2018 footfall on high streets declined by 20%. Springboard found that capture rates (in store footfall) in department stores has declined by 4.1% and electrical shops and mobile phone stores by 6% since 2015. However, bookshops and entertainment venues have increased capture rates by 2.9% and food and convenience shops by 1.2%.

## **5.3 – LIMERICK'S RETAIL PERFORMANCE**

The retail sector is essential to the vitality of Limerick City Centre. The sector provides goods and services as well as employment and income for the local economy. Retail and services play a key role in place-making and creating attractive livable environments, enabling strong mixed-use urban cores and facilitating regeneration.

Historically Limerick City Centre was the economic engine, commercial heart and cultural soul of the Limerick region. In 2008 the city centre was dominated by high order comparison floor space and had a strong representation of speciality and high order retailing with low vacancy rates of 4.3%. Unfortunately, in recent decades Limerick City Centre's retail sector has been in decline, with the sector migrating to the purpose built out of town shopping

centres and increasingly to an online platform. The retail and services sector remains a significant employer and economic contributor in Limerick.

The decline of the city centre is provoked by urban and technological change. Such change often arises because private retail developers invest in different areas, such as out of town retail parks and shopping centres located in close proximity to large residential areas, resulting in reductions in pedestrian footfall and expenditure leakages from the city centre. The exponential rise of online retail activity has had a significant impact and will continue to influence the retail sector in the city centre. Emerging technology will continue to influence the manner in which people shop over the lifetime of this plan. The *PWC Retail & Consumer Report 2018* indicates that whilst Irish consumers spent approximately €5bn online last year, 60% of this was spent outside of Ireland. These factors have contributed to the closure of many businesses, increased obsolescence and vacancy of units in the city centre.

The core retail area in Limerick City comprises Thomas Street/ Bedford Row, William Street/ Sarsfield Street, O'Connell Street/ Patrick Street, Cruises Street, Roches Street, Henry Street and Catherine Street. This area is anchored by the Brown Thomas department store and general stores including Dunnes Stores and Penneys, as well as the Tesco supermarket at Arthur's Quay. Arthur's Quay is the only purpose built shopping centre in the city centre.

Between January 2018 and 2020 surveys of the use of ground floor units indicated minor changes in the numbers of convenience and comparison type shops, while the number of retail service and leisure service uses increased across the city. Approximately 100 commercial units operate as part of a chain or franchise in the city.

Surveys carried out over the last three years shows a slight increase in commercial vacancy in the core retail area, see Table 12 below.

It is an objective of the RSES to reposition the city centre as the premier regional shopping destination at the top of the hierarchy. This objective will be achieved by improving the range and quality of shopping on offer, in the context of a much improved customer experience of visiting the city centre as a whole. A contemporary shopping offer with leisure – food, drink and entertainment at the heart of the experience. This can be achieved by radically improving the shopping experience in the prime shopping area – in the vicinity of Brown Thomas, Penneys, Cruises Street and the Arthur's Quay Shopping Centre. This is the Central City location that major multiple retailers would wish to locate in, and is the focal point of the shopping quarter of Limerick.

The state of the retail sector can be determined through examination of patterns of use, vacancy rates and footfall statistics. For the past three years the Strategic and Forward Planning Section of Limerick City and County Council has carried out a survey of building occupancy and uses across the city centre covering in the region of 8,240 units. For the purpose of this paper the core retail area is defined as Thomas Street/ Bedford Row, William Street/ Sarsfield Street, O'Connell Street/ Patrick Street, Cruises Street, Roches Street, Henry Street and Catherine Street.

