REPUCON CONSULTING

Comhairle Cathrach & Contae Luimnigh
Limerick City & County Council

LIMERICK CITY & COUNTY COUNCIL

July 2024

Wickham Street To Clare Street Active Travel

Independent Economic Assessment

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Section 1

Introduction & Overview

1.1 INTRODUCTION & OVERVIEW

Limerick City and County Council (LCCC) appointed Repucon Consulting to undertake an independent economic assessment of the proposed Wickham Street to Clare Street Active Travel Scheme. The proposed scheme will provide a connection between existing Active Travel measures on Parnell Street and the UL to Clare Street Greenway, delivering an Active Travel route between the University of Limerick and the public transport hub at Limerick Colbert rail and bus station. Four potential route options have been identified by LCCC. The yellow and pink route options are the routes under consideration within this assessment.

The key objectives of the economic assessment study are:

- Assess the potential economic impact of Active Travel investment on the pink and yellow route options.
- Audit of businesses in operation across the yellow and pink routes to understand the economic operational environment.
- Understand business attitudes to potential Active Travel investment and perceived impact on business performance.
- Examine consumer attitudes to Active Travel investment and possible impact on economic activity on the route options.
- Review the experiences of national and international urban communities following investment in comparable active travel projects.

PROJECT METHODOLOGY

The project methodology included a programme of primary research conducted among businesses on the yellow and pick routes, Milk Market traders and the broader community. A programme of secondary research examined the economic impact of active travel and pedestrianisation investment across a number of national and international locations. Additional analysis examined the most recent CSO data to understand current commuting and active travel behaviours in Limerick City. Additional traffic and pedestrian counts were undertaken by LCCC and used within the economic assessment analysis.

Research was conducted among businesses located directly on the yellow and pink routes following the completion of a business audit to understand the operational environment across both routes. Prior to the business research phase, correspondence was issued by LCCC to businesses along the yellow and pink routes. The purpose of the communication was to advise of the economic assessment study and highlighting the opportunity to input into the research. A business survey was subsequently issued to businesses on both routes for businesses to input into the independent research. In order to encourage a higher level of participation in the research, Repucon Consulting undertook follow-up visits to business premises to provide a further option to complete the survey in person or prompt businesses to avail of the self completion option. A total of 30 businesses participated in the survey. **54%** of responses were from businesses on the pink route and **46%** received from businesses on the yellow route.

In addition to the business survey, additional research was undertaken among market traders. This included Milk Market traders and casual traders outside the Milk Market site. Representatives of Repucon Consulting were introduced by management to traders inside the Milk Market and were provided with a letter and survey completion details. The same approach was employed among casual traders around the Milk Market area, facilitated by LCCC executives with responsibility for the market operations. A total of 25 traders provided feedback through the survey process. **70%** of respondents operate within the Milk Market. The remaining **30%** are casual traders operating on the streets outside the Milk Market.

Consumer research was conducted over a week long period that captured data on weekdays and over two weekends in November to ensure an understanding of the varying motivations and reasons for visiting the area. A total of 362 surveys were completed across the yellow and pink routes. This examined attitudes to Active Travel, possible impacts or changes to their consumer behaviours arising from possible Active Travel investment or changes to their intention to visit the area for economic purposes.

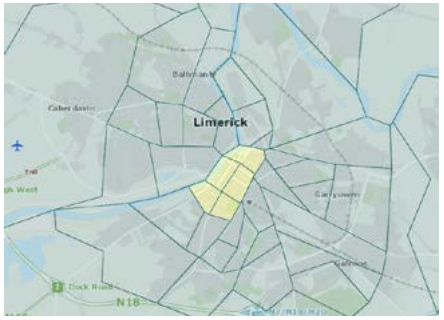
To understand consumer and traffic movements into and around the area, LCCC conducted analysis of traffic and pedestrian flows across a number of sampling points in September. The data was analysed to understand consumer flows and provide an understanding of how the community access key areas along the route e.g. influence of the Milk Market on pedestrian movements. Observation studies were undertaken to observe parking

and consumer access behaviour along the route on Saturdays. This was supplemented by a parking survey conducted by LCCC in September.

1.2 LIMERICK CITY TRAVEL & COMMUTING PATTERNS

For the purpose of the economic assessment, CSO data has been used to define the city and suburban areas area. The city area[1] has experienced a **28%** population increase between 2022 and 2016 with the city and suburbs recording a **8.6%** increase in population.

Limerick City & Suburbs (Census 2022)
(Source: www.CSO.ie)



Limerick City Centre (Limerick Chamber)
(source: www.cso.ie)

POPULATION

Population Growth 2016 - 2022

	2016	2022	% Change
Limerick City and Suburbs	94,192	102,287	8.6%
Limerick City Centre	6,071	7,769	28%

[1] Limerick Chamber – Limerick City Centre Report (November 2023)

(source: CSO, Census 2022)

In 2022 the population of Limerick city and suburbs was 102,287, an increase of **8.6%** compared with 2016. The city centre population is estimated to be 7,769 based on Limerick Chamber examination of the socio-economic profile of the city centre formed by the five Electoral Districts of Custom House, Dock A, Dock B, Shannon A and Shannon B. Between the Census of 2016 to 2022 each Electoral District (ED) experienced above average population growth when compared to the Limerick Metropolitan Area as a whole. Dock A, Shannon A and Shannon B all experienced population growth of more than **30%** and are the top three ED's in percentage growth of the 47 ED's in the Limerick Metropolitan Area.

COMMUTING PATTERNS

Means of Travel to Work, School or College – Limerick City & Suburbs

Means of Travel	2016			2022			% Change 2016 -2022
	Limerick City & Suburbs		State	Limerick City & Suburbs		State	
	No.	%		No	%		
On Foot	12,993	23.8%	13.9%	13,196	22.2%	14.8%	1.6%
Bicycle	1,620	3.0%	2.7%	1,807	3.0%	3.2%	11.5%
Bus, minibus or coach	4,229	7.8%	10.2%	4,834	8.1%	10.5%	14.3%
Train	120	0.2%	2.7%	159	0.3%	2.8%	30.5%
Motorcycle or Scooter	125	0.2%	0.3%	184	0.3%	0.3%	55.2%
Car	33,188	61.0%	57.9%	33,543	56.5%	63.1%	1.1%
(Car Driver)	*(22,396)*	*(41.1%)*	*(39.3%)*	*(21,676)*	*(36.5%)*	*40.7%*	*(-3.2%)*
(Car Passenger)	*(10,792)*	*(19.9%)*	*(18.6%)*	*(11,867)*	*(20.0%)*	*22.4%*	*(9.9%)*
Van	1,239	2.3%	4.2%	1,241	2.1	4.8%	0.1%
Other	73	0.1%	0.4%	97	0.2%	0.5%	32.8%
Work mainly at or from home	838	1.5%	3.1%	4,264	7.1%	-	408.8%
Total	**54,425**	**100%**		**59,325**	**100%**		
Not Stated	*3,731*			*10,372*		*8.0%*	

(source: CSO, Census 2022)

In Census 2022, **22%** of people commute to work, college or school on foot. Four-in-ten of those all those commuting travel for 30 minutes or less. Additionally, **57%** of the households in the five ED's do not own a car. Over one-third (**37%**) are one-car households.

At Census 2022, more than 1,800 people living in the city and suburbs are commuting by bicycle. This represents an increase of **11.5%** between 2016 and 2022 in the number of people cycling to work, school and college.

The number of people commuting by bus, minibus or coach increased by 4,834 an increase of **14.3%** in the intercensal period between 2016 to 2022.

Commuting by train increased from 120 to 159 people between the Census. Limerick Colbert Station is the only train station within the profile area considered, suggesting the number of people commuting by train refers to those travelling to work etc outside of the city.

Commuting by car remains the most popular means of travel. Approximately 33,500 either drive or are passengers in a car on their commute. This represents an increase of **1.1%** since the 2016 Census.

Census respondents that did not state their means of travel have been discounted from this assessment. In 2011, 3,731 (**6.4%**) of Census respondents did not state their means of travel. This increased in 2016 to 10,372 (**14.9%**) of respondents.

Journey Time to Work, School or College

Length of Commute	2016		2022			% Change 2016 -2022
	Limerick City & Suburbs		Limerick City & Suburbs		State	
	No.	%	No	%		
Under 15 Minutes	19,789	38.0%	17,649	34.6%	21.1%	-10.8%
¼ hour – under ½ hour	21,610	41.5%	21,731	42.6%	28.1%	0.6%
½ hour – under ¾ hour	7,536	14.5%	8,089	15.9%	20.9%	7.3%
¾ hour – under 1 hour	1,325	2.5%	1,498	2.9%	7.6%	13.1%
1 hour – under 1 ½ hour	1,087	2.1%	1,241	2.4%	7.8%	14.1%
1 ½ hours and over	694	1.3%	842	1.6%	3.1%	21.3%
Total	**52,041**	**100%**	**51,050**	**100%**		
Not Stated	*5,277*		*11,671*		*11.5%*	

(source: CSO, Census 2022)

In 2022, **35%** of those who commute to work, school or college had a journey of less than 15 minutes. More than four-in-ten (**43%**) stated their commute took between 15 and 30 minutes. In total, more than 39,000 people in Limerick city and suburbs spend less than 30 minutes on their commute. At Census 2022, 2,083 people reported spending more than one hour commuting to work, school or college. This represents an increase of 302 people since 2016.

Number of Households with Cars

Number of Households with cars	2016		2022		% Change 2016 -2022
	Limerick City & Suburbs		Limerick City & Suburbs		
	No.	%	No	%	
No Motor Car	8,119	24.1%	7,023	21.9%	-13.4%
1 Motor Car	14,996	44.5%	14,180	44.1%	-5.4%
2 Motor Car	8,884	26.3%	8,751	27.2%	-1.4%
3 Motor Car	1,315	3.9%	1,602	5.0%	21.8%
4 or more Motor Cars	365	1.1%	575	1.8%	57.5%
Total	**33,679**	**100%**	**32,131**	**100%**	

(source: CSO, Census 2022)

In 2022, **22%** of households in the Limerick city and suburbs area did not own a car. Between 2016 and 2022 the actual number of households without a car decreased from 8,119 to 7,023 a reduction of more than **13%**.

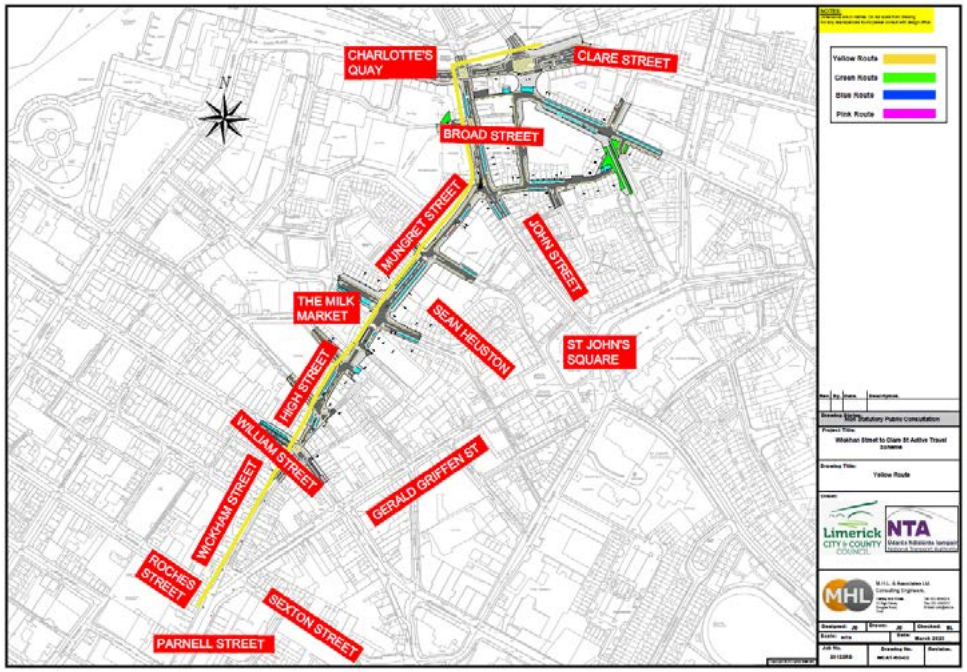
Section 2

Active Travel - Wickham Street to Clare Street

2.1 WICKHAM STREET TO CLARE STREET – ROUTE OVERVIEW

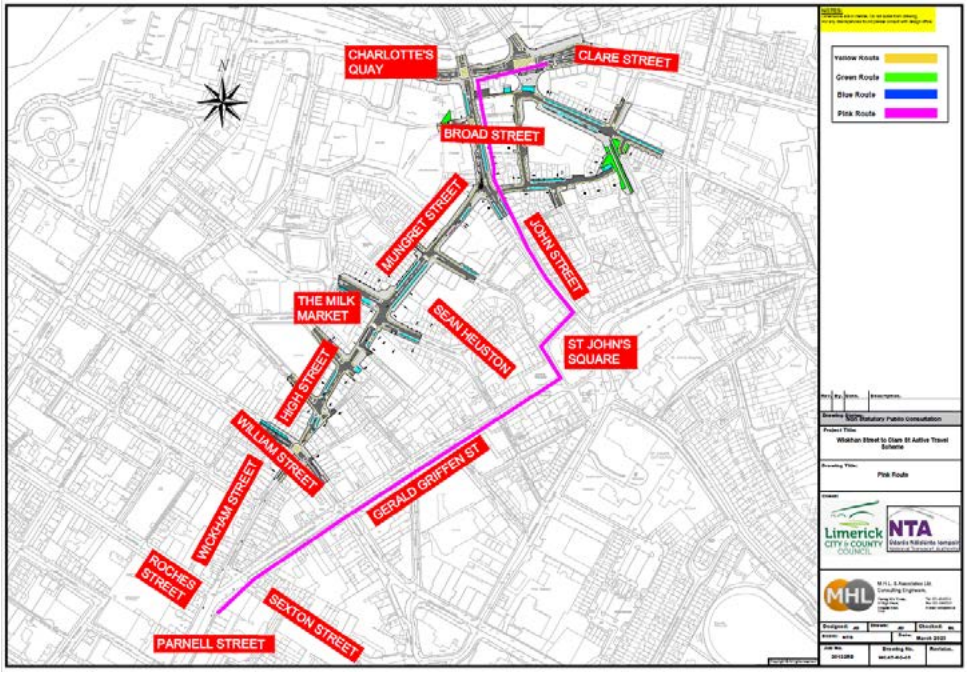
Two options are analysed within this economic assessment, the yellow and pink routes.

YELLOW ROUTE



The yellow route is a direct route, providing cycle facilities in two directions from north to south between Wickham Street and Clare Street via High Street, Mungret Street and Broad Street. The yellow routes passes the existing Transport for Ireland (TFI) Bike Share Station at the Milk Market.

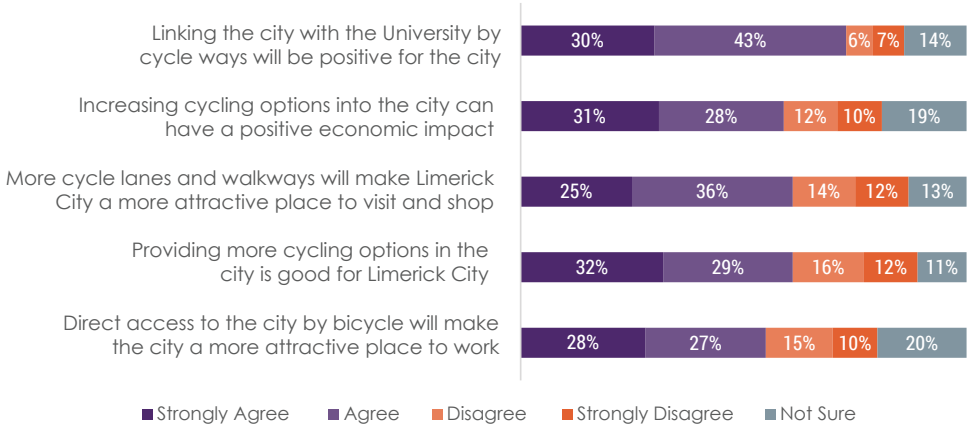
PINK ROUTE



This route provides cycle facilities in both directions from north to south from Gerald Griffin Street to Clare Street via St John's Square, John Street and Broad Street. The pink route bypasses the existing Transport for Ireland (TFI) Bike Share Station at the Milk Market. It connects to the TFI cycle stand at St John's Square.

2.2 ATTITUDES TO ACTIVE TRAVEL

Community Attitudes to Active Travel in the City



The public / community feedback was largely positively disposed to Active Travel. Across each of the areas examined, the majority of consumers agreed that increased cycling and walking measures would have a positive impact on the city. Members of the public showed strongest support for:

- linking the city with UL.
- the provision of more cycling options being good for the city.
- more cycle lanes and walkways making the city a more attractive place to visit and shop.

Three out of four respondents (**73%**) agree or strongly agree that linking the city with the university by cycle ways will be positive for the city.

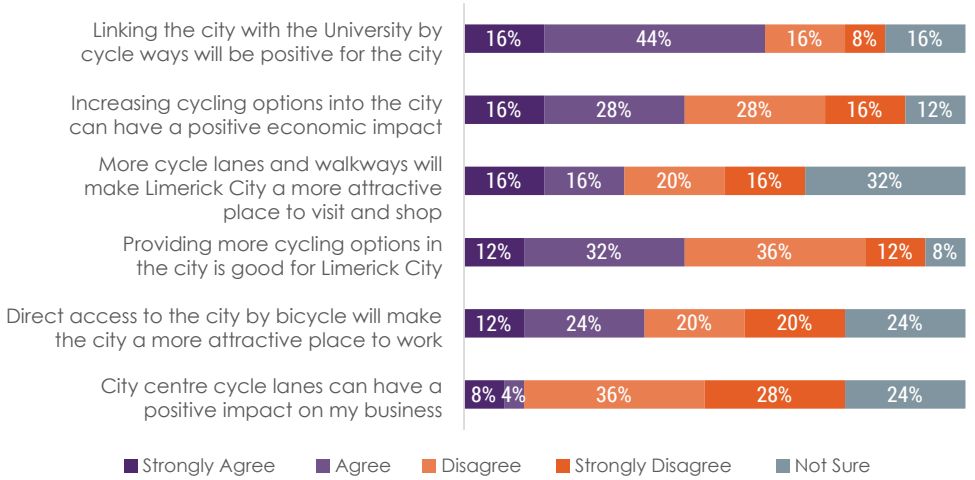
31% strongly agree that increasing cycling options can have a positive economic impact. A further **28%** agreed with the statement. **12%** disagreed with a further **10%** strongly disagreeing that increasing cycling options can have a positive economic impact.

Three out of five (**61%**) of the public agree or strongly agree that more cycle lanes and walkways will make Limerick City a more attractive place to visit and shop, double the proportion of business owners (**32%**) who agreed or strongly agreed with the statement.

32% of consumers strongly agree that providing more cycling options in the city is good for Limerick City. A further **29%** agree with the statement. **16%** disagree while **12%** strongly disagree that more cycling options would be good for the city.

55% of consumers agree while **25%** disagree with the statement that direct access to the city by bicycle will make the city a more attractive place to work.

Businesses Attitude to Active Travel in the City



Business respondents recorded higher levels of disagreement on the possible impact of Active Travel in the city. The research recorded a level of recognition among businesses of the benefits of linking the city with UL. Overall businesses expressed general disagreement on the possible benefits of Active Travel investment in the city. The highest levels of disagreement were around the likely positive impact on their business and the impact of Active Travel on the city as a place to shop and visit.

Six-in-ten (**60%**) of respondents to the business survey agreed that linking the city to the university by cycle ways will be positive for the city. **16%** disagreed and **8%** strongly disagreed that cycle ways linking the city and university would be positive for the city.

16% of businesses strongly agreed and **28%** agreed that increasing cycling options into the city can have a positive economic impact. The same proportions disagreed with the statement with **28%** disagreeing and **16%** strongly disagreeing.

A third of businesses (**32%**) agree that more cycle lanes and walkways will make Limerick City a more attractive place to visit and shop. Conversely **20%** disagree and **16%** strongly disagree with the statement.

42% of business agree that providing more cycling options in the city is good for Limerick City, while **48%** disagree.

36% of businesses agree or strongly agree that direct access to the city by bicycle will make the city a more attractive place to work. Conversely **40%** either disagree or strongly disagree with the statement.

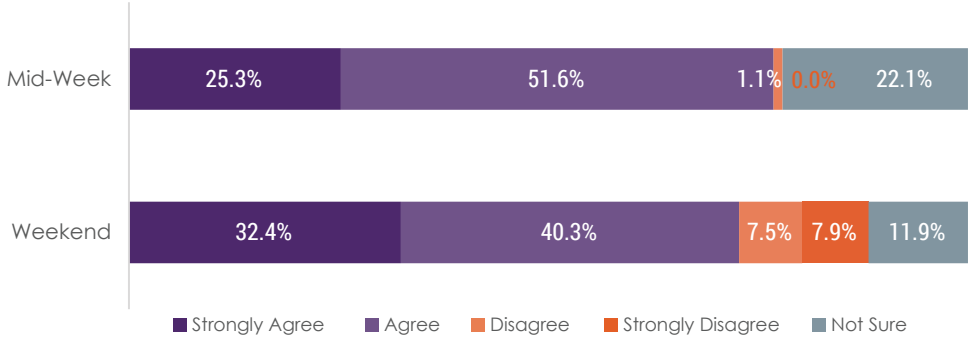
In relation to the impact on their own business, **12%** of businesses agree that cycle lanes will have a positive impact. **64%** do not consider cycle lanes will have a positive impact on their business.

2.3 MID-WEEK VS WEEKEND ANALYSIS: PUBLIC SURVEY

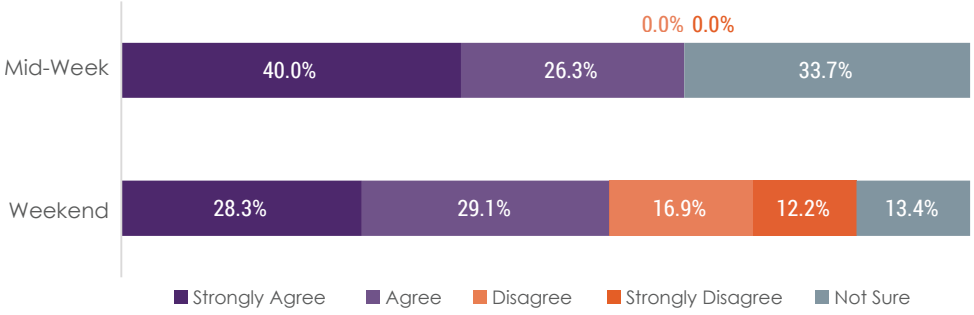
As evident from section 2.2. public attitudes to potential Active Travel impacts is largely positive. Examining the attitudes of mid week versus weekend survey participants highlights a higher level of agreement that Active Travel can have a positive economic impact on the area. Significantly, they represent a cohort that visit the city areas featured in the route options with greater regularity and for a greater variety of reasons and i.e. work in the area, visiting the area to buy goods or services.

Respondents to the survey over the weekend revealed higher levels of agreement for the possible impact arising from linking the city to the university and improving the attractiveness of the city as a place to visit and shop.

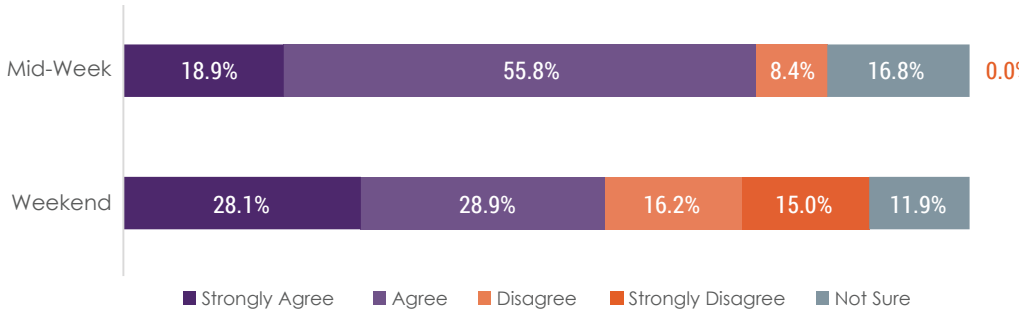
Linking the City to the University by Cycle Ways Will be Positive for the City



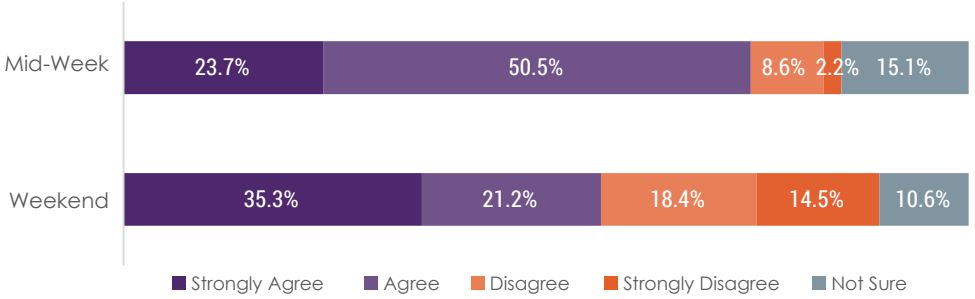
Increasing Cycling Options into the City Can Have a Positive Economic Impact



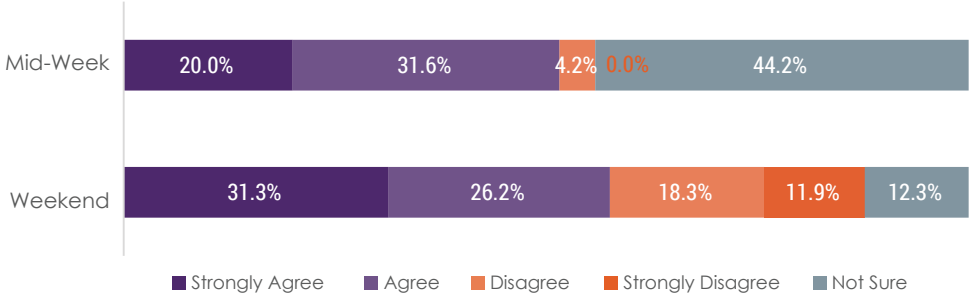
More Cycle Lanes and Walkways Will Make Limerick City a More Attractive Place to Visit and Shop



Providing More Cycling Options is Good for Limerick City



Direct Access to the City by Bicycle Will Make the City a More Attractive Place to Work



Section 3

National and International Research

3.1 INTRODUCTION

Schemes to transfer road space to sustainable modes of transport such as walking and cycling have been undertaken across the world for many decades. Many European cities now limit access to cars to elements of the city centre or suburbs. As cities have looked to move away from a focus on providing car access to retail and business centres, concerns have often been raised as to the impact that this would have on those businesses. High street shops and restaurants in particular have worried that such schemes would reduce car patronage and in turn have a large impact on their businesses. In response to this a wide range of studies have been undertaken to assess whether such concerns are valid and what, if any, impact such schemes have on businesses.

This section looks at the national and international evidence around the impact of pedestrianisation and cycle lanes on businesses within the catchment area. It looks at four key areas which are relevant to the Wickham Street to Clare Street Active Travel project. These are:

1. **The national context:** The direction of travel that Ireland has set out in relation to sustainable travel and climate change.
2. **The travel modes of shoppers:** Research on how shoppers travel in and out and how much they spend.
3. **The impact on businesses of improved cycling access:** Research on the impact of reducing car access and improving cycle access (including cycle lanes and additional cycle parking)
4. **The impact of pedestrianisation on businesses:** Research on the impact of turning car access into pedestrian spaces.

This section then draws together some key conclusions around the likely impacts of the proposed scheme, based on the evidence set out. This section is based on secondary analysis of the publicly available research from jurisdictions around the world.

3.2 NATIONAL CONTEXT

Ireland's policy goal, in common with all other EU countries, is to shift away from fossil fuelled cars and move towards more sustainable modes of transport. The aim of this policy is to deliver a reduction in Greenhouse Gas emissions and encourage greater climate change resilience. The policy around sustainable transport is set out in the National Sustainable Mobility Policy[1].

*"The policy aims to deliver at least 500,000 additional daily active travel and public transport journeys by 2030 and a **10%** reduction in the number of kilometres driven by fossil fuelled cars. It will make it easier for people to choose walking, cycling and use public transport daily instead of having to use a petrol or diesel car."*

This **10%** targeted reduction in kilometres travelled by fossil fuelled cars has now been increased to **20%** in the latest Climate Change Action Plan (CAP23)[2]. This ambitious target needs to be achieved over the next seven years and to achieve that changes will be needed across all areas of the transport economy in Ireland.

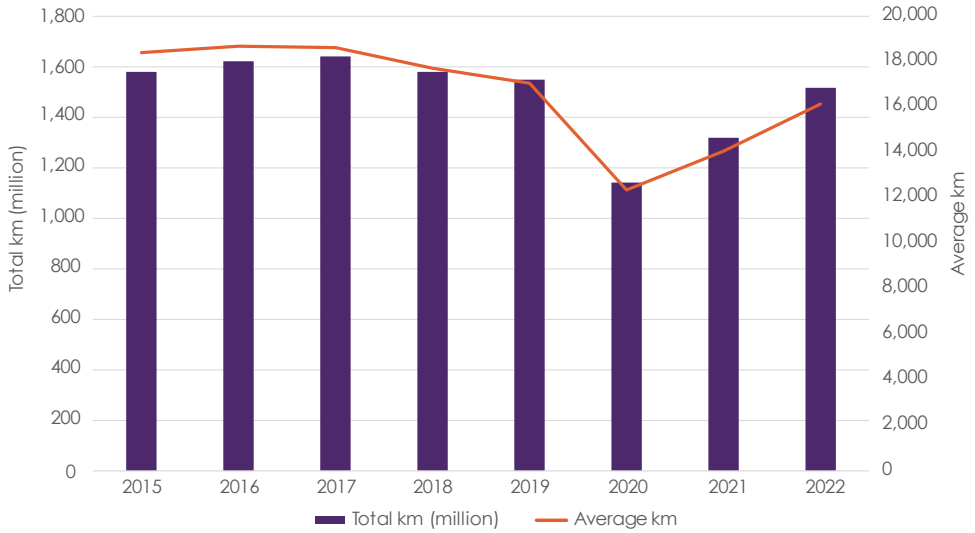
This change is already happening at both the national and regional level. As shown in in Figure 1, in County Limerick there has been **17%** drop in total kms travelled and a **24%** drop in average journey length per annum[3] between 2017 and 2021. Whilst this has undeniably been impacted by the Covid-19 lockdowns, the downwards trend in car journeys had begun before that point, and government policy is clearly focussed on continuing that trend. Data for 2022 shows an increase in journeys compared with 2020 and 2021, there has been an 8% drop in total kms travelled and a 13% drop in average journey length per annnum between 2017 and 2022.

[1] DfT: Sustainable mobility policy, 2022, gov.ie - National Sustainable Mobility Policy (www.gov.ie)

[2] Climate Change Action Plan 2023, 94a5673c-163c-476a-921f-7399cdf3c8f5.pdf (www.gov.ie)

[3] CSO: Road Traffic Volumes of Private Cars, TMA18, https://data.cso.ie/table/THA18

Figure 1: Vehicle population and kms travelled, County Limerick, 2000 - 2022



Source: CSO

The impact of climate change and Covid-19 has not just been felt in travel patterns. It has also had a direct impact on shopping habits. The lockdowns led to a significant increase in online shopping with **69%** of internet users purchasing goods and/or services online in 2020, an increase of six percentage points on 2019[4]. At the same time, climate change concerns have led to a preference for locally sourced and produced goods. A 2022 Study[5] found **46%** of consumers are expected to increase purchases from local producers.

The result of these changes is a national environment where shoppers are more environmentally aware and who are encouraged to make shorter journeys to shops. This should result in a continued move away from cars and towards other modes of transportation.

[4] CSO: Internet Purchases 2020, Internet Purchases - CSO - Central Statistics Office

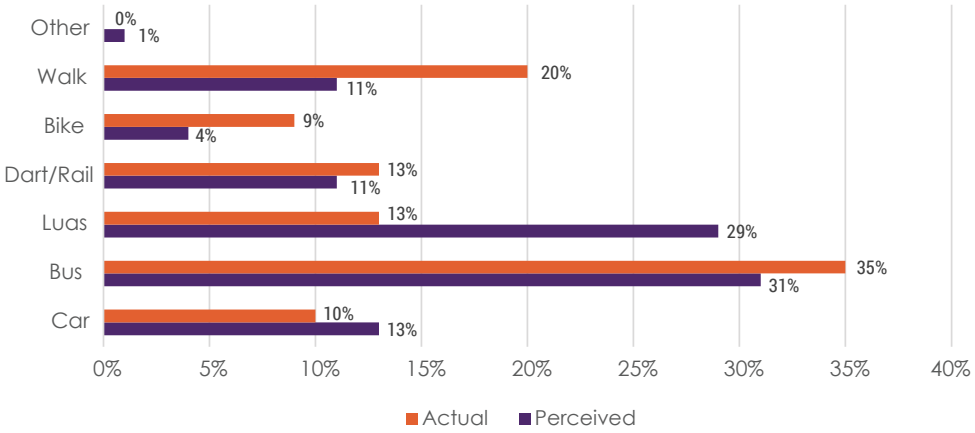
[5] PWC: Irish Consumer Insights Pulse Survey, 2022, Irish Consumer Insights Pulse Survey 2022 | PwC Ireland

3.3 TRAVEL MODES OF SHOPPERS – PERCEIVED VERSUS ACTUAL

Whilst the national trend is towards a move away from cars (and especially Internal Combustion Engine (ICE) cars), they remain an important mode of transport for shoppers. Research has, however, suggested that they might not be quite as important as some business owners believe.

This was studied by the Dublin Institute of Technology (now TUD) in 2011[6]. They undertook a survey of shoppers and shop owners to look at the difference between perceived modes of travel and actual modes of travel on both Grafton and Henry Street in Dublin. The results of these surveys are presented in Figure 2 and Figure 3. The results showed that on both streets the shop owners overestimated the numbers arriving by car. For instance, the study found that **9%** of shoppers on Henry Street arrived by car compared to shop owners' belief that **19%** did. At the same time, they underestimated the number of shoppers arriving by bus by similar amounts.

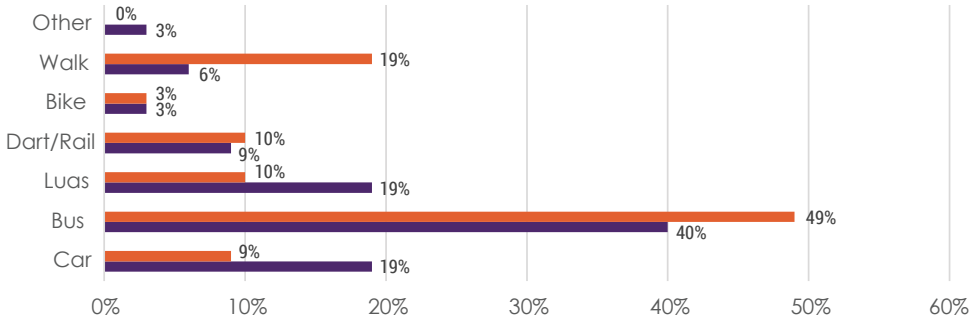
Figure 2: Actual and perceived modes of travel, Grafton Street, 2011



Source: Report on Shopper Travel Behaviour, TUD, 2011

[6] TUD: Report on Shopper Travel Behaviour, 2011, Report on shopper travel behaviour in Dublin City Centre (tudublin.ie)

Figure 3: Actual and perceived modes of travel, Henry Street, 2011



Source: Report on Shopper Travel Behaviour, TUD, 2011

This result is not confined to Dublin. A similar study[7] was undertaken in Berlin in 2021. Retailers overestimated car travel by 15 percentage points and underestimated bike usage by 3 percentage points. Equally a study in Toronto[8] found that retailers believed that **25%** of shoppers arrived by car, whereas in reality it was only **10%**.

In addition, there is evidence to suggest that business owners tend to overestimate the distance than customers travel from. The Berlin study found that businesses believed just over **10%** of customers travelled less than 1km, whereas it was in fact **50%.** A similar result was found in a study in Bristol[9] where **60%** of customers reported living within one mile of their preferred shops.

[7] Schneidemesser & Betzien: Local Business Perception vs. Mobility Behavior of Shoppers: A Survey from Berlin, 2021, Local Business Perception vs. Mobility Behavior of Shoppers: A Survey from Berlin | Published in Findings (findingspress.org)

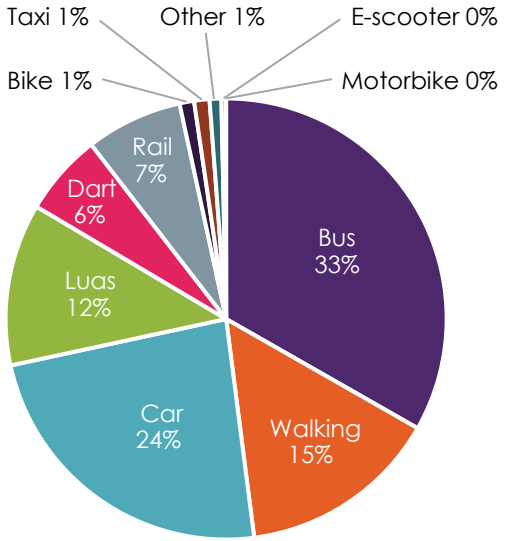
[8] Clean Air Partnership: Economic Impact Study of Bike Lanes in Toronto's Bloor Annex and Korea Town Neighbourhoods, 2017, Economic Impact Study of Bike Lanes in Toronto's Bloor Annex and Korea Town Neighbourhoods, Summary Report (tcat.ca)

[9] Living Streets: Making the case for investment in the walking environment: A review of the evidence, 2011, 2011-making-the-case-full-report.pdf (livingstreets.org.uk)

3.4 SPENDING BY MODE OF TRANSPORT

The importance of shoppers who arrive on foot, cycle or bus is also shown in surveys on total spend by mode of transport. A National Transport Authority (NTA) survey in 2022 for Dublin[10] and Cork[11] studied the total spend of consumers by mode of travel. The key results of these surveys are shown in Figure 4 and Figure 5. As can be seen, spending by shoppers arriving by car does not form the majority of spend within either city centre. In fact, in both cities the largest share of spend comes from those arriving by bus. These surveys show that this is due to shoppers travelling by car tending to spend more per trip, however travelling less often resulting in a lower overall spend.

Figure 4: Total spend by mode of transport, Dublin, 2022

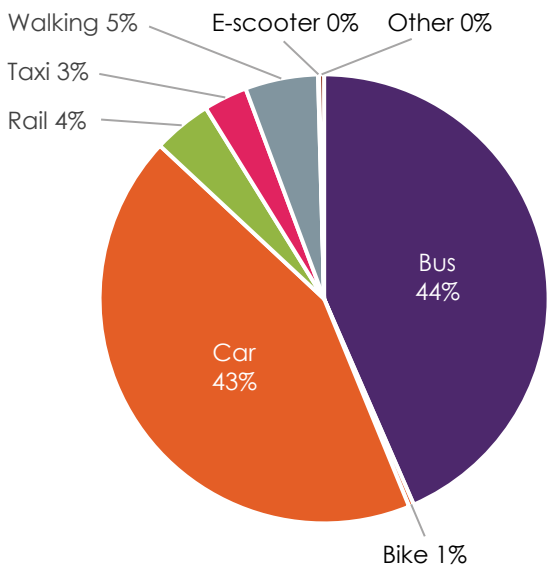


Source: NTA Shopper Survey

[10] NTA: Dublin City Centre Shopping Survey, 2022, Cover Quantitative Research Project Delivery (nationaltransport.ie)

[11] NTA: Cork City Centre Shopping Survey, 2022, Cover Quantitative Research Project Delivery (nationaltransport.ie)

Figure 5: Total spend by mode of transport, Cork, 2022



Source: NTA Shopper Survey

Again, these findings are not confined to just Ireland. Similar questions have been studied in a number of other reports including:

- **Portland (USA).** A study[12] found that cyclists spent up to $12 per month on average more than car users.
- **Copenhagen (Denmark)[13]**. A study found that in total, pedestrians and cyclists account for **55%** of all revenue in Copenhagen, and **58%** of all shopping trips.
- **San Fransico (USA)**: A survey[14] found that most travellers get to downtown San Francisco by taking transit or walking, regardless of their income. Travelers using these modes spend more per month than those traveling by car, because they come more frequently to engage in recreational activities.
- **London (UK)**: A review of the evidence undertaken by Transport for London (TfL)[15] found that "People walking and cycling visit high streets more frequently and spend more money there compared to people in cars".

3.5 IMPACT ON BUSINESS OF IMPROVED CYCLE ACCESS

The evidence presented in the previous section shows that walkers and cyclists are more important to retail sales that might otherwise be expected. However, shoppers arriving by car still form a large section of retail spending (**43%** in Cork) and this segment remains important to business owners. Therefore, it is important to understand whether limiting access to cars will have a negative impact on overall sales.

This impact has been studied extensively in a wide range of studies. These studies have tended to be post project evaluations of implemented schemes as well as pieces of meta-analysis drawing together key conclusions from literature reviews. These studies have looked at both the impact of reducing car access through the provision of cycling lanes as well as transforming car parking into cycle parking.

[12] Clifton et al: Consumer Behavior and Travel Choices: A Focus on Cyclists and Pedestrians, 2012, Microsoft Word - ConsumerBehaviorAndTravelChoices_submitted (nacto.org)

[13] City of Copenhagen: Copenhagen City of Bicycle Account, 2012, Copenhagen's Bicycle Account 2012 (stateofgreen.com)

[14] Bent & Singa: Modal choices and Spending Patterns of travellers to Downtown San Francisco: Impacts of Congestion pricing on retail trade, 2009, Modal Choices and Spending Patterns of Travelers to Downtown San Francisco, California: Impacts of Congestion Pricing on Retail Trade - Elizabeth M Bent, Krute Singa, 2009 (sagepub.com)

[15] TfL: Walking and Cycling: The economic benefits, Walking and cycling: the economic benefits (tfl.gov.uk)

IMPROVING CYCLE LANES

There is a large body of evidence as to the impact on businesses of repurposing roads to cycle use. The overall conclusions of this work is that such schemes have had a neutral or positive impact on the overall business environment.

A meta-analysis of 23 studies in America[16] on the impact of the installation of walking or cycling facilities found that "*[they have] … positive or non-significant economic impacts on retail and food service businesses abutting or within a short distance of the facilities*". The results were found to be similar regardless of whether car parking or travel lanes were removed or reduced to make room for the active travel facilities.

Further evidence was found in a separate American meta-analysis study[17]. This study found that "*Street improvements had either positive or non-significant impacts on corridor employment and sales*". In particular, it found that the food service industry seemed to gain the most from the addition of active travel mode investments. Retail industry was found to benefit in 9 out of the 14 case studies considered. The other five studies found either no impact (2 studies) or a mix of positive and negative impacts (3 studies). No study was found to suggest a purely negative impact on businesses.

