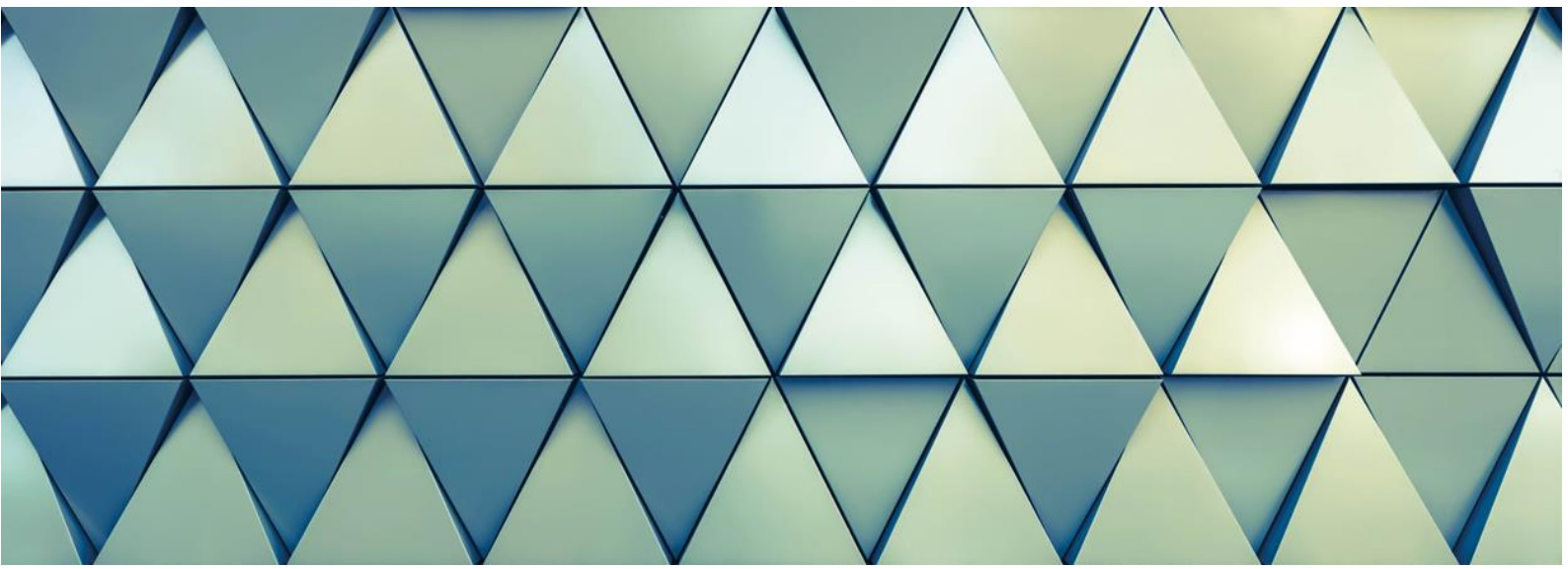


Causeway Coast & Glens

Retail Capacity Assessment – Update 2020

On behalf of Causeway Coast & Glens Borough Council

August 2020



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A – Updated Statistical Assessment

1.0 Introduction

Background

- 1.1 Nexus Planning completed a 'Retail and Commercial Leisure Capacity Assessment' on behalf of Causeway Coast & Glens Borough Council in October 2017.
- 1.2 The Council now seeks an update to the retail aspects of that Study in order to account for the passing of time. Specifically, the Council wishes the evidence base to be updated to reflect the latest macro-economic data available on the matters of retail growth and internet spend which, as we go on to explain, have changed significantly in the past 3 years. In addition, since the time of our original commission, the Council has also extended the timeframe for completion of its Local Development Plan from 2030 to 2035. Our work also therefore considers capacity over this extended period.
- 1.3 Importantly, this report should be read alongside the original study dated October 2017. Our commission is not to replicate that study, rather it is to update the narrower retail capacity component of it.

Scope of Work

- 1.4 This update report starts by considering updates to base population forecasting over the intervening period, before moving on to consider how base expenditure forecasts have also differed. Finally, after knitting together these two factors to provide updated expenditure forecasts for the Borough to 2035, we consider what capacity might exist for additional convenience and comparison goods floorspace after taking account of already committed retail development.

2.0 Base Population Updates

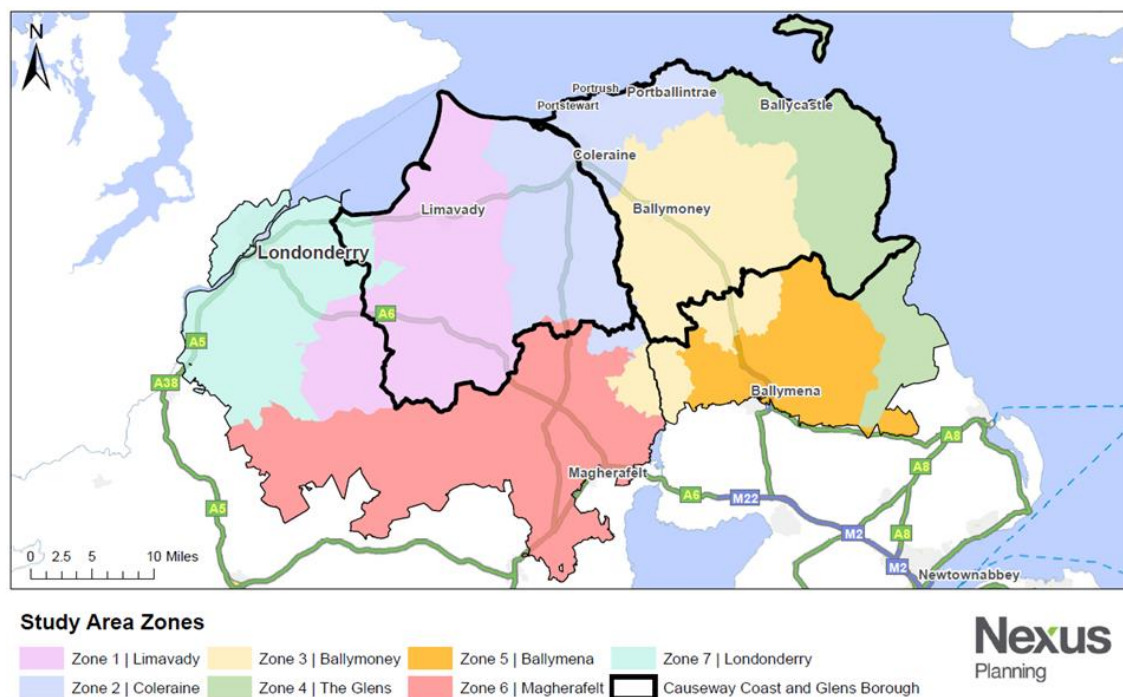
Background

2.1 We explained in Section 4 of the original Study our methodology for preparing expenditure data to the end of the Plan period, which at the time was 2030, and is now 2035. We agreed with the Council that the Study Area would comprise seven defined Zones, which cover the Borough and the area immediately surrounding the Borough. In broad terms, Zones 1 to 4 encompassed the Borough, while Zones 5 to 7 covered the area immediately surrounding the Borough. For ease of reference, we include Figures 4.1 and 4.2 of the original Study below. These components do not change.

Figure 4.1 | Definition of Survey Area Zones

Survey Zone	Postcode Sectors
Zone 1 Limavady	BT49 0, BT49 9, BT47 4
Zone 2 Coleraine	BT51 3, BT51 4, BT51 5, BT52 1, BT52 2, BT55 7, BT56 8, BT57 8
Zone 3 Ballymoney	BT44 8, BT44 9, BT53 6, BT53 7, BT53 8
Zone 4 The Glens	BT44 0, BT54 6
Zone 5 Ballymena	BT42 1, BT42 4, BT43 5, BT43 6, BT43 7
Zone 6 Magherafelt	BT45 5, BT45 7, BT45 8, BT46 5, BT79 8
Zone 7 Londonderry	BT47 2, BT47 3, BT47 5, BT47 6, BT48 0, BT48 6, BT48 7, BT48 8, BT48 9, BT82 0

Figure 4.2 | Survey Area Zones



Population

- 2.2 We were asked to model a single population scenario for the District, reflecting the population trajectory forecast by NISRA at that time. NISRA population datasets are based on assumptions relating to future fertility, mortality and migration. They do not attempt to predict the impact that future government policies and changing economic circumstances might have on demographic behaviour. The Council has confirmed that this remains their basis for future population assessment.
- 2.3 NISRA population growth forecasts are set out on an annual basis and are easy to extrapolate. The latest mid-year dataset (published April 2018) shows a population decrease of 0.1% for Causeway Coast & Glens Borough over the period 2020-2035. Those figures are applied to Zones 1-4.
- 2.4 The equivalent NISRA projection data is then applied for Zones 5 (Mid & East Antrim), 6 (Mid Ulster) and 7 (Derry City & Strabane), the majority of whose populations sit within other Local Government Areas.
- 2.5 The Study Area as a whole experiences a 0.8% increase in population over the period 2020-2035. We set out the resultant population forecast for the Study Area in Figure 2.1 below.

Figure 2.1: Population Projections – NISRA Base Population Forecast Scenario

Year	Zone							Total
	1	2	3	4	5	6	7	
2020	37,156	68,529	43,451	16,893	42,618	44,696	118,206	371,549
2021	37,192	68,595	43,493	16,909	42,738	45,052	118,230	372,209
2022	37,225	68,656	43,531	16,924	42,844	45,395	118,252	372,826
2023	37,240	68,684	43,550	16,931	42,949	45,731	118,246	373,332
2024	37,250	68,701	43,560	16,936	43,039	46,052	118,230	373,768
2025	37,248	68,699	43,559	16,935	43,126	46,370	118,181	374,118
2026	37,239	68,681	43,547	16,931	43,206	46,681	118,105	374,390
2027	37,218	68,643	43,524	16,921	43,274	46,977	118,001	374,558
2028	37,186	68,585	43,487	16,907	43,335	47,272	117,867	374,639
2029	37,154	68,525	43,448	16,892	43,383	47,557	117,698	374,657
2030	37,106	68,437	43,393	16,870	43,424	47,833	117,529	374,593
2031	37,052	68,338	43,330	16,846	43,465	48,100	117,335	374,467
2032	36,997	68,236	43,265	16,821	43,505	48,367	117,115	374,306
2033	36,933	68,118	43,190	16,792	43,546	48,625	116,880	374,084
2034	36,864	67,990	43,109	16,760	43,587	48,880	116,623	373,813
2035	36,784	67,843	43,016	16,724	43,628	49,140	116,358	373,494
Change (No.)	-372	-686	-435	-169	1,010	4,444	-1,848	1,945
Change (%)	-1.0%	-1.0%	-1.0%	-1.0%	2.4%	9.9%	-1.6%	0.5%

2.6 Importantly, the updated NISRA figures show a considerably reduced population growth forecast for Causeway Coast & Glens compared to those forecast at the time of our 2017 Study. At the time of our 2017 Study, NISRA forecasting resulted in a 1.3% population increase in Zones 1-4 over the period 2020-2030, which contrasts to a 0.1% population decrease over the period 2020-2030 under the latest study. The population then decreases a further 0.9% over the period 2030-2035.

3.0 Base Expenditure Updates

Background

- 3.1 Having established the population base for the scenario to be modelled, we now consider the expenditure per annum to be attributed to those populations.
- 3.2 Our original study was modelled on census-based local expenditure data provided by Experian, using their Micromarketer software system. This data is derived from 2011 census data and is updated by local surveys carried out by Experian, which enable small-area socio-economic output data at postcode level. At the time of our original study, this data was projected forward using Experian's Retail Planner Briefing Note 14 (ERPBN 14, November 2016). The Experian Retail Planner Note series considers a range of areas for economic forecasting in retail, including expenditure growth rates, special forms of trading (predominantly internet spend forecasting) and sales efficiency forecasts for existing floorspace.
- 3.3 A number of important expenditure inputs have changed over the period since November 2016, and the latest Experian Retail Planner Briefing Note 17 (ERPBN17, February 2020) reflects a considerably different economic and social landscape in the retail sector.
- 3.4 At the outset it is important to note that the latest Experian release does not account for the impacts which COVID-19 might have had on the short-medium and long-term economic outlook for retailing. It may therefore be necessary to update this data again prior to Independent Examination of the Plan. Notwithstanding, ERPBN17 is the latest available data, and is considerably more reflective of the current retail picture than ERPBN14, as we go on to examine below.

Inputs to the Expenditure Forecasts

- 3.5 Experian remains a robust source of such data and is widely used for forecasting retail capacity across the industry. Therefore, in keeping with the methodology employed in the original study, we have updated each of the following:
 - a) Expenditure per capita for each Zone (derived from Experian Micromarketer reports, September 2019);
 - b) Expenditure growth rates (Appendix 3, Figure 6, Experian Retail Planner Briefing Note 17,

February 2020);

- c) Special forms of trading (Appendix 3, Figure 5, Experian Retail Planner Briefing Note 17, February 2020);
- d) Sales efficiencies (Table 4a, Experian Retail Planner Briefing Note 17, February 2020); and
- e) Sales densities for individual retailers (updated by Nexus Planning, 2020).

3.6 In regard to these inputs, there have been some notable changes since the publication of the original study in 2017. Retail Planner Note 17 sets out the following headlines:

Key points from this year's report:

- The economy will remain on a slower growth path this year, due to lingering uncertainty during the Brexit transition period and a sluggish global economy;
- the medium/long term outlook for GDP is unchanged, with growth expected to remain below historic averages due to slower population rises and productivity;
- overall retail sales projections are little changed from last year, but the medium term outlook for special forms of trading (SFT) spending has been revised higher;
- prospects for retail floorspace have been revised down in line with stronger projections for sales efficiency and on-line sales.

3.7 This summary describes the position over the 12 months up to February 2020. The shift since the publication of Retail Planner Briefing Note 14 in 2016 is even more marked. In summary terms, there has been a substantial increase in the projected impact of special forms of trading (largely, the internet) over the period to 2035, whilst forecast growth rates have slowed significantly, particularly in comparison goods. In Figures 3.1 to 3.4 below, we set out the 'before' and 'after' figures in both cases, relative to the published versions of ERPBN14 and ERPBN17.

3.8 Figures 3.1 and 3.2 highlight the differences in **special forms of trading**, derived from Appendix 3, Figure 5 of both ERPBN's. The Figures show that the impact of internet spending is considerably higher than was forecast as relatively recently as 2016, and that spending online is now forecast to grow at a faster rate than was previously forecast. The differences are most pronounced in comparison goods spending, which was previously forecast to begin to 'flat-line' at around 2030, but which is now forecast to continue growing to 2035 and beyond.

3.9 When we model capacities, we deduct for Special Forms of Trading at the start of that process. Therefore, the effect of these revised forecasts for capacity assessment, is that there is less money now

forecast to be available for spending at bricks and mortar stores into the future. We explore how this affects Causeway Coast & Glens in Section 4.

Figure 3.1: Special Forms of Trading – Convenience Goods

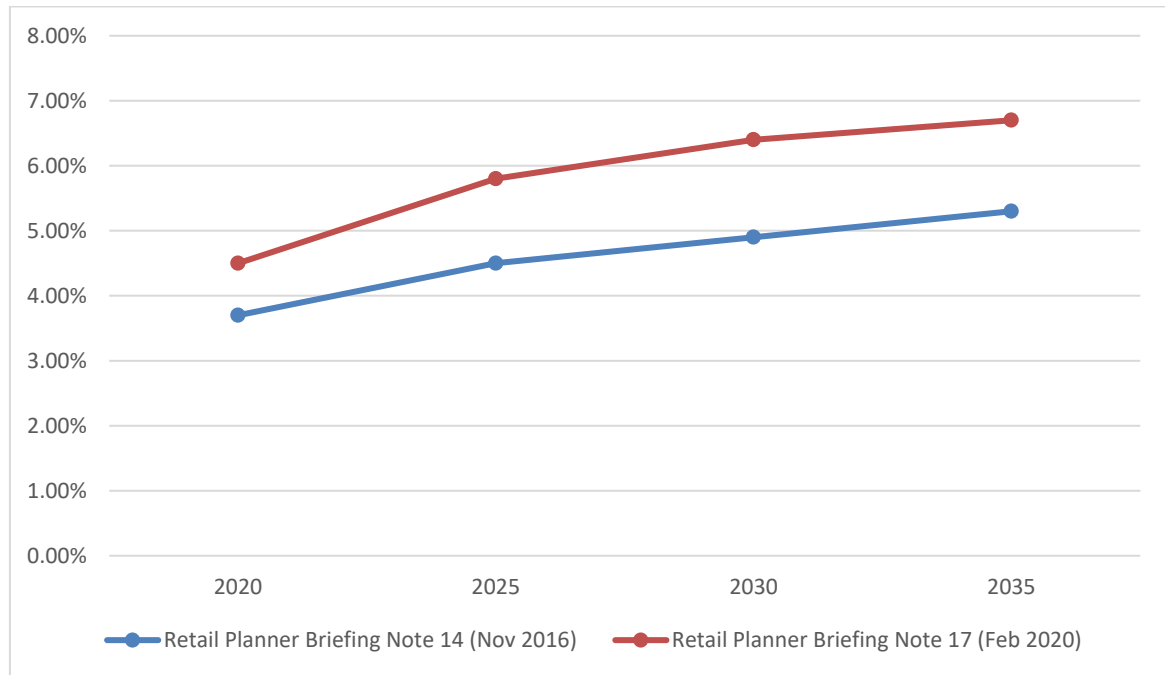
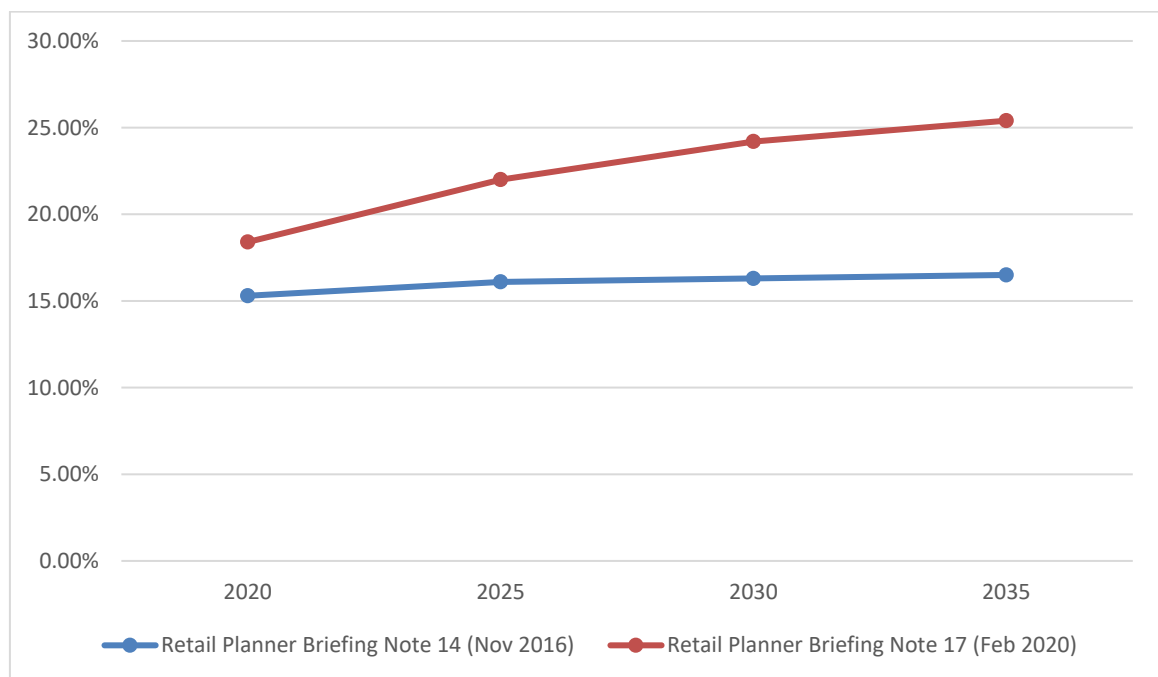


Figure 3.2: Special Forms of Trading – Comparison Goods



3.10 Figures 3.3 and 3.4 set out the differences in **expenditure growth rates**. This is the spend on convenience and comparison goods over the period to 2035 (adjusted for Special forms of Trading). These are the figures recommended for use by Experian when calculating the future demand for retail space (Appendix 3, Figure 6).