## 5.4 – PATTERNS OF USE

The ground floor shopfront units create a showcase to the street and provide the most accurate picture of the health of the city at the time of survey. The table below sets out the uses found at ground floor level throughout the city centre identified during the course of the Forward/Strategic Planning surveys.

|                               | 01/2018          | 01/2019          | 01/2020          |
|-------------------------------|------------------|------------------|------------------|
| Ground Floor (GF) Use         | No. of Units     | No. of Units     | No. of Units     |
| Comparison                    | 172              | 173              | 172              |
| Convenience                   | 73               | 77               | 75               |
| Retail Service                | 182              | 192              | 193              |
| Other Retail                  | 88               | 86               | 81               |
| Financial & Business Services | 177              | 186              | 179              |
| Leisure Services              | 197              | 204              | 212              |
| Health & Medical Services     | 63               | 61               | 63               |
| All Others*                   | 201              | 213              | 194              |
| Vacant Commercial             | 376              | 340              | 344              |
| <b>Total Commercial</b>       | <b>1,529</b>     | <b>1,532</b>     | <b>1,513</b>     |
| <b>Commercial GF Vacancy</b>  | <b>25%</b>       | <b>22%</b>       | <b>23%</b>       |
| Residential                   | 1,347            | 1,334            | 1,334            |
| Vacant Residential            | 88               | 98               | 103              |
| <b>Total Residential</b>      | <b>1,435</b>     | <b>1,432</b>     | <b>1,437</b>     |
| <b>Residential GF Vacancy</b> | <b>6%</b>        | <b>7%</b>        | <b>7%</b>        |
| <b>Total No. of Units</b>     | <b>2,964</b>     | <b>2,964</b>     | <b>2,950</b>     |
| <b>Total GF Vacancy Rate</b>  | <b>15% (464)</b> | <b>15% (438)</b> | <b>15% (447)</b> |

**Table 12 – Limerick City Centre Ground Floor Use & Vacancy**

Source: Limerick City and County Council, Forward/Strategic Planning (2020)

\*All Others includes buildings categorised as Public Service, Religious Service, Storage & Warehousing Carpark Surface, Multi-storey and other buildings.

Between January 2018 and 2020 the findings of the ground floor surveys indicate minor changes in the numbers of convenience (+2) and comparison (+/-0) type shops, while the number of retail service (+11) and leisure service (+15) uses increased notably across the entire city. In the core retail area, the survey identified approximately 100 commercial units which were operating as part of a chain/franchise. With the exception of a number of restaurants, cafes and bars there is a notable absence of leisure facilities in the city centre such as cinemas, theatres and sporting activities.

## 5.5 – VACANCY

Overall the number of ground floor vacant commercial units throughout the entire city centre reduced from 376 to 344 (-32) in the last two years. In January 2020 the survey identified vacancy rates of 23% amongst commercial properties and 8% amongst residential

units in the city centre (Table 13). However, it should be noted that the commercial vacancy rate across the entire city centre indicates an improvement of 2% year on year for 2019 (25%) and 2018 (27%) as set out in the table below. Unfortunately, this has not been the trend in the core retail area with an increase in vacancy rates of 2% evident since 2018.

| Core Retail Area   | 2018 | 2019 | 2020 |
|--------------------|------|------|------|
| Vacant Commercial  | 17%  | 17%  | 19%  |
| Vacant Residential | 33%  | 33%  | 33%  |

**Table 13 – Core Retail Area Vacancy Rates, Forward/Strategic Planning (2020)** *Source: LCCC Forward Planning*

With specific respect to the core retail area the surveys identified that the majority of vacant units were found on William Street/ Sarsfield Street, followed by O’Connell Street/ Patrick Street as outlined in the table below.

| Street                           | No. Vacant Units 2018 | No. Vacant Units 2019 | No. Vacant Units 2020 |
|----------------------------------|-----------------------|-----------------------|-----------------------|
| Thomas Street/ Bedford Row       | 9                     | 7                     | 10                    |
| William Street/ Sarsfield Street | 17                    | 20                    | 17                    |
| O’Connell Street/ Patrick Street | 14                    | 13                    | 12                    |
| Cruises Street                   | 1                     | 2                     | 3                     |
| Roches Street                    | 5                     | 8                     | 8                     |
| Henry Street                     | 2                     | 5                     | 3                     |
| Catherine Street                 | 6                     | 5                     | 2                     |