Similar findings have been reported in other studies including:

- A UK report[18] which looked at a range of global case studies. This included a study in New York where pedestrian improvements at one junction increased local retail sales by **48%** and another where traffic management and public realm improvements in Kelso increased town centre footfall by **28%**.
- An American study[19] looking at a series of improvements in New York found that transferring a car lane to a bike lane on Vanderbilt Avenue increased sales by **103%** over a 3-year period (compared to a **18%** increase in sales for the overall borough of Brooklyn).
- A study of Healthy Streets in London (UK)[20] found that **83%** of all businesses surveyed felt that the scheme attracted more customers, **67%** felt that it increased customer spending and **85%** felt it was important for the overall business environment.

In addition to the overall impact on consumer spending, cycling infrastructure has been found to have a particular impact on the tourist economy. In the UK a study[21] found that cycle tourists spend 9% more per head (£81) than other tourists and were more likely to be attracted to places with improved cycling facilities. This is supported by a study in New Zealand[22], where cycle tourists were found to spend around $250 more per trip than other similar tourists.

REDUCING CAR PARKING

The introduction of cycle facilities is often accompanied by the removal of car parking spaces in order to provide more parking for bikes. This removal of car parking has also often prompted concerns as to the impact on businesses and has therefore also been the subject of a number of studies.

These have tended to reflect the findings in studies of improving cycle lanes. The evidence available all points towards a positive impact on the shopping environment. This is mainly due to the significantly greater density of parking that can be achieved in cycle parks over car parking spaces.

[16] Volker and Handy: Economic impacts on local businesses of investments in bicycle and pedestrian infrastructure: a review of evidence, 2021, Economic impacts on local businesses of investments in bicycle and pedestrian infrastructure: a review of the evidence (tandfonline.com)

[17] NITC: Economic impacts of Bicycle and Pedestrian Street Improvements, 2019, Economic-Impacts-of-Street-Improvements-summary-report.pdf (wsd-pfb-sparkinfluence.s3.amazonaws.com)

[18] Living Streets: The Pedestrian Pound, 2018, pedestrian-pound-2018.pdf (livingstreets.org.uk)

[19] NY DoT: The economic benefits of sustainable streets, 2013, dot-economic-benefits-of-sustainable-streets.pdf (nyc.gov)

[20] TfL: Healthy Streets: A business view, 2018, Healthy Streets: A Business View (tfl.gov.uk)

[21] DfT: The value of cycling, 2016, The value of cycling (publishing.service.gov.uk)

[22] Ritchie and Hall: Bicycle Tourism and Regional Development: A New Zealand Case Study, 1999, (PDF) Bicycle Tourism and Regional Development: A New Zealand Case Study (researchgate.net)

Evidence in support of this conclusion includes:

- A review of the value of cycling for the Department for Transport in the UK[23] found that per square metre, cycle parking delivers five-times higher retail spend than the same area of car parking.
- An American study[24] found that transferring a car parking spot to bike parking could increase total commercial spending from $219.65 to $334.06 per day.
- A study in Australia[25] found even in a small suburb area of Melbourne, each square meter of parking space allocated to bikes generated $31 per hour compared to $6 per hour for space allocated to car parking.

Other business impacts

In addition to the direct commercial benefits that have been highlighted above, a number of studies have found that improving sustainable transport alternatives can have wider benefits to businesses as well. These are often overlooked in studies on the impact of sustainable transport but can have an important impact on the overall business environment.

These benefits include:

- **Productivity:** A study[26] reported that 73% of employees who cycle to work felt it made them more productive as a result and **54%** felt that they were happier and more energised as a result of commuting by bike.
- **Recruitment:** The same report also found that businesses saw good walking and cycling infrastructure as essential to attracting good members of staff.
- **Health:** A study in Holland[27] found that employees who cycle regularly take on average 1.3 fewer sick days compared to those who arrived by other means.

The public realm and pedestrianisation

The previous section considers the evidence around transferring car space into cycle lanes or parking. It shows that cyclists can have a major positive impact on sales and that the inclusion of better facilities for cyclists tends to lead to an improved business environment.

Pedestrianisation has been shown to deliver significant benefits to businesses through the delivery of a higher quality public realm which is more attractive to shoppers, and which makes them more likely to linger for longer within the pedestrianised area.

A report by TfL[28] found that overall improvements to the street environment could have a wide range of positive benefits. These included:

- An uplift of retail rental values of up to **7.5%** per annum. The improved public realm was felt to support businesses in competing against "out of town" shopping venues.
- A reduction in retail vacancy rates of up to **17%**.
- A **96%** boost in static (i.e standing or sitting) and 93% boost in active (i.e. walking) behaviours
- A **216%** increase in leisure based static activities (such as stopping at a café)

Similar results were found during the recent trial of pedestrianisation in Dublin City Centre. A study[29] found that businesses in the Grafton Street area saw takings up by between **40%** and **100%**. Other studies found similar results in

[23] DfT: The value of cycling, 2016, The value of cycling (publishing.service.gov.uk)

[24] CUNY: The economic impacts of transferring curb space from car parking to Bike share docks, 2013, 2013_Peters-Davidson-and-Santiago_Economic-Impact-of-Transferring-Curba-Space-form-Car-Parking-to-Bike-Share-Docks.pdf (nacto.org)

[25] Lee and Marsh: Recognising the economic role of bikes: sharing parking in Lygon Street Carlton, 2010, Recognising the economic role of bikes: sharing parking in Lygon Street, Carlton (tandfonline.com)

[26] TfL: Walking and Cycling: The economic benefits, Walking and cycling: the economic benefits (tfl.gov.uk)

[27] Hendricksen et al: The association between commuter cycling and sick absence, 2010, The association between commuter cycling and sickness absence - ScienceDirect

[28] TfL: Street Appeal: The value of street improvements, Street Appeal: The value of street improvements (tfl.gov.uk)

[29] RTE: Pedestrianisation of Dublin streets increased business, 2020, Pedestrianisation of Dublin streets increased business (rte.ie)

the UK. For instance, a study[30] found that in Exeter the removal of cars and the improvement of the public realm led to an increase in footfall of **30%** between 2002 and 2010. The same report found that the pedestrianisation of New Road Brighton had led to a **192%** increase in footfall despite a **93%** fall in traffic volume.

A pan European study looked at case studies of pedestrianisation schemes across Europe. It found that many suffered from initial opposition, however after a "*settling in period*" none demonstrated any of "*the predicted traffic chaos*". *For instance, the case study of Gwent (Belgium) found that the closure of the entire city centre to traffic resulted in* "… a pleasant and lively city centre. A lot of events (open-air arts festival, open-air music events) are now possible in very fine surroundings. The atmosphere for shopping is now better as well, as no cars can possibly bother shoppers".

A review of pedestrianisation studies in Germany and UK[31] over a 25-year period found **83%** of retail business, **28%** of hotels and **63%** of restaurants reported an increase in business. It was, however, found in some cases that there was a reduction in turnover during the transition period.

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[30] Living Streets: Making the case for investment in the walking environment: A review of the evidence, 2011, 2011-making-the-case-full-report.pdf (livingstreets.org.uk)

[31] Hass-Klau, C. , Impact of pedestrianisation and traffic calming on retailing: A review of evidence from Germany and UK, 1993, Impact of pedestrianization and traffic calming on retailing A review of the evidence from Germany and the UK | Scinapse

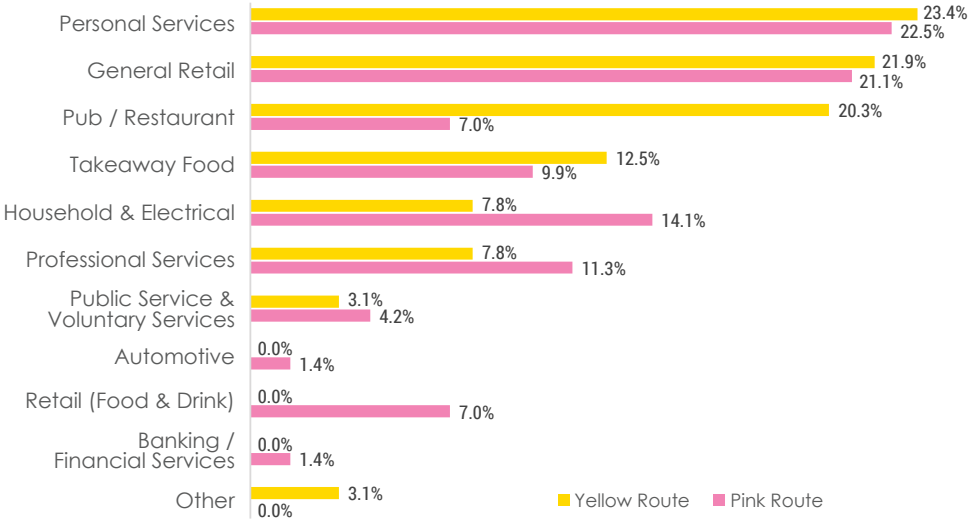
Section 4

Business Research – Yellow & Pink Routes

BUSINESS AUDIT OF YELLOW AND PINK ROUTES

An audit of the yellow and pink routes was undertaken to determine the number and nature of businesses active on both routes. A total of 64 businesses were in operation on the yellow route with 71 businesses on the pink route. Of these, eight were located on Broad Street or Clare Street which are common to both routes. There were 20 vacant or derelict properties identified on each route, seven of which were common to both routes.

Nature of Business: Analysed by Yellow & Pink Route



The business categories as outlined include the following mix of businesses on both routes:

- Personal Services – e.g. hair and beauty salons, doctors and dental surgeries
- General Retail – retail outlets including clothing, technology, jewellery, pharmacies and charity shops
- Pubs/restaurants – hospitality businesses including bars, restaurants and cafes
- Takeaway food – daytime and evening takeaway food outlets
- Household and Electrical – businesses offering repair services, DIY and large household retail goods including furniture and carpets
- Professional Services – legal, accountancy and other office-based services; funeral services, driver training
- Public & Voluntary Health– HSE and charitable service providers
- Banking & Financial
- Automotive Trade – Sale and repair of vehicles
- Others – including tourist attractions, casinos

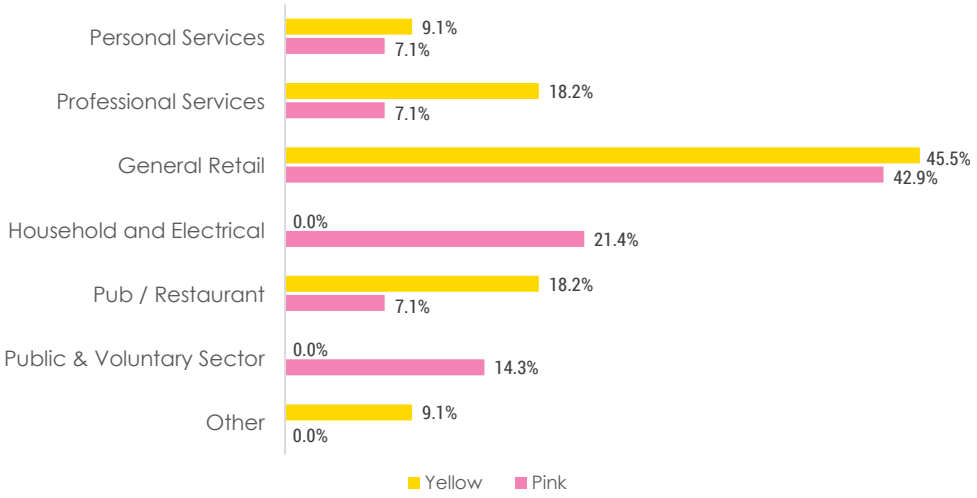
Personal services are the most common type of business accounting for approximately **23%** of businesses found on both routes. General retail businesses represent **22%** and **21%** of businesses on the pink and yellow routes respectively. A further **7%** of businesses on the pink route are involved in retail of food and drink.

One-third of businesses on the yellow route comprise Pubs/restaurants (**20%**) or takeaway food outlets (**12.5%**) illustrating the evening time and weekend economy present on the route. On the pink route pubs/restaurants account for **7%** of businesses with takeaway food outlets representing **10%**.

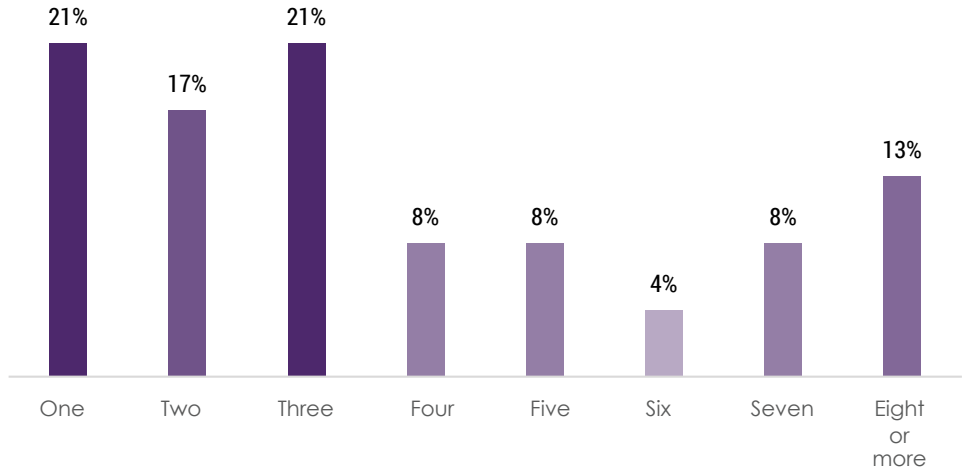
Household and electrical retailers and services account for **14%** of businesses on the yellow route compared with **8%** on the pink route. Professional services amount to **11%** of businesses on the yellow route compared with **8%** on the pink route.

BUSINESS PROFILE – YELLOW & PINK ROUTES

Responses by Route

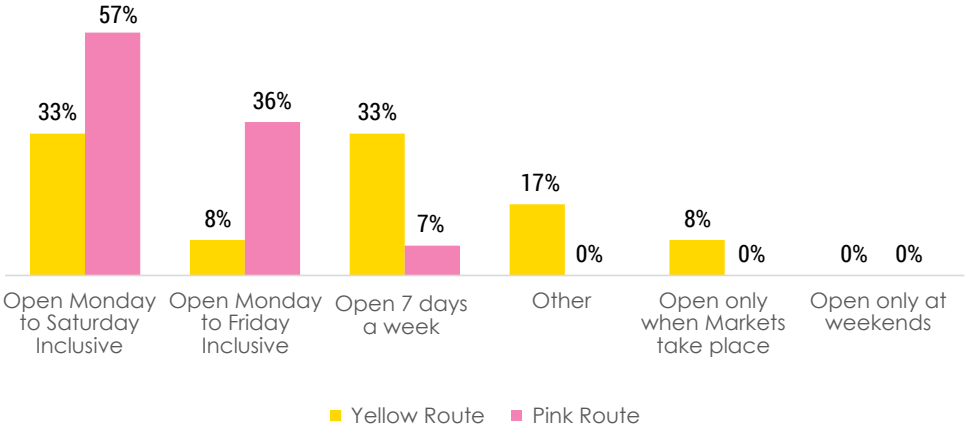


Number of Employees



Six-in-ten (**59%**) of participating businesses stated that their business had three or less employees. Businesses with eight or more employees accounted for **13%** of responses.

Days of Trading: Analysed by Yellow & Pink Route

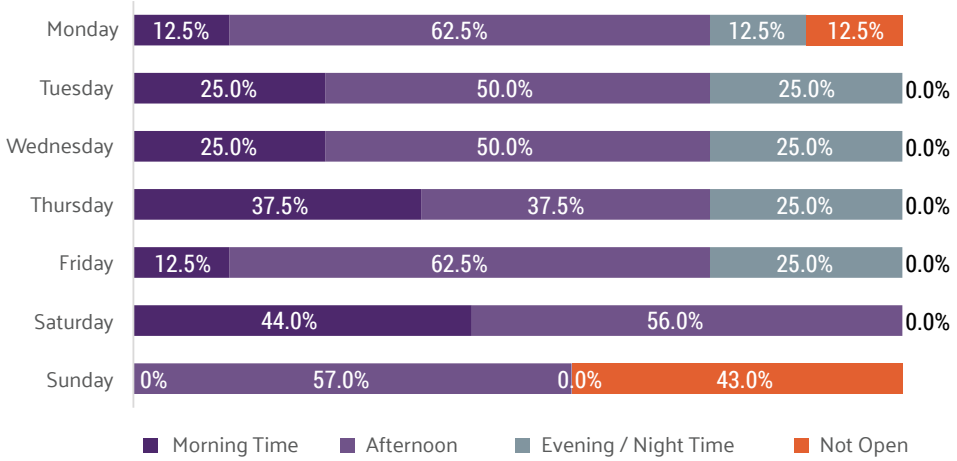


On the yellow route one-third of respondents stated that they traded six per week from Monday to Saturday. A further **33%** stated they are a open on a seven-day week basis. **8%** of businesses on the yellow route are open from Monday to Friday. A further **8%** stated that they only open when the Milk Market is open. 'Other' includes businesses that open five days per week including Saturdays and business that only on a Saturday.

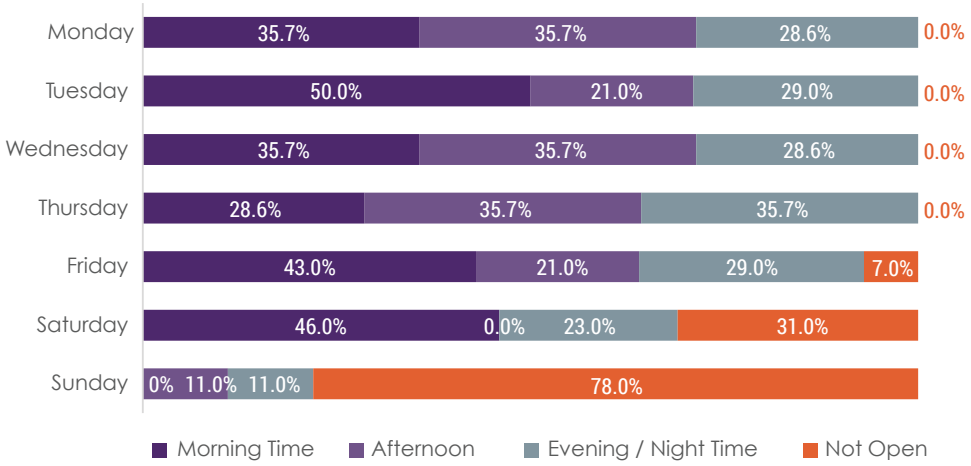
On the pink route **57%** of respondents are open from Monday to Saturday. A further **36%** from Monday to Friday. Seven-day trading accounts for **7%** of respondents on the pink route.

Busiest Trading Periods – Yellow Route

On each day of the week afternoons were reported to be the busiest period. No business reported Saturday evening as being their busiest period however this may be explained by the type of businesses that responded to the survey. **43%** of respondents on the yellow route stated they do not open on a Sunday.



Busiest Trading Periods – Pink Route

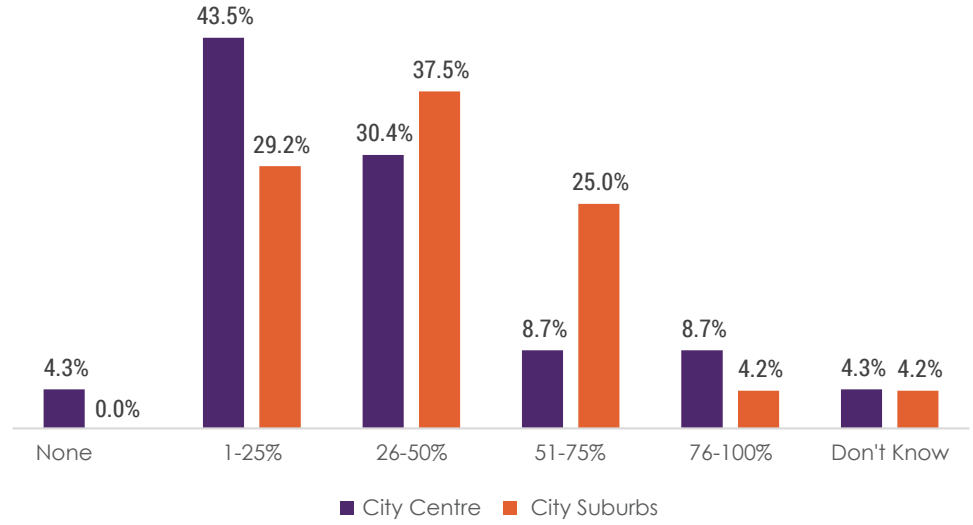


Compared with the yellow route a greater proportion of pink route businesses stated that weekday and Saturday mornings were their busiest periods. On Saturdays nearly half respondents (**46%**) consider the morning to be their busiest period, while none considered Saturday afternoon to be the busiest. Three-in-ten respondents (**31%**) do not open on Saturdays. **78%** of respondents pink route do not open on a Sunday.

Modes of Travel: Business Owners

Three-quarters of business owners stated that they currently drive to their premises. Of these, almost half (**47%**) state that they have access to private parking. Approximately one-third (**32%**) park on streets with **21%** parking in a multi-storey or surface level car park. Businesses that employ further staff estimate that **50%** of staff drive to work.

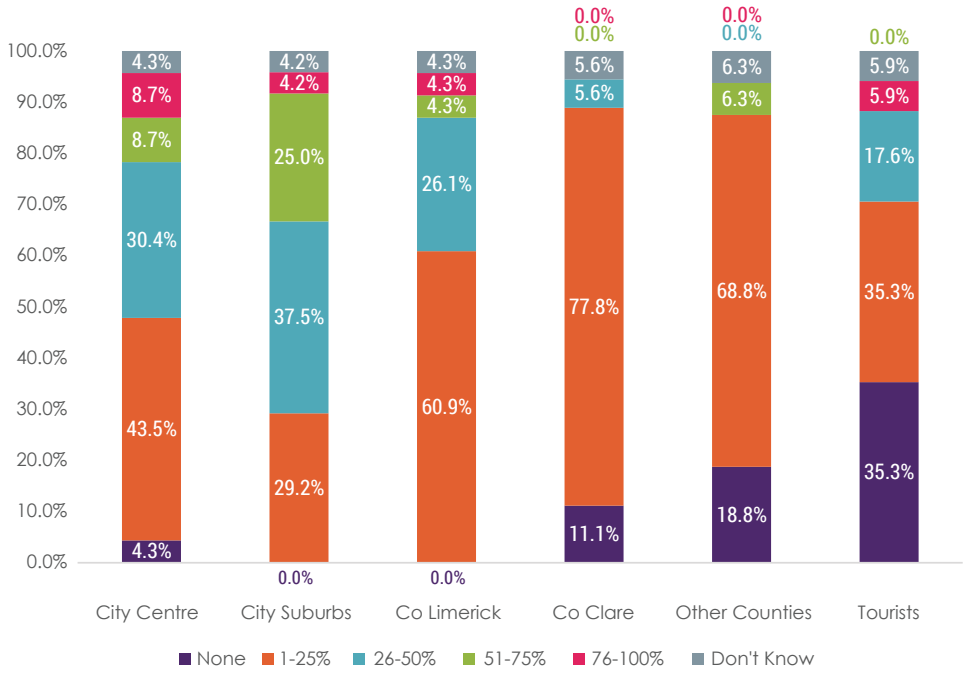
Where Businesses Think Their Customers Are From - Limerick City & Suburbs



Nearly one-in-five businesses (**18%**) estimate that city centre residents comprise more than **50%** of their customers. Three-in-ten (**30%**) of businesses estimate that city centre residents comprise between **26-50%** of their customers. **43.5%** of businesses estimate that city centre residents account up to one-quarter of their business.

Three-in-ten businesses (**29%**) estimate that residents of the city suburbs comprise more than **50%** of their customers. One-in-four businesses (**25%**) estimate that between **51%** and **75%** of their customers are from the city suburbs. A further three-in-ten (**29%**) businesses estimate that residents of the Limerick suburbs comprise up to **25%** of their customers.

Where Businesses Think Their Customers Are From – County Limerick and Wider Area

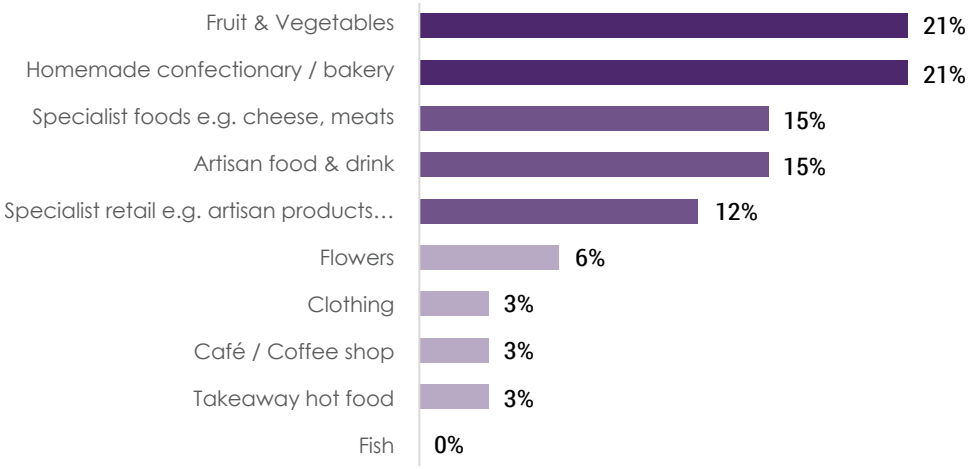


Businesses indicated the greatest proportion of their business comes from customers living in the city centre or suburbs. Residents from outside the city and suburbs represent smaller proportions of the business' customers. Six-in-ten (**61%**) of businesses estimate that customers from County Limerick comprised up to **25%** of their customers. One-in-ten (**11%**) of businesses do not believe they have customers from County Clare while more than three-quarters (**78%**) estimate that residents from County Clare comprise up to **25%** of their customers. No businesses stated that residents of Clare comprise more than **50%** of their customers.

Two-in-ten (**19%**) of businesses do not believe they have customers from any other counties while a further seven-in-ten **(69%)** estimate that residents other area comprise up to **25%** of their customers.

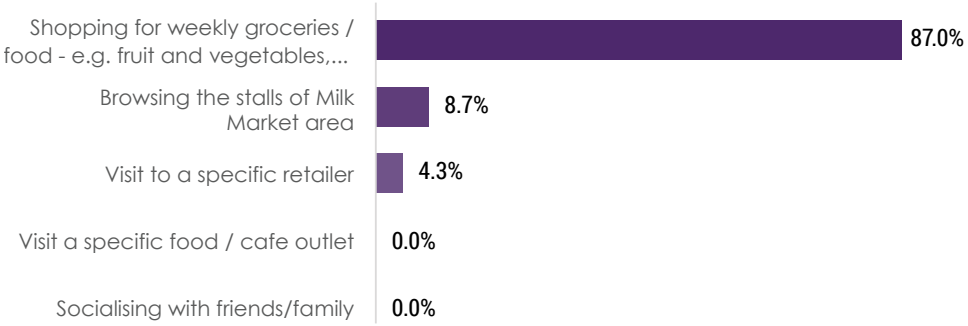
4.3 MARKET TRADER RESEARCH

Nature of Business of Survey Respondents



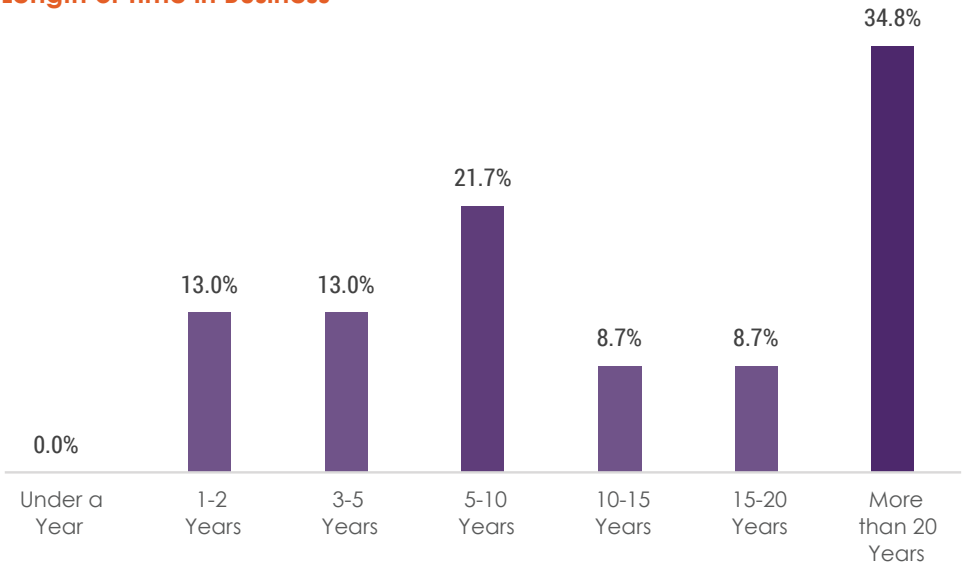
Eight-in-ten (**78%**) of respondents to the Market Trader survey sell food products in their business. Of the remaining **22%**, more than half sell non-food artisan products.

Why Market Traders Believe People Visit the Milk Market



Market Traders overwhelmingly believe that shopping for weekly groceries is the primary reason that visitors visit the Milk Market.

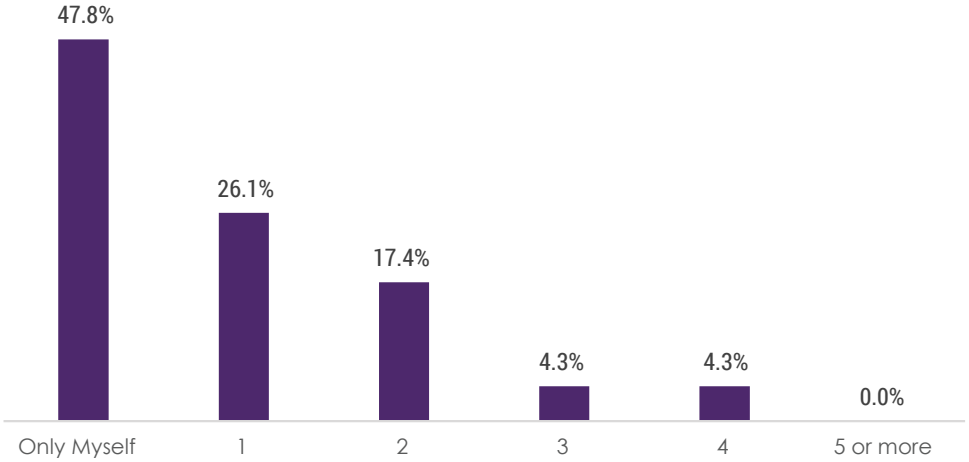
Length of Time in Business



More than one-third of respondents (**35%**) have been in business more than 20 years. **22%** have been in business for between 5 and 10 years. One-in-eight market traders that participated have been in business for 1-2 years or 3-5 years respectively.

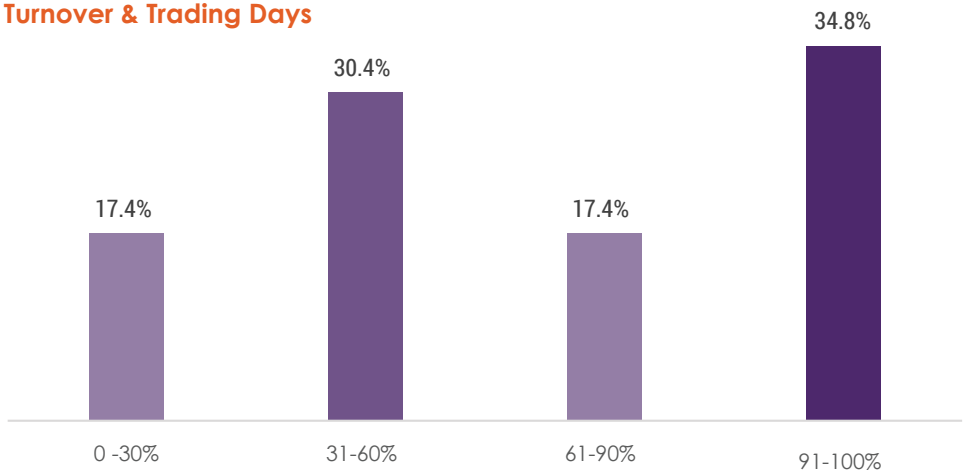
More than three-quarters (**78%**) of respondents stated that they operate only in the Milk Market or adjoining streets. **22%** operate at other locations, trading for up to three days per week.

Number of Staff Employed



Almost half of the Market Traders responding (**48%**) operate without any other staff. One-quarter of stallholders (**26%**) employ one other person. No stallholders employ more than four other people.

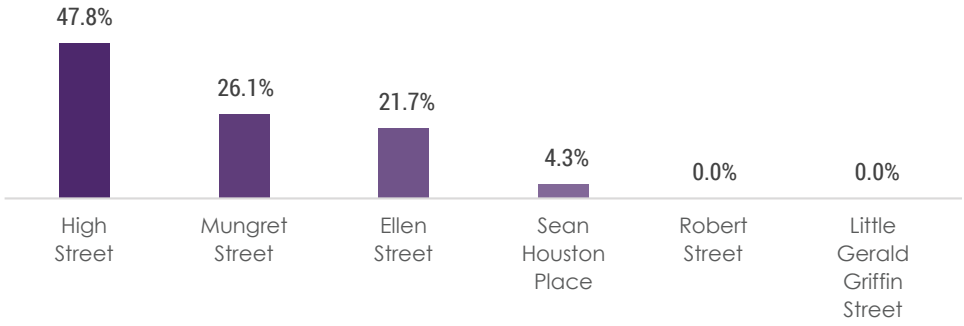
Turnover & Trading Days



More than three-quarters (**78%**) of respondents stated that they operate only in the Milk Market or adjoining streets. **22%** operate at other locations, trading for up to three days per week.

17% of respondents generate up to **30%** of their turnover in the Milk Market or on adjoining streets. Three-in-ten (**30%**) generated between **31%** and **60%** of their turnover at the market. More than one-third (**35%**) estimate that they generate between **91-100%** of their turnover from their stall.

Access & Parking

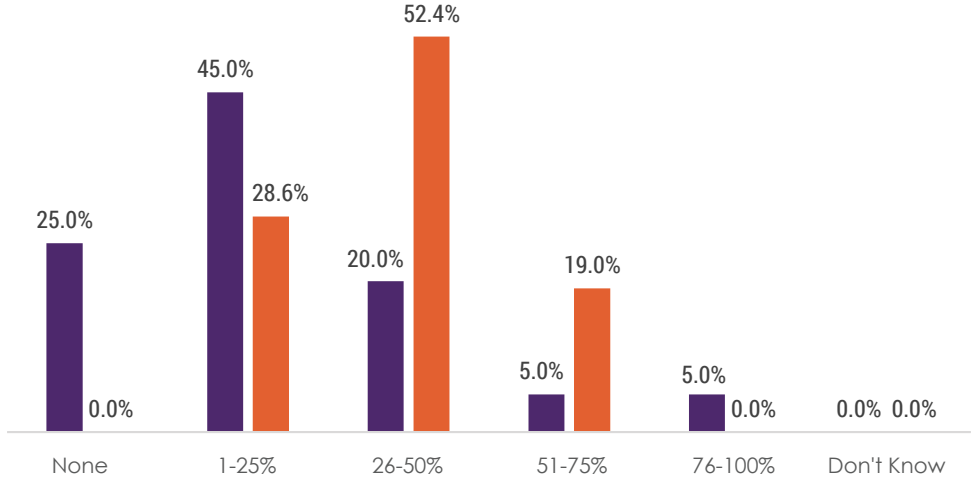


One-quarter of respondents (**26%**) live in Limerick city. A further **39%** of the market traders live in County Limerick. Market traders from County Clare and County Tipperary each account for **9%** of respondents. Market traders from other counties accounted for a total of **17%** of survey replies.

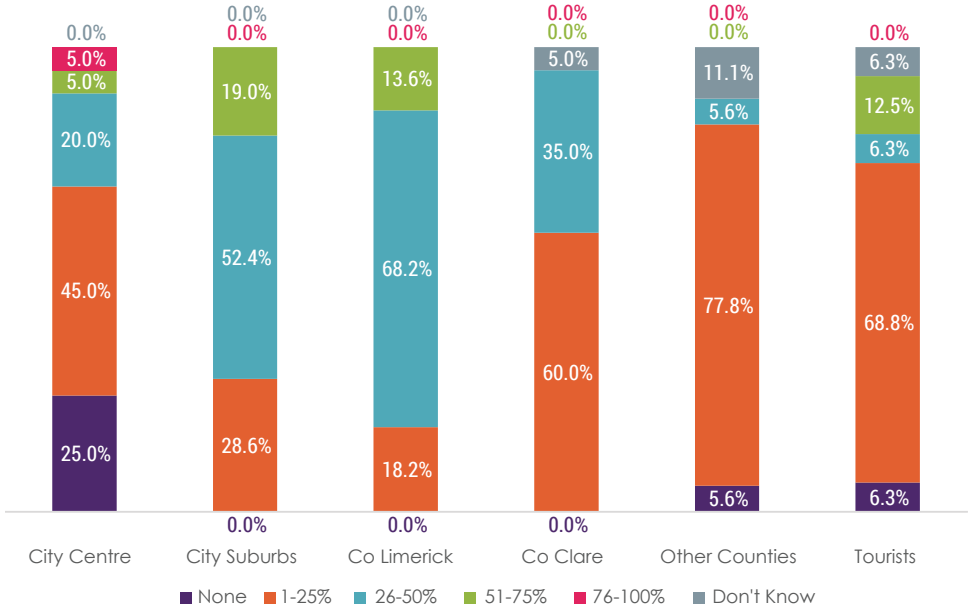
Access to the area via High Street and Mungret Street is the most popular means of market traders arriving to market with **74%** of respondents travelling this route.

More than half of the participating market traders (**53%**) park their vehicles on streets adjoining the Milk Market. **32%** of market traders stated they park in off-street parking at Cornmarket Car Park (**21%**) and the Madden's site off Ellen Street (**11%**). (Note that at the time of the survey the Cornmarket Car Park was closed to the public). A large proportion of external market traders park their vehicles behind their stall.

Where Market Traders Think Their Customers are from: Limerick City & Suburbs

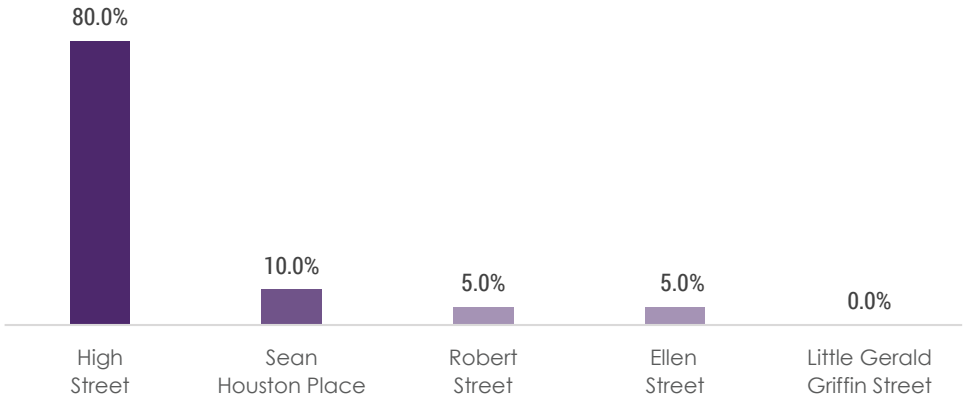


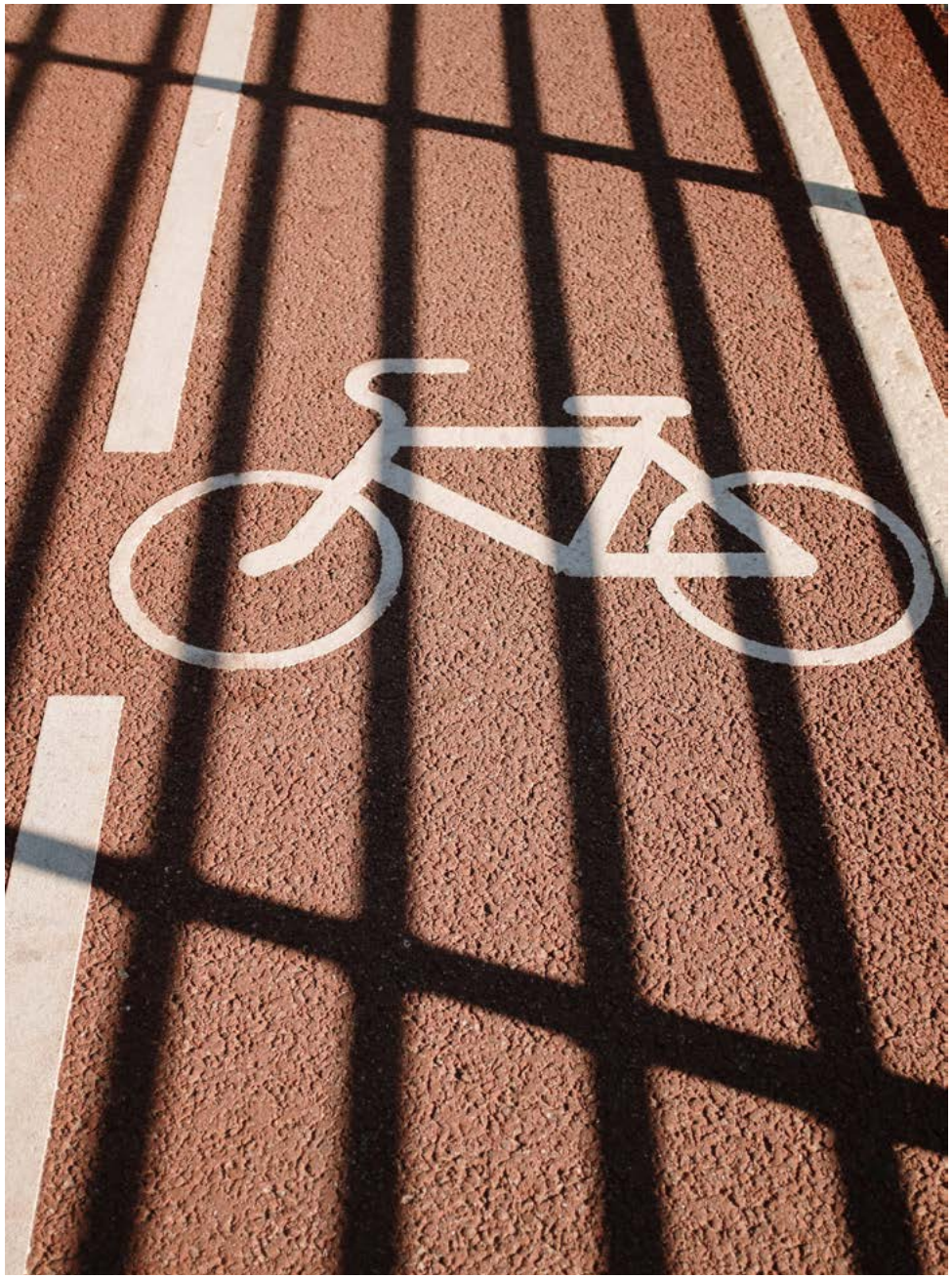
Where Market Traders Think Their Customers are from: County Limerick & Wider Area



Routes Market Traders Believe Customers Use to Access the Milk Market

Market Traders believe that four out of five consumers access the Milk Market area via the High Street. **10%** believe consumers arrive from Sean Houston Place to the west. Only 1 in 20 consider that consumers arrive via Robert Street and Ellen Street respectively.