Figure 3.3: Expenditure Growth Rates – Convenience Goods

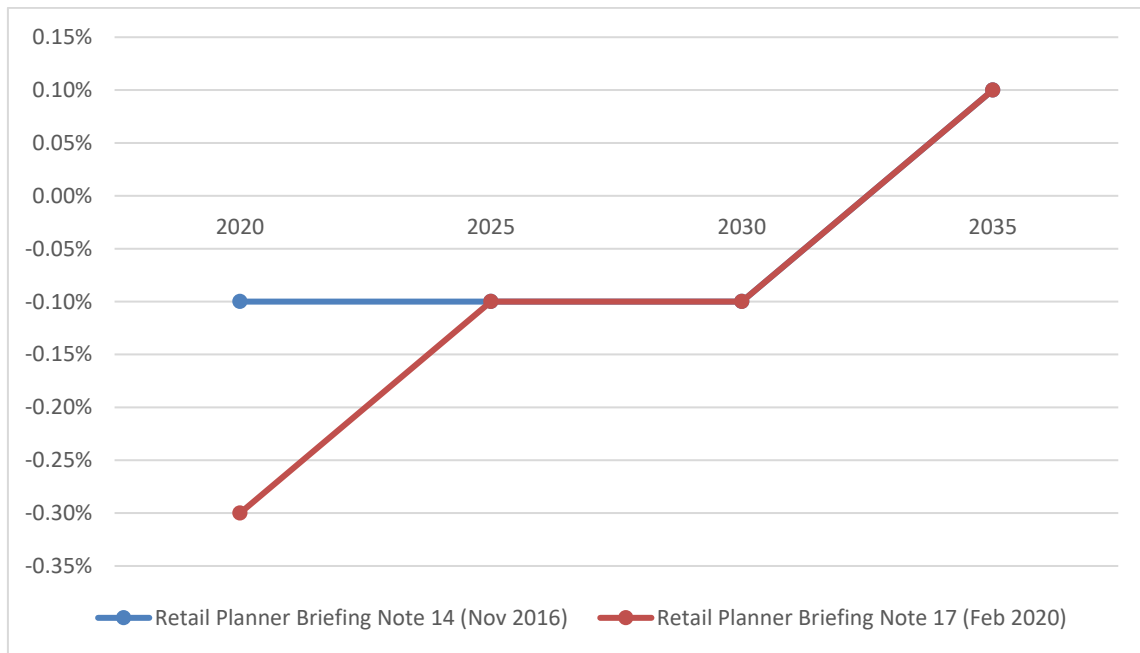
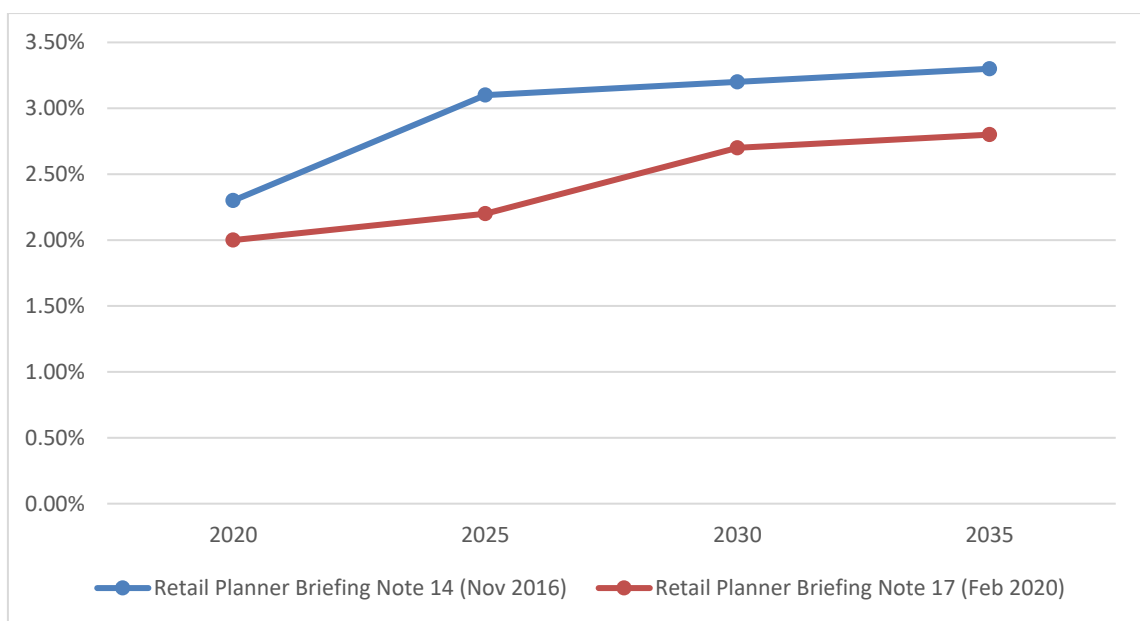


Figure 3.4: Expenditure Growth Rates – Comparison Goods



- 3.11 Figure 3.3 shows that convenience goods growth forecasts remain broadly similar to 2016 levels, with marginal negative growth forecast until 2030, before moving to small positive numbers between 2030-2035
- 3.12 Figure 3.4 shows that there has been a marked difference though in comparison goods forecasting. Whilst growth is positive at every year, the rate of growth has slowed significantly. Experian note that this is a factor of relatively sluggish incomes growth, coupled with a weakening globalisation effect on the prices of electronics and clothing.
- 3.13 The final input to take account of is **retail sales efficiencies**. This is a measure of the rate at which existing floorspace is forecast to benefit from consumer spending. Experian explain in ERPBN17 that there is likely to be a marked increase in sales efficiencies, particularly in the comparison goods sector. They comment as follows at Page 17:

Sales densities for comparison stores are expected to continue rising at a strong pace over the medium term. Budgetary challenges from rising costs and tight margins will continue to drive retailers to seek floor space efficiencies. Redevelopment of existing floorspace and new technology is assisting this trend. Lacklustre demand for retail property, stubborn levels of vacant units and lull in retail construction point to limited prospects for expansion in retail floorspace over the next few years. These results reflect national trends and there will be marked differences between local areas.

- 3.14 As a result, there has been a significant increase in forecast sales efficiencies since ERPBN14 in 2016. We summarise those changes in Figures 3.5 and 3.6 below. These rates take effect when we consider the rate of sales density growth in existing floorspace, as we explain in Section 4.

Figure 3.5: Sales Efficiency Rates – Convenience Goods

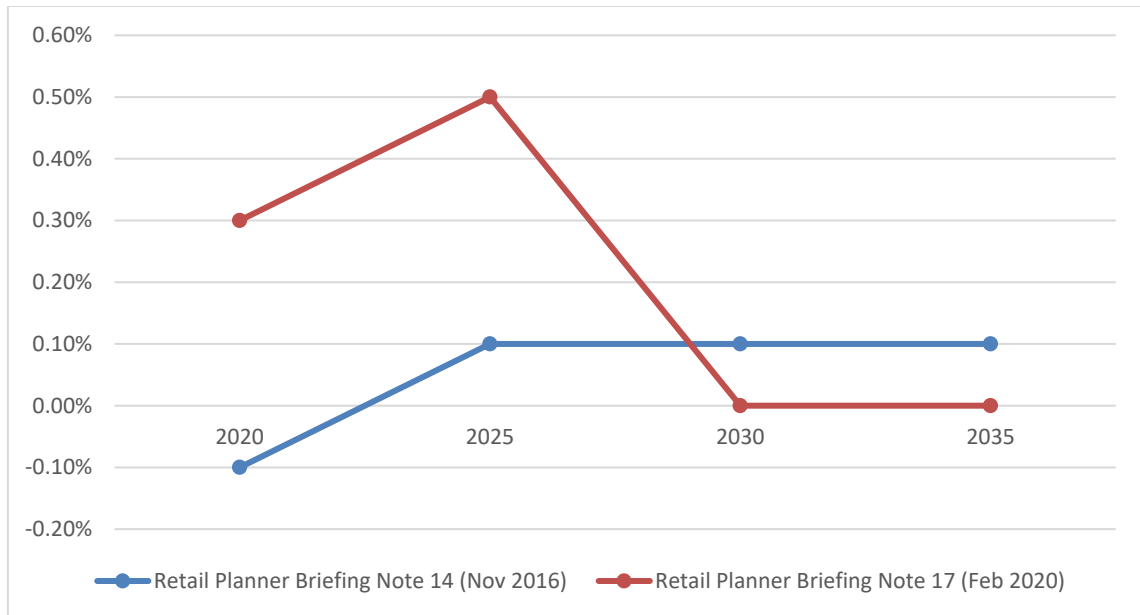
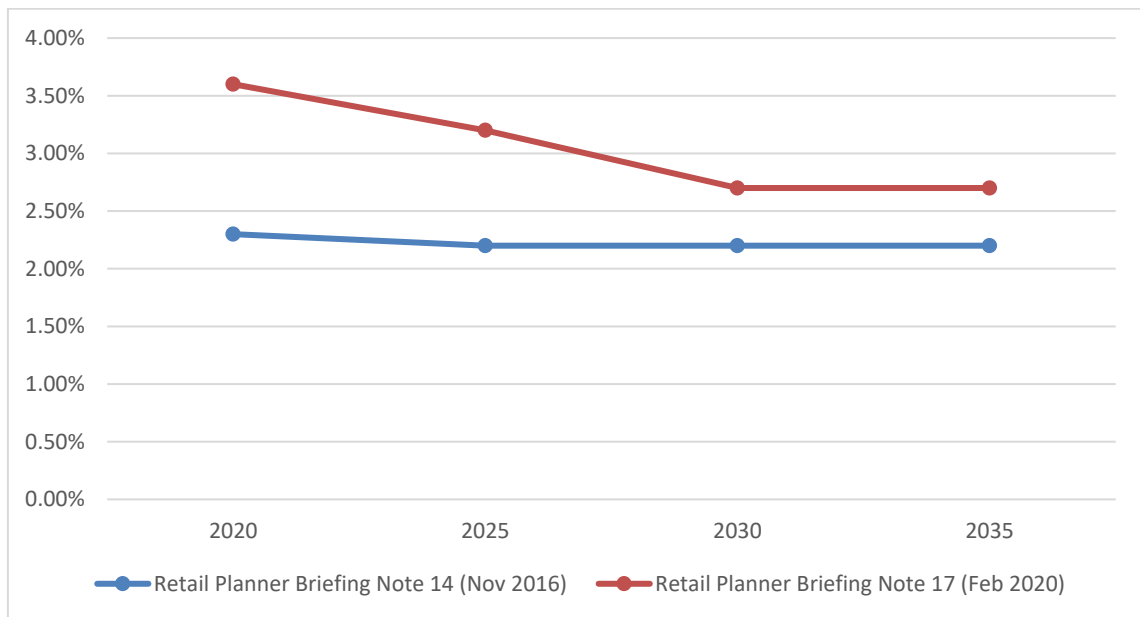


Figure 3.6: Sales Efficiency Rates – Comparison Goods



3.15 In light of the foregoing, the convenience and comparison goods per capita expenditure forecasts for the Study Area have materially changed between 2016-2020. We set out in Figures 3.7 and 3.8 the relative positions in terms of spend in each of the Zones. These figures are extrapolated from Tables 1 and 7b of Appendix A of this report.

Figure 3.7: Convenience Goods Expenditure per Capita

Convenience Goods Expenditure Per Capita (Excluding SFT)								
	Original Study (2017)	Update Study (2020)	Original Study (2017)	Update Study (2020)	Original Study (2017)	Update Study (2020)	Original Study (2017)	Update Study (2020)
Zone	2020		2025		2030		2035	
1	2,067	2,210	2,054	2,197	2,055	2,190	N/A	2,195
2	2,239	2,413	2,225	2,399	2,226	2,392	N/A	2,396
3	2,083	2,285	2,070	2,271	2,072	2,264	N/A	2,269
4	2,302	2,363	2,288	2,349	2,290	2,342	N/A	2,347
5	2,224	2,397	2,210	2,383	2,211	2,376	N/A	2,380
6	2,003	2,175	1,991	2,162	1,992	2,156	N/A	2,160
7	2,036	2,265	2,024	2,251	2,025	2,245	N/A	2,249

3.16 Figure 3.7 shows that per capita spend in every Zone has increased at like-for-like dates since the 2017 Study. Notwithstanding the fact that we now deduct higher levels of Special Forms of Trading (see Figure 3.1), this is a result of the Micromarketer surveys showing a significant uplift in per capita spending at the current date. By way of example, residents in Zone 1 (the Limavady area) were surveyed to spend £143 more per annum on convenience goods in 2020 than they were when surveyed in 2017 (projected to 2020).

3.17 Notwithstanding, the growth in spending over time has reduced slightly as a result of the trends in

Special Forms of Trading and Growth rates described above. Zone 1-4 residents were forecast to experience a 0.6% reduction in their spending over the period 2020-2030 under our original Study, whereas the latest data suggests that there will now be a 0.9% reduction in residents spending over the same period to 2030.

Figure 3.8: Comparison Goods Expenditure per Capita

Comparison Goods Expenditure Per Capita (Excluding SFT)								
	Original Study (2017)	Update Study (2020)	Original Study (2017)	Update Study (2020)	Original Study (2017)	Update Study (2020)	Original Study (2017)	Update Study (2020)
Zone	2020		2025		2030		2035	
1	2,834	2,573	3,267	2,883	3,815	3,262	N/A	3,734
2	3,241	2,863	3,737	3,208	4,364	3,629	N/A	4,154
3	2,868	2,639	3,306	2,957	3,861	3,345	N/A	3,830
4	3,037	2,500	3,501	2,801	4,088	3,169	N/A	3,628
5	3,155	2,802	3,638	3,139	4,248	3,552	N/A	4,066
6	2,825	2,621	3,257	2,936	3,803	3,322	N/A	3,803
7	2,709	2,511	3,122	2,813	3,646	3,183	N/A	3,644

- 3.18 Figure 3.8 shows that there is significantly reduced comparison goods spending in all seven Zones at 2020. Taking Zone 1 residents again as the example (the Limavady area), the Experian surveys show that residents spent £261 less per annum on comparison goods in 2020 than when they were surveyed in 2017 (projected to 2020).
- 3.19 Moreover, due to the increase in Comparison Goods Special Forms of Trading and reduced Growth Rates outlined above, the rate of growth has also slowed across all Zones to 2035. By way of example, the comparison goods spending of residents in Zones 1-4 was previously forecast to increase by 34.6%

over the period 2020-2030 at the time of our 2017 Study, whereas spending growth over the same period has slowed to 26.8% under the current Study. There is then forecast to be a further increase in spending of 14.5% over the period 2030-2035.

4.0 Retail Capacity Assessment Update

Introduction

- 4.1 As previously described, the market share information derived from the 2016 household surveys is re-utilised in our assessment and there are no changes to the information derived from those surveys (as described in Section 5 of the original Study). The alterations to the population and expenditure data described in Section 2 and 3 of this report do though follow through to our revised capacity findings.
- 4.2 In addition, and to reflect the passing of time, we have also updated our assessment of ‘commitments’ (i.e. permitted and/or not yet constructed developments).
- 4.3 Ultimately, we bring together each of these aspects to produce a revised capacity assessment for both convenience and comparison goods in the Borough to 2035. The figures should substitute for those set out in Section 6 of our original study.

Commitments

- 4.4 The Council has provided us with details of all planning applications for new retail floorspace which have been permitted over the period since our original Study in 2017. Each of these are summarised in more detail Tables 6c and 26c at Appendix A. The largest permissions granted in the interim period are as follows:
- a) Market Yard, Limavady – new Home Bargains retail unit comprising 754 sq m net convenience goods floorspace and 546 sq m net comparison goods floorspace (1,300 sq m net total). This permission has recently been implemented.
 - b) Main Street, Limavady – demolition of existing Lidl store and provision of new Lidl store (570 sq m net uplift in floorspace). This permission has been implemented.
 - c) Main Street/Charlotte Street, Ballymoney – new retail unit for Home Bargains comprising 568 sq m net convenience goods floorspace and 378 sq m net comparison goods floorspace (946 sq m net total). This permission has been implemented.
 - d) Ballybogey Road, Ballymoney – demolition of existing buildings and construction of replacement convenience store, off license and petrol forecourt (565 sq m net). This permission

has not yet been implemented.

- e) Meeting House Street, Ballymoney – new Lidl store comprising 1,136 sq m net convenience goods floorspace and 284 sq m net comparison goods floorspace. This permission has been implemented.
- f) The Promenade and Church Street, Portstewart – New retail units comprising 592 sq m net floorspace. This permission has been implemented.

Convenience and Comparison Goods Capacity

- 4.5 Based on all of the foregoing, we set out below the resultant updated capacity assessments for convenience goods and comparison goods across the Borough. Our updated assessments are included at **Appendix A** to this report.
- 4.6 To re-iterate the text from our original study, we consider both a 'minimum' and a 'maximum' figure when consider floorspace capacities. These figures are derived from appropriate average sales densities for convenience and comparison goods retail, as detailed fully in the notes to each table. By considering a range, we provide with the authority with capacity at either end of the spectrum. The minimum convenience goods capacities are based on an assumption that all of the expenditure is operated by a 'big 4' supermarket retailer, whilst the maximum capacity assumes that half of the expenditure is operated by the 'big 4', whilst the other half is operated by a wider range of retailers including discount retailers such as Lidl, as well as Spar, Co-op and others.
- 4.7 We summarise in Figures 4.1 and 4.2 the convenience and comparison goods capacities under the NISRA base population scenario.
- 4.8 Figure 4.1 shows that there continues to be a surplus of expenditure to support additional convenience goods floorspace in the Borough over the period to 2035. Those surpluses have reduced slightly when compared to our 2017 Study. This is reflective of reduced population growth forecasts, reduced growth rates and increased deductions for special forms of trading. Notwithstanding, the fact that base convenience goods spending has increased, coupled with the significant overtrade of existing foodstores established under our 2017 Study, means that there are still conditions to support a degree of additional growth.

- 4.9 In due course though, the Council is advised to conduct a further survey of households to understand the market share implications of the opening of three new discount foodstores since 2017. It may be appropriate to do so at or around the fifth anniversary of the last survey in 2022, as directed by SPPS (6.274).
- 4.10 The Council should note the suggested spatial distribution of capacity. Whilst these ranges are not intended to be applied rigorously, they do nonetheless give a broad indication of where there is likely to be expenditure headroom to support new facilities, and where there may not be. The assessment set out in Figure 4.1, for example, shows that any substantial new convenience goods facilities in Ballycastle, Portrush and in other towns and villages outside those listed, might have significant impacts on existing traders. This should be tested through Retail Impact Assessment provided by applicants where relevant.

Figure 4.1 | Convenience Goods Floorspace Capacity in Causeway Coast and Glens Borough

Year	Surplus Expenditure (£m)	Surplus Expenditure (£m)	Commitments (£)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
					Min ¹	Max ²
2020	Coleraine	54.9	1.8	53.0	4,100	5,200
	Limavady	35.6	11.4	24.2	1,900	2,400
	Ballymoney	31.7	20.0	11.7	900	1,100
	Ballycastle	0.5	0.6	-0.1	0	0
	Portrush	-6.0	0.0	-6.0	-500	-600
	Portstewart	8.4	0.0	8.4	700	800
	Rest of Borough	0.2	0.0	0.2	0	0
	Borough Total	125.2	33.8	91.4	7,100	8,900
2025	Coleraine	53.4	1.8	51.5	4,000	5,100
	Limavady	35.1	11.5	23.6	1,800	2,300
	Ballymoney	31.0	20.1	10.8	800	1,100
	Ballycastle	0.2	0.6	-0.4	0	0
	Portrush	-6.0	0.0	-6.0	-500	-600
	Portstewart	8.3	0.0	8.3	600	800
	Rest of Borough	0.0	0.0	0.0	0	0
	Borough Total	122.0	34.1	87.9	6,800	8,600
2030	Coleraine	52.3	1.8	50.4	3,900	5,000
	Limavady	34.6	11.5	23.1	1,800	2,300
	Ballymoney	30.4	20.1	10.3	800	1,000
	Ballycastle	0.1	0.6	-0.5	0	-100
	Portrush	-6.1	0.0	-6.1	-500	-600
	Portstewart	8.3	0.0	8.3	600	800
	Rest of Borough	-0.1	0	-0.1	0	0
	Borough Total	119.5	34.1	85.4	6,600	8,400
2035	Coleraine	51.2	1.8	49.3	3,800	4,900
	Limavady	34.1	11.5	22.6	1,800	2,200
	Ballymoney	29.8	20.1	9.7	800	1,000
	Ballycastle	-0.1	0.6	-0.7	-100	-100
	Portrush	-6.1	0.0	-6.1	-500	-600
	Portstewart	8.2	0.0	8.2	600	800
	Rest of Borough	-0.1	0.0	-0.1	0	0
	Borough Total	117.0	34.1	82.9	6,500	8,200

Source: Table 6a-6af, Appendix A. Figures may not add due to rounding.

- 4.11 Turning to consider comparison goods, the range of economic forecasts have combined to significantly reduce the previous forecast of available expenditure within the Borough. From a position in 2017 where there was identified positive Borough-wide capacity for between 3,200 to 5,000 sq m net of floorspace at 2030, this range is now negative at -5,400 to -8,500 sq m net at 2030. The extended capacity assessment to 2035 shows similar figures.
- 4.12 As described in Section 3, this is a product of the declining population forecast, reduced base expenditure figures, reduced comparison goods growth rates, increased special forms of trading deductions and an expectation that the sales efficiencies of existing retailers will increase. Each of these factors drives down the future demand for comparison goods floorspace in the Borough.
- 4.13 Figure 4.2 effectively shows that in line with UK trends, there will be a declining demand for bricks and mortar comparison goods floorspace into the future, and that with population growth marginally decreasing within the Borough, there is no additional influx of spending to off-set these macro-economic factors.

Figure 4.2 | Comparison Goods Floorspace Capacity in Causeway Coast and Glens Borough

Year	Surplus Expenditure (£m)	Surplus Expenditure (£m)	Commitments (£)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
					Min ¹	Max ²
2020	Coleraine	0.0	0.9	-0.9	-200	-200
	Limavady	0.0	2.5	-2.5	-400	-700
	Ballymoney	0.0	3.1	-3.1	-500	-800
	Ballycastle	0.0	0.0	0.0	0	0
	Portrush	0.0	2.6	-2.6	-400	-700
	Portstewart	0.0	2.7	-2.7	-500	-700
	Rest of Borough	0.0	0.0	0.0	0	0
	Borough Total	0.0	11.8	-11.8	-2,000	-3,100
2025	Coleraine	-12.8	1.0	-13.9	-2,000	-3,100
	Limavady	-1.6	2.7	-4.2	-600	-1,000
	Ballymoney	-1.6	3.4	-5.0	-700	-1,100
	Ballycastle	-0.5	0	-0.5	-100	-100
	Portrush	-0.2	2.8	-3.0	-400	-700
	Portstewart	-0.1	2.9	-3.0	-400	-700
	Rest of Borough	-0.3	0.0	-0.3	0	-100
	Borough Total	-17.1	12.9	-30.0	-4,300	-6,800
2030	Coleraine	-20.6	1.1	-21.7	-2,700	-4,300
	Limavady	-2.5	3.0	-5.5	-700	-1,100
	Ballymoney	-2.6	3.8	-6.4	-800	-1,300
	Ballycastle	-0.8	0	-0.8	-100	-200
	Portrush	-0.3	3.2	-3.4	-400	-700
	Portstewart	-0.1	3.2	-3.4	-400	-700
	Rest of Borough	-0.5	0.0	-0.5	-100	-100
	Borough Total	-27.4	14.3	-41.7	-5,200	-8,200
2035	Coleraine	-22.8	1.4	-24.2	-2,700	-4,200
	Limavady	-2.8	3.8	-6.6	-700	-1,100
	Ballymoney	-2.9	4.8	-7.7	-800	-1,300
	Ballycastle	-0.9	0.0	-0.9	-100	-200
	Portrush	-0.3	4.0	-4.3	-500	-700
	Portstewart	-0.1	4.1	-4.3	-500	-700
	Rest of Borough	-0.6	0.0	-0.6	-100	-100
	Borough Total	-30.4	18.1	-48.5	-5,300	-8,400

Source: Table 26a-26af, Appendix A. Figures may not add due to rounding.

Summary

- 4.14 Having taken account of necessary updates to the population, expenditure and commitments data within Causeway Coast & Glens Borough, we have set out in this section our updated convenience and comparison goods capacities.
- 4.15 Our assessment shows that there is no material capacity for comparison goods through until 2035 and beyond.
- 4.16 There is a small amount of identifiable convenience goods expenditure headroom, largely as a result of the over-trade position of existing stores.