**Table 14 – Limerick City Vacancy by Street 2018-2020**  
*Source:*

*Limerick City and County Council, Forward/Strategic Planning, 2020*

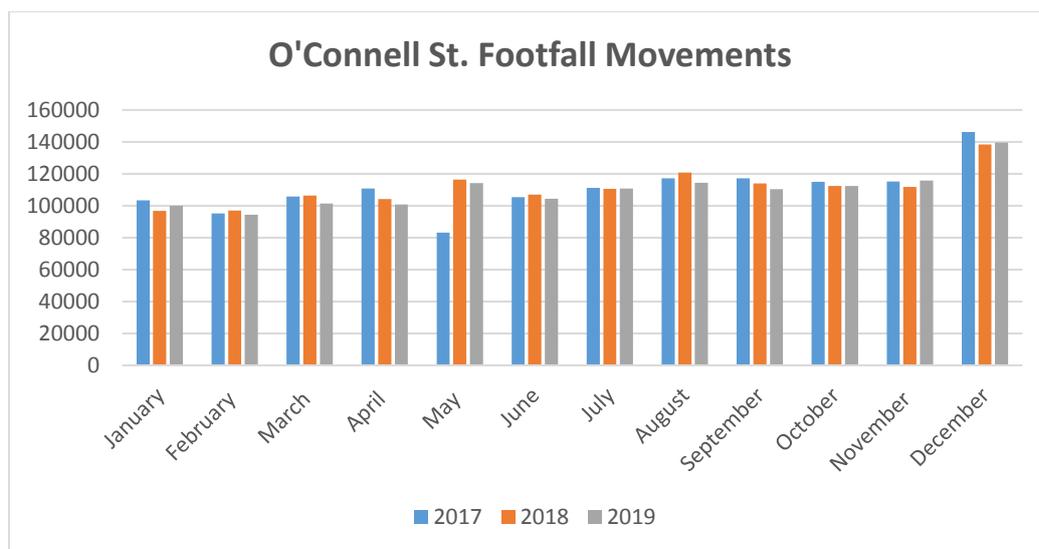
The findings of the core retail area survey found that the streets with the least vacancy in 2020 are Cruises Street and Catherine Street. However, with the exception of Catherine Street all streets have shown an increase in the number of vacant units since 2018.

Catherine Street is relatively attractive from a public realm perspective and is home to a mixture of coffee shops, restaurant and leisure type uses in addition to retail and office buildings. In this regard, the success of this street is consistent with the international research that leisure destinations in attractive areas are vital to a successful city centre.

The Forward/Strategic Planning survey noted that there was significant vacancy evident in Georgian buildings in the city, resulting in deterioration and obsolescence of sections of some streets. The Limerick Georgian Neighbourhood project is pursuing a number of innovative projects within the area to facilitate investment, city centre living and business ventures. However, the viability of private land owners retaining and redeveloping some of these existing buildings for commercial or residential purposes in accordance with current fire and building regulations would prove uneconomical. However, careful consideration is required with respect to the conservation policies of the forthcoming proposed Limerick Development Plan in relation to the redevelopment and reuse of Georgian buildings in the interest of revitalising the city centre.

## 5.6 – FOOTFALL

With respect to footfall there are counters positioned in the city centre at O’Connell Street, William Street, Thomas Street and Cruises Street. A decline in pedestrian movements through the city centre is evident over the past three years. In this regard, utilising the O’Connell Street South to North counter, it is noted that 1,325,630 pedestrian movements were recorded during 2017. While the same counter recorded an increase in pedestrian movements to 1,335,432 persons in 2018, a decrease in movements was identified in 2019 with 1,317,929 movements recorded. Overall, the footfall recorded in 2019 showed a decline of 7,701 pedestrian movements on the numbers recorded in 2017 indicating that the city centre is losing trade.



**Figure 3 – O’Connell Street Footfall Figures**

The closure of businesses in the city centre has resulted in a lack of maintenance of some vacant buildings with uninviting urban decay evident on parts of some streets in the city. In order to address these issues, the creation of a resilient approach to revitalising the core of the city centre should be key in the formulation of future planning policy.