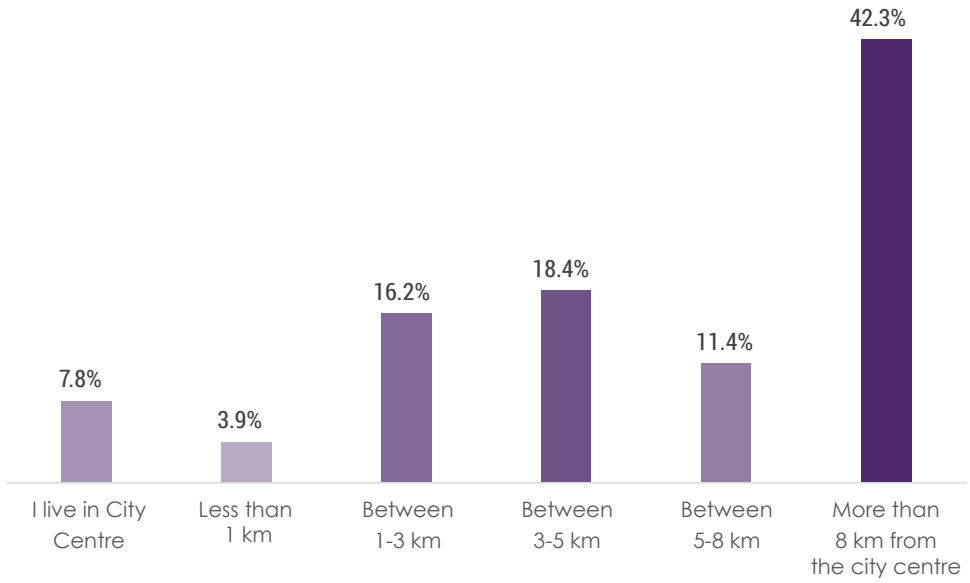
Section 5

Economic Assessment

5.1 UNDERSTANDING COMMUNITY / CONSUMER BEHAVIOUR

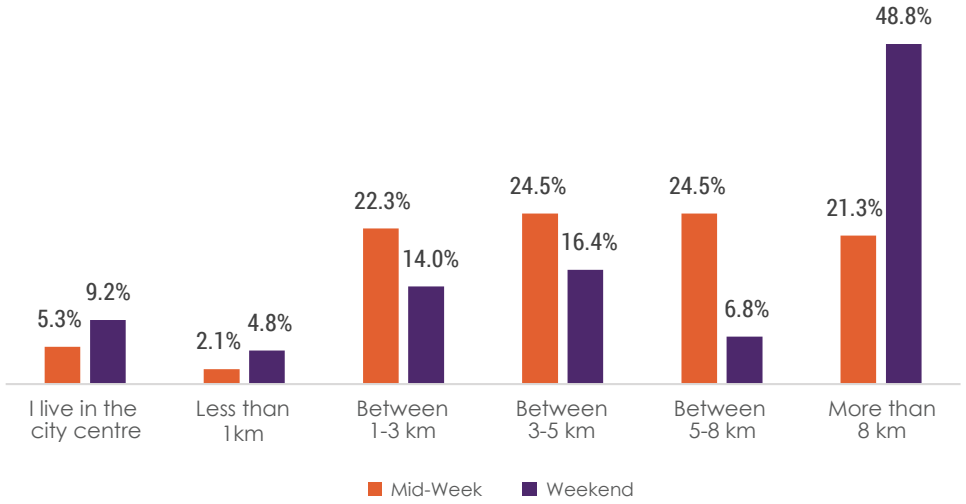
A programme of face-to-face interviews was conducted with visitors on the yellow and pink routes to understand the consumer profile and behaviours of those visiting the area. Surveys were undertaken across a number of days in November 2023 to ensure the ensure representation of the type of visitor (i.e. resident, working in area, attending appointments, etc) to the area across weekdays and weekends. A total of 362 interviews were completed.

Distance Respondents Live from the City Centre



28% of those interviewed live in or within 3km of the city centre. A further **18%** live between 3km and 5km from the city centre. Four-in-ten (**42%**) live more than 8km from the city, suggesting they live outside the metropolitan area. This suggests that more customers live outside the city centre and suburbs than business owners believe.

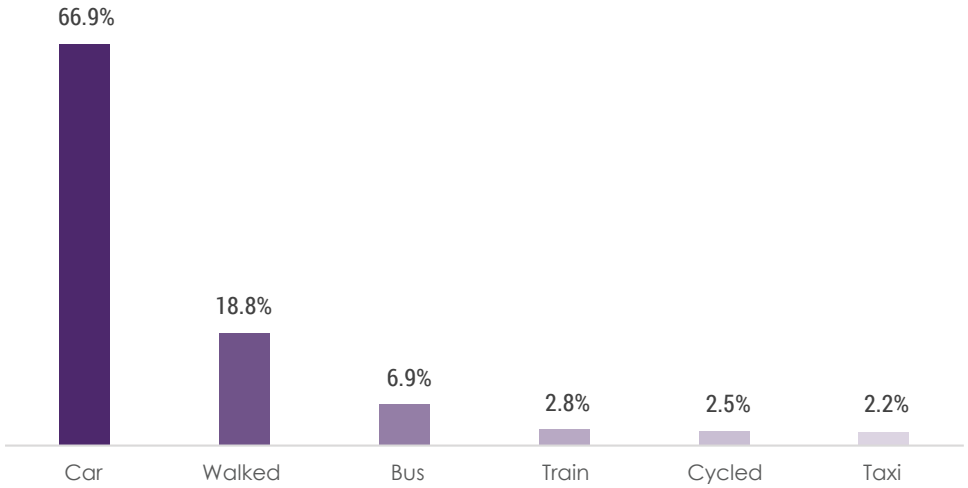
Distance Respondents Live from the City Centre: Analysed by Mid-Week & Weekend



A significantly greater proportion of weekend consumers live outside the city and suburbs area compared with the mid-week consumers. One-in-two visiting the area (**49%**) at weekends live more than 8km from the city centre compared with one-in-five (**21%**) mid-week. More than **70%** of mid-week consumers live between 1km and 8km of the city centre compared with **35%** at weekends.

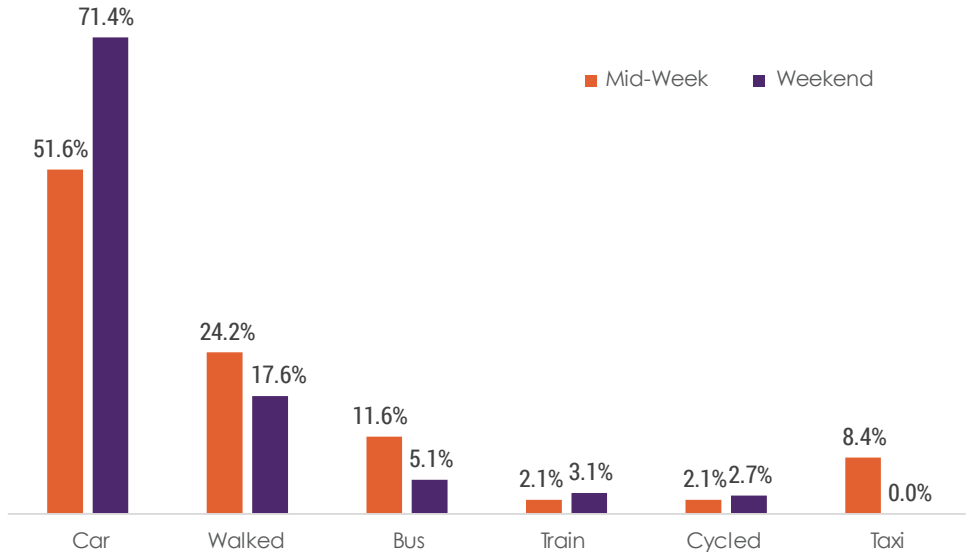
The distance mid-week consumers live from the city centre is broadly evenly spread across the 1-3km, 3-5km, 5-8km and more than 8km. The remaining **7%** live within 1km of the city centre.

Mode of Transport



Two-thirds of consumers drive on their journey to the area. More than one-in-five (**21%**) walk or cycle to the city centre area. **10%** travel on public transport (**7%** bus, **3%** train).

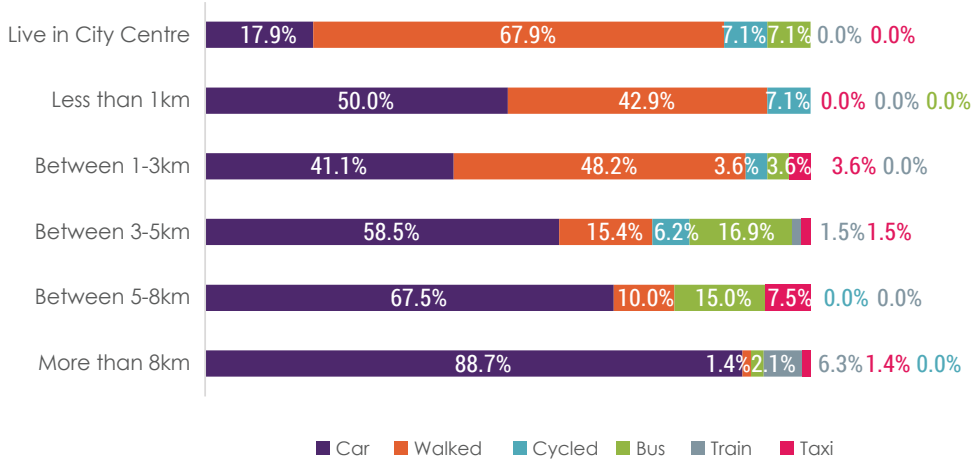
Mode of Transport: Analysed by Mid-Week and Weekend



Driving was the most popular mode of transport for accessing the area. Approximately half (**52%**) of weekday consumers arrived by car, compared with **72%** at the weekend. The increased proportion of car usage by weekend consumers is a further indicator of the greater proportion of weekend consumers living more than 8km from the city centre.

More than one-in-four of weekday consumers arrived using active travel modes with **24%** walking and **2%** cycling. One-in-five weekend consumers arrived using active travel with **18%** walking and **3%** cycling. **12%** of weekday consumers arrived by bus, more than double the proportion arriving by bus at the weekend (**5%**).

Analysis of Mode of Travel vs Distance Lived from City Centre

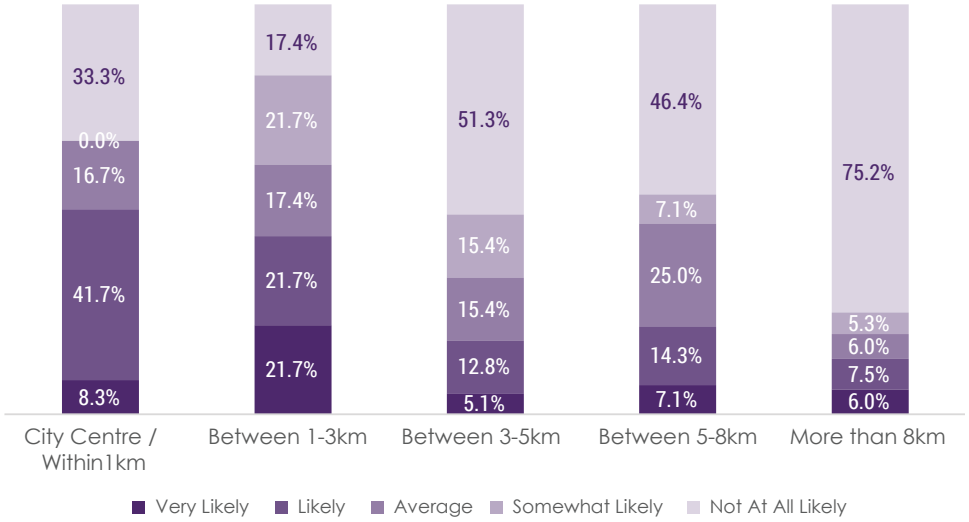


The analysis of the mode of travel used versus the distance lived from the city centre highlights at least **50%** of all those living within 3km of the city centre walked or cycled. Two-thirds (**67%**) of those living in, or within 1km of the city centre stated they had walked or cycled on the day. More than half (**52%**) of those living between 1km and 3km from the city centre had walked (**48%**) or cycled (**4%**) into the city.

59% of those living between 3km and 5km from the city centre drove into the city. One-in-five (**21%**) had walked or cycled into the city with **17%** travelling by bus. Of those living between 5km and 8km from the city centre **68%**

travelled by car and **15%** travelled by bus. One-in-ten (**10%**) stated they had walked to the city centre. Nine out of ten visitors (**88%**) living more than 8km from the city centre travelled by car. **6%** travelled by train and **3%** by bus.

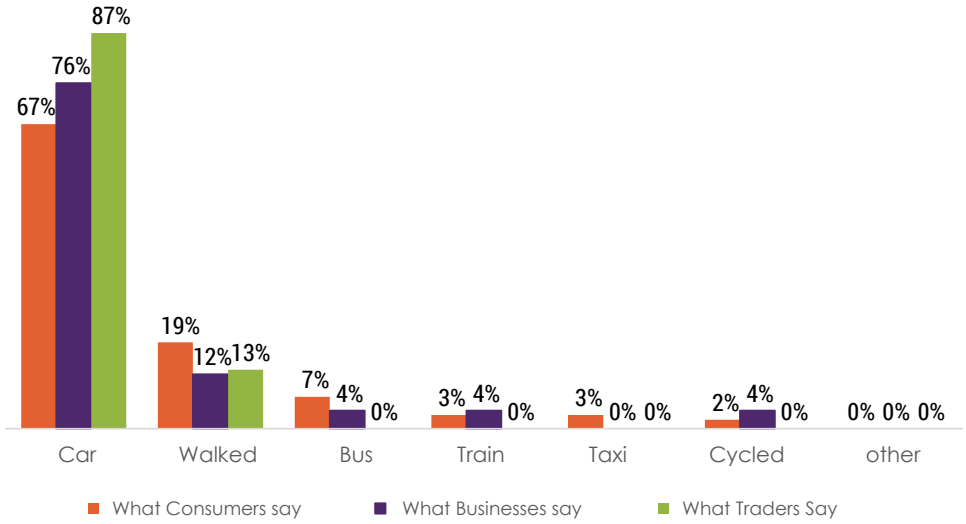
Car Users Likelihood of Walking or Cycling to the Area if New Cycle Lanes or Pedestrian Area Provided



There is evidence that a significant proportion of car drivers within the core city and suburban population are more likely to walk or cycle if Active Travel infrastructure is provided. **50%** of those that live within 1km of the city centre and drove to the city are likely to walk or cycle if new Active Travel measures are added to the area. **44%** of those living between 1km and 3km would be likely to walk or travel to the area. **18%** living between 3km and 5km from the city would be likely to walk or cycle. Of those living between 5km and 8km, **21%** stated they would be likely to use walk or cycle.

Analysis of Consumer Modes of Travel vs Business & Market Traders Opinion

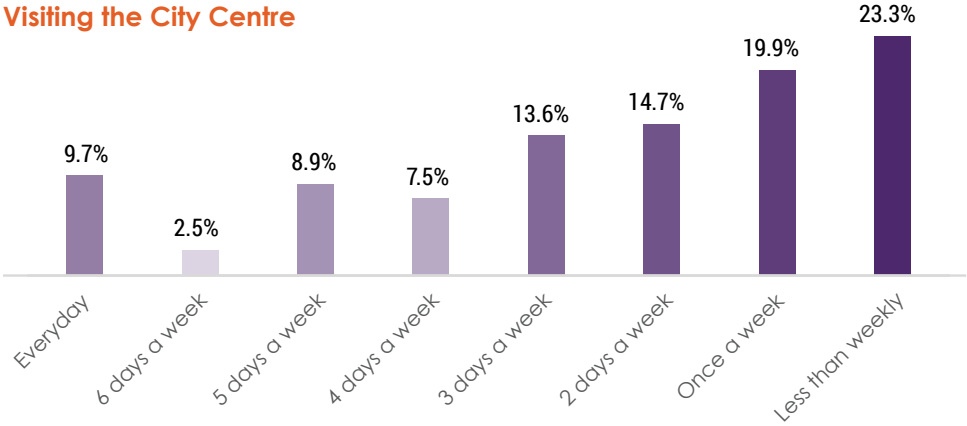
There is a high level of consistency in actual consumer patterns of behaviour and how businesses estimate how their customers access the area. Overall **67%** of community respondents travel by car when visiting this area of the city



centre. Businesses owners estimated that **76%** of their customers travelled by car. Market traders that responded to the survey estimated that **87%** of those visiting the Milk Market had travelled by car.

19% of all consumers walked to the city. Businesses and market traders estimated a lower proportion of their customers had walked to the city at 1**2%** and **13%** respectively. The pattern of businesses and market traders over-estimating the use of cars by their customers is consistent with experience reported elsewhere in Ireland and internationally.

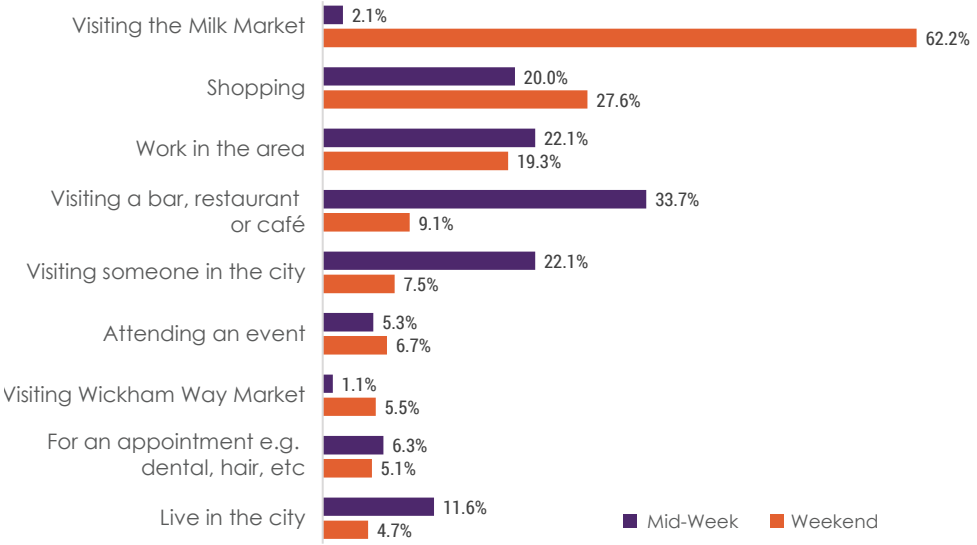
Visiting the City Centre



23% of respondents state that they visit the city centre less than weekly. One-in-five (**20%**) of respondents visit the city centre on a weekly basis.

One-in-ten (**10%**) visit the city centre every day of the week. **9%** of respondents state they visit the city centre on five days per week.

Main Reasons for Visiting the City: Analysed by Midweek & Weekend Responses



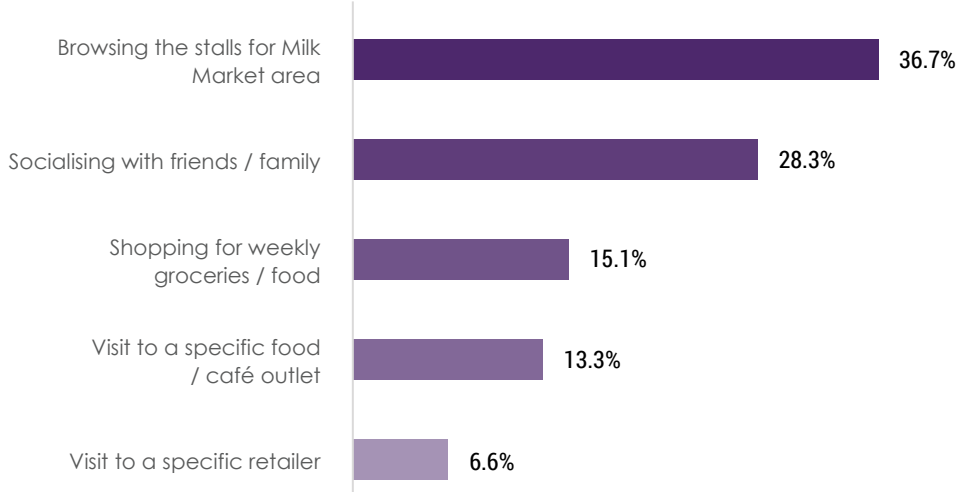
More than **60%** of weekend visitors stated that visiting the Milk Market was one of their main reasons for visiting the area. Shopping was the second most common reason among weekend for visiting, with working in the area stated by **19%** of weekend visitors.

One-third of mid-week visitors stated that going to a bar, restaurant or café was a main reason for coming into the city. **22%** of mid-week visitors were visiting someone during their time in the city. One-in-five (**20%**) mid-week visitors stated that shopping was a main reason for visiting. A similar proportion (**19%**) work in the area.

In comparing mid-week and weekend consumers, there was broad alignment between those working in the area (**22%** mid-week, **19%** weekend), attending an appointment (**6%** vs **5%**) and attending an event (**5%** v **7%**).

5.2 ANALYSIS OF MILK MARKET CONSUMERS

Main Motivation to Visit the Milk Market



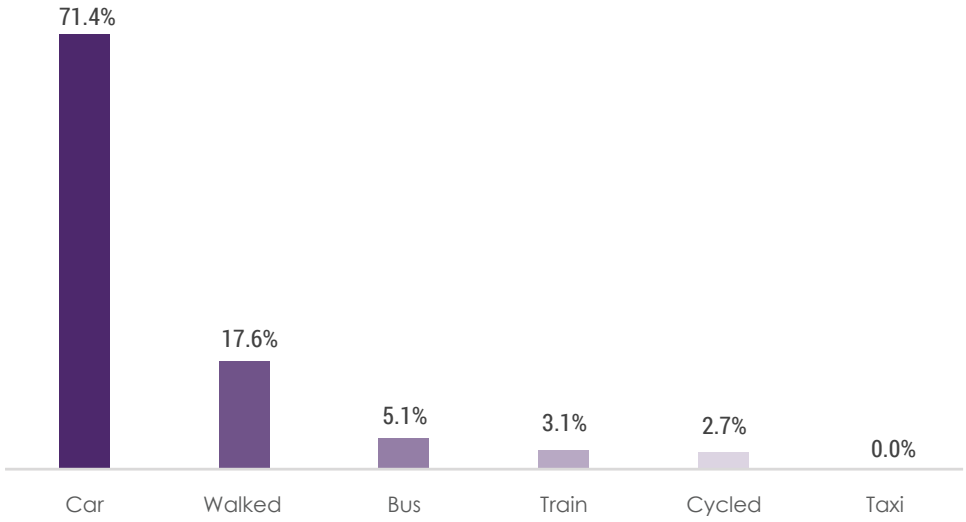
Further analysis of survey responses was undertaken among the public who indicated they visited the Milk Market. More than one-third of visitors (**37%**) said they were visiting the Milk Market to browse the stalls in the area. The socio- cultural importance of the Milk Market is reflected in a further **28%** of respondents who stated they are meeting with friends or family. **15%** of visitors state shopping for weekly groceries or food is their main motivation in visiting the Milk Market.

In contrast, **87%** of participating market traders state visitors are shopping for weekly groceries, with only **9%** believing that visitors are at the Milk Market to browse through the stalls.

Modes of Travel used by Visitors to the Milk Market

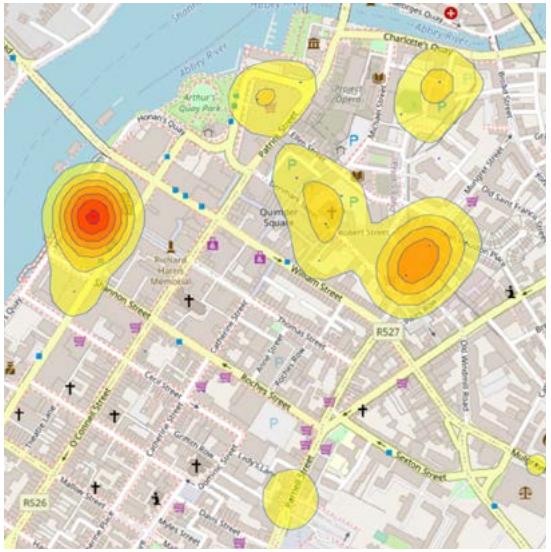
Driving to the city is the most common mode of transport when visiting the Milk Market with **71%** travelling by car. One-in-five (**21%**) walked or cycled to the Milk Market. Of those that travelled by car, **59%** stated they park within a five-minute walk of the area. A further **30%** parked within a five to ten minute walk of the area.

Car Parking Patterns by Visitors to the Milk Market



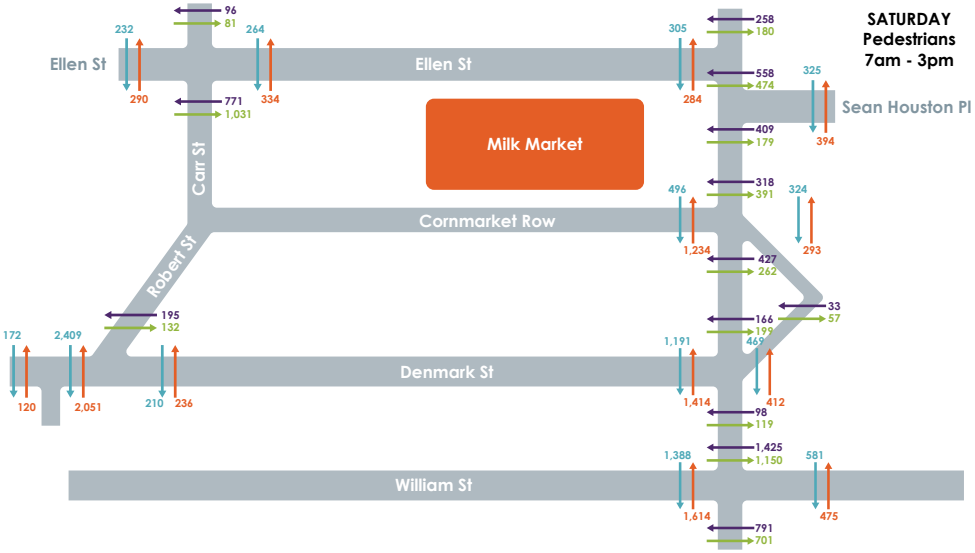
Heat Mapping of Car Parking

In order to understand how consumers access the Milk Market, analysis was undertaken of parking behaviour collected from the research. This is further collated with pedestrian counts to establish main access points and how the route options are impacted by these visitor flows.



Harvey's Quay (**22%**) was the most popular car parking location used by those who travelled by car to the city and visited the Milk Market. Other off-street parking locations, including the car parks at Howley's Quay, Cruises Street, Charlotte's Quay and Arthur's Quay, accounted for a further **21%** of parking. Milk Market consumers parking on High Street, Mungret Street or 'beside the Milk Market' accounted for **19%** of consumers. The highest percentage of car users are parking close to shopping centres. This accounts for consumers who combine their weekly shopping with a visit to other businesses on the yellow and pink routes and the Milk Market.

Pedestrian Access Points



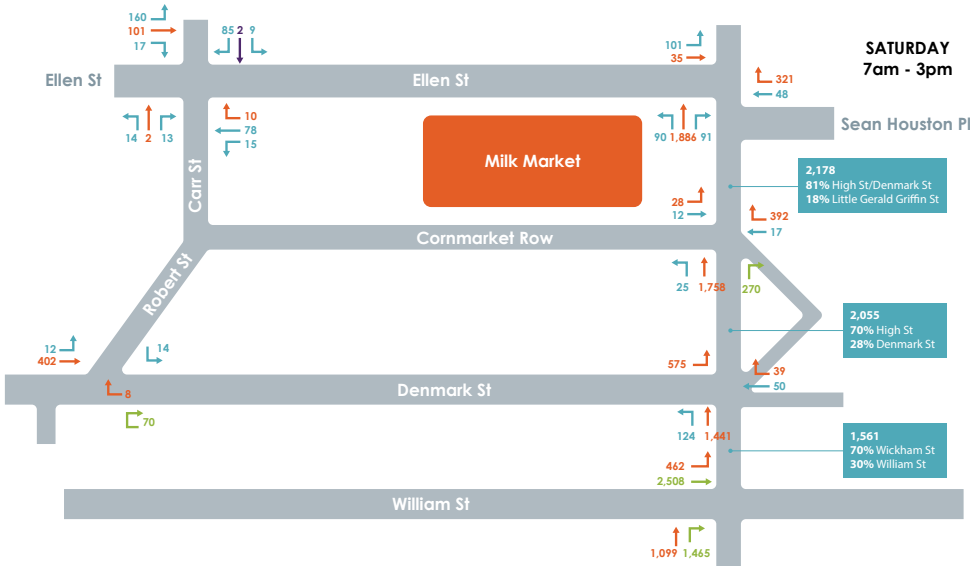
The use of car parking facilities in city centre locations such as Harvey's Quay and Howley's Quay is further supported by pedestrian counts undertaken by LCCC on streets adjacent to the Milk Market on a Saturday during market opening hours.

The counts found the most popular means of pedestrian access to the area was from Robert Street via the Denmark Street/Cruises Street direction. Robert Street is pedestrianised during market trading hours on a Saturday with stalls in place along the street. The pedestrian count suggests at least 4,500 pedestrian movements to and from the Milk Market via Robert Street. This footfall analysis is directly aligned with car parking behaviour and how the majority of footfall by visitors to the Milk Market is influenced by parking facilities in the area.

The second most popular pedestrian access point was from the William Street direction into the High Street. Approximately 1,800 pedestrians walked down High Street from the Wickham Street junction with more than 1,650 in the opposite direction during market hours to access the Milk Market area. Pedestrians accessing the market area via the High Street will include the resident population of adjoining areas that converge on the William Street/ Wickham Street/High Street junction extending outwards off Mulgrave Street and beyond Colbert Station.

The predominant use of Robert Street to access the Milk Market area is at complete variance to the believe of market traders that participated in the survey. Only **5%** of market traders believe consumers arrive from this direction.

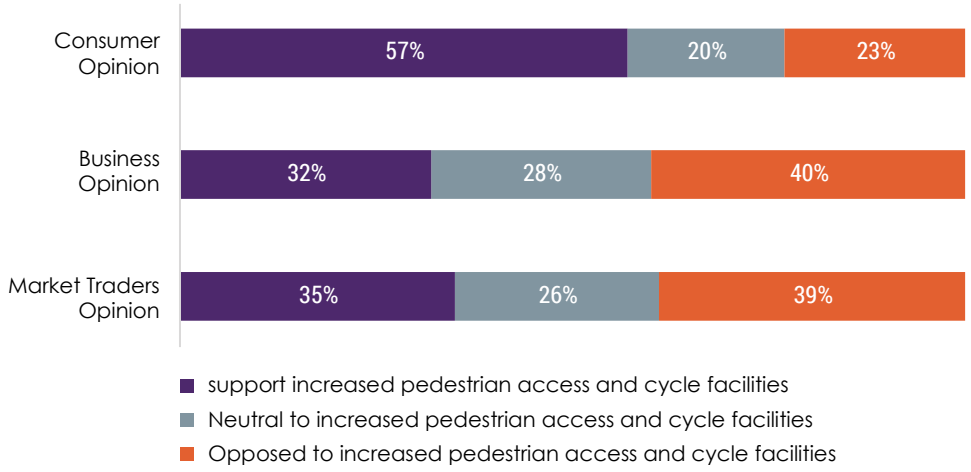
Traffic Count During Milk Market Operating Hours



A traffic count undertaken by LCCC during the Saturday market period recorded more than 1,550 vehicles passing down High Street from the Wickham Street / William Street junction. During this same period there were approximately 3,500 pedestrian movements up and down High Street.

5.3 ATTITUDE TO POSSIBLE ECONOMIC IMPACT

Comparison of Attitudes to Increased Pedestrian Access and Cycle Lane Facilities in the Area

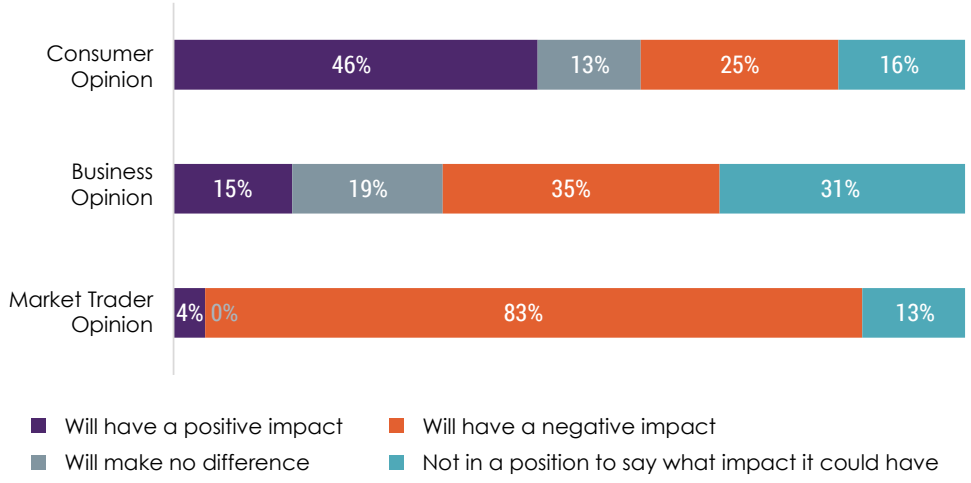


Consumers recorded a greater level of support for increased pedestrian access and cycle lane facilities in the area of the proposed scheme than local businesses or market traders operating in or adjacent to the Milk Market.

More than half (**57%**) of all consumers support increased pedestrian and cycle facilities with less than a quarter (**23%**) opposed to their introduction. **20%** of consumers are neither in support or opposed to an increase in pedestrian and cycle facilities in the area.

One-in-three (**32%**) businesses support the introduction of increased pedestrian access and cycle lane facilities. One-in-four (**40%**) of businesses are opposed to an increase. **28%** of businesses are neutral to an increase in facilities. More than one-third (**35%**) of market traders operating at the Milk Market or surrounding streets support increased pedestrian access and cycle facilities in the area. **39%** are against such measures.

Attitudes to the Potential Economic Impact of Increase in Cycling Facilities and Pedestrian Access



Nearly half (**46%**) of all consumers visiting the area consider that an increase in pedestrian access and cycling facilities will make a positive economic impact to the area. A further **13%** believe there will be no economic impact as a result of the project. One-in-four (**25%**) consumers consider there will measure will have a negative impact on the local economy. **16%** were not in a position to say what economic impact may occur.

34% of responding businesses believe the long term impact of the proposals will result in a positive economic impact (**15%**) or make no difference (19%). **35%** of businesses consider the introduction of increased pedestrian access and cycle facilities will have a negative economic impact.

83% of participating Market Traders consider that in the long term access for cyclists and pedestrians only on High Street will have a negative impact on their business.

CASE STUDY

Bloor Annex and Korea Town, Toronto, Canada

In 2016 the City of Toronto installed a 2.6km cycle lane along Bloor Street, a busy down-town commercial street. This involved the removal of one lane of traffic as well as a large number of parking spots. Concerns were raised by merchants that this would have a negative impact on their businesses and as a result a full assessment of the pilot[1] was commissioned before a decision was made as to whether to go ahead permanently.

This study found that the scheme resulted in traffic volumes falling by 5.95%. This did not however result in a fall in sales, with a **4.45%** overall increase in spending compared to **3.73%** in comparator areas. In addition, **62%** of businesses reported serving over 100 customers a day, up from **46%** before the pilot scheme was introduced.

Some negatives were identified. In particular, an increase in difficulty in finding car parking spaces for those still arriving by car, and increased difficulty in loading and unloading trade vehicles, were reported.

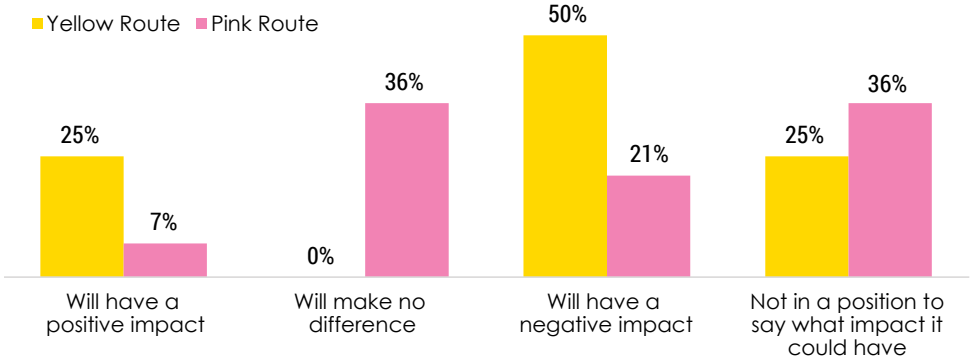
[1] Clean Air Partnership: Economic Impact Study of Bike Lanes in Toronto's Bloor Annex and Korea Town Neighbourhoods, 2017, Economic Impact Study of Bike Lanes in Toronto's Bloor Annex and Korea Town Neighbourhoods, Summary Report (tcat.ca)

Bloor Street: Pre – cycle lane

Bloor Street – Post scheme

BUSINESS ATTITUDE

Long Term Impact of a Cycle Lane Close to Their Business - Analysed by Yellow & Pink Route



A quarter (**25%**) of responding businesses on the yellow route believe the proposals would have a positive economic impact. This compares with **7%** of respondents on the pink route. A further **36%** of respondents on the pink route consider the project will have neither a positive or negative economic impact.

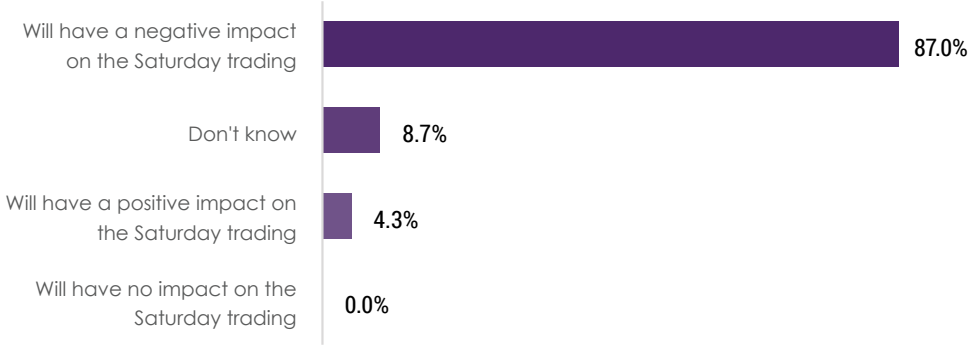
50% of responding businesses on the yellow route and **21%** of responding businesses on the pink route consider the proposals will have a negative economic impact.

A quarter (**25%**) of businesses on the yellow route and **36%** of businesses on the pink route were not in a position to say what economic impact the scheme may have.

MARKET TRADER ATTITUDE

Economic Impact of the Yellow Route on Business in the Milk Market Area

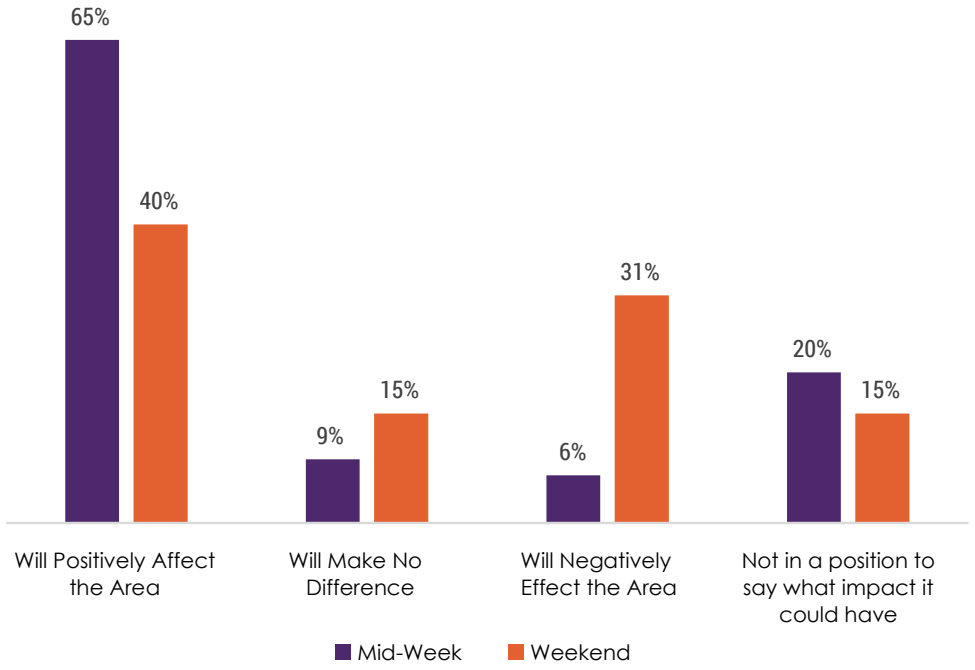
87% of respondents state that implementation of the Yellow Route including removal of traffic from the High Street will have a negative impact on Saturday trading. **4%** believe the Yellow Route will result in a positive impact on trading.



CONSUMER & COMMUNITY ATTITUDES

Overall, **46%** of consumers considered that the increase in cycling facilities and pedestrian access would have a positive economic impact. **25%** of all respondents believe proposals will have a negative economic impact.

Attitudes to the Potential Economic Impact of an Increase in Cycling Facilities and Pedestrian Access – Analysed by Mid-Week vs Weekend



CASE STUDY

Bridge Street, Cambridge, UK

In January 1997, Cambridgeshire County Council introduced an 18-month experimental city-centre road space reallocation scheme, as the first stage of the Cambridge core traffic scheme. The closure of Bridge Street to through traffic involved the removal of approximately 9 000 vehicles per day. This scheme was studied as part of a Pan European study into the impact of pedestrianisation on traffic volumes[1].

Concerns around the impact on the retail trade do not appear to have materialised. There was no evidence of any negative impacts on retail trading patterns and opposition from traders was reported to have "… *reduced significantly as the positive aspects of the scheme became more evident*". In particular, the impact on the tourist trade was noted, with many retail units transforming into restaurants and cafes.

Concerns were also raised that this scheme would lead to congestion on neighbouring streets, However, only 2,000 extra vehicles per day were recorded on the main adjacent routes (East Road and Maids Causeway), despite the removal of 9,000 vehicles per day on the main route and around 5,000 per day on the adjacent Parkside Road.

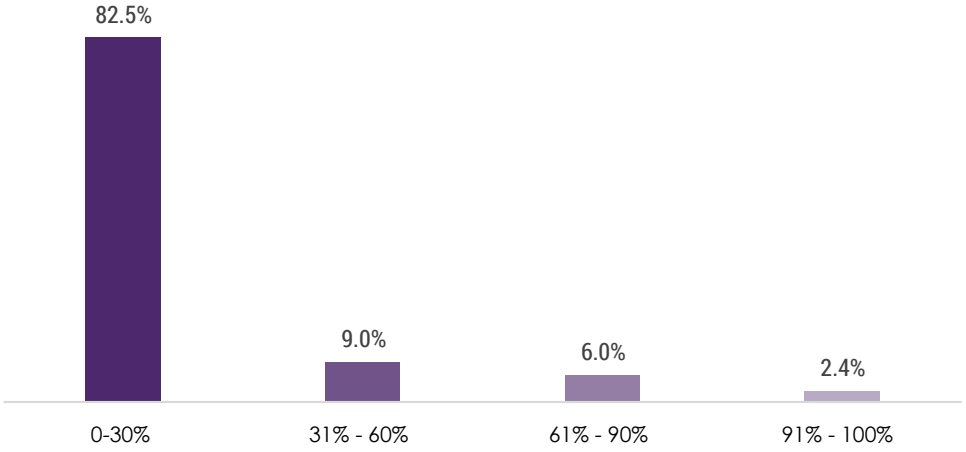
[1] EU: Reclaiming City Streets for people: Chaos or quality of life, 2013, Reclaiming city streets for people - Publications Office of the EU (europa.eu)

Bridge street: Before scheme

Bridge street: After scheme opened

In comparing the attitudes of mid-week and weekend visitors to the area, two-thirds (**65%**) of mid-week visitors to the area consider the proposals will positively affect the area compared with **40%** of weekend visitors. Only **6%** of mid-week visitors believe increase pedestrian and cycling routes will have a negative economic impact compared with **31%** of the weekend respondents.