Appendix A – Updated Statistical Assessment

Table 1: Population and convenience goods expenditure per capita

Zone	2020	2025	2030	2035	Per capita expenditure (£)				
					2018 <i>inc SFT</i>	2020	2025	2030	2035
1	37,156	37,248	37,106	36,784	2,340	2,210	2,197	2,190	2,195
2	68,529	68,699	68,437	67,843	2,555	2,413	2,399	2,392	2,396
3	43,451	43,559	43,393	43,016	2,419	2,285	2,271	2,264	2,269
4	16,893	16,935	16,870	16,724	2,502	2,363	2,349	2,342	2,347
5	42,618	43,126	43,424	43,628	2,538	2,397	2,383	2,376	2,380
6	44,696	46,370	47,833	49,140	2,303	2,175	2,162	2,156	2,160
7	118,206	118,181	117,529	116,358	2,398	2,265	2,251	2,245	2,249
Total	371,549	374,118	374,593	373,494					

Notes:

- a. Per capita expenditure derived from Experian MMG3 data (2020 report)
- b. 2020 base population for each zone derived from Experian MMG3 data (2020 report). Projected forward to 2030 using NISRA data for Causeway Coast and Glens District.
- c. Per capita expenditure projected forward using forecast growth rates taken from Table 6 of Experian Retail Planner Briefing Note 17 (February 2020)
- d. Expenditure excludes Special Forms of Trading in line with 'adjusted' allowance derived from Figure 5 of Annex 3 of Experian Retail Planner Briefing Note 17 (February 2020)

2018 Prices

Table 2a: Total convenience goods expenditure available

Zone	Expenditure (£m)						
	Convenience						
	2020	2025	2030	2035	2020-2025	2020-2030	2020-2035
1	82.1	81.8	81.3	80.7	-0.3	-0.8	-1.1
2	165.4	164.8	163.7	162.6	-0.6	-1.7	-2.2
3	99.3	98.9	98.3	97.6	-0.3	-1.0	-1.3
4	39.9	39.8	39.5	39.2	-0.1	-0.4	-0.5
Sub-total	386.7	385.3	382.7	380.2	-1.4	-4.0	-5.2
5	102.2	102.8	103.2	103.9	0.6	1.0	1.1
6	97.2	100.3	103.1	106.1	3.0	5.9	5.9
7	267.7	266.1	263.8	261.7	-1.7	-3.9	-4.4
Total	853.8	854.4	852.8	851.9	0.6	-1.0	-2.6

Table 2b: Convenience goods expenditure split between main food shopping and top-up food shopping spend

Zone	Expenditure (£m)		
	Convenience (2020)		
	Main	Top-up	Total
1	66.8	15.4	82.1
2	132.8	32.6	165.4
3	78.6	20.7	99.3
4	30.1	9.8	39.9
5	78.9	23.3	102.2
6	67.5	29.7	97.2
7	222.9	44.8	267.7
Total	677.6	176.3	853.8

Notes:

- a. Figures derived from multiplying per capita expenditure with population within each zone using data provided at Table 1
- b. Ratio of main food shopping to top-up food shopping per zone derived directly from NEMS Household Survey (October 2016)

2018 Prices

Table 5: Convenience goods shopping patterns

Destination	Gross Floorspace (Sq m)	Net Sales Area (Sq m)	Net Convenience Sales Area (A) (Sq m)	Sales Density (B) (£ per sq m)	Benchmark Turnover (AxB) (£m)	Turnover from Zones 1-4 (£m)	Inflow from Zones 5-7 and elsewhere Allowance (£m)	Estimated Survey T/O with Inflow (£m)	Trade against Benchmark (£m)
Study Area									
Zone 1 Limavady									
Limavady Town Centre									
Lidl, Main Street, Limavady		929	744	10,103	7.5	6.3	0.0	6.3	-1.2
Supervalu, Market Street, Limavady					2.5	2.5	0.0	2.5	0.0
Tesco, Main Street, Limavady	3,339	1,888	1,220	13,797	16.8	48.4	4.4	52.7	35.9
Local Shops, Limavady					3.4	3.4	0.5	3.9	0.5
Others									
Supervalu, Carvagh Road, Dungiven					7.2	7.2	0.0	7.2	0.0
Supervalu, Main Street, Ballykelly					0.5	0.5	0.0	0.5	0.0
Other, zone 1					5.2	5.2	0.4	5.6	0.4
Sub Total					43.0	73.4	5.3	78.7	35.6
Zone 2 Coleraine									
Coleraine Town Centre									
Iceland, Railway Road, Coleraine				6,859	1.5	1.5	0.0	1.5	0.0
M&S Simply Food, The Diamond, Coleraine	842	398	364	10,476	3.8	1.6	0.0	1.6	-2.2
Tesco, Banfield Road, Coleraine	4,470	2,817	1,820	13,797	25.1	25.7	2.4	28.1	3.0
Local shops, Coleraine					11.4	11.4	1.1	12.5	1.1
Out of centre									
Lidl, Glenmanus Road, Portrush		929	744	10,103	7.5	1.4	0.0	1.4	-6.1
Lidl, Riverside Retail Park, Coleraine		929	744	10,103	7.5	5.2	1.6	6.8	-0.7
Asda, Ring Road, Coleraine	7,154	3,323	2,056	13,659	28.1	47.6	4.9	52.5	24.4
Sainsbury's, Riverside Regional Park, Coleraine	4,648	2,602	1,783	11,691	20.8	48.7	1.4	50.1	29.2
Tesco, Coleraine Road, Portstewart	889	522	337	13,797	4.7	13.1	0.0	13.1	8.4
Supervalu, Station Road, Portstewart					0.0	0.0	0.0	0.0	0.0
Supervalu, Main Street, Garvagh					2.8	2.8	0.0	2.8	0.0
Local shops, Portrush					1.4	1.4	0.1	1.5	0.1
Other, zone 2 (Coleraine)					13.2	13.2	0.0	13.2	0.0
Sub Total					127.8	173.5	11.6	185.1	57.3
Zone 3 Ballymoney									
Ballymoney Town Centre									
Lidl, Meeting House Road, Ballymoney		929	744	10,103	7.5	1.3	0.0	1.3	-6.2
Tesco, Castle Street, Ballymoney	4,018	2,348	1,517	13,797	20.9	56.9	0.2	57.1	36.2
Local shops, Ballymoney					10.2	10.2	0.0	10.2	0.0
Out of centre									
Supervalu, Ballymena Road, Ballymoney					2.3	2.3	0.0	2.3	0.0
Other, zone 3 (Ballymoney)					10.1	10.1	1.7	11.8	1.7
Sub Total					51.0	80.7	1.9	82.7	31.7
Zone 4 The Glens									
Ballycastle Town Centre									
Co-op, The Diamond, Ballycastle		490	441	10,824	4.8	3.7	0.0	3.7	-1.1
Local Shops, Ballycastle					14.1	14.1	1.4	15.5	1.4
Other									
Eurospar, Coast Road, Cushendall		150	143	8,046	1.1	1.3	0.0	1.3	0.2
Other, zone 4 (The Glens)					1.8	1.8	0.2	2.0	0.2
Eurospar, Ramoan Road, Ballycastle				8,046	1.9	1.9	0.0	1.9	0.0
Sub Total					23.8	22.9	1.6	24.4	0.7
Sub Total Causeway Coast & Glens					245.6	350.5	20.4	370.9	125.2

Notes:
a. Zones based on post code sectors
b. Market shares for 'main' and 'top-up' shopping derived directly from NEMS Household Survey (October 2016)
c. Excludes 'don't know/varies', markets and internet sales
2018 Prices

Table 6a: Estimated 'capacity' for new convenience goods facilities in Causeway Coast & Glens

Year	Benchmark Turnover (£m) ¹	Survey Turnover (£m) ²	Inflow (£m)	Surplus Expenditure (£m)
2020	245.6	350.5	20.4	125.2
2025	247.6	349.2	20.3	122.0
2030	247.6	346.8	20.2	119.5
2035	247.6	344.5	20.1	117.0
Zone 1-4 Market Share (%)		90.6		

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 17 (February 2020)
2. Assumes constant market share claimed by Causeway Coast & Glens Borough facilities at 90.6% from Zones 1-4
2018 Prices

Table 6b: Gross quantitative capacity for additional convenience goods floorspace in Causeway Coast & Glens District

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq m net)	
		Min ¹	Max ²
2020	125.2	9,700	12,200
2025	122.0	9,500	12,000
2030	119.5	9,300	11,800
2035	117.0	9,100	11,500

1. Average sales density assumed to be £12,872 per sq.m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2018
2. 50% of residual expenditure assumed to be consumed by leading four supermarkets (£12,951/sq m) and 50% assumed to be consumed by discount operators (£7,547 per sq.m) as identified by Verdict 2018 and Mintel 2018. This equates to £10,249/sq m.
3. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 17 (February 2020)
2018 Prices

Table 6c: Extant convenience goods commitments in Causeway Coast & Glens

Destination	Reference	Proposal	Net Convenience Floorspace (sq m)	Estimated Sales Density (£/sq m)	Estimated Convenience Turnover (£m)	Status
1 Newmills Road, Coleraine	LA01/2017/0985/F	Proposed extension to store, new fuel forecourt and provision of new access to Ballycastle Road.	137	7,500	1.0	Permission granted 2019
1 Abbey Street, Coleraine	LA01/2018/1211/F	Proposed refurbishment of shop premises including demolition of front and rear walls, first floor rear extension, re-roofing, internal alterations and new shop front.	107	7,500	0.8	Permission granted 2019
Lands of former Market Yard located to rear of nos. 43-79 Catherine Street and rear of nos. 24-48 Linenhall Street and bounded by the River Roe to the West Limavady.	LA01/2017/1250/F	Retail unit with associated car parking, service yard, landscaping and retention of bank, site levelling works, access roads with entrance/egress from/to Catherine Street/Linenhall Street and associated site works.	754 convenience / 546 comparison	7,500	5.7	Permission granted 2019
71-85 Main Street Limavady	LA01/2019/0140/F	Demolition of Lidl supermarket and buildings at Nos 71-75 Main Street, erection of replacement supermarket, car parking and associated site works (amended scheme to that approved under LA01/2015/0380/F)	570	10,103	5.8	Permission granted 2019
Lands between rear of 11-39 Main Street and Sheils Court and rear of 16-26 Charlotte Street Ballymoney	LA01/2016/1146/F	New retail unit with car parking, service yard, access road, site access, boundary treatments and associated site works	568 convenience / 378 comparison	7,500	4.3	Permission granted 2017
8 Ballybogy Road Ballymoney	LA01/2018/0417/F	Demolition of existing buildings and construction of replacement convenience shop, off licence, canopy, petrol forecourt and associated access and parking arrangements.	565	7,500	4.2	Permission granted 2019
Lands incorporating Nos 18-24 and No 34 Meeting House Street Ballymoney	LA01/2018/0549/F	Construction of Lidl foodstore, provision of car parking, landscaping and associated site works	1,136 convenience / 284 comparison	10,103	11.5	Permission granted 2019
Spar Moyle Road 60 Moyle Road Ballycastle	LA01/2018/0981/F	A proposed single storey extension to the side elevation of the existing Spar Retail Store (Amended Description)	81	7,500	0.6	Permission granted 2020
Total			3,218		33.8	

1. Sales density based on Nexus Planning judgement of the nature of the proposal where the occupier has not been referenced within the application.
2018 Prices

Table 6d: Net quantitative capacity for additional convenience goods floorspace in Causeway Coast & Glens

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min	Max
2020	125.2	33.8	91.4	7,100	8,900
2025	122.0	34.1	87.9	6,800	8,600
2030	119.5	34.1	85.4	6,600	8,400
2035	117.0	34.1	82.9	6,500	8,200

1. Residual calculated by subtracting turnover of commitments (sourced from Table 6c) from surplus expenditure (sourced from Table 6a)
2. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 17 (February 2020)
2018 Prices

Table 6e: Estimated 'capacity' for new convenience goods facilities in Coleraine

Year	Benchmark Turnover (£m) ¹	Survey Turnover (£m) ²	Inflow (£m)	Surplus Expenditure (£m)
2020	111.4	154.8	11.5	54.9
2025	112.3	154.2	11.4	53.4
2030	112.3	153.2	11.3	52.3
2035	112.3	152.2	11.3	51.2
Zone 1-4 Market Share (%)	40.0			

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 17 (February 2020)
2. Assumes constant market share claimed by Coleraine facilities at 40.0% from Zones 1-4
2018 Prices

Table 6f: Gross quantitative capacity for additional convenience goods floorspace in Coleraine

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq m net)	
		Min ¹	Max ²
2020	54.9	4,200	5,400
2025	53.4	4,200	5,300
2030	52.3	4,100	5,100
2035	51.2	4,000	5,000

1. Average sales density assumed to be £12,872 per sq.m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2018
2. 50% of residual expenditure assumed to be consumed by leading four supermarkets (£12,951/sq m) and 50% assumed to be consumed by discount operators (£7,547 per sq.m) as identified by Verdict 2018 and Mintel 2018. This equates to £10,249/sq m.
3. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 17 (February 2020)
2018 Prices

Table 6g : Extant convenience goods commitments in Coleraine

Destination	Reference	Proposal	Net Convenience Floorspace (sq m)	Estimated Sales Density (£/sq m)	Estimated Convenience Turnover (£m)	Status
1 Newmills Road, Coleraine	LA01/2017/0985/F	Proposed extension to store, new fuel forecourt and provision of new access to Ballycastle Road.	137	7,500	1.0	Permission granted 2019
1 Abbey Street, Coleraine	LA01/2018/1211/F	Proposed refurbishment of shop premises including demolition of front and rear walls, first floor rear extension, re-roofing, internal alterations and new shop front.	107	7,500	0.8	Permission granted 2019
Total			244		1.8	

1. Sales density based on Nexus Planning judgement of the nature of the proposal where the occupier has not been referenced within the application.
2018 Prices

Table 6h: Net quantitative capacity for additional convenience goods floorspace in Coleraine

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min	Max
2020	54.9	1.8	53.0	4,100	5,200
2025	53.4	1.8	51.5	4,000	5,100
2030	52.3	1.8	50.4	3,900	5,000
2035	51.2	1.8	49.3	3,800	4,900

1. Residual calculated by subtracting turnover of commitments (sourced from Table 6g) from surplus expenditure (sourced from Table 6e)
2. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 17 (February 2020)
2018 Prices

Table 6i: Estimated 'capacity' for new convenience goods facilities in Limavady

Year	Benchmark Turnover (£m) ¹	Survey Turnover (£m) ²	Inflow (£m)	Surplus Expenditure (£m)
2020	35.4	65.7	5.3	35.6
2025	35.6	65.5	5.3	35.1
2030	35.6	65.0	5.2	34.6
2035	35.6	64.6	5.2	34.1
Zone 1-4 Market Share (%)		17.0		

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 17 (February 2020)
2. Assumes constant market share claimed by Limavady facilities at 17.0% from Zones 1-4
2018 Prices

Table 6j: Gross quantitative capacity for additional convenience goods floorspace in Limavady

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq m net)	
		Min ¹	Max ²
2020	35.6	2,700	3,500
2025	35.1	2,700	3,500
2030	34.6	2,700	3,400
2035	34.1	2,700	3,400

1. Average sales density assumed to be £12,872 per sq.m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2018
2. 50% of residual expenditure assumed to be consumed by leading four supermarkets (£12,951/sq m) and 50% assumed to be consumed by discount operators (£7,547 per sq.m) as identified by Verdict 2018 and Mintel 2018. This equates to £10,249/sq m.
3. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 17 (February 2020)
2018 Prices

Table 6k: Extant convenience goods commitments in Limavady

Destination	Reference	Proposal	Net Convenience Floorspace (sq m)	Estimated Sales Density (£/sq m)	Estimated Convenience Turnover (£m)	Status
Lands of former Market Yard located to rear of nos. 43-79 Catherine Street and rear of	LA01/2017/1250/F	Retail unit with associated car parking, service yard, landscaping and retention of bank, site	754 convenience / 546 comparison	7,500	5.7	Permission granted 2019
71-85 Main Street Limavady	LA01/2019/0140/F	Demolition of Lidl supermarket and buildings at Nos 71-75 Main Street, erection of replacement supermarket, car parking and associated site works (amended scheme to that approved under LA01/2015/0380/F)	570	10,103	5.8	Permission granted 2019
Total			1,324		11.4	

1. Sales density based on Nexus Planning judgement of the nature of the proposal where the occupier has not been referenced within the application.
2018 Prices

Table 6l: Net quantitative capacity for additional convenience goods floorspace in Limavady

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min	Max
2020	35.6	11.4	24.2	1,900	2,400
2025	35.1	11.5	23.6	1,800	2,300
2030	34.6	11.5	23.1	1,800	2,300
2035	34.1	11.5	22.6	1,800	2,200

1. Residual calculated by subtracting turnover of commitments (sourced from Table 6k) from surplus expenditure (sourced from Table 6i)
2. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 17 (February 2020)
2018 Prices

Table 6m: Estimated 'capacity' for new convenience goods facilities in Ballymoney

Year	Benchmark Turnover (£m) ¹	Survey Turnover (£m) ²	Inflow (£m)	Surplus Expenditure (£m)
2020	51.0	80.7	1.9	31.7
2025	51.4	80.5	1.9	31.0
2030	51.4	79.9	1.9	30.4
2035	51.4	79.4	1.9	29.8
Zone 1-4 Market Share (%)	20.9			

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 17 (February 2020)
2. Assumes constant market share claimed by Ballymoney facilities of 20.9% from Zones 1-4
2018 Prices

Table 6n: Gross quantitative capacity for additional convenience goods floorspace in Ballymoney

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq m net)	
		Min ¹	Max ²
2020	31.7	2,400	3,100
2025	31.0	2,400	3,000
2030	30.4	2,400	3,000
2035	29.8	2,300	2,900

1. Average sales density assumed to be £12,872 per sq.m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2018
2. 50% of residual expenditure assumed to be consumed by leading four supermarkets (£12,951/sq m) and 50% assumed to be consumed by discount operators (£7,547 per sq.m) as identified by Verdict 2018 and Mintel 2018. This equates to £10,249/sq m.
3. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 17 (February 2020)
2018 Prices

Table 6o: Extant convenience goods commitments in Ballymoney

Destination	Reference	Proposal	Net Convenience Floorspace (sq m)	Estimated Sales Density (£/sq m)	Estimated Convenience Turnover (£m)	Status
Lands between rear of 11-39 Main Street and Sheils Court and rear of 16-26 Charlotte Street Ballymoney	LA01/2016/1146/F	New retail unit with car parking, service yard, access road, site access, boundary treatments and associated site works	568 convenience / 378 comparison	7,500	4.3	Permission granted 2017
8 Ballybogy Road Ballymoney	LA01/2018/0417/F	Demolition of existing buildings and construction of replacement convenience shop, off licence, canopy, petrol forecourt and associated access and parking arrangements.	565	7,500	4.2	Permission granted 2019
Lands incorporating Nos 18-24 and No 34 Meeting House Street Ballymoney	LA01/2018/0549/F	Construction of discount foodstore, provision of car parking, landscaping and associated site works	1,136 convenience / 284 comparison	10,103	11.5	Permission granted 2019
Total			2,269		20.0	

1. Sales density based on Nexus Planning judgement of the nature of the proposal where the occupier has not been referenced within the application.
2018 Prices

Table 6p: Net quantitative capacity for additional convenience goods floorspace in Ballymoney

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min	Max
2020	31.7	20.0	11.7	900	1,100
2025	31.0	20.1	10.8	800	1,100
2030	30.4	20.1	10.3	800	1,000
2035	29.8	20.1	9.7	800	1,000

1. Residual calculated by subtracting turnover of commitments (sourced from Table 6o) from surplus expenditure (sourced from Table 6m)
2. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 17 (February 2020)
2018 Prices

Table 6q: Estimated 'capacity' for new convenience goods facilities in Ballycastle

Year	Benchmark Turnover (£m) ¹	Survey Turnover (£m) ²	Inflow (£m)	Surplus Expenditure (£m)
2020	22.6	21.5	1.6	0.5
2025	22.8	21.5	1.6	0.2
2030	22.8	21.3	1.6	0.1
2035	22.8	21.2	1.6	-0.1
Zone 1-4 Market Share (%)	5.6			

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 17 (February 2020)

2. Assumes constant market share claimed by Ballycastle facilities at 5.6% from Zones 1-4

2018 Prices

Table 6r: Gross quantitative capacity for additional convenience goods floorspace in Ballycastle

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq m net)	
		Min ¹	Max ²
2020	0.5	0	0
2025	0.2	0	0
2030	0.1	0	0
2035	-0.1	0	0

1. Average sales density assumed to be £12,872 per sq.m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2018

2. 50% of residual expenditure assumed to be consumed by leading four supermarkets (£12,951/sq m) and 50% assumed to be consumed by discount operators (£7,547 per sq.m) as identified by Verdict 2018 and Mintel 2018. This equates to £10,249/sq m.

3. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 17 (February 2020)

2018 Prices

Table 6s: Extant convenience goods commitments in Ballycastle

Destination	Reference	Proposal	Net Convenience Floorspace (sq m)	Estimated Sales Density (£/sq m)	Estimated Convenience Turnover (£m)	Status
Spar Moyle Road 60 Moyle Road Ballycastle	LA01/2018/0981/F	A proposed single storey extension to the side elevation of the existing Spar Retail Store (Amended Description)	81	7,500	0.6	Permission granted 2020
Total			81		0.6	

1. Sales density based on Nexus Planning judgement of the nature of the proposal where the occupier has not been referenced within the application.

2018 Prices

Table 6t: Net quantitative capacity for additional convenience goods floorspace in Ballycastle

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min	Max
2020	0.5	0.6	-0.1	0	0
2025	0.2	0.6	-0.4	0	0
2030	0.1	0.6	-0.5	0	-100
2035	-0.1	0.6	-0.7	-100	-100

1. Residual calculated by subtracting turnover of commitments (sourced from Table 6s) from surplus expenditure (sourced from Table 6q)

2. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 17 (February 2020)

2018 Prices

Table 6u: Estimated 'capacity' for new convenience goods facilities in Port Rush

Year	Benchmark Turnover (£m) ¹	Survey Turnover (£m) ²	Inflow (£m)	Surplus Expenditure (£m)
2020	8.9	2.8	0.1	-6.0
2025	9.0	2.8	0.1	-6.0
2030	9.0	2.8	0.1	-6.1
2035	9.0	2.8	0.1	-6.1
Zone 1-4 Market Share (%)	0.7			

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 17 (February 2020)

2. Assumes constant market share claimed by Port Rush facilities at 0.7% from Zones 1-4

2018 Prices

Table 6v: Gross quantitative capacity for additional convenience goods floorspace in Port Rush

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq m net)	
		Min ¹	Max ²
2020	-6.0	-500	-600
2025	-6.0	-500	-600
2030	-6.1	-500	-600
2035	-6.1	-500	-600

1. Average sales density assumed to be £12,872 per sq.m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2018

2. 50% of residual expenditure assumed to be consumed by leading four supermarkets (£12,951/sq m) and 50% assumed to be consumed by discount operators (£7,547 per sq.m) as identified by Verdict 2018 and Mintel 2018. This equates to £10,249/sq m.

3. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 17 (February 2020)

2018 Prices

Table 6w: Extant convenience goods commitments in Port Rush

Destination	Reference	Proposal	Net Convenience Floorspace (sq m)	Estimated Sales Density (£/sq m)	Estimated Convenience Turnover (£m)	Status
Total			0		0.0	

1. Sales density based on Nexus Planning judgement of the nature of the proposal where the occupier has not been referenced within the application.

2018 Prices

Table 6x: Net quantitative capacity for additional convenience goods floorspace in Port Rush

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min	Max
2020	-6.0	0.0	-6.0	-500	-600
2025	-6.0	0.0	-6.0	-500	-600
2030	-6.1	0.0	-6.1	-500	-600
2035	-6.1	0.0	-6.1	-500	-600

1. Residual calculated by subtracting turnover of commitments (sourced from Table 6w) from surplus expenditure (sourced from Table 6u)

2. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 17 (February 2020)

2018 Prices

Table 6y: Estimated 'capacity' for new convenience goods facilities in Portstewart

Year	Benchmark Turnover (£m) ¹	Survey Turnover (£m) ²	Inflow (£m)	Surplus Expenditure (£m)
2020	4.7	13.1	0.0	8.4
2025	4.7	13.0	0.0	8.3
2030	4.7	12.9	0.0	8.3
2035	4.7	12.9	0.0	8.2
Zone 1-4 Market Share (%)		3.4		

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 17 (February 2020)
2. Assumes constant market share claimed by Port Stewart facilities at 3.4% from Zones 1-4
2018 Prices

Table 6z: Gross quantitative capacity for additional convenience goods floorspace in Portstewart

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq m net)	
		Min ¹	Max ²
2020	8.4	700	800
2025	8.3	600	800
2030	8.3	600	800
2035	8.2	600	800

1. Average sales density assumed to be £12,872 per sq.m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2018
2. 50% of residual expenditure assumed to be consumed by leading four supermarkets (£12,951/sq m) and 50% assumed to be consumed by discount operators (£7,547 per sq.m) as identified by Verdict 2018 and Mintel 2018. This equates to £10,249/sq m.
3. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 17 (February 2020)
2018 Prices

Table 6aa: Extant convenience goods commitments in Portstewart

Destination	Reference	Proposal	Net Convenience Floorspace (sq m)	Estimated Sales Density (£/sq m)	Estimated Convenience Turnover (£m)	Status
Total			0		0.0	

1. Sales density based on Nexus Planning judgement of the nature of the proposal where the occupier has not been referenced within the application.
2018 Prices

Table 6ab: Net quantitative capacity for additional convenience goods floorspace in Portstewart

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min	Max
2020	8.4	0.0	8.4	700	800
2025	8.3	0.0	8.3	600	800
2030	8.3	0.0	8.3	600	800
2035	8.2	0.0	8.2	600	800

1. Residual calculated by subtracting turnover of commitments (sourced from Table 6aa) from surplus expenditure (sourced from Table 6y)
2. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 17 (February 2020)
2018 Prices

Table 6ac: Estimated 'capacity' for new convenience goods facilities in the Rest of the Borough

Year	Benchmark Turnover (£m) ¹	Survey Turnover (£m) ²	Inflow (£m)	Surplus Expenditure (£m)
2020	11.7	11.8	0.0	0.2
2025	11.7	11.8	0.0	0.0
2030	11.7	11.7	0.0	-0.1
2035	11.7	11.6	0.0	-0.1
Zone 1-4 Market Share (%)	3.1			

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 17 (February 2020)
2. Assumes constant market share claimed by Rest of the Borough facilities at 3.1% from Zones 1-4
2018 Prices

Table 6ad: Gross quantitative capacity for additional convenience goods floorspace in the Rest of the Borough

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq m net)	
		Min ¹	Max ²
2020	0.2	0	0
2025	0.0	0	0
2030	-0.1	0	0
2035	-0.1	0	0

1. Average sales density assumed to be £12,872 per sq.m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2018
2. 50% of residual expenditure assumed to be consumed by leading four supermarkets (£12,951/sq m) and 50% assumed to be consumed by discount operators (£7,547 per sq.m) as identified by Verdict 2018 and Mintel 2018. This equates to £10,249/sq m.
3. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 17 (February 2020)
2018 Prices

Table 6ae: Extant convenience goods commitments in the Rest of the Borough

Destination	Reference	Proposal	Net Convenience Floorspace (sq m)	Estimated Sales Density (£/sq m)	Estimated Convenience Turnover (£m)	Status
Total			0		0.0	

1. Sales density based on Nexus Planning judgement of the nature of the proposal where the occupier has not been referenced within the application.
2018 Prices

Table 6af: Net quantitative capacity for additional convenience goods floorspace in the Rest of the Borough

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min	Max
2020	0.2	0.0	0.2	0	0
2025	0.0	0.0	0.0	0	0
2030	-0.1	0.0	-0.1	0	0
2035	-0.1	0.0	-0.1	0	0

1. Residual calculated by subtracting turnover of commitments (sourced from Table 6ae) from surplus expenditure (sourced from Table 6ac)
2. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 17 (February 2020)
2018 Prices

Table 8: Total comparison goods expenditure available

Zone	Comparison goods expenditure (€m)										Comparison goods expenditure (€m)										Comparison goods expenditure (€m)										Comparison goods growth (€m)																		
	2020										2025										2030										2035										2020-2025			2020-2030			2020-2035		
	Clothes	CDs etc	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total		Clothes	CDs etc	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total		Clothes	CDs etc	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total		Clothes	CDs etc	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total		2020-2025	2020-2030	2020-2035						
1	31.2	4.4	22.0	12.1	5.9	9.0	5.7	5.4	95.6	35.1	4.9	24.7	13.6	6.5	10.1	6.5	6.1	107.4	39.6	5.5	27.8	15.3	7.4	11.3	7.3	6.8	121.0	45.3	6.9	31.8	17.5	8.4	13.0	8.3	7.8	138.6	11.8	25.4	42.9										
2	64.3	9.3	43.8	22.7	13.5	19.3	11.8	11.5	196.2	72.2	10.4	49.1	25.5	15.2	21.7	13.3	12.9	220.4	81.4	11.7	55.4	28.7	17.1	24.5	15.0	14.6	248.4	93.1	13.4	63.4	32.8	19.6	28.0	17.2	16.7	284.3	24.2	52.2	88.1										
3	36.3	5.4	26.1	15.1	7.3	10.4	7.4	6.7	114.7	40.7	6.1	29.3	16.9	8.2	11.7	8.3	7.5	128.8	45.9	6.9	33.1	19.1	9.2	13.2	9.4	8.4	145.2	52.6	7.9	37.8	21.9	10.5	15.1	10.7	9.7	166.2	14.1	30.5	51.5										
4	13.0	2.1	9.4	5.7	2.9	4.0	2.6	2.5	42.2	14.6	2.3	10.5	6.4	3.3	4.5	3.0	2.8	47.4	16.5	2.6	11.8	7.3	3.7	5.1	3.3	3.1	53.5	18.9	3.0	13.6	8.3	4.2	5.8	3.8	3.6	61.2	5.2	11.2	19.0										
5	38.8	5.6	27.6	13.6	6.0	11.5	7.3	7.0	119.4	44.0	6.4	31.3	15.4	9.0	13.0	8.3	8.0	135.4	50.1	7.3	35.7	17.6	10.3	14.8	9.4	9.1	154.2	57.4	8.3	40.8	20.1	11.8	17.0	10.8	10.4	176.6	16.0	34.8	57.1										
6	36.5	5.7	27.0	15.6	7.2	10.7	7.7	6.8	117.1	42.4	6.6	31.4	18.1	8.3	12.5	8.9	7.9	136.1	49.4	7.7	36.6	21.1	9.7	14.6	10.4	9.3	158.9	56.6	8.9	41.9	24.2	11.1	16.7	11.9	10.6	181.9	19.0	41.8	64.8										
7	101.6	13.2	68.7	33.8	19.0	28.1	15.7	16.8	296.8	113.8	14.8	76.9	37.8	21.2	31.4	17.6	18.8	332.5	128.1	16.6	86.6	42.6	23.9	35.4	19.8	21.1	374.1	146.6	19.0	99.1	48.7	27.4	40.5	22.7	24.2	428.2	35.7	77.3	131.4										
Total	321.7	45.7	224.5	118.5	63.6	93.0	58.3	56.7	982.1	362.9	51.5	253.3	133.8	71.8	104.9	65.9	63.9	1108.0	411.0	58.4	287.0	151.6	81.3	118.9	74.7	72.4	1255.3	470.5	66.8	328.5	173.6	93.1	136.1	85.5	82.9	1436.9	125.9	273.2	454.9										

Notes:
a. Per capita expenditure derived from Experian MMG3 data (2016 report)
b. Population derived from Experian MMG3 data (2016 report), projected forward using NISRA data.
c. Per capita expenditure projected forward using forecast growth rates taken from Table 1a of Experian Retail Planner Briefing Note 17
d. Expenditure excludes Special Forms of Trading in line with 'adjusted' allowance derived from Annex 3 of Experian Retail Planner Briefing Note 17

Table 9: Clothing & footwear shopping patterns

Destination	Total Clothing (%)	Zone 1 Clothing (%)	Zone 2 Clothing (%)	Zone 3 Clothing (%)	Zone 4 Clothing (%)	Zone 5 Clothing (%)	Zone 6 Clothing (%)	Zone 7 Clothing (%)
Study Area								
Zone 1 Limavady								
Dungiven	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Limavady	3.5	15.2	5.3	0.0	0.0	0.0	0.0	2.5
Other, zone 1 (Limavady)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	3.5	15.2	5.3	0.0	0.0	0.0	0.0	2.5
Zone 2 Coleraine								
Bushmills	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Coleraine	19.4	11.7	65.6	19.4	20.5	0.8	4.4	6.0
Kilrea	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Portrush	0.2	0.0	0.9	0.0	0.0	0.0	0.0	0.0
Portstewart	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Riverside Retail Park, Coleraine	1.9	0.0	3.4	0.7	8.2	0.0	4.0	1.1
Other, zone 2 (Coleraine)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	21.5	11.7	69.9	20.1	28.6	0.8	8.4	7.1
Zone 3 Ballymoney								
Ballymoney	2.0	0.0	0.0	13.8	3.4	0.6	0.0	0.0
Other, zone 3 (Ballymoney)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	2.0	0.0	0.0	13.8	3.4	0.6	0.0	0.0
Zone 4 The Glens								
Ballycastle	0.5	0.0	0.0	1.9	4.8	0.0	0.0	0.0
Cushendall	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	0.5	0.0	0.0	1.9	4.8	0.0	0.0	0.0
Sub Total Zones 1 - 4	27.5	26.9	75.3	35.8	36.8	1.4	8.4	9.6
Outside District								
Zone 5 Ballymena								
Ballymena	25.0	2.2	12.3	51.8	48.4	78.9	25.8	0.0
Broughshane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other, zone 5 (Ballymena)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	25.0	2.2	12.3	51.8	48.4	78.9	25.8	0.0
Zone 6 Magherafelt								
Maghera	0.1	0.0	0.0	0.0	0.0	0.0	0.8	0.0
Magherafelt	2.4	0.0	0.0	0.0	0.0	0.8	18.1	0.0
Other, zone 6 (Magherafelt)	0.1	0.0	0.0	0.0	0.0	0.0	0.8	0.0
Sub-total	2.6	0.0	0.0	0.0	0.0	0.8	19.7	0.0
Zone 7 Londonderry								
Crescent Link Retail Park, Londonderry	2.1	7.2	0.0	0.0	0.0	0.0	0.0	4.6
Eglinton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Londonderry	27.8	58.2	0.8	0.0	0.0	0.8	2.7	77.8
Other, zone 7 (Londonderry)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	29.8	65.4	0.8	0.0	0.0	0.8	2.7	82.4
Sub Total Study Area (Zones 1 - 7)	84.9	94.5	88.3	87.6	85.2	81.8	56.5	92.0
Others								
Antrim	0.3	0.0	0.9	0.0	0.9	0.6	0.0	0.0
Belfast	6.6	4.9	5.0	10.5	8.1	14.1	6.9	2.3
Braidwater Retail Park, Ballymena	0.4	0.0	0.0	1.9	0.9	0.8	0.0	0.0
Cookstown	2.3	0.0	0.0	0.0	0.0	0.0	17.9	0.0
Enniskillen	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Great Northern Retail Park, Sperrin Drive, Omagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Junction One Retail Park, Antrim	1.4	0.0	4.0	0.0	1.6	1.9	0.0	1.2
Laharna Retail Park, Larne	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Larne	0.0	0.0	0.0	0.0	0.8	0.0	0.0	0.0
Meadowlane Shopping Centre, Moneymore Road, Magherafelt	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newtownstewart	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Omagh	1.3	0.0	0.0	0.0	0.0	0.0	7.9	1.1
Orritor Road Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Showgrounds Retail Park, Sedan Avenue, Omagh	0.7	0.0	0.0	0.0	0.0	0.0	5.4	0.0
Station Square Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Strabane	1.2	0.0	0.0	0.0	0.0	0.0	4.7	2.3
Strabane Retail Park, Branch Road, Strabane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Abroad	0.3	0.6	0.9	0.0	1.8	0.0	0.0	0.0
Other, outside area	0.7	0.0	0.9	0.0	0.8	0.8	0.8	1.1
Sub Total Outside Study Area	15.1	5.5	11.7	12.4	14.8	18.2	43.5	8.0
TOTAL (Rounded)	100	100	100	100	100	100	100	100

Notes:

- a. Zones based on post code sectors
- b. Market shares for 'main' and 'top-up' shopping derived directly from NEMS Household Survey (October 2016)
- c. Excludes 'don't know/varies', markets and internet sales

Table 10: Clothing & footwear shopping patterns

Destination	Total Clothing (£m)	Zone 1 Clothing (£m)	Zone 2 Clothing (£m)	Zone 3 Clothing (£m)	Zone 4 Clothing (£m)	Zone 5 Clothing (£m)	Zone 6 Clothing (£m)	Zone 7 Clothing (£m)
Study Area								
Zone 1 Limavady								
Dungiven	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Limavady	10.7	4.8	3.4	0.0	0.0	0.0	0.0	2.5
Other, zone 1 (Limavady)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	10.7	2.0	2.1	0.0	0.0	0.0	0.0	0.0
Zone 2 Coleraine								
Bushmills	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Coleraine	63.5	3.7	42.1	7.0	2.7	0.3	1.6	6.1
Kilrea	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Portrush	0.6	0.0	0.6	0.0	0.0	0.0	0.0	0.0
Portstewart	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Riverside Retail Park, Coleraine, BT51 3AW	6.0	0.0	2.2	0.2	1.1	0.0	1.4	1.1
Other, zone 2 (Coleraine)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	70.2	3.7	44.9	7.3	3.7	0.3	3.1	7.2
Zone 3 Ballymoney								
Ballymoney	5.7	0.0	0.0	5.0	0.4	0.3	0.0	0.0
Other, zone 3 (Ballymoney)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	5.7	0.0	0.0	5.0	0.4	0.3	0.0	0.0
Zone 4 The Glens								
Ballycastle	1.3	0.0	0.0	0.7	0.6	0.0	0.0	0.0
Cushendall	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	1.3	0.0	0.0	0.7	0.6	0.0	0.0	0.0
Sub Total Zones 1 - 4	87.9	5.6	47.0	13.0	4.8	0.5	3.1	7.2
Outside District								
Zone 5 Ballymena								
Ballymena	73.7	0.7	7.9	18.8	6.3	30.6	9.4	0.0
Broughshane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other, zone 5 (Ballymena)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	73.7	0.7	7.9	18.8	6.3	30.6	9.4	0.0
Zone 6 Magherafelt								
Maghera	0.3	0.0	0.0	0.0	0.0	0.0	0.3	0.0
Magherafelt	6.9	0.0	0.0	0.0	0.0	0.3	6.6	0.0
Other, zone 6 (Magherafelt)	0.3	0.0	0.0	0.0	0.0	0.0	0.3	0.0
Sub-total	7.5	0.0	0.0	0.0	0.0	0.3	7.2	0.0
Zone 7 Londonderry								
Crescent Link Retail Park, Londonderry	6.9	2.2	0.0	0.0	0.0	0.0	0.0	4.7
Eglinton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Londonderry	99.0	18.2	0.5	0.0	0.0	0.3	1.0	79.0
Other, zone 7 (Londonderry)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	105.9	20.4	0.5	0.0	0.0	0.3	1.0	83.7
Sub Total Study Area (Zones 1 - 7)	275.0	26.8	55.4	31.8	11.1	31.7	20.6	90.9
Others								
Antrim	1.0	0.0	0.6	0.0	0.1	0.3	0.0	0.0
Belfast	19.9	1.5	3.2	3.8	1.1	5.5	2.5	2.4
Braidwater Retail Park, Ballymena	1.1	0.0	0.0	0.7	0.1	0.3	0.0	0.0
Cookstown	6.5	0.0	0.0	0.0	0.0	0.0	6.5	0.0
Enniskillen	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Great Northern Retail Park, Sperrin Drive, Omagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Junction One Retail Park, Antrim	4.8	0.0	2.6	0.0	0.2	0.7	0.0	1.3
Laharna Retail Park, Larne	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Larne	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.0
Meadowlane Shopping Centre, Moneymore Road, Magherafelt	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newtownstewart	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Omagh	3.9	0.0	0.0	0.0	0.0	0.0	2.9	1.1
Orritor Road Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Showgrounds Retail Park, Sedan Avenue, Omagh	2.0	0.0	0.0	0.0	0.0	0.0	2.0	0.0
Station Square Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Strabane	4.1	0.0	0.0	0.0	0.0	0.0	1.7	2.4
Strabane Retail Park, Branch Road, Strabane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Abroad	1.0	0.2	0.6	0.0	0.2	0.0	0.0	0.0
Other, outside area	2.3	0.0	0.6	0.0	0.1	0.3	0.3	1.1
Sub Total Outside Study Area	46.7	1.7	7.5	4.5	1.9	7.0	15.9	8.1
TOTAL (Rounded)	321.7	28.5	62.9	36.3	13.0	38.8	36.5	99.1

Notes:

- a. Zones based on post code sectors
- b. Market shares for 'main' and 'top-up' shopping derived directly from NEMS Household Survey (October 2016)
- c. Excludes 'don't know/varies', markets and internet sales

Table 11: Books, CDs, DVDs shopping patterns

Destination	Total Books, CDs, DVDs (%)	Zone 1 Books, CDs, DVDs (%)	Zone 2 Books, CDs, DVDs (%)	Zone 3 Books, CDs, DVDs (%)	Zone 4 Books, CDs, DVDs (%)	Zone 5 Books, CDs, DVDs (%)	Zone 6 Books, CDs, DVDs (%)	Zone 7 Books, CDs, DVDs (%)
Study Area								
Zone 1								
Dungiven	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Limavady	3.2	22.5	0.0	0.0	0.0	0.0	0.0	2.6
Other, zone 1 (Limavady)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	3.2	22.5	0.0	0.0	0.0	0.0	0.0	2.6
Zone 2								
Bushmills	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Coleraine	26.3	21.4	88.6	28.9	35.0	0.0	6.3	4.4
Kilrea	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Portrush	0.4	0.0	2.2	0.0	0.0	0.0	0.0	0.0
Portstewart	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Riverside Retail Park, Coleraine	0.8	0.0	2.2	1.7	1.9	0.0	0.0	0.0
Other, zone 2 (Coleraine)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	27.4	21.4	93.0	30.6	36.9	0.0	6.3	4.4
Zone 3								
Ballymoney	3.2	0.0	0.0	20.5	0.0	0.0	0.0	0.0
Other, zone 3 (Ballymoney)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	3.2	0.0	0.0	20.5	0.0	0.0	0.0	0.0
Zone 4								
Ballycastle	0.6	0.0	0.0	0.0	11.3	0.0	0.0	0.0
Cushendall	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	0.6	0.0	0.0	0.0	11.3	0.0	0.0	0.0
Sub Total Zones 1 - 4	54.7	46.1	97.4	91.8	87.0	94.3	38.1	6.9
Outside District								
Zone 5								
Ballymena	20.0	2.2	4.4	40.7	38.9	91.2	31.8	0.0
Broughshane	0.3	0.0	0.0	0.0	0.0	3.1	0.0	0.0
Other, zone 5 (Ballymena)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	20.3	2.2	4.4	40.7	38.9	94.3	31.8	0.0
Zone 6 Magherafelt								
Maghera	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Magherafelt	0.9	0.0	0.0	0.0	0.0	0.0	10.7	0.0
Other, zone 6 (Magherafelt)	0.3	0.0	0.0	0.0	0.0	0.0	3.1	0.0
Sub-total	1.2	0.0	0.0	0.0	0.0	0.0	13.9	0.0
Zone 7 Londonderry								
Crescent Link Retail Park, Londonderry	1.4	2.2	0.0	0.0	0.0	0.0	0.0	3.6
Eglinton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Londonderry	34.4	51.8	0.0	0.0	1.9	0.0	2.7	84.7
Other, zone 7 (Londonderry)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	35.8	53.9	0.0	0.0	1.9	0.0	2.7	88.3
Sub Total Study Area (Zones 1 - 7)	91.7	100.0	97.4	91.8	88.9	94.3	54.6	95.3
Others								
Antrim	0.3	0.0	0.0	0.0	2.2	2.6	0.0	0.0
Belfast	3.6	0.0	0.0	4.1	0.0	0.0	16.0	4.8
Braidwater Retail Park, Ballymena	0.8	0.0	0.0	4.1	2.2	0.0	0.0	0.0
Cookstown	2.1	0.0	0.0	0.0	2.2	0.0	23.6	0.0
Enniskillen	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Great Northern Retail Park, Sperrin Drive, Omagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Junction One Retail Park, Antrim	0.1	0.0	0.0	0.0	2.2	0.0	0.0	0.0
Laharna Retail Park, Larne	0.1	0.0	0.0	0.0	2.2	0.0	0.0	0.0
Larne	0.3	0.0	0.0	0.0	0.0	3.1	0.0	0.0
Meadowlane Shopping Centre, Moneymore Road, Magherafelt	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newtownstewart	0.5	0.0	2.6	0.0	0.0	0.0	0.0	0.0
Omagh	0.3	0.0	0.0	0.0	0.0	0.0	3.1	0.0
Orritor Road Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Showgrounds Retail Park, Sedan Avenue, Omagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Station Square Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Strabane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Strabane Retail Park, Branch Road, Strabane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Internet / delivered	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Abroad	0.2	0.0	0.0	0.0	0.0	0.0	2.7	0.0
Sub Total Outside Study Area	8.3	0.0	2.6	8.2	11.1	5.7	45.4	4.8
TOTAL (Rounded)	100	100	100	100	100	100	100	100

