

Ballymun Retail Study 2016 Final Report

Prepared on behalf of Dublin City Council



Quality information

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Contents

Acknowledgements 7

Executive Summary 8

Part A

1 Introduction 2

1.0 Preface

1.1 Scope of Study - terms of reference

1.2 National Guidance on Retail Strategies

2 Planning Background 2

2.0 Introduction

2.1 Retail Planning Guidelines 2012

2.2 Ballymun Local Area Plan - Issues Paper 2015

2.3 Dublin City Development Plan 2011-2017

2.4 Fingal County Development Plan 2011-2017

2.5 Retail Strategy for the Greater Dublin Area 2008-2016

2.6 Regional Planning Guidelines for the Greater Dublin Area 2010-2022

2.7 Draft Transport Strategy for the Greater Dublin Area 2011-2030

2.8 Fingal/North Dublin Transport Study 2014

2.9 Ballymun Masterplan 1998 & 2007

2.10 Ballymun Economic Plan 2015 (Draft)

2.11 Planning History on Existing and Proposed Retail Sites

2.12 Conclusion

3 Existing Retail Environment..... 2

3.0 Introduction

3.1 Retail Categories

3.2 Retail Hierarchy

3.3 Health of Existing Centres

3.4 Conclusion

Part B

4 Household Shopper Survey 36

4.1 Introduction

4.2 Methodology

4.3 Convenience Goods Shopping

4.4 Comparison Goods Shopping

4.5 Views on Shopping

4.6 Conclusion

5 Retail Floorspace Projections 44

5.0 Introduction

5.1 Approach to Projecting Floorspace Need

5.2 Population

5.3 Expenditure

5.4 Turnover

5.5 Impact from Internet Shopping

5.6 Shopping Patterns

5.7 Assessment of Retail Floorspace Need

6 Ballymun & Comparative Analysis with other District Centres..... 53

6.0 Introduction

6.1 SWOC Assessment

6.2 Comparative Analysis - Key Retail Messages

6.3 Conclusion

Part C

7 Strategic Guidance..... 58

7.0 Introduction

7.1 Retail Guidance

7.2 Public Realm Enhancement

7.3 District Centre Management

7.4 Planning & development considerations

7.5 Implementation

7.6 Conclusion

Appendices

- Appendix 1 Surveyed county address of IKEA Shoppers
- Appendix 2 Copy of Survey Questionnaire
- Appendix 3 Household Shopper Survey Results for Ballymun
- Appendix 4 Retail Expenditure Guide 2014-2015
- Appendix 5a Report of Consultations
- Appendix 5b B4B Meeting Note

List of Tables

Table 2.1	Retail Floorspace Projections for Dublin City up to 2016 in GDA Retail Strategy
Table 3.1	Summary Information on the main retailing centres
Table 4.1	Number of Interviewees in each Electoral Division
Table 5.1	Population change in Ballymun relative to Dublin and the State
Table 5.2	Population change within Ballymun area by Electoral Division
Table 5.3	Annual percentage changes in personal consumption of goods and services
Table 5.4	Minimum floorspace need for convenience goods in Ballymun 2016-2022
Table 5.5	Maximum floorspace need for convenience goods in Ballymun 2016-2022
Table 5.6	Minimum floorspace need for comparison goods in Ballymun 2016-2022
Table 5.7	Maximum floorspace need for comparison goods in Ballymun 2016-2022
Table 6.1	Ballymun SWOC Assessment
Table 7.1	Retail Floorspace Projections for Ballymun 2016-2022
Table 7.2	Retail Floorspace Projections for Ballymun 2016-2022
Table 7.3	Key Findings and Recommendations for Retail Study 2015 - Retailing
Table 7.4	Key Findings and Recommendations for Retail Study 2015 - Public Realm
Table 7.5	Key Findings and Recommendations for Retail Study 2015 - District Centre Management

List of Figures

Figure 2.1	Dublin's Key District Centres (KDC)
Figure 2.2	Dublin City Development Plan 2011-2017 - Ballymun Zoning Map
Figure 2.3	Optimised Metro North
Figure 3.1	Distribution of retail facilities within 5-10 minutes' drive of Ballymun Main Street and the geographical extent of the household shopper survey and Ballymun Electoral Wards
Figure 3.2	Ballymun's Largest node of Commercial Activity
Figure 3.3	Survey of Uses in Ballymun's two Commercial Nodes
Figure 3.4	Finglas Village Centre
Figure 3.5	OMNI Shopping Centre
Figure 3.6	Charlestown Shopping Centre
Figure 3.7a	Clearwater Retail Park
Figure 3.7b	Clearwater Retail Park
Figure 3.8a	Gulliver's Retail Park and Neighbourhood Centre
Figure 3.8b	Gulliver's Retail Park and Neighbourhood Centre
Figure 3.9	Ballymun IKEA
Figure 3.10	Lidl, St Margaret's Road, Finglas
Figure 3.11	Percentage of vacant units in large retail centres
Figure 3.12a	Vacancies at Santry Cross
Figure 3.12b	Vacancies at Santry Cross
Figure 3.13	Percentage of vacant units in Neighbourhood Centres
Figure 4.1	Main destination for grocery shopping
Figure 4.2	Mode of travel for convenience goods shopping
Figure 4.3	Location of top-up convenience goods shopping
Figure 4.4	Main destination for comparison goods shopping
Figure 4.5	Mode of travel for comparison goods shopping
Figure 4.6	Opinion on existing shopping in Ballymun
Figure 4.7	Suggestions to improve shopping in Ballymun
Figure 4.8	Suggestions to improve Ballymun overall
Figure 4.9	Proportion of people who visit Ballymun in the evenings
Figure 7.1	Key Components of Retail Study
Figure 7.2	Example of convenience goods shopping
Figure 7.3	Commercial Nodes in Ballymun
Figure 7.4	Suggested Civic Precinct for Ballymun
Figure 7.5	Ballymun Plaza
Figure 7.6	AECOM's Public Realm Work in Downpatrick
Figure 7.7	AECOM's Public Realm Work in Newcastle, Co. Down
Figure 7.8	Café/Restaurant example

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Executive Summary

Introduction

The Ballymun Retail Study has been prepared in order to inform the new statutory Local Area Plan (LAP) for Ballymun. The study provides guidance on the capacity for new retail development in the Key District Centre of Ballymun, as well as advice on the nature and location of this development in the foreseeable future up to the year 2022.

Types of retailing

For the purposes of the retail study shops are categorised as outlets selling either convenience goods or comparison goods. Convenience goods are mainly groceries and other consumable commodities that are purchased regularly and usually locally. They include food, drinks, tobacco, and non-durable household goods. Comparison goods are durable items for which customers are prepared to travel some distance in order to compare prices and quality. They include clothes, footwear, household durables and leisure goods.

Household shopper survey

An integral component of this retail study was the carrying out of a household shopper survey of Ballymun and surrounding area. It was targeted at acquiring facts on shopper behaviour and obtaining views from the local shopping public. It was commissioned by the Council in order to obtain an independent, evidence-based understanding of shopping patterns in the area so that it can better plan for retailing in Ballymun.

Expenditure leakage & a desire for more shopping

Significantly, the survey revealed low levels of disposable income and high rates of expenditure leakage from Ballymun for both convenience goods and comparison goods shopping. It also revealed a corresponding desire by the residents to improve shopping provision in the District Centre.

Retail floorspace projections

Equipped with these survey findings, the Retail Study was able to estimate the capacity for additional retail floorspace based on locally indexed figures and assumptions. These constitute the low floorspace projections tabulated below i.e. 1,258 net sq.m. for convenience goods and 1,551 net sq.m. for comparison goods. The low floorspace capacity for convenience goods development is equivalent in size to a new supermarket. The low floorspace capacity for comparison goods shopping approximates in size to a dozen Main Street units or two of the retail warehouses in Gulliver's Retail Park.

In the interest of sensitivity testing and in order to allow for flexibility in floorspace requirements should economic and population conditions improve, the capacity for additional retail floorspace was also estimated on the basis of higher regional figures for Dublin, which are similar to national figures. These constitute the high floorspace projections tabulated i.e. 2,115 net sq.m. for convenience goods and 3,340 net sq.m. for comparison goods. These high floorspace projections for Ballymun also take into account the prospect of additional retail expenditure from workers and students in the area and the possibility of a significant increase in population from new housing development.

Capacity for additional retail floorspace in Ballymun up to 2022

Floorspace category	Forecast	Net sq.m.	Net sq.ft.
Convenience goods	Low	1,258	13,541
	High	2,115	22,766
Comparison goods	Low	1,551	16,694
	High	3,340	35,951

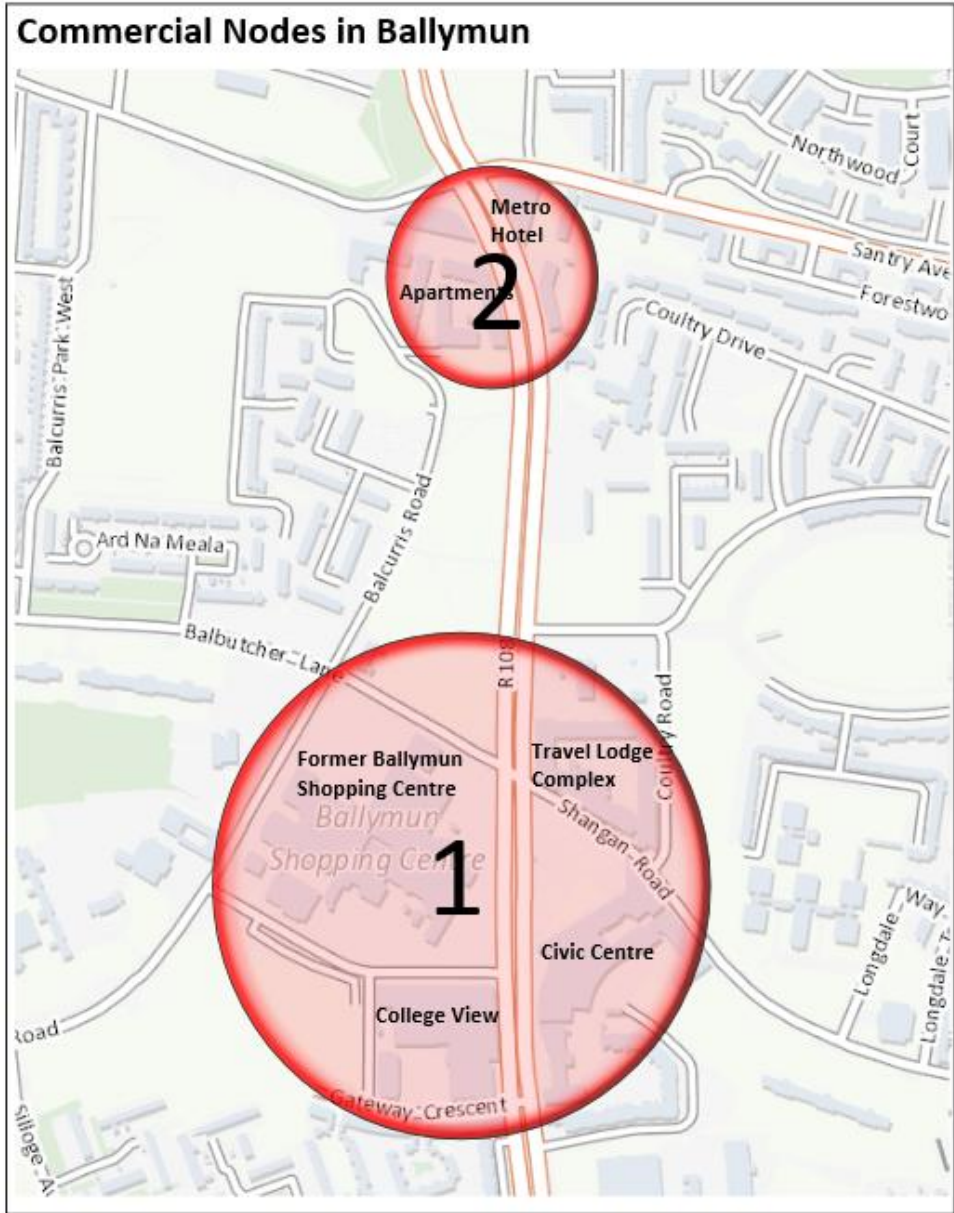
Notwithstanding the tabulated findings above it is important to note that the high capacity projections are not intended to function as floorspace caps. Rather, as recognized in the national 2012 Retail Planning Guidelines (section 3.6) the floorspace estimates are intended to provide broad guidance on retail floorspace need and should not serve to inhibit competition.

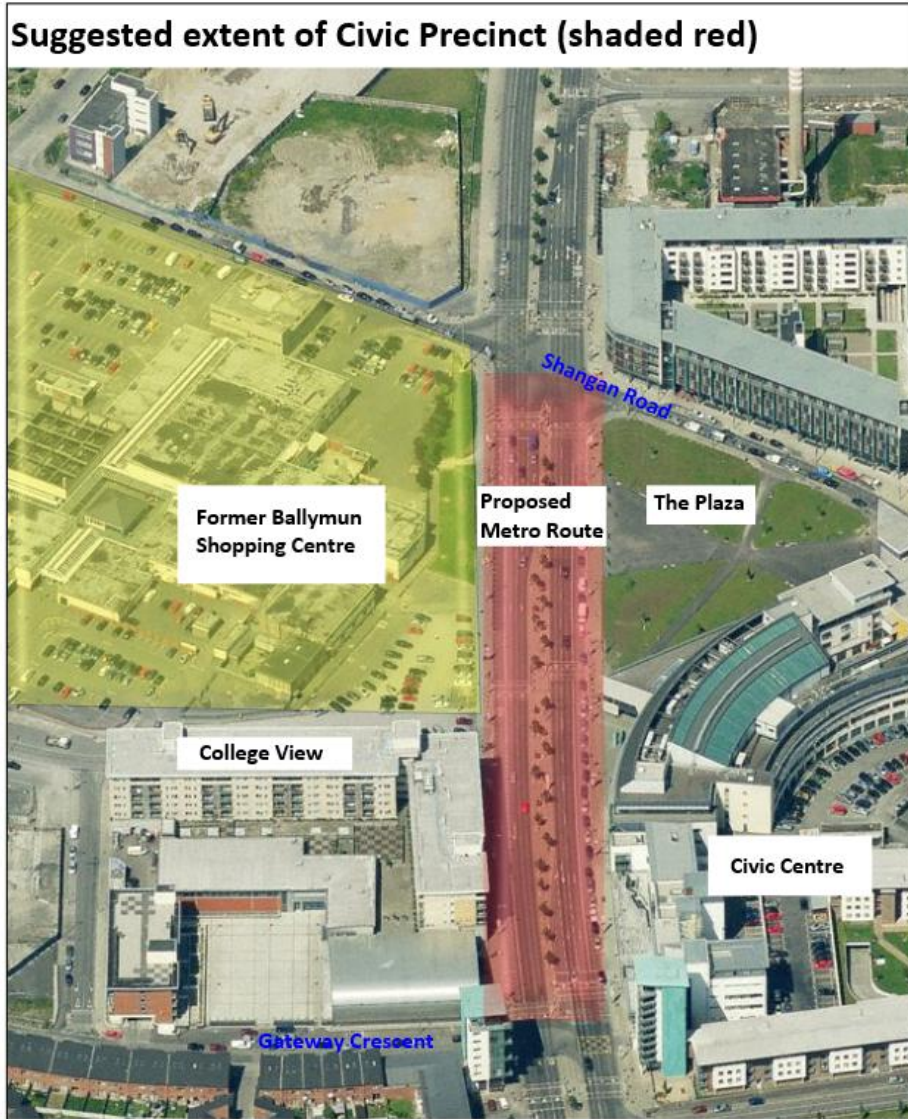
Key recommendations of study

Based on the interrelated output of the household shopper survey, the consultation process, floorspace need projections, and comparative analysis with other District Centres, a number of recommendations were formulated. These relate to retailing, associated public realm enhancements and District Centre management (see tables in Section 7 of the Retail Study for full lists of recommendations). The main recommendations include the following:

- Encourage opening of another foodstore in Ballymun’s zoned Z4 “mixed services” lands to help claw back expenditure leakage. Capacity exists to add between 1,258 and 2,115 net sq.m. of new convenience goods floorspace in Ballymun up to the year 2022.
- Facilitate opening of a number of comparison goods units, including bulky goods units, in association with this foodstore development. Capacity exists to add between 1,551 and 3,340 net sq.m. of new comparison goods floorspace in Ballymun up to the year 2022.
- Adopt the sequential approach to the assessment of large retail proposals by appraising the suitability, availability and viability of first developing land for retail use within and around the largest commercial node in Ballymun (depicted as No.1 in the map overleaf). Development south of Santry Avenue, including the Metro Hotel, constitutes the second commercial node in Ballymun (shown as No.2).
- Develop new retail units in a non-mall format with own-door shopfronts that are free from the operational, leasing and servicing commitments of a shopping centre.
- Designate the area (circa 270m long) on Main Street between Shangan Road & Gateway Crescent as a Civic Precinct, which would act as a focal point for Ballymun (see aerial image on page 11). Create a distinctive sense of place and identity at the Civic Precinct via streetscape enhancements and ensure that the precinct integrates with proposals for the Metro Stop and aspirations to increase the functionality of the Plaza area.
- As a complement to the above proposal promote the creation of a quality built environment on the site of the former shopping centre, capable of instilling a sense of arrival and encouraging people to stop and shop.

Despite its current condition the Ballymun Shopping Centre site is pivotal to the continued regeneration of Ballymun. While it is recognised that market realities and business viability models will ultimately determine how much retail floorspace will be built in Ballymun in the coming years this Retail Study is intended to assist the Council in planning for such development.





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PART A: Introduction

01

Introduction

1.0 Preface

This Retail Study for the Ballymun area has been prepared by AECOM Ltd at the request of Dublin City Council (DCC). It was commissioned by the Council in order to obtain an independent, evidence-based understanding of shopping patterns in the area so that it can better plan for retailing in Ballymun.

The specific purpose of the study is to inform the retail strategy of the new statutory Local Area Plan for Ballymun. In this regard, it is intended to assist in the formulation of retail guidance relating to the scale, nature and location of future retail provision during the plan period.

1.1 Scope of Study - Terms of reference

The Brief required the completion of a retail assessment and strategy for Ballymun over a four month period from September 2015 to December 2015. Meetings with the Council underlined the importance of acquiring raw data on consumer behaviour and the existing shopping environment. The specific items listed in the Council's terms of reference are outlined below:

- Retail Survey of Ballymun and north Glasnevin residents
- Survey of surrounding retail centres
- Analysis of retail seepage based on the above
- Identify barriers to retail development
- Market analysis of the appropriate retail quantum provision for Ballymun
- Identify phasing strategies
- Identify suitable complementary uses
- Advise on the types of retailing for Ballymun.

A key element of the study was to provide a realistic assessment of retailing in the context of the area's designation as a key district centre within the Dublin City Development Plan 2011-2017 and the Retail Strategy of the Greater Dublin Area 2008-2016.

As the work progressed it became increasingly apparent that the stipulated "retail survey of Ballymun residents" would form the backbone of the Retail Study. Its findings are relevant, both directly and indirectly, to the consideration of all the other terms of reference cited above.

1.2 National guidance on Retail Strategies

The commissioning of this Retail Study is consistent with the emphasis in the 2012 national Retail Planning Guidelines (RPGs) for "evidence-based" retail planning. Section 3.3 of the RPGs details the minimum requirements of retail strategies within City and County Development Plans. While these minimum requirements may not strictly apply to

Local Area Plans they do offer a framework for the preparation of the retail study. The minimum requirements include information on the following:

- *the elements of their settlement hierarchy*
- *the level and form of retailing activity appropriate;*
- *the boundaries of the core shopping areas;*
- *a broad assessment (square metres) of the requirement for additional retail floorspace;*
- *strategic guidance on the location and scale of retail development, including where appropriate identifying opportunity sites which are suitable and available and which match the future retailing needs of the area;*
- *Identification of sites which can accommodate the needs of modern retail formats in a way that maintains the essential character of the shopping area;*
- *objectives to support action initiatives in city and town centres; such as*
 - *Mobility management measures that both improve accessibility of retail areas while aiming to develop a pedestrian and cyclist friendly urban environment and vibrant street life; and*
 - *Public realm interventions aimed at improving the retailing experience through high quality civic design, provision of attractive street furnishing, lighting and effective street cleaning/business improvement district type initiatives; and*
- *relevant development management criteria for the assessment of retail developments.*

As this strategy applies to a District Centre it was not considered necessary to define a core shopping area, as referred to in the third requirement listed above. However, there are two distinctive nodes of commercial activity in Ballymun and these are highlighted in the study.

Also, while the RPGs state that the broad assessment for additional retail floorspace only applies to those areas covered by a joint or multi-authority retail strategy, such as the Greater Dublin Area (GDA), a localised assessment of the requirement for additional retail floorspace in Ballymun is considered an integral part of this study.

1.3 Structure of report

Within the context of the above points, the retail study essentially consists of 3 parts, which are briefly described below.

- Part A contains 3 sections that outline the retail context for the study. It provides an overview of the existing retail environment and the trading position of Ballymun within the retail hierarchy.
- Part B details the key strands of research and analysis undertaken to inform the retail study. These include a shopper household survey, retail floorspace projections and comparative analysis with other District Centres.
- Part C considers the prospects for retailing in Ballymun in the light of the above baseline analysis and outlines strategic recommendations to assist with forward planning in the area.

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Planning Background

02

Planning Background

2.0 Introduction

In order to acquire a full appreciation of the statutory and non-statutory policy background for the Retail Study a range of documentation and information was consulted. This included the following:

- National Retail Planning Guidelines 2012
- Ballymun Local Area Plan – Issues Paper 2015
- Draft Dublin City Development Plan 2016-2022
- Dublin City Development Plan 2011-2017
- Fingal County Development Plan 2011-2017
- Retail Strategy for the Greater Dublin Area 2008 – 2016
- Regional Planning Guidelines for the Greater Dublin Area 2010-2022
- Greater Dublin Area Draft Transport Strategy 2011-2030
- Fingal/North Dublin Transport Study, November 2014
- Ballymun Masterplan 1998 and updated project map 2007
- Ballymun Economic Plan 2015 (Draft)
- Planning history on existing and proposed retail sites

A brief commentary is now provided on each of the above.

2.1 Retail Planning Guidelines 2012

The requirement to undertake the study stems from the requirements of the Retail Planning Guidelines 2012 (RPGs). Section 2.2.4 of the RPGs relates to District Centres, which states:

“Having designated the relevant city and town centre areas and any district centres in the core strategy, it is the function of the retail strategy of the relevant development plan to specify the level and types of retailing that will be appropriate to those areas.”

Section 3.4 of the RPGs explains that District Centres are suitable for a mix of uses and should not function simply as shopping locations in their own right:

*“The role of a district centre is to provide a range of retail and non-retail service functions (e.g. banks, post office, local offices, restaurants, public houses, community and cultural facilities for the community at a level consistent with the function of that centre in the core strategy. **They should not serve as a retail destination in their own right sufficient to adversely impact on the city/town centre to which they are subservient.** They can be purpose built serving new or expanding suburbs or traditional serving long established communities.”* (Section 3.4, RPGs)

Moreover, the RPGs specify that the significant extension of a District Centre should be premised on significant population growth or a demonstrable level of under-provision of retail space:

“The need for additional retail development in particular district centres to serve future population growth or for **any significant extension to an existing district centre should be identified in the development plan and be based on a significant growth in population in the intended location or on a demonstrable level of under-provision of retailing or other services** to meet the regular convenience and lower order comparison shopping needs of new communities as provided for and quantified by the relevant core strategy.” (Section 3.4, RPGs)

It will become evident throughout this Study that there is a demonstrable level of under-provision of retail space in Ballymun and that, accordingly, there is capacity to add to its retail provision.

2.2 Ballymun Local Area Plan – Issues Paper 2015

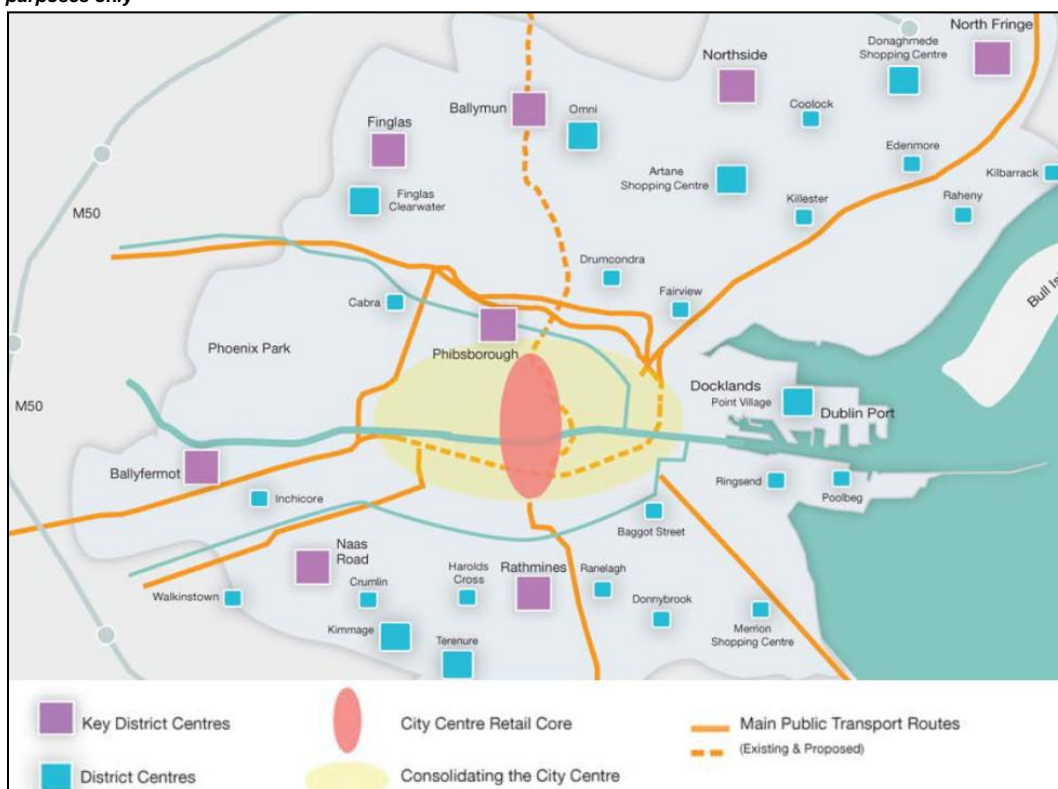
The Issues Paper for the Ballymun Local Area Plan was published for public consultation from the 5th November until the 3rd December 2015. Ten of the twenty-nine written submissions received raised issues relating to retailing. In general, the retail submissions pointed to the economic imperative of shopping development taking place in Ballymun, as well as the corresponding requirement to inject much needed vibrancy into the area. Specifically, it was pointed out that over 700 people were employed in the Ballymun area and that their expenditure contribution should also be taken into account when assessing future floorspace need.

2.3 Dublin City Development Plan 2011-2017

Although the new Dublin City Development Plan is currently in draft form it is still necessary to highlight the key elements of the current Development Plan 2011-2017 as they relate to Ballymun. This is because the broad strategy and designations for the regeneration of Ballymun in the current plan still apply in the Draft Dublin City Development Plan 2016-2022.

Ballymun is designated as 1 of 8 Key District Centres (KDC) in Dublin City (see Plan map extract in Figure 2.1). The nearby Finglas Village is also a designated KDC under the Development Plan, as well as Phibsborough and Northside.