## 5.7 – IMPACT OF COVID-19

The Covid-19 pandemic has dramatically changed the retail sector in Ireland which is about to enter its most challenging time, in the coming months. The sector will have to recover from months of closure, while also adapting to new ways of operating in terms of social distancing and adhering to public health guidelines. The future performance of the retail sector is essential to the vitality of Limerick City Centre, in terms of the provision of goods and services, and employment and income for the local economy. A huge challenge for the sector is the uncertainty facing retailers for the remainder of 2020.

The retail sector in Limerick City Centre has been in decline in recent decades, with the sector migrating to the purpose built, out of town shopping centres and increasingly to an online base. This will be further exacerbated by the recent closures of major city centre retailers due to Covid-19, including Debenhams, Argos, and Oasis and Warehouse which operated concessions in Brown Thomas. The growth in the online shopping trend is likely to

continue for the foreseeable future and retailers will have to adjust to a new normal. A recent PWC report *Covid-19: Preparing to reboot the retail sector*, which was published in April 2020, suggests that retailers will need to build for greater online capacity, plan for customer-centric safe shopping, understand and plan for the financially constrained shopper, reassure customers as they emerge from lockdown, and plan for ongoing supply chain disruption. The retail strategy for Limerick will need to ensure that initiatives are put in place to support the recovery of the retail sector in Limerick.

## **6.0 – Tourism**

Tourism is a crucial employment sector in Ireland and vital for the future economic growth of Limerick. Until recently, the sector had been performing well, however the recent Covid-19 pandemic has severely impact the industry. The following sections consider current policy and strategies in relation to tourism. National tourism performance is outlined and the performance of the tourism sector in Limerick is analysed. Finally, Limerick’s tourism assets are considered.

### **6.1 – TOURISM POLICY**

#### **6.1.1 – Tourism Development and Innovation: A Strategy for Investment 2016-2020**

The Strategy highlights that a flourishing tourism industry is vital for Ireland’s economic wellbeing and recovery, and that it also shapes Ireland’s image and attractiveness as a great place to live, work and invest. The strategy emphasises that there is significant unrealised potential in the sector. The strategic objectives of the plan are outlined as follows:

- To successfully and consistently deliver a world class visitor experience;
- To support a tourism sector that is profitable and achieves sustainable levels of growth and delivers jobs;
- To facilitate communities to play an enhanced role in developing tourism in their locality, thereby strengthening and enriching local communities; and
- To recognise, value and enhance Ireland’s natural environment as the cornerstone of Irish tourism.

#### **6.1.2 – People, Place and Policy - Growing Tourism to 2025**

The Department of Transport, Tourism and Sport’s Policy Document People, Place and Policy Growing Tourism to 2025 highlights that Ireland has an exceptional tourism offering and the sector is of critical importance to the economy. By 2025, the objective is to have a vibrant, attractive tourism sector that makes a significant contribution to employment across the country, is economically, socially and environmentally sustainable, helps promote a positive image of Ireland overseas, and is a sector that people wish to work in. The strategy’s policies include:

- Targeting high growth potential areas; Incorporate Cultural and Sports-based Offerings;
- Respecting Brand Architecture and the Environment;
- Need to optimise Air and Sea Connections;
- Need to facilitate inter-modal transport transfers; and
- Support for Cross-Border Tourism.

#### **6.1.3 – Tourism Development & Innovation: A Strategy for Investment 2016-2022**

Fáilte Ireland’s Strategy, recognises that a flourishing tourism industry is vital for Ireland’s economic well-being and continued recovery. It shapes Ireland’s image as an attractive place to live, work and invest. Strategic objectives include:

- To successfully and consistently deliver a world class visitor experience;
- To support a tourism sector that is profitable and achieves sustainable levels of growth and delivers jobs;

- To facilitate communities to play an enhanced role in developing tourism in their locality, thereby strengthening and enriching local communities; and
- To recognise, value and enhance Ireland’s natural environment as the cornerstone of Irish tourism.