Notes:

- a. Zones based on post code sectors
- b. Market shares for 'main' and 'top-up' shopping derived directly from NEMS Household Survey (October 2016)
- c. Excludes 'don't know/varies', markets and internet sales

Table 12: Books, CDs, DVDs shopping patterns

Destination	Total Books, CDs, DVDs (£m)	Zone 1 Books, CDs, DVDs (£m)	Zone 2 Books, CDs, DVDs (£m)	Zone 3 Books, CDs, DVDs (£m)	Zone 4 Books, CDs, DVDs (£m)	Zone 5 Books, CDs, DVDs (£m)	Zone 6 Books, CDs, DVDs (£m)	Zone 7 Books, CDs, DVDs (£m)
Study Area								
Zone 1								
Dungiven	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Limavady	1.3	1.0	0.0	0.0	0.0	0.0	0.0	0.3
Other, zone 1 (Limavady)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	1.3	1.0	0.0	0.0	0.0	0.0	0.0	0.3
Zone 2								
Bushmills	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Coleraine	12.4	0.9	8.2	1.6	0.7	0.0	0.4	0.6
Kilrea	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Portrush	0.2	0.0	0.2	0.0	0.0	0.0	0.0	0.0
Portstewart	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Riverside Retail Park, Coleraine	0.3	0.0	0.2	0.1	0.0	0.0	0.0	0.0
Other, zone 2 (Coleraine)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	12.9	0.9	8.6	1.7	0.8	0.0	0.4	0.6
Zone 3								
Ballymoney	1.1	0.0	0.0	1.1	0.0	0.0	0.0	0.0
Other, zone 3 (Ballymoney)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	1.1	0.0	0.0	1.1	0.0	0.0	0.0	0.0
Zone 4								
Ballycastle	0.2	0.0	0.0	0.0	0.2	0.0	0.0	0.0
Cushendall	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	0.2	0.0	0.0	0.0	0.2	0.0	0.0	0.0
Sub Total Zones 1 - 4	26.2	2.0	9.0	5.0	1.8	5.3	2.2	0.9
Outside District								
Zone 5								
Ballymena	10.5	0.1	0.4	2.2	0.8	5.1	1.8	0.0
Broughshane	0.2	0.0	0.0	0.0	0.0	0.2	0.0	0.0
Other, zone 5 (Ballemena)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	10.6	0.1	0.4	2.2	0.8	5.3	1.8	0.0
Zone 6								
Maghera	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Magherafelt	0.6	0.0	0.0	0.0	0.0	0.0	0.6	0.0
Other, zone 6 (Magherafelt)	0.2	0.0	0.0	0.0	0.0	0.0	0.2	0.0
Sub-total	0.8	0.0	0.0	0.0	0.0	0.0	0.8	0.0
Zone 7								
Crescent Link Retail Park, Londonderry	0.6	0.1	0.0	0.0	0.0	0.0	0.0	0.5
Eglinton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Londonderry	13.6	2.3	0.0	0.0	0.0	0.0	0.2	11.2
Other, zone 7 (Londonderry)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	14.2	2.4	0.0	0.0	0.0	0.0	0.2	11.6
Sub Total Study Area (Zones 1 - 7)	41.2	4.4	9.0	5.0	1.9	5.3	3.1	12.6
Others								
Antrim	0.2	0.0	0.0	0.0	0.0	0.1	0.0	0.0
Belfast	1.8	0.0	0.0	0.2	0.0	0.0	0.9	0.6
Braidwater Retail Park, Ballymena	0.3	0.0	0.0	0.2	0.0	0.0	0.0	0.0
Cookstown	1.4	0.0	0.0	0.0	0.0	0.0	1.3	0.0
Enniskillen	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Great Northern Retail Park, Sperrin Drive, Omagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Junction One Retail Park, Antrim	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Laharna Retail Park, Larne	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Larne	0.2	0.0	0.0	0.0	0.0	0.2	0.0	0.0
Meadowlane Shopping Centre, Moneymore Road, Magherafelt	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newtownstewart	0.2	0.0	0.2	0.0	0.0	0.0	0.0	0.0
Omagh	0.2	0.0	0.0	0.0	0.0	0.0	0.2	0.0
Orritor Road Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Showgrounds Retail Park, Sedan Avenue, Omagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Station Square Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Strabane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Strabane Retail Park, Branch Road, Strabane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Internet/delivered	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Abroad	0.2	0.0	0.0	0.0	0.0	0.0	0.2	0.0
Sub Total Outside Study Area	4.5	0.0	0.2	0.4	0.2	0.3	2.6	0.6
TOTAL (Rounded)	45.7	4.4	9.3	5.4	2.1	5.6	5.7	13.2

Notes:

- a. Zones based on post code sectors
- b. Market shares for 'main' and 'top-up' shopping derived directly from NEMS Household Survey (October 2016)
- c. Excludes 'don't know/varies', markets and internet sales

Table 13: Small Household Goods shopping patterns

Destination	Total Small Household (%)	Zone 1 Small Household (%)	Zone 2 Small Household (%)	Zone 3 Small Household (%)	Zone 4 Small Household (%)	Zone 5 Small Household (%)	Zone 6 Small Household (%)	Zone 7 Small Household (%)
Study Area								
Zone 1								
Dungiven	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Limavady	1.6	15.3	0.0	0.0	0.0	0.0	0.0	0.0
Other, zone 1 (Limavady)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	1.6	15.3	0.0	0.0	0.0	0.0	0.0	0.0
Zone 2								
Bushmills	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Coleraine	11.4	8.7	41.3	10.8	17.9	0.0	3.5	2.7
Kilrea	0.2	0.0	1.4	0.0	0.0	0.0	0.0	0.0
Portrush	0.5	0.0	2.7	0.0	0.0	0.0	0.0	0.0
Portstewart	0.1	0.0	0.0	1.4	0.0	0.0	0.0	0.0
Riverside Retail Park, Coleraine	14.0	16.3	39.7	28.0	12.5	0.0	14.2	1.2
Other, zone 2 (Coleraine)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	26.2	25.0	85.0	40.1	30.4	0.0	17.7	3.9
Zone 3								
Ballymoney	2.6	0.0	2.5	20.8	0.0	0.0	0.0	0.0
Other, zone 3 (Ballymoney)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	2.6	0.0	2.5	20.8	0.0	0.0	0.0	0.0
Zone 4								
Ballycastle	0.9	0.0	0.0	0.0	23.1	0.0	0.0	0.0
Cushendall	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	0.9	0.0	0.0	0.0	23.1	0.0	0.0	0.0
Sub Total Zones 1 - 4	44.6	44.2	92.3	80.7	84.4	54.9	28.3	3.9
Outside District								
Zone 5								
Ballymena	13.2	3.9	4.8	19.8	31.0	54.9	10.6	0.0
Broughshane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other, zone 5 (Ballemena)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	13.2	3.9	4.8	19.8	31.0	54.9	10.6	0.0
Zone 6 Magherafelt								
Maghera	0.4	0.0	0.0	0.0	0.0	0.0	3.8	0.0
Magherafelt	2.6	2.7	3.3	0.0	0.0	0.0	17.1	0.0
Other, zone 6 (Magherafelt)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	2.9	2.7	3.3	0.0	0.0	0.0	21.0	0.0
Zone 7 Londonderry								
Crescent Link Retail Park, Londonderry	6.3	21.1	0.0	0.0	0.0	0.0	0.0	11.9
Eglinton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Londonderry	29.9	24.4	0.0	0.0	0.0	0.0	2.9	80.5
Other, zone 7 (Londonderry)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	36.1	45.5	0.0	0.0	0.0	0.0	2.9	92.4
Sub Total Study Area (Zones 1 - 7)	83.6	92.4	95.6	80.7	84.4	54.9	52.1	96.3
Others								
Antrim	0.1	0.0	0.0	0.0	1.5	0.0	0.0	0.0
Belfast	8.6	1.9	4.4	15.9	10.1	19.6	21.8	2.3
Braidwater Retail Park, Ballymena	4.5	5.7	0.0	3.3	1.5	24.6	1.4	0.0
Cookstown	1.6	0.0	0.0	0.0	0.0	1.0	15.3	0.0
Enniskillen	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Great Northern Retail Park, Sperrin Drive, Omagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Junction One Retail Park, Antrim	0.1	0.0	0.0	0.0	1.3	0.0	0.0	0.0
Laharna Retail Park, Larne	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Larne	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Meadowlane Shopping Centre, Moneymore Road, Magherafelt#	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newtownstewart	0.1	0.0	0.0	0.0	0.0	0.0	1.4	0.0
Omagh	0.5	0.0	0.0	0.0	0.0	0.0	5.3	0.0
Orritor Road Retail Park, Cookstown	0.1	0.0	0.0	0.0	0.0	0.0	1.4	0.0
Showgrounds Retail Park, Sedan Avenue, Omagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Station Square Retail Park, Cookstown	0.1	0.0	0.0	0.0	0.0	0.0	1.2	0.0
Strabane	0.5	0.0	0.0	0.0	0.0	0.0	0.0	1.4
Strabane Retail Park, Branch Road, Strabane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Internet / delivered	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Abroad	0.1	0.0	0.0	0.0	1.3	0.0	0.0	0.0
Sub Total Outside Study Area	16.4	7.6	4.4	19.3	15.6	45.1	47.9	3.7
TOTAL (Rounded)	100	100	100	100	100	100	100	100

Notes:

- a. Zones based on post code sectors
- b. Market shares for 'main' and 'top-up' shopping derived directly from NEMS Household Survey (October 2016)
- c. Excludes 'don't know/varies', markets and internet sales

Table 14: Small Household Goods shopping patterns

Destination	Total Small Household (£m)	Zone 1 Small Household (£m)	Zone 2 Small Household (£m)	Zone 3 Small Household (£m)	Zone 4 Small Household (£m)	Zone 5 Small Household (£m)	Zone 6 Small Household (£m)	Zone 7 Small Household (£m)
Study Area								
Zone 1								
Dungiven	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Limavady	3.4	3.4	0.0	0.0	0.0	0.0	0.0	0.0
Other, zone 1 (Limavady)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	3.4	3.4	0.0	0.0	0.0	0.0	0.0	0.0
Zone 2								
Bushmills	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Coleraine	27.3	1.9	18.1	2.8	1.7	0.0	0.9	1.9
Kilrea	0.6	0.0	0.6	0.0	0.0	0.0	0.0	0.0
Portrush	1.2	0.0	1.2	0.0	0.0	0.0	0.0	0.0
Portstewart	0.4	0.0	0.0	0.4	0.0	0.0	0.0	0.0
Riverside Retail Park, Coleraine	34.1	3.6	17.4	7.3	1.2	0.0	3.8	0.8
Other, zone 2 (Coleraine)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	63.5	5.5	37.2	10.5	2.8	0.0	4.8	2.7
Zone 3								
Ballymoney	6.5	0.0	1.1	5.4	0.0	0.0	0.0	0.0
Other, zone 3 (Ballymoney)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	6.5	0.0	1.1	5.4	0.0	0.0	0.0	0.0
Zone 4								
Ballycastle	2.2	0.0	0.0	0.0	2.2	0.0	0.0	0.0
Cushendall	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	2.2	0.0	0.0	0.0	2.2	0.0	0.0	0.0
Sub Total Zones 1 - 4	104.5	9.7	40.4	21.1	7.9	15.1	7.6	2.7
Outside District								
Zone 5								
Ballymena	29.0	0.9	2.1	5.2	2.9	15.1	2.9	0.0
Broughshane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other, zone 5 (Ballemena)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	29.0	0.9	2.1	5.2	2.9	15.1	2.9	0.0
Zone 6 Magherafelt								
Maghera	1.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0
Magherafelt	6.7	0.6	1.4	0.0	0.0	0.0	4.6	0.0
Other, zone 6 (Magherafelt)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	7.7	0.6	1.4	0.0	0.0	0.0	5.7	0.0
Zone 7 Londonderry								
Crescent Link Retail Park, Londonderry	12.8	4.6	0.0	0.0	0.0	0.0	0.0	8.2
Eglinton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Londonderry	61.4	5.4	0.0	0.0	0.0	0.0	0.8	55.3
Other, zone 7 (Londonderry)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	74.2	10.0	0.0	0.0	0.0	0.0	0.8	63.5
Sub Total Study Area (Zones 1 - 7)	186.5	20.3	41.8	21.1	7.9	15.1	14.1	66.2
Others								
Antrim	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.0
Belfast	20.3	0.4	1.9	4.2	0.9	5.4	5.9	1.6
Braidwater Retail Park, Ballymena	9.4	1.3	0.0	0.9	0.1	6.8	0.4	0.0
Cookstown	4.4	0.0	0.0	0.0	0.0	0.3	4.1	0.0
Enniskillen	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Great Northern Retail Park, Sperrin Drive, Omagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Junction One Retail Park, Antrim	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.0
Laharna Retail Park, Larne	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Larne	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Meadowlane Shopping Centre, Moneymore Road, Magherafelt	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newtownstewart	0.4	0.0	0.0	0.0	0.0	0.0	0.4	0.0
Omagh	1.4	0.0	0.0	0.0	0.0	0.0	1.4	0.0
Orritor Road Retail Park, Cookstown	0.4	0.0	0.0	0.0	0.0	0.0	0.4	0.0
Showgrounds Retail Park, Sedan Avenue, Omagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Station Square Retail Park, Cookstown	0.3	0.0	0.0	0.0	0.0	0.0	0.3	0.0
Strabane	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.9
Strabane Retail Park, Branch Road, Strabane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Internet/delivered	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Abroad	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub Total Outside Study Area	37.9	1.7	1.9	5.0	1.3	12.5	12.9	2.5
TOTAL (Rounded)	224.4	22.0	43.8	26.1	9.2	27.6	27.0	68.7

Notes:

- a. Zones based on post code sectors
- b. Market shares for 'main' and 'top-up' shopping derived directly from NEMS Household Survey (October 2016)
- c. Excludes 'don't know/varies', markets and internet sales

Table 15: Toys and Recreational Goods shopping patterns

Destination	Total Recreation (%)	Zone 1 Recreation (%)	Zone 2 Recreation (%)	Zone 3 Recreation (%)	Zone 4 Recreation (%)	Zone 5 Recreation (%)	Zone 6 Recreation (%)	Zone 7 Recreation (%)
Study Area								
Zone 1								
Dungiven	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Limavady	1.0	8.2	0.0	0.0	0.0	0.0	0.0	0.0
Other, zone 1 (Limavady)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	1.0	8.2	0.0	0.0	0.0	0.0	0.0	0.0
Zone 2								
Bushmills	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Coleraine	12.7	6.4	61.0	12.2	18.3	3.6	11.3	0.0
Kilrea	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Portrush	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Portstewart	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Riverside Retail Park, Coleraine	4.0	1.4	8.9	17.3	15.6	0.0	0.0	0.0
Other, zone 2 (Coleraine)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	16.7	7.8	69.9	29.5	33.9	3.6	11.3	0.0
Zone 3								
Ballymoney	1.2	0.0	4.8	4.9	0.0	0.0	0.0	0.0
Other, zone 3 (Ballymoney)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	1.2	0.0	4.8	4.9	0.0	0.0	0.0	0.0
Zone 4								
Ballycastle	0.2	0.0	0.0	0.0	4.9	0.0	0.0	0.0
Cushendall	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	0.2	0.0	0.0	0.0	4.9	0.0	0.0	0.0
Sub Total Zones 1 - 4	43.7	16.1	94.1	88.1	91.1	77.3	54.6	0.0
Outside District								
Zone 5								
Ballymena	24.7	0.0	19.3	53.8	52.4	73.7	43.3	0.0
Broughshane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other, zone 5 (Ballemena)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	24.7	0.0	19.3	53.8	52.4	73.7	43.3	0.0
Zone 6 Magherafelt								
Maghera	1.0	0.0	0.0	0.0	0.0	0.0	10.0	0.0
Magherafelt	0.7	0.0	0.0	0.0	0.0	0.0	7.2	0.0
Other, zone 6 (Magherafelt)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	1.8	0.0	0.0	0.0	0.0	0.0	17.2	0.0
Zone 7 Londonderry								
Crescent Link Retail Park, Londonderry	14.7	35.0	0.0	0.0	0.0	0.0	0.0	29.1
Eglinton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Londonderry	25.6	47.5	0.0	0.0	0.0	0.0	1.9	54.5
Other, zone 7 (Londonderry)	0.6	0.0	0.0	0.0	0.0	0.0	0.0	1.7
Sub-total	41.0	82.5	0.0	0.0	0.0	0.0	1.9	85.4
Sub Total Study Area (Zones 1 - 7)	86.4	98.6	94.1	88.1	91.1	77.3	73.7	85.4
Others								
Antrim	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Belfast	4.5	0.0	0.0	0.0	0.0	1.5	0.0	11.8
Braidwater Retail Park, Ballymena	4.2	0.0	0.0	11.9	8.9	19.9	0.0	0.0
Cookstown	1.7	1.4	0.0	0.0	0.0	0.0	14.7	0.0
Enniskillen	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Great Northern Retail Park, Sperrin Drive, Omagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Junction One Retail Park, Antrim	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Laharna Retail Park, Larne	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Larne	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Meadowlane Shopping Centre, Moneymore Road, Magherafelt	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newtownstewart	0.5	0.0	0.0	0.0	0.0	0.0	4.5	0.0
Omagh	0.7	0.0	0.0	0.0	0.0	0.0	7.1	0.0
Orritor Road Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Showgrounds Retail Park, Sedan Avenue, Omagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Station Square Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Strabane	1.3	0.0	5.9	0.0	0.0	0.0	0.0	1.4
Strabane Retail Park, Branch Road, Strabane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Internet / delivered	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Abroad	0.2	0.0	0.0	0.0	0.0	1.3	0.0	0.0
Other, outside area	0.5	0.0	0.0	0.0	0.0	0.0	0.0	1.4
Sub Total Outside Study Area	13.6	1.4	5.9	11.9	8.9	22.7	26.3	14.6
TOTAL (Rounded)	100	100	100	100	100	100	100	100

Notes:

- a. Zones based on post code sectors
- b. Market shares for 'main' and 'top-up' shopping derived directly from NEMS Household Survey (October 2016)
- c. Excludes 'don't know/varies', markets and internet sales

Table 16: Toys and Recreational Goods shopping patterns

Destination	Total Recreation (£m)	Zone 1 Recreation (£m)	Zone 2 Recreation (£m)	Zone 3 Recreation (£m)	Zone 4 Recreation (£m)	Zone 5 Recreation (£m)	Zone 6 Recreation (£m)	Zone 7 Recreation (£m)
Study Area								
Zone 1								
Dungiven	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Limavady	1.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0
Other, zone 1 (Limavady)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	1.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 2								
Bushmills	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Coleraine	19.7	0.8	13.8	1.8	1.0	0.5	1.8	0.0
Kilrea	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Portrush	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Portstewart	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Riverside Retail Park, Coleraine	5.7	0.2	2.0	2.6	0.9	0.0	0.0	0.0
Other, zone 2 (Coleraine)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	25.4	0.9	15.9	4.4	1.9	0.5	1.8	0.0
Zone 3								
Ballymoney	1.8	0.0	1.1	0.7	0.0	0.0	0.0	0.0
Other, zone 3 (Ballymoney)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	1.8	0.0	1.1	0.7	0.0	0.0	0.0	0.0
Zone 4								
Ballycastle	0.3	0.0	0.0	0.0	0.3	0.0	0.0	0.0
Cushendall	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	0.3	0.0	0.0	0.0	0.3	0.0	0.0	0.0
Sub Total Zones 1 - 4	60.8	1.9	21.3	13.3	5.2	10.5	8.5	0.0
Outside District								
Zone 5								
Ballymena	32.3	0.0	4.4	8.1	3.0	10.0	6.7	0.0
Broughshane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other, zone 5 (Ballemena)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	32.3	0.0	4.4	8.1	3.0	10.0	6.7	0.0
Zone 6 Magherafelt								
Maghera	1.6	0.0	0.0	0.0	0.0	0.0	1.6	0.0
Magherafelt	1.1	0.0	0.0	0.0	0.0	0.0	1.1	0.0
Other, zone 6 (Magherafelt)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	2.7	0.0	0.0	0.0	0.0	0.0	2.7	0.0
Zone 7 Londonderry								
Crescent Link Retail Park, Londonderry	14.1	4.2	0.0	0.0	0.0	0.0	0.0	9.8
Eglinton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Londonderry	24.5	5.7	0.0	0.0	0.0	0.0	0.3	18.4
Other, zone 7 (Londonderry)	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.6
Sub-total	39.1	10.0	0.0	0.0	0.0	0.0	0.3	28.8
Sub Total Study Area (Zones 1 - 7)	102.6	11.9	21.3	13.3	5.2	10.5	11.5	28.8
Others								
Antrim	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Belfast	4.2	0.0	0.0	0.0	0.0	0.2	0.0	4.0
Braidwater Retail Park, Ballymena	5.0	0.0	0.0	1.8	0.5	2.7	0.0	0.0
Cookstown	2.5	0.2	0.0	0.0	0.0	0.0	2.3	0.0
Enniskillen	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Great Northern Retail Park, Sperrin Drive, Omagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Junction One Retail Park, Antrim	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Laharna Retail Park, Larne	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Larne	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Meadowlane Shopping Centre, Moneymore Road, Magherafelt	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newtownstewart	0.7	0.0	0.0	0.0	0.0	0.0	0.7	0.0
Omagh	1.1	0.0	0.0	0.0	0.0	0.0	1.1	0.0
Orritor Road Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Showgrounds Retail Park, Sedan Avenue, Omagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Station Square Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Strabane	1.8	0.0	1.3	0.0	0.0	0.0	0.0	0.5
Strabane Retail Park, Branch Road, Strabane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Internet/delivered	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Abroad	0.2	0.0	0.0	0.0	0.0	0.2	0.0	0.0
Other, outside area	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.5
Sub Total Outside Study Area	15.9	0.2	1.3	1.8	0.5	3.1	4.1	4.9
TOTAL (Rounded)	118.5	12.1	22.7	15.1	5.7	13.6	15.6	33.8