Figure 2.1 Key District Centres identified in Dublin City Development Plan 2011-17, p150 – illustrative purposes only



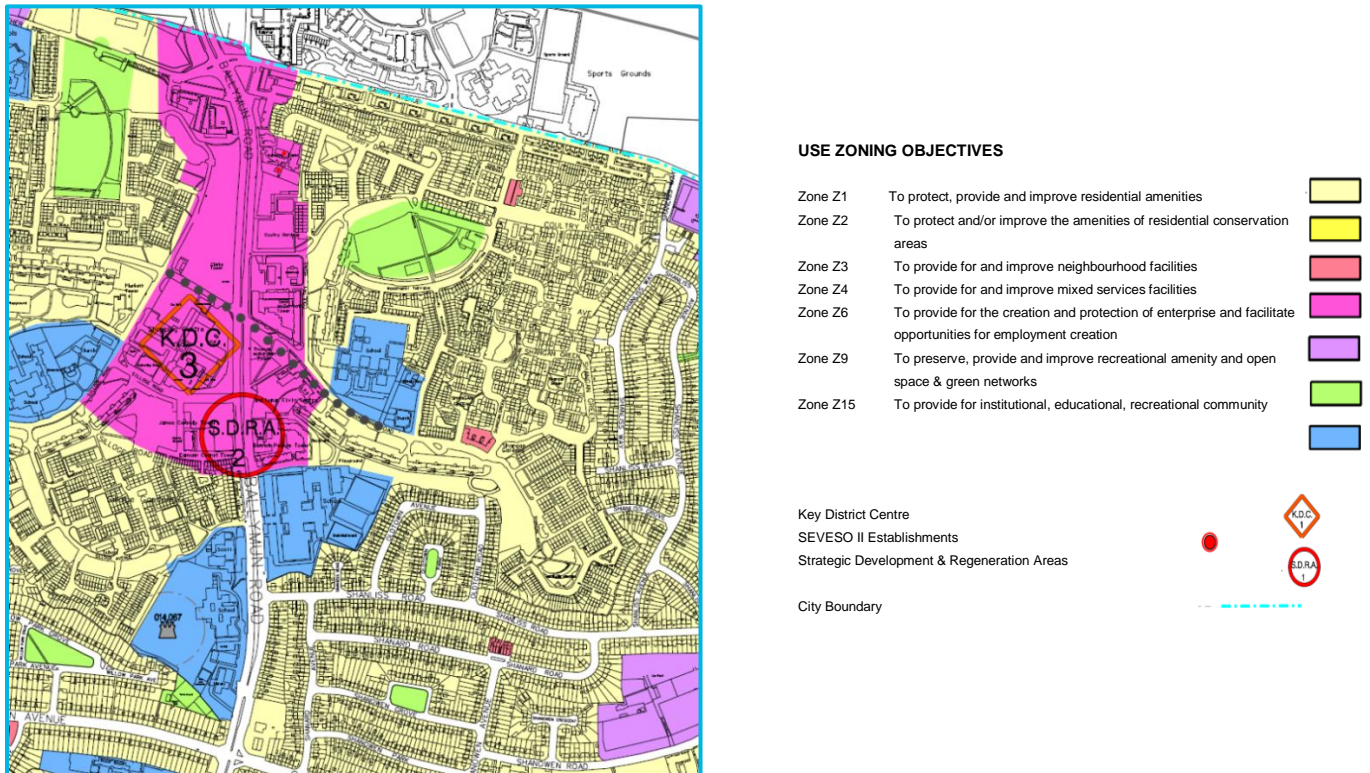
KDCs are designated as focal points for the concentration of services within a particular location. They typically accommodate retail, office, community, government and leisure/entertainment functions for the local residential population. In order to encourage investment in KDCs the Development Plan offers greater flexibility in the type and scale of uses it would countenance. For example, the floorspace cap on office size does not apply.

Furthermore, in the case of Ballymun, high density residential development is also promoted in this KDC. The civic and commercial centre of Ballymun is zoned Z4 in the Dublin City Development Plan 2011-2017 and seeks to provide and improve mixed services and facilities (Figure 2.2). Ballymun is also zoned as a Strategic Development and Regeneration Area (SDRA), the overriding objective of which is to promote regeneration via residential and employment development.

In relation to retailing specifically, the broad thrust of retail policies in the Development Plan focuses on improving shopping provision in older District Centres such as Ballymun, a crucial component of which is the development of a healthy convenience goods sector.

*“In terms of the higher order or key district centres, it is possible to identify a number in need of revitalisation if they are to serve their function as key centres or hubs for the surrounding communities, for example, **Ballymun**, Northside, Phibsborough and Rathmines. These key district centres should serve a local need, but also a broader catchment of the surrounding local community and so need to expand, diversify and upgrade the retail profile to include higher order uses and speciality shops to reflect their status as higher order centres within the retail hierarchy and to develop a distinctive retail profile within the overall retail hierarchy of Dublin City. **For all district centres, the revitalisation strategy should focus on achieving an amount and quality of convenience shopping to minimise outflow of expenditure and unsustainable travel patterns**” (p337, Appendix 4, Dublin City Development Plan 2011-2017).*

Figure 2.2 Dublin City Development Plan 2011-2017 Ballymun Zoning map – illustrative purposes only



2.4 Fingal County Development Plan 2011-2017

Because part of the Ballymun study area lies within Fingal County Council, it is necessary to review the Fingal County Development Plan 2011-2017.

The nearby Charlestown Shopping Centre is a designated District Centre under the Fingal County Development Plan. There is also a Neighbourhood Centre in the vicinity of Gulliver's Retail Park, which is anchored by Eurospar. It has yet to be formally designated as a Neighbourhood Centre given that it opened after the preparation of the Plan.

2.5 Retail Strategy for the Greater Dublin Area 2008 – 2016

Under the Retail Strategy for the Greater Dublin Area (GDA), Ballymun, Finglas Village, OMNI Shopping Centre and Charlestown are all recognised as Level 3 Centres within the retail hierarchy. Dublin City Centre constitutes the only Level 1 Centre, followed by Level 2 Centres such as Blanchardstown, Liffey Valley and Dundrum. The neighbourhood centres and local shops are jointly viewed as Level 4 centres. Paragraph 6.33 of the GDA Retail Strategy contains the following policy for places such as Ballymun.

“In the suburban areas, to support the hierarchy of retail locations (district, neighbourhood and local) that serves the requirements of the city population. Within this hierarchy, support of the development and expansion of the functions of the Prime Urban Centres (as locations of employment, retail, community and tertiary services) is centrally important.” P75, GDA Retail Strategy.

The GDA Retail Strategy also outlines the broad retail floorspace projections for the Dublin City Council area up to year 2016 (see Table 2.1). Based upon the actual level of construction to have taken place during the period 2008-2016 it is fair to assert that the majority of the projected floorspace, especially in respect of comparison goods shopping, was never built.

Table 2.1: Retail floorspace Projections for Dublin City up to 2016 in GDA Retail Strategy

Types of goods	Gross lettable sq.m.*	Net sq.m.#
Convenience goods	38,586 – 46,303	27,010 – 32,412
Comparison goods	181,256 – 296,601	126,879 – 207,621

*excludes mall/ circulation space

estimated on basis of 70% of area being net sales space

Source: Tables 5.7, 5.8, 5.9 and 5.0 of the GDA Retail Strategy 2008 - 2016

2.6 Regional Planning Guidelines for the Greater Dublin Area 2010-2022

Prepared in June 2010 the Regional Planning Guidelines (RPGs) for the GDA have a particular relevance for the study because of their reference to the Metro North proposal.

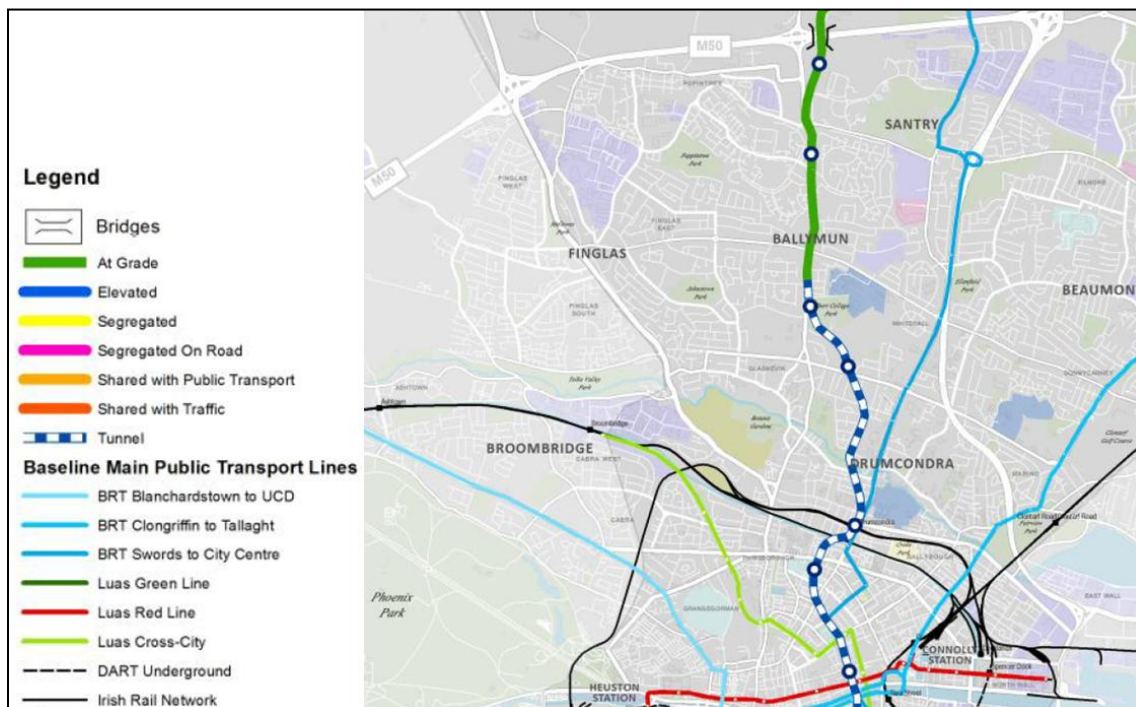
*“Metro North is planned to follow a northerly route from Stephen’s Green to Swords via O’Connell St, **Ballymun** and onwards to the Airport. It is planned for use by 35 million passengers per year and to deliver a journey time of approximately 20 minutes between Stephen’s Green and the Airport.”* P58, RPGs for the GDA.

Additional information on the Metro North proposal has emerged in subsequent publications referred to below.

2.7 Draft Transport Strategy for the Greater Dublin Area 2011-2030

As indicated above, it is proposed that Ballymun will form part of the proposed Metro North line and a Stop will be located here. As stated in section 10.3.6 of the Draft Transport Strategy “Metro North is a key project of the Strategy, designed to provide a high capacity public transport link serving the northern section of the city area and extending to the designated town of Swords. It also connects Dublin Airport, the main entry point into Ireland by air, to the city centre with a modern, high quality rail service.”

Figure 2.3 Optimised Metro North (LR7) (Source: Fingal/ North Dublin Transport Study, 2014, pg. 58.) - illustrative purposes only



The draft Transport Strategy also recommends priority improvement measures for the North Orbital Quality Bus Corridor (QBC) that links Ballymun with Finglas and Blanchardstown in the west and Coolock in the east.

2.8 Fingal/North Dublin Transport Study 2014

In the Fingal/North Dublin Transport Study the Optimized Metro North is anticipated to pass at grade i.e. above ground at Ballymun (Figure 2.3). The tram and platform will be 60m in length and this is adjudged suitable to cater for a capacity throughput of 12,000 passengers per direction per hour (ppdph). Coincidentally, this number of passengers approximates to the total number of vehicles passing Ballymun on a typical weekday. Further consideration of the timing of this Metro North proposal will therefore be needed, once more detail on the proposal is known

2.9 Ballymun Masterplan 1998 & 2007

Although the Masterplan is a non-statutory document it reflects the aspirations of the local community given the consultation undertaken and is one of the planning documents which the Dublin City Development Plan has regard to – see Appendix 1 of the DCC Development Plan 2011-2017 . The initial 1998 Masterplan was formulated to assist with the regeneration of the area, which involved the demolition of 36 no. high rise residential blocks. The Masterplan project map was updated in 2007 and, some of its priorities still resonate today. These include a desire for traffic calming measures, clustering of public services and the introduction of private sector incentives.

2.10 Ballymun Economic Plan 2015 (Draft)

The Ballymun Economic Plan identifies 5 key strategic goals for economic development in Ballymun over the next five years. Two of these are partly related to the findings of the Retail Study, namely the “Development of sites for economic development” and the “Reactivation of unused space”. As far as the Retail Study is concerned (see Section 7.0 later) the former goal clearly pertains to the opportunity for the redevelopment of the redundant shopping centre site and the sequential appraisal of sites for retail development beyond this. The latter strategic goal relates to the vacant units existing on the main street and in the neighbourhood centres, wherein the Retail Study advocates maximum flexibility in the uses and incentives permitted in order to encourage their occupation.

2.11 Planning history on existing and proposed retail sites

A 10 year planning permission on the site of the former Ballymun Shopping Centre was granted in 2009 (Ref 4828/08) for a mixed use development in excess of a quarter of a million sq.ft. Certain similar leisure elements of the proposal have however now opened (cineplex) or are due to open (bowling alley) at the nearby Charlestown Shopping Centre in Fingal County Council. Two thousand car parking spaces were proposed as part of the planning permission and were to be integrated with an underground Metro stop, which the Fingal/North Dublin Transport Study 2014 now indicates will be above ground. This permission for the redevelopment of Ballymun Shopping Centre was proposed during the Celtic Tiger years and a scheme of its scale would likely fail to secure investment in the current era of austerity and restricted lending. It is due to expire in 2019.

Immediately north of the above site there is an expression on interest to provide an anchor food store within a mixed use four storey structure (to include office space).

2.12 Conclusion

The zoned Z4 lands in Ballymun Key District Centre afford opportunities for significant retail investment. The Dublin City Development Plan 2011-2017 particularly cites the need to ensure that a strong convenience goods sector develops in District Centres, in the interest of minimizing expenditure leakage and promoting sustainable transport modes. Balanced against the desire to bolster shopping provision, however, national guidance stipulates that District Centres should not become retail destinations in their own right. Clearly, when assessing the future need for retailing in Ballymun, there is a requirement for the Retail Study to recognise the aspirations of both national and local planning guidance.

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Existing Retail Environment

03

Existing Retail Environment

3.1 Introduction

This section of the Retail Study reviews existing shopping provision in Ballymun and considers its competitive relationship with surrounding retail centres.

3.2 Retail categories

When seeking to review the existing retail environment it is first necessary to appreciate how shops are categorised. For the purposes of urban and rural planning, shops are classified as outlets selling either (i) convenience goods or (ii) comparison goods.

(i) Convenience goods are mainly groceries and other consumable commodities that are generally purchased regularly and usually locally. They include food, drinks, tobacco, newspapers, magazines, cleaning materials and toiletries. Shopping for convenience goods is often simply referred to as food shopping.

The regularity of convenience shopping trips and the nature of the merchandise sold (especially chilled/frozen foods) dictate that shoppers for convenience goods normally undertake short trips to purchase such items.

(ii) Comparison goods are durable items for which customers are prepared to travel some distance in order to compare prices and quality. They include clothes, footwear, household durables and leisure goods. They are generally purchased in large retail centres and shopping trips for these goods generally take longer.

Bulky goods shopping is a subset of comparison goods shopping and refers to shopping for those comparison goods which are difficult to accommodate in town centres because of their space requirements for large showrooms, parking and servicing. They include items such as DIY goods, furniture, carpets and electrical/white goods and are typically sold from retail warehouses.

Comparison goods shopping, including bulky goods shopping, is often simply referred to as non-food shopping.

3.2 Retail hierarchy

As identified in the Retail Strategy for the Greater Dublin Area, the District Centre of Ballymun is considered a Level 3 centre within the retail hierarchy that exists in Dublin.

Level 1 – Dublin City Centre;

Level 2 – Blanchardstown;

Level 3 – **Ballymun**, Finglas, OMNI Shopping Centre, Charlestown Shopping Centre.

Level 4 – Neighbourhood Centres (Poppintree, Coultry, Sillogue & Shangan) & local centres.

In addition to the above there are other retail locations that have not been classified in the Retail Strategy for the GDA but which function on a par with the Level 3 and 4 centres indicated. These include:

- Clearwater retail park (anchored by a Tesco superstore);
- Aldi and Lidl (both have stores in Finglas and Santry);
- Gulliver's Retail Park and Neighbourhood Centre; and
- IKEA.

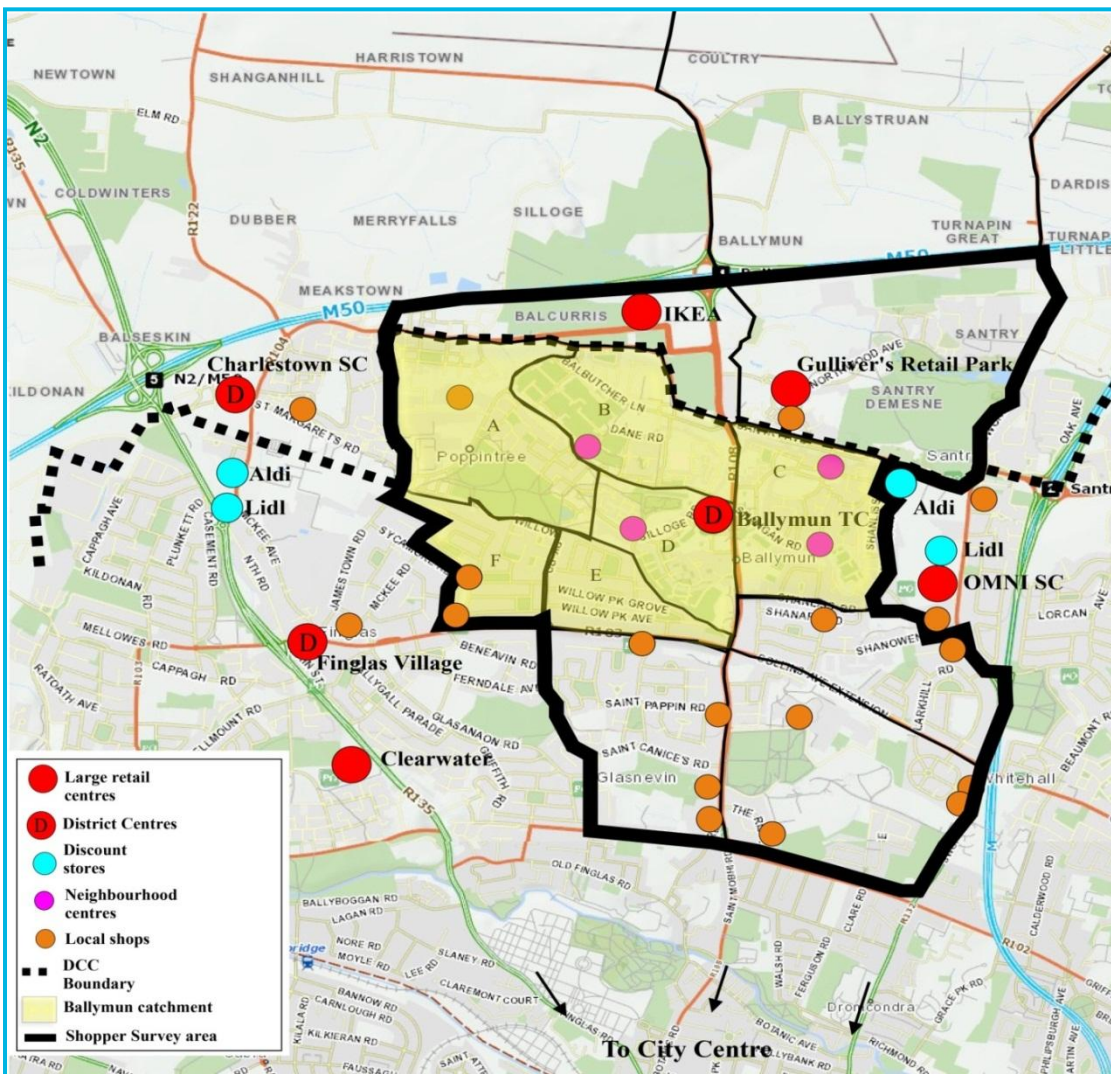
The distribution of these retail locations is displayed in Figure 3.1. The map shows the location of retail facilities in the general area ranging from the large retail centres to local shops. They are all located within 5-10 minutes' drive of Ballymun Main Street and cater for the residents of Ballymun, Glasnevin, Santry, Whitehall and Finglas. Three of the seven large retail centres in the general area, namely Charlestown Shopping Centre, IKEA and Gulliver's Retail Park, are located within Fingal County Council.

The actual retail catchment of Ballymun is assumed to include all the Electoral Divisions (EDs) labelled Ballymun A to F (shaded transparent yellow in Figure 3.1). This is the area within which retail floorspace need is calculated in Section 5.0 of the Retail Study. It is reasonable to contend that Ballymun is, at the very least, entitled to compete for a share of retail expenditure within its own electoral area.

Figure 3.1 also displays the geographical extent of the household shopper survey area (referenced in Section 4.0 as the study area). It was demarcated to include additional areas, such as North Glasnevin, that are within convenient reach of Ballymun and from where people might either visit or pass through Ballymun. The identification of a survey area allows for the assessment of potential expenditure inflow into the Ballymun catchment area.

It is estimated that the catchment presently contains a total of 2,832 net sq.m. of convenience goods floorspace and little comparison goods floorspace, save for pharmacies and a number of charity shops. A review of shopping facilities in all these centres is outlined below.

Figure 3.1 Distribution of retail facilities within 5-10 minutes' drive of Ballymun Main Street and the geographical extent of the household shopper survey area and Ballymun Electoral Divisions (EDs) – illustrative purposes only



Ballymun

Shopping in Ballymun is located along its main street and within two nodes of commercial activity that have congregated at the intersections of the road network.

The largest node (Figures 3.2 and 3.3) extends from the intersection of the Shangan Road and Balbutcher Lane Lower to Gateway Crescent. Essentially four mixed use building blocks are assembled in this area, including: the Plaza, Civic Centre, College View and the former Shopping Centre. Retail use occupies a number of the ground floor units in these buildings.

The second commercial node is located south of Santry Avenue and is known as Santry Cross. It forms part of mainly high rise residential development (Santry Cross) and the Metro Hotel. Compared to the large commercial node above it accommodates little retail use.

In addition to Ballymun Main Street there are four local neighbourhood centres located within Ballymun housing areas at:

- Shangan;
- Poppintree;
- Sillogue; and
- Coultry.

In terms of convenience goods shopping Ballymun is equipped with a Supervalu store at College View in the large commercial node. It comprises a gross floor area of approximately 1,400 gross sq m (circa 15,000 sq ft) and incorporates the relocated post office from the former shopping centre. The store relies on adjacent off-street parking and neighbouring parking spaces still available on the site of the former shopping centre.

Other shops selling convenience goods on and immediately off Ballymun Main Street include a Centra store on Shangan Road and an Eastern European food outlet at Santry Cross.

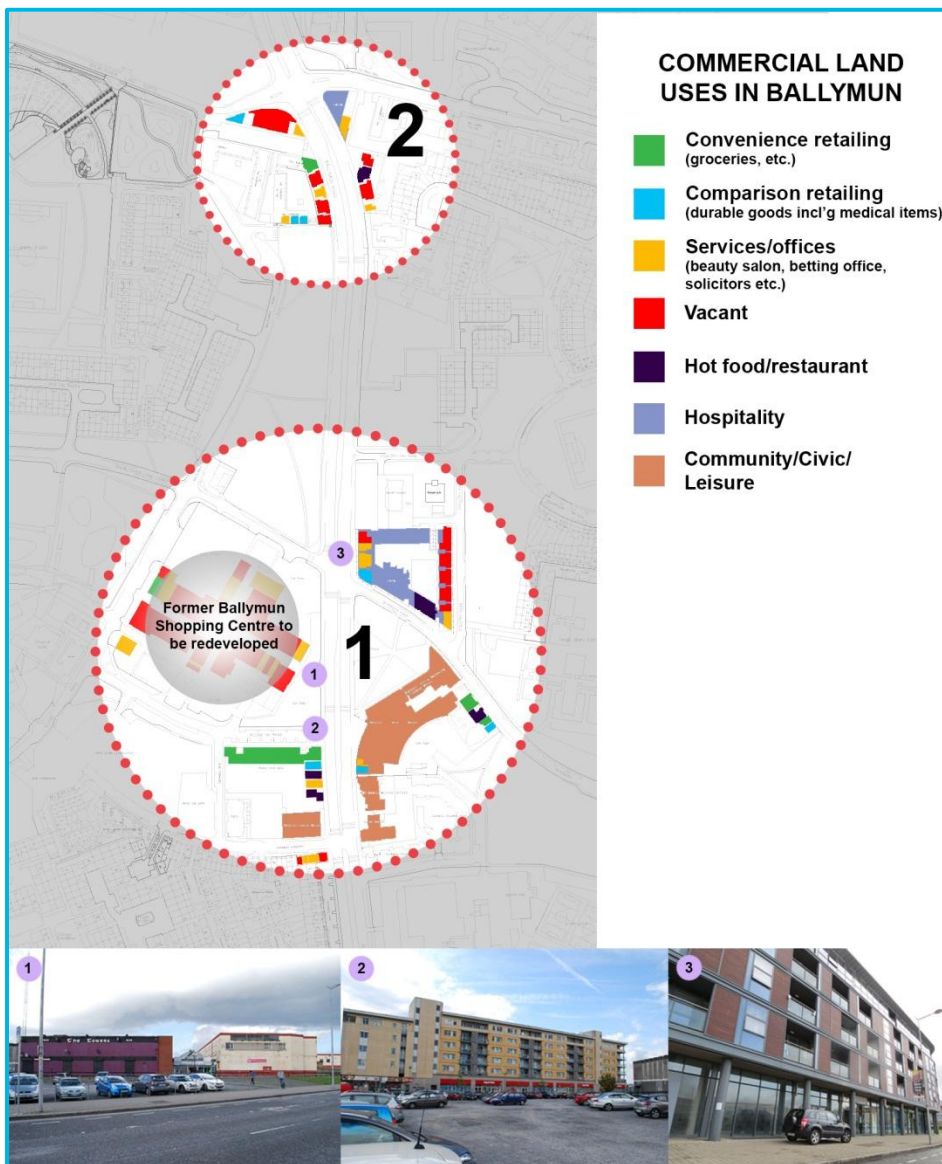
With the recent demise of Ballymun Shopping Centre, which first opened in 1969, there is little comparison goods shopping remaining in Ballymun. As one of the oldest shopping centres in the area its trading viability soon deteriorated. This was exacerbated by the departure of its anchor store, Tesco, in April 2014 and by competition from neighbouring retail centres and freestanding foodstores. Tesco could afford to sacrifice its anchor role in Ballymun Shopping Centre because it enjoyed a market share in the general area via its stores in Clearwater (redeveloped in 2001) and OMNI (trading since 1991).

With the departure of Tesco, convenience goods retailing in the Ballymun area, including its neighbourhood centres, is essentially provided by outlets aligned to the wholesaler Musgraves, namely Supervalu, Centra and Daybreak. Incidentally, mindful of the prevalence of these Musgraves' units, the latest 2015 data for the country as a whole indicates that the market share of Supervalu (24.3%) lies just behind Tesco (24.8%) and above Dunnes (22.7%), Lidl and Aldi (both circa 9%).



AECOM's survey of commercial uses in Ballymun demonstrated high levels of vacancy, allied with low levels of diversity of the retail offer. A prevalence of beauty salons and pharmacies was apparent in place of the range of comparison goods shops that could potentially be available, such as high street fashion stores and other speciality shops.

Figure 3.3 Survey of uses in Ballymun's two Commercial Nodes – illustrative purposes only



Finglas Village Centre

Convenience goods shopping in Finglas Village is principally provided by Supervalu, Iceland and Mace, as well as the nearby Aldi and Lidl stores. Direct vehicular access off the N2 contributes to congestion in the village centre during peak travel times. Despite a limited range of comparison goods shops available, a number of them, namely the electrical retailer Power City, is highly popular with residents in Ballymun.

Figure 3.4 Finglas Village Centre



OMNI Park Shopping Centre

OMNI Park Shopping Centre is the largest retail centre in the general area of Ballymun, with 23,225 gross retail sq. m. and 1,500 free parking spaces. Opening in 1991 it comprises over 60 units and is anchored by Tesco (3,700 gross sq.m.) and Penneys (2,300 gross sq.m.) with the latter proving a big draw for shoppers. It also has a retail park accommodating Argos, Peacocks and others, as well as an 11 screen cinema and, more recently, a Lidl store. The fast food operators McDonald's and KFC both trade here. The on-site facilitation of a dedicated taxi rank is testament to the popularity of the centre. There is a bus service from Ballymun taking elderly residents to shop at OMNI. The venue has an all-day appeal, with the trade of the cinema and eateries at night complementing the daytime trade of the shopping mall. Together with the Jervis Centre in Dublin City Centre, it is the only shopping centre in the Dublin City Council area that has a credit rating of AAA, which means it is financially robust and attractive for investment (source: DTZ Sherry Fitzgerald 2013).



Charlestown Shopping Centre

Charlestown Shopping Centre opened in 2007 and has a gross floorspace of 16,000 sq m, of which 7,000 gross sq m is allocated to the anchor tenant Dunnes Stores. Comprising in the region of 30 shops it currently has 300 surface car parking spaces and 500 basement parking spaces. Parking is free for the first 2 hours and €1.50 per hour thereafter. McDonalds and KFC also operate in freestanding premises nearby. In October 2015 a 9 screen Odeon Cinema commenced trading. Like OMNI, the development of a cinema and planned opening in December 2015 of connecting eateries (Starbucks, TGI Friday) will result in an all-day commercial offer. This all day appeal will be further strengthened by the planned opening in 2016 of a 40,000 sq ft leisureplex, which will include ten pin bowling. Furthermore, the original concept plan for the site, together with discussions with the centre manager, indicate that a number of retail warehouse units may constitute a third and final phase of development at Charlestown in the area of the existing surface car park, though planning permission has yet to be obtained for this.