Proportion of Weekly Groceries Purchased at the Milk Market

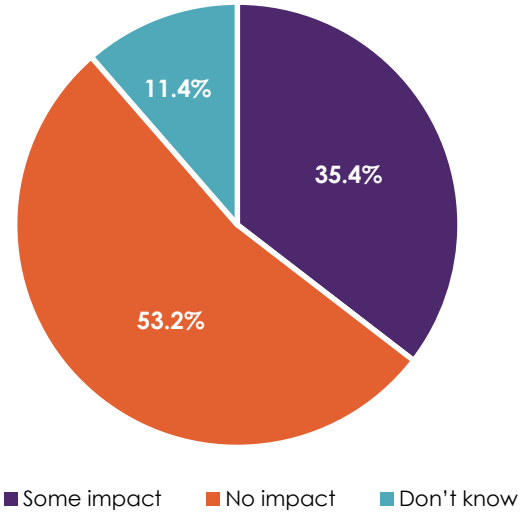


Four-in-five (**82.5%**) consumers to the Milk Market purchase no more than 30% of their weekly groceries at the Milk Market. Four-in-ten (**39%**) stated that they did not purchase any of their weekly groceries at the Milk Market reflecting the previously outlined reasons to visit e.g. browsing and social elements. Over a third state they would purchase up to **20%** of the weekly shopping at the Milk Market. **24%** of visitors buy **10%** of their weekly groceries. One-in-ten consumers (**10%**) purchase between **11-20%** of their weekly groceries when they visit the Milk Market.

8% of Milk Market consumers purchase more than **60%** of their weekly groceries at the Milk Market. Over a quarter (**28%**) of this consumer cohort walked to the Milk Market. Half (**50%**) stated they travel by car and parked on the streets immediately adjacent to the Milk Market. The remaining **22%** of visitors also travelled by car and parked at other locations in the city centre.

Overall, only **4%** of Milk Market visitors purchase more than **60%** of their weekly groceries and park cars on streets adjacent to the Milk Market.

Impact on Milk Market Visitor Behaviour with the addition of a Cycle Lane Passing the Milk Market



Consumer and community visitors to the Milk Market were specifically asked if the addition of Active Travel infrastructure would impact of their likelihood of shopping in the Milk Market. More than half (**53%**) of the visitors to the Milk Market stated the addition of a cycle lane would have no impact on their shopping habits. **35%** of consumers felt their shopping habits may be impacted in some way with **11%** indicating they did not know.

Section 6

Conclusions

CONCLUSIONS

The economic assessment research undertaken among all stakeholder groups is consistent with the experience of other national and international urban areas. The research analysis clearly demonstrates the gap between perceived negative impacts and the reality when the projects become operational. There are similar gaps across both the Yellow and Pink routes on the perceived impact when comparing business and consumer attitudes. Numerous international studies have revealed comparable cycling / walking investment had no negative impacts on the core economic areas examined with some experiencing an economic uplift.

The business survey conducted as part of this analysis highlighted an under appreciation of the volume of customers who walk or cycle to local businesses. The CSO data highlights increased levels of walking and cycling in Limerick city and suburbs. It reflects further alignment with wider international and societal trends towards increased commuter use of more sustainable transport options. The national and international evidence outlined how concerns expressed by local businesses in the study area around the impact on businesses of reducing car access is commonplace.

The evidence of the international analysis reveals the long-term impact of such schemes has been to increase footfall and sales for businesses along the route. Businesses are often less dependent on cars than they may expect. The changes to car access do not appear to dissuade customers from travelling to shopping areas. Furthermore, improved public realm tends to encourage consumers to stay longer and increase expenditure, particularly in food and hospitality businesses. The general experience internationally is most businesses report overall satisfaction following the changes that were made. Where there have been negative impacts, these have tended to be associated with short term affects due to construction work or impacting businesses particularly reliant on access by car i.e. heavy goods.

The primary research conducted locally along both routes highlights the contrasting views between businesses and their customers. Among businesses, there is widespread support at the broader concept level i.e. the opportunity to strengthen the linkages between the city and the UL campus. At the economic level, there are concerns among businesses around the potential adverse economic impact they may experience. There are some differences in the strength of sentiment among business with varying views across the two route options. Businesses on the Pink route suggest the Active Travel plans will largely make no difference to them. A greater percentage of businesses on the Yellow route are more in favour of the Active Travel plans and the opportunities it could realise. Equally, there is a higher proportion of businesses on the Yellow route who suggest the initiative will have a negative economic impact on their business.

The majority of visitors to the Saturday Milk Market stated the introduction of cycle lanes will not impact on their shopping habits and motivation to visit the Milk Market. Equally, **46%** of consumers believe the investment in cycling and walking amenities through Active Travel will have a positive economic impact. There is a consumer cohort of approximately **25%** who suggest their personal economic activity in the area could be altered by the Active Travel proposals. A similar percentage would not be supportive of the Active Travel proposal to add cycling or walking restructure in the area. Mid-week consumers have a more favourable opinion of the potential economic impact of Active Travel than weekend consumers.

The consumer research combined with the footfall counters provides clear evidence of how shoppers are accessing the area and the influence of car park locations. Notwithstanding the Cornmarket Car Park was not operational at the time of the analysis, the majority of consumers access the area from the city centre and city areas where car parks are located. The heat mapping of where consumers park and footfall counter information highlight consumers are accessing the area from the main commercial areas i.e. Cruises / Robert St, Denmark St. This is predominantly outside of the Yellow and Pink routes with no incursion on the proposed options. It also highlights how consumers are combining their main shopping activity with incursions into the wider area under assessment. The feedback from the Milk Market customer analysis suggests a visitor behaviour pattern that combines shopping in larger commercial / supermarket outlets in the city centre with a visit to the market to make up their weekly shopping basket. A relatively small percentage of those surveyed are doing close to their full weekly shopping in the Milk Market and only half of these access the area by foot.

Economic impact is largely influenced by the demand side i.e. consumers. The evidence of the research suggests no adverse impact on consumer behaviour in visiting businesses on the Yellow or Pink Routes. The available data from footfall counts and analysis of parking behaviour suggests accessibility into

the area will not be restricted or altered. The Yellow and Pink route options do not result in any significant levels of reduction of car parking spaces or a reduction in how consumers can access businesses on the routes. In the immediate term, the re-opening of Cornmarket Car Park will create additional capacity in the area with the potential to shift the predominance of car parking space use in the centre of the city linked to retail multiples.

Based on current consumer behaviours, the evidence of the research suggests there will be no adverse economic impact. It must be noted business sentiment is largely negative, however, the attitude of consumers and the evidence of the international research suggest no negative impact or alterations to consumers' willingness to engage with local businesses on the routes. There are considerable operational concerns that have a direct influence on business attitudes to the proposed Active Travel investment. Access routes to the Milk Market area on the yellow route was highlighted by market traders while stores dealing with larger household goods require large vehicle access and parking access. The majority of respondent market traders also currently park their vehicles on streets adjoining the Milk Market. Dealing with the supply side / business challenges needs to be accounted for in future Active Travel planning to ensure the operational environmental is unaffected and providing consumers with the rationale to visit these parts of the city and support local enterprise.

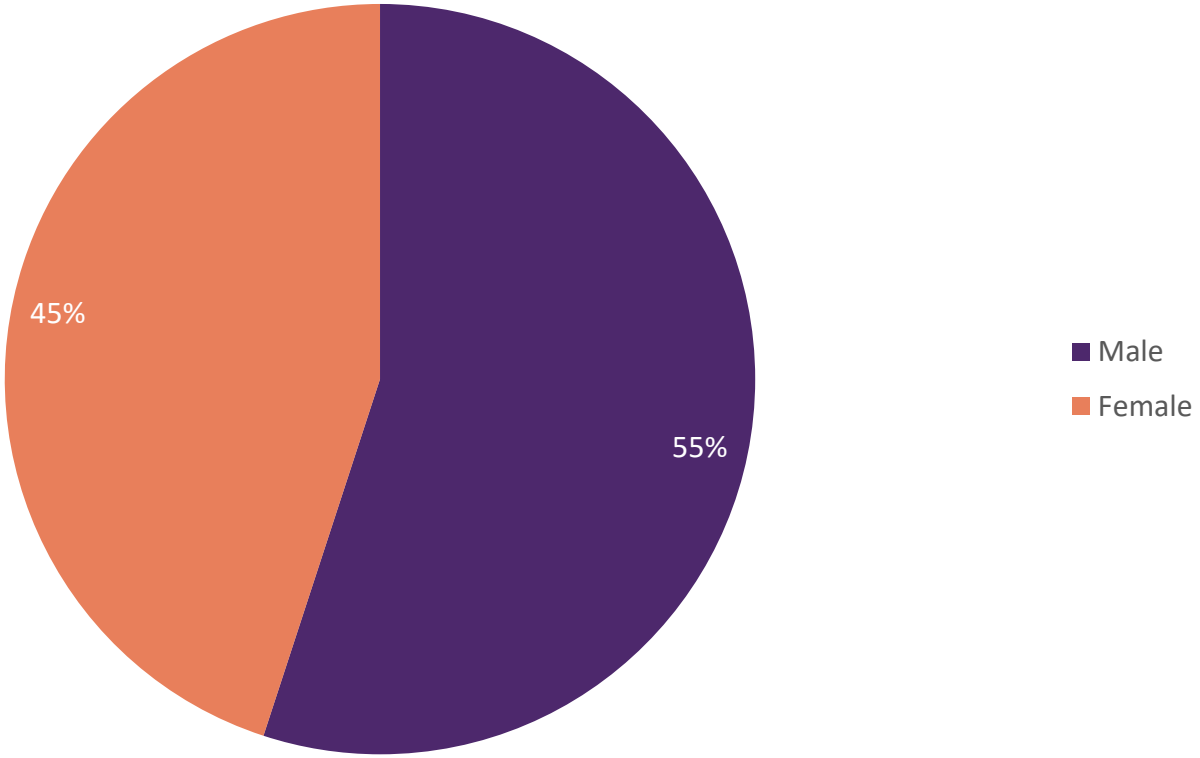
APPENDIX 1

Survey Results

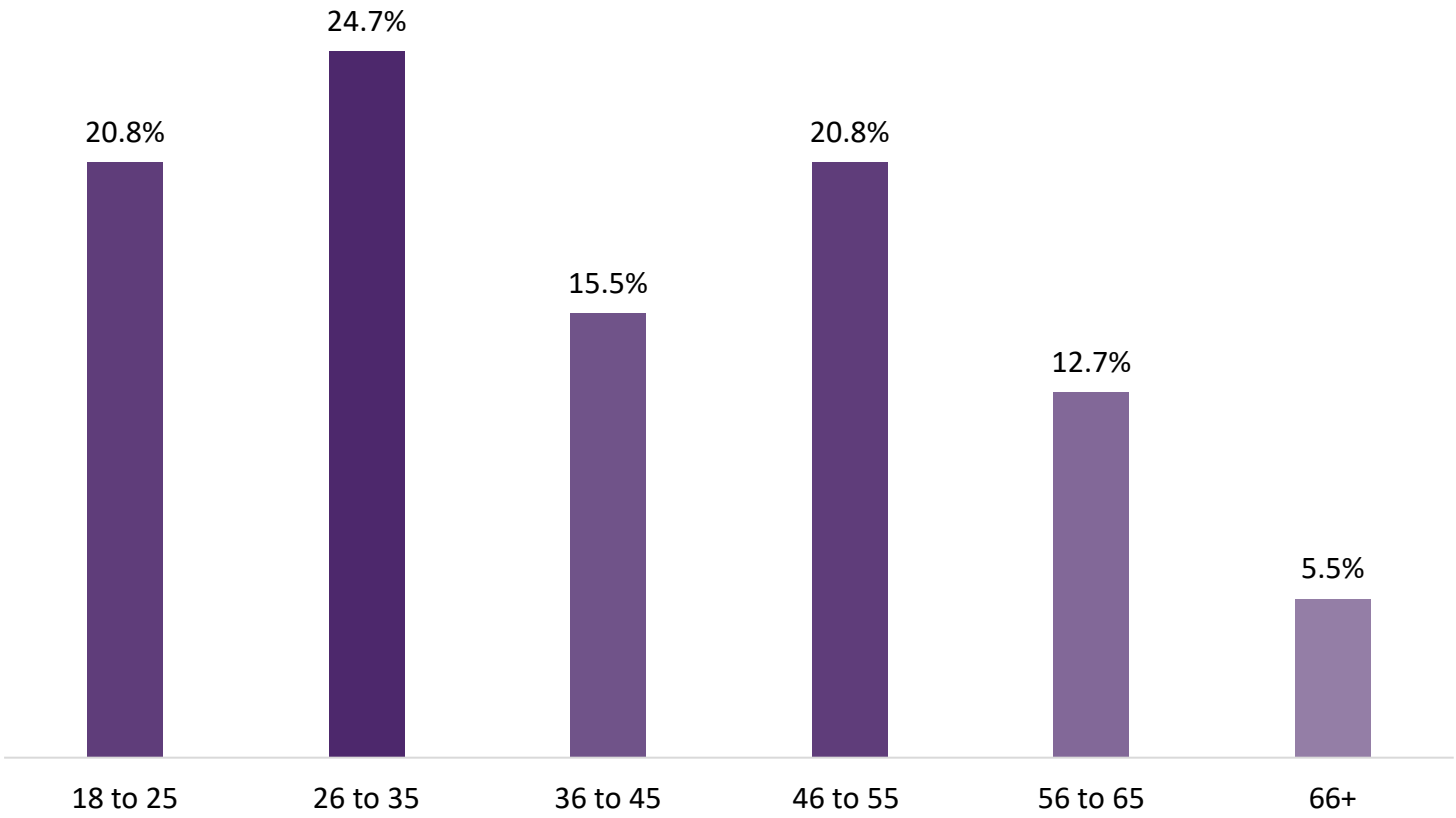
REPUCON
CONSULTING

Consumer Survey

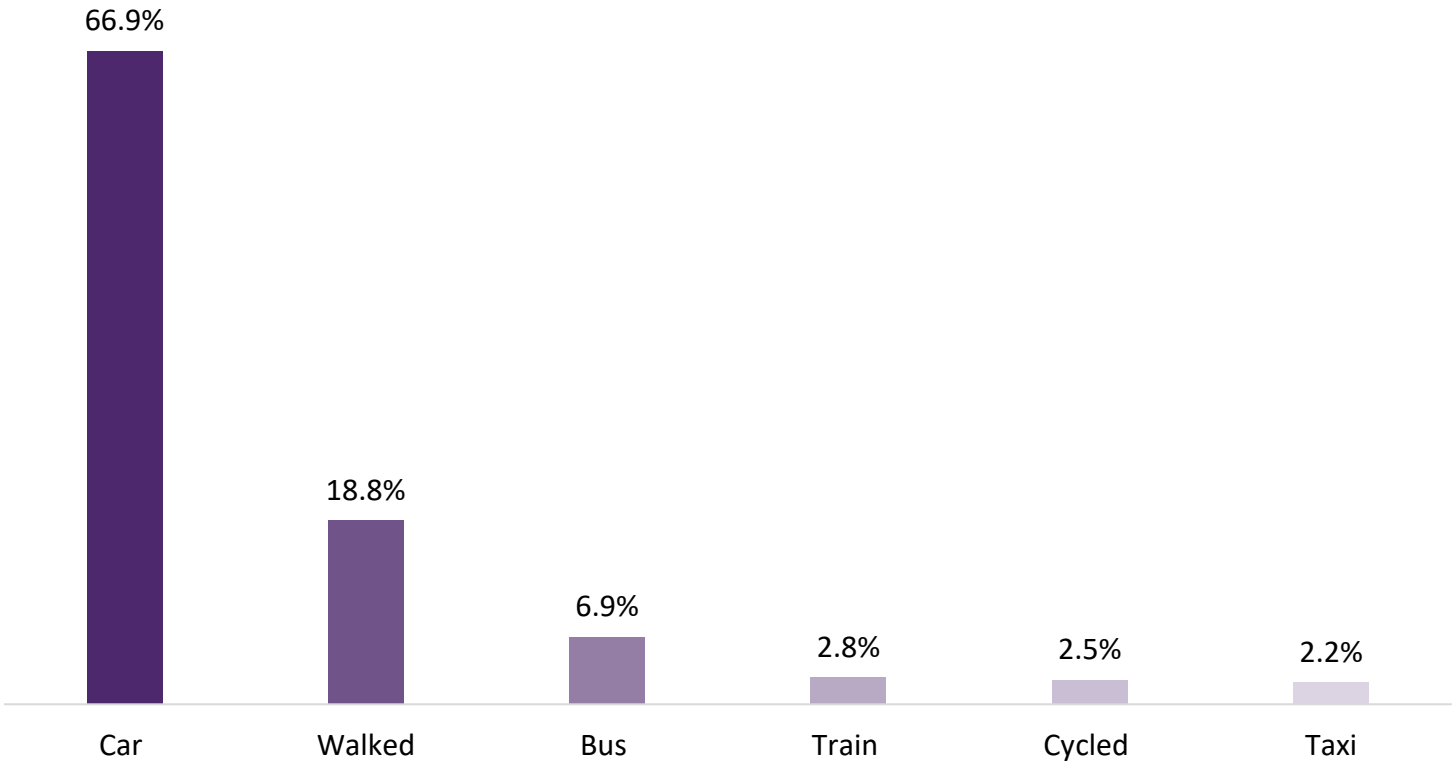
GENDER



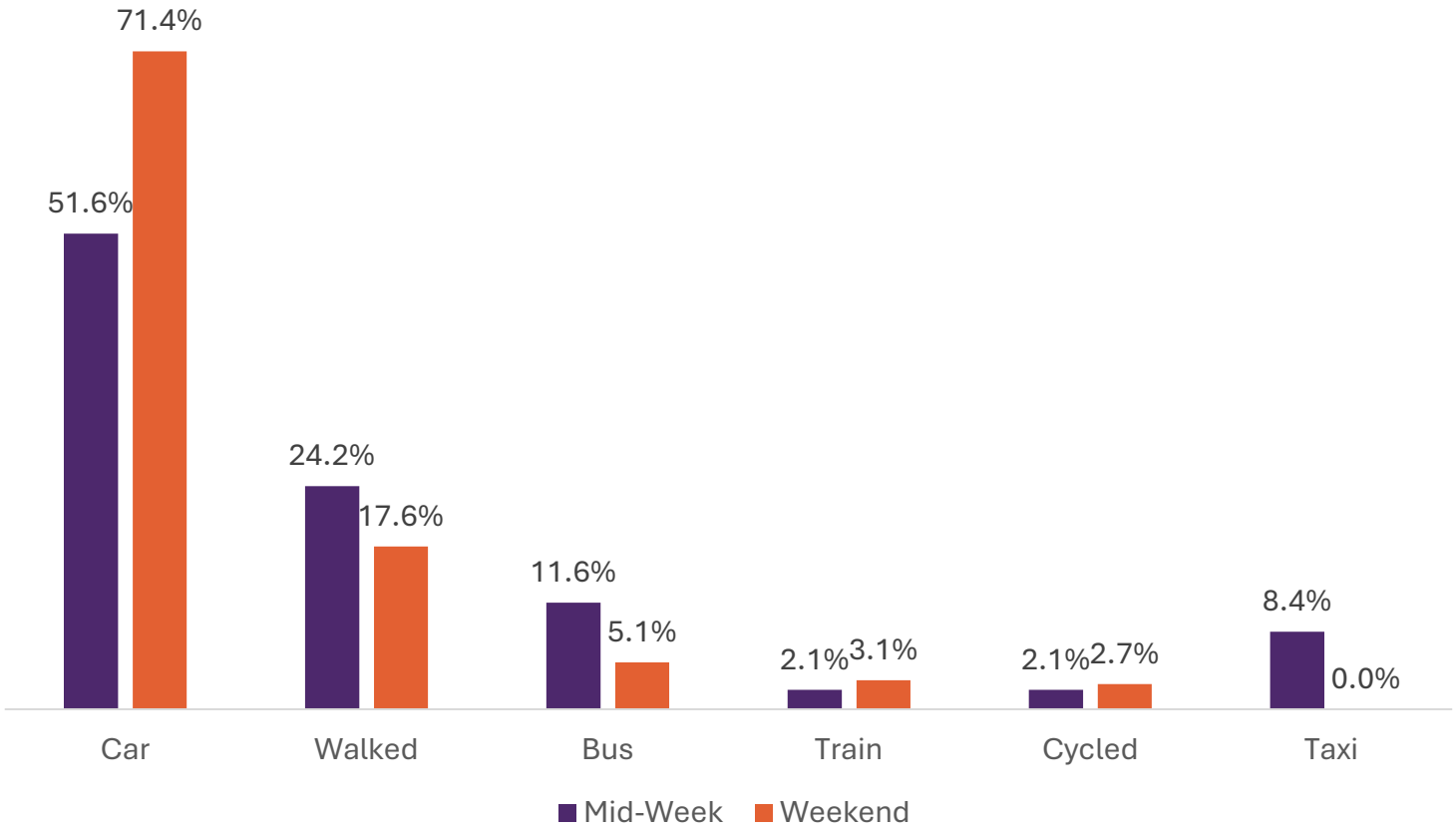
AGE PROFILE



MODE OF TRANSPORT USED BY RESPONDENTS

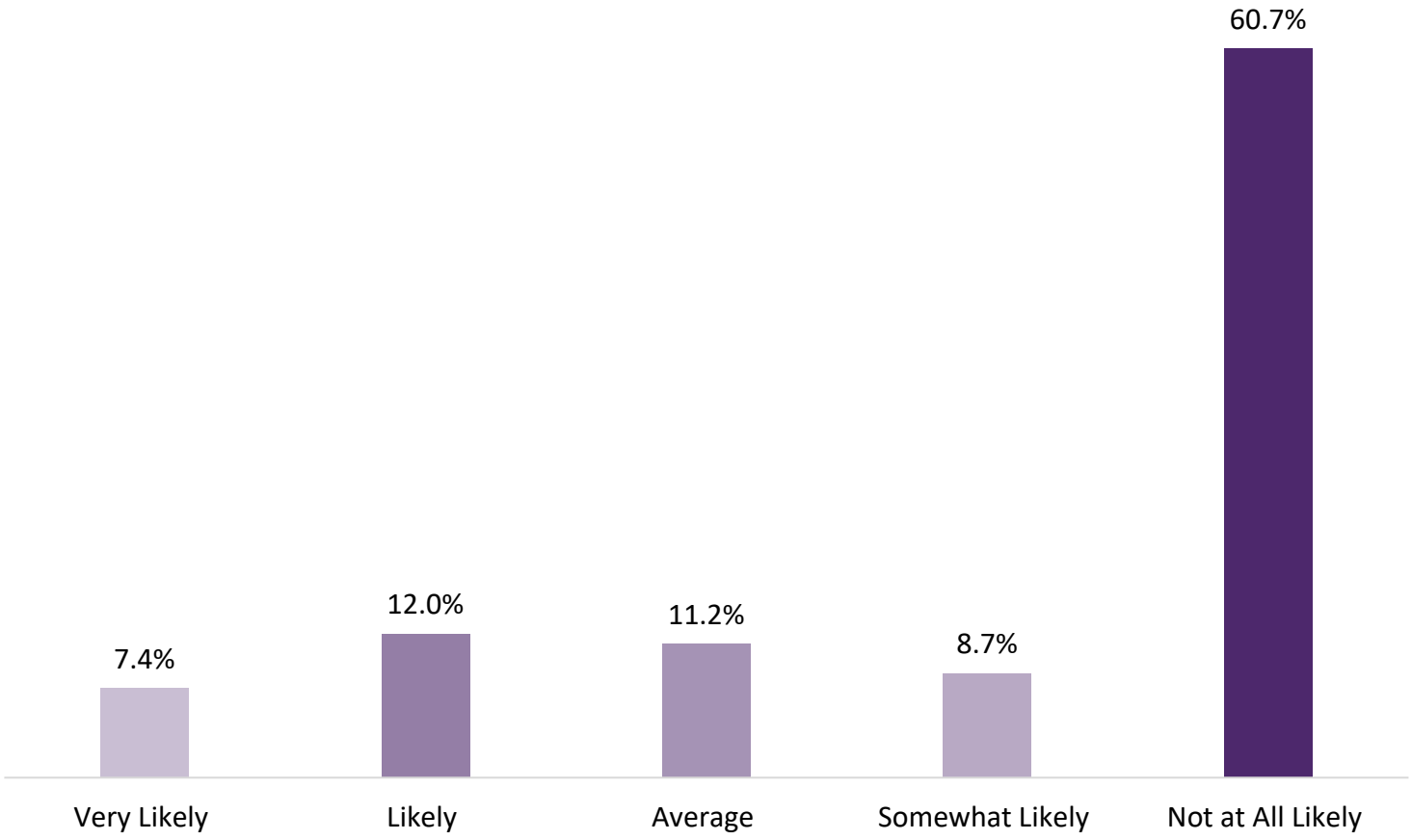


MODE OF TRANSPORT USED BY RESPONDENTS ANALYSED BY MID-WEEK/WEEKEND

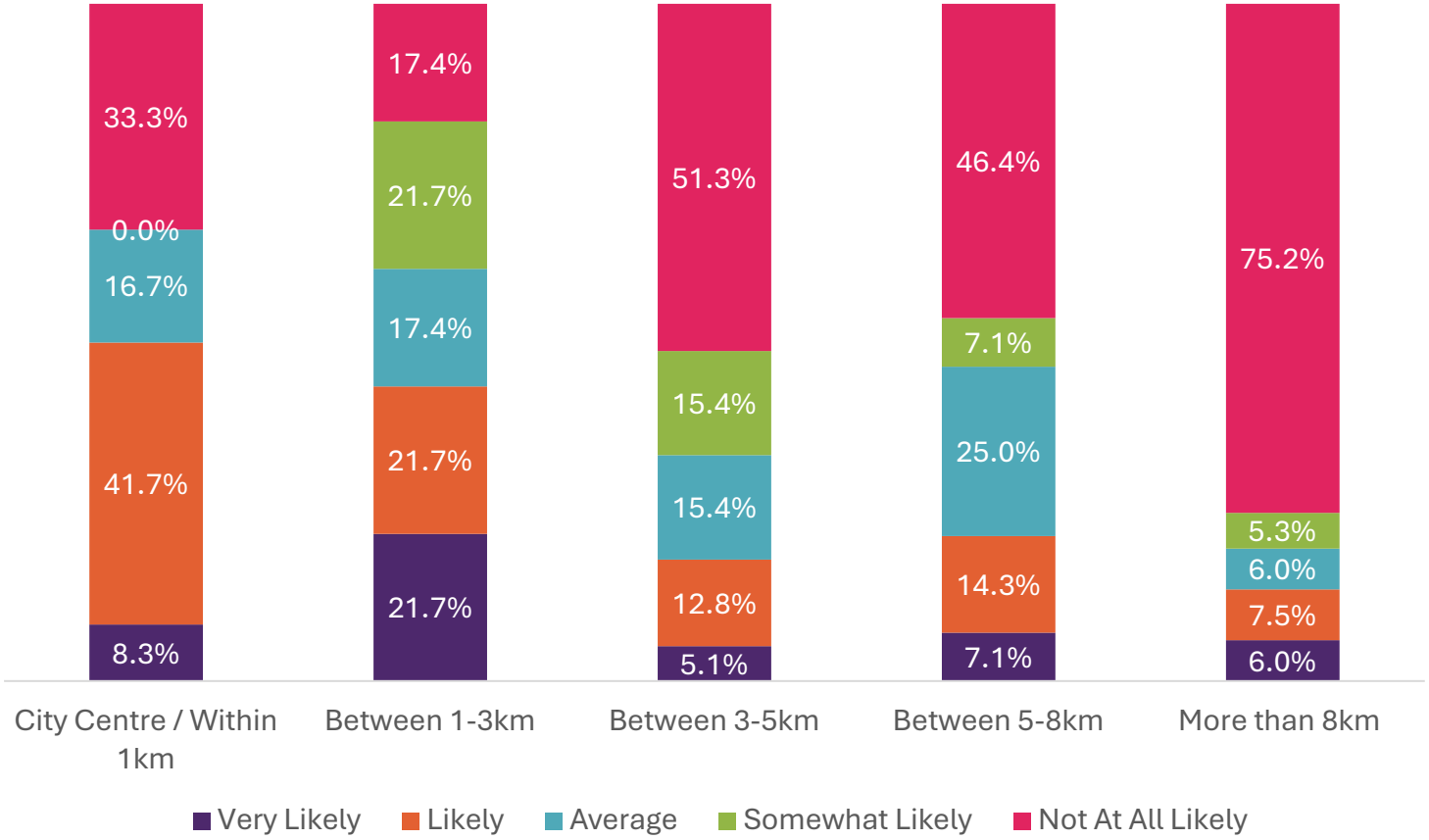


REPUCON CONSULTING

LIKELIHOOD OF CAR USERS WALKING OR CYCLING TO THE AREA IF NEW CYCLE LANES OR PEDESTRIAN AREA PROVIDED



LIKELIHOOD OF CAR USERS WALKING OR CYCLING TO THE AREA IF NEW CYCLE LANES OR PEDESTRIAN AREA PROVIDED ANALYSED BY DISTANCE LIVED FROM CITY CENTRE



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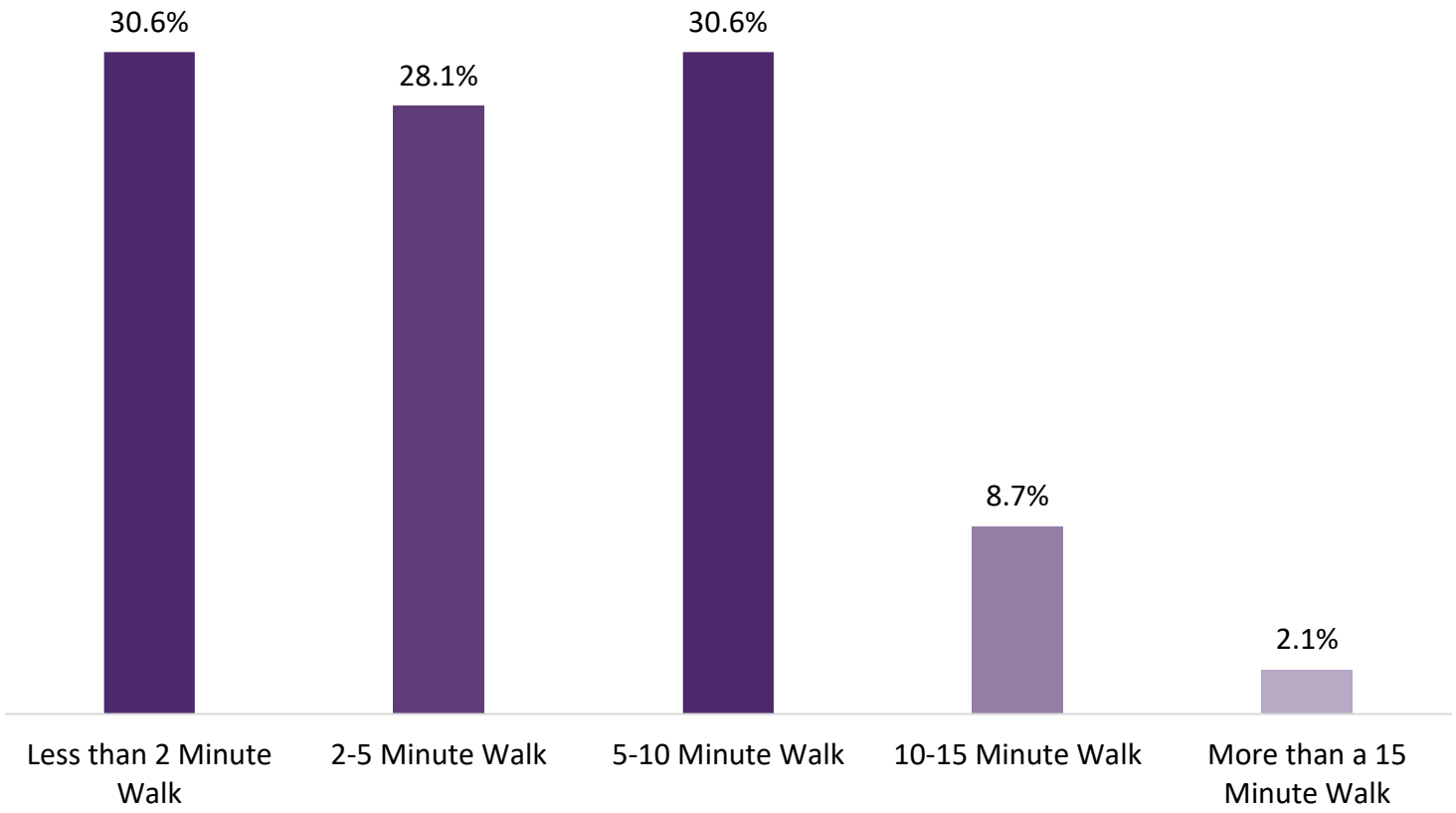
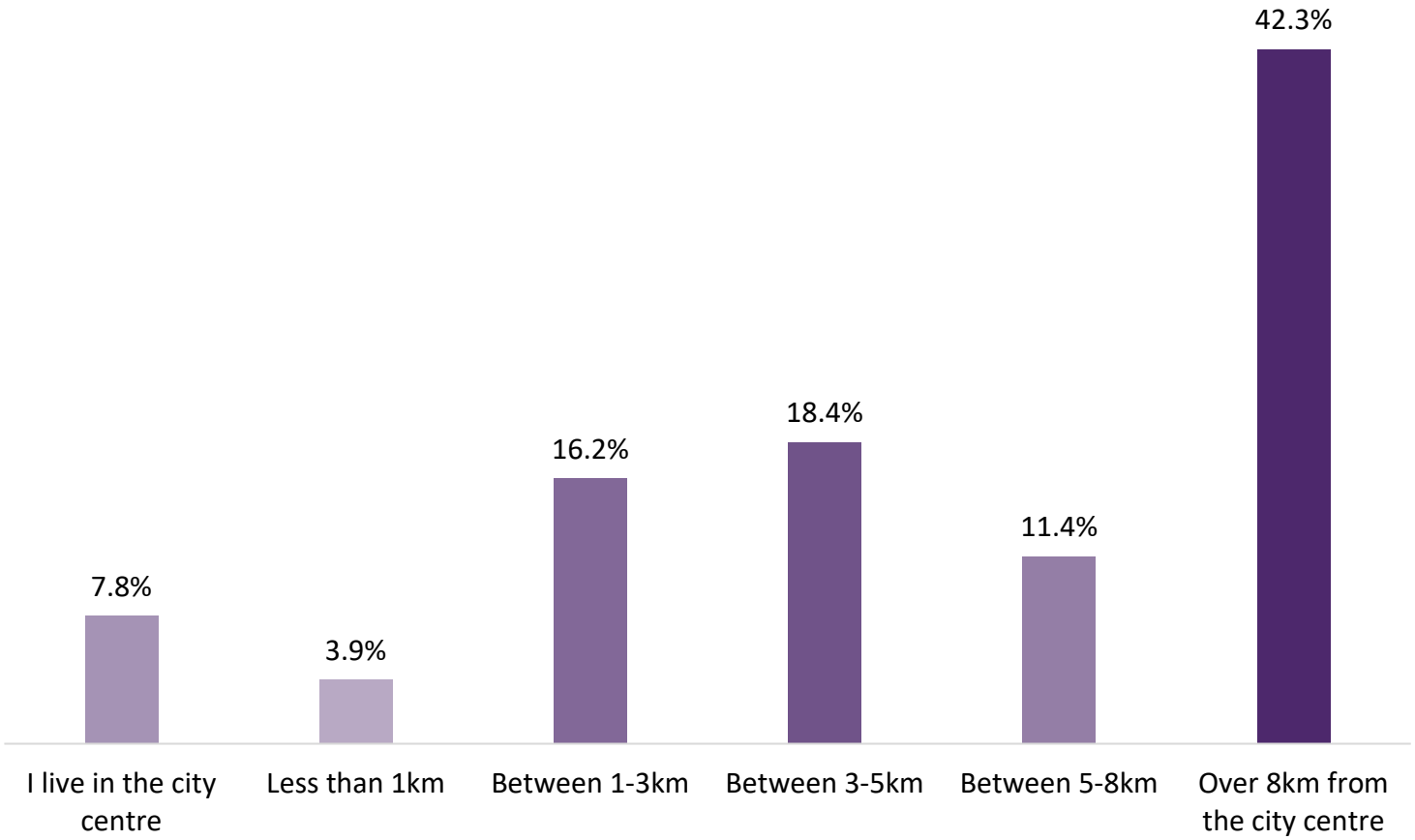
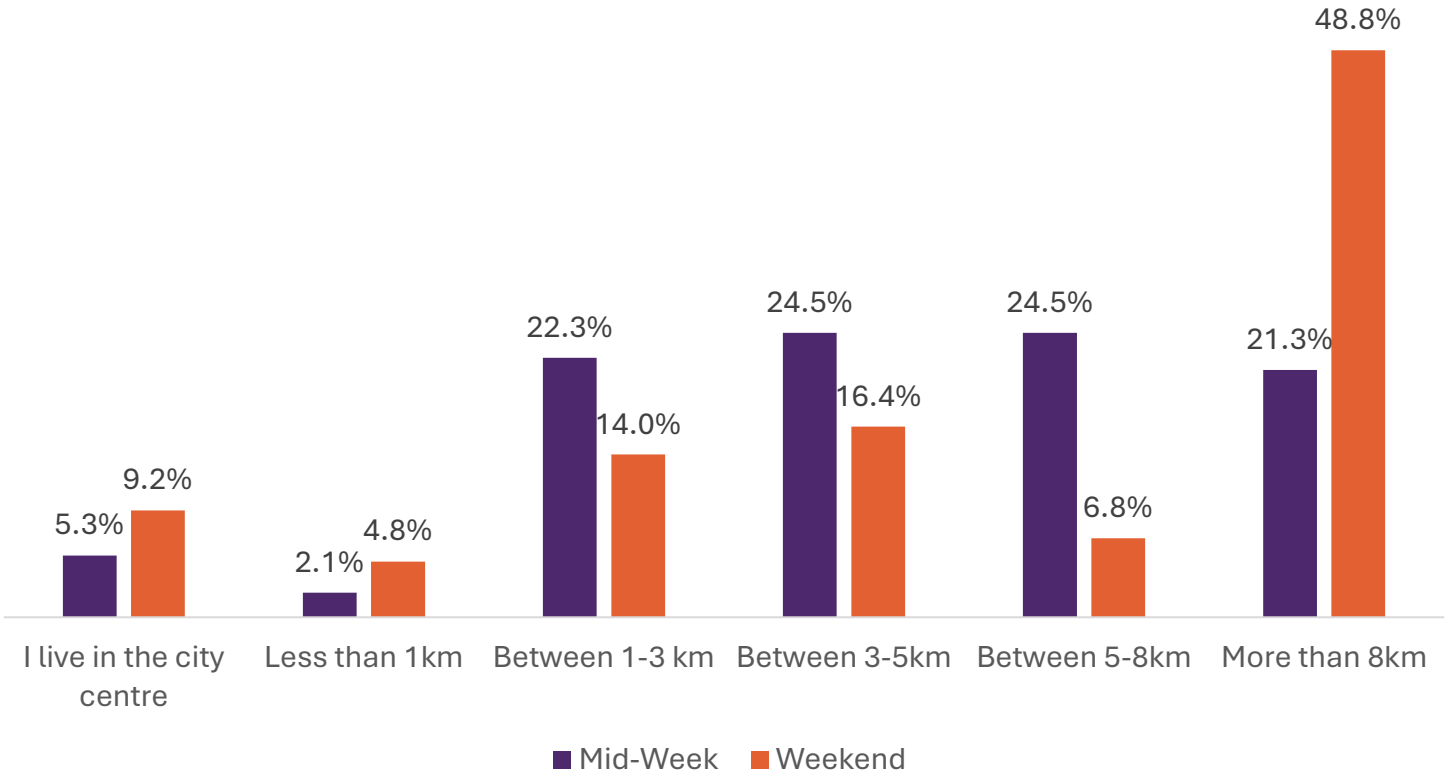
HOW FAR AWAY DID RESPONDENTS PARK THEIR CAR