#### **6.1.4 – Programme for Government 2020**

The Programme for Government 2020 recognises that tourism is one of Ireland’s most important economic sectors and the Government recognises its significance as a source of local employment and regional development. COVID-19 has had a devastating impact on tourism and the Government will set out how they will support the sector through the remainder of 2020. A domestic tourism campaign to promote staycations is being prioritised. Key aims of the programme include to:

- Work with EU partners to introduce new tourism specific funding supports for Member States and to allow maximum flexibility in state-aid rules to enable the provision of timely and appropriate supports;
- Make 2023 the Year of the Invitation – a global invitation to visit Ireland on the 10-year anniversary of The Gathering;
- Sustain investment in Tourism Ireland and Fáilte Ireland to improve our overall offering as a top-quality and value-for-money destination;
- Develop and promote Ireland as a long-stay tourism destination to spread tourism more evenly across the country. This will help reduce emissions and maximise economic return;
- Develop a Sustainable Tourism Policy document, and in advance of this an Interim Action Plan.

#### **6.1.5 – Regional Spatial and Economic Strategy for the Southern Region**

The Regional Spatial and Economic Strategy (RSES) identifies tourism as a significant economic activity and seeks to increase tourist numbers, support sustainable jobs through targeted tourism initiatives, develop activity tourism and leverage natural and built heritage assets. The strategy highlights that a successful tourism sector creates significant benefits for many other sectors such as agriculture, food and drinks, transport and retail. In terms of Limerick’s tourism assets RSES states that it is an objective to support the utilisation and realisation of the Mid West’s existing and emerging tourism assets. For Limerick these include the promotion of Ireland’s Lakelands, the Shannon Estuary and its islands as tourism and recreation destination, greenways, blueways, effective placemaking, Munster Vales, Shannon Estuary Way, festivals and King Johns Castle.

RPO 53 – Tourism sets out that it is an objective to:

- Enhance provision of tourism and leisure amenity to cater for increased population in the Region including recreation, entertainment, cultural, catering, accommodation, transport and water infrastructure inter alia;
- Promote activity tourism subject to subject to appropriate site selection and environmental assessment processes;
- Sustainably develop the road network and public transport services and facilities for improved visitor access, longer dwell times due to improved connectivity to ports and airports and tourism growth;

- Sustainably develop walking and cycling trails opening greater accessibility to the marine and countryside environment by sustainable modes and promote the sustainable designation and delivery of Greenway and Blueway Corridors;
- Facilitate appropriate tourism development and in particular a National Greenways, Blueways and Peatways Strategy, prioritising sustainable projects that achieve maximum impact and connectivity at national and regional level;
- Identify and map catchment areas concerning Culture, Heritage and Tourism of regional significance/scale. Such catchments should have the potential to deliver small-scale economic development and using wider local services such as Post Offices and local public transport; and
- Support the relevant authorities in the development of specific monitoring protocols for visitor pressure to ensure that tourism activities are maintained within sustainable limits for the European sites in the Region.

### **6.1.6 – Limerick Tourism Development Strategy Action Plan 2019-2023**

Limerick City and County Council has prepared a *Tourism Development Strategy, Action Plan 2019-2023*. The strategy aims to revitalise the tourism sector, capture key opportunities for growth and highlight priority action areas to unlock the significant benefits that a thriving tourism industry can bring. The strategy aligns with the *Limerick 2030 Economic and Spatial Plan for Limerick* which has earmarked tourism as one of the key sectors for future growth. The vision is for Limerick to *'be internationally recognised as a world class location to visit'*. The new strategy to develop tourism across Limerick city and county envisages that the total number of visitors to Limerick will reach 1.1 million per annum, generating more than €360 million in revenue and creating 1,500 new jobs by 2023. The strategy identifies four areas that are central to driving the vision for tourism in Limerick and includes waterways, activities, heritage, arts and culture.