Figure 3.6 Charlestown Shopping Centre

Clearwater Retail Park

Clearwater Retail Park was redeveloped in 2001 and comprises in excess of 12,000 gross sq.m. It is anchored by a Tesco Extra store (9,000 gross sq.m.), 40% of which is assigned to the sale of household durables. There are 6 small units (newspaper outlet, butcher, pharmacy, barbers, beauty salon and medical unit) adjoining Tesco, together with a standalone filling station. In addition there is a separate group of 3 retail warehouses (DID, Petshop and bed shop) totaling 2,900 gross sq.m., as well as freestanding Burger King and Costa Coffee units in the complex.

It has direct access off the N2 via a signalised right turning lane and free parking for 560 vehicles.



Figure 3.7a Clearwater Retail Park – Foodstore



Figure 3.7b Clearwater Retail Park – Retail warehousing

Gulliver’s Retail Park

The 14,000 gross sq m retail park and standalone neighbourhood centre (1,700 gross sq m) opened in 2006/2007. It has 600 free parking spaces and is the nearest competing centre to Ballymun. The retail park is anchored by Homebase and other tenants include

Toybox, Hickeys Home Focus, Petmania, Eco Interiors and a Furniture Liquidator unit. One of the original occupants of the retail park (Curry's) has since relocated to Airside Retail Park. The neighbourhood centre is anchored by Eurospar (circa 740 gross sq.m. on the groundfloor) and contains an in-house Subway outlet. In addition to Eurospar, the neighbourhood centre accommodates Costa Coffee, a medical unit & pharmacy, dry cleaners and a beauty salon. There is also a free-standing drive-thru McDonald's fast food restaurant to the rear of Eurospar.



IKEA

Having opened in 2009 the 32,000 gross sq m store has 1,850 free parking spaces. IKEA disclosed that some 18 per cent of its 520 strong workforce (over 90 employees) comes from Ballymun – a figure which is testament to the close working relationship IKEA had with Ballymun Regeneration Limited and Ballymun Job Centre. It is located on land zoned for retail warehousing in the Fingal County Development Plan 2011-2017 and is estimated to attract around 2.5 million visitors a year. Its national appeal is illustrated in the addresses revealed by the AECOM vehicle licence plate surveys carried out over two

days for this study (see Appendix 1) Discussions with IKEA indicate that its primary catchment generally correlates with a 20 minute drive band and comprises the counties of Dublin, Meath, Louth, Kildare and Wicklow. Approximately 80% of its customer trade comes from these counties. As a measure of its success, trade has increased by over 10 per cent between September 2014 and September 2015.



Figure 3.9 Ballymun IKEA

The overall amount of retail floorspace and parking provision in the foregoing retail centres is outlined in Table 3.1.

Table 3.1: Summary information on the main retailing centres

Shopping Centres	Size (gsm)	Parking Spaces
Ballymun	4,000	450 free/pay*
OMNI	23,225	1,500 free
Charlestown	16,000	800 pay
Clearwater	12,000	560 free
Gulliver's	15,700	600 free
Ikea	32,000	1,850 free

*Note – this excludes the 200 mainly residential & private spaces at Santry Cross

Aldi

There are two Aldi stores within convenient drive time distance of Ballymun – at St Margaret’s Road and at Santry Avenue. They are standardised convenience stores (circa 1,500 gross sq m) that concentrate on selling limited product lines in bulk. Both are very popular with high parking occupancy rates observed at the weekends. The St Margaret’s Road store shares its parking area with a row of local shops and services.

Lidl

As with Aldi, Lidl also has two stores that are within convenient drive time reach of Ballymun. However, unlike the Aldi stores, which would benefit from right-turning lanes, convenient access to Lidl’s properties exists from a roundabout on St Margaret’s Road and via traffic signals at OMNI Shopping Centre.



Neighbourhood Centres - Ballymun

There are 4 purpose built neighbourhood centres (NCs) dispersed throughout Ballymun - Poppintree, Sillogue, Coultry and Shangan. Three of these are anchored by retail chains affiliated to Musgraves, namely Centra and Daybreak.

The four NCs in the Ballymun area are mainly intended to provide locally accessible retail services to residents, particularly the less mobile members of the community. This is in keeping with the role identified for them at the national level:

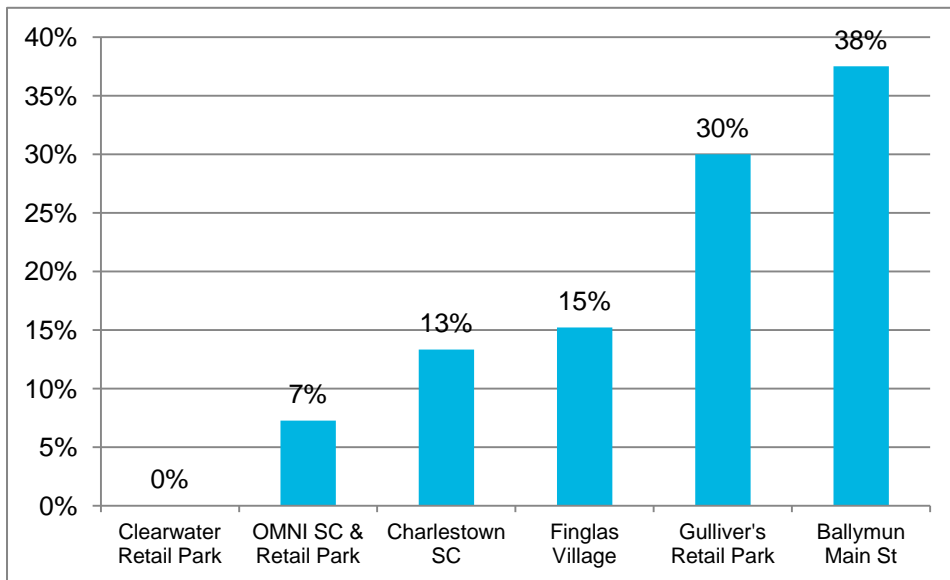
*“Local retail units such as corner shops or shops located in local or neighbourhood centres serving local residential districts perform an important function in urban areas. Where a planning authority can substantiate the local importance of such units in defined local centres, they should safeguard them in development plans, through appropriate land-use zoning. Development management decisions should support the provision of such units, particularly where they encompass both food-stores and important non-food outlets such as retail pharmacies, and have significant social and economic functions in improving **access to local facilities especially for the elderly and persons with mobility impairments, families with small children, and those without access to private transport**” (Section 4.11.6, Retail Planning Guidelines)*

3.3 Health of existing centres

Vacancy rates

The most significant indicator of the health of existing centres is the level of vacancy. Reference to Figure 3.11 reveals that the highest level of vacancy (38% of all units) is observed in Main Street, Ballymun. In some respects this rate is skewed by the preponderance of vacant units (9 units) to the rear of Ballymun Plaza on Coultry Road. Their omission from calculations would reduce the vacancy rate to 25%. In contrast to Ballymun Main Street, low vacancy rates at Clearwater and OMNI are symptomatic of buoyant trade. Also, discussions with the Manager of Charlestown Shopping Centre would suggest that contracts for the occupancy of its four vacant units, which accounts for a 13% vacancy rate, are near completion.

Figure 3.11 Percentage of vacant units in large retail centres



The Ballymun vacancy figure includes all those units contained within the four purpose-built mixed use developments known as College View, the Plaza, Civic Centre and Santry Cross. They contain 48 units the majority of which (over 80%) are privately owned.

Vacancy levels at Santry Cross, which constitutes the smaller commercial node with Ballymun District Centre, are particularly pronounced (see Figures 3.12a & 3.12b).

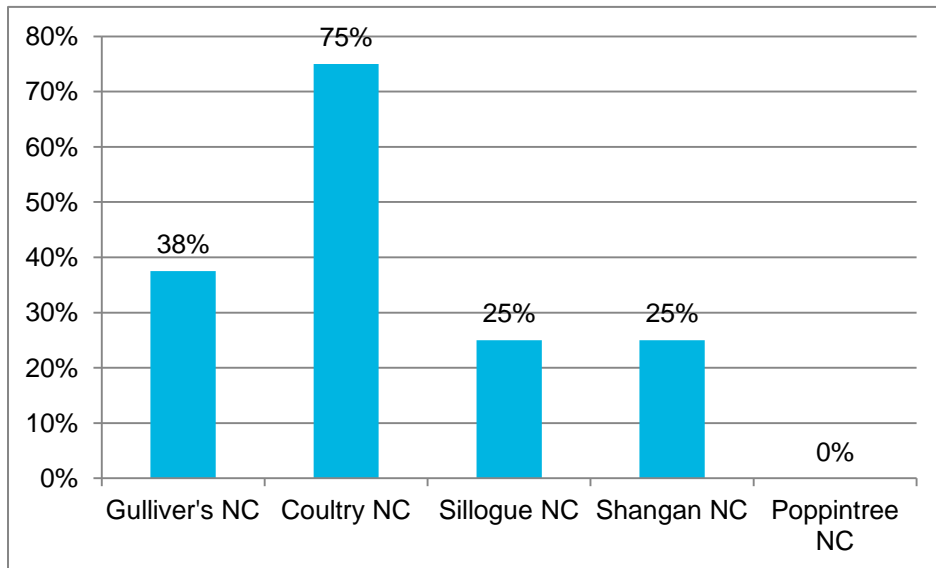


It is noted that another three units at Santry Cross are likely to become vacant in the near future. One unit is currently housing Pieta House on a temporary basis and is likely to

become vacant in the first half of 2016. In addition, the two eco units are likely to become vacant in early 2017 with their transfer to the boiler house site, which is being redeveloped to accommodate the relocation of the Discovery Centre.

With the exception of the Eurospar anchored Neighbourhood Centre at Gulliver's Retail Park, which comprises 8 units, most Neighbourhood Centres in Ballymun contain between 4 and 5 units. Figure 3.13 shows that Poppintree NC is performing best with zero vacancies and Coultry NC is the poorest, with three quarters of its units vacant. The NCs at Sillogue and Shangan each have one unit vacant. Latest information indicates that a café may open at Coultry NC subject to planning permission being granted.

Figure 3.13 Percentage of vacant units in Neighbourhood Centres



The plight of Ballymun neighbourhood centres is no different to that of similar centres elsewhere. They suffer from the combined effects of the centralisation of retailing into fewer larger units and centres, plus the growing appeal of stop and shop filling stations. Nevertheless, they do still perform a vital local service and their contribution in this regard remains important.

Rental values

Rental values also provide an indication of the appeal of a retail location but they vary considerably according to a range of factors, including:

- the size and specific location of the unit e.g. a unit located near an anchor unit will pay appreciably more rent;
- the type of shopping taking place within the unit e.g. foodstore versus retail warehousing; and
- the anticipated turnover of the unit. This applies mostly to units within shopping centres but in today's depressed market it is a significant consideration for occupancy of any unit.

Mindful of these variations it is sufficient to state that the highest rents are charged at OMNI (in excess of €35 psf), then Charlestown (circa €30 psf), with an approximate rental range of between €25 and €30 psf characterising centres like Ballymun Main Street and Finglas Village Centre.

3.4 Conclusion

Not surprisingly, given the demise of Ballymun Shopping centre, a limited range of shopping provision is now available in Ballymun. At present, there is only one brand of food retailing on offer in the area, namely shops aligned to the Musgraves grocery wholesaler. There is also a near total absence of comparison goods retailing, the most salient indicators of which are vacant units and the stark lack of Main Street vitality at weekends. Added to this, it is evident that Ballymun is facing significant shopping competition from surrounding retail centres. Against this background, therefore, the succeeding sections of this Retail Study seek to ascertain if there is any potential for Ballymun to recover some of this lost retailing ground.



PART B: Household Shopper Survey

04

Household Shopper Survey

4.1 Introduction

An integral component of the study involved the carrying out of a household shopper survey of the Ballymun and north Glasnevin area. It was targeted at acquiring facts on shopper behaviour and obtaining views from the local shopping public. Gathering this information was critical for a comprehensive and robust understanding of shopping patterns in the area.

4.2 Methodology

The survey involved the commissioning of an independent research body, Strategic Marketing, to carry out a landline and mobile telephone survey of 400 shopper households in the study area. It was based on a stratified random sample of the population residing in the 6 Ballymun electoral divisions (EDs) named Ballymun A-F and the 4 neighbouring EDs (Ballygal C, Whitehall A, Whitehall B and Airport). A map showing the geographical coverage of these EDs is contained in Section 3.0 (Figure 3.1).

The number of persons surveyed from each ED is shown in Table 4.1. The number in each had regard to the population size found therein and was weighted in favour of the Ballymun EDs so as not to skew the overall results. In terms of its reliability, the sample size accords with a 95 per cent confidence level, resulting in only a standard 5 per cent margin for error in the findings. The sample size of 400 also needs to be appreciated against a February 2015 survey of 1600 shoppers by the National Transport Authority (NTA) for the whole of Dublin City Centre.

Table 4.1: Number of interviewees in each Electoral Division (based on 2011 Census figures)

Council	Local Electoral Division	No. of Interviewees	2011 Population
Dublin City	Ballymun A	53	3,678
Dublin City	Ballymun B	62	4,012
Dublin City	Ballymun C	88	5,585
Dublin City	Ballymun D	38	2,961
Dublin City	Ballymun E	25	1,582
Dublin City	Ballymun F	37	2,323
Dublin City	Ballygal C	33	3,419
Dublin City	Whitehall A	22	3,545
Dublin City	Whitehall B	29	3,892
Fingal CoCo	Airport	13	4,032
	Total	400	35,029

Questionnaire

The survey consisted of 23 questions to be completed during a 15-20 minute phone call (a copy of the questionnaire is attached in Appendix 2). The questions were aimed at identifying shopper profiles, garnering shoppers' views and eliciting facts on shopper

behaviour. The latter was especially important for the identification of shopping patterns in the area, in terms of establishing where people were shopping for their groceries and non-food items.

Results

Aggregate results were provided for the sample size as a whole, together with detailed results for each of the EDs surveyed. Three quarters of the respondents were female. A summary of the key findings is separately documented below for convenience goods shopping and comparison goods shopping, while a breakdown of the full tabulated recordings is included in Appendix 3.

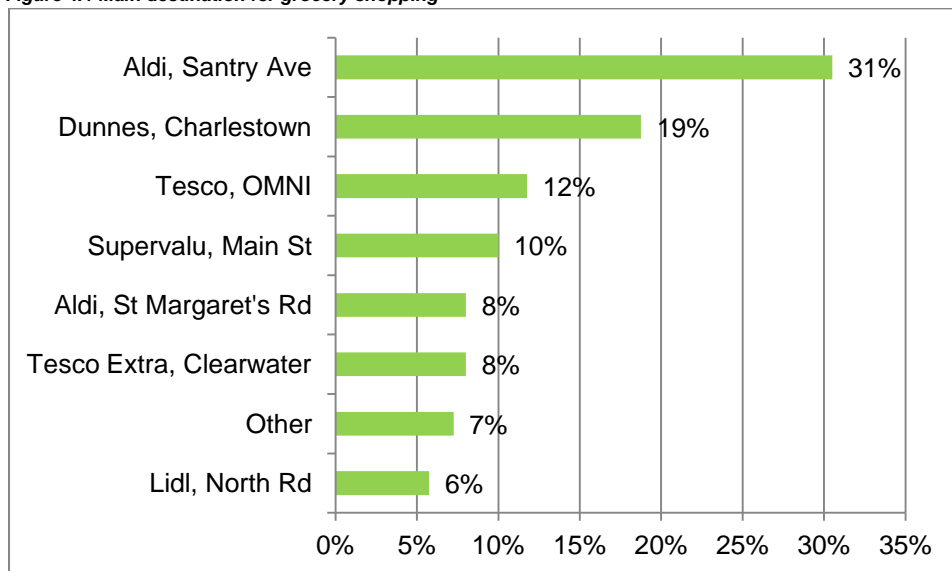
4.3 Convenience goods shopping

The main survey findings in respect of convenience goods shopping are outlined below.

Main food shopping location

The survey revealed that Aldi in Santry Avenue is the most popular foodstore (31% of respondents cited it as their main foodstore) followed by Dunnes at Charlestown (19%), Tesco at OMNI (12%) and Supervalu on Ballymun Main Street (10%). Aldi in Santry Avenue attracts residents from Glasnevin Avenue (21%) and north of Collins Avenue Extension (34%). The full list of recordings is shown in Figure 4.1.

Figure 4.1 Main destination for grocery shopping

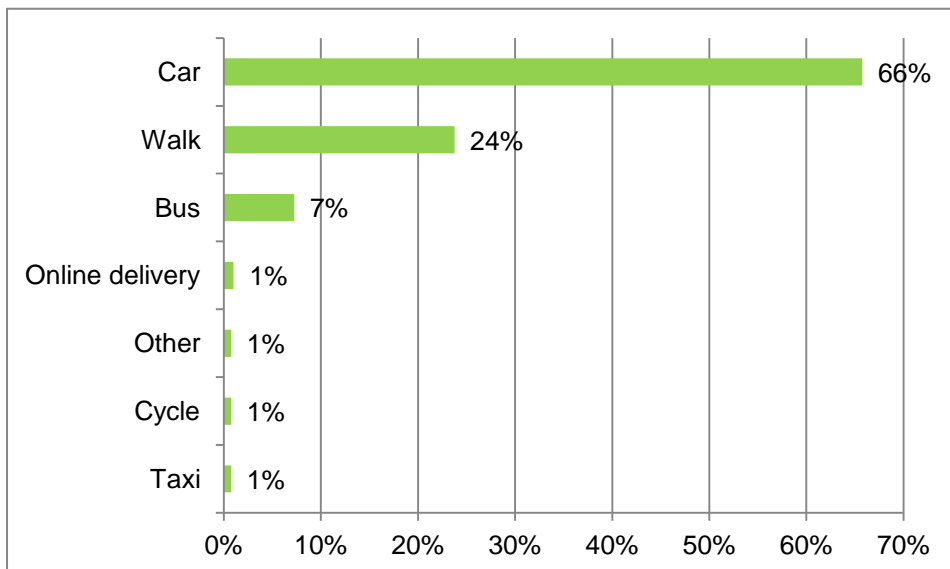


Based on the above findings, together with the results for top-up shopping (see later in this section) it can be estimated that at least **75 per cent of expenditure on convenience goods** leaks from the Ballymun catchment to competing nearby shopping locations.

Mode of travel & Journey time

In keeping with national trends the car is the most popular form of transport for food shopping trips (66%), followed by walking (24%) and bus (7%). The high incidence of walking reflects the comparatively low level of car ownership in Ballymun and in Dublin City generally. According to the 2011 census the proportion of households without a car in Dublin City was more than twice the national average (38.2% v 17.6%).

Figure 4.2 Mode of travel for convenience goods shopping



The overriding majority of food trips (83%) takes 15 minutes or less to undertake.

Reason for store selection

Convenience is the main reason for food shopping at a particular location (53%). Reasonable price is next highest reason (33%), which may help to explain the popularity of the Aldi store at Santry Avenue.

Relationship with other shops

When undertaking the main food shopping trip 31% of respondents stated they visited other food shops, with less than a quarter (23%) visiting other non-food shops.

Only 5% stated that they visited eateries when shopping for groceries, which is not surprising due to need to refrigerate chilled/frozen goods that have been purchased.

Expenditure

The survey results suggest that 6 in 10 households in Ballymun spend approximately €80 on their weekly food bill, which, when divided by the average household size of 2.7, equates to €30 per head. While this level of expenditure is below the national average key retailers in the area universally verified this figure and the low purchasing power in Ballymun generally.

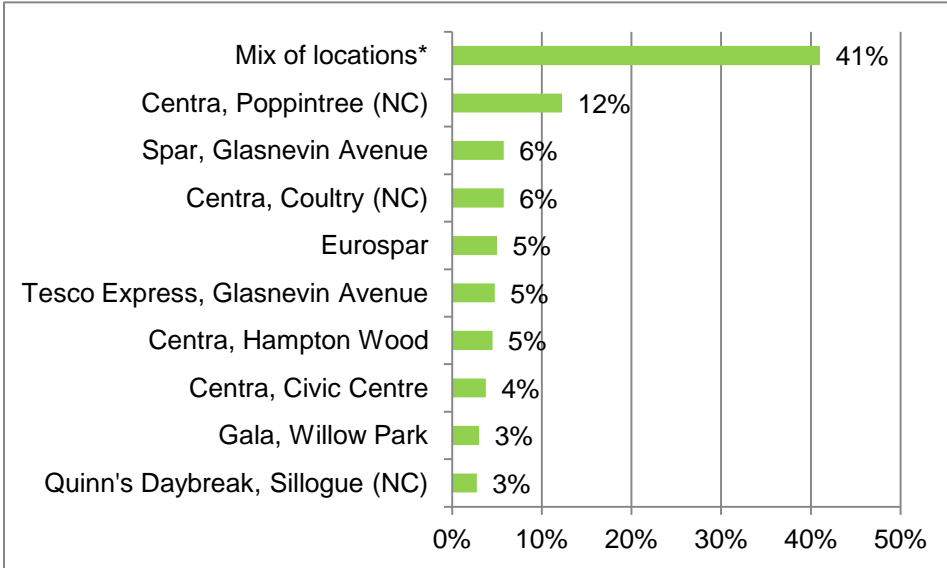
Online shopping

Approximately 5% of people in the survey area shop online for their groceries. Data from Eurostat in 2012 recorded that 6% of people in Ireland shopped online for groceries, which was double the figure in 2008 (3%). Equivalent figures for the UK estimate this type of online shopping at 7.5%.

Top-up convenience goods locations

When top-up shopping for everyday items such as newspapers, milk and bread 4 in 10 shoppers avail of a mix of locations, including those retail centres where they undertake their weekly shopping trip (Figure 4.3). This particularly applies to the Supervalu store on Ballymun Main Street, with a fair proportion of those surveyed (54 persons) stating that they also do their top-up shopping there.

Figure 4.3 Location of top-up convenience goods shopping



Note: * includes shops where main weekly shopping is also carried out

Figure 4.3 also illustrates that the Centra store at Poppintree Neighbourhood Centre (12%) is twice as popular as other Neighbourhood Centres for top-up shopping.

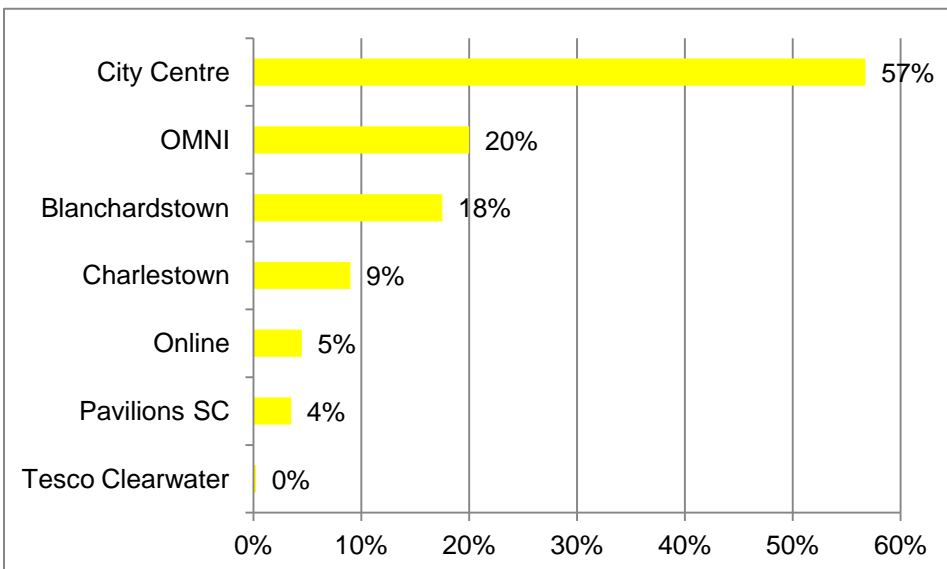
4.4 Comparison goods shopping

The chief survey findings in relation to comparison goods shopping are recorded below.

Main non-food shopping location

Dublin City Centre is the most popular destination for comparison goods shopping (57%) followed by OMNI (20%), Blanchardstown (18%) and then Charlestown (9%).

Figure 4.4 Main destination for comparison goods shopping

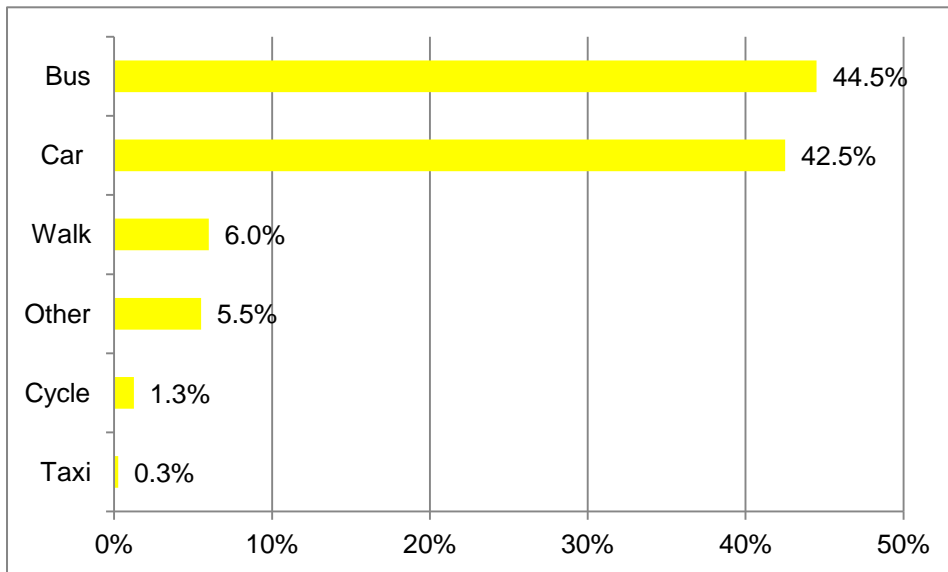


Not surprisingly, Ballymun Main Street does not feature in the findings, as currently there are very few comparison goods shops trading there. This in part can be attributed to the demise of the Shopping Centre. Indeed, it can be estimated from the survey findings that the vast bulk of this type of retail expenditure (in excess of 90%) leaks to competing centres outside Ballymun.

Mode of travel & Journey time

Given the attractiveness of Dublin City Centre for comparison goods shopping it is not unusual to find that 45% of respondents in Ballymun travel by bus for such trips. This finding resonates with a February 2015 National Transport Authority survey of City Centre shoppers which recorded that 42% of people arrived by bus.

Figure 4.5 Mode of travel for comparison goods shopping



Understandably, therefore, the Ballymun survey recorded that journey times for comparison goods shopping are longer than for convenience goods shopping trips (i.e. half take between 15 and 30 minutes).

Reason for store selection

Comparison goods shopping involves comparing the quality and price of goods. As expected therefore the range of goods was cited as the main reason (61%) for choosing to shop at a particular location. It far exceeds the next important factor of convenience (25%).

Relationship with other shops

When shopping for comparison goods 32% of people also go for something to eat or drink. This finding correlates with the 2012 online survey conducted by DCC which noted that visitors to Dublin City Centre rated eating out as highly as shopping.

Bulky goods shopping

The survey revealed that locations which accommodate the grouping of large retail units, such as Airside Retail Park, represent the greatest attraction for bulky goods shoppers. In respect of electrical items specifically, Power City in Finglas proved exceptionally popular with residents of Ballymun.

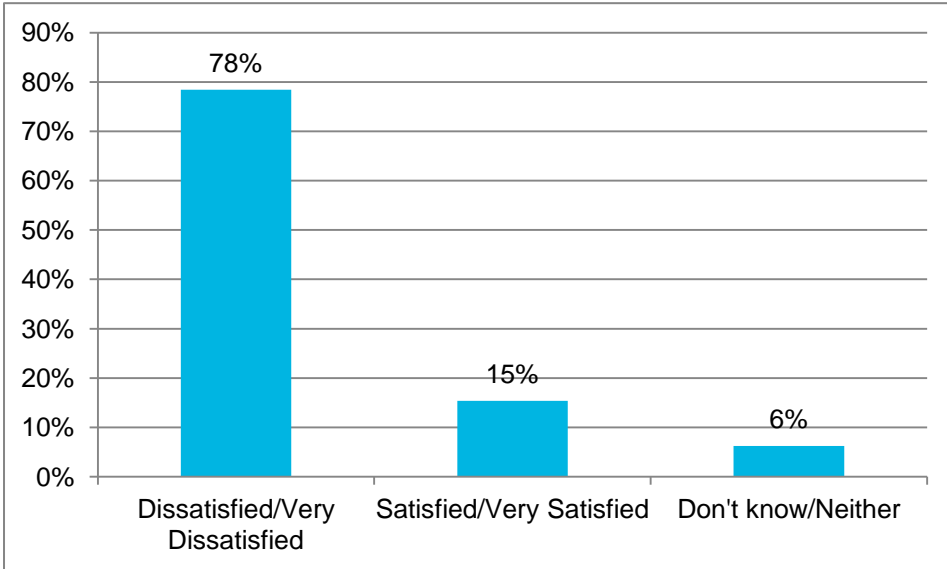
Online shopping

As with convenience goods shopping approximately 5% of shoppers stated that they did the bulk of their non-food shopping online. When probed later on the percentage of money spent online (Q15) it became evident that a quarter of respondents carried out an ancillary proportion (circa a tenth) of their comparison goods retailing on the internet. This is in keeping with the Eurostat data for 2012, which recorded that 26% of people in Ireland shopped online for some of their clothes and shoes. Interestingly, Eurostat recorded that this 26% figure was more than double the 2008 figure (11%).