HOW FAR DO RESPONDENTS LIVE FROM THE CITY CENTRE



HOW FAR DO RESPONDENTS LIVE FROM THE CITY CENTRE ANALYSED BY MID-WEEK / WEEKEND



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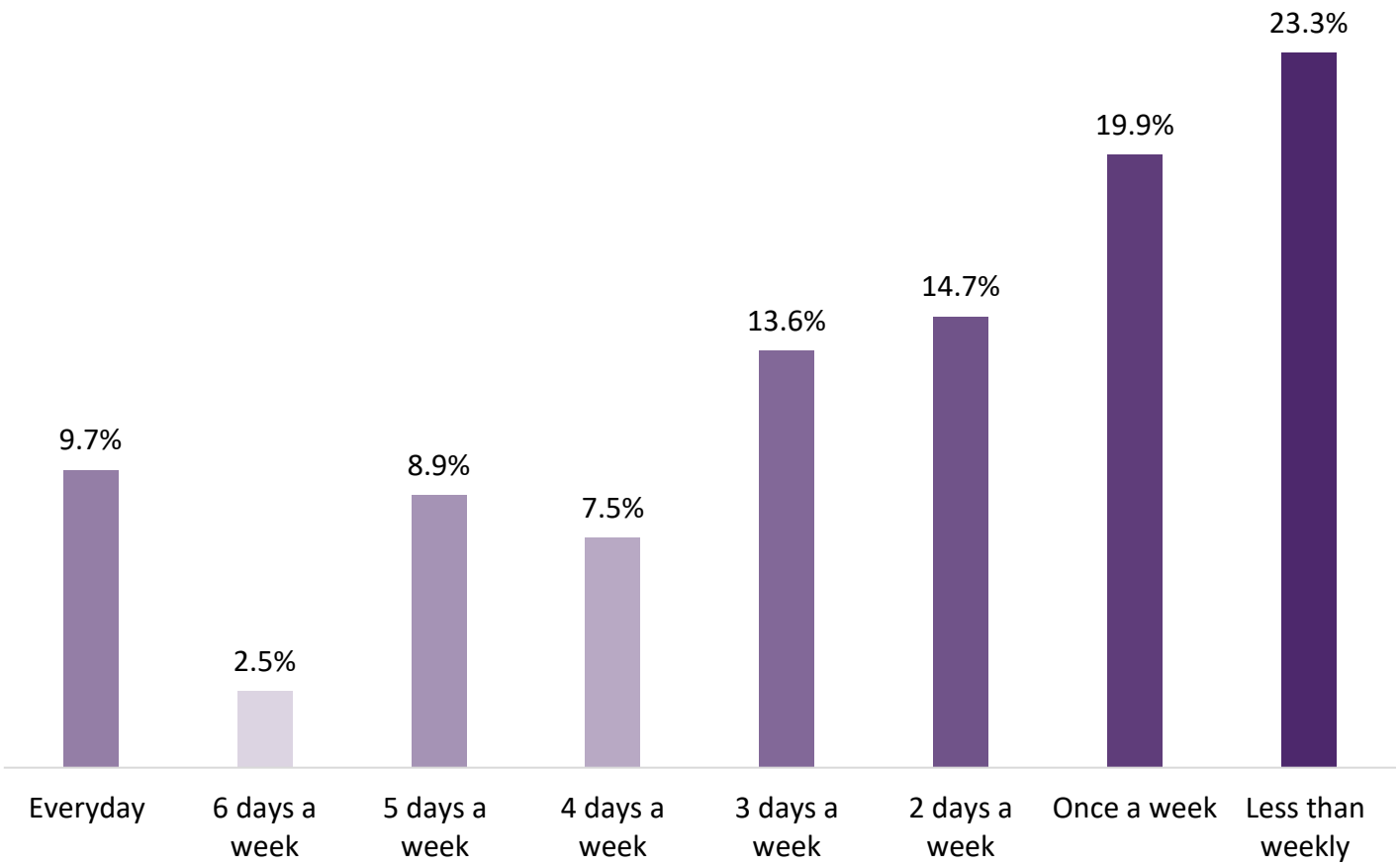
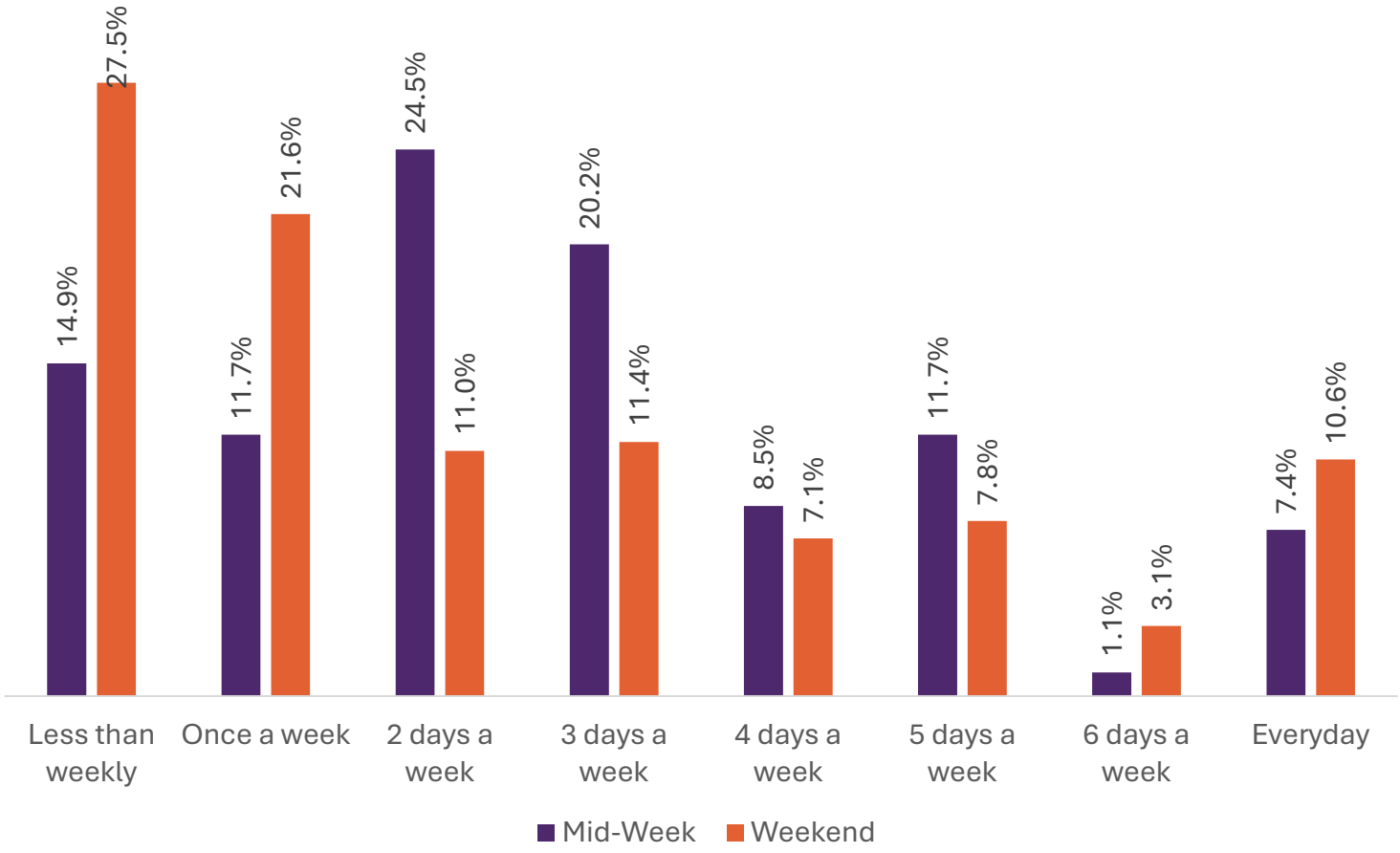
FREQUENCY OF VISITS TO THE CITY CENTRE BY RESPONDENTS

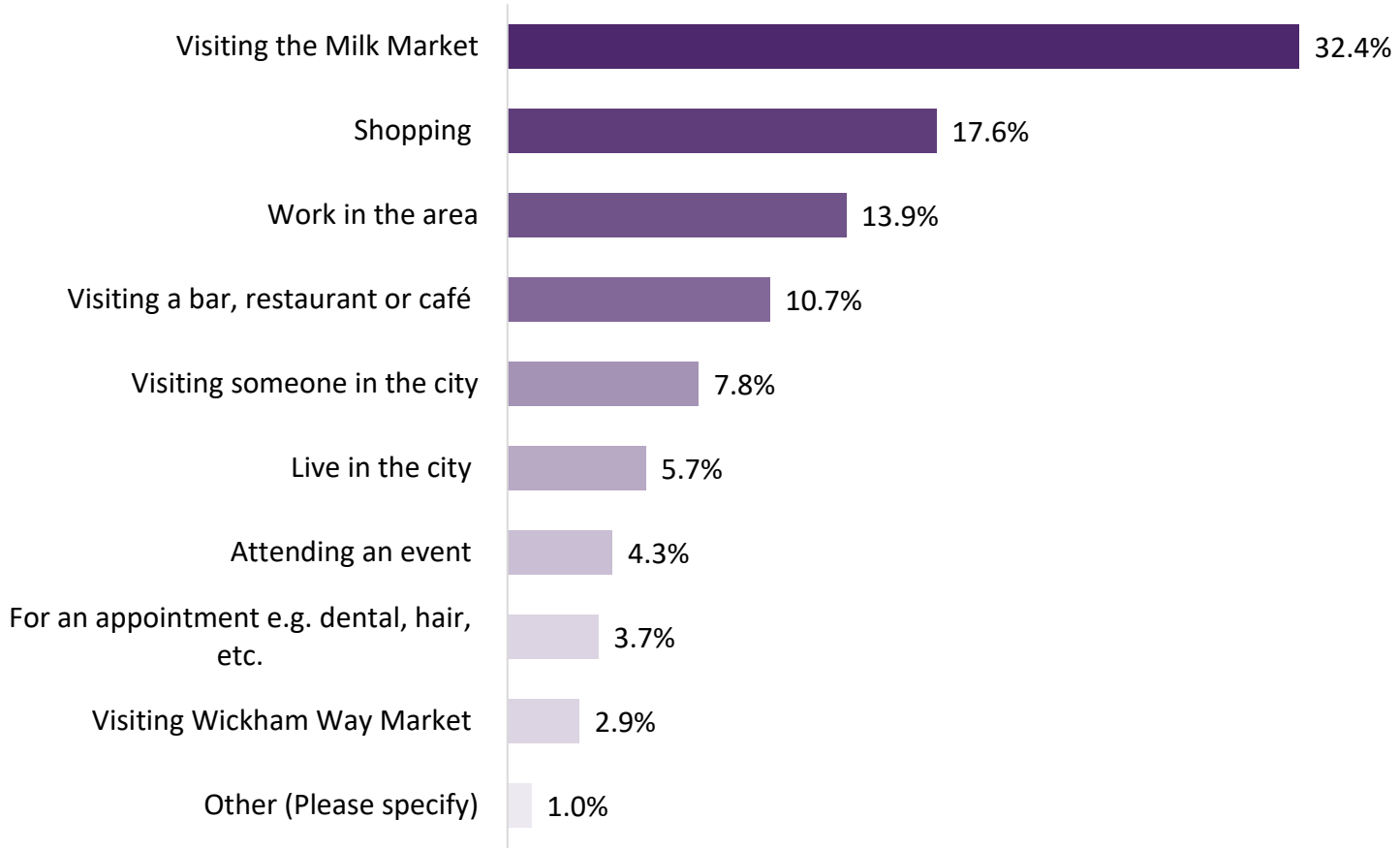


FREQUENCY OF VISITS TO THE CITY CENTRE BY RESPONDENTS ANALYSED BY MID-WEEK / WEEKEND

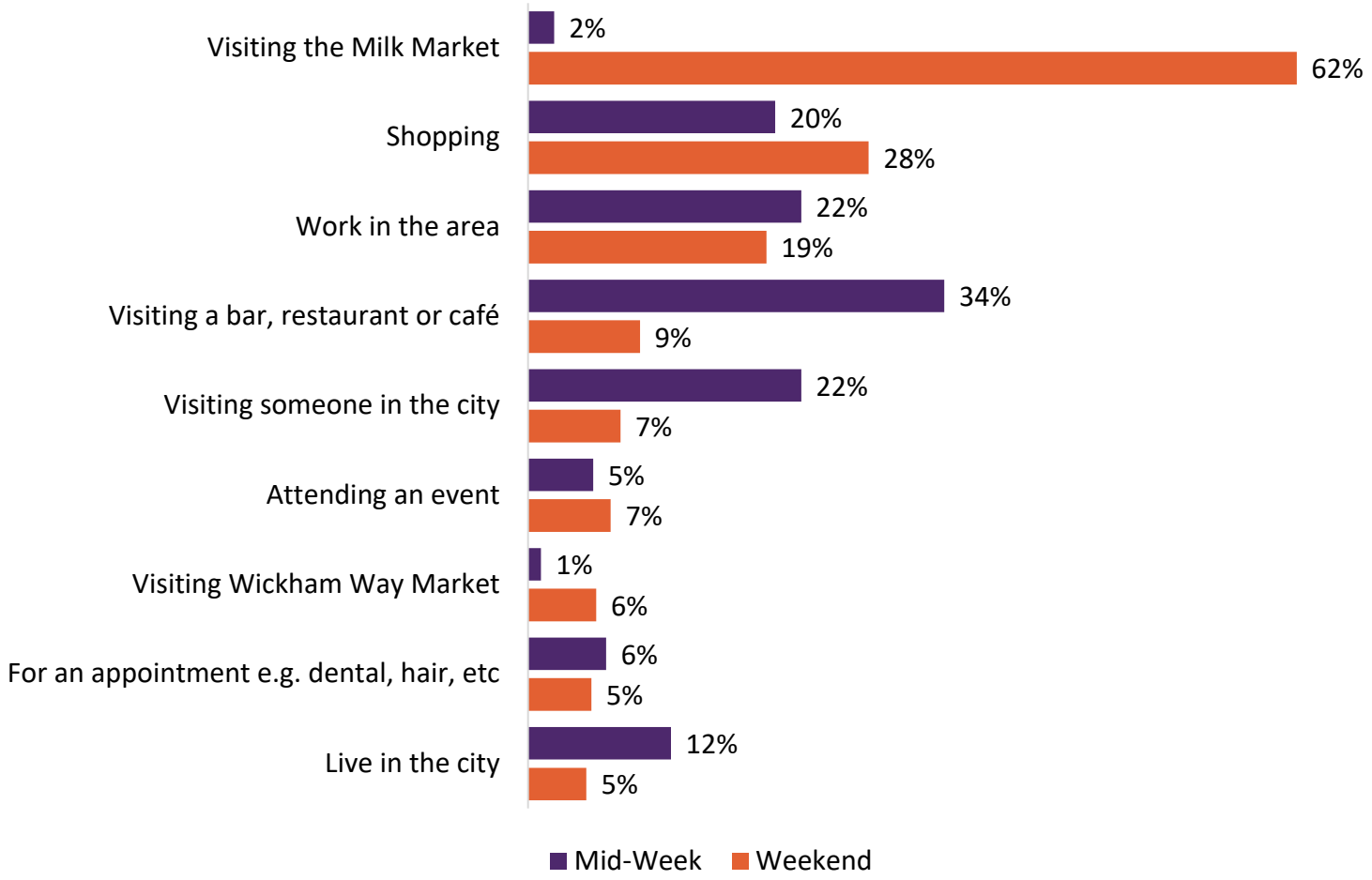


REPUCON CONSULTING

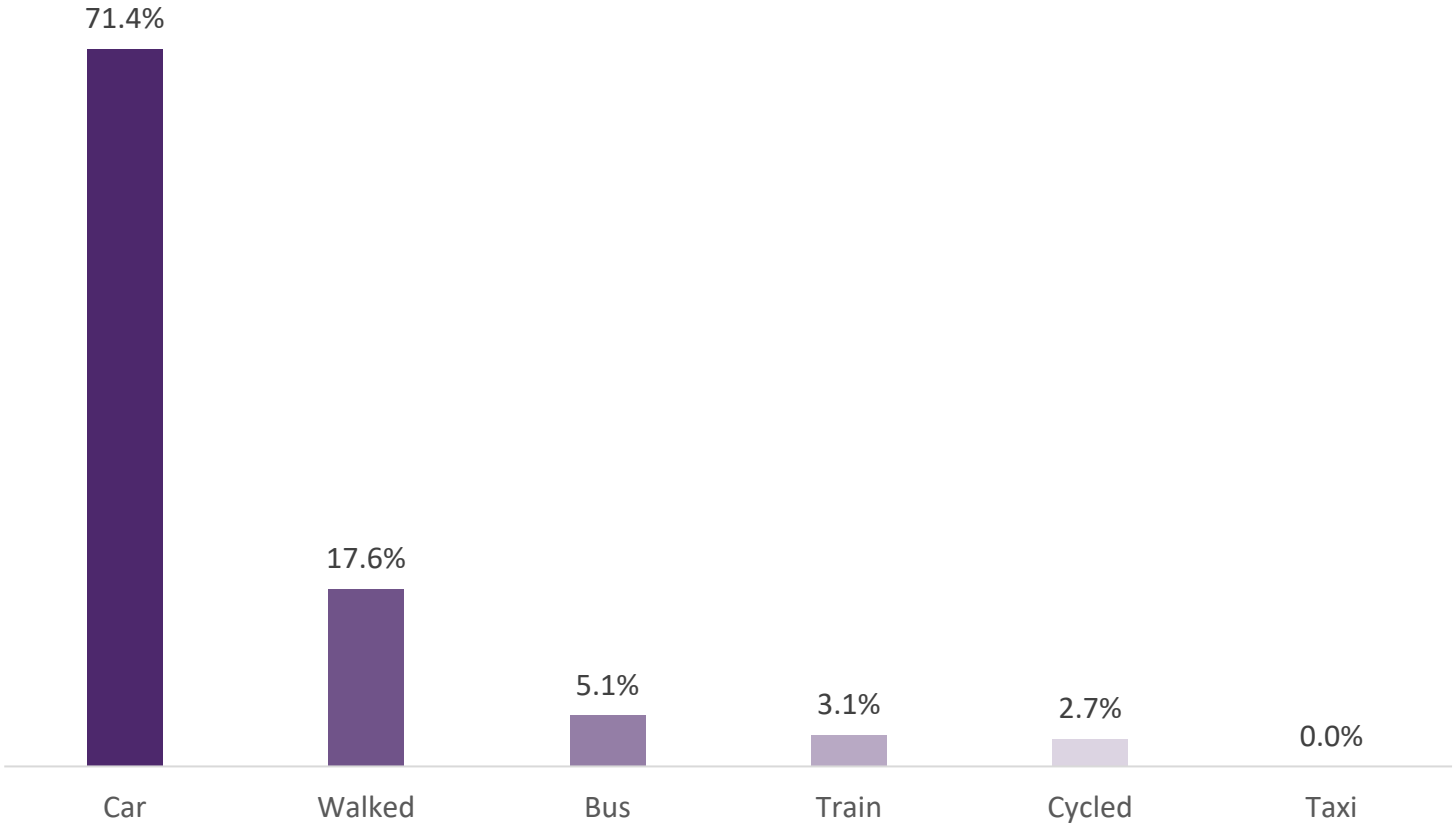
MAIN REASON FOR VISITING THE AREA



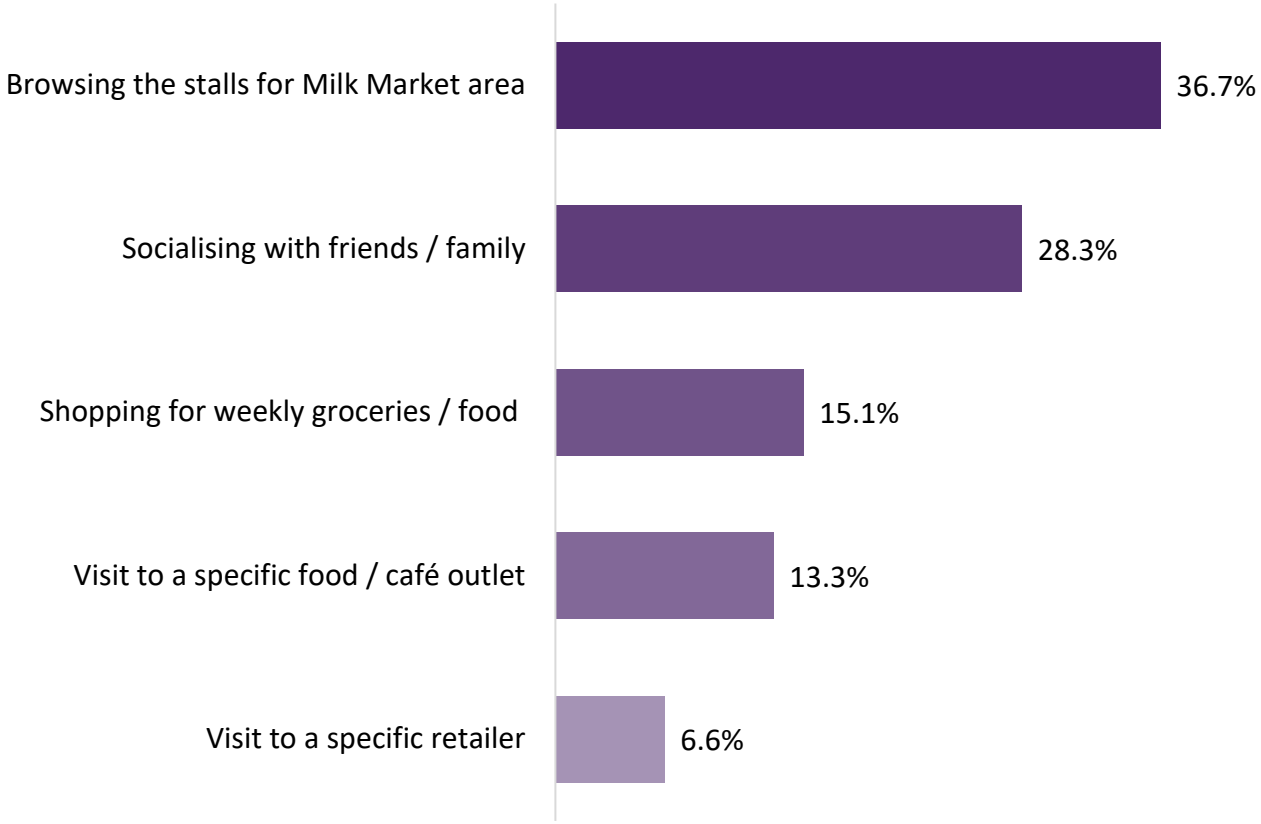
MAIN REASON FOR VISITING THE AREA – ANALYSED BY MID-WEEK / WEEKEND



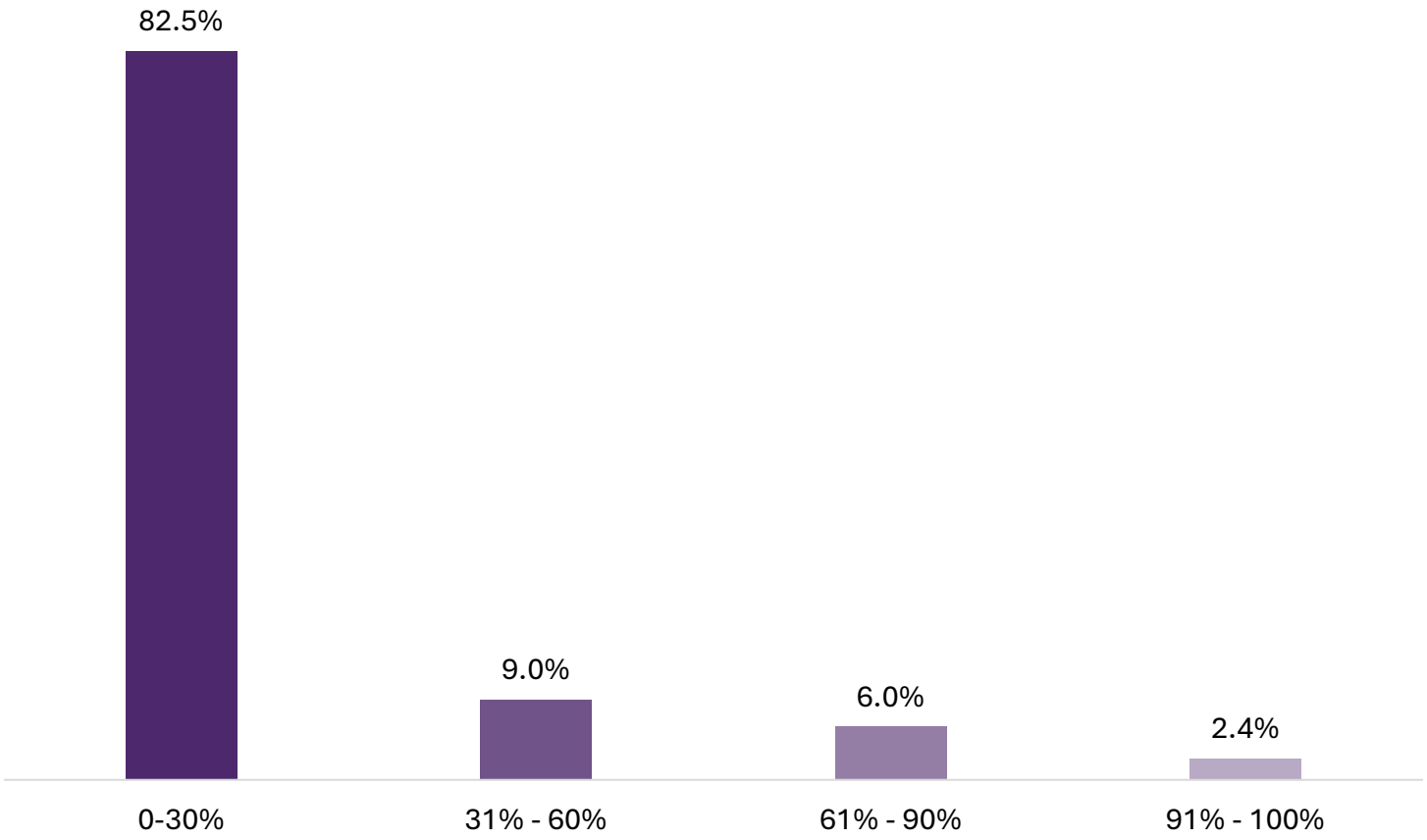
MILK MARKET VISITORS – MODE OF TRANSPORT