Notes:

- a. Zones based on post code sectors
- b. Market shares for 'main' and 'top-up' shopping derived directly from NEMS Household Survey (October 2016)
- c. Excludes 'don't know/varies', markets and internet sales

Table 17: Chemist Goods shopping patterns

Destination	Total Chemist (%)	Zone 1 Chemist (%)	Zone 2 Chemist (%)	Zone 3 Chemist (%)	Zone 4 Chemist (%)	Zone 5 Chemist (%)	Zone 6 Chemist (%)	Zone 7 Chemist (%)
Study Area								
Zone 1								
Dungiven	0.8	7.9	0.0	0.0	0.0	0.0	0.0	0.0
Limavady	8.0	64.4	5.0	0.0	0.9	0.0	0.0	1.8
Other, zone 1 (Limavady)	0.7	4.2	0.0	0.0	0.0	0.0	0.0	0.8
Sub-total	9.5	76.5	5.0	0.0	0.9	0.0	0.0	2.6
Zone 2								
Bushmills	0.5	0.0	2.3	0.0	0.8	0.0	0.0	0.0
Coleraine	17.4	1.4	74.5	24.2	8.3	0.0	4.8	0.0
Kilrea	0.9	0.0	5.0	0.0	0.0	0.0	0.0	0.0
Portrush	0.5	0.0	2.5	0.0	0.0	0.0	0.0	0.0
Portstewart	0.8	0.0	4.6	0.0	0.0	0.0	0.0	0.0
Riverside Retail Park, Coleraine	0.2	0.0	0.7	0.0	2.2	0.0	0.0	0.0
Other, zone 2 (Coleraine)	0.7	0.0	4.0	0.0	0.0	0.0	0.0	0.0
Sub-total	21.0	1.4	93.6	24.2	11.3	0.0	4.8	0.0
Zone 3								
Ballymoney	4.2	0.0	0.7	36.0	0.8	0.0	0.0	0.0
Other, zone 3 (Ballymoney)	1.3	0.0	0.0	7.7	0.0	3.6	0.0	0.0
Sub-total	5.5	0.0	0.7	43.8	0.8	3.6	0.0	0.0
Zone 4								
Ballycastle	2.6	0.0	0.0	3.0	53.1	0.0	0.0	0.0
Cushendall	0.2	0.0	0.0	0.0	4.4	0.0	0.0	0.0
Sub-total	2.8	0.0	0.0	3.0	57.5	0.0	0.0	0.0
Sub Total Zones 1 - 4	38.8	77.9	99.3	71.0	70.5	3.6	4.8	2.6
Outside District								
Zone 5								
Ballymena	12.2	0.0	0.7	20.9	27.8	67.7	1.7	0.0
Broughshane	1.9	0.0	0.0	0.0	0.9	15.0	0.0	0.0
Other, zone 5 (Ballemena)	1.4	0.0	0.0	0.0	0.0	11.7	0.0	0.0
Sub-total	15.5	0.0	0.7	20.9	28.8	94.4	1.7	0.0
Zone 6 Magherafelt								
Maghera	2.9	0.0	0.0	0.0	0.0	0.0	23.4	0.0
Magherafelt	4.1	0.0	0.0	0.0	0.0	0.0	33.2	0.0
Other, zone 6 (Magherafelt)	1.5	0.0	0.0	4.0	0.0	0.0	8.6	0.0
Sub-total	8.5	0.0	0.0	4.0	0.0	0.0	65.2	0.0
Zone 7 Londonderry								
Crescent Link Retail Park, Londonderry	3.2	0.0	0.0	0.0	0.0	0.0	0.0	10.2
Eglinton	1.4	0.0	0.0	0.0	0.0	0.0	0.0	4.3
Londonderry	25.6	19.4	0.0	0.0	0.0	0.0	1.3	74.4
Other, zone 7 (Londonderry)	1.6	2.1	0.0	0.0	0.0	0.0	0.0	4.3
Sub-total	31.7	21.4	0.0	0.0	0.0	0.0	1.3	93.2
Sub Total Study Area (Zones 1 - 7)	94.6	99.4	100.0	96.0	99.2	98.1	73.0	95.8
Others								
Antrim	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Belfast	0.8	0.6	0.0	4.0	0.0	0.6	1.3	0.0
Braidwater Retail Park, Ballymena	0.2	0.0	0.0	0.0	0.0	1.3	0.0	0.0
Cookstown	1.6	0.0	0.0	0.0	0.0	0.0	12.6	0.0
Enniskillen	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Great Northern Retail Park, Sperrin Drive, Omagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Junction One Retail Park, Antrim	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Laharna Retail Park, Larne	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Larne	0.0	0.0	0.0	0.0	0.8	0.0	0.0	0.0
Meadowlane Shopping Centre, Moneymore Road, Magherafelt	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newtownstewart	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Omagh	1.1	0.0	0.0	0.0	0.0	0.0	8.7	0.0
Orritor Road Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Showgrounds Retail Park, Sedan Avenue, Omagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Station Square Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Strabane	1.9	0.0	0.0	0.0	0.0	0.0	4.3	4.2
Strabane Retail Park, Branch Road, Strabane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Internet / delivered	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Abroad	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other, outside area	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub Total Outside Study Area	5.4	0.6	0.0	4.0	0.8	1.9	27.0	4.2
TOTAL (Rounded)	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Notes:

- a. Zones based on post code sectors
- b. Market shares for 'main' and 'top-up' shopping derived directly from NEMS Household Survey (October 2016)
- c. Excludes 'don't know/varies', markets and internet sales

Table 18: Chemist Goods shopping patterns

Destination	Total Chemist (£m)	Zone 1 Chemist (£m)	Zone 2 Chemist (£m)	Zone 3 Chemist (£m)	Zone 4 Chemist (£m)	Zone 5 Chemist (£m)	Zone 6 Chemist (£m)	Zone 7 Chemist (£m)
Study Area								
Zone 1								
Dungiven	0.5	0.5	0.0	0.0	0.0	0.0	0.0	0.0
Limavady	4.8	3.8	0.7	0.0	0.0	0.0	0.0	0.3
Other, zone 1 (Limavady)	0.4	0.2	0.0	0.0	0.0	0.0	0.0	0.1
Sub-total	5.7	4.5	0.7	0.0	0.0	0.0	0.0	0.5
Zone 2								
Bushmills	0.3	0.0	0.3	0.0	0.0	0.0	0.0	0.0
Coleraine	12.5	0.1	10.1	1.8	0.2	0.0	0.3	0.0
Kilrea	0.7	0.0	0.7	0.0	0.0	0.0	0.0	0.0
Portrush	0.3	0.0	0.3	0.0	0.0	0.0	0.0	0.0
Portstewart	0.6	0.0	0.6	0.0	0.0	0.0	0.0	0.0
Riverside Retail Park, Coleraine	0.2	0.0	0.1	0.0	0.1	0.0	0.0	0.0
Other, zone 2 (Coleraine)	0.5	0.0	0.5	0.0	0.0	0.0	0.0	0.0
Sub-total	15.2	0.1	12.7	1.8	0.3	0.0	0.3	0.0
Zone 3								
Ballymoney	2.7	0.0	0.1	2.6	0.0	0.0	0.0	0.0
Other, zone 3 (Ballymoney)	0.9	0.0	0.0	0.6	0.0	0.3	0.0	0.0
Sub-total	3.6	0.0	0.1	3.2	0.0	0.3	0.0	0.0
Zone 4								
Ballycastle	1.8	0.0	0.0	0.2	1.5	0.0	0.0	0.0
Cushendall	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.0
Sub-total	1.9	0.0	0.0	0.2	1.7	0.0	0.0	0.0
Sub Total Zones 1 - 4	26.3	4.5	13.5	5.2	2.1	0.3	0.3	0.5
Outside District								
Zone 5								
Ballymena	7.9	0.0	0.1	1.5	0.8	5.4	0.1	0.0
Broughshane	1.2	0.0	0.0	0.0	0.0	1.2	0.0	0.0
Other, zone 5 (Ballemena)	0.9	0.0	0.0	0.0	0.0	0.9	0.0	0.0
Sub-total	10.1	0.0	0.1	1.5	0.8	7.5	0.1	0.0
Zone 6 Magherafelt								
Maghera	1.7	0.0	0.0	0.0	0.0	0.0	1.7	0.0
Magherafelt	2.4	0.0	0.0	0.0	0.0	0.0	2.4	0.0
Other, zone 6 (Magherafelt)	0.9	0.0	0.0	0.3	0.0	0.0	0.6	0.0
Sub-total	5.0	0.0	0.0	0.3	0.0	0.0	4.7	0.0
Zone 7 Londonderry								
Crescent Link Retail Park, Londonderry	1.9	0.0	0.0	0.0	0.0	0.0	0.0	1.9
Eglinton	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.8
Londonderry	15.3	1.1	0.0	0.0	0.0	0.0	0.1	14.1
Other, zone 7 (Londonderry)	0.9	0.1	0.0	0.0	0.0	0.0	0.0	0.8
Sub-total	19.0	1.3	0.0	0.0	0.0	0.0	0.1	17.7
Sub Total Study Area (Zones 1 - 7)	60.4	5.8	13.5	7.0	2.9	7.8	5.2	18.2
Others								
Antrim	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Belfast	0.5	0.0	0.0	0.3	0.0	0.0	0.1	0.0
Braidwater Retail Park, Ballymena	0.1	0.0	0.0	0.0	0.0	0.1	0.0	0.0
Cookstown	0.9	0.0	0.0	0.0	0.0	0.0	0.9	0.0
Enniskillen	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Great Northern Retail Park, Sperrin Drive, Omagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Junction One Retail Park, Antrim	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Laharna Retail Park, Larne	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Larne	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Meadowlane Shopping Centre, Moneymore Road, Magherafelt	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newtownstewart	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Omagh	0.6	0.0	0.0	0.0	0.0	0.0	0.6	0.0
Orritor Road Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Showgrounds Retail Park, Sedan Avenue, Omagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Station Square Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Strabane	1.1	0.0	0.0	0.0	0.0	0.0	0.3	0.8
Strabane Retail Park, Branch Road, Strabane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Internet/delivered	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Abroad	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other, outside area	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub Total Outside Study Area	3.2	0.0	0.0	0.3	0.0	0.2	1.9	0.8
TOTAL (Rounded)	63.6	5.8	13.5	7.3	2.9	8.0	7.2	19.0

Notes:

- a. Zones based on post code sectors
- b. Market shares for 'main' and 'top-up' shopping derived directly from NEMS Household Survey (October 2016)
- c. Excludes 'don't know/varies', markets and internet sales

Table 19: Electrical Goods shopping patterns

Destination	Total Electrical (%)	Zone 1 Electrical (%)	Zone 2 Electrical (%)	Zone 3 Electrical (%)	Zone 4 Electrical (%)	Zone 5 Electrical (%)	Zone 6 Electrical (%)	Zone 7 Electrical (%)
Study Area								
Zone 1								
Dungiven	0.4	3.6	0.0	0.0	0.0	0.0	0.0	0.0
Limavady	7.0	38.9	0.0	0.0	0.0	0.0	0.0	9.0
Other, zone 1 (Limavady)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	7.4	42.4	0.0	0.0	0.0	0.0	0.0	9.0
Zone 2								
Bushmills	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Coleraine	7.6	1.5	27.6	14.7	9.2	0.0	0.0	0.0
Kilrea	2.4	0.8	8.4	3.0	0.0	0.0	4.0	0.0
Portrush	0.2	0.0	1.0	0.0	1.0	0.0	0.0	0.0
Portstewart	0.4	0.0	2.1	0.0	0.0	0.0	0.0	0.0
Riverside Retail Park, Coleraine	16.4	11.5	41.2	28.5	17.0	0.7	24.8	2.2
Other, zone 2 (Coleraine)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	27.0	13.7	80.4	46.2	27.3	0.7	28.9	2.2
Zone 3								
Ballymoney	8.1	1.8	15.9	27.0	9.3	5.2	3.3	0.0
Other, zone 3 (Ballymoney)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	8.1	1.8	15.9	27.0	9.3	5.2	3.3	0.0
Zone 4								
Ballycastle	1.5	0.0	0.0	0.9	28.8	0.0	0.0	0.0
Cushendall	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	1.5	0.0	0.0	0.9	28.8	0.0	0.0	0.0
Sub Total Zones 1 - 4	43.9	58.0	96.3	74.1	65.4	5.9	32.1	11.2
Outside District								
Zone 5								
Ballymena	13.0	0.0	2.7	19.1	23.9	62.2	7.8	0.0
Broughshane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other, zone 5 (Ballemena)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	13.0	0.0	2.7	19.1	23.9	62.2	7.8	0.0
Zone 6 Magherafelt								
Maghera	0.6	0.0	0.0	0.0	0.0	0.0	7.0	0.0
Magherafelt	2.2	0.0	0.0	0.0	0.0	0.0	24.0	0.0
Other, zone 6 (Magherafelt)	0.9	0.0	0.0	4.4	0.0	0.0	3.5	0.0
Sub-total	3.7	0.0	0.0	4.4	0.0	0.0	34.4	0.0
Zone 7 Londonderry								
Crescent Link Retail Park, Londonderry	18.5	26.5	0.0	0.0	0.0	0.0	0.0	51.0
Eglinton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Londonderry	11.3	14.7	0.0	0.0	0.0	0.0	1.2	31.2
Other, zone 7 (Londonderry)	1.0	0.0	0.0	0.0	0.0	0.0	0.0	3.2
Sub-total	30.8	41.3	0.0	0.0	0.0	0.0	1.2	85.4
Sub Total Study Area (Zones 1 - 7)	91.4	99.2	99.0	97.5	89.3	68.1	75.6	96.6
Others								
Antrim	0.1	0.0	0.0	0.0	0.0	0.7	0.0	0.0
Belfast	1.3	0.8	0.0	0.7	0.0	0.7	0.0	3.4
Braidwater Retail Park, Ballymena	4.9	0.0	0.0	0.9	6.8	29.6	6.5	0.0
Cookstown	0.9	0.0	0.0	0.0	0.0	0.0	10.1	0.0
Enniskillen	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Great Northern Retail Park, Sperrin Drive, Omagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Junction One Retail Park, Antrim	0.1	0.0	0.0	0.0	1.1	0.0	0.0	0.0
Laharna Retail Park, Larne	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Larne	0.1	0.0	0.0	0.0	2.8	0.0	0.0	0.0
Meadowlane Shopping Centre, Moneymore Road, Magherafelt	0.1	0.0	0.0	0.0	0.0	0.0	1.0	0.0
Newtownstewart	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Omagh	0.5	0.0	0.0	0.0	0.0	0.0	5.6	0.0
Orritor Road Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Showgrounds Retail Park, Sedan Avenue, Omagh	0.2	0.0	0.0	0.0	0.0	0.9	1.2	0.0
Station Square Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Strabane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Strabane Retail Park, Branch Road, Strabane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Abroad	0.3	0.0	1.0	0.9	0.0	0.0	0.0	0.0
Other, outside area	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub Total Outside Study Area	8.6	0.8	1.0	2.5	10.7	31.9	24.4	3.4
TOTAL (Rounded)	100	100	100	100	100	100	100	100

Notes:

- a. Zones based on post code sectors
- b. Market shares for 'main' and 'top-up' shopping derived directly from NEMS Household Survey (October 2016)
- c. Excludes 'don't know/varies', markets and internet sales

Table 20: Electrical Goods shopping patterns

Destination	Total Electrical (£m)	Zone 1 Electrical (£m)	Zone 2 Electrical (£m)	Zone 3 Electrical (£m)	Zone 4 Electrical (£m)	Zone 5 Electrical (£m)	Zone 6 Electrical (£m)	Zone 7 Electrical (£m)
Study Area								
Zone 1								
Dungiven	0.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0
Limavady	6.0	3.5	0.0	0.0	0.0	0.0	0.0	2.5
Other, zone 1 (Limavady)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	6.3	3.8	0.0	0.0	0.0	0.0	0.0	2.5
Zone 2								
Bushmills	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Coleraine	7.4	0.1	5.3	1.5	0.4	0.0	0.0	0.0
Kilrea	2.4	0.1	1.6	0.3	0.0	0.0	0.4	0.0
Portrush	0.2	0.0	0.2	0.0	0.0	0.0	0.0	0.0
Portstewart	0.4	0.0	0.4	0.0	0.0	0.0	0.0	0.0
Riverside Retail Park, Coleraine	16.0	1.0	8.0	3.0	0.7	0.1	2.7	0.6
Other, zone 2 (Coleraine)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	26.5	1.2	15.5	4.8	1.1	0.1	3.1	0.6
Zone 3								
Ballymoney	7.4	0.2	3.1	2.8	0.4	0.6	0.4	0.0
Other, zone 3 (Ballymoney)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	7.4	0.2	3.1	2.8	0.4	0.6	0.4	0.0
Zone 4								
Ballycastle	1.2	0.0	0.0	0.1	1.2	0.0	0.0	0.0
Cushendall	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	1.2	0.0	0.0	0.1	1.2	0.0	0.0	0.0
Sub Total Zones 1 - 4	41.4	5.2	18.6	7.7	2.6	0.7	3.5	3.1
Outside District								
Zone 5								
Ballymena	11.4	0.0	0.5	2.0	1.0	7.1	0.8	0.0
Broughshane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other, zone 5 (Ballemena)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	11.4	0.0	0.5	2.0	1.0	7.1	0.8	0.0
Zone 6 Magherafelt								
Maghera	0.7	0.0	0.0	0.0	0.0	0.0	0.7	0.0
Magherafelt	2.6	0.0	0.0	0.0	0.0	0.0	2.6	0.0
Other, zone 6 (Magherafelt)	0.8	0.0	0.0	0.5	0.0	0.0	0.4	0.0
Sub-total	4.2	0.0	0.0	0.5	0.0	0.0	3.7	0.0
Zone 7 Londonderry								
Crescent Link Retail Park, Londonderry	16.7	2.4	0.0	0.0	0.0	0.0	0.0	14.3
Eglinton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Londonderry	10.2	1.3	0.0	0.0	0.0	0.0	0.1	8.8
Other, zone 7 (Londonderry)	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.9
Sub-total	27.8	3.7	0.0	0.0	0.0	0.0	0.1	24.0
Sub Total Study Area (Zones 1 - 7)	84.8	8.9	19.1	10.2	3.6	7.8	8.1	27.1
Others								
Antrim	0.1	0.0	0.0	0.0	0.0	0.1	0.0	0.0
Belfast	1.2	0.1	0.0	0.1	0.0	0.1	0.0	1.0
Braidwater Retail Park, Ballymena	4.5	0.0	0.0	0.1	0.3	3.4	0.7	0.0
Cookstown	1.1	0.0	0.0	0.0	0.0	0.0	1.1	0.0
Enniskillen	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Great Northern Retail Park, Sperrin Drive, Omagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Junction One Retail Park, Antrim	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Laharna Retail Park, Larne	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Larne	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.0
Meadowlane Shopping Centre, Moneymore Road, Magherafelt	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.0
Newtownstewart	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Omagh	0.6	0.0	0.0	0.0	0.0	0.0	0.6	0.0
Orritor Road Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Showgrounds Retail Park, Sedan Avenue, Omagh	0.2	0.0	0.0	0.0	0.0	0.1	0.1	0.0
Station Square Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Strabane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Strabane Retail Park, Branch Road, Strabane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Abroad	0.3	0.0	0.2	0.1	0.0	0.0	0.0	0.0
Other, outside area	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub Total Outside Study Area	8.2	0.1	0.2	0.3	0.4	3.7	2.6	1.0
TOTAL (Rounded)	93.0	9.0	19.3	10.4	4.0	11.5	10.7	28.1

Notes:

- a. Zones based on post code sectors
- b. Market shares for 'main' and 'top-up' shopping derived directly from NEMS Household Survey (October 2016)
- c. Excludes 'don't know/varies', markets and internet sales

Table 21: DIY Goods shopping patterns

Destination	Total DIY (%)	Zone 1 DIY (%)	Zone 2 DIY (%)	Zone 3 DIY (%)	Zone 4 DIY (%)	Zone 5 DIY (%)	Zone 6 DIY (%)	Zone 7 DIY (%)
Study Area								
Zone 1								
Dungiven	0.9	8.4	0.0	0.0	0.0	0.0	0.0	0.0
Limavady	2.4	18.5	0.0	0.0	0.0	0.0	0.0	1.1
Other, zone 1 (Limavady)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	3.3	26.9	0.0	0.0	0.0	0.0	0.0	1.1
Zone 2								
Bushmills	0.7	0.0	1.6	2.2	2.1	0.0	0.0	0.0
Coleraine	7.2	0.9	27.7	9.2	10.2	0.0	0.0	0.0
Kilrea	0.3	0.0	0.0	2.2	0.0	0.0	0.0	0.0
Portrush	0.4	0.0	1.9	0.0	0.0	0.0	0.0	0.0
Portstewart	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Riverside Retail Park, Coleraine	26.1	29.0	67.1	50.2	14.4	6.9	20.0	0.9
Other, zone 2 (Coleraine)	0.2	0.0	0.9	0.0	0.0	0.0	0.0	0.0
Sub-total	34.9	29.9	99.2	63.8	26.7	6.9	20.0	0.9
Zone 3								
Ballymoney	2.0	0.0	0.8	14.5	1.0	0.0	0.0	0.0
Other, zone 3 (Ballymoney)	0.0	0.0	0.0	0.0	0.9	0.0	0.0	0.0
Sub-total	2.0	0.0	0.8	14.5	1.9	0.0	0.0	0.0
Zone 4								
Ballycastle	1.9	0.0	0.0	3.1	32.1	0.0	0.0	0.0
Cushendall	0.2	0.0	0.0	0.0	4.6	0.0	0.0	0.0
Sub-total	2.1	0.0	0.0	3.1	36.8	0.0	0.0	0.0
Sub Total Zones 1 - 4	42.3	56.8	100.0	81.4	65.4	6.9	20.0	2.0
Outside District								
Zone 5								
Ballymena	5.2	0.0	0.0	9.5	21.3	29.9	0.0	0.0
Broughshane	0.8	0.0	0.0	0.0	0.0	7.8	0.0	0.0
Other, zone 5 (Ballemena)	0.7	0.0	0.0	0.0	0.0	6.5	0.0	0.0
Sub-total	6.7	0.0	0.0	9.5	21.3	44.3	0.0	0.0
Zone 6 Magherafelt								
Maghera	1.1	0.0	0.0	0.0	0.0	0.0	12.8	0.0
Magherafelt	3.5	0.0	0.0	0.0	0.0	0.0	42.5	0.0
Other, zone 6 (Magherafelt)	0.1	0.0	0.0	0.0	0.0	0.0	1.4	0.0
Sub-total	4.6	0.0	0.0	0.0	0.0	0.0	56.6	0.0
Zone 7 Londonderry								
Crescent Link Retail Park, Londonderry	20.9	28.5	0.0	0.0	0.0	0.0	0.0	52.8
Eglinton	1.0	0.0	0.0	0.0	0.0	0.0	0.0	3.1
Londonderry	15.1	14.7	0.0	0.0	0.0	0.0	3.9	39.1
Other, zone 7 (Londonderry)	0.4	0.0	0.0	0.0	0.0	0.0	0.0	1.1
Sub-total	37.3	43.2	0.0	0.0	0.0	0.0	3.9	96.1
Sub Total Study Area (Zones 1 - 7)	91.0	100.0	100.0	91.0	86.7	51.1	80.5	98.0
Others								
Antrim	0.4	0.0	0.0	0.0	1.1	3.0	0.0	0.0
Belfast	0.1	0.0	0.0	0.0	1.1	0.9	0.0	0.0
Braidwater Retail Park, Ballymena	5.6	0.0	0.0	8.1	3.0	36.7	8.0	0.0
Cookstown	0.6	0.0	0.0	0.0	0.0	0.0	7.9	0.0
Enniskillen	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Great Northern Retail Park, Sperrin Drive, Omagh	0.1	0.0	0.0	0.0	0.0	0.0	1.1	0.0
Junction One Retail Park, Antrim	0.7	0.0	0.0	0.0	1.9	6.2	0.0	0.0
Laharna Retail Park, Larne	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Larne	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Meadowlane Shopping Centre, Moneymore Road, Magherafelt	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newtownstewart	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Omagh	0.1	0.0	0.0	0.0	0.0	0.0	1.1	0.0
Orritor Road Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Showgrounds Retail Park, Sedan Avenue, Omagh	0.1	0.0	0.0	0.9	0.0	0.0	0.0	0.0
Station Square Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Strabane	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.9
Strabane Retail Park, Branch Road, Strabane	0.5	0.0	0.0	0.0	0.0	0.0	1.3	1.1
Abroad	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other, outside area	0.5	0.0	0.0	0.0	6.4	2.0	0.0	0.0
Sub Total Outside Study Area	9.0	0.0	0.0	9.0	13.4	48.9	19.5	2.0
TOTAL (Rounded)	100	100	100	100	100	100	100	100