4.5 Views on shopping

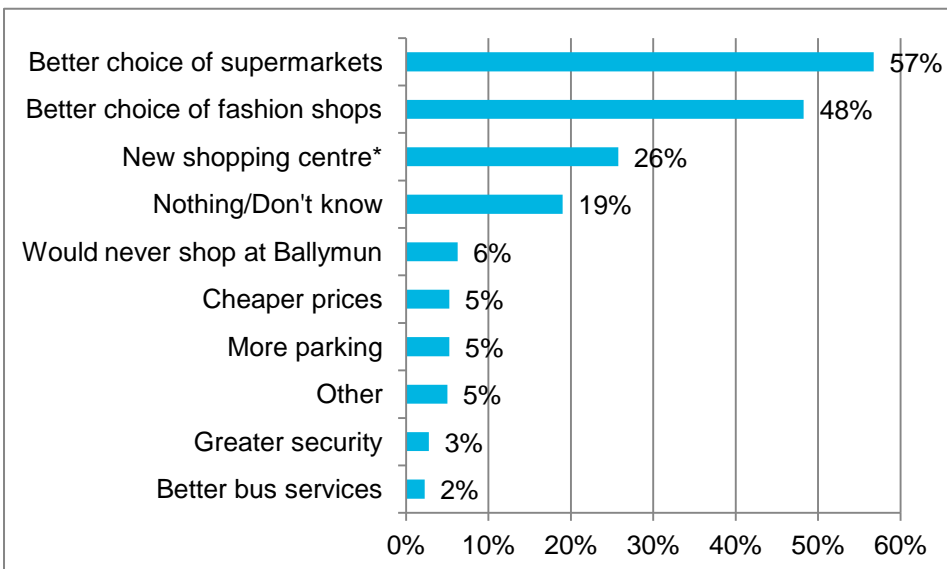
Of those people who shop in Ballymun only 15% stated that they were satisfied/very satisfied with shopping facilities, with most (78%) expressing dissatisfaction (see Figure 4.6). Perhaps as a reflection of its current lack of appeal approximately 8 out of every 10 shoppers surveyed in those areas outside of the Ballymun electoral divisions A-D said they never shopped in Ballymun.

Figure 4.6 Opinion on existing shopping in Ballymun



The limited range of shopping available was the most common reason for peoples' dissatisfaction. Consequently, when questioned on how shopping could be improved, **half the respondents cited the need for more shops**, with a quarter expressly stating the need for a new shopping centre (see Figure 4.7). The fact that half of the interviewees expressly cited a demand for more retailing is quite important. Based on this finding it can be inferred that new retail development in Ballymun has the potential to claw back half of the expenditure that is leaking to other centres.

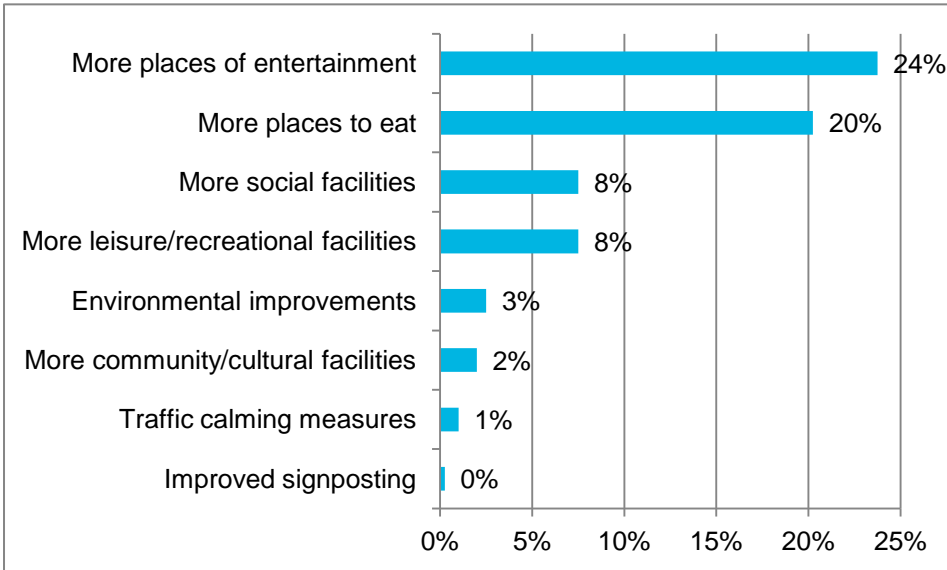
Figure 4.7 Suggestions to improve shopping in Ballymun



Note: * this response is disaggregated from the "other" category and was stated without any prompting

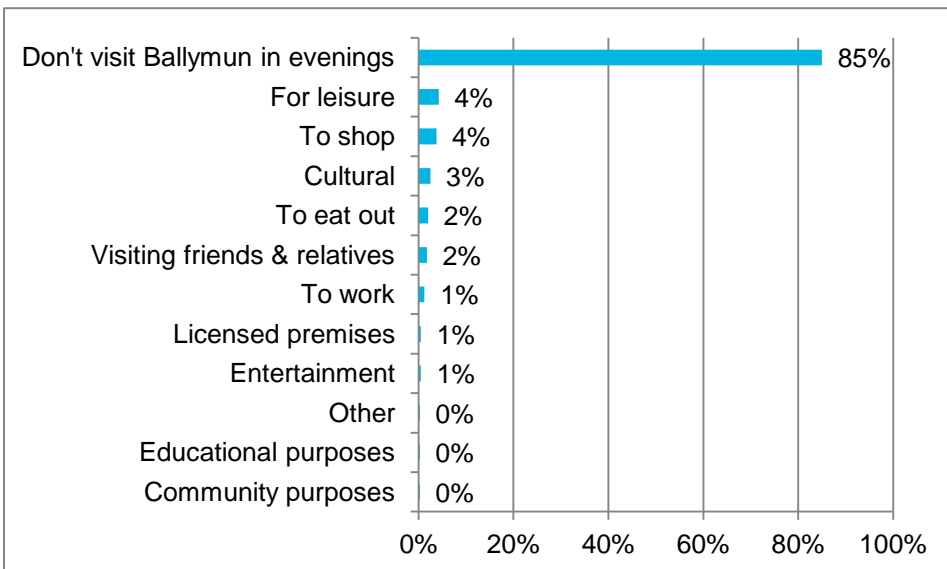
Other than new shopping facilities a fair proportion of people stated the need for new places of entertainment, notably a cinema (24%) and places to eat and drink (20%) such as a coffee house and family friendly restaurant (see Figure 4.8). The social facilities cited by 8% of the people related to more public houses, which is not an unexpected response given the closure of The Tower’s pub at the shopping centre.

Figure 4.8 Suggestions to improve Ballymun overall



A staggering 85% of people do not visit Ballymun in the evening (see Figure 4.9). Of those who do, shopping, going to the leisure centre and to the theatre constitute the main reasons why.

Figure 4.9 Proportion of people who visit Ballymun in the evenings



4.6 Conclusion

The results of the household shopper survey provide robust empirical evidence of shopping patterns in the Ballymun area. They put technical flesh on the bones of anecdotal observations on the ground. The output of the survey is particularly helpful in quantifying the extent of expenditure leakage from the area. Importantly, the survey findings allow for the incorporation of locally based assumptions for the assessment of future retail floorspace need in Ballymun, which follows in the next section of this Retail Study.

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Retail Floorspace Projections

05

Retail Floorspace Projections

5.0 Introduction

This section of the Study details a supply and demand analysis that aims to assess the capacity for additional retail floorspace in Ballymun up to the year 2022. The analysis involves examination of the following factors:

- Population change;
- Expenditure levels;
- Turnover forecasts (sales densities);
- Impact from internet shopping;
- Shopping patterns from survey.

In relation to the surveyed shopping patterns, the results of the shopper household survey yielded localised data relating to:

- weekly expenditure levels on grocery items;
- the market share of retailers;
- the proportion of consumer leakage from the area;
- public demand for more shopping provision.

All of this information is extremely useful in substantiating assumptions for the assessment of retail floorspace need in Ballymun.

5.1 Approach to projecting floorspace need

In the interest of sensitivity testing and adopting a flexible approach to statistical forecasting, a range of retail floorspace projections for both convenience goods shopping and comparison goods shopping is required. A range allows for the estimation of a low and high floorspace requirement. Retail analysts often refer to these extremes as indicative of a worst case or pessimistic scenario and a best case or optimistic scenario. As far as Ballymun is concerned the worst case scenario is warranted on the basis of the surveyed low levels of retail expenditure in the area. A best case scenario for Ballymun takes on board the possibility of an improvement in the economy, additional expenditure from workers and students in the area and an increase in population from new housing development. In relation to the latter the Draft Dublin Development Plan 2016-2022 (p10) points to a capacity for another 3,000 residential units in Ballymun.

Having stated the above it is important to note that the high floorspace projections are not intended to function as floorspace caps. Rather, as recognized in the 2012 Retail Planning Guidelines (section 3.6) the floorspace estimates are intended to provide broad guidance on floorspace need and should not serve to inhibit competition.

5.2 Population

For the purpose of retail floorspace projections the catchment of Ballymun is considered to include the 6 electoral divisions (EDs) named as Ballymun A to F. Although it is recognised that administrative boundaries do not necessarily correspond with shopper catchments, it is reasonable to contend that Ballymun is entitled to compete for a share of shopping expenditure generated by its own electoral population. In 2011, the population amounted to approximately 20,000 people. A more up to date population recording will soon become available once the 2016 Census is carried out in April 2016.

The latest census results for the years 2006 to 2011 (Table 5.1) indicate that population growth in Ballymun was 0.6% per annum, which was roughly in line with Dublin City Council as a whole (0.8% per annum).

Table 5.1: Population Change in Ballymun relative to Dublin and the State

	2006	2011	Annual % Change
Ballymun area ¹	19,517	20,141	0.6%
Dublin City Council	506,211	527,612	0.8%
Dublin ²	1,187,176	1,273,069	1.4%
State	4,239,848	4,588,252	1.6%

1. Ballymun Electoral Divisions A-F

2. Includes all 4 Councils (Dublin City, Dun Laoghaire-Rathdown, Fingal, South Dublin)

Closer inspection (Table 5.2) reveals marked differences within the Ballymun area as a result of the area's regeneration and relocation of residents. New housing development at Hampton Wood (off St Margaret's Road) resulted in the highest population increase (75%) in the ED described as Ballymun A between 2006 and 2011. In contrast, demolition in the Sillogue Road area accounted for the biggest decrease in the ED known as Ballymun D (minus 15.9%).

Table 5.2: Population Change within Ballymun area by Electoral Division

Electoral Division	2006	2011	% Change 2006 - 2011
Ballymun A	2,101	3,678	75.1%
Ballymun B	3,949	4,012	1.6%
Ballymun C	5,921	5,585	-5.7%
Ballymun D	3,522	2,961	-15.9%
Ballymun E	1,550	1,582	2.1%
Ballymun F	2,474	2,323	-6.1%
Total	19,517	20,141	3.2%

The latest regional population growth forecasts released by the Central Statistics Office (CSO) in December 2013 estimate that population in Dublin will increase by 0.9% per annum between the period 2011 and 2031. For best case forecasting purposes it is assumed that population growth in the Ballymun area will be on par with this average rate for Dublin. The incorporation of a higher rate of growth for the best case analysis takes into account the possibility of appreciable levels of new housing development taking place in the near future. Worst case projections will be based on the slightly lower rate of population growth recently observed at the local level (0.6% per annum).

5.3 Expenditure

Information at the national level exists for various categories of consumer expenditure; however there is no definitive aggregate breakdown for expenditure on convenience goods and comparison goods.

Despite this shortcoming, the regularity of expenditure on groceries means that a reasonable estimate can often be made for convenience goods shopping. However, given the irregular, leisure based dimension to the purchase of comparison goods, the amount of money spent on these items is more difficult to estimate and subject to varying interpretations.

Expenditure on Convenience goods

One of the most up to date sources of consumer expenditure is the 2014 National Income and Expenditure Report (NIER) produced by the CSO. Inspection of Table 14 of the NIER indicates that in 2014 the average person spent circa €2,759 per year on convenience goods, which equates to €53 per week. Likewise, figures extrapolated from the Retail Strategy for the GDA point to an annual expenditure on convenience goods of €2,463, which equates to €47 per week. This is similar to that figure yielded by the national Household Budget Survey (€47 per week) which was undertaken in 2009-2010.

However, the shopper survey results for Ballymun indicate that the average person in Ballymun has lower disposable income and spends in the region of €1,540 per year on convenience goods. This is equivalent to €30 per head per week and is considerably below the aforementioned NIER and GDA Retail Strategy figures of €53 and €47 respectively.

The variation in the above expenditure findings underlines the necessity to provide a range of floorspace need projections based on the lower Ballymun figure (to arrive at a low floorspace requirement) and the higher national/regional figure (to arrive at a high floorspace requirement). Incorporation of a higher expenditure figure helps to ensure that the contribution of the 700 plus workforce in Ballymun is also recognised in the floorspace need analysis. Having stated this, their impact on available expenditure is quite modest when it is remembered that future floorspace need in Ballymun is calculated on the basis of a catchment population of approximately 20,000 people.

Expenditure on Comparison goods

While the Ballymun shopper survey did retrieve useful information on comparison goods shopping as a whole, surveys have historically demonstrated that the specific retrieval of expenditure information on comparison goods shopping is very difficult to achieve and prone to inconsistent responses. For these reasons it was not explicitly asked as part of the survey in Ballymun. Instead, the level of expenditure in Ballymun for these goods was based on a published regional figure, which was then proportionally reduced in line with the local survey expenditure figure obtained for convenience goods.

In 2007 the Retail Strategy for the GDA estimated the level of comparison goods expenditure per capita in Dublin City at €3,240. When this figure is updated to the year 2016, the base year for projections, by indexing against real growth rates recorded in Table 14.1 of the NIER (circa 0.2% per annum for comparison goods – see table 5.3) the figure slightly increases to €3,299.

In order to establish a local figure for Ballymun the above regional figure is adjusted downwards on a pro rata basis with the lower convenience goods expenditure figure surveyed for Ballymun, which amounted to approximately 60 per cent of the regional average. It was appropriate to use the regional GDA expenditure figure in this case as the NIER did not provide a sufficiently detailed breakdown of expenditure on comparison goods. The application of this reduction rate gives a 2016 comparison goods expenditure figure for Ballymun of €1,979 per head.

Annual growth in expenditure

As referred to above, when projecting the above expenditure per capita figures for the foreseeable future up to the year 2022 it is necessary to consider published growth forecasts.

While the past two years have seen an appreciable improvement in real growth in expenditure on clothes and footwear and household goods, the overall trend in recent times has been one of negligible growth. Inspection of the NIER 2014 indicates that annual real growth in the overall consumption of goods between 2009 and 2014 was 0.2% (Table 5.3).

Table 5.3: Annual Percentage Changes in Personal Consumption of goods & services

Description	2009 - 2014
Food	1.2
Non-alcoholic beverages	7.3
Alcoholic beverages	0.6
Tobacco	-7.1
Clothing and footwear	0
Housing	1.1
Fuel and Power	-1.8
Household equipment and operation	1.7
Transport and communication	-0.4
Recreation, entertainment and education	-0.8
Miscellaneous goods and services	1.8
Expenditure outside the state	-6.5
Expenditure by non-residents	-1.2
Average	0.2

Source: Table 14.1 National Income and Expenditure Report 2014

In order to portray a worst case scenario it is assumed that this low level of real growth (0.2%) will continue to apply to expenditure on convenience goods and comparison goods in the foreseeable future.

Best case floorspace projections are based on growth rates predicted by leading retail sources such as Experian and Oxford Economics. They collectively forecast a slightly higher growth in expenditure on convenience goods (0.5% per annum) and an appreciably higher rate of real growth in expenditure on comparison goods (circa 4.0% per annum).

5.4 Turnover

Apart from published turnover results for selected multiple chains, as detailed in company listings, there is no authoritative source on turnover information in Ireland and Britain. It is a serious statistical deficiency that undermines the reliability of retail floorspace projections across the board.

Notwithstanding this shortcoming, reference to the aforementioned listings, together with figures published by Oxford Economics (Appendix 4) allows for the generation of 'ballpark' estimates which satisfy the requirements of this broad assessment. While the Retail Strategy for the GDA estimates turnover ratios achieved by shops at circa €12,000 per net sq m for convenience goods and circa €9,000 per net sq m for comparison goods it was appropriate to reduce these turnover ratios (sales densities) to take into account the reduced level of expenditure that evidently exists in the Ballymun area. Accordingly, respective sales densities of €10,000 per sq m (convenience) and €5,000 per sq m (comparison) have been adopted for forecasting purposes. These are largely based on minimum turnover estimates contained in other retail strategies.

5.5 Impact from internet shopping

In theory the growth of online shopping would imply that the need for development of retail floorspace on the ground should decline at a concomitant rate. However, latest research from Britain indicates that there are two reasons why retail floorspace will continue to be built in the foreseeable future.

- Firstly, Oxford Economics predict that the majority of shopping for the next ten years will continue to take place in shops (Appendix 4). This includes over 90 per cent of food shopping and 75 per cent of comparison goods shopping.
- Secondly, most online shopping for convenience goods will still involve deliveries from existing retail stores as opposed to direct despatch from distribution warehouses. However, it must be acknowledged that an increasing proportion of online comparison goods shopping will be sourced directly from the warehouse.

In the light of the above information it is reasonable to assume, certainly for the duration of the Ballymun Local Area Plan, that the majority of retail sales will continue to be sourced from shops.

5.6 Shopping patterns

The Ballymun surveys yielded invaluable information on shopping patterns which could then be translated into integral assumptions for floorspace projections in this assessment.

The most significant finding to emerge from the household shopper survey was the huge level of consumer leakage from Ballymun to competing centres in neighbouring areas. As outlined in Section 4.0, this amounted to 75 per cent of expenditure on convenience goods and at least 90 per cent of expenditure on comparison goods.

The survey also indicated that half of the people in Ballymun expressed a desire for new shops and this finding highlighted the potential to claw back some of this expenditure leakage.

5.7 Assessment of retail floorspace need

Taking into account the above considerations it is possible to estimate the capacity of Ballymun to accommodate new retail development over the period 2016-2022 for both convenience goods and comparison goods.

As explained previously, a range of floorspace need is estimated based on a worst case scenario (based on low and pessimistic predictions) and a best case scenario (based on high and optimistic predictions).

(i) Convenience Goods

Low floorspace requirement

The following assumptions are made for a worst case assessment:

- Population growth in Ballymun will be in keeping with previous years, namely 0.6% per annum.
- The expenditure per capita figure in 2016 will amount to €1,540. This is derived from the survey finding of €80 per week per household spent on convenience goods (i.e. €4,160 annually) and then divided by the average household size of 2.7.
- Real growth in expenditure on convenience goods will be marginal (0.2% per annum as per the recent general trend observed in the NIER-see section 5.3 above) to give a per capita expenditure figure of €1,559 in 2022.
- The leakage of expenditure on convenience goods from the Ballymun area is 75%.
- Half of this leakage can be recovered via the introduction of new retail floorspace to Ballymun. This is based on the survey finding that approximately half the respondents expressed a desire for more shopping facilities (see section 4.5).
- The annual turnover of new convenience goods floorspace will approximate to €10,000 per net sq.m.

Based upon the above considerations it is shown in Table 5.4 that at least **1,258 net sq m (13,500 net sq ft)** of new convenience goods floorspace can be developed in Ballymun by the year 2022.

Table 5.4: Low floorspace requirement for Convenience Goods in Ballymun ~ 2016-2022

		2016	2022
A	Population	20,753	21,511
B	Expenditure per capita	€1,540.74	€1,559.32
C = A x B	Total expenditure in Ballymun area	€31,974,260	€33,542,445
D = C x 0.75	Expenditure leakage from Ballymun area estimated at 75% from survey*	€23,980,695	€25,156,834
E = D x 0.5	Clawback of expenditure leakage by Ballymun estimated at half #	€11,990,347	€12,578,417
F = E/10000	Estimated floorspace need (net sqm) based on turnover of €10,000 psm	1,199	1,258

~ inclusive of Ballymun DEDs A-F

*This is over three times the average

approximates to proportion of surveyed people who wanted more shopping

Please allow for minor numerical discrepancies due to computerised calculations.

Table 5.5: High floorspace requirement for Convenience Goods in Ballymun ~ 2016-2022

		2016	2022
A	Population	21,064	22,227
B	Expenditure per capita	€2,463.13	€2,537.96
C = A x B	Total expenditure in Ballymun area	€51,882,997	€56,411,600
D = C x 0.75	Expenditure leakage from Ballymun area estimated at 75% from survey*	€38,912,247	€42,308,700
E = D x 0.5	Clawback of expenditure leakage by Ballymun estimated at half #	€19,456,124	€21,154,350
F = E/10000	Estimated floorspace need (net sqm) based on turnover of €10,000 psm	1,946	2,115

~ inclusive of Ballymun DEDs A-F

*This is over three times the average

approximates to proportion of surveyed people who wanted more shopping

Please allow for minor numerical discrepancies due to computerised calculations.

High floorspace requirement

When the above exercise is reworked in Table 5.5 on the basis of a higher regional GDA expenditure figure (€2,463 per capita in 2016), a slightly higher real growth in expenditure of 0.5% per annum to give a per capita expenditure figure of €2,537 in 2022 and regional population projections for the GDA (0.9% per annum), instead of local findings for Ballymun, the floorspace capacity for convenience goods increases to **2,115 net sq m (22,700 net sq ft)**.

Overall, therefore, it is estimated that there is capacity to add between **1,258 and 2,115 net sq m** of convenience goods floorspace to Ballymun during the period of the LAP.

(ii) Comparison goods

The same low and high forecasting approach to the assessment of floorspace need can be undertaken for comparison goods.

Low floorspace requirement

The following assumptions are made in the assessment:

- Population growth in Ballymun will be in keeping with previous years, namely 0.6% per annum.
- The expenditure per capita figure in 2016 will amount to €1,979. This amounts to 60% of the GDA figure of €3,299. The reduction is intended to reflect the lower income profile of the Ballymun area and is indexed to the local survey finding on expenditure for convenience goods.

- Real growth in expenditure on comparison goods will be marginal (0.2% per annum as per the recent general trend observed in the NIER-see section 5.3 above) to give a per capita expenditure figure of €2,003 in 2022.
- The leakage of expenditure on comparison goods from Ballymun is 90%.
- A fifth of this leakage can be clawed back via the introduction of new retail floorspace. This estimate is based on the realistic assumption that recovery of expenditure on comparison goods will be more modest and below that for convenience goods, given the attraction of Dublin City Centre and other large retail centres for this type of shopping.
- The turnover of new comparison goods floorspace will approximate to €5,000 per net sq.m.

Based upon the above considerations it is shown in Table 5.6 that at least **1,551 net sq m (16,600 net sq ft)** of new comparison goods floorspace can be developed in Ballymun over the next six years.

High floorspace requirement

When the above exercise is repeated on the basis of regional GDA expenditure figures (€3,299 per capita in 2016), a real growth rate in expenditure of 4% per annum to give a per capita expenditure figure of €4,174 in 2022 and population projections for the GDA (0.9% per annum), as opposed to local findings for Ballymun, the capacity increases to **3,340 net sq m (35,000 net sq ft)**.

Therefore, it is estimated that there is capacity to build between **1,551 and 3,340 net sq m** of comparison goods floorspace in Ballymun by the year 2022.

Table 5.6: Low floorspace requirement for Comparison Goods in Ballymun ~ 2016-2022

		2016	2022
A	Population	20,753	21,511
B	Expenditure per capita	€1,979.40	€2,003.27
C = A x B	Total expenditure in Ballymun area	€41,077,547	€43,092,205
D = C x 0.9	Expenditure leakage from Ballymun area estimated at 90% from survey*	€36,969,792	€38,782,984
E = D x 0.2	Clawback of expenditure leakage by Ballymun estimated at a fifth	€7,393,958	€7,756,597
F = E/5000	Estimated floorspace need (net sqm) based on turnover of €5,000 psm	1,479	1,551

~ inclusive of Ballymun DEDs A-F

*This is not an unusual level of leakage compared to other District Centres

Please allow for minor numerical discrepancies due to computerised calculations.

Table 5.7: High floorspace requirement for Comparison Goods in Ballymun ~ 2016-2022

		2016	2022
A	Population	21,064	22,227
B	Expenditure per capita	€3,299.81	€4,174.04
C = A x B	Total expenditure in Ballymun area	€69,485,406	€92,777,066
D = C x 0.9	Expenditure leakage from Ballymun area estimated at 90% from survey*	€62,536,865	€83,499,359
E = D x 0.2	Clawback of expenditure leakage by Ballymun estimated at a fifth	€12,507,373	€16,699,872
F = E/5000	Estimated floorspace need (net sqm) based on turnover of €5,000 psm	2,501	3,340

~ inclusive of Ballymun DEDs A-F

*This is not an unusual level of leakage compared to other District Centres

Please allow for minor numerical discrepancies due to computerised calculations.

5.8 Conclusion

The raw data from the up to date household shopper survey has enabled the estimation of the future capacity for additional retail development in Ballymun on the basis of reliable information. In particular, proper account has been taken of two significant characteristics of shopping in the Ballymun area. Firstly, expenditure levels are considerably lower than the national and regional average. Secondly, shopper expenditure is leaking from the area at an abnormal rate, especially in respect of convenience goods shopping. Recognition of these shopping patterns has allowed for a practical assessment of the capacity for additional retail development in Ballymun.



**Ballymun - Comparative Analysis with
other District Centres**

06

Ballymun - Comparative Analysis with other District Centres

6.1 Introduction

This section undertakes an overarching appraisal of the strengths and weaknesses of Ballymun so that the study is better able to recognise the possibilities and limitations for retailing in the area. Equipped with this knowledge it is also possible to examine if any lessons can be learnt from the experience of District Centres elsewhere.

6.1 SWOC assessment

The strengths, weaknesses, opportunities and constraints (SWOC) that pertain to Ballymun are tabulated and expanded upon below. These findings were elicited from the consultation process, particularly the meeting with the Ballymun 4 Business (B4B) group as well as research and analysis on the ground. Appendix 5a contains a report of the consultation exercise.

Strengths

Ballymun is a well-established residential community situated next to the M50. The R108 regional road that serves as the functional spine for Ballymun, in terms of conferring it a Main Street, also acts as the conduit to and from the M50 for 12,000 vehicles each day.

Against this background of excellent accessibility, Ballymun possesses a strong civic and community base upon which to expand its retail base. To this end it is assisted by the seasonal spend of students frequenting Dublin City University, accommodation for whom is located nearby, and by the tourist and cultural draw of its two hotels and theatre.

Weaknesses

As far as retailing is concerned the greatest handicap of the area is its weak purchasing power. According to official statistics approximately 4 in every 10 households in Ballymun electoral divisions (EDs) labelled A-F consist of lone parents. Added to this the unemployment rate is 50 per cent higher than the national average. Indeed, in the 2011 census, the Ballymun EDs featured prominently as unemployment blackspots.

Opportunities

There is a significant amount of land in the ownership of Dublin City Council, including the former shopping centre. Bearing in mind that land assembly/acquisition is one of the most problematic issues affecting the delivery of new shopping development the public ownership of key development land affords a significant opportunity for Ballymun to attract retail investment.

There are approximately 34 hectares of undeveloped land available for mixed use commercial and residential development within the Ballymun LAP (including the mixed use shopping centre site) and an additional c.27ha within the adjoining M50 lands. Even allowing for a reduced shopper spend in the area the potential introduction of additional consumers from residential development would clearly have positive implications for retail

floorspace need in Ballymun. At the very least it points to the need for this Study to incorporate a best case appraisal of floorspace need.

In the long term, retail development opportunities in Ballymun may emerge from the development of the Metro North proposal, and the creation of a stop at Ballymun in 10 years' time. A 2015 survey by the National Transport Authority indicated that over half of total retail spend in Dublin City Centre comes from shoppers who arrive by public transport. This finding points to the importance of a reliable public transport system and the contribution that Metro North could make to shopping in Ballymun.