MILK MARKET VISITORS – MOTIVATIONS TO VISIT

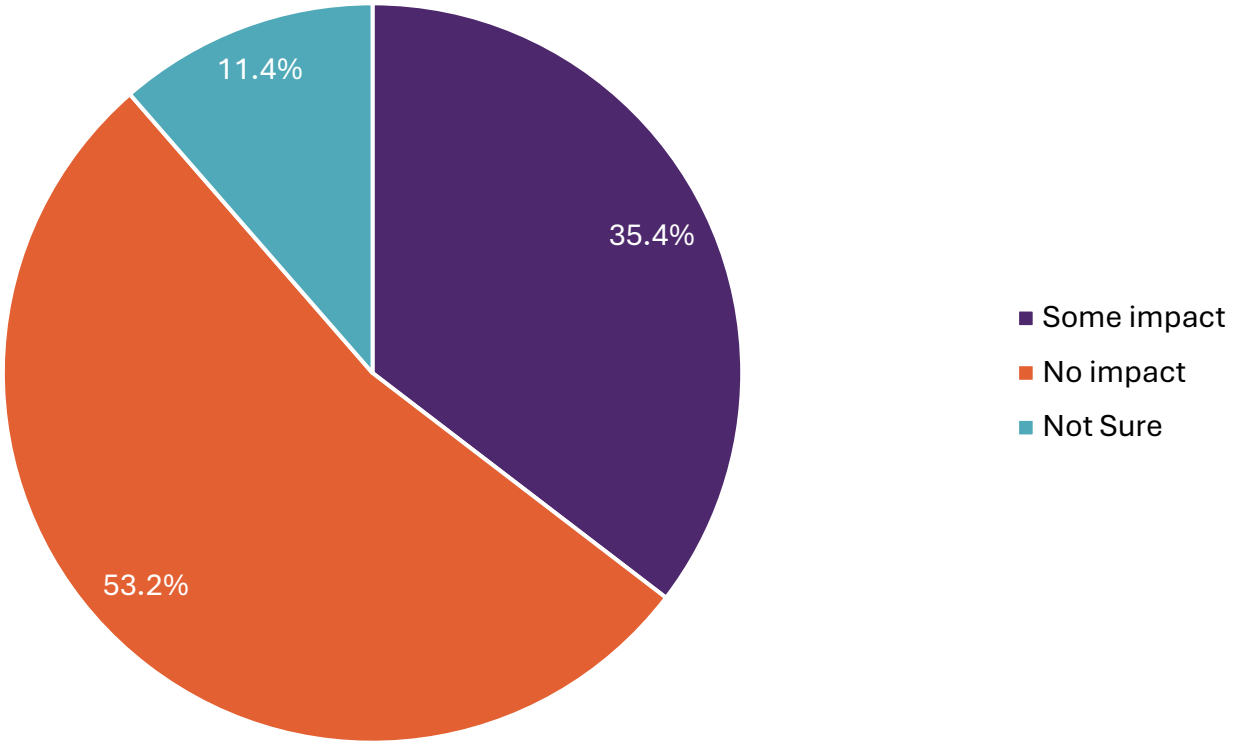


MILK MARKET VISITORS
PROPORTION OF WEEKLY GROCERIES PURCHASED AT THE MILK MARKET

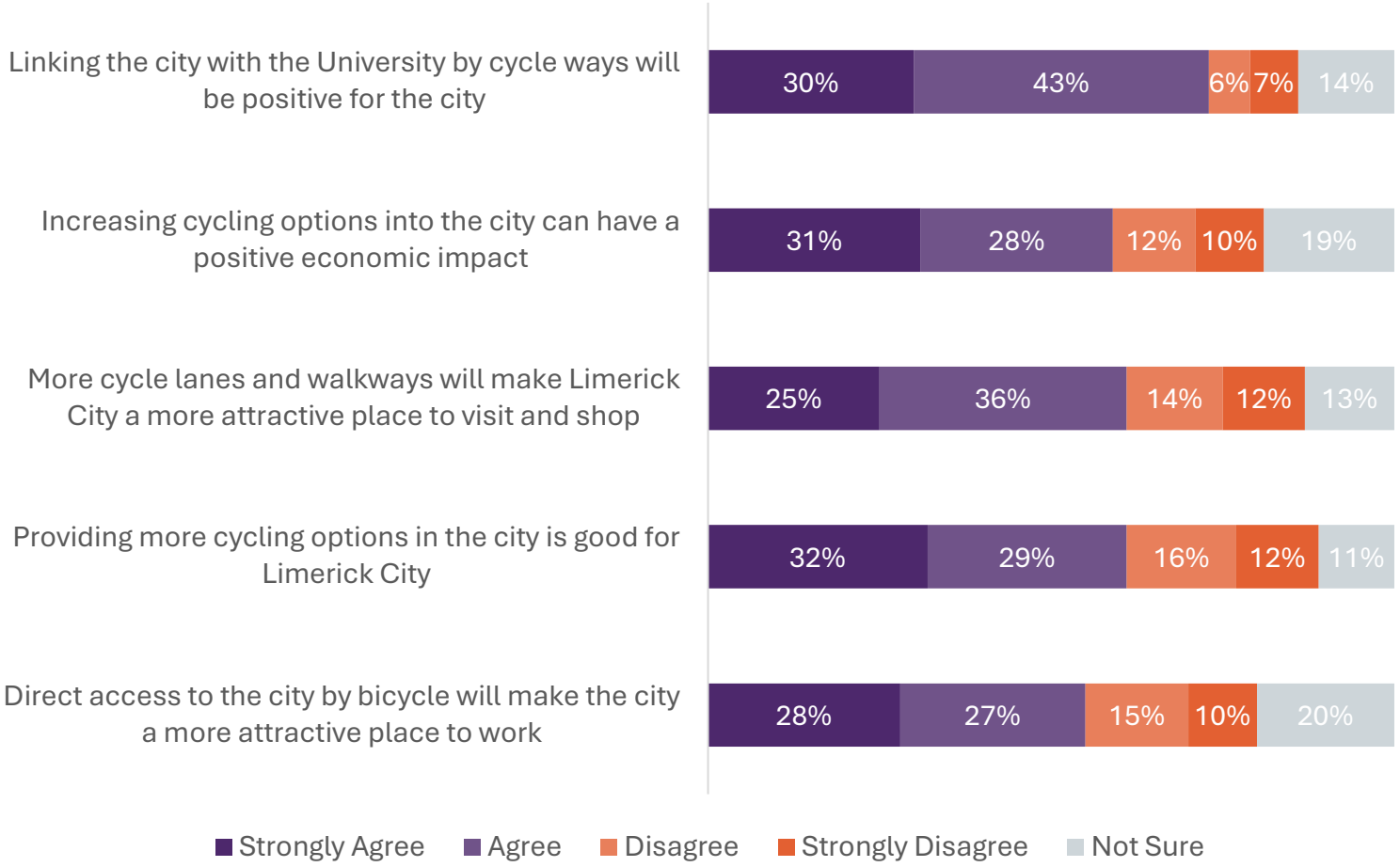


REPUCON CONSULTING

IMPACT ON MILK MARKET VISITOR BEHAVIOUR WITH THE ADDITION OF A CYCLE LANE PASSING THE MILK MARKET

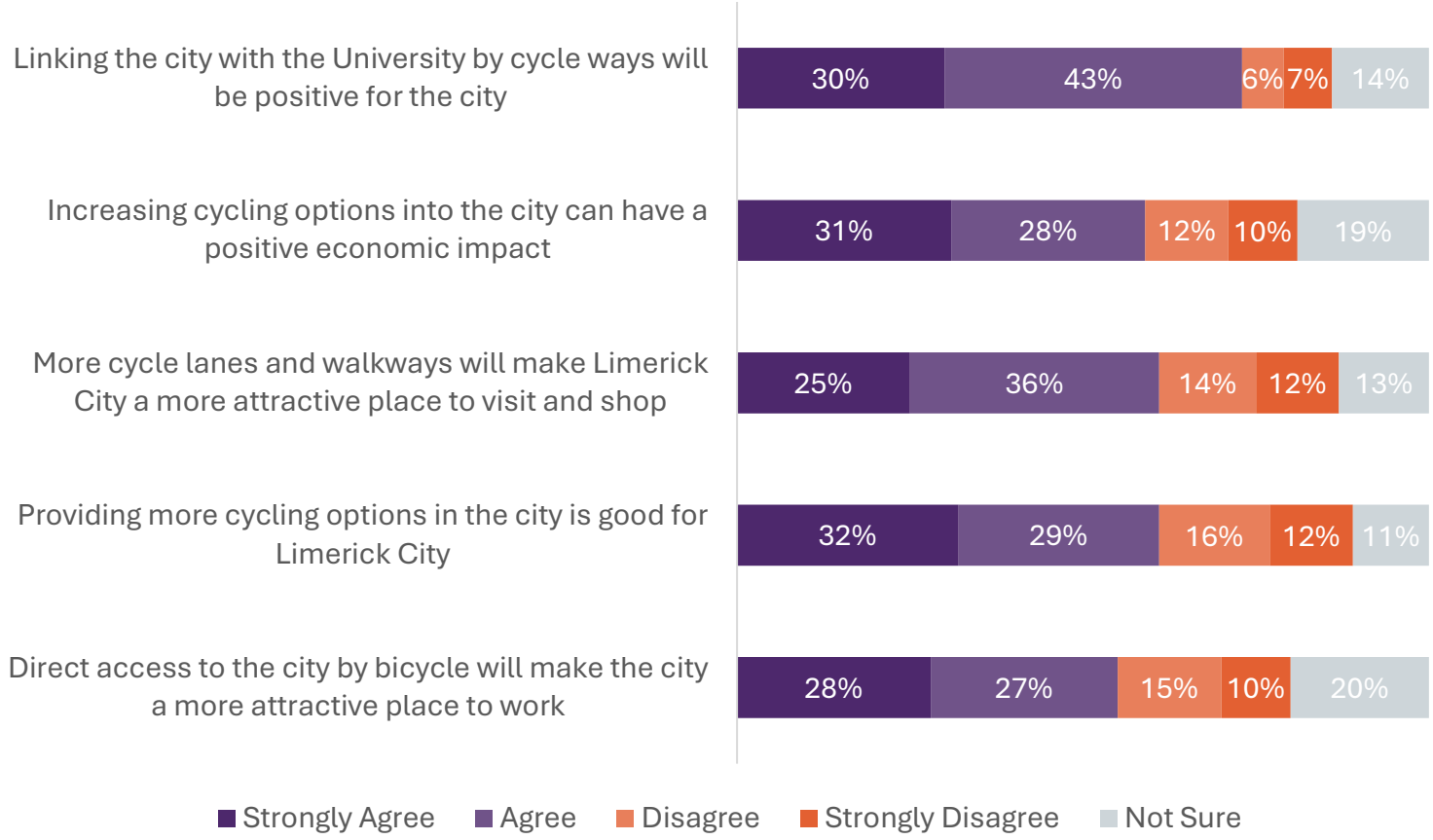


COMMUNITY ATTITUDES TO POTENTIAL ACTIVE TRAVEL IN THE CITY

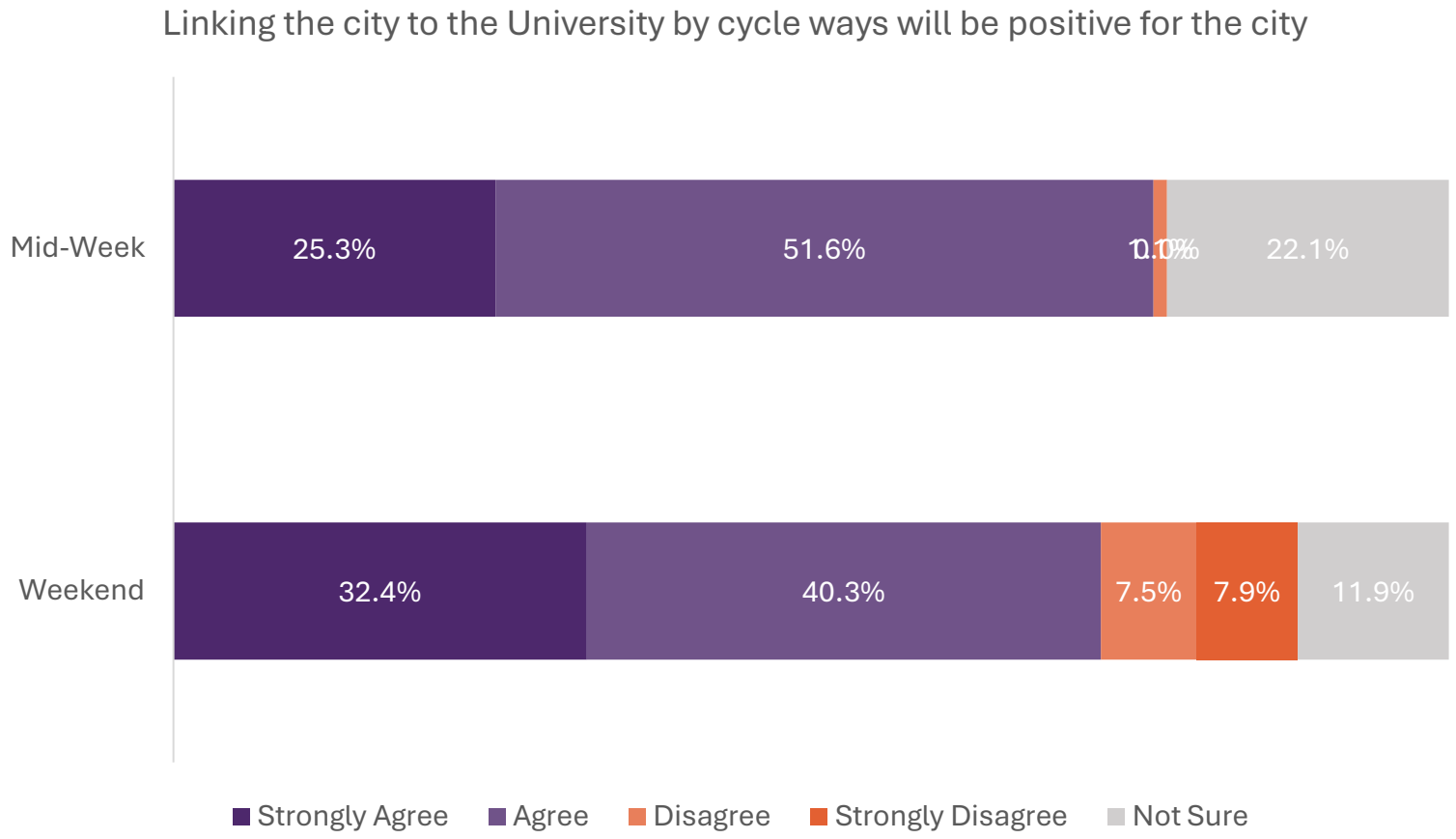


REPUCON CONSULTING

COMMUNITY ATTITUDES TO ACTIVE TRAVEL IN THE CITY

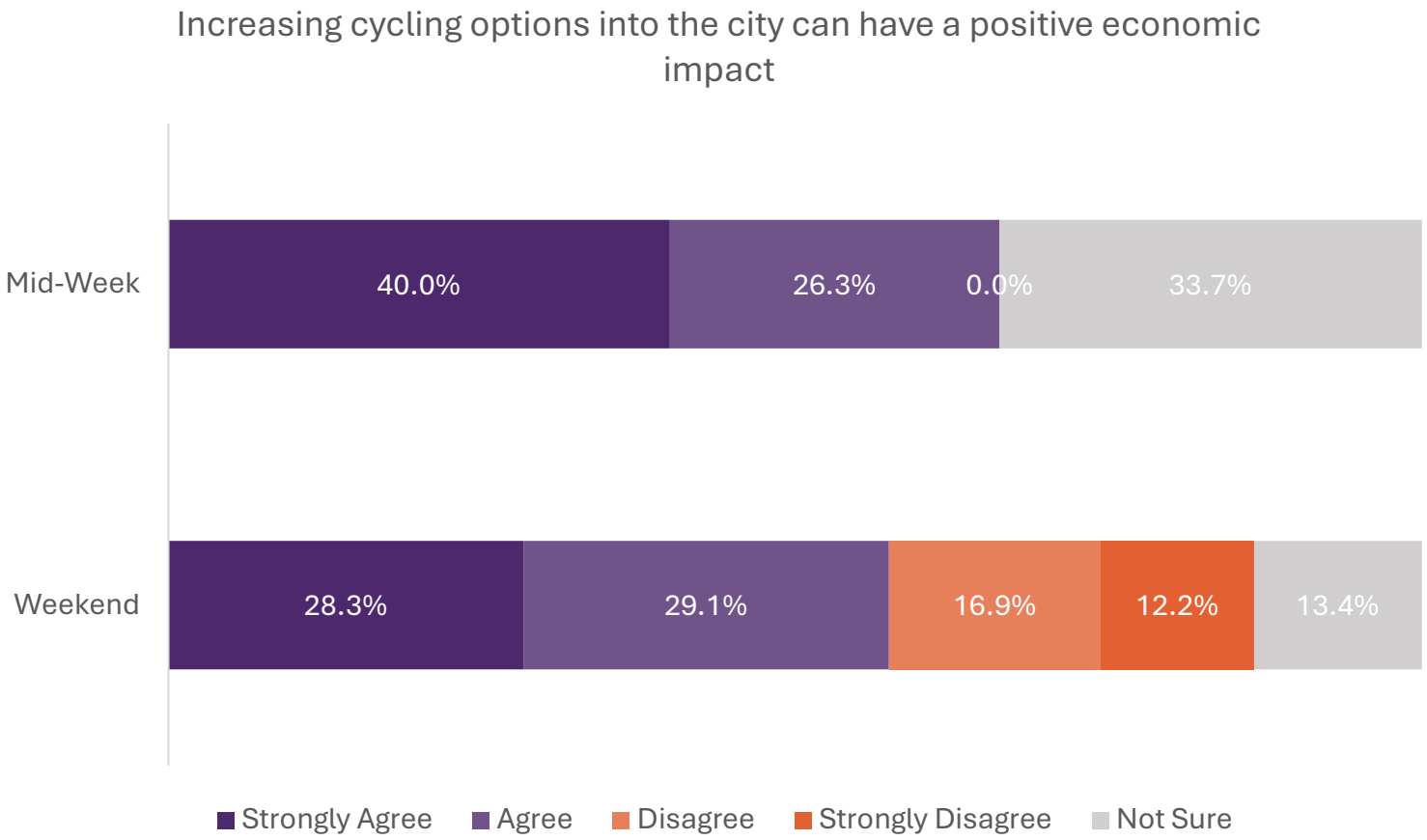


COMMUNITY ATTITUDES TO POTENTIAL ACTIVE TRAVEL IN THE CITY ANALYSED BY MID-WEEK VS WEEKEND

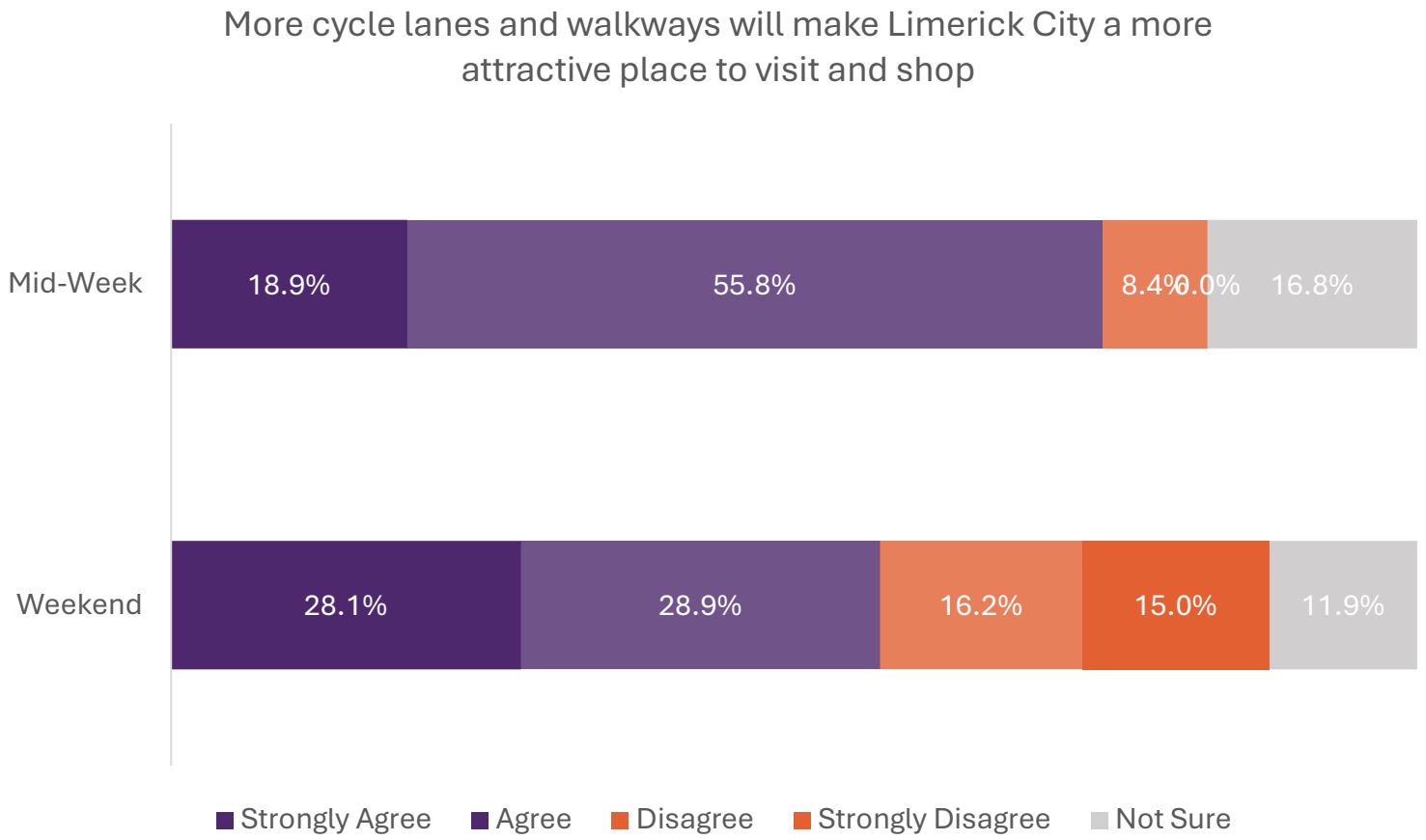


REPUCON CONSULTING

COMMUNITY ATTITUDES TO POTENTIAL ACTIVE TRAVEL IN THE CITY ANALYSED BY MID-WEEK VS WEEKEND

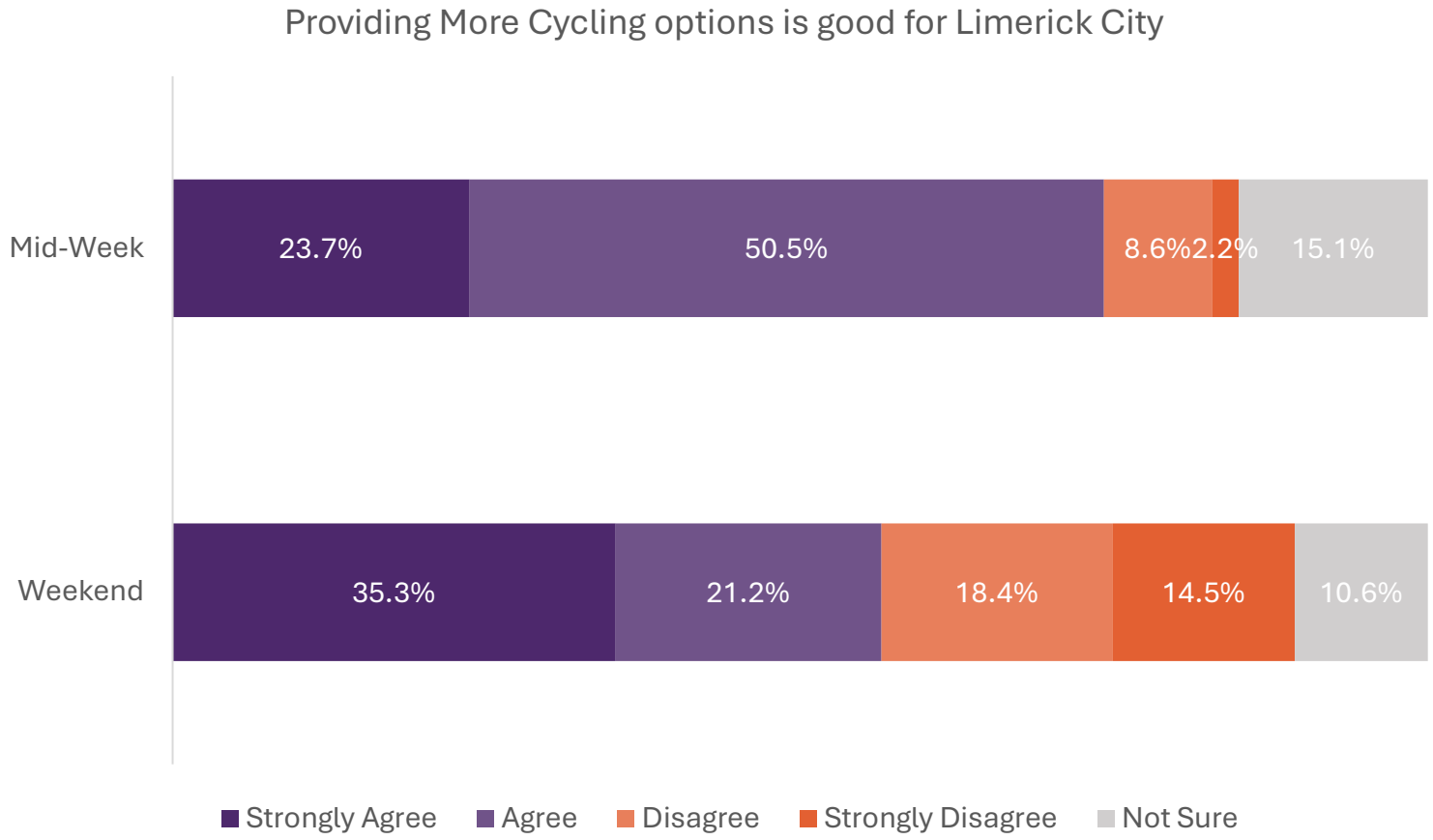


COMMUNITY ATTITUDES TO POTENTIAL ACTIVE TRAVEL IN THE CITY ANALYSED BY MID-WEEK VS WEEKEND



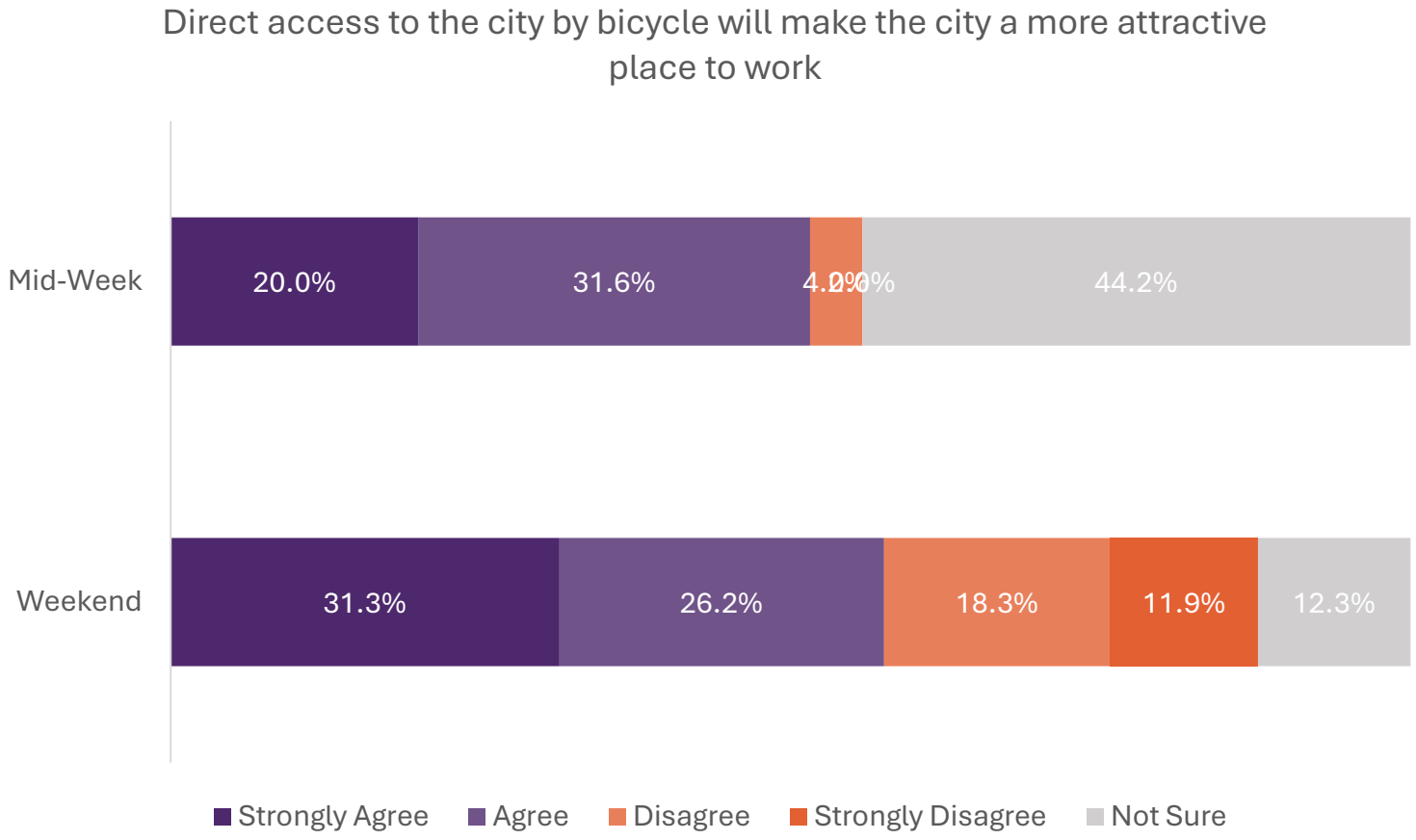
REPUCON CONSULTING

COMMUNITY ATTITUDES TO POTENTIAL ACTIVE TRAVEL IN THE CITY ANALYSED BY MID-WEEK VS WEEKEND



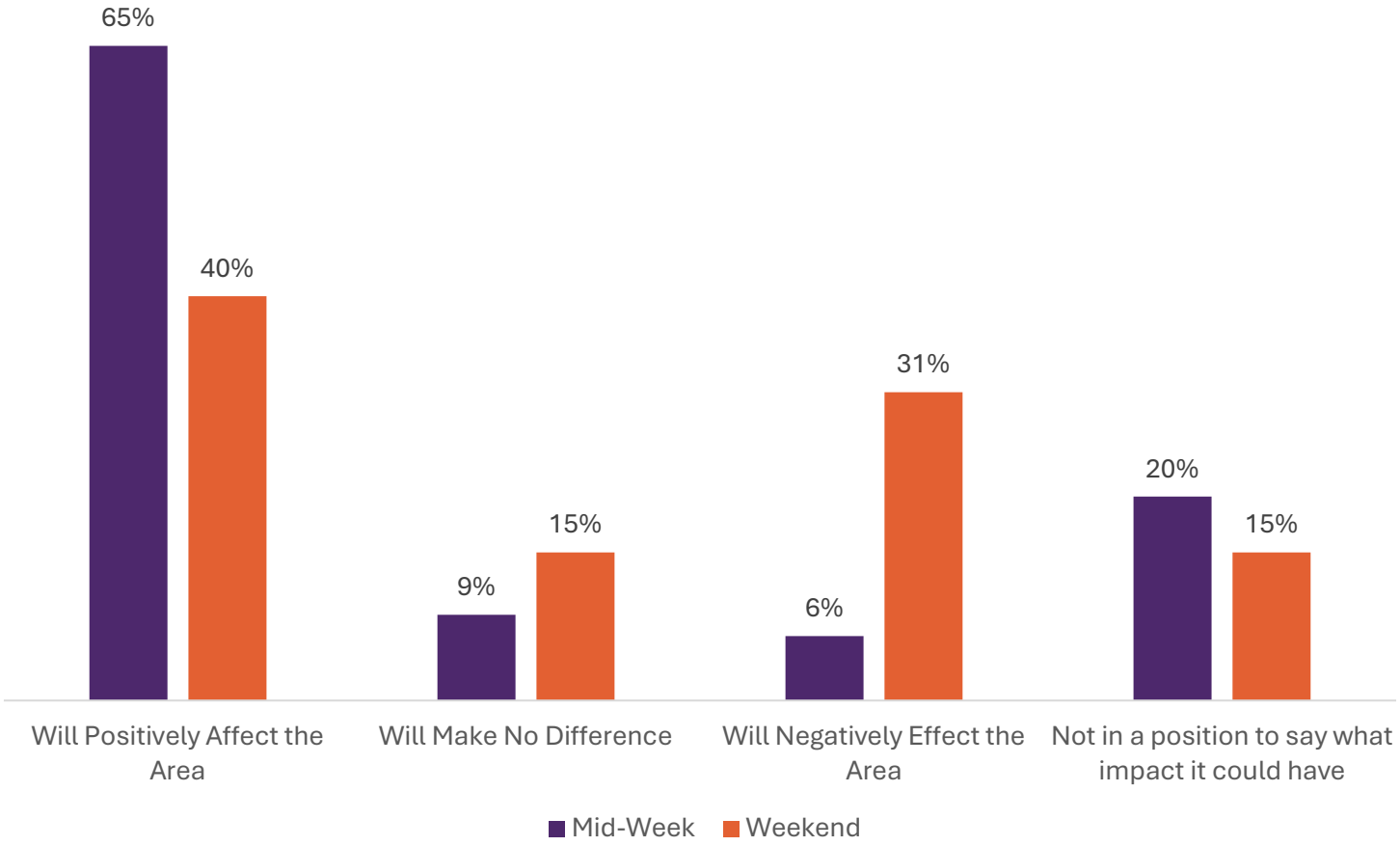
REPUCON CONSULTING

COMMUNITY ATTITUDES TO POTENTIAL ACTIVE TRAVEL IN THE CITY ANALYSED BY MID-WEEK VS WEEKEND



REPUCON CONSULTING

COMMUNITY ATTITUDES TO THE POTENTIAL ECONOMIC IMPACT OF AN INCREASE IN CYCLING FACILITIES AND PEDESTRIAN ACCESS ANALYSED BY MID-WEEK VS WEEKEND



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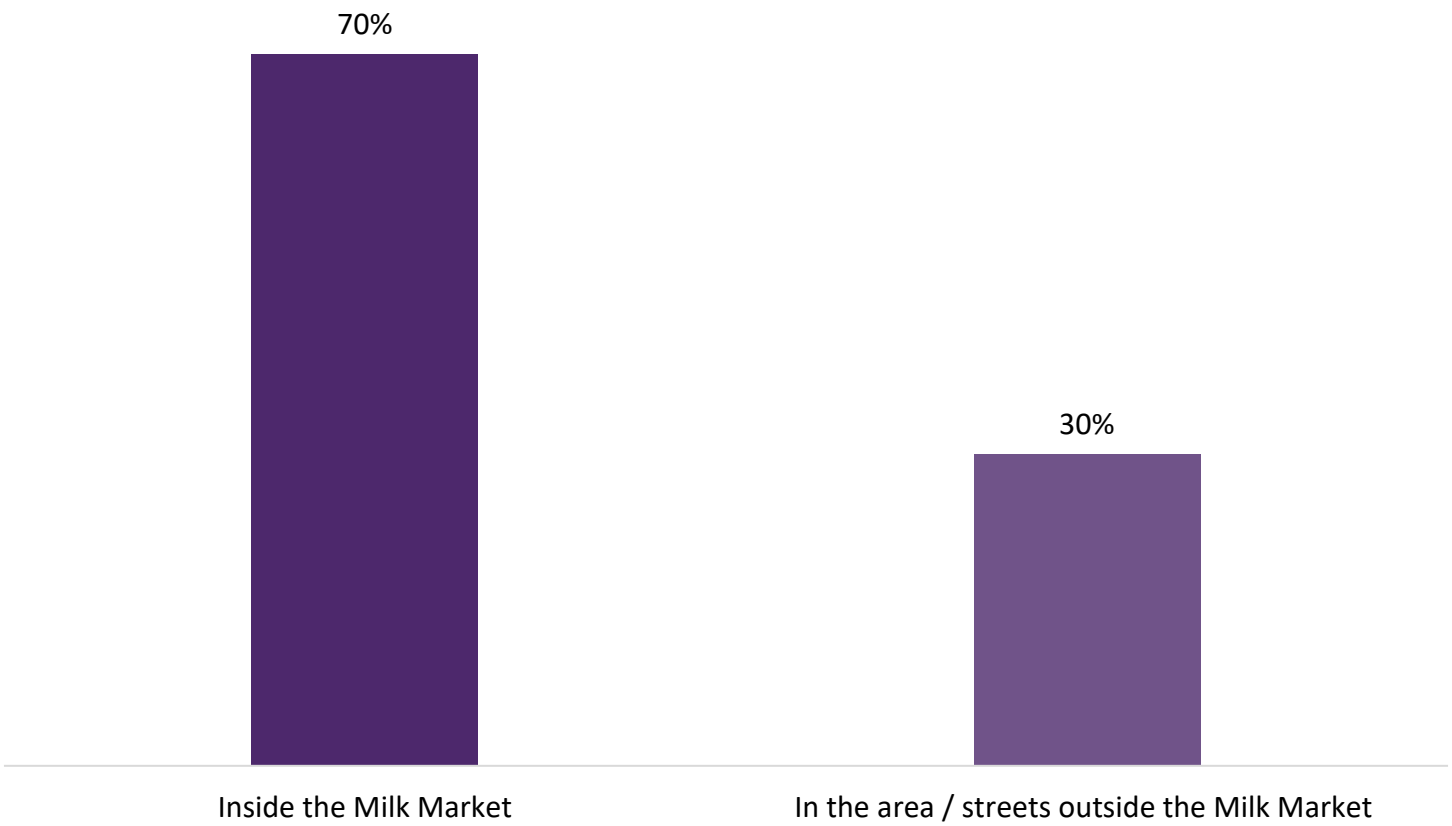
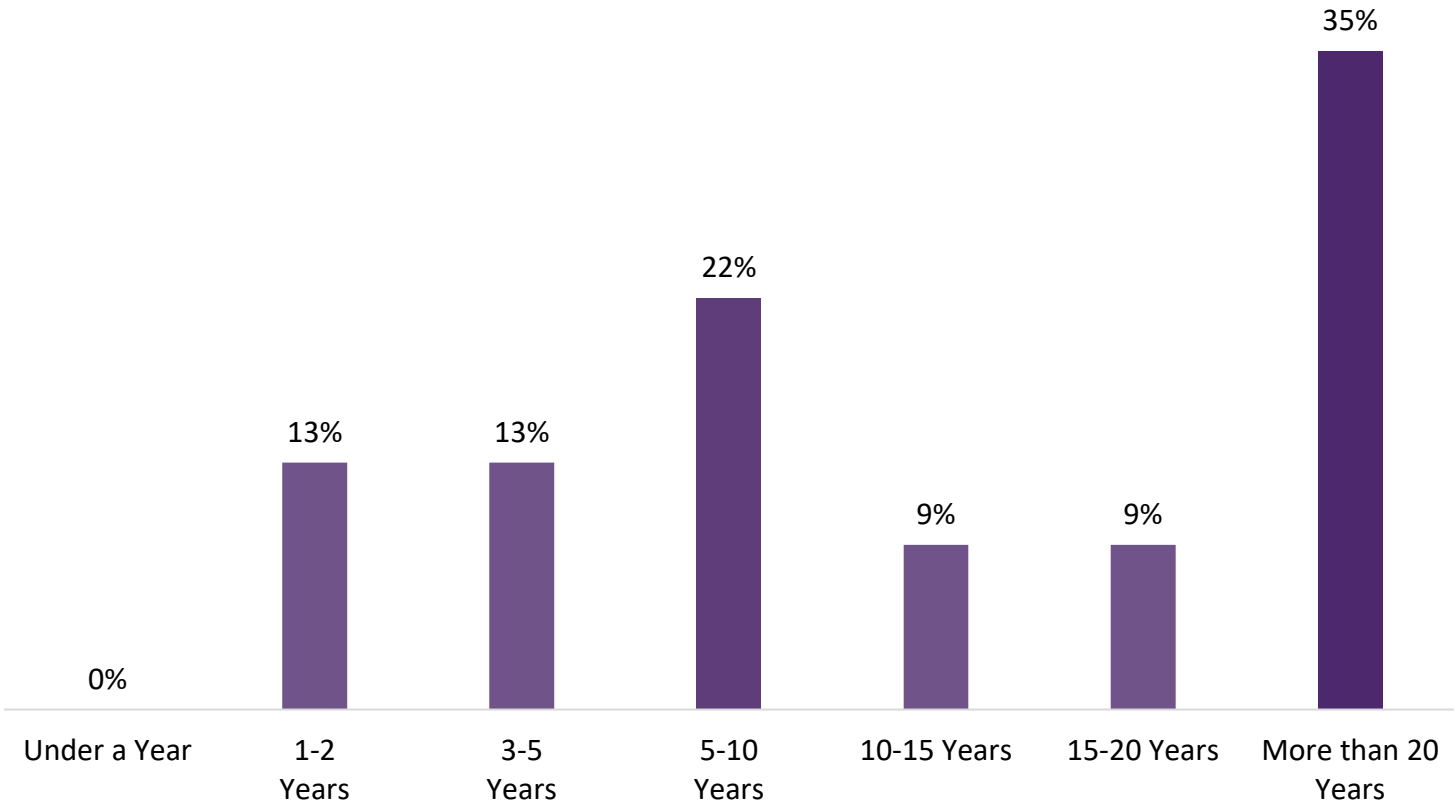
Market Trader Survey

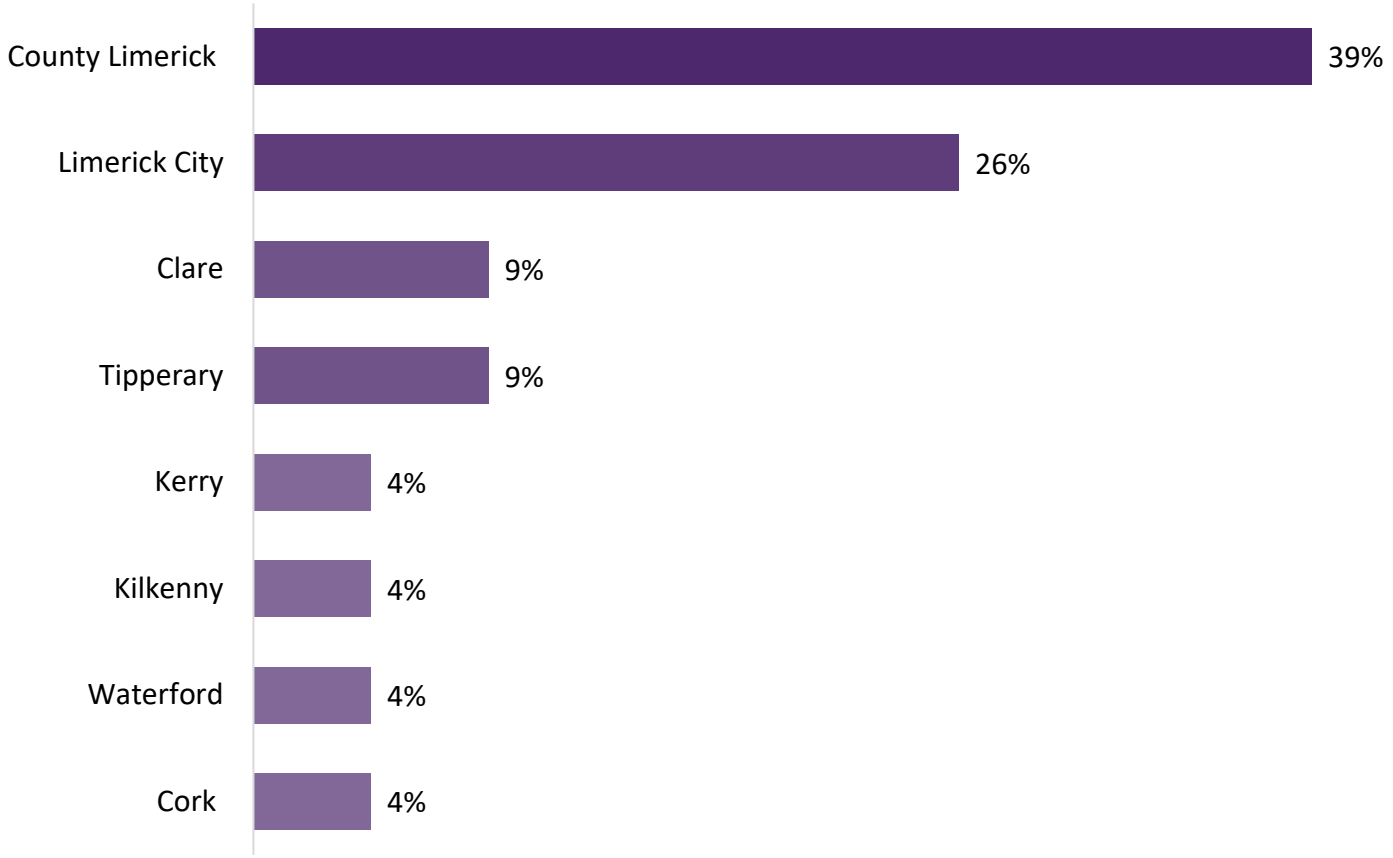
WHERE DO RESPONDENT MARKET TRADERS SET UP



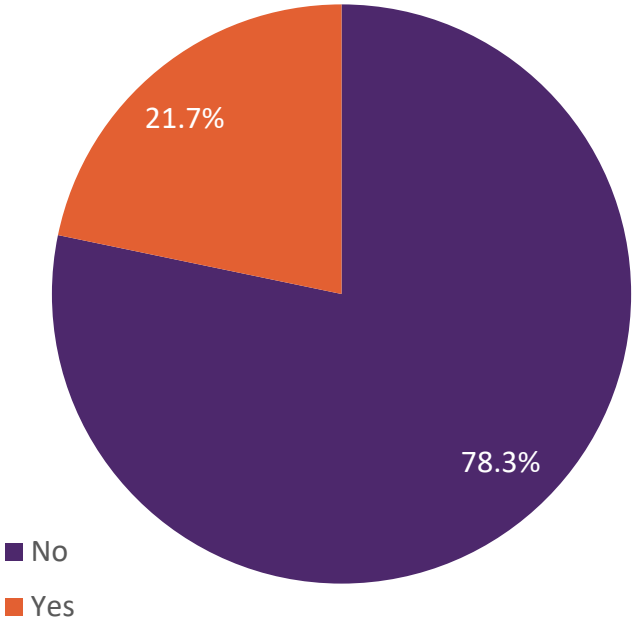
LENGTH OF TIME IN OPERATION

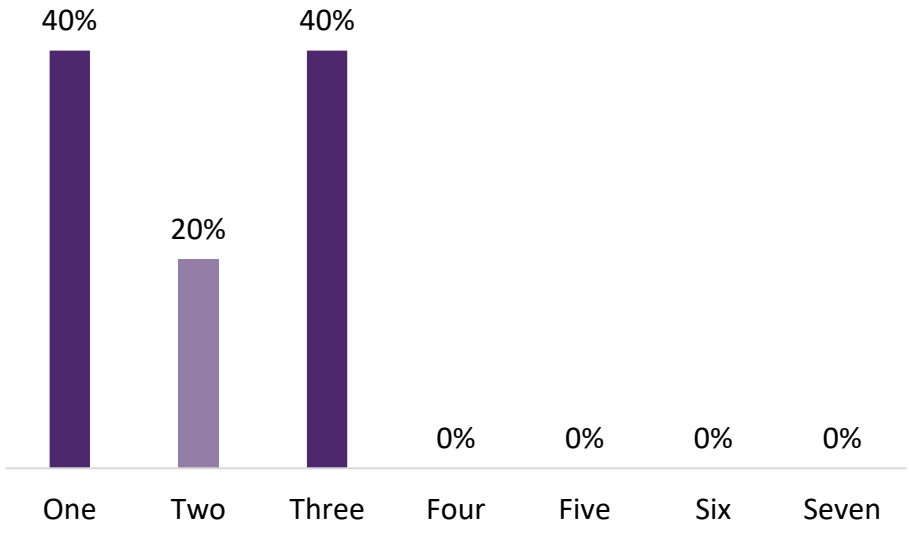


WHERE DO MARKET TRADERS LIVE



DO MARKET TRADERS HAVE OPERATE IN OTHER LOCATIONS & HOW MANY DAYS A WEEK DO THEY OPERATE





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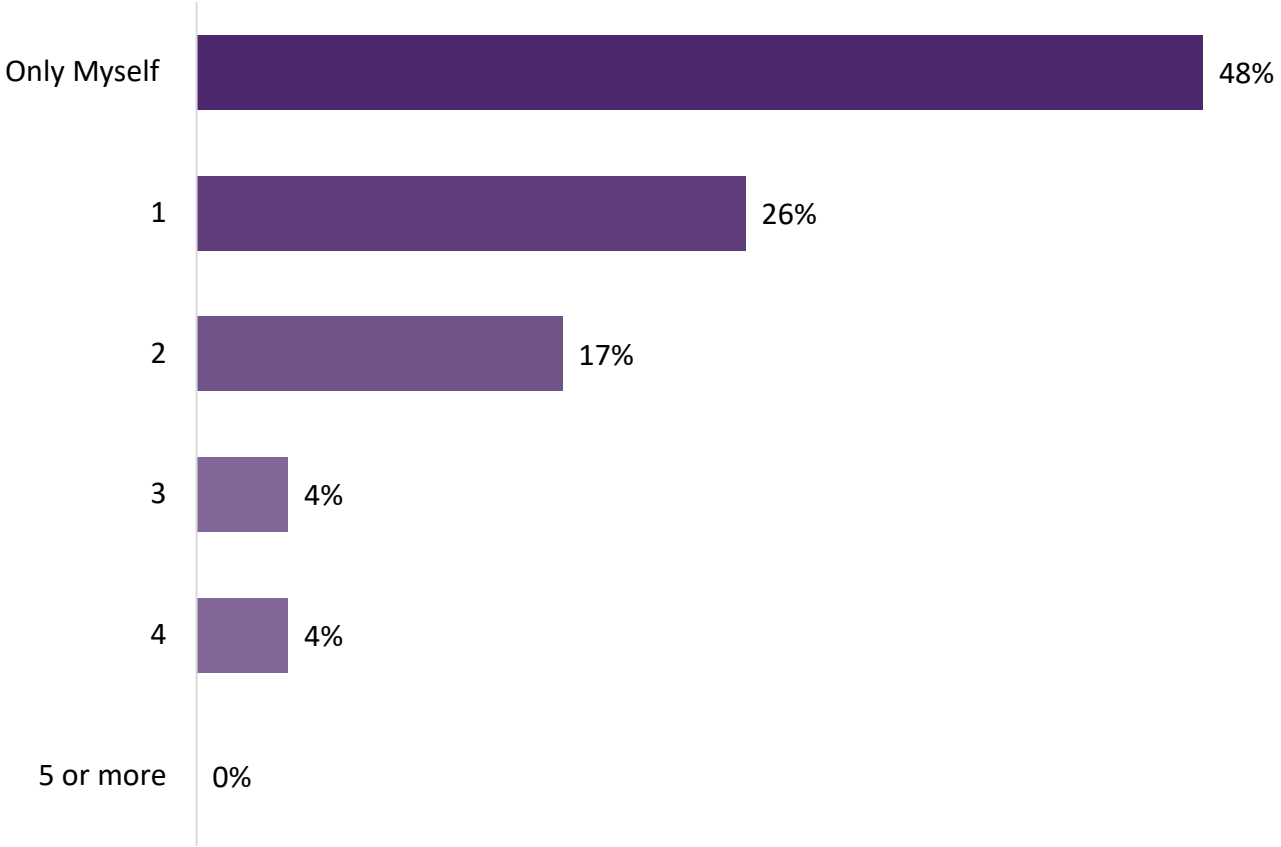
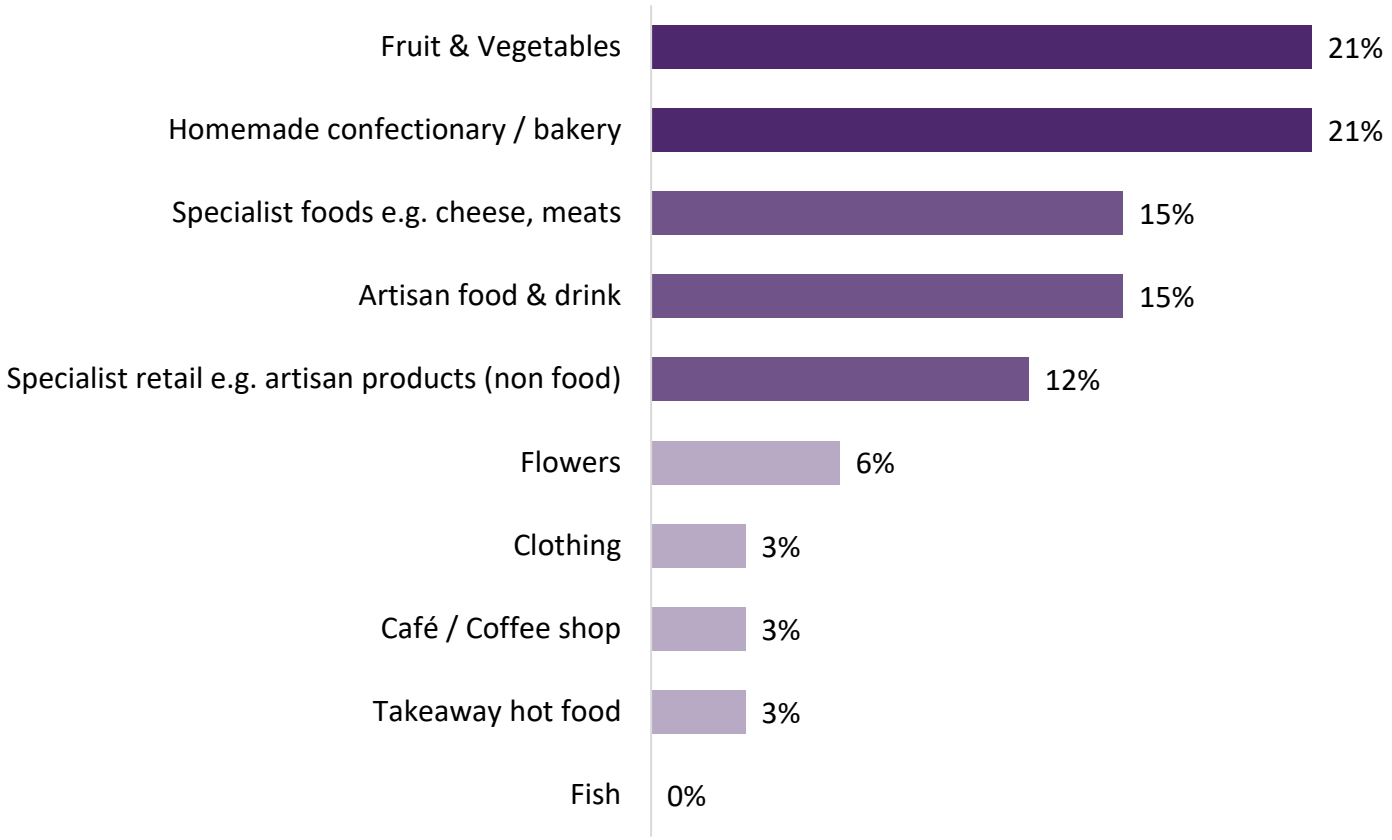
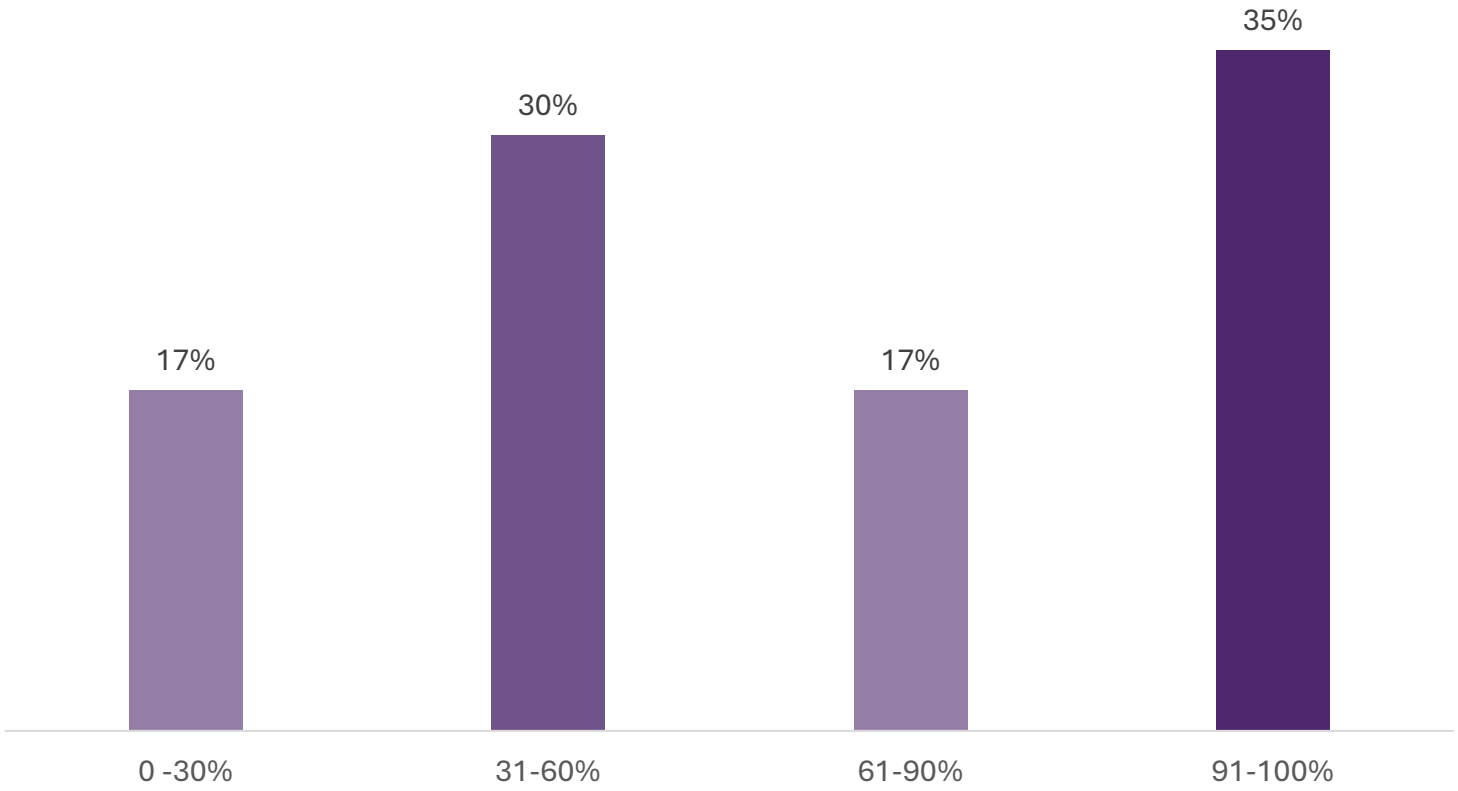
NUMBER OF STAFF EMPLOYED BY RESPONDENTS