The strategy was developed at a time of optimism and significant transformation in Limerick. Recent investments in the tourism sector include the €172 million investment in Adare Manor and Golf Course and the proposed €10 million investment in the Engage Rugby Experience, currently under construction, which have added to the sense of energy and excitement around Limerick's tourism industry. These achievements and other accolades such as Limerick's Purple Flag status have fostered a renewed energy and sense of pride in Limerick people throughout the city and county.

### **6.2 – NATIONAL TOURISM PERFORMANCE**

The most recent data from Fáilte Ireland shows that overseas tourists to Ireland in 2018 grew by 6.5% to 9.6 million. Expenditure by tourists visiting Ireland (excluding receipts paid to Irish carriers by foreign visitors) was estimated to be worth €5.6 billion in 2018, this represents growth of 6% on 2017. Combining spending by international tourists with the money spent by Irish residents taking domestic trips and receipts paid to Irish carriers by foreign visitors, total tourism expenditure in 2018 was estimated to be €9.4 billion.

In terms of direct employment in the tourism sector, the Census 2016 shows that there was 116,918 employed in the Accommodation and Food Service Activities, a category which includes hotels, restaurants, bars, and canteens and catering. Employment in the direct

tourism sector increased by 13% from 2011 to 2016. This highlights the importance of the tourism sector for job creation and economic growth in Ireland.

However, the recent Covid-19 Pandemic has resulted in unprecedented challenges for the tourism industry in Ireland. A recent survey, published by Fáilte Ireland in June 2020, during the pandemic *Fáilte Ireland Covid-19 Survey Wave 1* found that 93% of businesses surveyed were currently closed. Approximately two-thirds of the businesses planned to re-open in 2020. Businesses surveyed include from hotels, restaurants, pubs, visitor attractions, and retail among many others. In terms of employment, 45% of businesses who took part in the survey stated that they had no employees at the time of the survey.

Over the 10 year period to 2019 there was a 56% increase in overseas visitors to Ireland, however, this has been completely reversed as a result of Covid-19. A recent analysis by EY, *Potential impact of Covid-19 on Irish Tourism* in April 2020, highlights that tourism sector was the first to be impacted and likely to be the last to fully recover from the crisis. The EY report further highlights the reliance of the rural economy on tourism, and as a result the regions were less resilient to the impact of Covid-19.

These reports highlight the unprecedented impact of the Covid-19 pandemic on the tourism industry, which similar to other industries will take considerable time to recover. The industry will be impacted as disposable incomes decline, people become reluctant to travel for leisure and there will be less business travel. Jobs will be significantly impacted and business models will have to change to adapt to new regulations. This will require a coordinated approach by the public and private bodies in Limerick to support the recovery of the tourism industry.

### **6.3 – LIMERICK'S TOURISM PERFORMANCE**

The successful development of tourism is important not only for Limerick City, but for the county as a whole. Tourism is already a significant sector for Limerick in terms of visitor numbers, accommodation and employment. It is a job intensive sector, which encompasses a range of economic activities including aviation, hotels, B&Bs, pubs and restaurants, festivals, sport, exhibitions, and business conferences. The sector is at the core of the NPF to support objectives to build a more sustainable and economic model that is less reliant on Dublin and support the development of indigenous business, to avoid an overreliance on multinationals.

Census 2016 shows that there was a total of 4,302 employed in the Accommodation and Food Services Activities, which increased by 5.8% since 2011. Tourism accounts for 4.8% of total employment in Limerick, which was just slightly lower than the national average of 5.1%. However, the numbers employed indirectly in the tourism sector is actually much higher as aviation, transport and retail are not included in this category. A successful tourism sector also creates significant spin off benefits for the agriculture sector.

The most recent data from Fáilte Ireland shows that 647,000 overseas tourists travelled to Limerick in 2017, generating €261 million in revenue. There were 284,000 domestic visitors during 2018, and €46 million in revenue was generated. However, Limerick is lagging behind

other counties including Clare, Galway, Cork and Kerry in terms of both overseas and domestic visitors.