Constraints

The Council area of Fingal extends beyond the M50 and into areas bordering Ballymun. As evidenced by the opening of the Charlestown Shopping Centre, IKEA and Gulliver's Retail Park over the past 10 years Fingal County Council did not stand still while Ballymun underwent regeneration. The inability to effectively control competing retail development in neighbouring Council areas poses a significant constraint to the shopping prospects for Ballymun. The aforementioned retail developments, together with the opening of discount stores in surrounding areas, have significantly eroded the retail market share of Ballymun. If the Ballymun Shopping Centre site is not redeveloped in the short to medium term there could be a negative impact and consequent effect on the wider regeneration of the area.

Table 6.1: Ballymun SWOC Assessment

Strengths
High accessibility (M50 & road infrastructure)
High level of passing traffic
Significant amount of civic investment
Proximity to Dublin Airport (tourist capture by hotels)
Proximity to DCU (student trade)
A strong sense of community and loyalty to local shops & services
Weaknesses
Low disposable incomes
Divisive "Freeway" effect of R108
Lack of a focal point
Stigma/perception of locality
Grey/bland appearance of area
Opportunities
Large amount of development land in Council ownership
Potential for significant residential expansion
Metro North proposal
Constraints
Location at County Council interface
Loss of market share to competing centres
Lack of market appeal
Negative perceptions of statutory bodies and agencies

6.2 Comparative analysis - Key retail messages

Examination of case studies and examples of best practice, including regeneration work carried out by AECOM, allowed for the distillation of key messages for this study. In particular, the experience of District Centres in Sheffield (Darnall and Spital), Manchester (Chorlton) and London (Haringey and Park Royal) cast light on a common approach to planning for retailing in District Centres.

While each district centre has its own unique challenges there are essentially two core themes that underpin the approach of local government to retail regeneration in these locations.

Firstly, it is recognised that the promotion of retailing comprises only one strand of a multifaceted approach to the regeneration of a District Centre.

Secondly, planning for retail development is allied to public realm enhancements and improved management of the area.

A number of consistent messages can be distilled from experience elsewhere, the majority of which are relevant to Ballymun. These include the following:

- **Emphasis is on retaining expenditure on convenience goods within the District Centre catchment.**

District Centres principally rely on strengthening their convenience goods shopping as a means of bolstering retail trade in general.

- **It is not unusual for most expenditure on comparison goods to seep to large centres elsewhere.**

Other District Centres recorded expenditure leakage as high as 95 per cent in respect of shopping for comparison goods. In this regard, the high level of expenditure leakage from Ballymun for these goods is not unusual and should not give undue cause for concern.

- **Focus is on promoting the retail distinctiveness of the area.**

Some of the District Centres possess a strong independent, non-food retail sector that could be built upon. Unfortunately, no such retail sector exists in Ballymun and it is highly questionable whether one could be artificially introduced. Instead, through the development of its Rediscovery Centre and Axis Theatre the distinctiveness of Ballymun is more closely aligned to its cultivation as an Eco and Arts Destination.

The distinctiveness of Ballymun also relates to its transformation from a high density public sector housing project in the 1960s to a suburban community that commands high accessibility to Dublin City Centre, the M50 and Dublin Airport. In many respects the verticality of the demolished tower blocks has been replaced with the imposing scale and massing of civic and mixed use buildings. It is the commanding presence of these buildings, together with the huge level of public investment and strong sense of identity in the area, which also helps set Ballymun apart from other District Centres.

- **Attention is placed on:**
 - Environmental improvements & public realm enhancements;
 - Cleanliness & greening of area;
 - Increased security, including improved lighting and policing.

All of the above considerations are pertinent to Ballymun. The maintenance of a safe, clean environment generates a feel-good factor and encourages people to shop at home.

6.3 Consultation

In addition to the survey of the shopping public in Ballymun a range of bodies and individuals were consulted during the preparation of the Retail Study. This included the North West Area Committee, the Civic Alliance, the Ballymun for Business (B4B) group and key stakeholders in the retail and business sectors. The latter sectors included the managers of the main shopping centres in the area, the Axis Theatre and commercial agents. Overall, the input from this invaluable consultation process ensured that the objective output of this Study was mindful of the community's development aspirations for Ballymun, as well as the business realities on the ground. Appendix 5a contains full details of each consultation.

6.4 Conclusion

The benefit of carrying out the above SWOC analysis relates to its assistance in helping to practically evaluate what can and cannot be achieved under the retail study for Ballymun. In assessing the scope for retail development regard therefore needs to be given to the socio-economic reality on the ground, the competition posed by other retail centres nearby, and the experience of other District Centres.

Experience in District Centres elsewhere indicates that Ballymun is not alone in hemorrhaging non-food trade to competing centres. It also indicates that retail regeneration not only consists of retail development but of related improvements in the public realm and District Centre management.

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PART C: Strategic Guidance

07

Strategic Guidance – the Way Forward

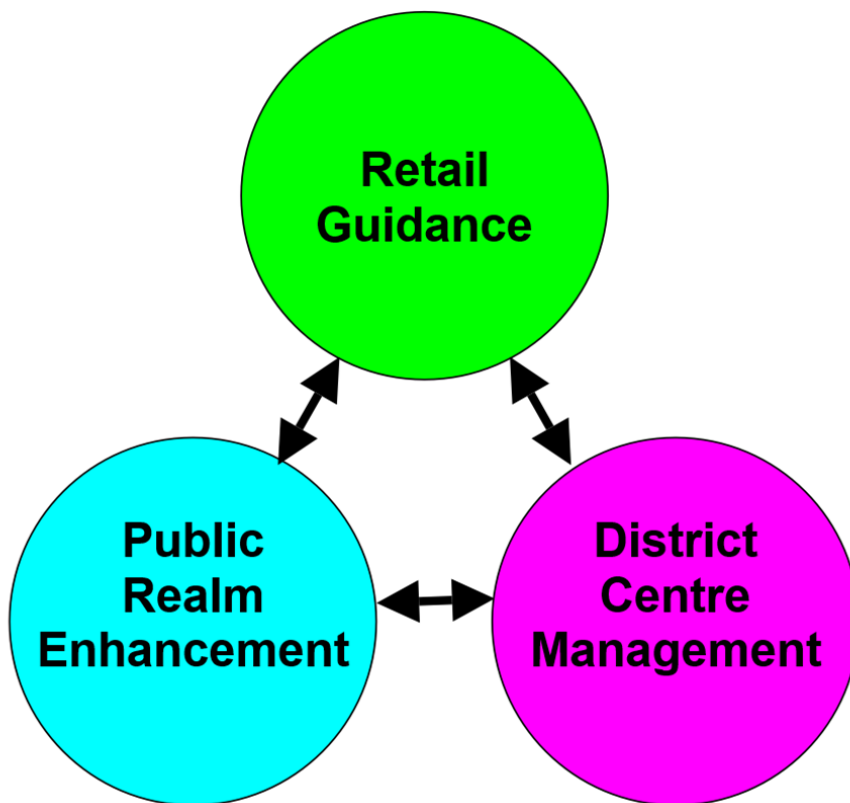
7.0 Introduction

Taking on board all the foregoing research and analysis, together with the output of the consultation process, this section of the study mainly provides **strategic guidance** and corresponding **SMART objectives** on:

- the scale, nature and location of retailing in Ballymun for both the convenience goods and comparison goods sectors;
- related public realm enhancements; and
- district centre management.

The purpose of this guidance is not to rigidly prescribe all the detailed measures and works considered necessary to improve retailing in the Ballymun area. Rather, its primary aim is to outline the general scope and type of improvements that could be considered for incorporation into the Local Area Plan. These are subsumed under the three key components of the Retail Study, as presented in Figure 7.1, each of which is addressed in Sections 7.1, 7.2 and 7.3 respectively.

Fig 7.1 Key Components of Retail Study



7.1 Retail guidance

Equipped with the interrelated output of the household shopper survey, the consultation process, floorspace need projections and comparative analysis with other District Centres, the retail study for Ballymun is able to advise on how much retail floorspace could be developed and where and when development should take place. As stated

above, this strategic guidance is provided separately for both the convenience goods and comparison goods sectors.

(i) Convenience goods

Scale & nature

At a minimum, Table 7.1 indicates that Ballymun is capable of accommodating 1,258 net sq m of new convenience goods floorspace up to the year 2022. This amount of sales space is equivalent in size to a supermarket. A more optimistic forecast based on regional figures would suggest a higher capacity for nearly twice this amount of floorspace, approximating to 2,115 net sq m.

Table 7.1: Retail Floorspace Projections for Ballymun 2022

Floorspace Category		Net sq.m.	Net sq.ft.
Convenience Goods	Low	1,258	13,541
	High	2,115	22,766

Cognisant of the size of competing units in the surrounding area it is recommended that this new retail floorspace be developed as large units as opposed to a number of small units. In so doing, it will allow Ballymun to compete on a like-for-like basis with similar foodstores in neighbouring areas.

Expanding the level of grocery provision in Ballymun in this way can be considered beneficial in two respects. Firstly, it will help retain a greater proportion of convenience goods expenditure within the area and thereby stem leakage to competing centres. Secondly, bearing in mind the potential for shared shopping trips, the increased attraction of Ballymun for regular food shopping can only augur well for the trade of other businesses.

Fig 7.2 Example of convenience goods shopping



Location

Foodstore development should generally take place on land zoned for Z4 mixed use in Ballymun. However, in order to best advise where future retail development should specifically take place it is necessary to appreciate the existing retail and commercial landscape in Ballymun.

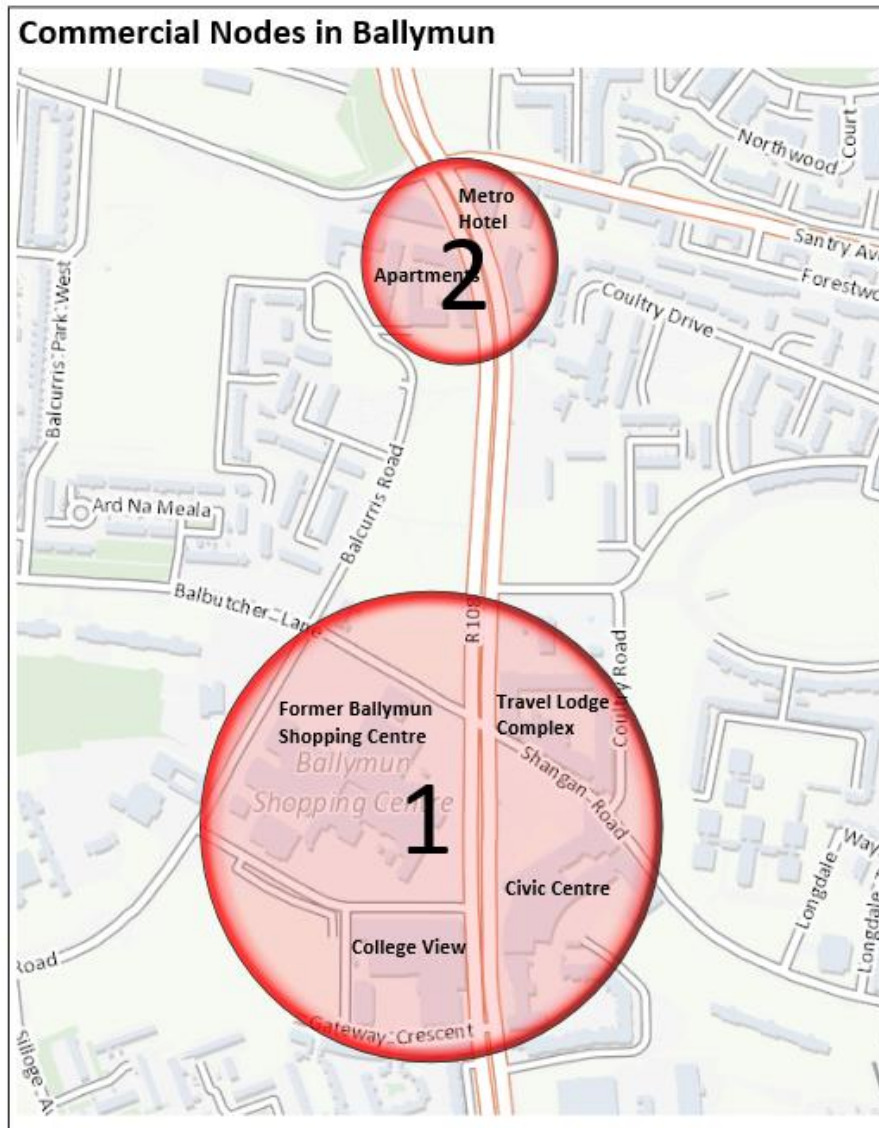
As outlined in Section 2.0 there are essentially two nodes of commercial investment in Ballymun, both of which are clustered around the intersection of the road network.

The largest node (Figure 7.3) extends from the intersection of the Shangan Road and Balbutcher Lane Lower to Gateway Crescent. It consists of four mixed use buildings including: the Travel Lodge complex, Civic Centre, College View and the former Shopping Centre. Retail use in the form of Supervalu, Centra and pharmacies occupies a

number of the ground floor units at College View, the Civic Centre and Travel Lodge complex.

The second commercial node is located on the southern side of Santry Avenue and forms part of mainly high rise residential development (known as Santry Cross) and the Metro Hotel. Compared to the large commercial node in Ballymun it accommodates limited retail use and the 2007 Ballymun Masterplan map recognises it as being equally attractive for office use.

Figure 7.3 Commercial Nodes in Ballymun



Having regard to this existing pattern of development, major convenience goods development should be first directed to the large commercial node. Development here would heighten the potential for synergy with existing retail businesses. The appropriateness of developing Z4 land for foodstore development should be assessed on the basis of sequential test criteria relating to suitability, availability and viability of land and property beyond this commercial node.

Ideally, if the land was readily available for development, the tenets of proper planning and sustainable development would dictate that the former shopping centre should be the preferred site for retail development. Comprising over 5 hectares of land, which includes land behind Supervalu, it constitutes the largest tract of Z4 serviced land available for retail development and therefore affords the greatest versatility in the layout options that can be considered. However, the requirement to undergo a compulsory purchase process to fully assemble this site means that it may not become available in the immediate future. Accordingly, given the pressing need to bolster retailing in Ballymun, as highlighted in the household survey, other development options within this Commercial

Node may need to be explored. Indeed, at the time of preparing this Study, the adjacent site north of the former shopping centre is currently in receipt of an expression of interest to provide a retail-led mixed use scheme. Its development, as well the redevelopment of the former shopping centre site, will all have to dovetail into wider public realm proposals envisaged for this Commercial Node (see Section 7.2 later).

(ii) Comparison goods

Scale and nature

The analysis of future shopping need (Table 7.2) anticipates that Ballymun is capable of accommodating at least 1,551 net sq m. of new comparison goods floorspace by the year 2022. A more optimistic projection sees this capacity double to 3,340 net sq m.

Table 7.2: Retail Floorspace Projections for Ballymun 2022

Floorspace Category		Net sq.m.	Net sq.ft.
Comparison Goods	Low	1,551	16,694
	High	3,340	35,951

Even though the translation of comparison goods floorspace figures into unit numbers is subject to the vagaries of end-user requirements, it is useful, as a frame of reference, to note that the low floorspace figure is equivalent in size to several retail warehouse units at Gulliver’s Retail Park or approximately a dozen Main Street units.

It is important to note that this comparison goods floorspace forecast is inclusive of bulky goods floorspace, which typically applies to larger units. Bulky goods retailers require bigger operational and showroom space for the large ticket items they sell. They usually trade from retail warehouses. Their floorspace requirements therefore highlight the appropriateness of providing a high floorspace need figure in this retail study.

While the assessment of future convenience goods floorspace demonstrates a capacity for another supermarket it is less clear what specific uses can be prescribed for comparison goods shopping. The results of the household shopper survey indicated the appeal of an electrical retailer in Finglas and this may represent one opportunity for a store opening in Ballymun. In an attempt to identify further uses reference can be made to what worked before in the former Ballymun Shopping Centre, as well as from observation of tenant profiles in other shopping centres and from discussions with commercial agents. In relation to the former Ballymun Shopping Centre a menswear and shoe shop apparently fared well. Other shopping centre managers indicated that discount retailers such as Dealz are best suited to Ballymun because of its low purchasing power. Commercial agents also supported this viewpoint. Indeed, experience in other district centres demonstrates that comparison goods units which sell essential durable goods and low cost items are the most resilient to competition.

It is difficult to make a case for the cultivation of specialist comparison goods shops in Ballymun given the absence of a track record of niche retailing activity at this location. Ultimately it will be the market that will decide the type of comparison goods retailers that will be attracted to Ballymun. To this end, the Retail Study has provided guidance in quantifying how much comparison goods retail space can be accommodated and in highlighting that a mix of unit sizes can be considered.

Location

New comparison goods floorspace should be developed within the large commercial node. In so doing, it would allow for the creation of a critical mass of shopping in Ballymun. It is anticipated that opportunities for large unit build will be linked to the eventual redevelopment of the former shopping centre site.

As for existing retail space, the accommodation of non-bulky comparison goods retailers in the vacant units fronting the Main Street should also continue to be facilitated. Emphasis should be placed on first securing occupation of those vacant units that front the Main Street rather than those occupying offstreet locations. It is acknowledged that the six vacant units to the rear of the Plaza Building on Coultry Road have been challenging to let. They were originally intended to function as live/work units. The best hope for their occupation related to the accommodation of relocated tenants from the shopping centre. However, this process is effectively complete and still these units remain vacant. All land use options for their occupation needs to be considered.

Phasing & employment

The twin impacts of the Ballymun shopping centre becoming obsolete and the development of competing retail stores in surrounding areas means that the facilitation of modern retail floorspace in Ballymun should be a priority. In this regard, phasing of the retail component parts is not required.

Prioritizing the development of new retail space will confer direct economic benefits vis-à-vis increased rates and employment. Experience has demonstrated that employment generation typically approximates to the creation of one retail post per 20-25 gross sq.m. of non-discount foodstore floorspace, one per 75-80 gross sq.m. of discount foodstore floorspace and one per 40 gross sq.m. of non-food retail floorspace built. In terms of estimating the employment multiplier effect of new retail development research largely relates to foodstore construction of 2,500 net sq.m. or more. It suggests that the spin-off employment rate could range between 1.3 and 2.0, in terms of the number of full time and part time jobs created indirectly in related sectors within two to three years of a new store opening.

SMART objectives relating to retailing

In the light of the above considerations a number of interrelated SMART objectives can be distilled for retail planning in Ballymun. These are listed in Table 7.3, together with the key findings that they are intended to address.

Table 7.3 Key findings and recommendations of Retail Study 2015 - Retailing

Retailing	
Key Findings	Recommendations
Low disposable income in area but potential to improve	Accommodate a range of additional retail floorspace
High expenditure leakage from Ballymun area	Encourage opening of another foodstore in Ballymun's zoned Z4 lands to help claw back expenditure leakage.
Public demand for more retail space	Facilitate opening of comparison goods shops, including bulky goods units, in association with foodstore development
Need to develop critical mass of retailing	Adopt the sequential approach to the assessment of large retail proposals by appraising the suitability, availability and viability of first developing land for retail use within and around the largest commercial node in Ballymun.
Maximise prominence of new retail development	Ensure that any large retail development affords good roadside commercial visibility and integrates with existing businesses in Ballymun, in terms of establishing good vehicular and pedestrian linkages.
Lack of Developer appeal for New Shopping Centre	Develop new retail units in a non-mall format with own-door shopfronts that are free from the operational, leasing and servicing commitments of a shopping centre.
Market for vacant units is very poor	Retain maximum flexibility in the uses considered permissible in vacant units and prioritize the occupation of those empty units on Main Street that front the R108 regional road.
Desire for more café/ restaurant space	Promote opening of complementary uses in the form of a coffee shop and/or family-friendly restaurant in any proposed retail development and/or elsewhere on Main Street.

7.2 Public realm enhancement

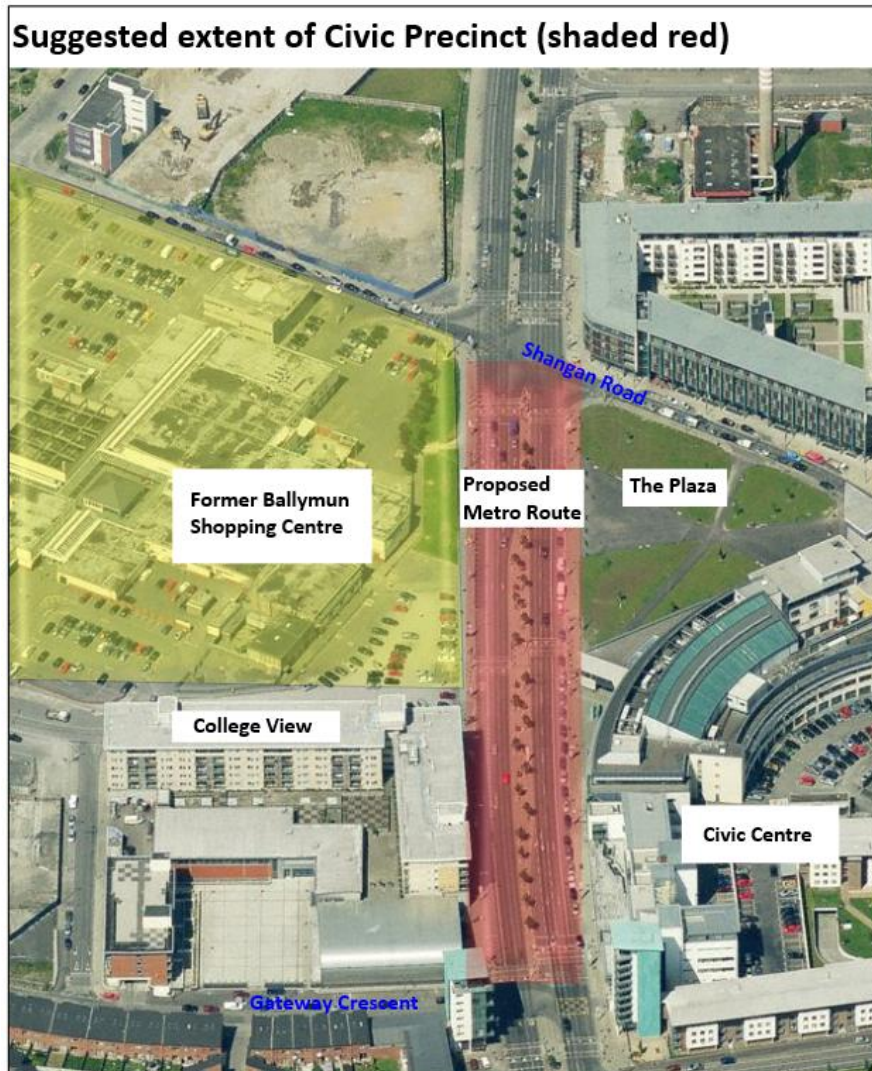
Linked with the need for the facilitation of new retail floorspace is the requirement to investigate opportunities for environmental improvements in the area. This is in part a response to the consultation feedback which criticized (despite the laudable work of the Tidy Towns organisation) the grey, bland environment of Ballymun. It is also in recognition of one of the key strands of District Centre planning, which is to physically enhance, manage and promote the District Centre as a place to live, visit and do business.

Environmental improvement can help reinforce a district centre's distinctiveness and sense of place, and thereby help restore confidence in its commercial offer. This has been successfully carried out by Aecom in other locations, including Downpatrick and Newcastle (see Figures 7.6 and 7.7 later). Environmental improvement is particularly warranted in the case of Ballymun given the demise of the shopping centre and the significant transformation in its built environment in recent times. With this in mind, it is submitted that the cornerstone of public realm enhancement in this Key District Centre should relate to the creation of a focal point for Ballymun.

Focal Point

At present, the main road through the District Centre is akin to a freeway that inhibits interaction between each side of the street. The poor connectivity is exacerbated by the existence of large open tracts of land without a street frontage. There is a need to create a focal point in Ballymun which instills a sense of place and arrival for visitors and encourages pedestrian movement from one side of the road to the other. This could take shape in the form of a Civic Precinct (Figure 7.4).

Figure 7.4



Logic would dictate that the 270m stretch of road between Shangan Road and Gateway Crescent constitutes the heart of Ballymun. It is home to the former shopping centre, Ballymun’s largest foodstore (Supervalu) and the Civic Centre, with its plaza area to the front. The Civic Centre is the civic, cultural and economic hub of the area. This status is reaffirmed by its ongoing occupation by de-tenanted businesses and services from the dilapidated shopping centre, together with its accommodation of the area’s main cultural offering, the AXIS theatre.

Fig 7.5 Ballymun Plaza in front of Civic Centre (Axis Theatre)



The designation of a civic precinct here would enable this stretch of Ballymun Main Street to become the focus of pedestrian friendly initiatives. Its designation for environmental improvement is intended to slow traffic down, alert people to off-street parking opportunities and ultimately encourage people to stop and shop. Subject to a detailed evaluation of the works and costs involved improvements could include the following:

- Demarcating the civic precinct through use of ornate lighting columns, public art, footway build outs;
- Developing a high quality public realm floorscape with hard and soft landscaping;
- Raising this stretch of carriageway and/or changing its road surface material.

Importantly, the proposed civic precinct would have to integrate with a number of other proposals and aspirations for this area, including:

- Metro North proposals for the erection of an above ground metro stop, which may be built within or adjoining this precinct;
- Aspirations to improve the usage of the spacious Plaza area in front of the Axis Theatre (Figure 7.5); and
- Medium to long term ambitions to redevelop the former shopping centre site to include a related quality built environment.

Fig 7.6 Aecom's Public Realm work in Downpatrick



Fig 7.7 Aecom's public realm work in Newcastle, Co Down



Signage

While Ballymun benefits from high accessibility and visibility from the M50 it is less clear to a visitor where the heart of this District Centre lies – hence the need to establish a focal point. Reference to the land use map in the Development Plan indicates that it stretches from Santry Avenue to the Leisure Centre at Gateway Crescent, which is a distance of over 750m. There is a need to signal to the visitor that the centre of Ballymun has been reached. With this in mind, and taking on board the aspiration to develop a focal point in Ballymun, the erection of a sizeable “Welcome to Ballymun” freestanding sign should be erected at the northern end of the proposed civic precinct. A comparable sign could also be considered for installation at the other end of the proposed precinct in front of the leisure centre.

So too, once the visitor has exited the M50 interchange there is an 800m length of roadway to be travelled before reaching Santry Cross. Along this stretch of road there is a need to alert the visitor to the presence of Ballymun and other retail venues in the area, namely IKEA and Gulliver's Retail Park. With this in mind, there is scope to erect one large shared sign, in advance of the traffic lights at IKEA, highlighting the presence of these locations. AECOM's survey of IKEA users indicated an extensive catchment (see Appendix 1) and improved signage of this type could assist in attracting some of these visitors into Ballymun.

Phasing of environmental works

It is considered that the environmental works associated with the proposed civic precinct in this retail study are not time dependent on first securing redevelopment of the former shopping centre site. This is because approximately 100m of the designation applies to a length of carriageway that is already developed on each side, i.e. from Supervalu to the Leisure Centre, and this could constitute phase 1 of the works.

It is envisaged that the environmental works on the site of the former shopping centre will form part and parcel of the redevelopment of the site. Ideally these should be provided by the private sector via planning conditions and contractual agreements with the Council related to a planning permission. However, in the absence of this happening, publicly funded interim landscaping measures may also have to be considered, possibly in conjunction with proposals to maximise the functionality of the Plaza space.

In addition, despite the lack of precise details on the location of the proposed Metro Stop in Ballymun, it is assumed that the proposed environmental works for the proposed Civic Precinct can take place without prejudice to the installation of the Stop. It is nonetheless recognised that the scope and nature of the environmental works may have to be modified to accord with the exact location of the Metro Stop.

SMART objectives relating to public realm enhancement

As in the case of retailing, a number of objectives for the public realm in Ballymun can be proposed in response to the key findings of the Study. These are outlined in Table 7.4.

Table 7.4: Key findings and recommendations of Retail Study 2015 – Public Realm

Public Realm Enhancement	
Key Findings	Recommendations
Need for a focal point	Designate the area on Main Street between Shangan Road & Gateway Crescent as a Civic Precinct, which would act as a focal point for Ballymun. Create a distinctive sense of place and identity at the Civic Precinct via streetscape enhancements (e.g. paving, lighting, public art) As a complement to the above proposal create a quality built environment on the site of the former shopping centre, capable of instilling a sense of arrival and encouraging people to stop and shop.
Scope to improve signage	Introduce "Welcome to Ballymun" signage in the proposed Civic Precinct In conjunction with Fingal County Council introduce one large shared sign between M50 Interchange & Santry Crossroads highlighting the presence of IKEA, Ballymun and Gulliver's Retail Park.
Address negative appearance of the area	Resources permitting, install virtual shopfronts on vacant roadside premises on the Main Street as an interim counterweight to their negative visual impact.