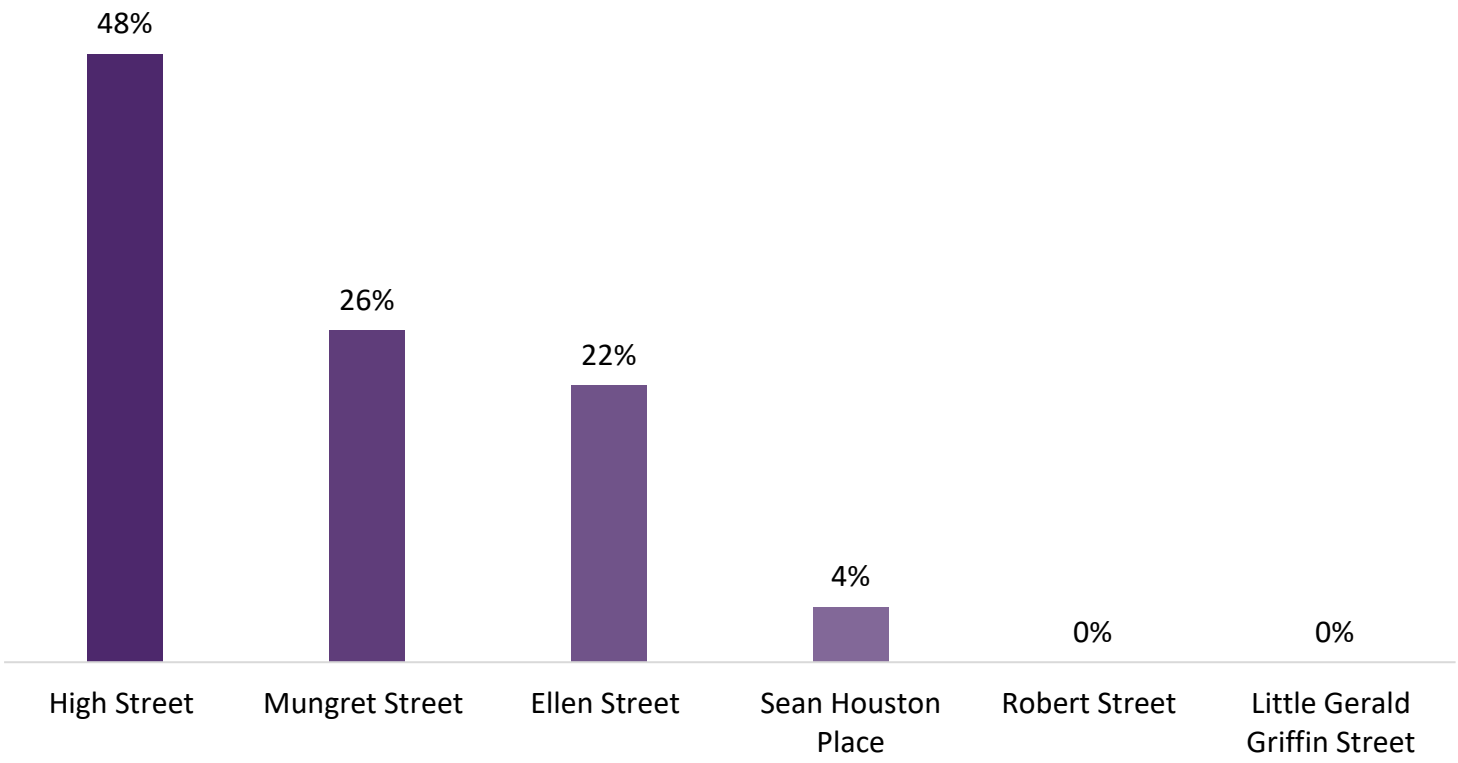
PRODUCE SOLD BY RESPONDENTS



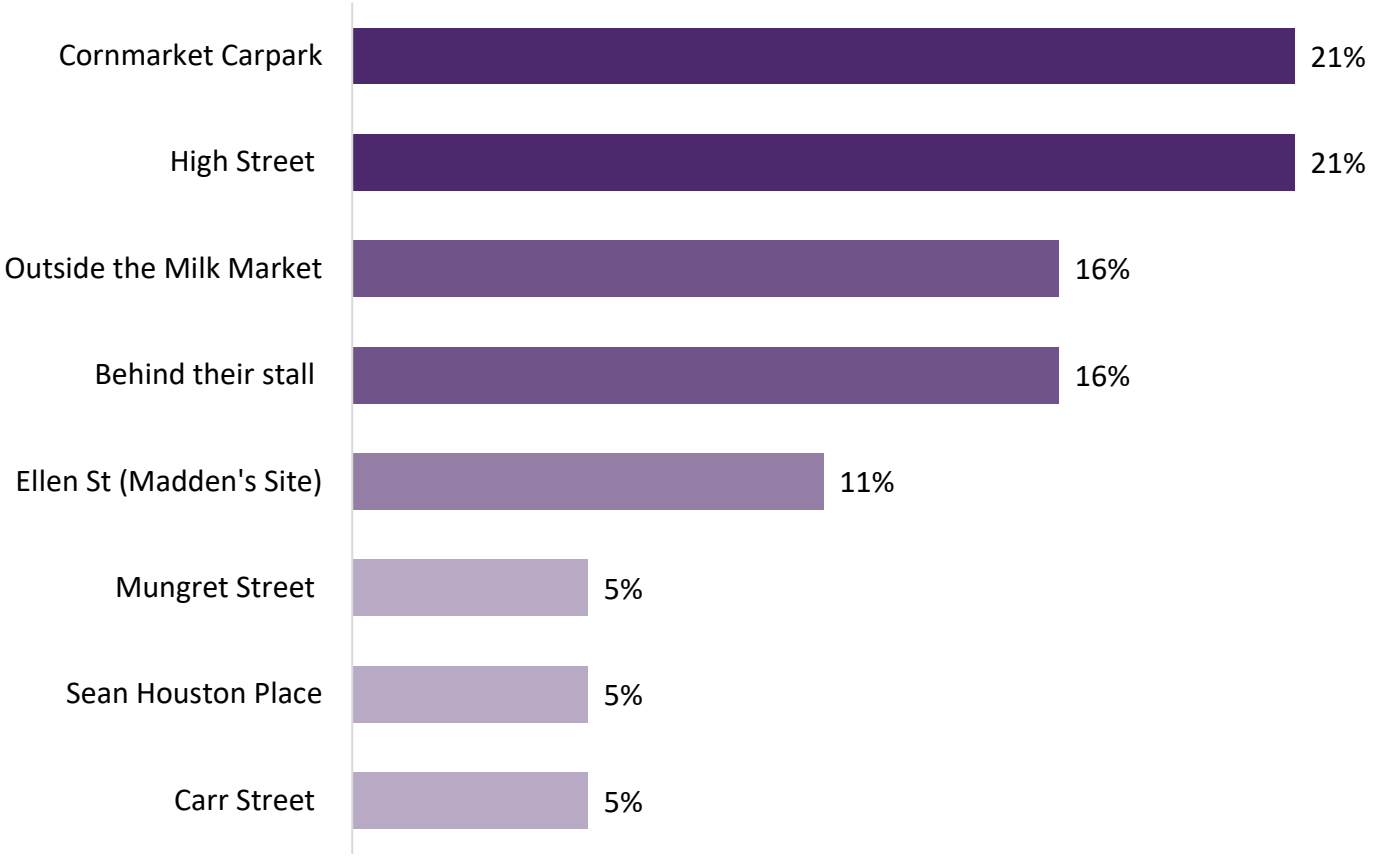
PROPORTION OF TURNOVER GENERATED AT THE MILK MARKET



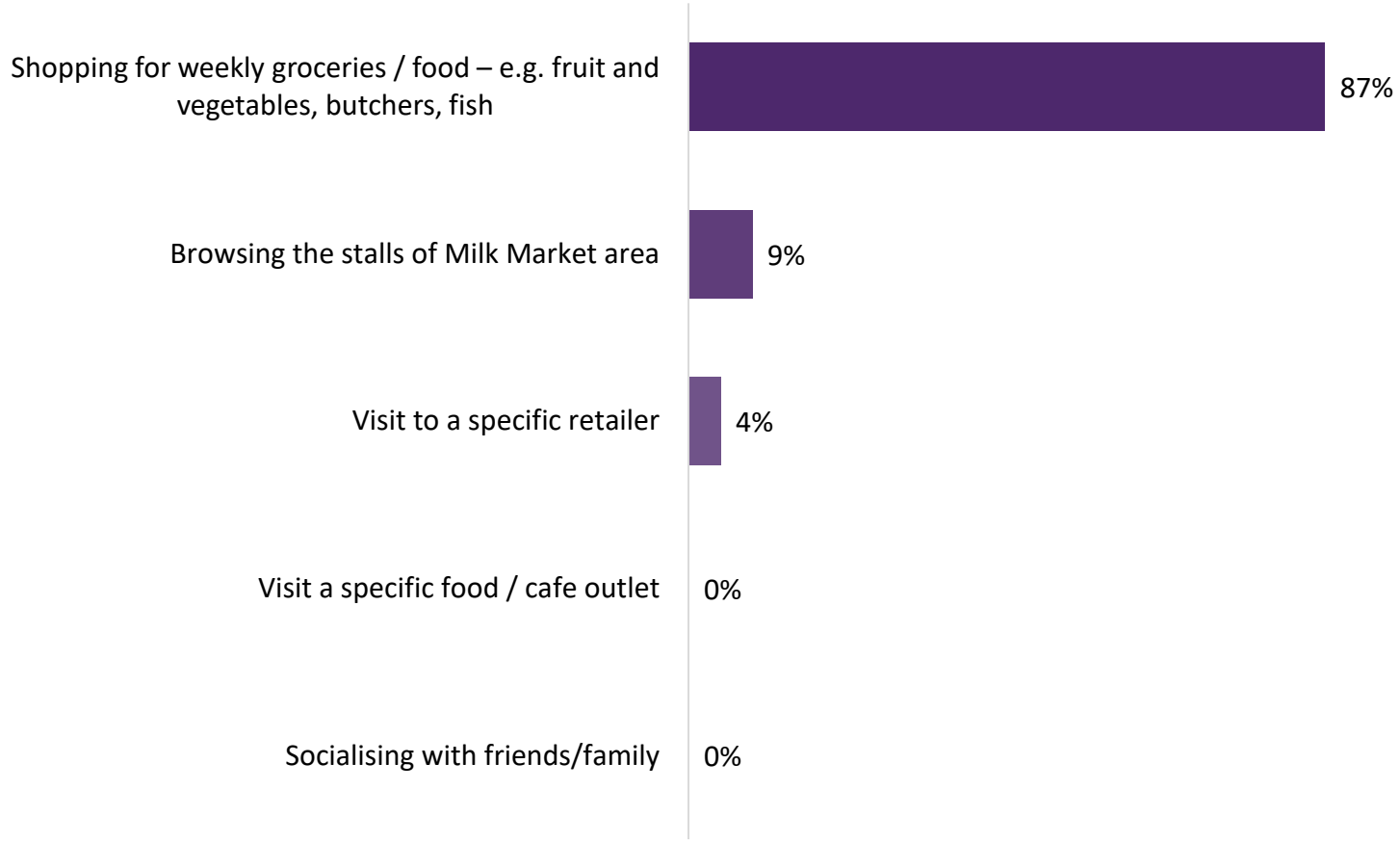
ROUTES USED TO ACCESS THE MILK MARKET



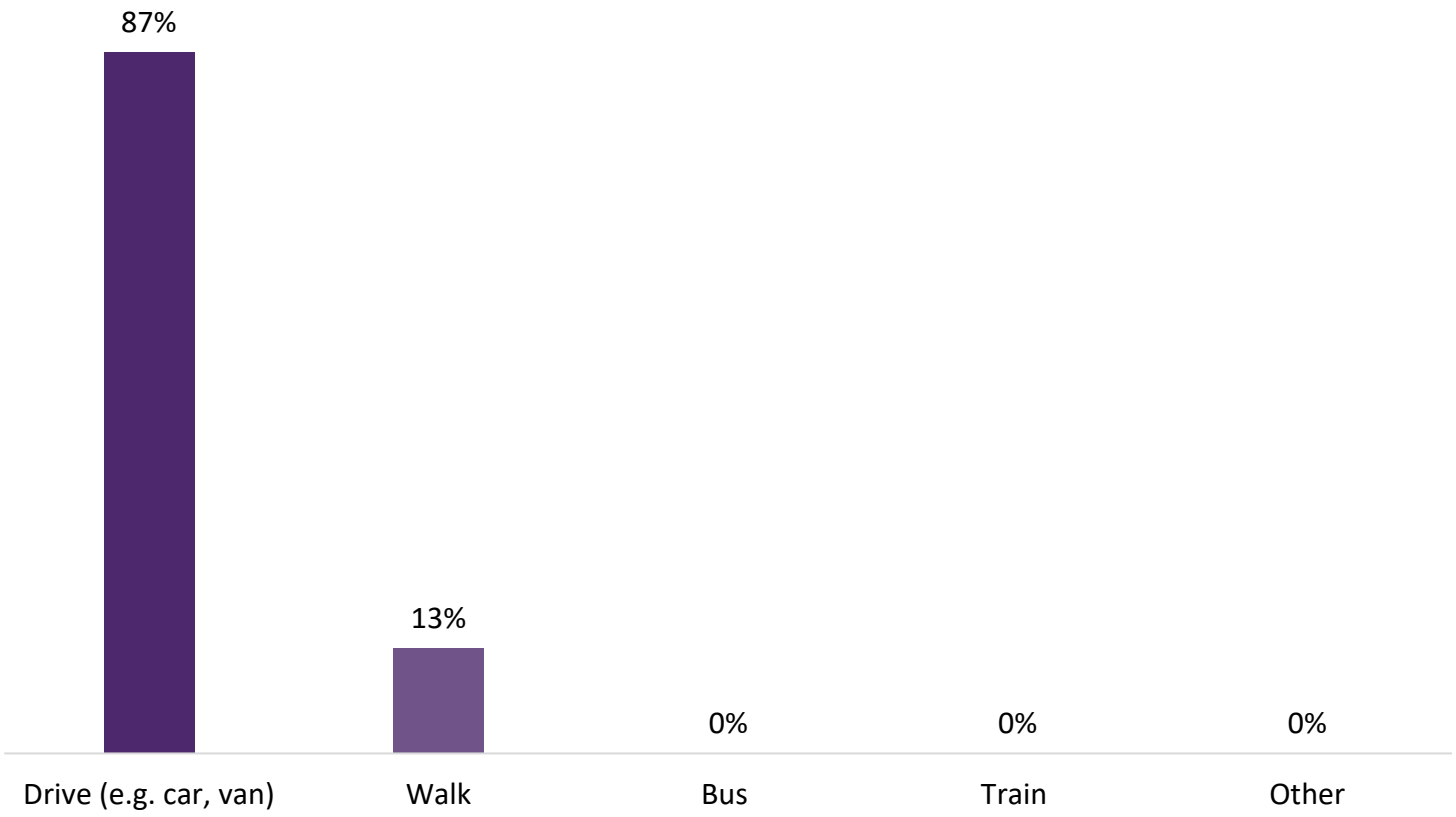
LOCATIONS USED FOR PARKING BY MARKET TRADERS



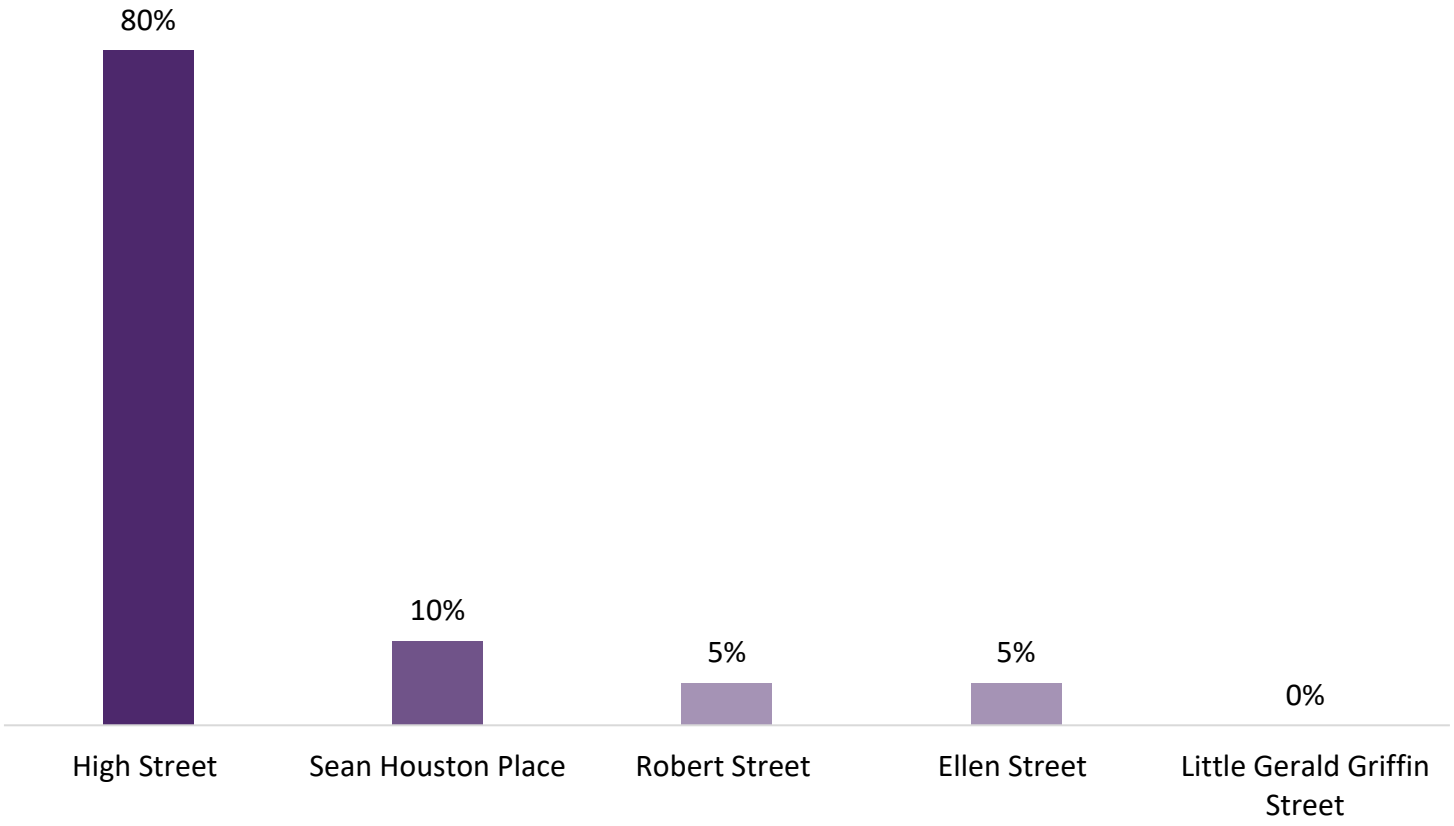
REASONS MARKET TRADERS BELIEVE PEOPLE VISIT THE MILK MARKET



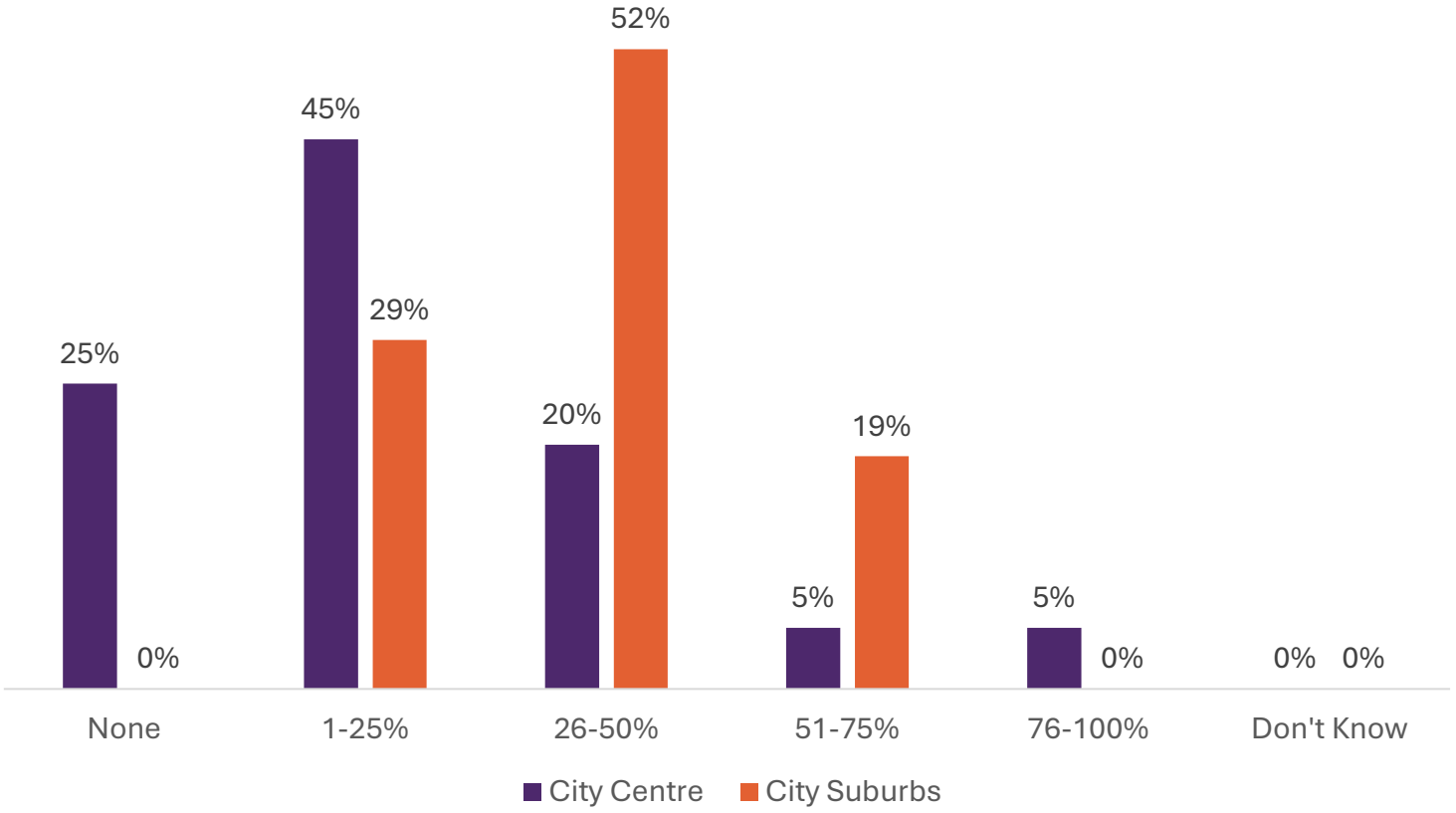
MODE OF TRANSPORT MARKET TRADERS BELIEVE CUSTOMERS USE



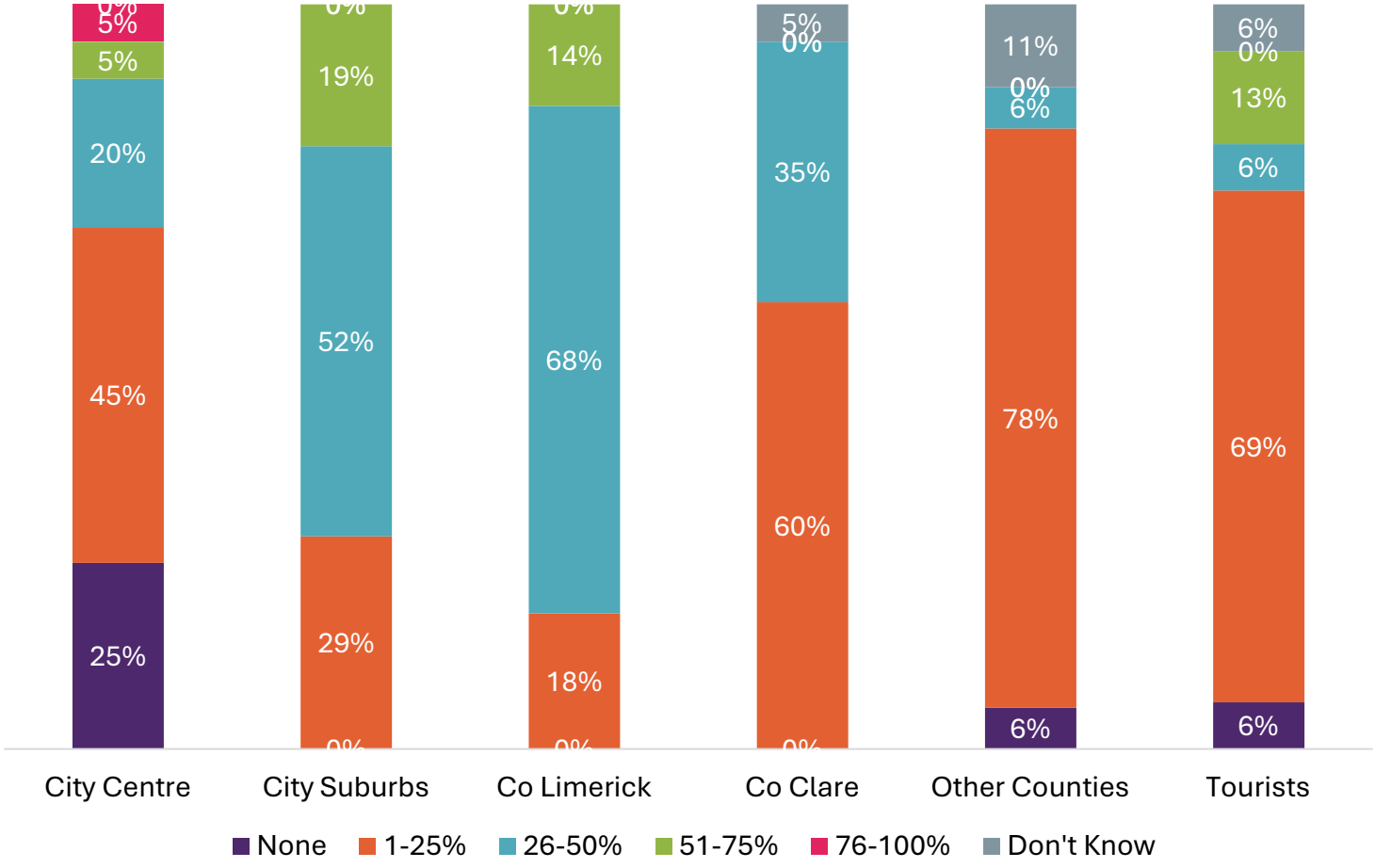
ROUTES MARKET TRADERS BELIEVE CUSTOMERS USE TO ACCESS MILK MARKET



WHERE DO MARKET TRADERS BELIEVE THEIR CUSTOMERS ARE FROM: LIMERICK CITY & SUBURBS



WHERE DO MARKET TRADERS BELIEVE THEIR CUSTOMERS ARE FROM: COUNTY LIMERICK & WIDER AREA



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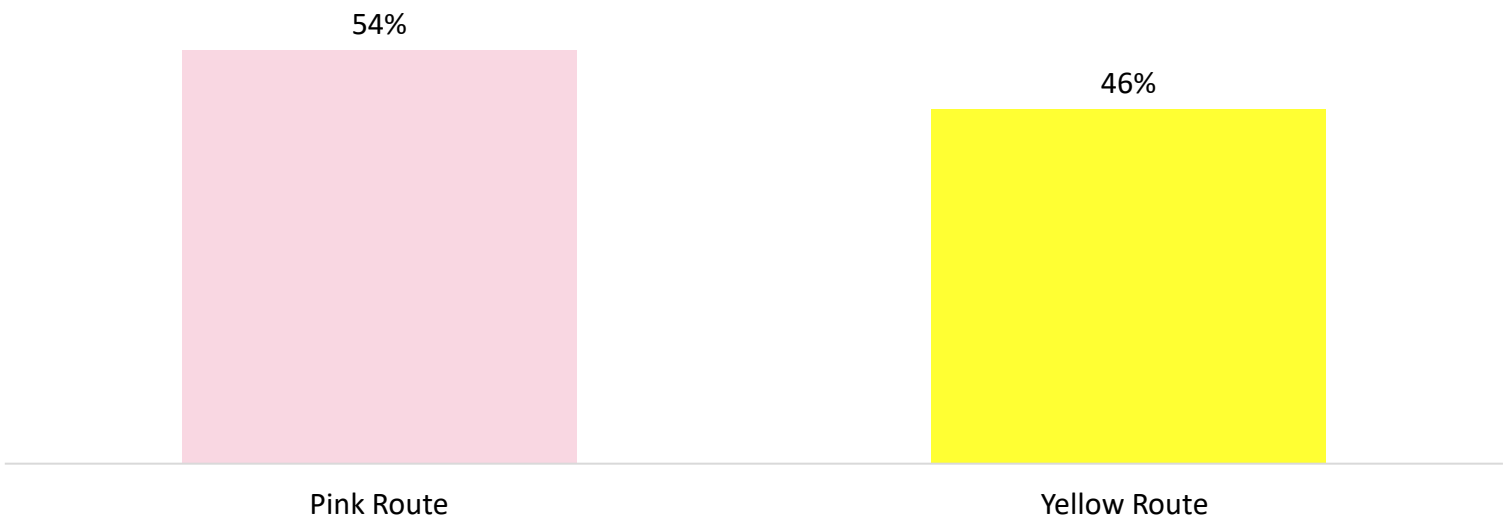
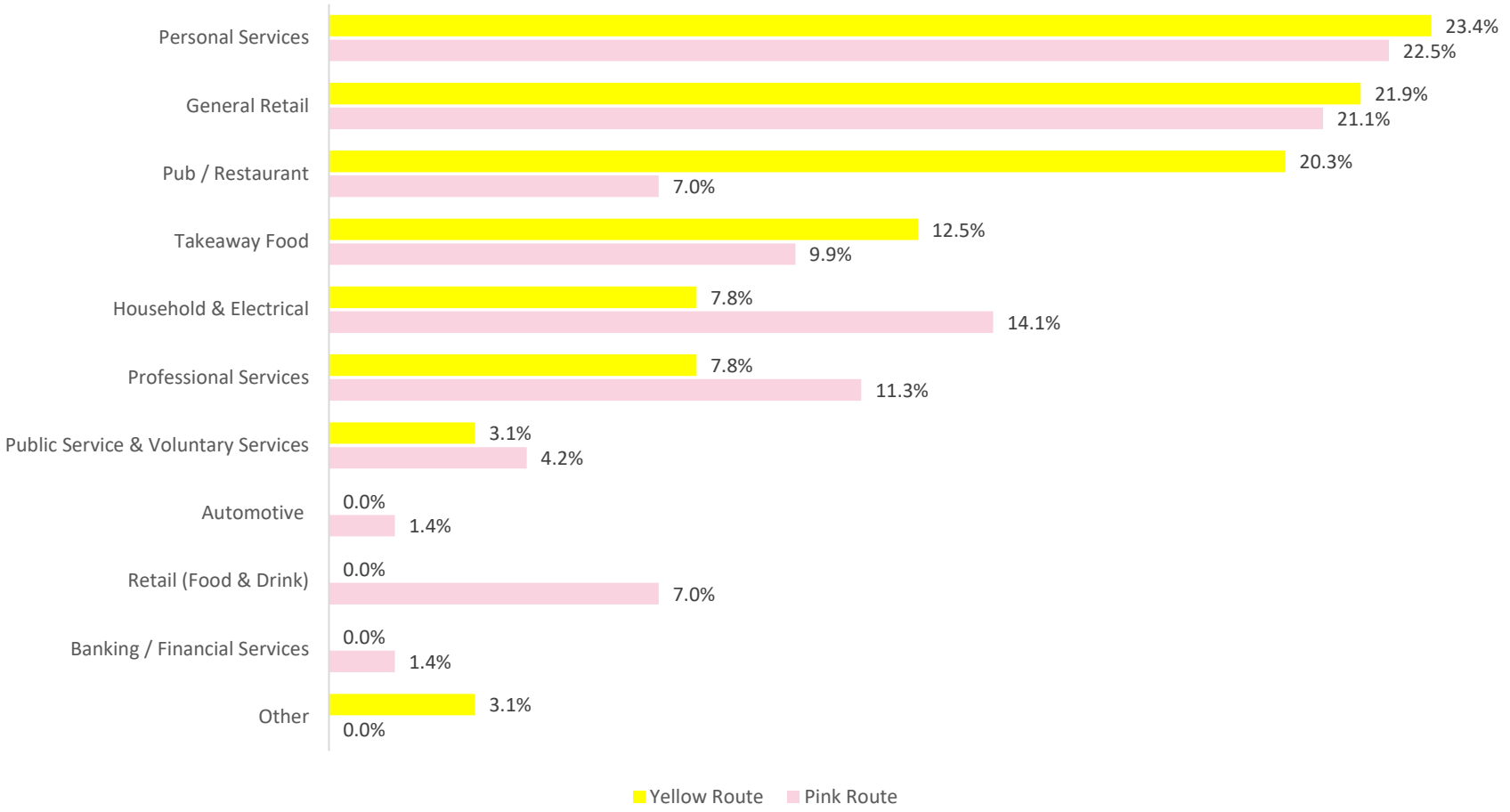
Business Survey

WHAT ROUTE ARE RESPONDENT BUSINESSES ON



RESPONDENT BUSINESS CATEGORIES ANALYSED BY ROUTE



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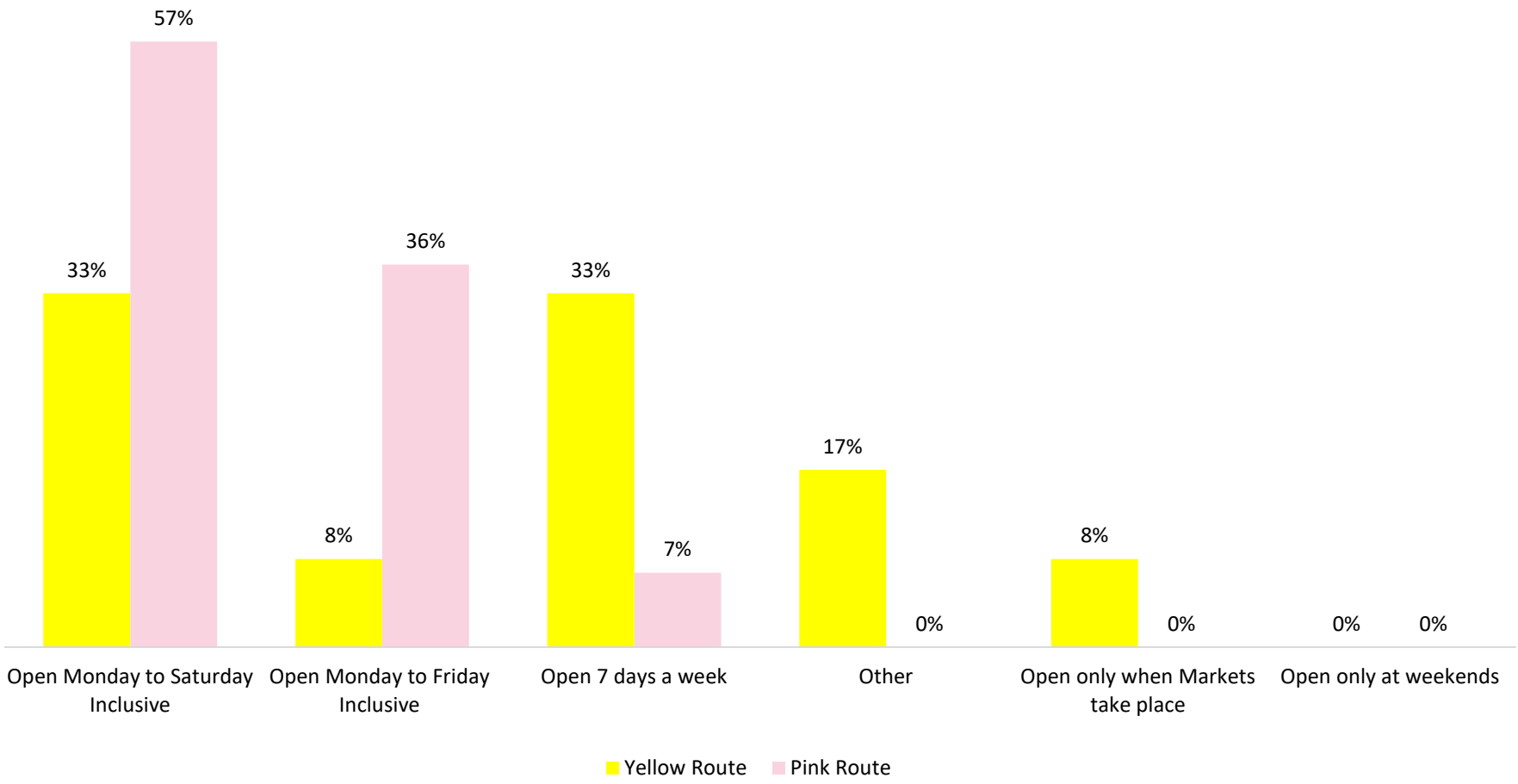
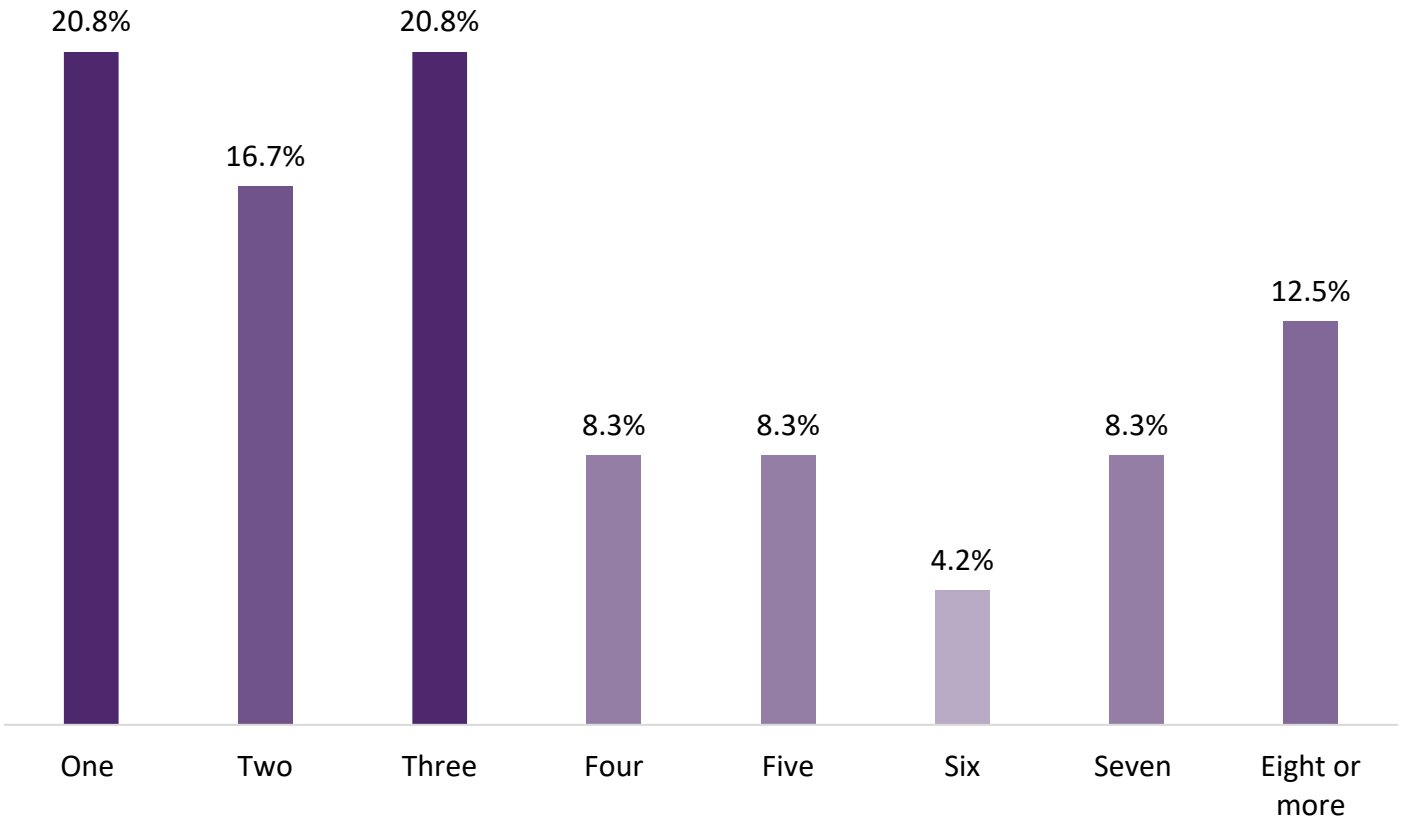
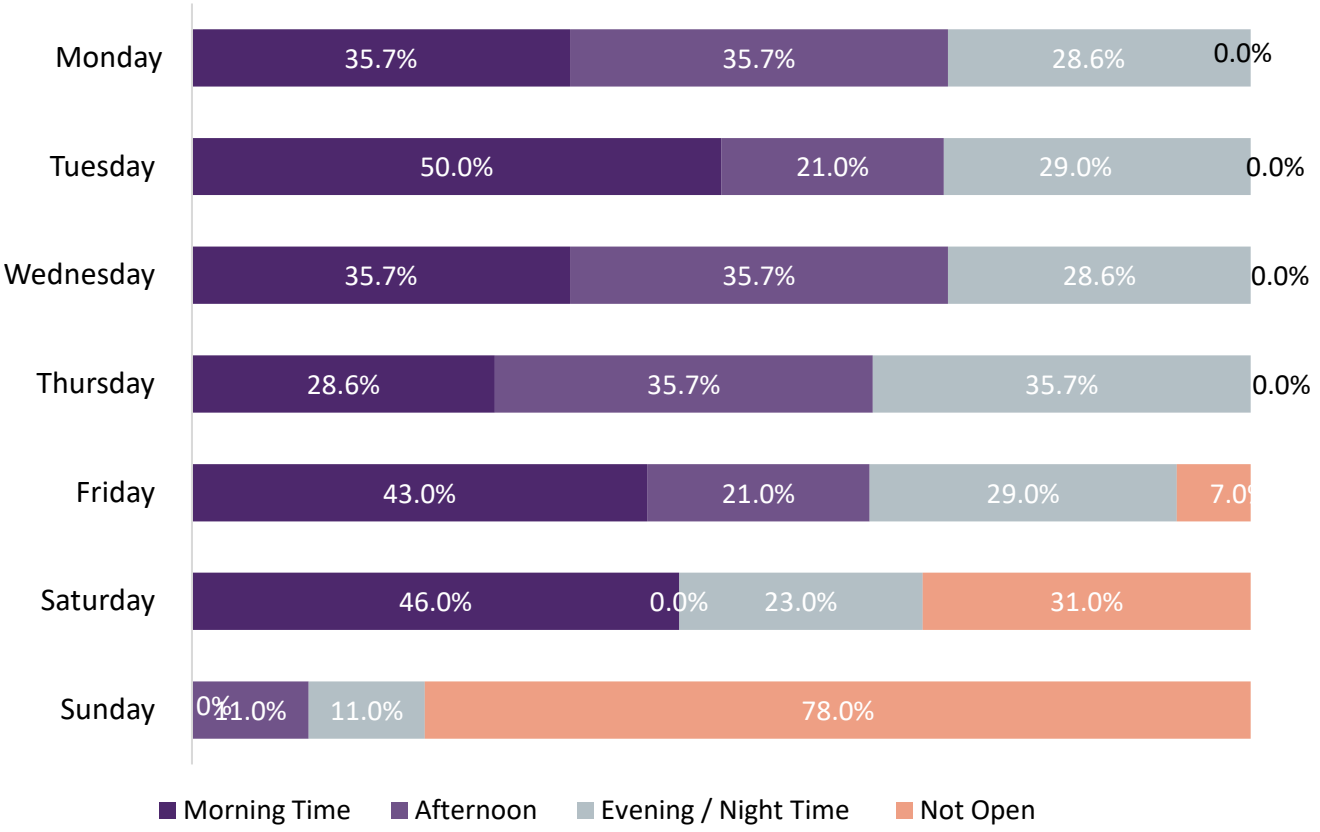
RESPONDENT BUSINESS TRADING HOURS ANALYSED BY ROUTE