According to Fáilte Ireland there were 27 registered hotels in Limerick in 2018, with a combined 2,191 rooms and 5,222 beds. In terms of occupancy for 2019, Trending.ie reports show that Limerick's yearly occupancy is only marginally down 0.1% to 73.5%, but remains behind the national occupancy of 77.2%, highlighting potential for future growth in the long term. The tourism sector in Limerick performed well with RevPAR has grown by 3.7% in 2019, compared to a national decline of 0.6%.

#### **6.4 – LIMERICK'S TOURISM ASSETS**

Limerick forms part of the Wild Atlantic Way project, stretching 2,500km from the Inishowen Peninsula in Co. Donegal to Kinsale in West Cork. Limerick has been designated a Wild Atlantic Way Gateway City, a base from where tourists explore the Wild Atlantic Way and encourage growing tourism. Tourism assets in Limerick include, but are not limited to the King's Island Medieval Core - King John's Castle, St. Mary's Cathedral, Limerick City Walls, Treaty Stone, Red Mile, Hunt Museum, the Milk Market, the Shannon River walk, Georgian Limerick City, Lough Gur, Ballyhoura Mountain Bike Trails, Kilmallock's Medieval walled town, Foynes Flying Boat museum and the rich heritage throughout Limerick's towns and villages, including, the Early Christian monastery at Mungret. In this regard, Limerick a sporting capital, is well positioned to benefit from further investment in the tourism industry.

The most recently published report<sup>4</sup> on visitors to top fee-paying attractions in 2017, shows that Limerick was not included in the listing. Limerick attractions, such as King John's Castle, the Limerick City Gallery of Art, the Hunt Museum and the Ballyhoura Mountain Bike Trails did not feature on the 2017 listing. Furthermore, as a result of Covid-19, the Shannon Group will open Bunratty Castle & Folk Park and King John's Castle for a 6-week period and temporarily close at the end of the summer season on the 31st August 2020. This highlights the issues that tourism attractions and businesses are facing in 2020. Limerick is underperforming in terms of tourism visitor attractions, which will be further exacerbated by the current crisis.

In recent years, the café and restaurant sector has expanded and provide an important source of employment in the city. The transition to Irish Town and the Milk Market area offers a concentration of restaurants, bars and nightclubs, which represent the core of the night time economy. The food and entertainment sector has positively contributed to the attractiveness and quality of the city centre for workers, residents and visitors alike. New visitor attractions such as a craft brewery has opened, while the Engage Rugby Experience Museum in the heart of the city centre is under construction.

High quality international connectivity provides a unique opportunity for Limerick City to grow in the 'city break' market, to take advantage of the tourism assets of the wider region, and to compete in the annual programme of festivals and sporting events internationally. Music and drama, arts and creativity is showcased in a diverse range of festivals and events

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<sup>4</sup>Fáilte Ireland Visitor Attractions Survey 2017

that take place across the city. Limerick City is well positioned to capitalise on further investment in the tourism industry, when the industry begins to recover from the impact of Covid-19.

## **7.0 – Conclusion**

Limerick has experienced significant economic growth in recent years and has been performing well in terms of economic indicators such as high levels of disposable incomes, housing affordability commute times, which has made Limerick an attractive location for talent and investment. However, despite this, Limerick has a number of economic challenges which must be addressed. Population growth in Limerick has been relatively lower than national trends. Limerick continues to have a relatively high unemployment rate which will be further exacerbated by the current Covid-19 crisis. The labour force participation rate has significant unrealised potential to contribute to future economic growth. Attracting migrant labour and increasing female labour force participation will be important for this. While commute times are low in Limerick, there is an overreliance on cars, so more sustainable transports models will need to be evaluated. The tourism and retail sectors are currently facing a major crisis and will take a considerable time to recover from the Covid-19 pandemic. The National Planning Framework emphasises that future economic growth will be enterprise and employment led. This will require attracting people to live, work and invest in Limerick, which in turn will require a diversified sectoral mix, adequate housing, good transport links and quality of life factors, which should be considered in the preparation of the proposed Limerick Development Plan.