7.3 District Centre Management

Management of this District Centre already benefits from the decentralized presence of Dublin City Council offices in the Civic Centre. It is perfectly placed to assist in the employment of "soft measures" for the advancement of retailing in Ballymun. This may relate to incentives, initiatives and marketing strategies.

Incentives

DCC already offers short term leasing agreements and start-up concessionary rates to assist in the occupation of vacant units in Z4 zoned lands in Ballymun District Centre. Discussions with the other shopping centre managers reveal that maximum flexibility in terms is applied to secure the occupation of vacant units. Rent free periods are offered by shopping centres and these extend from 1 month to 5 years depending on the requirements of the tenant. In recent times, leasehold agreements involving capped rents plus a proportion of the turnover have become popular with fashion and food retailers. This involves a payment of a base rent, with a percentage of turnover added once a certain threshold is exceeded. In order for the latter arrangement to work annual accounts have to be submitted by the lessee for verification. In theory, the adoption of turnover based leasehold agreements could be considered by the Council as a means of attracting tenants to the vacant units. However, in practice, it is labour intensive work and the resources are not available at this time to countenance such an option. This

notwithstanding further consideration should be given to the range of rental incentives offered by the Council.

Initiatives

A farmer’s market successfully operated in Ballymun Shopping Centre in recent times and, assuming a suitable venue can be provided, presumably it can do so again. Other District Centres typically reserve a portion of a large car park on a selected day of the week for market use. The largest off-street car park in Ballymun is the one linked to the former shopping centre. Accordingly, it is suggested that consideration should be given to the incorporation of a weekly farmer’s market into any redevelopment proposals for the former shopping centre site.

Marketing

Ballymun is quite unique in having two hotels as part of its mixed use profile. Accordingly, in order to generate footfall levels in Ballymun, opportunities for joint promotional strategies should be thoroughly investigated to persuade people to undertake short stay package trips in the area linked to various events (e.g. Halloween fireworks display) and arts and music festivals. With this in mind, the Axis Theatre, which includes dance studios and music and recording studios, has a wide appeal as well as being an outlet for local talent.

The prospects for fostering joint marketing initiatives aimed at tapping into the GDA numbers frequenting IKEA would appear slim. IKEA is a self-reliant, distinctive brand, whose store in Ballymun commands a position of high visibility off the M50. Its promotional initiatives choose to centre on charity and recycling work, as opposed to cooperation with other retailers.

In terms of marketing it is noteworthy that the draft Ballymun Economic Plan 2015 intends to create a website to support local businesses, as per one of its strategic goals to establish the physical support infrastructure in the area. As part of its development this Retail Study recommends that a separate webpage within this website be dedicated to highlighting the retail development opportunities in Ballymun, This would build upon the findings of this study and focus on the attractions for retail investment. These include: the immediate availability of publicly assembled land for development, the available catchment expenditure, the high accessibility of the area, the surveyed desire for more shopping space, the local presence of Council offices to provide assistance, etc.

SMART objectives relating to District Centre Management

Having regard to the foregoing a number of objectives can be formulated for the management of the District Centre. These are outlined in Table 7.5.

Table 7.5: Key findings and recommendations of Retail Study 2015 – District Centre Management

District Centre Management	
Key Findings	Recommendations
Shopping Centres employ a range of rental options to secure occupancy of vacant units	Further investigate the range of rental options for the occupation of vacant units in Ballymun
Farmer’s market in Ballymun was a success before	Consider the feasibility of incorporating a weekly farmer’s market into any redevelopment proposals for the former shopping centre site.
Need to maximize joint potential of hotel & civic space in attracting people into the area	Explore in detail opportunities for joint promotional strategies to encourage people to undertake short stay package trips in the area linked to various events.
Requirement to highlight retail opportunities in Ballymun	Create webpage as part of website earmarked for local businesses

7.4 Planning & development considerations

Retail challenges & outlook

Discussions with shopping centre managers indicated that current challenges for retailers relate to payment of rents, rates and service charges. Challenges in the future are likely to relate to competition from bigger centres and growth in online shopping. As outlined in Section 5.5 of the Retail Study internet shopping is forecast to continue to grow in the coming years. Nonetheless, for the foreseeable future, the majority of retail sales are still expected to take place from shops.

Land use flexibility

The Z4 zoning of District Centre lands effectively confers town centre status on this location, wherein a wide range of uses can be considered for development. The Council has added to this land use flexibility by removing certain development restrictions, for example the removal of the office size cap that applies to other parts of Dublin City. The non-statutory 2007 Masterplan map for the area has further elaborated upon this “town centre” mixed use zoning by indicating the suitability of particular uses at selected locations. For example, office use is indicated for Santry Cross and this area now has two solicitor’s offices.

Examination of the lists of uses that are “permissible” and “open to consideration” in the Dublin City Development Plan 2011-2017 indicates that the Council has demonstrated maximum flexibility in the uses allowed in this District Centre. This approach needs to continue in order to encourage occupation of remaining vacant units.

Complementary uses

The identification of specific non-retail uses that could be attracted to Ballymun was also a requirement of the Retail Study. The household survey revealed a demand for a coffee house/café and family friendly restaurant (20% of respondents), as well as a public house (8%). The B4B workshop specifically suggested that a new restaurant could feature as a

Fig 7.8 Café/Restaurant example



high rise unit in the existing Metro hotel. It is anticipated that the best prospects for investment in these complementary uses is linked to a prior increase in footfall levels secured by retail development.

The household survey also recorded a desire for a cinema (24% of respondents). However, the recent opening of the Odeon Cineplex at Charlestown in October 2015 means that there may not be market capacity for this now. This market limitation equally applies to the prospects for a bowling alley in Ballymun, a leisure use which is also due to open at Charlestown in early 2016.

The draft Dublin Development Plan 2016-2022 seeks to promote Ballymun as a leading arts and cultural hub serving the city and wider region (p130). Uses associated with this vision may offer additional opportunities for complementary development in the future.

Car parking

From a quantitative perspective there is adequate parking provision available in Ballymun. This viewpoint is corroborated by the finding that Clearwater Retail Park has nearly the same number of parking spaces as Ballymun (560 versus 450) yet has three times the level of retail floorspace. However, there are issues relating to the long term injudicious use of the most convenient spaces in Ballymun, as well as limited onstreet availability due to the strategic traffic function of the R108 regional road. Greater regulation, improved signage and formalization of parking areas will all feature in a future parking strategy for Ballymun.

Layout and design

As a facilitator of retail development in Ballymun it is imperative that the Council's design guidance for a given site offers sufficient flexibility to encourage submissions by developers and end-users alike.

In contrast to the layout of the former shopping centre, which was orientated away from the road, new retail development in Ballymun should be carefully designed to maximize its prominence on the R108 and to harmonize with the existing plaza area opposite. It should command high visibility with its frontage directly or partially facing the roadside. It should be conveniently linked to surrounding businesses and this may require detailed consideration of shared access arrangements, pedestrian crossing points, etc.

It is acknowledged that DCC encourages high density development on Z4 lands. However, there is a need to recognize that retail end-users generally prefer to operate from freestanding, single storey outlets. They are primarily interested in occupying a building for a single use as opposed to one with other uses above. Accordingly, in order to maximize retail investment opportunities, it may be prudent to consider a mix of building heights within a proposed scheme. Understandably, this implies that only a large site will allow this to take place.

7.5 Implementation

Nothing in this document should be read as a commitment that public resources will be provided for any specific proposal. All proposals would have to be subject to economic appraisal and the overall availability of public funding.

7.6 Conclusion

All of the key findings and objectives in this Retail Study pertaining to retailing, the public realm and management of the District Centre are summarised in the preceding tables 7.3, 7.4 and 7.5.

Clearly, there is ample scope to develop retail space in Ballymun given the excessive level of expenditure leakage from its catchment. Equally, there is potential to develop this retail space in conjunction with redevelopment proposals and environmental initiatives in the area.

While it is recognised that market realities and business viability models will ultimately determine how much retail floorspace will be built in Ballymun in the coming years this Retail Study is intended to assist the Council and the community in planning for such development up to the year 2022.

Appendices:

- **Appendix 1 Surveyed County Address of IKEA Shoppers**
- **Appendix 2 Copy of Questionnaire**
- **Appendix 3 Household Shopper Survey Results for Ballymun**
- **Appendix 4 Retail Expenditure Guide 2014-2015**
- **Appendix 5a Report of Consultations**
- **Appendix 5b B4B Meeting Note**

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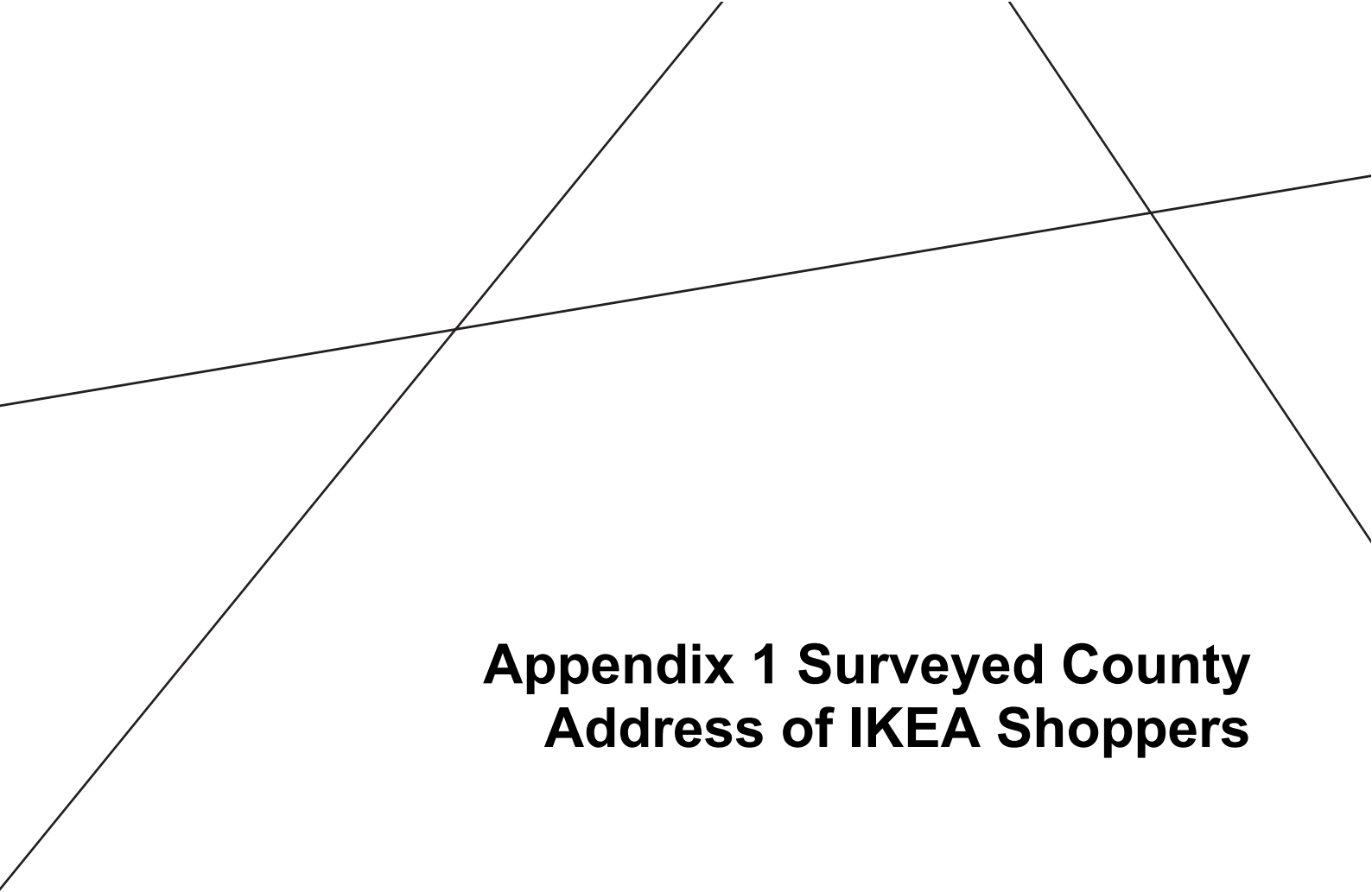
Ballymun Retail Study 2016 Final Report

Prepared on behalf of Dublin City Council



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**Appendix 1 Surveyed County
Address of IKEA Shoppers**

01

Appendix 1 County address of IKEA shoppers

County address of visitors to IKEA	
County	Percentage of visitors
Dublin	55.1%
Kildare	6.5%
Cork	4.3%
Galway	4.0%
Wicklow	4.0%
Meath	3.8%
Tipperary	3.2%
Louth	2.7%
Kerry	1.9%
Laois	1.9%
Mayo	1.6%
Offaly	1.6%
Cavan	1.3%
Kilkenny	1.1%
Limerick	1.1%
Waterford	0.8%
Wexford	0.8%
Roscommon	0.5%
Westmeath	0.5%
Carlow	0.3%
Donegal	0.3%
Leitrim	0.3%
Monaghan	0.3%
NI	1.1%
England	0.8%
EU	0.3%
Total	100%

Source: Aecom hourly surveys over two days in November 2015



Appendix 2 Copy of Questionnaire

02

Ballymun Household Survey

Good morning/afternoon/evening. My name is ... from Strategic Marketing, an independent research agency working on behalf of Dublin City Council. We are conducting a short survey of residents in the Ballymun area about shopping habits. Could you spare me a few minutes to answer some quick questions?

The survey will take no longer than 10 minutes and by participating you will be placed in the prize draw with other people who have taken part in the survey with a chance to win a single prize of 400 euros. The lucky winner will be contacted by phone and the winning name will be published on the Council's Facebook page.

May I speak to the person who does most of your household shopping?

Q1a **As we need to speak to people within and around Ballymun, could you confirm <repeat address from database> is your current address?**

- Yes, correct No

Q1b **If no, what is your full address so that we can check which area you fall into?**

Interviewers - please check the address list and code respondent's address into the following catchment area

- | | |
|----------------------------------|---|
| <input type="radio"/> Ballymun A | <input type="radio"/> Ballygal C |
| <input type="radio"/> Ballymun B | <input type="radio"/> Whitehall A |
| <input type="radio"/> Ballymun C | <input type="radio"/> Whitehall B |
| <input type="radio"/> Ballymun D | <input type="radio"/> Airport |
| <input type="radio"/> Ballymun E | <input type="radio"/> None of the above - thank and close interview |
| <input type="radio"/> Ballymun F | |

Respondent's actual full address

CONVENIENCE GOODS SHOPPING

Convenience goods are generally grocery items and everyday consumables that you buy regularly and locally

Q2 To start with, can I ask which store you visit to do most of your MAIN FOOD/grocery shopping?

(Tick only one & only tick several if the respondent states that a number of stores are equally visited)

- Aldi, St Margaret's Road, Finglas
- Aldi, Santry Avenue
- Dunnes, Charlestown Shopping Centre, Finglas
- Dunnes, Northside Shopping Centre, Coolock
- Dunnes, Blanchardstown Shopping Centre
- Dunnes, Pavilions Shopping Centre, Swords
- Iceland, Finglas Village Centre
- Lidl, North Road, Finglas
- Lidl, Omni Park Shopping Centre, Santry
- M&S, Blanchardstown Shopping Centre
- Supervalu, Main Street, Ballymun
- Supervalu, Finglas
- Supervalu, Northside Shopping Centre, Coolock
- Supervalu, Pavilions Shopping Centre, Swords
- Tesco, Omni Park Shopping Centre, Santry
- Tesco Extra, Clearwater Shopping Centre, Finglas
- Tesco, Phibsboro Shopping Centre, Phibsborough, Dublin
- Other

Other (please specify below)

Q3 How do you normally travel to shop for your food/groceries?

(If more than one mode of transport record the one for the longest part of journey)

- | | |
|----------------------------|-----------------------------|
| <input type="radio"/> Car | <input type="radio"/> Train |
| <input type="radio"/> Walk | <input type="radio"/> Cycle |
| <input type="radio"/> Bus | <input type="radio"/> Other |
| <input type="radio"/> Taxi | |

Other (please specify below)

Q4 How long does the journey take?

- | | |
|---------------------------------------|---------------------------------------|
| <input type="radio"/> 0 - 5 minutes | <input type="radio"/> 31 - 45 minutes |
| <input type="radio"/> 6 - 10 minutes | <input type="radio"/> 46 - 60 minutes |
| <input type="radio"/> 11 - 15 minutes | <input type="radio"/> An hour or more |
| <input type="radio"/> 16 - 20 minutes | <input type="radio"/> Don't know |
| <input type="radio"/> 21 - 30 minutes | |

Q5 Why do you choose to shop at {Q2} for these goods?

(Do not read out - tick all that apply)

- | | |
|--|---|
| <input type="checkbox"/> Convenient / close to home | <input type="checkbox"/> Preference to shop at a particular store |
| <input type="checkbox"/> Convenient / close to work | <input type="checkbox"/> Near to other shops so can shop around |
| <input type="checkbox"/> Free parking | <input type="checkbox"/> Habit, have always used the store |
| <input type="checkbox"/> On the bus route | <input type="checkbox"/> Offers and discounts (including Loyalty schemes) |
| <input type="checkbox"/> Wide range of goods available | <input type="checkbox"/> Don't know |
| <input type="checkbox"/> Reasonable prices | <input type="checkbox"/> Other |

Other (please specify below)

Q6 When you carry out your main food/grocery shopping do you usually visit other shops or businesses in the area as part of that same trip? If so, which type of premises do you visit?

(Tick all that apply)

- None - don't visit other shops or businesses
- Other food / grocery shops e.g. butcher, bakery, etc
- Other non food shops e.g. clothes shops, electrical stores, furniture shops, post office, chemist, hairdressers, beauty salon, etc
- Eateries e.g. cafe, restaurant, coffee shop, etc
- Services e.g. Banks, Solicitors, Insurance, etc
- Leisure facilities e.g. gym, swimming pool, etc
- Entertainment facilities e.g. cinema, bowling, etc
- Cultural facilities e.g. theatre, museums, etc
- Licensed premises e.g. pub, betting office, bingo, etc
- Other

Other (please specify below)

Q7 **On average how much do you spend on food/groceries each week?**

- | | |
|-------------------------------------|---|
| <input type="radio"/> Less than €20 | <input type="radio"/> €161-180 |
| <input type="radio"/> €21-40 | <input type="radio"/> €181-200 |
| <input type="radio"/> €41-60 | <input type="radio"/> €201-220 |
| <input type="radio"/> €61-80 | <input type="radio"/> €221-240 |
| <input type="radio"/> €81-100 | <input type="radio"/> Don't know |
| <input type="radio"/> €101-120 | <input type="radio"/> Other |
| <input type="radio"/> €121-140 | <input type="radio"/> Prefer not to say |
| <input type="radio"/> €141-160 | |

Other (please specify below)

Q8 **If you shop online can I ask what percentage of your total food shopping is carried out on the internet, roughly speaking?**

- | | |
|--|---|
| <input type="radio"/> None - don't shop online | <input type="radio"/> 61-70% |
| <input type="radio"/> 0-10% | <input type="radio"/> 71-80% |
| <input type="radio"/> 11-20% | <input type="radio"/> 81-90% |
| <input type="radio"/> 21-30% | <input type="radio"/> 91-100% |
| <input type="radio"/> 31-40% | <input type="radio"/> Don't know |
| <input type="radio"/> 41-50% | <input type="radio"/> Prefer not to say |
| <input type="radio"/> 51-60% | |

Q9 Outside of your main food/grocery trip where do you go for small, day-to-day TOP-UP food shopping (e.g. buying a pint of milk, newspaper, or loaf of bread)?

(Tick all that apply)

- Ausra store, Gateway Building, Ballymun
- Centra, Civic Centre, Ballymun
- Centra, Coultry (Neighbourhood Centre)
- Centra, Hampton Wood
- Centra - Quinn's, Poppintree Parade (Neighbourhood Centre)
- Centra, St Pappin's Road
- Esso Garage, Ballymun Road
- Eurospar, 131 Ballymun Road
- Eurospar, Century Business Park, Meakstown
- Eurospar, Gulliver's Retail Park, Northwood
- Gala, Willow Park
- Late shop, Shanard Road
- Mace, Glasnevin Avenue
- Quinn's Daybreak, Silloge Road (Neighbourhood Centre)
- Spar, Dublin City University
- Spar, Glasnevin Avenue
- Tesco Express, Glasnevin Avenue
- Topaz Garage, Ballymun
- Other

Other (please specify below)

COMPARISON GOODS SHOPPING (NON-FOOD SHOPPING)

Comparison goods are durable goods such as clothes, footwear, jewellery, etc. that you shop around for in order to compare price and quality

Q10 Can you please tell me the location where you choose to do most of your shopping for items like clothes, shoes and other fashion items like jewellery, handbags, etc?

(Tick one only & only tick several if the respondents states that a number of locations are equally visited)

- Blanchardstown Shopping Centre
- Charlestown Shopping Centre, Meakstown
- Dublin City Centre
- Dundrum Town Centre, South Dublin
- Gulliver's Retail Park, Northwood
- Liffey Valley Shopping Centre
- Northside Shopping Centre, Coolock
- OMNI Retail Park, Santry
- Pavilions Shopping Centre, Swords
- Tesco Extra, Clearwater, Finglas
- Online / internet
- Don't know
- Other

Other (please specify below)

Q11 How do you normally travel to that centre / these centres?

(If more than one mode of transport record the one for the longest part of journey)

- Car
- Walk
- Bus
- Taxi
- Train
- Cycle
- Shop online only
- Other

Other (please specify below)

Q12 How long does the journey take?

- 0 - 5 minutes
- 6 - 10 minutes
- 11 - 15 minutes
- 16 - 20 minutes
- 21 - 30 minutes
- 31 - 45 minutes
- 46 - 60 minutes
- An hour or more
- Don't know
- Shop online only

Q13 Why do you choose to shop at that centre/these centres?

(Do not read out - tick all that apply)

- | | |
|--|---|
| <input type="checkbox"/> Convenient / close to home | <input type="checkbox"/> Preference to shop at a particular store |
| <input type="checkbox"/> Convenient / close to work | <input type="checkbox"/> Near to other shops so can shop around |
| <input type="checkbox"/> Free parking | <input type="checkbox"/> Habit, have always used the store |
| <input type="checkbox"/> On the bus route | <input type="checkbox"/> Don't know |
| <input type="checkbox"/> Wide range of goods available | <input type="checkbox"/> Other |
| <input type="checkbox"/> Reasonable prices | |

Other (please specify below)

Q14 Do you visit other shops, businesses, or places of leisure or entertainment when you shop for these goods? If so, which type of premises do you visit?

(Tick all that apply)

- No - don't visit other shops, businesses or places of leisure or entertainment
- Food / grocery shops e.g. supermarket, butcher, bakery, etc
- Other non-food shops e.g. electrical stores, furniture shops, post office, chemist, hairdressers, etc
- Eateries e.g. Cafe, restaurant, coffee shop, etc
- Services e.g. Banks, Solicitors, Insurance, etc
- Entertainment facilities e.g. cinema, bowling, etc
- Cultural facilities e.g. theatre, museums, etc
- Leisure facilities e.g. Gym, swimming pool, etc
- Licensed premises e.g. pub, betting office, bingo, etc
- Other

Other (please specify below)

Q15 If you shop on the Internet for clothes and footwear and other fashion items can I ask what percentage of your total expenditure on these items is carried out online - approximately?

- | | |
|---|---|
| <input type="radio"/> None - don't shop online for these types of goods | <input type="radio"/> 51-60% |
| <input type="radio"/> 0-10% | <input type="radio"/> 61-70% |
| <input type="radio"/> 11-20% | <input type="radio"/> 71-80% |
| <input type="radio"/> 21-30% | <input type="radio"/> 81-90% |
| <input type="radio"/> 31-40% | <input type="radio"/> 91-100% |
| <input type="radio"/> 41-50% | <input type="radio"/> Don't know |
| | <input type="radio"/> Prefer not to say |

BULKY DURABLE GOODS SHOPPING (NON-FOOD SHOPPING)

Bulky goods are large durable goods such as big electrical items (e.g. fridges, washing machines, TVs, etc.) and furniture (sofas, beds) that you shop less often for and which you generally rely on being delivered to the home

Q16 Can I ask where you do most of your shopping for large bulky items like electrical goods (e.g. fridges, washing machines) and furniture (e.g. Sofas, beds, wardrobes)?

(Tick only one and only tick several if the respondent states that a number of locations are equally visited)

- Airside Retail Park, Swords
- Blanchardstown Shopping Centre
- Charlestown Shopping Centre, Meakstown
- Clearwater, Finglas
- Dublin City Centre
- Gulliver's Retail Park, Northwood
- IKEA
- Liffey Valley Shopping Centre / Retail Park
- OMNI Park, Santry
- Northside Shopping Centre, Coolock
- Pavilions Shopping Centre, Swords
- Online / internet
- Don't know
- Other

Other (please specify below)

VIEWS ON STATE OF EXISTING SHOPPING AND FUTURE PROSPECTS

Q17 Have you visited or do you visit the Ballymun area for shopping? If so, how satisfied are you with shopping facilities available in Ballymun?

- | | |
|--|---|
| <input type="radio"/> No - don't go to Ballymun for shopping | <input type="radio"/> Dissatisfied |
| <input type="radio"/> Very satisfied | <input type="radio"/> Very dissatisfied |
| <input type="radio"/> Satisfied | <input type="radio"/> Don't know |
| <input type="radio"/> Neither satisfied nor dissatisfied | |

Q18 If dissatisfied or very dissatisfied with shopping in Ballymun can you explain why this is the case?

(Do not read out - tick all that apply)

- | | |
|---|--|
| <input type="checkbox"/> Limited range of supermarkets available | <input type="checkbox"/> Lack of parking |
| <input type="checkbox"/> Limited range of fashion shops available | <input type="checkbox"/> Too far to get to |
| <input type="checkbox"/> Poor quality of shopping environment | <input type="checkbox"/> Don't know |
| <input type="checkbox"/> Expensive | <input type="checkbox"/> Nothing in particular |
| <input type="checkbox"/> Don't feel safe | <input type="checkbox"/> Other |
| <input type="checkbox"/> General negative feeling about the area | |

Other (please specify below)

Q19 In terms of shopping, is there anything you would like to see improved in Ballymun in order to encourage you to shop in the area?

(Do not read out - tick all that apply)

- | | |
|---|---|
| <input type="checkbox"/> Better choice of supermarkets | <input type="checkbox"/> Better bus services |
| <input type="checkbox"/> Better choice of fashion shops | <input type="checkbox"/> Would never shop at Ballymun |
| <input type="checkbox"/> Cheaper prices | <input type="checkbox"/> Don't know |
| <input type="checkbox"/> Greater security | <input type="checkbox"/> Nothing |
| <input type="checkbox"/> More parking spaces | <input type="checkbox"/> Other |

Other (please specify below)

Q20 Apart from shopping, is there anything you would like to see introduced to Ballymun in order to make it a more attractive place to visit?

(Do not read out - tick all that apply)

- More places to eat e.g. restaurants, cafes, coffee houses
- More community/cultural events e.g. dances, theatre shows, festivals, etc.
- More places of entertainment e.g. cinema, bowling, bingo club
- More leisure/recreational facilities e.g. 3G pitches, private gym
- More social facilities e.g. bars, betting offices, nightclubs
- Environmental improvements such as paving, landscaping, lighting, seating (please specify below)
- Traffic calming measures such as speed ramps, traffic islands, traffic lights (please specify below)
- Improved signposting
- Other

Probe for more information about "More places to eat"

Probe for more information about "More community/cultural events"

Probe for more information about "More places of entertainment"

Probe for more information about "More leisure/recreational facilities"

Probe for more information about "More social facilities"

Probe for more information about "Environmental improvements"

Probe for more information about "Traffic calming measures"

Other (please specify below)

Q21 **Do you visit Ballymun Main Street in the evenings after 6pm? If so, what is the purpose of your visit?**

(Tick all that apply)

- Don't visit in the evening
- To shop
- To eat out
- To work (business)
- Leisure/recreational purposes e.g. gym, playing sports, walking
- Entertainment purposes e.g. cinema, bingo
- Going to licensed premises e.g. going to public house, betting office
- Social purposes e.g. visiting friends or relatives
- Cultural purposes e.g. going to theatre
- Community purposes e.g. attending a community meeting or event
- Educational purposes e.g. attending evening classes, parents night
- Other

Other (please specify below)

DEMOGRAPHICS

Q22 **Finally, can I ask which age group you belong to?**

- Under 20
- 20-29
- 30-39
- 40-49
- 50-65
- Over 65

Q23 **Gender** (record by observation only)

- Male
- Female

Thank you very much for taking part in this survey

I would like to assure you that all the responses you have given are totally confidential and that this interview has been carried out under the guidance of the Market Research Society.

You have been speaking to <name of interviewer> from Strategic Marketing.