NUMBER OF STAFF EMPLOYED BY RESPONDENT BUSINESSES



BUSIEST PERIODS FOR BUSINESSES ON PINK ROUTE



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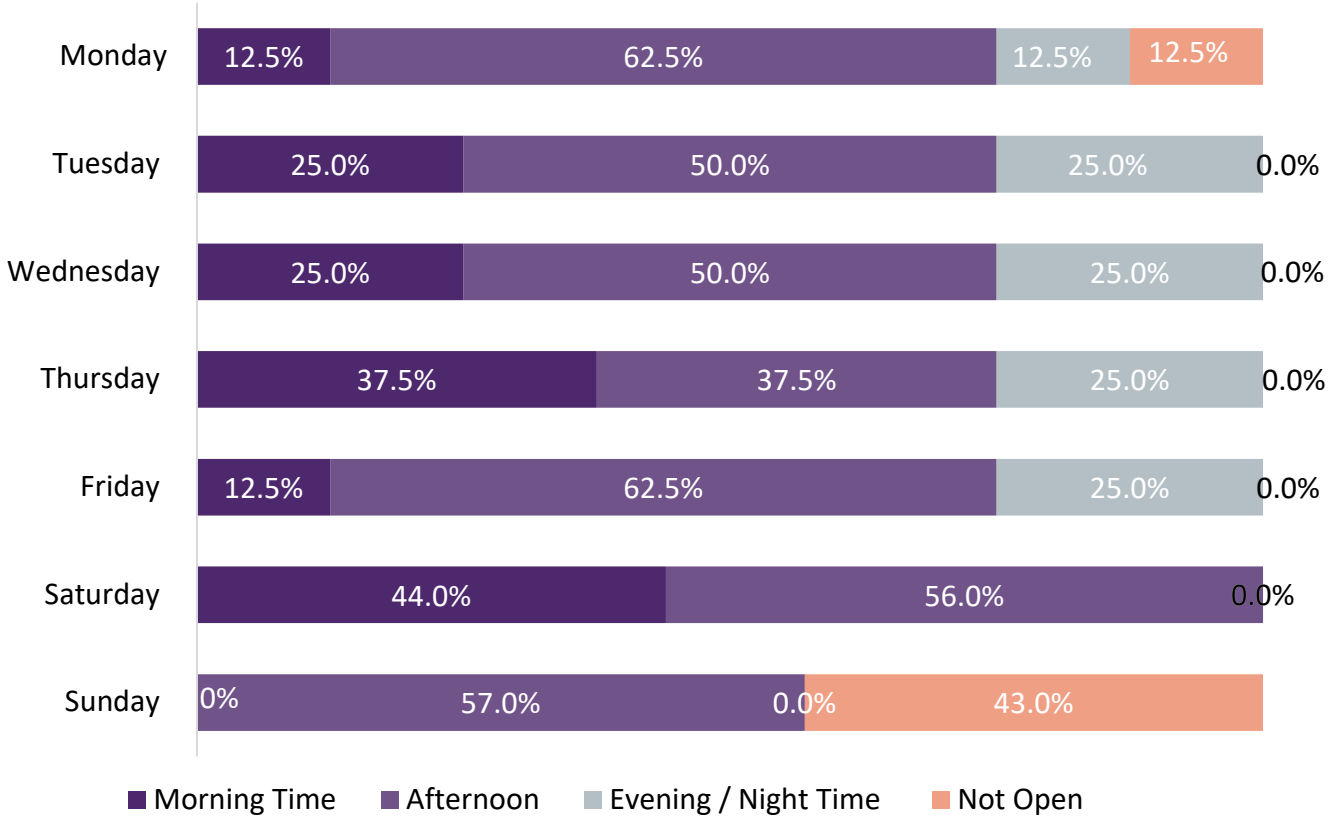
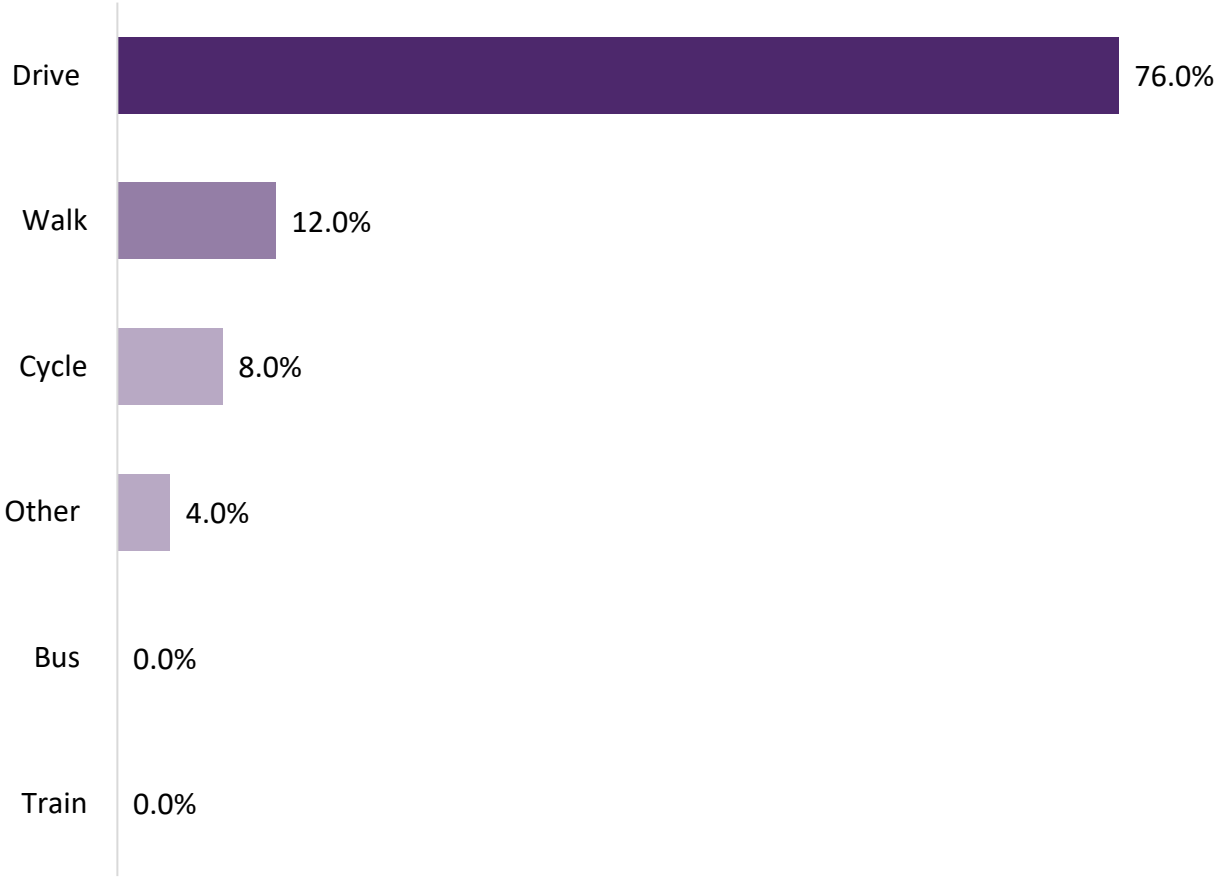
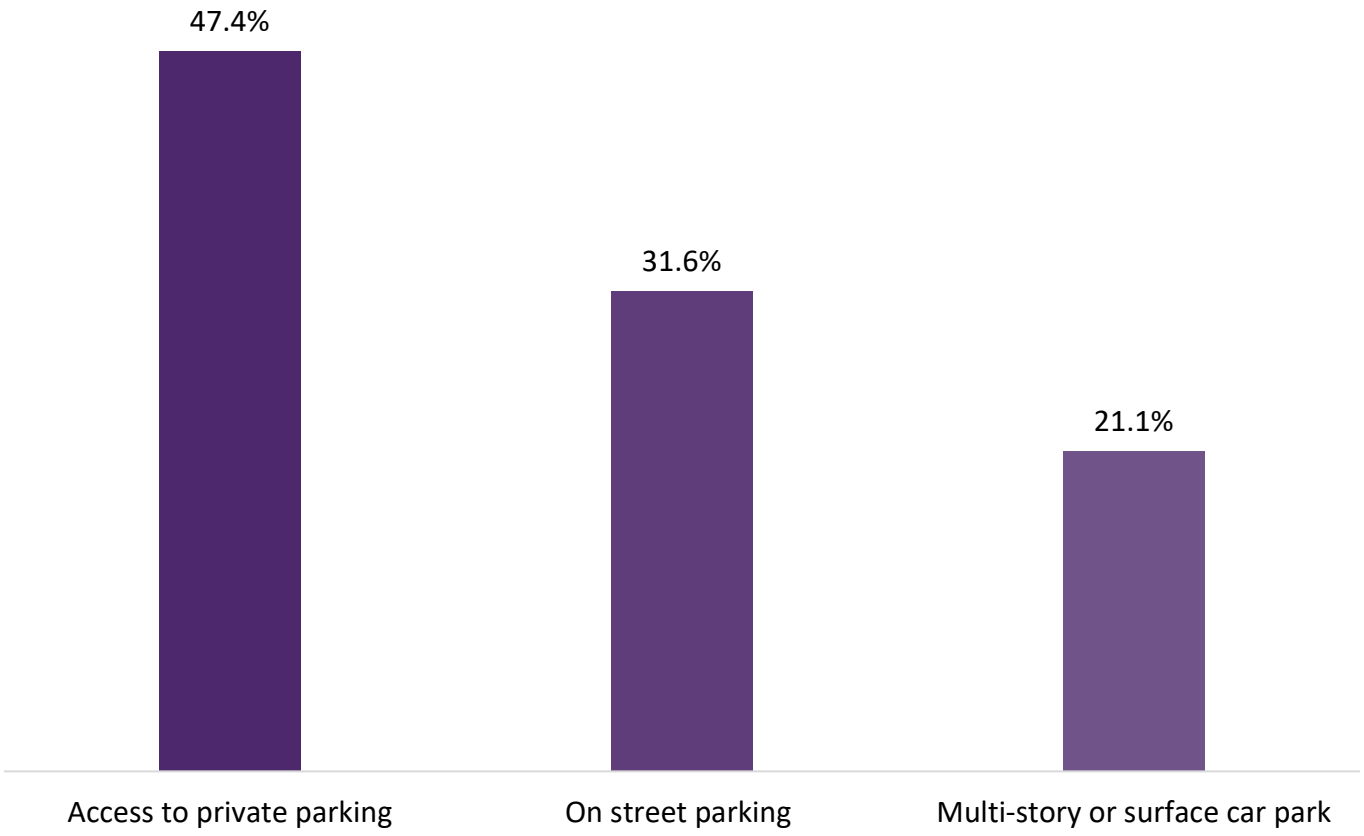
BUSIEST PERIODS FOR BUSINESSES ON YELLOW ROUTE



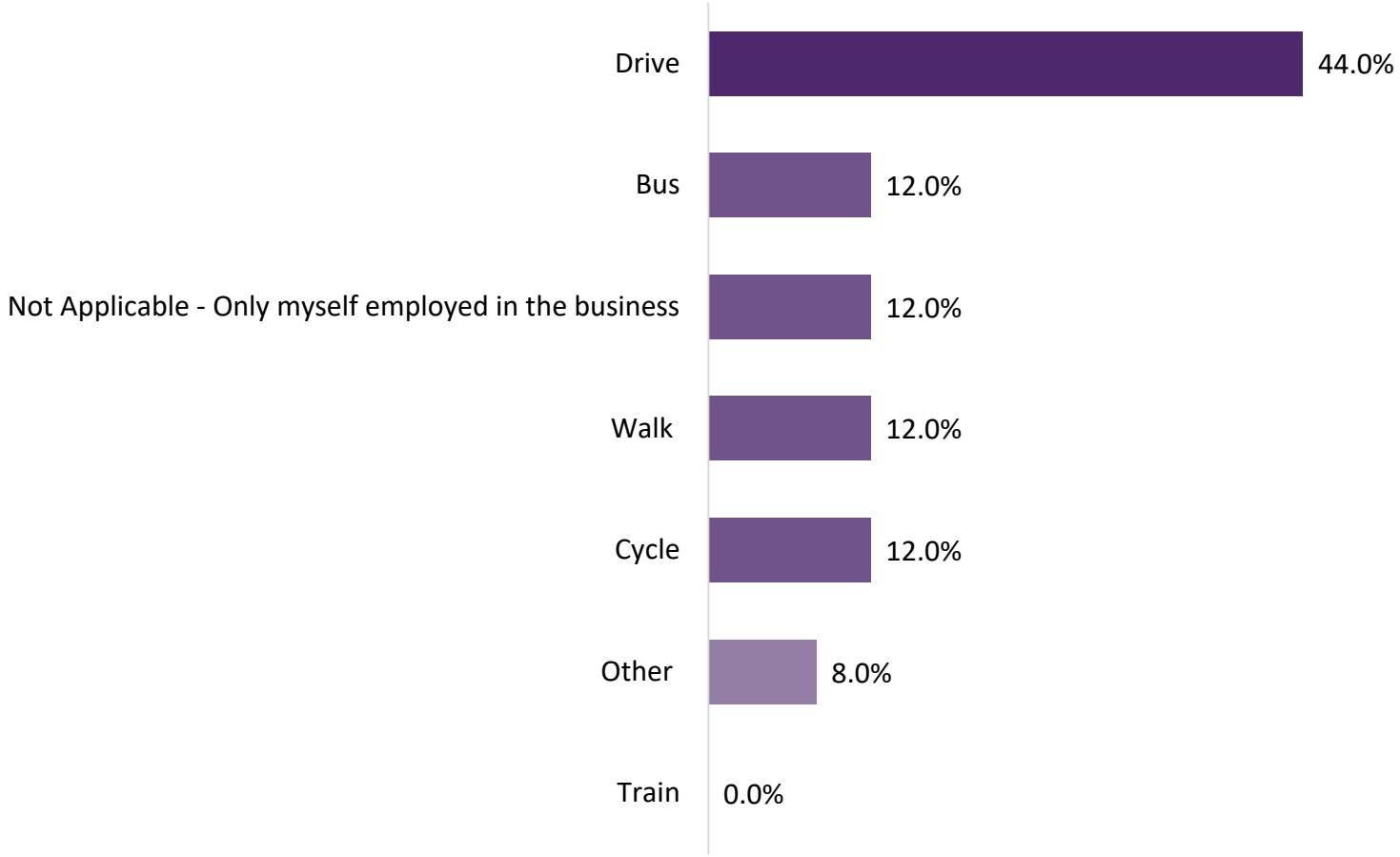
HOW BUSINESS OWNERS TRAVEL TO WORK



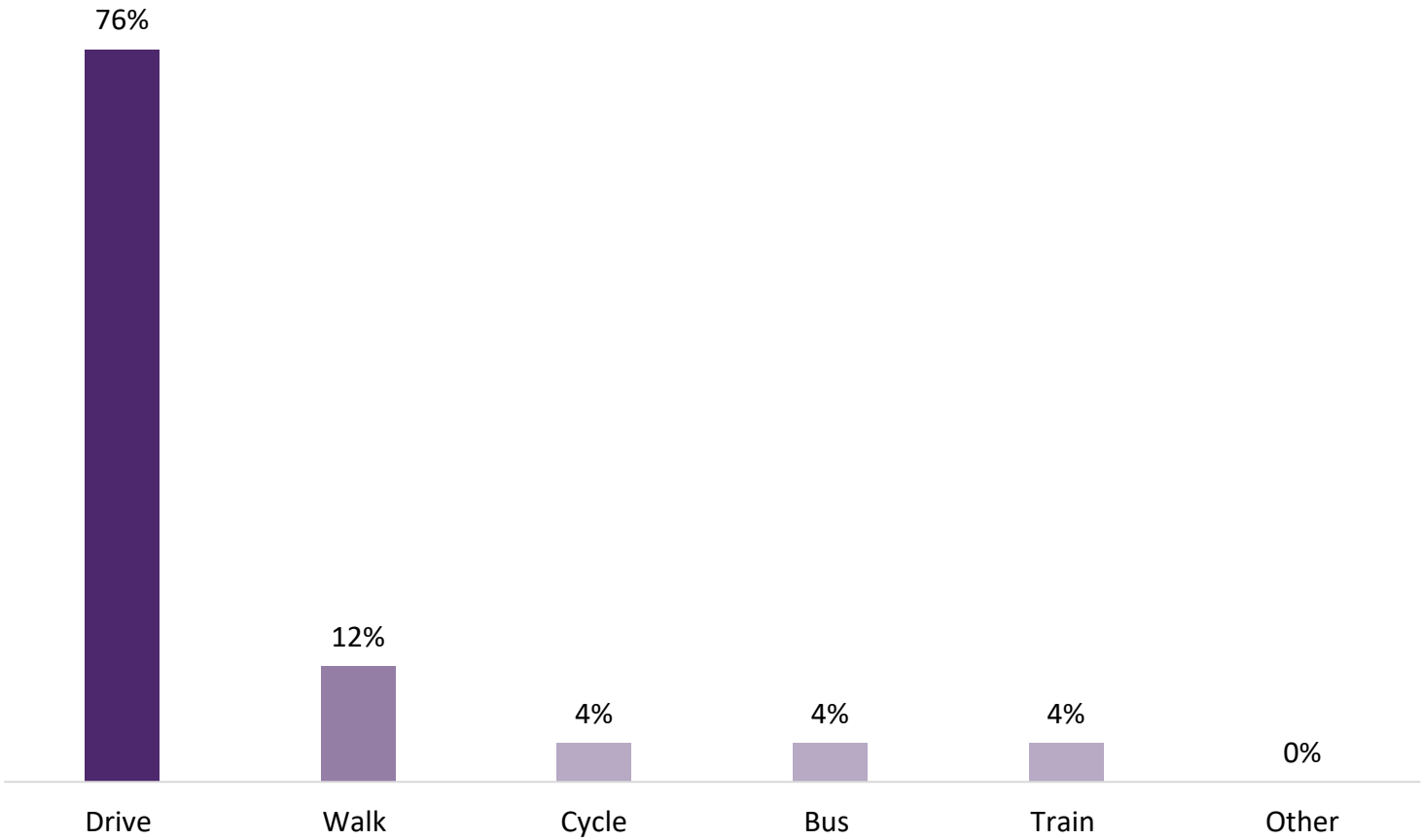
WHERE BUSINESS OWNERS PARK WHILE AT WORK



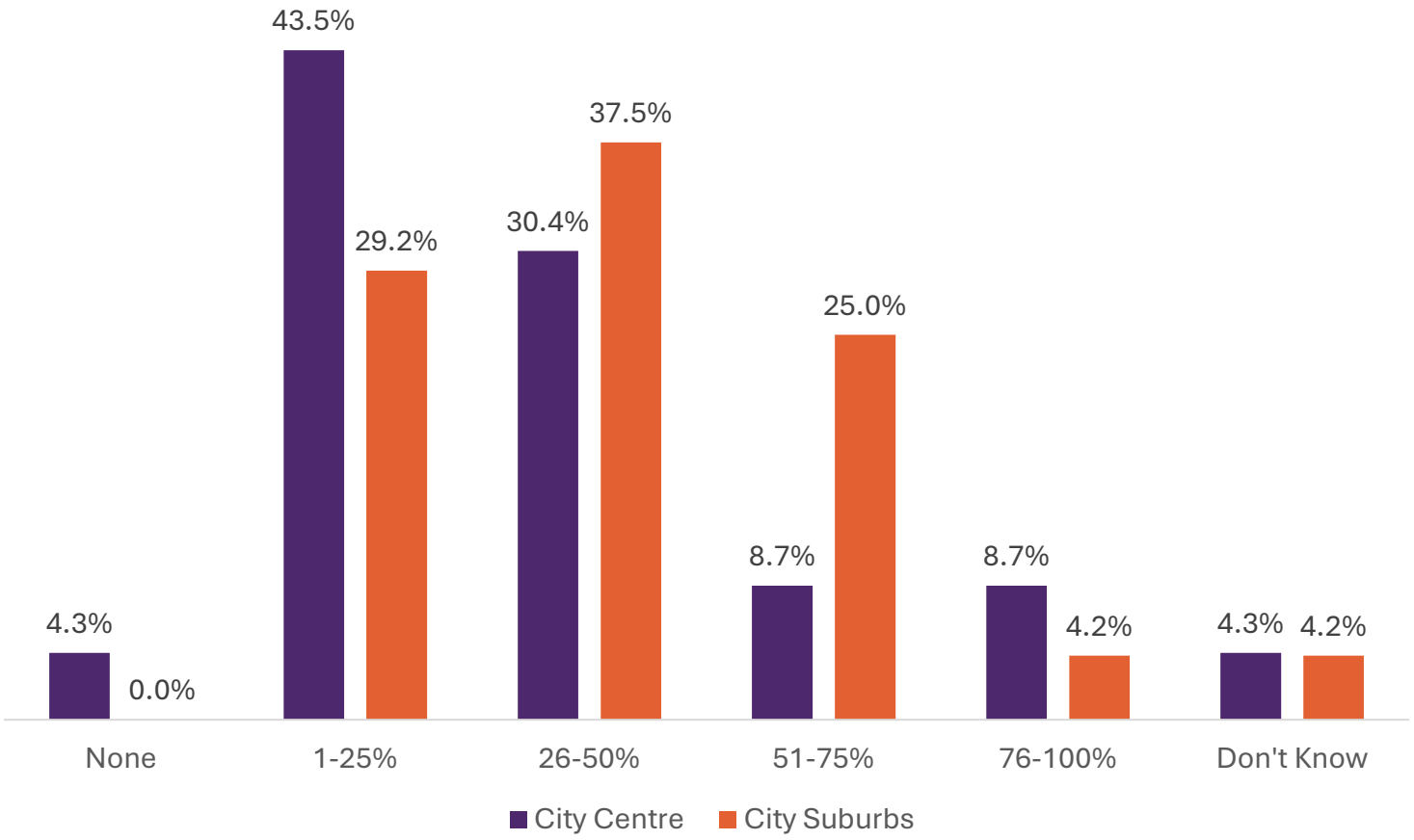
MODE OF TRANSPORT USED BY STAFF TO GET TO WORK



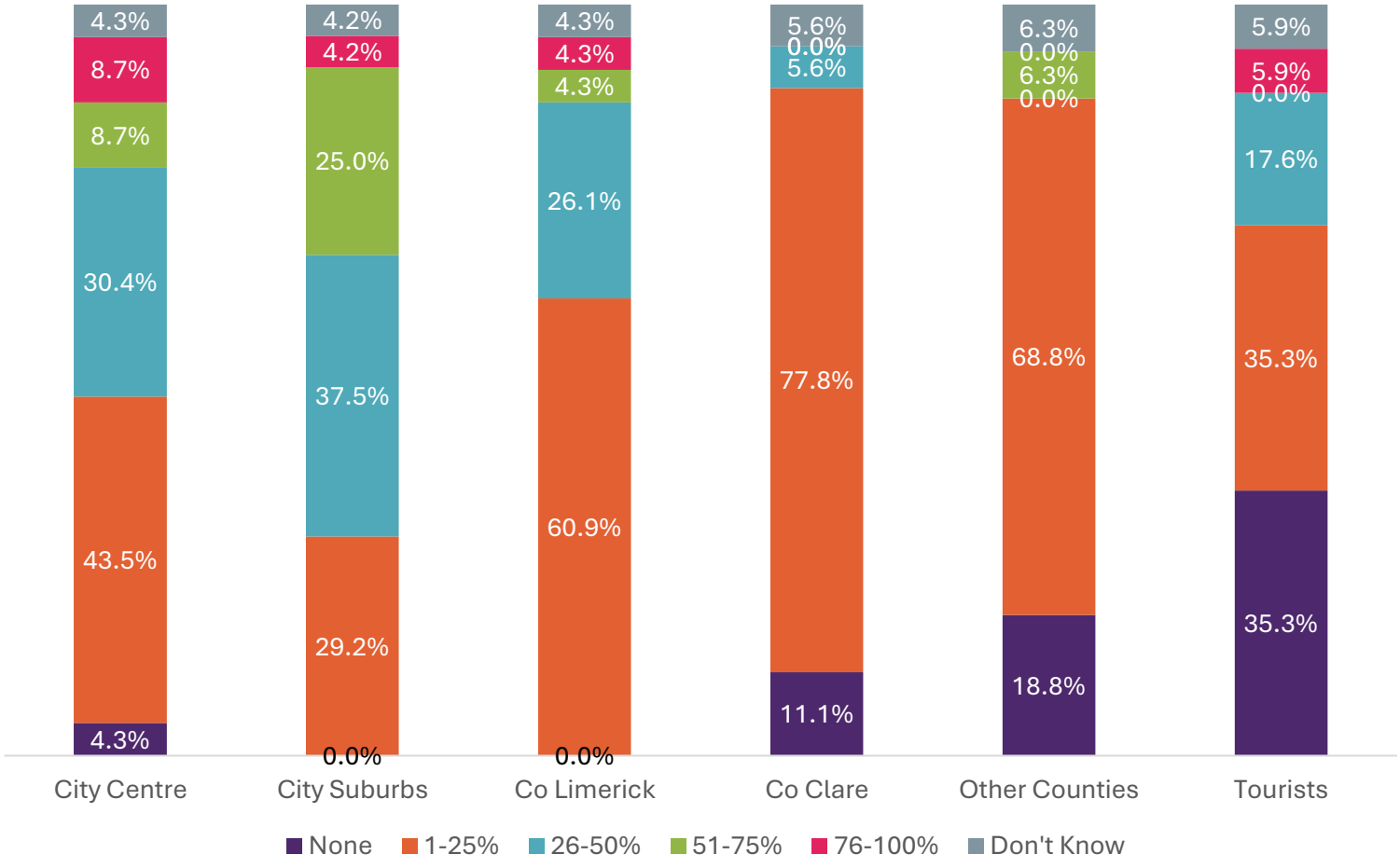
MODE OF TRANSPORT BUSINESSES BELIEVE CUSTOMERS USE



WHERE BUSINESSES THINK THEIR CUSTOMERS ARE FROM – LIMERICK CITY/COUNTY



WHERE BUSINESSES THINK THEIR CUSTOMERS ARE FROM: LIMERICK COUNTY AND WIDER AREAS



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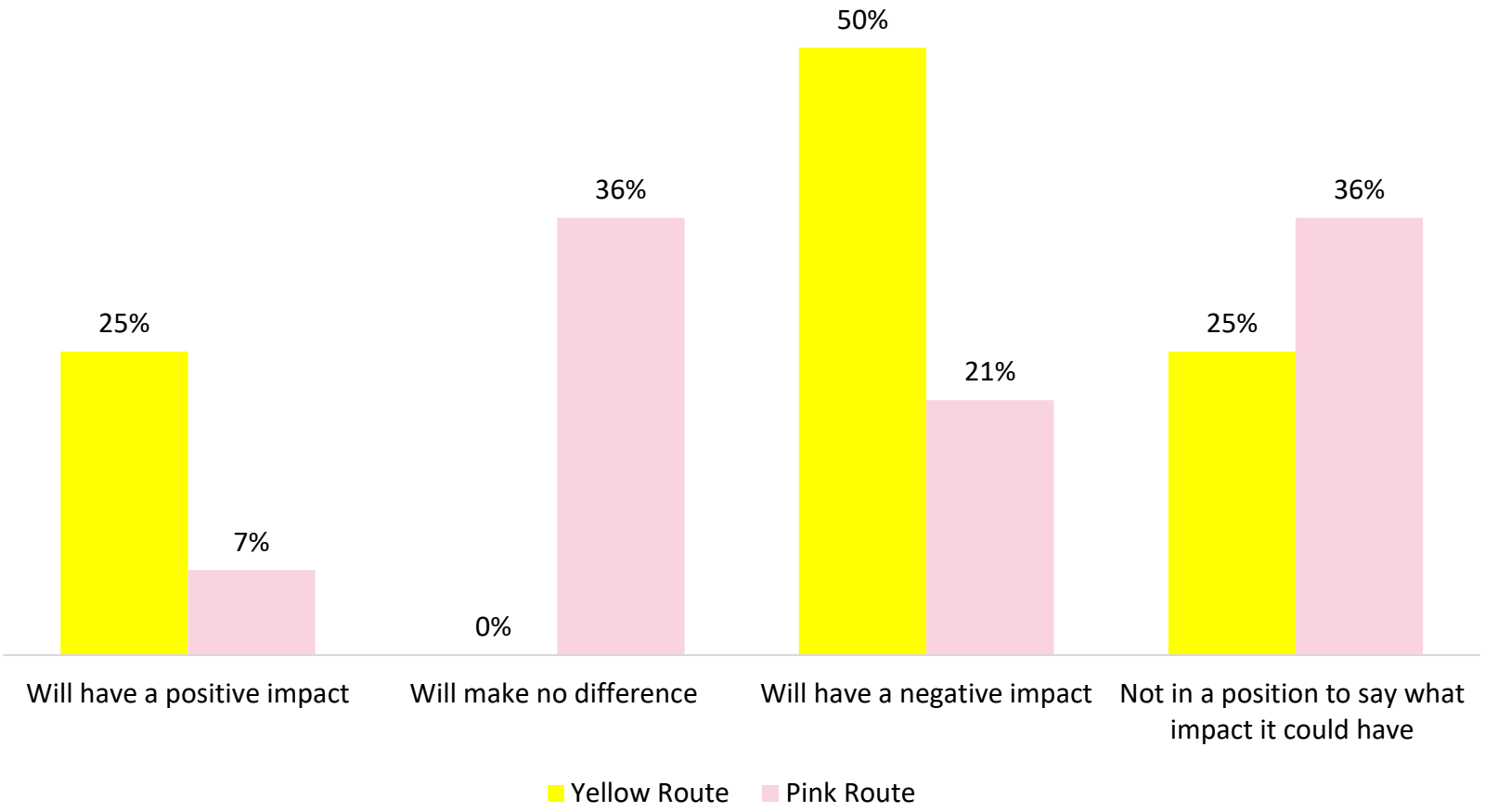
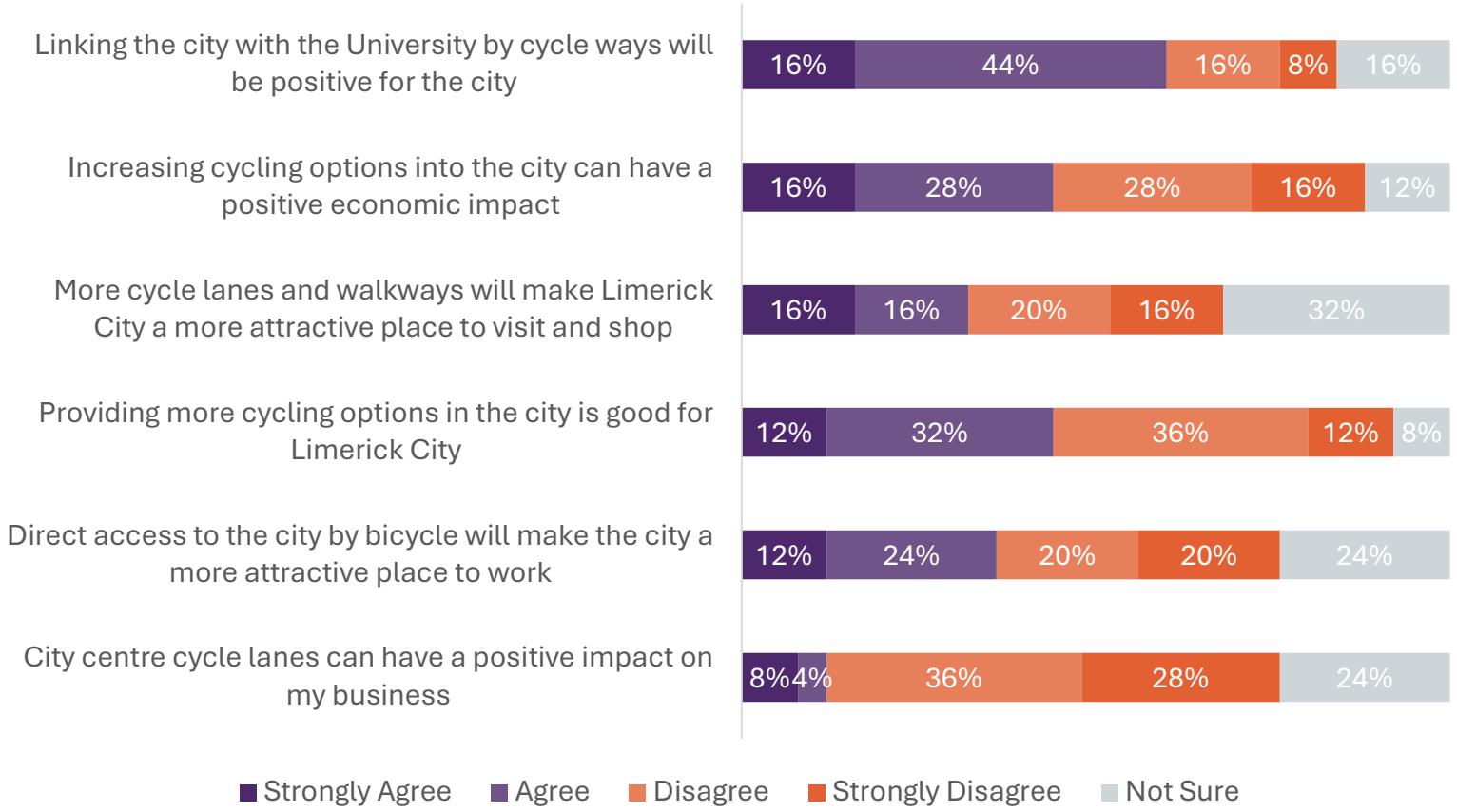
PERCEIVED ECONOMIC IMPACT ON BUSINESS – ANALYSED BY ROUTE

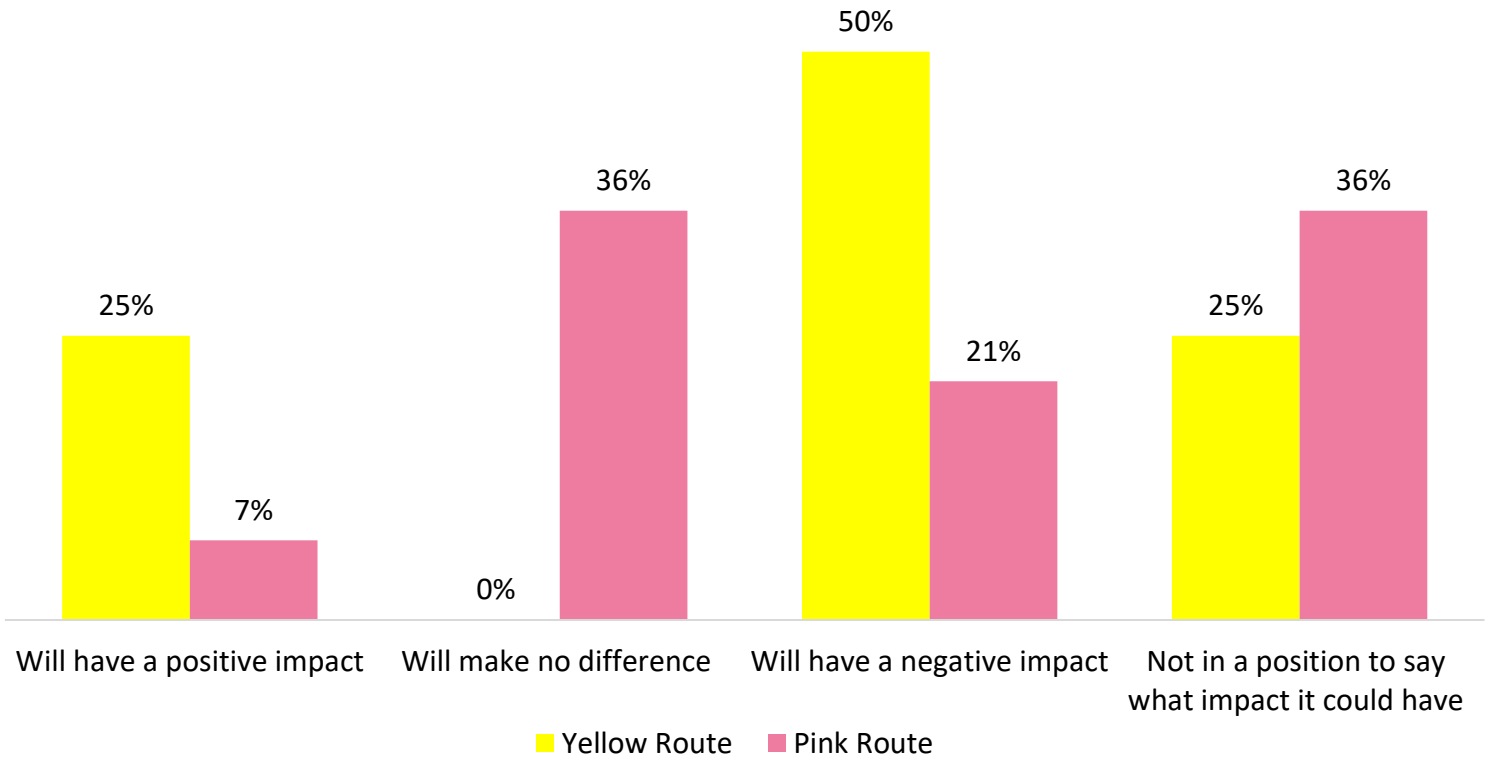


BUSINESS ATTITUDES TO ACTIVE TRAVEL



REPUCON CONSULTING

BUSINESS ATTITUDES TO ACTIVE TRAVEL – LONG TERM IMPACT OF A CYCLE LANE CLOSE TO THEIR BUSINESS – ANALYSED BY YELLOW & PINK ROUTE



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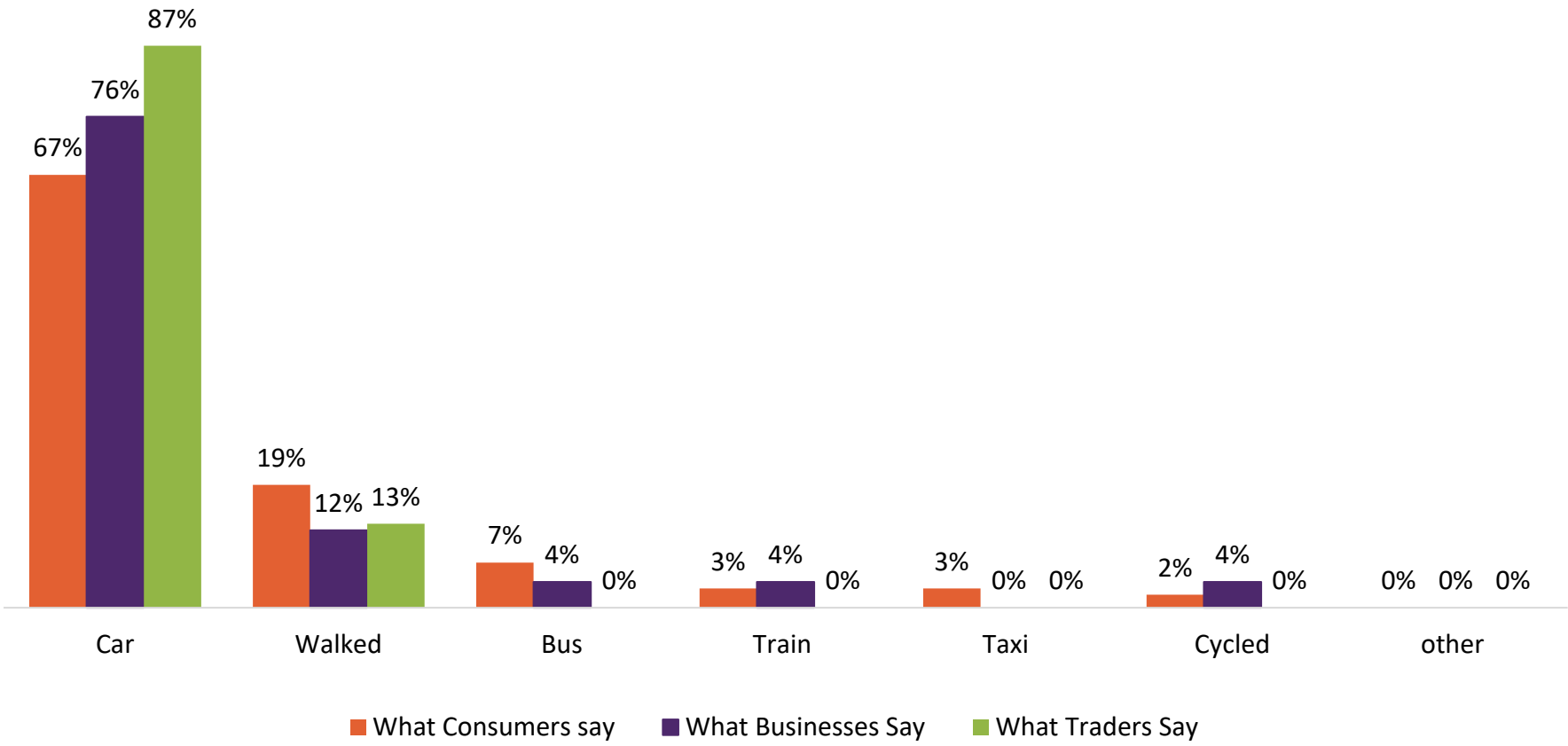
Comparisons

CONSUMER MODES OF TRANSPORT vs BUSINESS & MARKET TRADER OPINION



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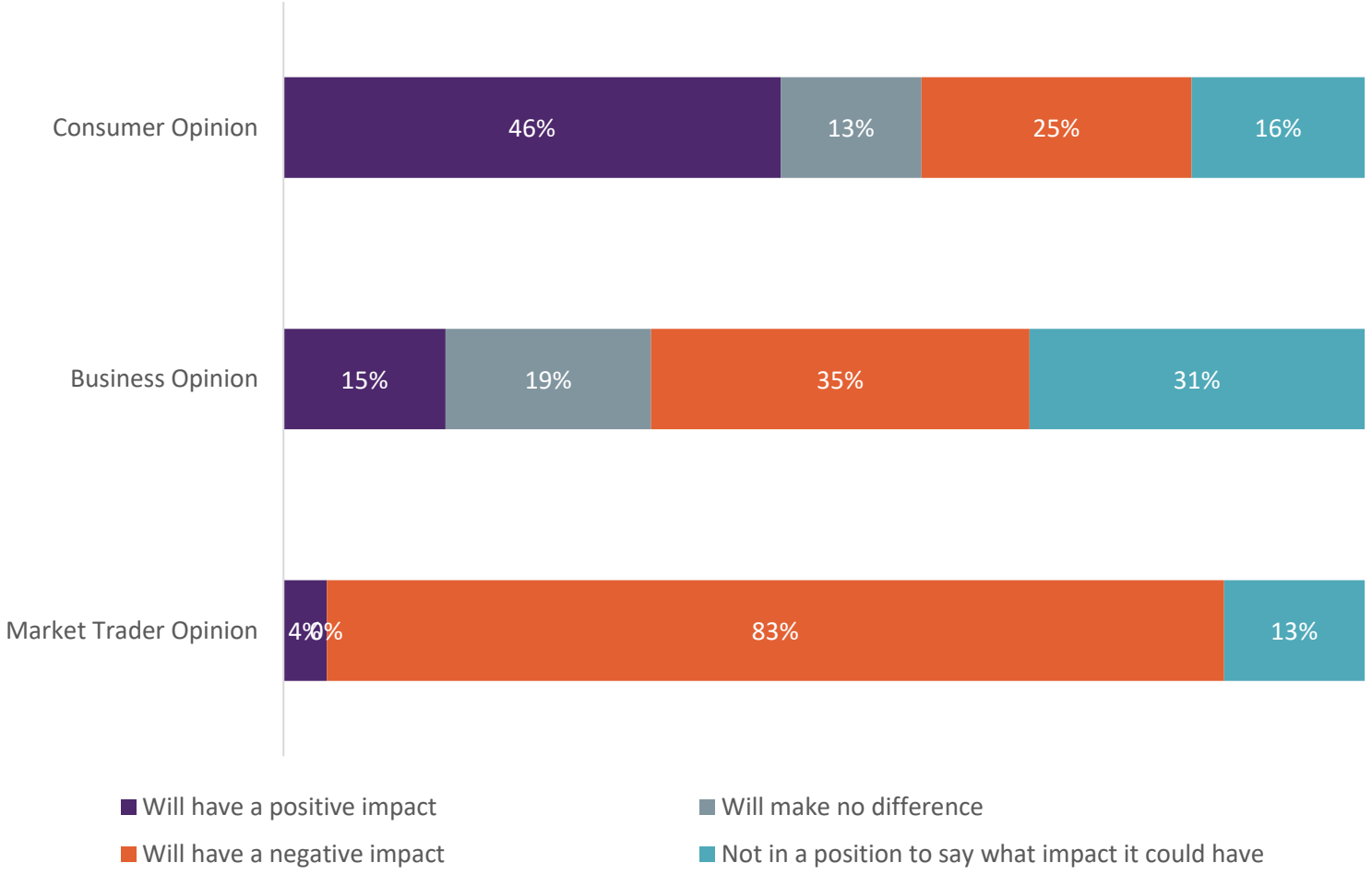
ATTITUDE TO POSSIBLE ECONOMIC IMPACT

ATTITUDES TO POTENTIAL ECONOMIC IMPACT OF INCREASED CYCLING FACILITIES AND PEDESTRIAN ACCESS



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