Notes:

- a. Zones based on post code sectors
- b. Market shares for 'main' and 'top-up' shopping derived directly from NEMS Household Survey (October 2016)
- c. Excludes 'don't know/varies', markets and internet sales

Table 22: DIY Goods shopping patterns

Destination	Total DIY (£m)	Zone 1 DIY (£m)	Zone 2 DIY (£m)	Zone 3 DIY (£m)	Zone 4 DIY (£m)	Zone 5 DIY (£m)	Zone 6 DIY (£m)	Zone 7 DIY (£m)
Study Area								
Zone 1								
Dungiven	0.5	0.5	0.0	0.0	0.0	0.0	0.0	0.0
Limavady	1.2	1.1	0.0	0.0	0.0	0.0	0.0	0.2
Other, zone 1 (Limavady)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	1.7	1.5	0.0	0.0	0.0	0.0	0.0	0.2
Zone 2								
Bushmills	0.4	0.0	0.2	0.2	0.1	0.0	0.0	0.0
Coleraine	4.3	0.1	3.3	0.7	0.3	0.0	0.0	0.0
Kilrea	0.2	0.0	0.0	0.2	0.0	0.0	0.0	0.0
Portrush	0.2	0.0	0.2	0.0	0.0	0.0	0.0	0.0
Portstewart	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Riverside Retail Park, Coleraine	15.9	1.7	8.0	3.7	0.4	0.5	1.5	0.1
Other, zone 2 (Coleraine)	0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0
Sub-total	21.1	1.7	11.7	4.7	0.7	0.5	1.5	0.1
Zone 3								
Ballymoney	1.2	0.0	0.1	1.1	0.0	0.0	0.0	0.0
Other, zone 3 (Ballymoney)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	1.2	0.0	0.1	1.1	0.1	0.0	0.0	0.0
Zone 4								
Ballycastle	1.1	0.0	0.0	0.2	0.8	0.0	0.0	0.0
Cushendall	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.0
Sub-total	1.2	0.0	0.0	0.2	1.0	0.0	0.0	0.0
Sub Total Zones 1 - 4	25.2	3.3	11.8	6.0	1.7	0.5	1.5	0.3
Outside District								
Zone 5								
Ballymena	3.5	0.0	0.0	0.7	0.6	2.2	0.0	0.0
Broughshane	0.6	0.0	0.0	0.0	0.0	0.6	0.0	0.0
Other, zone 5 (Ballemena)	0.5	0.0	0.0	0.0	0.0	0.5	0.0	0.0
Sub-total	4.5	0.0	0.0	0.7	0.6	3.2	0.0	0.0
Zone 6 Magherafelt								
Maghera	1.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0
Magherafelt	3.3	0.0	0.0	0.0	0.0	0.0	3.3	0.0
Other, zone 6 (Magherafelt)	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.0
Sub-total	4.4	0.0	0.0	0.0	0.0	0.0	4.4	0.0
Zone 7 Londonderry								
Crescent Link Retail Park, Londonderry	10.0	1.6	0.0	0.0	0.0	0.0	0.0	8.3
Eglinton	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.5
Londonderry	7.3	0.8	0.0	0.0	0.0	0.0	0.3	6.2
Other, zone 7 (Londonderry)	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.2
Sub-total	17.9	2.5	0.0	0.0	0.0	0.0	0.3	15.1
Sub Total Study Area (Zones 1 - 7)	52.0	5.7	11.8	6.7	2.3	3.7	6.2	15.4
Others								
Antrim	0.3	0.0	0.0	0.0	0.0	0.2	0.0	0.0
Belfast	0.1	0.0	0.0	0.0	0.0	0.1	0.0	0.0
Braidwater Retail Park, Ballymena	4.0	0.0	0.0	0.6	0.1	2.7	0.6	0.0
Cookstown	0.6	0.0	0.0	0.0	0.0	0.0	0.6	0.0
Enniskillen	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Great Northern Retail Park, Sperrin Drive, Omagh	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.0
Junction One Retail Park, Antrim	0.5	0.0	0.0	0.0	0.1	0.5	0.0	0.0
Laharna Retail Park, Larne	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Larne	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Meadowlane Shopping Centre, Moneymore Road, Magherafelt	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newtownstewart	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Omagh	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.0
Orritor Road Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Showgrounds Retail Park, Sedan Avenue, Omagh	0.1	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Station Square Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Strabane	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Strabane Retail Park, Branch Road, Strabane	0.3	0.0	0.0	0.0	0.0	0.0	0.1	0.2
Abroad	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other, outside area	0.3	0.0	0.0	0.0	0.2	0.1	0.0	0.0
Sub Total Outside Study Area	6.4	0.0	0.0	0.7	0.4	3.6	1.5	0.3
TOTAL (Rounded)	58.4	5.7	11.8	7.4	2.6	7.3	7.7	15.7

Notes:

- a. Zones based on post code sectors
- b. Market shares for 'main' and 'top-up' shopping derived directly from NEMS Household Survey (October 2016)
- c. Excludes 'don't know/varies', markets and internet sales

Table 23: Furniture Goods shopping patterns

Destination	Total Furniture (%)	Zone 1 Furniture (%)	Zone 2 Furniture (%)	Zone 3 Furniture (%)	Zone 4 Furniture (%)	Zone 5 Furniture (%)	Zone 6 Furniture (%)	Zone 7 Furniture (%)
Study Area								
Zone 1								
Dungiven	0.4	3.8	0.0	0.0	0.0	0.0	0.0	0.0
Limavady	2.0	21.4	0.0	0.0	0.0	0.0	0.0	0.0
Other, zone 1 (Limavady)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	2.4	25.2	0.0	0.0	0.0	0.0	0.0	0.0
Zone 2								
Bushmills	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Coleraine	12.3	9.6	53.9	8.9	8.5	0.0	2.8	1.1
Kilrea	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Portrush	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Portstewart	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Riverside Retail Park, Coleraine	9.0	19.8	22.7	10.9	16.6	0.0	8.1	0.9
Other, zone 2 (Coleraine)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	21.3	29.5	76.6	19.9	25.1	0.0	10.9	2.0
Zone 3								
Ballymoney	6.9	0.0	14.0	33.6	1.1	0.0	3.3	0.0
Other, zone 3 (Ballymoney)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	6.9	0.0	14.0	33.6	1.1	0.0	3.3	0.0
Zone 4								
Ballycastle	2.1	0.0	0.0	6.0	27.8	0.0	0.0	0.0
Cushendall	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	2.1	0.0	0.0	6.0	27.8	0.0	0.0	0.0
Sub Total Zones 1 - 4	32.7	54.6	90.5	59.5	53.9	0.0	14.2	2.0
Outside District								
Zone 5								
Ballymena	14.1	1.1	6.2	21.4	30.0	78.1	5.9	0.0
Broughshane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other, zone 5 (Ballemena)	0.6	0.0	0.0	0.0	0.0	5.8	0.0	0.0
Sub-total	14.7	1.1	6.2	21.4	30.0	83.9	5.9	0.0
Zone 6 Magherafelt								
Maghera	1.2	0.0	0.0	0.0	0.0	0.0	14.0	0.0
Magherafelt	2.8	1.1	1.0	0.0	0.0	0.0	28.0	0.0
Other, zone 6 (Magherafelt)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	4.0	1.1	1.0	0.0	0.0	0.0	42.0	0.0
Zone 7 Londonderry								
Crescent Link Retail Park, Londonderry	12.3	12.0	0.0	0.0	0.0	0.0	0.0	30.5
Eglinton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Londonderry	20.8	26.6	0.0	0.0	1.1	0.0	0.0	49.8
Other, zone 7 (Londonderry)	3.1	0.0	0.0	0.0	0.0	0.0	0.0	8.6
Sub-total	36.2	38.6	0.0	0.0	1.1	0.0	0.0	88.9
Sub Total Study Area (Zones 1 - 7)	87.7	95.4	97.8	80.9	85.0	83.9	62.1	90.9
Others								
Antrim	0.1	0.0	0.0	0.0	0.0	1.1	0.0	0.0
Belfast	4.6	3.6	1.2	14.9	8.8	3.4	0.0	3.9
Braidwater Retail Park, Ballymena	1.0	0.0	0.0	1.8	2.9	5.7	0.0	0.0
Cookstown	1.9	0.0	1.0	0.0	0.0	0.0	19.1	0.0
Enniskillen	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Great Northern Retail Park, Sperrin Drive, Omagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Junction One Retail Park, Antrim	0.6	0.0	0.0	0.0	0.0	5.8	0.0	0.0
Laharna Retail Park, Larne	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Larne	0.1	0.0	0.0	0.0	1.1	0.0	0.0	0.0
Meadowlane Shopping Centre, Moneymore Road, Magherafelt	0.1	0.9	0.0	0.0	0.0	0.0	0.0	0.0
Newtownstewart	0.4	0.0	0.0	0.0	0.0	0.0	4.1	0.0
Omagh	0.6	0.0	0.0	0.0	0.0	0.0	6.4	0.0
Orritor Road Retail Park, Cookstown	0.6	0.0	0.0	0.0	0.0	0.0	7.0	0.0
Showgrounds Retail Park, Sedan Avenue, Omagh	0.1	0.0	0.0	0.0	0.0	0.0	1.4	0.0
Station Square Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Strabane	1.1	0.0	0.0	0.0	0.0	0.0	0.0	3.1
Strabane Retail Park, Branch Road, Strabane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Abroad	0.1	0.0	0.0	0.0	1.1	0.0	0.0	0.0
Other, outside area	1.1	0.0	0.0	2.4	1.1	0.0	0.0	2.2
Sub Total Outside Study Area	12.3	4.6	2.2	19.1	15.0	16.1	37.9	9.1
TOTAL (Rounded)	100	100	100	100	100	100	100	100

Notes:

- a. Zones based on post code sectors
- b. Market shares for 'main' and 'top-up' shopping derived directly from NEMS Household Survey (October 2016)
- c. Excludes 'don't know/varies', markets and internet sales

Table 24: Furniture Goods shopping patterns

Destination	Total Furniture (£m)	Zone 1 Furniture (£m)	Zone 2 Furniture (£m)	Zone 3 Furniture (£m)	Zone 4 Furniture (£m)	Zone 5 Furniture (£m)	Zone 6 Furniture (£m)	Zone 7 Furniture (£m)
Study Area								
Zone 1								
Dungiven	0.2	0.2	0.0	0.0	0.0	0.0	0.0	0.0
Limavady	1.2	1.2	0.0	0.0	0.0	0.0	0.0	0.0
Other, zone 1 (Limavady)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	1.4	1.4	0.0	0.0	0.0	0.0	0.0	0.0
Zone 2								
Bushmills	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Coleraine	7.9	0.5	6.2	0.6	0.2	0.0	0.2	0.2
Kilrea	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Portrush	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Portstewart	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Riverside Retail Park, Coleraine	5.5	1.1	2.6	0.7	0.4	0.0	0.6	0.2
Other, zone 2 (Coleraine)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	13.4	1.6	8.8	1.3	0.6	0.0	0.7	0.3
Zone 3								
Ballymoney	4.1	0.0	1.6	2.2	0.0	0.0	0.2	0.0
Other, zone 3 (Ballymoney)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	4.1	0.0	1.6	2.2	0.0	0.0	0.2	0.0
Zone 4								
Ballycastle	1.1	0.0	0.0	0.4	0.7	0.0	0.0	0.0
Cushendall	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	1.1	0.0	0.0	0.4	0.7	0.0	0.0	0.0
Sub Total Zones 1 - 4	20.0	2.9	10.4	4.0	1.3	0.0	1.0	0.3
Outside District								
Zone 5								
Ballymena	8.8	0.1	0.7	1.4	0.7	5.5	0.4	0.0
Broughshane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other, zone 5 (Ballymena)	0.4	0.0	0.0	0.0	0.0	0.4	0.0	0.0
Sub-total	9.2	0.1	0.7	1.4	0.7	5.9	0.4	0.0
Zone 6 Magherafelt								
Maghera	1.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0
Magherafelt	2.1	0.1	0.1	0.0	0.0	0.0	1.9	0.0
Other, zone 6 (Magherafelt)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	3.0	0.1	0.1	0.0	0.0	0.0	2.9	0.0
Zone 7 Londonderry								
Crescent Link Retail Park, Londonderry	5.8	0.6	0.0	0.0	0.0	0.0	0.0	5.1
Eglinton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Londonderry	9.8	1.4	0.0	0.0	0.0	0.0	0.0	8.4
Other, zone 7 (Londonderry)	1.4	0.0	0.0	0.0	0.0	0.0	0.0	1.4
Sub-total	17.0	2.1	0.0	0.0	0.0	0.0	0.0	14.9
Sub Total Study Area (Zones 1 - 7)	49.3	5.2	11.3	5.4	2.1	5.9	4.2	15.2
Others								
Antrim	0.1	0.0	0.0	0.0	0.0	0.1	0.0	0.0
Belfast	2.4	0.2	0.1	1.0	0.2	0.2	0.0	0.6
Braidwater Retail Park, Ballymena	0.6	0.0	0.0	0.1	0.1	0.4	0.0	0.0
Cookstown	1.4	0.0	0.1	0.0	0.0	0.0	1.3	0.0
Enniskillen	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Great Northern Retail Park, Sperrin Drive, Omagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Junction One Retail Park, Antrim	0.4	0.0	0.0	0.0	0.0	0.4	0.0	0.0
Laharna Retail Park, Larne	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Larne	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Meadowlane Shopping Centre, Moneymore Road, Magherafelt	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0
Newtownstewart	0.3	0.0	0.0	0.0	0.0	0.0	0.3	0.0
Omagh	0.4	0.0	0.0	0.0	0.0	0.0	0.4	0.0
Orritor Road Retail Park, Cookstown	0.5	0.0	0.0	0.0	0.0	0.0	0.5	0.0
Showgrounds Retail Park, Sedan Avenue, Omagh	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.0
Station Square Retail Park, Cookstown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Strabane	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.5
Strabane Retail Park, Branch Road, Strabane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Abroad	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other, outside area	0.5	0.0	0.0	0.2	0.0	0.0	0.0	0.4
Sub Total Outside Study Area	7.4	0.2	0.3	1.3	0.4	1.1	2.6	1.5
TOTAL (Rounded)	56.7	5.4	11.5	6.7	2.4	7.0	6.8	16.8

Notes:

- a. Zones based on post code sectors
- b. Market shares for 'main' and 'top-up' shopping derived directly from NEMS Household Survey (October 2016)
- c. Excludes 'don't know/varies', markets and internet sales

Table 25: Total Comparison Goods expenditure

Destination	Total Comparison (£m)	Total Comparison (%)	Zone 1 Comparison (£m)	Zone 2 Comparison (£m)	Zone 3 Comparison (£m)	Zone 4 Comparison (£m)	Zone 1-4 Comparison (£m)	Zone 5 Comparison (£m)	Zone 6 Comparison (£m)	Zone 7 Comparison (£m)	Inflow Comparison (£m)
Study Area											
Zone 1											
Dungiven	1.5	0.1%	1.5	0.0	0.0	0.0	1.5	0.0	0.0	0.0	0.0
Limavady	29.6	3.0%	19.5	4.1	0.0	0.0	23.7	0.0	0.0	5.9	0.0
Other, zone 1 (Limavady)	0.4	0.0%	0.2	0.0	0.0	0.0	0.2	0.0	0.0	0.1	0.0
Sub-total	31.5	3.2%	21.3	4.1	0.0	0.0	25.4	0.0	0.0	6.1	0.0
Zone 2											
Bushmills	0.7	0.1%	0.0	0.5	0.2	0.1	0.7	0.0	0.0	0.0	0.0
Coleraine	155.0	15.8%	8.1	107.1	17.8	7.2	140.2	0.8	5.2	8.8	7.7
Kilrea	3.9	0.4%	0.1	2.9	0.5	0.0	3.4	0.0	0.4	0.0	0.0
Portrush	2.7	0.3%	0.0	2.7	0.0	0.0	2.7	0.0	0.0	0.0	0.3
Portstewart	1.4	0.1%	0.0	1.0	0.4	0.0	1.4	0.0	0.0	0.0	0.1
Riverside Retail Park, Coleraine	83.8	8.5%	7.5	40.5	17.7	4.7	70.4	0.6	10.0	2.8	0.0
Other, zone 2 (Coleraine)	0.7	0.1%	0.0	0.7	0.0	0.0	0.7	0.0	0.0	0.0	0.0
Sub-total	248.2	25.3%	15.7	155.4	36.5	12.0	219.6	1.4	15.7	11.6	8.2
Zone 3											
Ballymoney	30.6	3.1%	0.2	7.1	21.0	0.9	29.2	0.8	0.6	0.0	0.0
Other, zone 3 (Ballymoney)	0.9	0.1%	0.0	0.0	0.6	0.0	0.6	0.3	0.0	0.0	0.0
Sub-total	31.5	3.2%	0.2	7.1	21.6	0.9	29.7	1.1	0.6	0.0	0.0
Zone 4											
Ballycastle	9.2	0.9%	0.0	0.0	1.6	7.5	9.2	0.0	0.0	0.0	0.9
Cushendall	0.3	0.0%	0.0	0.0	0.0	0.3	0.3	0.0	0.0	0.0	0.0
Sub-total	9.4	1.0%	0.0	0.0	1.6	7.8	9.4	0.0	0.0	0.0	0.9
Sub Total Zones 1 - 4	320.5	32.6%	37.1	166.6	59.7	20.8	284.1	2.5	16.3	17.6	9.1
Outside District											
Zone 5											
Ballymena	177.1	18.0%	1.7	16.1	39.9	16.1		81.1	22.2	0.0	0.0
Broughshane	2.0	0.2%	0.0	0.0	0.0	0.0		1.9	0.0	0.0	0.0
Other, zone 5 (Ballymena)	1.8	0.2%	0.0	0.0	0.0	0.0		1.8	0.0	0.0	0.0
Sub-total	180.9	18.4%	1.7	16.1	39.9	16.1	73.8	84.9	22.2	0.0	0.0
Zone 6											
Maghera	7.2	0.7%	0.0	0.0	0.0	0.0		0.0	7.2	0.0	0.0
Magherafelt	25.6	2.6%	0.7	1.6	0.0	0.0		0.3	23.1	0.0	0.0
Other, zone 6 (Magherafelt)	2.3	0.2%	0.0	0.0	0.8	0.0		0.0	1.6	0.0	0.0
Sub-total	35.1	3.6%	0.7	1.6	0.8	0.0	3.0	0.3	31.9	0.0	0.0
Zone 7											
Crescent Link Retail Park, Londonderry	68.7	7.0%	15.9	0.0	0.0	0.0		0.0	0.0	52.8	0.0
Eglinton	1.3	0.1%	0.0	0.0	0.0	0.0		0.0	0.0	1.3	0.0
Londonderry	241.2	24.6%	36.3	0.5	0.0	0.1		0.3	2.7	201.3	0.0
Other, zone 7 (Londonderry)	4.0	0.4%	0.1	0.0	0.0	0.0		0.0	0.0	3.9	0.0
Sub-total	315.2	32.1%	52.3	0.5	0.0	0.1	52.8	0.3	2.7	259.4	0.0
Sub Total Study Area (Zones 1 - 7)	851.7	86.7%	91.7	184.7	100.4	36.9	413.8	88.0	73.0	277.0	
Others											
Antrim	1.7	0.2%	0.0	0.6	0.0	0.3		0.8	0.0	0.0	0.0
Belfast	50.4	5.1%	2.2	5.3	9.6	2.2		11.5	9.4	10.2	0.0
Braidwater Retail Park, Ballymena	25.0	2.5%	1.3	0.0	4.4	1.2		16.4	1.7	0.0	0.0
Cookstown	18.8	1.9%	0.2	0.1	0.0	0.0		0.3	18.2	0.0	0.0
Enniskillen	0.0	0.0%	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0
Great Northern Retail Park, Sperrin Drive, Omagh	0.1	0.0%	0.0	0.0	0.0	0.0		0.0	0.1	0.0	0.0
Junction One Retail Park, Antrim	5.9	0.6%	0.0	2.6	0.0	0.5		1.6	0.0	1.3	0.0
Laharna Retail Park, Larne	0.0	0.0%	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0
Larne	0.4	0.0%	0.0	0.0	0.0	0.3		0.2	0.0	0.0	0.0
Meadowlane Shopping Centre, Moneymore Road, Magherafelt	0.2	0.0%	0.1	0.0	0.0	0.0		0.0	0.1	0.0	0.0
Newtownstewart	1.6	0.2%	0.0	0.2	0.0	0.0		0.0	1.4	0.0	0.0
Omagh	8.4	0.9%	0.0	0.0	0.0	0.0		0.0	7.3	1.1	0.0
Orritor Road Retail Park, Cookstown	0.9	0.1%	0.0	0.0	0.0	0.0		0.0	0.9	0.0	0.0
Showgrounds Retail Park, Sedan Avenue, Omagh	2.4	0.2%	0.0	0.0	0.1	0.0		0.1	2.2	0.0	0.0
Station Square Retail Park, Cookstown	0.3	0.0%	0.0	0.0	0.0	0.0		0.0	0.3	0.0	0.0
Strabane	8.6	0.9%	0.0	1.3	0.0	0.0		0.0	2.0	5.2	0.0
Strabane Retail Park, Branch Road, Strabane	0.3	0.0%	0.0	0.0	0.0	0.0		0.0	0.1	0.2	0.0
Abroad	1.6	0.2%	0.2	0.8	0.1	0.3		0.2	0.2	0.0	0.0
Other, outside area	3.7	0.4%	0.0	0.6	0.2	0.3		0.4	0.3	1.9	0.0
Sub Total Outside Study Area	130.2	13.3%	3.9	11.5	14.3	5.2	34.8	31.4	44.1	19.8	0.0
TOTAL (Rounded)	981.9	100%	95.6	196.2	114.7	42.1	448.6	119.4	117.1	296.8	0.0