If you wish to verify that this is genuine telephone survey you can do so by phoning Strategic Marketing on 02920 303 100 or the Market Research Society on 0500 39 69 99

Interviewer Declaration: I declare that this interview was conducted in accordance with your instructions and within the code of conduct of the Market Research Society.

PLEASE COMPLETE THE FOLLOWING:

Interviewer's full name



**Appendix 3 Household Shopper Survey
Results for Ballymun**

03

Q2. To start with, can I ask which store you visit to do most of your MAIN FOOD/grocery shopping? by Catchment area

Counts Break % Respondents	Total	Catchment area									
		Ballymun A	Ballymun B	Ballymun C	Ballymun D	Ballymun E	Ballymun F	Ballygal C	Whitehall A	Whitehall B	Airport
Base	400	53	62	88	38	25	37	33	22	29	13
Q2											
Aldi, St Margaret's Road, Finglas	32 8%	15 28%	3 5%	1 1%	- -	5 20%	6 16%	2 6%	- -	- -	- -
Aldi, Santry Avenue	122 31%	12 23%	25 40%	45 51%	13 34%	2 8%	- -	7 21%	2 9%	10 34%	6 46%
Dunnes, Charlestown Shopping Centre, Finglas	75 19%	14 26%	15 24%	6 7%	6 16%	7 28%	18 49%	3 9%	4 18%	2 7%	- -
Dunnes, Northside Shopping Centre, Coolock	6 2%	- -	2 3%	3 3%	- -	- -	- -	- -	1 5%	- -	- -
Dunnes, Blanchardstown Shopping Centre	5 1%	- -	1 2%	1 1%	1 3%	- -	- -	1 3%	1 5%	- -	- -
Dunnes, Pavilions Shopping Centre, Swords	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
Iceland, Finglas Village Centre	2 1%	- -	1 2%	- -	- -	- -	1 3%	- -	- -	- -	- -
Lidl, North Road, Finglas	23 6%	7 13%	1 2%	1 1%	1 3%	5 20%	6 16%	1 3%	1 5%	- -	- -
Lidl, Omni Park Shopping Centre, Santry	21 5%	- -	1 2%	7 8%	- -	2 8%	- -	2 6%	5 23%	1 3%	3 23%
M&S, Blanchardstown Shopping Centre	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
Supervalu, Main Street, Ballymun	40 10%	3 6%	16 26%	5 6%	14 37%	2 8%	- -	- -	- -	- -	- -
Supervalu, Finglas	19 5%	4 8%	- -	- -	- -	3 12%	9 24%	2 6%	1 5%	- -	- -
Supervalu, Northside Shopping Centre, Coolock	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -

Q2. To start with, can I ask which store you visit to do most of your MAIN FOOD/grocery shopping? by Catchment area

Counts Break % Respondents	Total	Catchment area									
		Ballymun A	Ballymun B	Ballymun C	Ballymun D	Ballymun E	Ballymun F	Ballygal C	Whitehall A	Whitehall B	Airport
Base	400	53	62	88	38	25	37	33	22	29	13
Supervalu, Pavilions Shopping Centre, Swords	3 1%	-	1 2%	1 1%	-	-	-	-	-	1 3%	-
Tesco, Omni Park Shopping Centre, Santry	47 12%	2 4%	1 2%	19 22%	6 16%	1 4%	-	1 3%	6 27%	7 24%	4 31%
Tesco Extra, Clearwater Shopping Centre, Finglas	32 8%	4 8%	3 5%	2 2%	-	4 16%	9 24%	6 18%	3 14%	-	1 8%
Tesco, Phibsboro Shopping Centre, Phibsborough, Dublin	-	-	-	-	-	-	-	-	-	-	-
Other	33 8%	-	3 5%	4 5%	1 3%	1 4%	2 5%	9 27%	3 14%	10 34%	-

Q3. How do you normally travel to shop for your food/groceries? by Catchment area

Counts Break % Respondents	Total	Catchment area									
		Ballymun A	Ballymun B	Ballymun C	Ballymun D	Ballymun E	Ballymun F	Ballygal C	Whitehall A	Whitehall B	Airport
Base	400	53	62	88	38	25	37	33	22	29	13
Q3											
Car	263 66%	33 62%	37 60%	52 59%	16 42%	21 84%	31 84%	24 73%	20 91%	21 72%	8 62%
Walk	95 24%	10 19%	18 29%	34 39%	15 39%	2 8%	5 14%	4 12%	1 5%	2 7%	4 31%
Bus	29 7%	7 13%	5 8%	2 2%	6 16%	2 8%	1 3%	2 6%	-	4 14%	-
Taxi	3 1%	1 2%	1 2%	-	-	-	-	-	-	-	1 8%
Train	-	-	-	-	-	-	-	-	-	-	-
Cycle	3 1%	2 4%	-	-	-	-	-	1 3%	-	-	-
Other	7 2%	-	1 2%	-	1 3%	-	-	2 6%	1 5%	2 7%	-

Q4. How long does the journey take? by Catchment area

Counts Break % Respondents	Total	Catchment area									
		Ballymun A	Ballymun B	Ballymun C	Ballymun D	Ballymun E	Ballymun F	Ballygal C	Whitehall A	Whitehall B	Airport
Base	400	53	62	88	38	25	37	33	22	29	13
Q4											
0 - 5 minutes	118 30%	13 25%	17 27%	35 40%	12 32%	8 32%	10 27%	5 15%	3 14%	9 31%	6 46%
6 - 10 minutes	154 39%	20 38%	20 32%	29 33%	14 37%	13 52%	22 59%	12 36%	8 36%	10 34%	6 46%
11 - 15 minutes	59 15%	6 11%	11 18%	8 9%	4 11%	2 8%	4 11%	11 33%	9 41%	4 14%	- -
16 - 20 minutes	34 9%	5 9%	6 10%	11 13%	2 5%	1 4%	1 3%	3 9%	1 5%	3 10%	1 8%
21 - 30 minutes	23 6%	7 13%	6 10%	4 5%	5 13%	- -	- -	- -	- -	1 3%	- -
31 - 45 minutes	1 0%	- -	- -	- -	1 3%	- -	- -	- -	- -	- -	- -
46 - 60 minutes	2 1%	1 2%	- -	- -	- -	1 4%	- -	- -	- -	- -	- -
An hour or more	2 1%	1 2%	1 2%	- -	- -	- -	- -	- -	- -	- -	- -
Don't know	7 2%	- -	1 2%	1 1%	- -	- -	- -	2 6%	1 5%	2 7%	- -

Q5. Why do you choose to shop at Q2 for these goods? by Catchment area

Counts Break % Respondents	Total	Catchment area									
		Ballymun A	Ballymun B	Ballymun C	Ballymun D	Ballymun E	Ballymun F	Ballygal C	Whitehall A	Whitehall B	Airport
Base	400	53	62	88	38	25	37	33	22	29	13
Q5											
Convenient / close to home	211 53%	30 57%	33 53%	52 59%	19 50%	9 36%	13 35%	16 48%	17 77%	12 41%	10 77%
Convenient / close to work	2 1%	- -	2 3%	- -	- -	- -	- -	- -	- -	- -	- -
Free parking	17 4%	- -	2 3%	3 3%	- -	3 12%	1 3%	3 9%	4 18%	1 3%	- -
On the bus route	3 1%	2 4%	- -	- -	- -	- -	- -	1 3%	- -	- -	- -
Wide range of goods available	63 16%	13 25%	7 11%	7 8%	3 8%	8 32%	12 32%	5 15%	5 23%	1 3%	2 15%
Reasonable prices	133 33%	20 38%	21 34%	33 38%	11 29%	10 40%	9 24%	10 30%	4 18%	10 34%	5 38%
Preference to shop at a particular store	32 8%	3 6%	- -	5 6%	2 5%	5 20%	5 14%	5 15%	1 5%	4 14%	2 15%
Near to other shops so can shop around	8 2%	2 4%	1 2%	1 1%	- -	1 4%	2 5%	- -	- -	- -	1 8%
Habit, have always used the store	29 7%	5 9%	- -	3 3%	3 8%	2 8%	6 16%	2 6%	4 18%	4 14%	- -
Offers and discounts (including Loyalty schemes)	6 2%	2 4%	1 2%	- -	- -	1 4%	2 5%	- -	- -	- -	- -
Don't know	1 0%	- -	- -	1 1%	- -	- -	- -	- -	- -	- -	- -
Other	59 15%	5 9%	11 18%	13 15%	14 37%	5 20%	3 8%	2 6%	3 14%	3 10%	- -

Q6. When you carry out your main food/grocery shopping do you usually visit other shops or businesses in the area as part of that same trip? If so, which type of premises do you visit? by Catchment area

Counts Break % Respondents	Total	Catchment area									
		Ballymun A	Ballymun B	Ballymun C	Ballymun D	Ballymun E	Ballymun F	Ballygal C	Whitehall A	Whitehall B	Airport
Base	400	53	62	88	38	25	37	33	22	29	13
Q6											
None - don't visit other shops or businesses	203 51%	29 55%	36 58%	43 49%	24 63%	14 56%	12 32%	18 55%	13 59%	11 38%	3 23%
Other food / grocery shops e.g. butcher, bakery, etc	122 31%	15 28%	19 31%	27 31%	6 16%	8 32%	17 46%	11 33%	5 23%	9 31%	5 38%
Other non food shops e.g. clothes shops, electrical stores, furniture shops, post office, chemist, hairdressers, beauty salon, etc	90 23%	11 21%	10 16%	20 23%	8 21%	5 20%	10 27%	4 12%	6 27%	10 34%	6 46%
Eateries e.g. cafe, restaurant, coffee shop, etc	19 5%	4 8%	4 6%	1 1%	1 3%	3 12%	3 8%	1 3%	1 5%	-	1 8%
Services e.g. Banks, Solicitors, Insurance, etc	9 2%	1 2%	2 3%	2 2%	1 3%	1 4%	1 3%	-	1 5%	-	-
Leisure facilities e.g. gym, swimming pool, etc	2 1%	-	-	1 1%	-	-	-	-	-	-	1 8%
Entertainment facilities e.g. cinema, bowling, etc	2 1%	-	-	1 1%	-	-	1 3%	-	-	-	-
Cultural facilities e.g. theatre, museums, etc	-	-	-	-	-	-	-	-	-	-	-
Licensed premises e.g. pub, betting office, bingo, etc	-	-	-	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-	-	-	-

Q7. On average how much do you spend on food/groceries each week? by Catchment area

Counts Break % Respondents	Total	Catchment area									
		Ballymun A	Ballymun B	Ballymun C	Ballymun D	Ballymun E	Ballymun F	Ballygal C	Whitehall A	Whitehall B	Airport
Base	400	53	62	88	38	25	37	33	22	29	13
Q7											
Less than €20	2 1%	-	-	-	-	-	-	1 3%	-	1 3%	-
€21-40	31 8%	3 6%	6 10%	7 8%	3 8%	3 12%	3 8%	3 9%	2 9%	1 3%	-
€41-60	64 16%	9 17%	13 21%	12 14%	8 21%	5 20%	6 16%	2 6%	2 9%	7 24%	-
€61-80	60 15%	14 26%	8 13%	13 15%	8 21%	3 12%	2 5%	3 9%	2 9%	3 10%	4 31%
€81-100	61 15%	6 11%	8 13%	16 18%	6 16%	1 4%	4 11%	8 24%	3 14%	7 24%	2 15%
€101-120	51 13%	7 13%	13 21%	10 11%	3 8%	4 16%	5 14%	4 12%	2 9%	2 7%	1 8%
€121-140	29 7%	3 6%	3 5%	6 7%	1 3%	2 8%	6 16%	2 6%	3 14%	2 7%	1 8%
€141-160	40 10%	2 4%	9 15%	12 14%	3 8%	3 12%	1 3%	3 9%	3 14%	1 3%	3 23%
€161-180	12 3%	2 4%	-	3 3%	3 8%	-	2 5%	1 3%	-	-	1 8%
€181-200	9 2%	1 2%	1 2%	2 2%	-	1 4%	-	-	3 14%	1 3%	-
€201-220	4 1%	1 2%	-	-	-	1 4%	1 3%	-	-	1 3%	-
€221-240	4 1%	1 2%	1 2%	1 1%	-	-	-	-	-	1 3%	-
Don't know	25 6%	3 6%	-	5 6%	2 5%	2 8%	5 14%	4 12%	2 9%	2 7%	-
Other	2 1%	-	-	-	1 3%	-	-	1 3%	-	-	-
Prefer not to say	6 2%	1 2%	-	1 1%	-	-	2 5%	1 3%	-	-	1 8%

Q8. If you shop online can I ask what percentage of your total food shopping is carried out on the internet, roughly speaking? by Catchment area

Counts Break % Respondents	Total	Catchment area									
		Ballymun A	Ballymun B	Ballymun C	Ballymun D	Ballymun E	Ballymun F	Ballygal C	Whitehall A	Whitehall B	Airport
Base	400	53	62	88	38	25	37	33	22	29	13
Q8											
None - don't shop online	381 95%	50 94%	57 92%	85 97%	38 100%	25 100%	34 92%	33 100%	22 100%	27 93%	10 77%
0-10%	9 2%	2 4%	2 3%	1 1%	- -	- -	2 5%	- -	- -	- -	2 15%
11-20%	3 1%	1 2%	1 2%	1 1%	- -	- -	- -	- -	- -	- -	- -
21-30%	1 0%	- -	- -	1 1%	- -	- -	- -	- -	- -	- -	- -
31-40%	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
41-50%	1 0%	- -	- -	- -	- -	- -	- -	- -	- -	1 3%	- -
51-60%	1 0%	- -	- -	- -	- -	- -	- -	- -	- -	- -	1 8%
61-70%	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
71-80%	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
81-90%	1 0%	- -	1 2%	- -	- -	- -	- -	- -	- -	- -	- -
91-100%	3 1%	- -	1 2%	- -	- -	- -	1 3%	- -	- -	1 3%	- -
Don't know	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
Prefer not to say	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -

Q9. Outside of your main food/grocery trip where do you go for small, day-to-day TOP-UP food shopping (e.g. buying a pint of milk, newspaper, or loaf of bread)? by Catchment area

Counts Break % Respondents	Total	Catchment area									
		Ballymun A	Ballymun B	Ballymun C	Ballymun D	Ballymun E	Ballymun F	Ballygal C	Whitehall A	Whitehall B	Airport
Base	400	53	62	88	38	25	37	33	22	29	13
Q9											
Ausra store, Gateway Building, Ballymun	1 0%	-	-	1 1%	-	-	-	-	-	-	-
Centra, Civic Centre, Ballymun	15 4%	5 9%	2 3%	8 9%	-	-	-	-	-	-	-
Centra, Coultry (Neighbourhood Centre)	23 6%	2 4%	-	20 23%	-	-	-	-	-	-	1 8%
Centra, Hampton Wood	18 5%	16 30%	2 3%	-	-	-	-	-	-	-	-
Centra - Quinn's, Poppintree Parade (Neighbourhood Centre)	49 12%	14 26%	30 48%	1 1%	3 8%	1 4%	-	-	-	-	-
Centra, St Pappin's Road	3 1%	1 2%	-	-	-	-	-	1 3%	1 5%	-	-
Esso Garage, Ballymun Road	1 0%	-	-	1 1%	-	-	-	-	-	-	-
Eurospar, 131 Ballymun Road	20 5%	1 2%	-	1 1%	-	5 20%	1 3%	8 24%	2 9%	2 7%	-
Eurospar, Century Business Park, Meakstown	-	-	-	-	-	-	-	-	-	-	-
Eurospar, Gulliver's Retail Park, Northwood	2 1%	-	-	-	-	-	-	-	-	-	2 15%
Gala, Willow Park	12 3%	-	-	-	-	3 12%	9 24%	-	-	-	-
Late shop, Shanard Road	1 0%	-	-	1 1%	-	-	-	-	-	-	-
Mace, Glasnevin Avenue	8 2%	-	-	-	-	2 8%	-	6 18%	-	-	-

Q9. Outside of your main food/grocery trip where do you go for small, day-to-day TOP-UP food shopping (e.g. buying a pint of milk, newspaper, or loaf of bread)? by Catchment area

Counts Break % Respondents	Total	Catchment area									
		Ballymun A	Ballymun B	Ballymun C	Ballymun D	Ballymun E	Ballymun F	Ballygal C	Whitehall A	Whitehall B	Airport
Base	400	53	62	88	38	25	37	33	22	29	13
Quinn's Daybreak, Silloge Road (Neighbourhood Centre)	11 3%	2 4%	-	-	9 24%	-	-	-	-	-	-
Spar, Dublin City University	2 1%	-	-	-	-	-	-	-	-	2 7%	-
Spar, Glasnevin Avenue	23 6%	2 4%	3 5%	2 2%	-	2 8%	5 14%	7 21%	-	-	2 15%
Tesco Express, Glasnevin Avenue	19 5%	-	-	1 1%	1 3%	5 20%	11 30%	-	-	-	1 8%
Topaz Garage, Ballymun	1 0%	-	-	-	1 3%	-	-	-	-	-	-
Other	211 53%	12 23%	28 45%	54 61%	26 68%	8 32%	18 49%	13 39%	19 86%	26 90%	7 54%

Q10. Can you please tell me the location where you choose to do most of your shopping for items like clothes, shoes and other fashion items like jewellery, handbags, etc? by Catchment area

Counts Break % Respondents	Total	Catchment area									
		Ballymun A	Ballymun B	Ballymun C	Ballymun D	Ballymun E	Ballymun F	Ballygal C	Whitehall A	Whitehall B	Airport
Base	400	53	62	88	38	25	37	33	22	29	13
Q10											
Blanchardstown Shopping Centre	70 18%	17 32%	10 16%	14 16%	8 21%	4 16%	12 32%	- -	1 5%	2 7%	2 15%
Charlestown Shopping Centre, Meakstown	36 9%	7 13%	11 18%	6 7%	1 3%	4 16%	3 8%	3 9%	- -	1 3%	- -
Dublin City Centre	227 57%	26 49%	32 52%	46 52%	22 58%	15 60%	22 59%	20 61%	16 73%	23 79%	5 38%
Dundrum Town Centre, South Dublin	-	-	-	-	-	-	-	-	-	-	-
Gulliver's Retail Park, Northwood	-	-	-	-	-	-	-	-	-	-	-
Liffey Valley Shopping Centre	1 0%	-	-	-	-	-	-	1 3%	-	-	-
Northside Shopping Centre, Coolock	-	-	-	-	-	-	-	-	-	-	-
OMNI Retail Park, Santry	80 20%	9 17%	16 26%	32 36%	12 32%	-	2 5%	3 9%	1 5%	4 14%	1 8%
Pavilions Shopping Centre, Swords	14 4%	3 6%	-	5 6%	-	-	-	1 3%	-	1 3%	4 31%
Tesco Extra, Clearwater, Finglas	1 0%	-	-	-	-	1 4%	-	-	-	-	-
Online / internet	18 5%	3 6%	1 2%	9 10%	1 3%	1 4%	-	-	1 5%	-	2 15%
Don't know	2 1%	-	-	1 1%	-	-	1 3%	-	-	-	-
Other	19 5%	1 2%	2 3%	3 3%	1 3%	2 8%	-	5 15%	4 18%	1 3%	-

Q11. How do you normally travel to that centre / these centres? by Catchment area

Counts Break % Respondents	Total	Catchment area									
		Ballymun A	Ballymun B	Ballymun C	Ballymun D	Ballymun E	Ballymun F	Ballygal C	Whitehall A	Whitehall B	Airport
Base	400	53	62	88	38	25	37	33	22	29	13
Q11											
Car	170 43%	23 43%	34 55%	31 35%	12 32%	15 60%	21 57%	9 27%	9 41%	10 34%	6 46%
Walk	24 6%	3 6%	-	14 16%	2 5%	1 4%	-	-	2 9%	1 3%	1 8%
Bus	178 45%	23 43%	24 39%	34 39%	23 61%	9 36%	16 43%	19 58%	8 36%	18 62%	4 31%
Taxi	1 0%	-	1 2%	-	-	-	-	-	-	-	-
Train	-	-	-	-	-	-	-	-	-	-	-
Cycle	5 1%	1 2%	1 2%	2 2%	-	-	-	1 3%	-	-	-
Shop online only	8 2%	2 4%	-	4 5%	-	-	-	-	-	-	2 15%
Other	14 4%	1 2%	2 3%	3 3%	1 3%	-	-	4 12%	3 14%	-	-

Q12. How long does the journey take? by Catchment area

Counts Break % Respondents	Total	Catchment area									
		Ballymun A	Ballymun B	Ballymun C	Ballymun D	Ballymun E	Ballymun F	Ballygal C	Whitehall A	Whitehall B	Airport
Base	400	53	62	88	38	25	37	33	22	29	13
Q12											
0 - 5 minutes	13 3%	2 4%	3 5%	3 3%	- -	1 4%	2 5%	- -	1 5%	1 3%	- -
6 - 10 minutes	37 9%	4 8%	8 13%	9 10%	4 11%	5 20%	- -	2 6%	2 9%	1 3%	2 15%
11 - 15 minutes	74 19%	12 23%	13 21%	18 20%	3 8%	3 12%	8 22%	8 24%	5 23%	2 7%	2 15%
16 - 20 minutes	86 22%	9 17%	10 16%	13 15%	10 26%	7 28%	8 22%	5 15%	6 27%	15 52%	3 23%
21 - 30 minutes	118 30%	8 15%	20 32%	31 35%	14 37%	7 28%	11 30%	13 39%	4 18%	7 24%	3 23%
31 - 45 minutes	35 9%	12 23%	3 5%	5 6%	4 11%	1 4%	6 16%	1 3%	1 5%	2 7%	- -
46 - 60 minutes	9 2%	2 4%	2 3%	2 2%	2 5%	- -	- -	- -	- -	- -	1 8%
An hour or more	5 1%	1 2%	- -	- -	- -	1 4%	1 3%	1 3%	- -	1 3%	- -
Don't know	15 4%	1 2%	3 5%	3 3%	1 3%	- -	1 3%	3 9%	3 14%	- -	- -
Shop online only	8 2%	2 4%	- -	4 5%	- -	- -	- -	- -	- -	- -	2 15%

Q13. Why do you choose to shop at that centre/these centres? by Catchment area

Counts Break % Respondents	Total	Catchment area									
		Ballymun A	Ballymun B	Ballymun C	Ballymun D	Ballymun E	Ballymun F	Ballygal C	Whitehall A	Whitehall B	Airport
Base	400	53	62	88	38	25	37	33	22	29	13
Q13											
Convenient / close to home	100 25%	13 25%	14 23%	28 32%	9 24%	8 32%	5 14%	3 9%	8 36%	6 21%	6 46%
Convenient / close to work	18 5%	4 8%	3 5%	1 1%	1 3%	3 12%	2 5%	1 3%	- -	1 3%	2 15%
Free parking	23 6%	3 6%	2 3%	6 7%	1 3%	1 4%	7 19%	2 6%	1 5%	- -	- -
On the bus route	14 4%	3 6%	- -	4 5%	2 5%	1 4%	1 3%	2 6%	- -	1 3%	- -
Wide range of goods available	245 61%	35 66%	39 63%	56 64%	27 71%	11 44%	23 62%	17 52%	10 45%	21 72%	6 46%
Reasonable prices	24 6%	12 23%	6 10%	4 5%	- -	1 4%	- -	- -	- -	1 3%	- -
Preference to shop at a particular store	36 9%	5 9%	2 3%	4 5%	1 3%	5 20%	6 16%	5 15%	3 14%	3 10%	2 15%
Near to other shops so can shop around	13 3%	- -	1 2%	2 2%	2 5%	- -	7 19%	- -	1 5%	- -	- -
Habit, have always used the store	19 5%	- -	- -	2 2%	2 5%	2 8%	5 14%	2 6%	6 27%	- -	- -
Don't know	1 0%	1 2%	- -	- -	- -	- -	- -	- -	- -	- -	- -
Other	44 11%	5 9%	8 13%	6 7%	4 11%	1 4%	4 11%	5 15%	6 27%	5 17%	- -

Q14. Do you visit other shops, businesses, or places of leisure or entertainment when you shop for these goods? If so, which type of premises do you visit? by Catchment area

Counts Break % Respondents	Total	Catchment area									
		Ballymun A	Ballymun B	Ballymun C	Ballymun D	Ballymun E	Ballymun F	Ballygal C	Whitehall A	Whitehall B	Airport
Base	400	53	62	88	38	25	37	33	22	29	13
Q14											
No - don't visit other shops, businesses or places of leisure or entertainment	184 46%	25 47%	30 48%	42 48%	14 37%	13 52%	6 16%	18 55%	15 68%	16 55%	5 38%
Food / grocery shops e.g. supermarket, butcher, bakery, etc	44 11%	6 11%	11 18%	8 9%	4 11%	4 16%	7 19%	- -	- -	1 3%	3 23%
Other non-food shops e.g. electrical stores, furniture shops, post office, chemist, hairdressers, etc	81 20%	5 9%	11 18%	11 13%	10 26%	3 12%	23 62%	7 21%	1 5%	3 10%	7 54%
Eateries e.g. Cafe, restaurant, coffee shop, etc	126 32%	18 34%	19 31%	25 28%	18 47%	5 20%	18 49%	9 27%	4 18%	9 31%	1 8%
Services e.g. Banks, Solicitors, Insurance, etc	8 2%	4 8%	1 2%	- -	3 8%	- -	- -	- -	- -	- -	- -
Entertainment facilities e.g. cinema, bowling, etc	16 4%	5 9%	2 3%	5 6%	- -	- -	2 5%	- -	2 9%	- -	- -
Cultural facilities e.g. theatre, museums, etc	3 1%	- -	1 2%	1 1%	- -	1 4%	- -	- -	- -	- -	- -
Leisure facilities e.g. Gym, swimming pool, etc	2 1%	- -	1 2%	1 1%	- -	- -	- -	- -	- -	- -	- -
Licensed premises e.g. pub, betting office, bingo, etc	3 1%	- -	1 2%	- -	- -	1 4%	- -	- -	1 5%	- -	- -
Other	1 0%	- -	- -	1 1%	- -	- -	- -	- -	- -	- -	- -

Q15. If you shop on the Internet for clothes and footwear and other fashion items can I ask what percentage of your total expenditure on these items is carried out online - approximately? by Catchment area

Counts Break % Respondents	Total	Catchment area									
		Ballymun A	Ballymun B	Ballymun C	Ballymun D	Ballymun E	Ballymun F	Ballygal C	Whitehall A	Whitehall B	Airport
Base	400	53	62	88	38	25	37	33	22	29	13
Q15											
None - don't shop online for these types of goods	289 72%	33 62%	42 68%	54 61%	30 79%	22 88%	30 81%	30 91%	16 73%	23 79%	9 69%
0-10%	46 12%	8 15%	8 13%	14 16%	4 11%	1 4%	2 5%	2 6%	2 9%	4 14%	1 8%
11-20%	17 4%	3 6%	3 5%	4 5%	2 5%	-	1 3%	-	3 14%	-	1 8%
21-30%	14 4%	4 8%	2 3%	4 5%	-	-	2 5%	1 3%	-	1 3%	-
31-40%	3 1%	-	-	2 2%	-	-	1 3%	-	-	-	-
41-50%	9 2%	1 2%	-	4 5%	2 5%	-	1 3%	-	1 5%	-	-
51-60%	4 1%	1 2%	2 3%	-	-	1 4%	-	-	-	-	-
61-70%	1 0%	1 2%	-	-	-	-	-	-	-	-	-
71-80%	1 0%	-	1 2%	-	-	-	-	-	-	-	-
81-90%	1 0%	-	1 2%	-	-	-	-	-	-	-	-
91-100%	8 2%	2 4%	-	4 5%	-	-	-	-	-	-	2 15%
Don't know	6 2%	-	3 5%	1 1%	-	1 4%	-	-	-	1 3%	-
Prefer not to say	1 0%	-	-	1 1%	-	-	-	-	-	-	-

Q16. Can I ask where you do most of your shopping for large bulky items like electrical goods (e.g. fridges, washing machines) and furniture (e.g. Sofas, beds, wardrobes)? by Catchment area