Notes:

- a. Zones based on post code sectors
- b. Market shares for 'main' and 'top-up' shopping derived directly from NEMS Household Survey (October 2016)
- c. Excludes 'don't know/varies', markets and internet sales
- d. Inflow assessment based on market shares derived from professional judgment

Table 26a: Estimated 'capacity' for new comparison goods facilities in Causeway Coast & Glens

Year	Total Borough Turnover (£m) ¹	Turnover from Zones 1-4 (£m) ²	Inflow from beyond Zones 1-4 (£m)	Surplus Expenditure (£m)
2020	329.6	284.1	45.5	0.0
2025	387.3	319.1	51.1	-17.1
2030	444.7	359.7	57.5	-27.4
2035	508.0	411.8	65.9	-30.4
Zone 1-4 Market Share (%)		63.3%		

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 17 (February 2020)

2. Assumes constant market share claimed by Causeway Coast & Glens facilities at 63.3% from Zones 1-4

2018 Prices

Table 26b: Gross quantitative capacity for additional comparison goods floorspace in Causeway Coast & Glens

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq m net)	
		Min ¹	Max ²
2020	0.0	0	0
2025	-17.1	-2,500	-3,900
2030	-27.4	-3,400	-5,400
2035	-30.4	-3,300	-5,200

1. Average sales density assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved in Causeway Coast & Glens Borough

2. Average sales density assumed to be £3,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved in Causeway Coast & Glens Borough

3. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 17 (February 2020)

2018 Prices

Table 26c: Extant comparison goods commitments in Causeway Coast & Glens

Destination	Reference	Proposal	Net Comparison Floorspace (sq m)	Estimated Sales Density (£/sq m)	Estimated Comparison Turnover (£m)	Status
7 Lodge Road Coleraine	LA01/2018/1255/F	Change of use from a Solicitors Office to a Bridal Shop	207	4,500	0.9	Permission granted 2018
Lands of former Market Yard located to rear of nos. 43-79 Catherine Street and rear of nos. 24-48 Linenhall Street and bounded by the River Roe to the West Limavady.	LA01/2017/1250/F	Retail unit with associated car parking, service yard, landscaping and retention of bank, site levelling works, access roads with entrance/egress from/to Catherine Street/Linenhall Street and associated site works.	754 convenience / 546 comparison	4,500	2.5	Permission granted 2019
Lands between rear of 11-39 Main Street and Sheils Court and rear of 16-26 Charlotte Street Ballymoney	LA01/2016/1146/F	New retail unit with car parking, service yard, access road, site access, boundary treatments and associated site works	568 convenience / 378 comparison	4,500	1.7	Permission granted 2017
Lands incorporating Nos 18-24 and No 34 Meeting House Street Ballymoney	LA01/2018/0549/F	Construction of discount foodstore, provision of car parking, landscaping and associated site works	1,136 convenience / 284 comparison	4,949	1.4	Permission granted 2019
Site adjacent to the Masonic Hall Dunluce Avenue Portrush	LA01/2017/0547/F	Proposed redevelopment of site (previously approved for 2 no. retail units and 19 no. apartments) to comprise of 1 no. ground floor café unit and 1 no. retail unit and 13 no. apartments with associated communal open space, underground car parking and associated site and landscaping works.	215	4,500	1.0	Permission granted 2018
Former Portrush Train Station 16C Eglinton Street Portrush	LA01/2018/1436/F	Proposed Planning Application for a Material Change of Use from former Bar/Nightclub to 1 No. Retail Unit. Works include proposed remedial works to external and internal fabric of the existing building. Including repairs to existing brickwork and timer facades and re-covering of barrel roofs and proposed new ATM unit. (amended plans)	362	4,500	1.6	Permission granted 2019
67-69 the Promenade and 30-38 Church Street Portstewart	LA01/2016/1245/F	Amendments to extant approval LA01/2015/0373/F for mixed use development of 67-69 The Promenade and 30-38 Church Street, Portstewart to include relocation of café unit, additional bin store, rear exit from car lift, minor amendments to elevations, fenestration patterns and internal layouts	592	4,500	2.7	Permission granted 2017
Total			2584		11.8	

1. Sales density assumed to be £4,500 based on Nexus Planning judgement where the occupier has not been referenced within the application.

2018 prices

Table 26d: Net quantitative capacity for additional comparison goods floorspace in Causeway Coast & Glens

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2020	0.0	11.8	-11.8	-2,000	-3,100
2025	-17.1	13.8	-30.9	-4,500	-7,000
2030	-27.4	15.9	-43.3	-5,400	-8,500
2035	-30.4	18.1	-48.5	-5,300	-8,400

1. Residual calculated by subtracting turnover of commitments (sourced from Table 26c) from surplus expenditure (sourced from Table 26a)

2. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 17 (February 2020)

2018 prices

Table 26e: Estimated 'capacity' for new comparison goods facilities in Coleraine

Year	Total Borough Turnover (£m) ¹	Turnover from Zones 1-4 (£m) ²	Inflow from beyond Zones 1-4 (£m)	Surplus Expenditure (£m)
2020	247.2	211.3	35.9	0.0
2025	290.5	237.3	40.3	-12.8
2030	333.5	267.4	45.5	-20.6
2035	381.0	306.1	52.0	-22.8
Zone 1-4 Market Share (%)		47.1%		

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 17 (February 2020)

2. Assumes constant market share claimed by Coleraine facilities at 47.1% from Zones 1-4

2018 Prices

Table 26f: Gross quantitative capacity for additional comparison goods floorspace in Coleraine

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq m net)	
		Min ¹	Max ²
2020	0.0	0	0
2025	-12.8	-1,800	-2,900
2030	-20.6	-2,600	-4,100
2035	-22.8	-2,500	-3,900

1. Average sales density assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved in Causeway Coast & Glens Borough

2. Average sales density assumed to be £3,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved in Causeway Coast & Glens Borough

3. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 14 (November 2016)

2018 Prices

Table 26g: Extant comparison goods commitments in Coleraine

Destination	Reference	Proposal	Net Comparison Floorspace (sq m)	Estimated Sales Density (£/sq m)	Estimated Comparison Turnover (£m)	Status
7 Lodge Road Coleraine	LA01/2018/1255/F	Change of use from a Solicitors Office to a Bridal Shop	207	4,500	0.9	Permission granted 2018
Total			207		0.9	

1. Sales density assumed to be £4,500 based on Nexus Planning judgement where the occupier has not been referenced within the application.

2018 prices

Table 26h: Net quantitative capacity for additional comparison goods floorspace in Coleraine

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2020	0.0	0.9	-0.9	-200	-200
2025	-12.8	1.1	-13.9	-2,000	-3,200
2030	-20.6	1.3	-21.8	-2,700	-4,300
2035	-22.8	1.4	-24.2	-2,700	-4,200

1. Residual calculated by subtracting turnover of commitments (sourced from Table 26g) from surplus expenditure (sourced from Table 26e)

2. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 17 (February 2020)

2018 prices

Table 26i: Estimated 'capacity' for new comparison goods facilities in Limavady

Year	Total Borough Turnover (£m) ¹	Turnover from Zones 1-4 (£m) ²	Inflow from beyond Zones 1-4 (£m)	Surplus Expenditure (£m)
2020	30.0	23.9	6.1	0.0
2025	35.2	26.9	6.8	-1.6
2030	40.5	30.3	7.7	-2.5
2035	46.2	34.7	8.8	-2.8
Zone 1-4 Market Share (%)		5.3%		

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 17 (February 2020)

2. Assumes constant market share claimed by Limavady facilities at 5.3% from Zones 1-4

2018 Prices

Table 26j: Gross quantitative capacity for additional comparison goods floorspace in Limavady

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq m net)	
		Min ¹	Max ²
2020	0.0	0	0
2025	-1.6	-200	-400
2030	-2.5	-300	-500
2035	-2.8	-300	-500

1. Average sales density assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved in Causeway Coast & Glens Borough

2. Average sales density assumed to be £3,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved in Causeway Coast & Glens Borough

3. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 17 (February 2020)

2018 Prices

Table 26k: Extant comparison goods commitments in Limavady

Destination	Reference	Proposal	Net Comparison Floorspace (sq m)	Estimated Sales Density (£/sq m)	Estimated Comparison Turnover (£m)	Status
Lands of former Market Yard located to rear of nos. 43-79 Catherine Street and rear of nos. 24-48 Linenhall Street and bounded by the River Roe to the West Limavady.	LA01/2017/1250/F	Retail unit with associated car parking, service yard, landscaping and retention of bank, site levelling works, access roads with entrance/egress from/to Catherine Street/Linenhall Street and associated site works.	754 convenience / 546 comparison	4,500	2.5	Permission granted 2019
Total			546		2.5	

1. Sales density assumed to be £4,500 based on Nexus Planning judgement where the occupier has not been referenced within the application.

2018 prices

Table 26l: Net quantitative capacity for additional comparison goods floorspace in Limavady

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2020	0.0	2.5	-2.5	-400	-700
2025	-1.6	2.9	-4.5	-600	-1,000
2030	-2.5	3.3	-5.8	-700	-1,200
2035	-2.8	3.8	-6.6	-700	-1,100

1. Residual calculated by subtracting turnover of commitments (sourced from Table 26k) from surplus expenditure (sourced from Table 26i)

2. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 17 (February 2020)

2018 prices

Table 26m: Estimated 'capacity' for new comparison goods facilities in Ballymoney

Year	Total Borough Turnover (£m) ¹	Turnover from Zones 1-4 (£m) ²	Inflow from beyond Zones 1-4 (£m)	Surplus Expenditure (£m)
2020	31.5	29.7	1.7	0.0
2025	37.0	33.4	1.9	-1.6
2030	42.4	37.7	2.2	-2.6
2035	48.5	43.1	2.5	-2.9
Zone 1-4 Market Share (%)		6.6%		

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 17 (February 2020)

2. Assumes constant market share claimed by Ballymoney facilities at 6.6% from Zones 1-4

2018 Prices

Table 26n: Gross quantitative capacity for additional comparison goods floorspace in Ballymoney

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq m net)	
		Min ¹	Max ²
2020	0.0	0	0
2025	-1.6	-200	-400
2030	-2.6	-300	-500
2035	-2.9	-300	-500

1. Average sales density assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved in Causeway Coast & Glens Borough

2. Average sales density assumed to be £3,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved in Causeway Coast & Glens Borough

3. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 17 (February 2020)

2018 Prices

Table 26o: Extant comparison goods commitments in Ballymoney

Destination	Reference	Proposal	Net Comparison Floorspace (sq m)	Estimated Sales Density (£/sq m)	Estimated Comparison Turnover (£m)	Status
Lands between rear of 11-39 Main Street and Shells Court and rear of 16-26 Charlotte Street Ballymoney	LA01/2016/1146/F	New retail unit with car parking, service yard, access road, site access, boundary treatments and associated site works	568 convenience / 378 comparison	4,500	1.7	Permission granted 2017
Lands incorporating Nos 18-24 and No 34 Meeting House Street Ballymoney	LA01/2018/0549/F	Construction of discount foodstore, provision of car parking, landscaping and associated site works	1,136 convenience / 284 comparison	4,949	1.4	Permission granted 2019
Total			662		3.1	

1. Sales density assumed to be £4,500 based on Nexus Planning judgement where the occupier has not been referenced within the application.

2018 prices

Table 26p: Net quantitative capacity for additional comparison goods floorspace in Ballymoney

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2020	0.0	3.1	-3.1	-500	-800
2025	-1.6	3.7	-5.3	-800	-1,200
2030	-2.6	4.2	-6.8	-900	-1,400
2035	-2.9	4.8	-7.7	-800	-1,300

1. Residual calculated by subtracting turnover of commitments (sourced from Table 26o) from surplus expenditure (sourced from Table 26m)

2. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 17 (February 2020)

2018 prices

Table 26q: Estimated 'capacity' for new comparison goods facilities in Ballycastle

Year	Total Borough Turnover (£m) ¹	Turnover from Zones 1-4 (£m) ²	Inflow from beyond Zones 1-4 (£m)	Surplus Expenditure (£m)
2020	10.1	9.2	0.9	0.0
2025	11.8	10.3	1.0	-0.5
2030	13.6	11.6	1.2	-0.8
2035	15.5	13.3	1.3	-0.9
Zone 1-4 Market Share (%)		2.0%		

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 17 (February 2020)

2. Assumes constant market share claimed by Ballycastle facilities at 2.0% from Zones 1-4

2018 Prices

Table 26r: Gross quantitative capacity for additional comparison goods floorspace in Ballycastle

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq m net)	
		Min ¹	Max ²
2020	0.0	0	0
2025	-0.5	-100	-100
2030	-0.8	-100	-200
2035	-0.9	-100	-200

1. Average sales density assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved in Causeway Coast & Glens Borough

2. Average sales density assumed to be £3,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved in Causeway Coast & Glens Borough

3. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 17 (February 2020)

2018 Prices

Table 26s: Extant comparison goods commitments in Ballycastle

Destination	Reference	Proposal	Net Comparison Floorspace (sq m)	Estimated Sales Density (£/sq m)	Estimated Comparison Turnover (£m)	Status
Total			0		0.0	

1. Sales density assumed to be £4,500 based on Nexus Planning judgement where the occupier has not been referenced within the application.

2018 prices

Table 26t: Net quantitative capacity for additional comparison goods floorspace in Ballycastle

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2020	0.0	0.0	0.0	0	0
2025	-0.5	0.0	-0.5	-100	-100
2030	-0.8	0.0	-0.8	-100	-200
2035	-0.9	0.0	-0.9	-100	-200

1. Residual calculated by subtracting turnover of commitments (sourced from Table 26s) from surplus expenditure (sourced from Table 26q)

2. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 17 (February 2020)

2018 prices

Table 26u: Estimated 'capacity' for new comparison goods facilities in Portrush

Year	Total Borough Turnover (£m) ¹	Turnover from Zones 1-4 (£m) ²	Inflow from beyond Zones 1-4 (£m)	Surplus Expenditure (£m)
2020	3.0	2.7	0.3	0.0
2025	3.6	3.1	0.3	-0.2
2030	4.1	3.5	0.3	-0.3
35	4.7	4.0	0.4	-0.3
Zone 1-4 Market Share (%)	0.6%			

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 17 (February 2020)

2. Assumes constant market share claimed by Portrush facilities at 0.6% from Zones 1-4

2018 Prices

Table 26v: Gross quantitative capacity for additional comparison goods floorspace in Portrush

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq m net)	
		Min ¹	Max ²
2020	0.0	0	0
2025	-0.2	0	0
2030	-0.3	0	0
2035	-0.3	0	0

1. Average sales density assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved in Causeway Coast & Glens Borough

2. Average sales density assumed to be £3,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved in Causeway Coast & Glens Borough

3. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 17 (February 2020)

2018 Prices

Table 26w: Extant comparison goods commitments in Portrush

Destination	Reference	Proposal	Net Comparison Floorspace (sq m)	Estimated Sales Density (£/sq m)	Estimated Comparison Turnover (£m)	Status
Site adjacent to the Masonic Hall Dunluce Avenue Portrush	LA01/2017/0547/F	Proposed redevelopment of site (previously approved for 2 no. retail units and 19 no. apartments) to comprise of 1 no. ground floor café unit and 1 no. retail unit and 13 no. apartments with associated communal open space, underground car parking and associated site and landscaping works.	215	4,500	1.0	Permission granted 2018
Former Portrush Train Station 16C Eglinton Street Portrush	LA01/2018/1436/F	Proposed Planning Application for a Material Change of Use from former Bar/Nightclub to 1 No. Retail Unit. Works include proposed remedial works to external and internal fabric of the existing building. Including repairs to existing brickwork and timer facades and re-covering of barrel roofs and proposed new ATM unit. (amended plans)	362	4,500	1.6	Permission granted 2019
Total			577		2.6	

1. Sales density assumed to be £4,500 based on Nexus Planning judgement where the occupier has not been referenced within the application.

2018 prices

Table 26y: Net quantitative capacity for additional comparison goods floorspace in Portrush

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2020	0.0	2.6	-2.6	-400	-700
2025	-0.2	3.1	-3.2	-500	-700
2030	-0.3	3.5	-3.8	-500	-700
2035	-0.3	4.0	-4.3	-500	-700

1. Residual calculated by subtracting turnover of commitments (sourced from Table 26w) from surplus expenditure (sourced from Table 26u)

2. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 17 (February 2020)

2018 prices

Table 26x: Estimated 'capacity' for new comparison goods facilities in Portstewart

Year	Total Borough Turnover (£m) ¹	Turnover from Zones 1-4 (£m) ²	Inflow from beyond Zones 1-4 (£m)	Surplus Expenditure (£m)
2020	1.5	1.4	0.1	0.0
2025	1.8	1.6	0.2	-0.1
2030	2.1	1.8	0.2	-0.1
2035	2.4	2.0	0.2	-0.1
Zone 1-4 Market Share (%)	0.3%			

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 17 (February 2020)

2. Assumes constant market share claimed by Portstewart facilities at 0.3% from Zones 1-4

2018 Prices

Table 26z: Gross quantitative capacity for additional comparison goods floorspace in Portstewart

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq m net)	
		Min ¹	Max ²
2020	0.0	0	0
2025	-0.1	0	0
2030	-0.1	0	0
2035	-0.1	0	0

1. Average sales density assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved in Causeway Coast & Glens Borough

2. Average sales density assumed to be £3,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved in Causeway Coast & Glens Borough

3. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 17 (February 2020)

2018 Prices

Table 26aa: Extant comparison goods commitments in Portstewart

Destination	Reference	Proposal	Net Comparison Floorspace (sq m)	Estimated Sales Density (£/sq m)	Estimated Comparison Turnover (£m)	Status
67-69 the Promenade and 30-38 Church Street Portstewart	LA01/2016/1245/F	Amendments to extant approval LA01/2015/0373/F for mixed use development of 67-69 The Promenade and 30-38 Church Street, Portstewart to include relocation of café unit, additional bin store, rear exit from car lift, minor amendments to elevations, fenestration patterns and internal layouts	592	4,500	2.7	Permission granted 2017
Total			592		2.7	

1. Sales density assumed to be £4,500 based on Nexus Planning judgement where the occupier has not been referenced within the application.

2018 prices

Table 26ab: Net quantitative capacity for additional comparison goods floorspace in Portstewart

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2020	0.0	2.7	-2.7	-500	-700
2025	-0.1	3.1	-3.2	-500	-700
2030	-0.1	3.6	-3.8	-500	-700
2035	-0.1	4.1	-4.3	-500	-700

1. Residual calculated by subtracting turnover of commitments (sourced from Table 26aa) from surplus expenditure (sourced from Table 26x)

2. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 17 (February 2020)

2018 prices

Table 26ac: Estimated 'capacity' for new comparison goods facilities in the Rest of the Borough

Year	Total Borough Turnover (£m) ¹	Turnover from Zones 1-4 (£m) ²	Inflow from beyond Zones 1-4 (£m)	Surplus Expenditure (£m)
2020	6.3	5.9	0.4	0.0
2025	7.5	6.6	0.5	-0.3
2030	8.6	7.5	0.5	-0.5
2035	9.8	8.6	0.6	-0.6
Zone 1-4 Market Share (%)		1.3%		

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 17 (February 2020)

2. Assumes constant market share claimed by Rest of the Borough facilities at 1.3% from Zones 1-4

2018 Prices

Table 26ad: Gross quantitative capacity for additional comparison goods floorspace in the Rest of the Borough

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq m net)	
		Min ¹	Max ²
2020	0.0	0	0
2025	-0.3	0	-100
2030	-0.5	-100	-100
2035	-0.6	-100	-100

1. Average sales density assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved in Causeway Coast & Glens Borough

2. Average sales density assumed to be £3,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved in Causeway Coast & Glens Borough

3. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 17 (February 2020)

2018 Prices

Table 26ae: Extant comparison goods commitments in the Rest of the Borough

Destination	Reference	Proposal	Net Comparison Floorspace (sq m)	Estimated Sales Density (£/sq m)	Estimated Comparison Turnover (£m)	Status
Total			0		0.0	

1. Sales density assumed to be £4,500 based on Nexus Planning judgement where the occupier has not been referenced within the application.

2018 prices

Table 26af: Net quantitative capacity for additional comparison goods floorspace in the Rest of the Borough

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2020	0.0	0.0	0.0	0	0
2025	-0.3	0.0	-0.3	0	-100
2030	-0.5	0.0	-0.5	-100	-100
2035	-0.6	0.0	-0.6	-100	-100

3. Residual calculated by subtracting turnover of commitments (sourced from Table 26ae) from surplus expenditure (sourced from Table 26ac)

4. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 17 (February 2020)

2018 prices



Causeway Coast & Glens – Retail Capacity Update 2020

On behalf of Causeway Coast & Glens Council

August 2020