Counts Break % Respondents	Total	Catchment area									
		Ballymun A	Ballymun B	Ballymun C	Ballymun D	Ballymun E	Ballymun F	Ballygal C	Whitehall A	Whitehall B	Airport
Base	400	53	62	88	38	25	37	33	22	29	13
Q16											
Airside Retail Park, Swords	58 15%	2 4%	9 15%	22 25%	1 3%	6 24%	5 14%	2 6%	4 18%	5 17%	2 15%
Blanchardstown Shopping Centre	30 8%	8 15%	2 3%	4 5%	1 3%	3 12%	7 19%	2 6%	3 14%	-	-
Charlestown Shopping Centre, Meakstown	5 1%	1 2%	1 2%	1 1%	-	2 8%	-	-	-	-	-
Clearwater, Finglas	71 18%	5 9%	19 31%	10 11%	3 8%	6 24%	17 46%	5 15%	5 23%	1 3%	-
Dublin City Centre	16 4%	3 6%	1 2%	3 3%	3 8%	1 4%	2 5%	2 6%	1 5%	-	-
Gulliver's Retail Park, Northwood	4 1%	-	2 3%	1 1%	1 3%	-	-	-	-	-	-
IKEA	22 6%	5 9%	2 3%	2 2%	2 5%	1 4%	5 14%	-	1 5%	1 3%	3 23%
Liffey Valley Shopping Centre / Retail Park	-	-	-	-	-	-	-	-	-	-	-
OMNI Park, Santry	13 3%	2 4%	3 5%	4 5%	1 3%	-	-	1 3%	-	-	2 15%
Northside Shopping Centre, Coolock	4 1%	-	1 2%	2 2%	1 3%	-	-	-	-	-	-
Pavilions Shopping Centre, Swords	4 1%	-	1 2%	3 3%	-	-	-	-	-	-	-
Online / internet	13 3%	1 2%	2 3%	3 3%	5 13%	-	-	-	-	1 3%	1 8%
Don't know	36 9%	11 21%	1 2%	9 10%	2 5%	1 4%	3 8%	2 6%	5 23%	1 3%	1 8%
Other	160 40%	18 34%	22 35%	30 34%	20 53%	7 28%	11 30%	21 64%	6 27%	20 69%	5 38%

Q17. Have you visited or do you visit the Ballymun area for shopping? If so, how satisfied are you with shopping facilities available in Ballymun? by Catchment area

Counts Break % Respondents	Total	Catchment area									
		Ballymun A	Ballymun B	Ballymun C	Ballymun D	Ballymun E	Ballymun F	Ballygal C	Whitehall A	Whitehall B	Airport
Base	400	53	62	88	38	25	37	33	22	29	13
Q17											
No - don't go to Ballymun for shopping	224 56%	18 34%	16 26%	41 47%	13 34%	19 76%	35 95%	30 91%	19 86%	25 86%	8 62%
Very satisfied	6 2%	1 2%	- -	2 2%	- -	1 4%	- -	- -	1 5%	- -	1 8%
Satisfied	21 5%	2 4%	2 3%	9 10%	- -	3 12%	1 3%	1 3%	1 5%	1 3%	1 8%
Neither satisfied nor dissatisfied	9 2%	1 2%	3 5%	1 1%	2 5%	- -	- -	- -	- -	- -	2 15%
Dissatisfied	39 10%	14 26%	5 8%	12 14%	4 11%	1 4%	1 3%	1 3%	1 5%	- -	- -
Very dissatisfied	99 25%	17 32%	36 58%	22 25%	19 50%	1 4%	- -	1 3%	- -	2 7%	1 8%
Don't know	2 1%	- -	- -	1 1%	- -	- -	- -	- -	- -	1 3%	- -

Q18. If dissatisfied or very dissatisfied with shopping in Ballymun can you explain why this is the case? by Catchment area

Counts Break % Respondents	Total	Catchment area									
		Ballymun A	Ballymun B	Ballymun C	Ballymun D	Ballymun E	Ballymun F	Ballygal C	Whitehall A	Whitehall B	Airport
Base	138	31	41	34	23	2	1	2	1	2	1
Q18											
Limited range of supermarkets available	133 96%	30 97%	40 98%	33 97%	23 100%	1 50%	1 100%	1 50%	1 100%	2 100%	1 100%
Limited range of fashion shops available	113 82%	27 87%	35 85%	24 71%	20 87%	1 50%	1 100%	1 50%	1 100%	2 100%	1 100%
Poor quality of shopping environment	31 22%	16 52%	3 7%	5 15%	5 22%	1 50%	- -	- -	- -	1 50%	- -
Expensive	12 9%	2 6%	6 15%	2 6%	- -	1 50%	- -	1 50%	- -	- -	- -
Don't feel safe	1 1%	1 3%	- -	- -	- -	- -	- -	- -	- -	- -	- -
General negative feeling about the area	17 12%	14 45%	2 5%	- -	1 4%	- -	- -	- -	- -	- -	- -
Lack of parking	5 4%	1 3%	1 2%	1 3%	1 4%	- -	- -	- -	1 100%	- -	- -
Too far to get to	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
Don't know	1 1%	- -	1 2%	- -	- -	- -	- -	- -	- -	- -	- -
Nothing in particular	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
Other	17 12%	4 13%	4 10%	5 15%	4 17%	- -	- -	- -	- -	- -	- -

**Q19. In terms of shopping, is there anything you would like to see improved in Ballymun in order to encourage you to shop in the area?
by Catchment area**

Counts Break % Respondents	Total	Catchment area									
		Ballymun A	Ballymun B	Ballymun C	Ballymun D	Ballymun E	Ballymun F	Ballygal C	Whitehall A	Whitehall B	Airport
Base	400	53	62	88	38	25	37	33	22	29	13
Q19											
Better choice of supermarkets	227 57%	38 72%	51 82%	57 65%	25 66%	12 48%	18 49%	9 27%	8 36%	2 7%	7 54%
Better choice of fashion shops	193 48%	38 72%	46 74%	45 51%	24 63%	7 28%	14 38%	7 21%	5 23%	2 7%	5 38%
Cheaper prices	21 5%	12 23%	1 2%	2 2%	2 5%	2 8%	- -	1 3%	1 5%	- -	- -
Greater security	11 3%	7 13%	2 3%	- -	- -	- -	- -	- -	2 9%	- -	- -
More parking spaces	21 5%	6 11%	3 5%	- -	- -	2 8%	3 8%	1 3%	6 27%	- -	- -
Better bus services	9 2%	3 6%	1 2%	4 5%	- -	- -	- -	- -	- -	- -	1 8%
Would never shop at Ballymun	25 6%	2 4%	- -	3 3%	1 3%	1 4%	14 38%	- -	1 5%	3 10%	- -
Don't know	17 4%	- -	1 2%	1 1%	- -	2 8%	1 3%	5 15%	1 5%	6 21%	- -
Nothing	59 15%	5 9%	2 3%	6 7%	1 3%	10 40%	2 5%	10 30%	10 45%	10 34%	3 23%
Other	123 31%	11 21%	16 26%	36 41%	25 66%	4 16%	6 16%	11 33%	1 5%	8 28%	5 38%

Q20. Apart from shopping, is there anything you would like to see introduced to Ballymun in order to make it a more attractive place to visit? by Catchment area

Counts Break % Respondents	Total	Catchment area									
		Ballymun A	Ballymun B	Ballymun C	Ballymun D	Ballymun E	Ballymun F	Ballygal C	Whitehall A	Whitehall B	Airport
Base	400	53	62	88	38	25	37	33	22	29	13
Q20											
More places to eat e.g. restaurants, cafes, coffee houses	81 20%	16 30%	18 29%	13 15%	19 50%	3 12%	4 11%	4 12%	1 5%	2 7%	1 8%
More community/cultural events e.g. dances, theatre shows, festivals, etc.	8 2%	4 8%	2 3%	1 1%	- -	- -	1 3%	- -	- -	- -	- -
More places of entertainment e.g. cinema, bowling, bingo club	95 24%	18 34%	19 31%	32 36%	13 34%	3 12%	1 3%	3 9%	2 9%	- -	4 31%
More leisure/recreational facilities e.g. 3G pitches, private gym	30 8%	8 15%	4 6%	6 7%	2 5%	2 8%	2 5%	1 3%	1 5%	1 3%	3 23%
More social facilities e.g. bars, betting offices, nightclubs	30 8%	8 15%	4 6%	8 9%	4 11%	2 8%	2 5%	- -	- -	1 3%	1 8%
Environmental improvements such as paving, landscaping, lighting, seating (please specify below)	10 3%	2 4%	1 2%	1 1%	1 3%	2 8%	1 3%	1 3%	1 5%	- -	- -
Traffic calming measures such as speed ramps, traffic islands, traffic lights (please specify below)	4 1%	1 2%	- -	1 1%	- -	- -	- -	- -	1 5%	1 3%	- -
Improved signposting	1 0%	- -	1 2%	- -	- -	- -	- -	- -	- -	- -	- -
Other	219 55%	24 45%	23 37%	41 47%	11 29%	17 68%	30 81%	24 73%	19 86%	24 83%	6 46%

Q21. Do you visit Ballymun Main Street in the evenings after 6pm? If so, what is the purpose of your visit? by Catchment area

Counts Break % Respondents	Total	Catchment area									
		Ballymun A	Ballymun B	Ballymun C	Ballymun D	Ballymun E	Ballymun F	Ballygal C	Whitehall A	Whitehall B	Airport
Base	400	53	62	88	38	25	37	33	22	29	13
Q21											
Don't visit in the evening	340 85%	46 87%	50 81%	71 81%	24 63%	24 96%	34 92%	32 97%	22 100%	26 90%	11 85%
To shop	15 4%	1 2%	2 3%	4 5%	7 18%	- -	- -	- -	- -	1 3%	- -
To eat out	8 2%	1 2%	3 5%	- -	3 8%	- -	- -	- -	- -	1 3%	- -
To work (business)	5 1%	- -	- -	2 2%	1 3%	- -	- -	1 3%	- -	- -	1 8%
Leisure/recreational purposes e.g. gym, playing sports, walking	17 4%	3 6%	5 8%	6 7%	1 3%	- -	- -	- -	- -	1 3%	1 8%
Entertainment purposes e.g. cinema, bingo	2 1%	2 4%	- -	- -	- -	- -	- -	- -	- -	- -	- -
Going to licensed premises e.g. going to public house, betting office	2 1%	- -	- -	2 2%	- -	- -	- -	- -	- -	- -	- -
Social purposes e.g. visiting friends or relatives	7 2%	- -	1 2%	3 3%	- -	1 4%	1 3%	- -	- -	1 3%	- -
Cultural purposes e.g. going to theatre	10 3%	2 4%	1 2%	1 1%	3 8%	1 4%	2 5%	- -	- -	- -	- -
Community purposes e.g. attending a community meeting or event	1 0%	- -	1 2%	- -	- -	- -	- -	- -	- -	- -	- -
Educational purposes e.g. attending evening classes, parents night	1 0%	1 2%	- -	- -	- -	- -	- -	- -	- -	- -	- -
Other	1 0%	- -	1 2%	- -	- -	- -	- -	- -	- -	- -	- -

Q22. Finally, can I ask which age group you belong to? by Catchment area

Counts Break % Respondents	Total	Catchment area									
		Ballymun A	Ballymun B	Ballymun C	Ballymun D	Ballymun E	Ballymun F	Ballygal C	Whitehall A	Whitehall B	Airport
Base	400	53	62	88	38	25	37	33	22	29	13
Q22											
Under 20	7 2%	1 2%	2 3%	2 2%	-	-	1 3%	-	-	1 3%	-
20-29	37 9%	11 21%	3 5%	9 10%	7 18%	1 4%	2 5%	-	1 5%	-	3 23%
30-39	45 11%	19 36%	10 16%	5 6%	2 5%	-	1 3%	-	-	1 3%	7 54%
40-49	68 17%	7 13%	13 21%	24 27%	8 21%	3 12%	7 19%	2 6%	1 5%	2 7%	1 8%
50-65	108 27%	10 19%	12 19%	23 26%	14 37%	5 20%	14 38%	12 36%	9 41%	8 28%	1 8%
Over 65	129 32%	5 9%	20 32%	24 27%	6 16%	15 60%	11 30%	19 58%	11 50%	17 59%	1 8%
Refused	6 2%	-	2 3%	1 1%	1 3%	1 4%	1 3%	-	-	-	-

Q23. Gender by Catchment area

Counts Break % Respondents	Total	Catchment area									
		Ballymun A	Ballymun B	Ballymun C	Ballymun D	Ballymun E	Ballymun F	Ballygal C	Whitehall A	Whitehall B	Airport
Base	400	53	62	88	38	25	37	33	22	29	13
Q23											
Male	108 27%	15 28%	16 26%	22 25%	9 24%	10 40%	12 32%	12 36%	2 9%	8 28%	2 15%
Female	292 73%	38 72%	46 74%	66 75%	29 76%	15 60%	25 68%	21 64%	20 91%	21 72%	11 85%

Appendix 4 Retail Expenditure Guide 2014-2015

04

The top left corner of the page features three thin, black, intersecting lines that create a series of geometric shapes, including a triangle and several quadrilaterals. The lines are thin and extend from the top and left edges towards the center of the page.

Appendix 5a Report of Consultations

05a



Appendix 5b B4B Meeting Note

05b

Project: **Ballymun Retail Strategy**

Job No: **47075686**

Subject: **Ballymun Business Network Draft Meeting Notes**

Prepared by: **Laura Michael**

Date: **Meeting on 10th September 2015**

Checked by: **Una Somerville**

Date: **15th September 2015**

Approved by: **Una Somerville**

Date: **18th September 2015**

1. Aecom provided a powerpoint presentation of the scope, survey methodology, consultation strategy and timeframe for the Ballymun Retail Strategy.

Table 1 Theme	Current Vision	Future Vision
Atmosphere	Grey Dire Bleak Dull Terrible Grim	Vibrant Exciting Thriving Busy
Amenities	No Diversity Empty Lacking Sparse Inadequate	Employment Opportunity Local Value Diverse Relevant Creative
Accessibility	Inconvenient Challenging	Untapped

2. Aecom then suggested the attendees break into two groups and both individually and collectively list three separate words that describe Ballymun Retail scene currently and as people/groups would like to see it in the future. Table 1 is a summary of the individuals' commentary

3. After the formal presentation – two representations were made directly to Aecom raising concerns over the shopping centre and how it has been handled. Issues of poor morale and communication were identified. Also the decision making processes of decant and

relocation, moving the market etc were cited as legacy issues that need to be addressed.

4. Summary comments from the two groups:

Current vision:

- Fantastic location
- Reputation of area/stigma/perception
- Concentration of retail facilities
- Lack of secure parking
- Lack of parking for shops
- No focal point
- Just a thoroughfare
- Weekends quiet
- Community story

Future vision:

- Tapping into the airport
- Employment & Income are key
- People want a variety of opportunities on their doorstep
- Outlet Centre
- Ikea – where are shoppers coming from – can we tap into them?
- Lure of M50/Metro opportunities of transportation links
- Glasnevin/area to tap into.

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Retail Expenditure Guide

Covering the 2013-Based
Expenditure Release

2014/2015

Product Guide

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November 2014

Table of Contents

Chapter 1: Introduction	5
Introduction	6
Chapter 2: Customer Retail Spending Estimates	8
The Estimates - What is Available?	9
Methodology - How They are Produced	11
Alcohol and Tobacco Expenditure	12
Regional Expenditure Estimates	12
Local Area Expenditure Estimates	12
Detailed Category Definitions.....	14
Food	14
Alcoholic Drink	14
Tobacco.....	14
Books, Newspapers and Magazines.....	14
Furniture, Floor Coverings and Household Textiles	15
Audio-Visual Equipment and Other Durable Goods	16
Hardware and DIY Supplies	16
Other Goods.....	17
Bulky Goods	19
Total DIY Related Goods	19
Time Series Estimates	20
Leisure Goods and Services Expenditure.....	20
Detailed Category Definitions	21
Other Expenditure Categories.....	22
Detailed Category Definitions	22
Chapter 3: Using the Retail Spending Estimates	25
Special Forms of Trading.....	26
Data Issues	26
Breakdowns and Projections	28
Conceptual Issues	31
Sales Densities	32
Recent Trends.....	33
Longer-run Trends.....	33

Table of Contents

Oxford Economics' Forecasts	35
Trend Projections	37
Prices	43
Appendix A: Base Area Profile Report.....	44

1

Chapter 1: Introduction

In this Chapter:

- ♦ Introduction 6

Introduction

Pitney Bowes Software Consumer Retail Expenditure estimates for small areas have been compiled by Oxford Economics in association with Pitney Bowes Software Corporation to meet the requirements of retail and market planners and analysts for comprehensive, accurate and up to date information about the patterns of expenditure in small local market areas. This guide describes the 2013-based estimates, projections and forecasts. These are fully consistent with the latest official ONS estimates of consumer spending in the UK¹.

Consumer Retail Expenditure estimates are also available as data sets for all Census Output Areas and postcode sectors in the United Kingdom, totalling approximately 223,000 Output Areas and 9,500 postcode sectors. For any of these options contact Pitney Bowes Software Corporation.

Area profiles reports may be defined in terms of Census or postal geography, or as custom areas such as mapped or digitised areas, polygon boundary files or drive time isochrones. The size of the area can range from a few Census Output Areas, representing the walk-in catchment of a small corner store, to a four hour drive time isochrone for a new leisure development - or even larger.

For each area, information is provided on the total expenditure generated by the resident population and households of the area, the average expenditure per household in the area, and the average expenditure per person in the area. Expenditure is presented in detailed commodity (goods) categories and aggregated to convenience and comparison goods summary categories.

The baseline consumer spending estimates and forecasts are currently available for 2012, 2013 and 2014 in current prices and for 2019, 2024 and 2025 in 2013 prices. The 2012 and 2013 estimates are consistent at the national level with the data published by the ONS. The forecast are taken from Oxford Economics published UK Macroeconomic forecasts and the local level estimates are modelled using various elements of the Economics Regional and Local forecasting services together with additional ONS data. The result is much more targeted to the prospects for a particular locality than simply taking the latest expenditure estimates for the area and growing them in line with national trend-based projections for the appropriate category of goods. This is partly because our consumer spending forecasts enable us to take account of changes in the underlying forces driving different elements of consumer spending in a much more sophisticated way than simply extrapolating trends. However, equally importantly, Oxford Economics' regional forecasts allow us to take account of how underlying differences in economic performance in different parts of the country are likely to affect relative spending power in different locations. Please contact Pitney Bowes Software if you would like more information on this.

1 The data available and in this Guide is consistent with ONS estimates released in August 2014.

Note that all Consumer Retail Expenditure estimates apply strictly to the area for which they were produced, and reflect the socio-economic characteristics of that area. The use of expenditure per household or expenditure per capita estimates to assess the consumer retail expenditure in other areas is not recommended. Any estimates obtained in this way are unlikely to correctly reflect the socio-economic characteristics of the new area.

The following chapters set out the steps that are involved in producing the estimates, which are designed to take the best possible account of available data on the overall spending patterns and how these will vary in different places. In summary:

- The methodology ensures full consistency with key primary data sources - Census, National Accounts, Living Costs and Food Survey, Annual Business Survey.
- Spending patterns are derived from the relative affluence of different areas, which is linked directly to Census data on occupational mix and employment rates.
- The methodology also reflects estimated income variation arising from differences in average earnings between areas for a given occupation, as well as differences in the mix of occupations between areas.

Following past practice, we have produced a number of "trend-based" projections of retail expenditure per head at the national level (see Chapter 3). These are based on simple time trends fitted over varying periods. The Oxford Economic forecasts, by contrast, are our "best" estimate of future changes. "Trend-based" projections are provided for users who prefer a value-free guide to future changes.

The rest of this guide is structured as follows:

- **CHAPTER 2** explains the retail spending estimates in more detail, setting out the definitions they are based on and the methodology used to produce them.
- **CHAPTER 3** provides information on using the retail spending estimates, including projecting them into the future and allowing for special forms of trading (non-store sales) and changing sales densities.
- Similarly, **CHAPTER 4** explains our estimates of retail business turnover potential, while **CHAPTER 5** discusses issues involved in using these estimates.
- An **APPENDIX** provides an Area Profile Report for the UK as a whole, giving baseline data for spending by category, and so on.

2

Chapter 2: Customer Retail Spending Estimates

In this chapter:

- ♦ The Estimates - What is Available? 9
- ♦ Methodology - How They are Produced 11
- ♦ Detailed Category Definitions14
- ♦ Time Series Estimates20
- ♦ Leisure Goods and Services Expenditure 20
- ♦ Other Expenditure Categories 22

The Estimates - What is Available?

Consumer retail spending estimates are available for the following main categories (COICOP² references in brackets).

Convenience

Goods:

- Food and non-alcoholic beverages (01)
- Alcoholic drink (off-licence sales) (02.1)
- Tobacco (02.2)
- Non-durable household goods (05.6.1)
- Newspapers and magazines (09.5.2)

Comparison

Goods:

- Books (09.5.1)
- Clothing and footwear (03)
- Furniture, floor coverings and household textiles (05.1.1, 05.1.2, 05.2)
- Audio-visual equipment and other durable goods (05.3.1, 05.3.2, 05.4, 05.5, 08.2, 09.1)
- Hardware and DIY supplies (04.3.1)
- Chemists' goods (06.1, 12.1.2, 12.1.3)
- Jewellery, watches and clocks (12.3.1)
- Bicycles (07.1.3)
- Recreational and other miscellaneous goods (09.2.2, 09.3, 09.5.3, 09.5.4, 12.3.2)

These definitions of convenience and comparison goods categories conform to the definitions in general use by retail planners. The table below provides more information on these categories, while Section 2.3 provides a full listing of the goods covered in each category. All estimates are inclusive of VAT and Special Forms of Trading.

Estimates and projections are available for individual Output Areas and for aggregated geographies based on these, for 2012, 2013 and 2014 (in current prices) and for 2019, 2024 and 2025 (in constant 2013 prices).

2 The classification system for consumption by purpose, used by the ONS and internationally.

Table 2.1 Expenditure Categories

Pitney Bowes Software Goods Category		Consumer Trends COICOP Categories
1.	Food	01.1.1 Bread and Cereals 01.1.2 Meat 01.1.3 Fish 01.1.4 Milk, Cheese and eggs 01.1.5 Oils and fats 01.1.6 Fruits 01.1.7 Vegetables 01.1.8 Sugar and sweet products 01.1.9 Food products n.e.c 01.2.1 Coffee, tea and cocoa 01.2.2 Mineral water and soft drinks
2.	Alcoholic drink	02.1.1 Spirits 02.1.2 Wine 02.1.3 Beers
3.	Tobacco	02.2 Tobacco
4.1	Books	09.5.1 Books
4.2	Newspapers and magazines	09.5.2 Newspaper and periodicals
5.1	Footwear	03.2.1 Shoes and other footwear 03.2.2 Repair and hire of clothing
5.2	Clothing	03.1.1 Clothing materials 03.1.2 Garments 03.1.3 Other articles of clothing/accessories 03.1.4 Cleaning, repair and hire of clothing
6.1	Furniture and floor coverings	05.1.1 Furniture and furnishings 05.1.2 Carpets and other floor coverings
6.2	Household textiles and soft furnishings	05.2 Household textiles
7.1	Domestic appliances	05.3.1 Major household appliances 05.3.2 Small electric household appliances
7.2	Audio -visual, photo graphics and optical goods	09.1.1 Audio visual equipment 09.1.2 Photographic and optical equipment 09.1.3 Information processing equipment 09.1.4 Recording media

Methodology - How They are Produced

Pitney Bowes Software Goods Category		Consumer Trends COICOP Categories
7.3	Telephone and fax equipments	08.2 Telephone and fax equipment
8.1	China, glass and utensils	05.4 Household utensils
8.2	DIY and decorator's supplies	04.3.1 Materials for maintenance and repair of the dwelling
8.3	Tools and equipment for house and garden	05.5.1 Major tools and equipments 05.5.2 Small tools and minor accessories
8.4	Gardens, plants and flowers	09.3.3 Gardens, plants and flowers
9.1	Chemists' Goods	06.1.1 Pharmaceutical products 06.1.2 Other medical products 06.1.3 Therapeutic equipment 12.1.2 Electric appliances for personal care 12.1.3 Other products for personal care
9.2	Jewellery, watches and clocks	12.3.1 Jewellery, watches and clocks
9.3	Non-durable household goods	05.6.1 Non-durable household goods
9.4	Bicycles	07.1.3 Bicycles
9.5	Recreational goods	09.2.2 Musical instruments and major durables for indoor recreation 09.3.1 Games, toys and hobbies 09.3.2 Sports, camping and open-air recreation equipment 09.3.4 Pets and related products
9.6	Other miscellaneous goods	09.5.3 Miscellaneous printed matter 09.5.4 Stationery and drawing materials 12.3.2 Other personal effects

Methodology - How They are Produced

National Expenditure Estimates

These are derived directly from official statistics, published by the Office for National Statistics in Consumer Trends. This provides a detailed breakdown of UK consumer spending, consistent with the UK National Accounts, classified according to the COICOP system, from which we extract those categories of consumers' expenditure that are relevant to retail spending. The Consumer Trends estimates (which subsequently appear in the Blue Book) provide the most reliable source of information on consumer retail expenditure, since it draws upon a wide range of sources, including the ONS Living Costs and Food Survey (published as Family Spending), the ONS Annual Business Survey (ABS), the Retail Sales Inquiry (RSI), government departments, nationalised industries and manufacturers.

Only COICOP categories relevant for retail spending are included. These exclude, for example, repair, maintenance, and spending in restaurants and hotels, or on sales of alcohol. The Blue Book compatible figures are used to calculate total consumer expenditure on those goods normally purchased through retail outlets. This includes all types of retail outlets, comprising all permanent and temporary shops, markets, roadside stalls, mobile shops, farm shops, roundsmen operating from depots, mail order, party plan,

automatic vending machines and credit traders.

The ONS estimates exclude spending by UK residents' abroad and are further adjusted by Oxford Economics to exclude spending by overseas visitors in UK retail outlets.

Consumer retail expenditure per capita is obtained by dividing the resulting expenditure by goods type by the latest ONS estimates of mid-year home population for the United Kingdom, as published in the ONS Population Trends.

Alcohol and Tobacco Expenditure

Data for both alcohol and tobacco are distorted by estimates of smuggled goods that are included in the official data. These should not be included in convenience good expenditure. In Consumer Trends, National Statistics published estimates of smuggling for these goods. Alcohol smuggling only represents a small share of the total spending, with no split available for on and off-licence sales.

Tobacco smuggling is more important, representing over 16% of total sales in 2008 - and has been increasing over the past decade. Data supplied on smuggling for 1994 to 2010 have been subtracted from total spending, with a suitable share of total tobacco spending also subtracted for other years. Even after this adjustment for smuggling, expenditure on tobacco appears to be too large. This still includes both retail and non-retail spending. Only the retail element is required. ABS data on retail turnover by commodity closely match other elements of spending defined on the COICOP system. The clear exception is for tobacco. Looking at the ABS data over a number of years suggests that only around 60% of the COICOP spending on tobacco, net of smuggling, is in retail establishments. The remainder is non-retail spending and has been removed from calculation.

Regional Expenditure Estimates

Although the main focus of the expenditure estimates is at the UK and local levels, the availability of spending data at the regional level from the Living Costs and Foods Survey (LCFS – formerly the Expenditure and Food Survey) makes these an important element of the process, and are used as control totals for the sum of spending across all Output Areas in a given region for a particular component of spending.

Since the 2013/2014 edition of the report, the shares of regional total spending are taken straight from the LCFS and applied to the UK total consumer spending from the National Accounts. One of the main advantages of using the LCFS estimates for total regional consumption is that they are consistent with the data that we use for splitting out the detailed spending categories within regions, as described below. Total regional consumption forecasts are driven by Oxford Economics' regional income forecasts and spending ratios (the inverse of savings ratios).

As a first approximation of regional spending patterns, shares of UK spending on detailed goods categories are applied to the total spending by region. This gives spending by region by category with the assumption that all regions share the UK spending profile. Estimates are then further refined by applying differences in regional patterns taken from the LCFS, the latest survey reports these detailed regional spending patterns for 2010-2012. Using this source, spending on a category in a region relative to the UK as a whole is calculated, and this ratio is applied to the regional shares produced earlier. As a final step, spending is scaled across regions to ensure that total spending on each goods category adds up to the UK total already estimated.

Local Area Expenditure Estimates

Expenditure on different commodities at the Output Area level is estimated through a combination of:

- The number of people living in the OA, broken down by broad age group, economic status and occupation
- Data on different average income levels for these different groups
- Information on how spending patterns differ across different socio-economic groups.

Methodology - How They are Produced

Local Area Expenditure Estimates - Population

Population data are taken from the Pitney Bowes Software 2011 Population, derived from the official 2011 Census Data, including a split into young (less than 16), working age (16-59 or 64) and pensioners where available.

Local Area Expenditure Estimates - Employment

Employment by occupational group, using the National Statistics Socio-economic Classification (NS-SEC) which includes unemployment, and economic inactivity, is taken from the Census. Figures are scaled where necessary to ensure consistency with working age population.

Local Area Expenditure Estimates - Incomes

Average incomes for different occupations in different parts of the country are derived from the Annual Survey of Hours and Earnings (formerly the New Earnings Survey), which provides detailed earnings by occupation at regional level and more summary (manual/non-manual) information at county level. We have used more detailed information now available from ASHE on average earnings by occupation at local authority level. Average incomes for the unemployed, economically inactive and pensioners are derived from the EFS.

Local Area Expenditure Estimates - Spending Patterns

The Living Costs and Food Survey (LCFC) (formerly the Expenditure and Food Survey and before that the Family Expenditure Survey) shows proportions of income spent on different goods by different types of households. Specifically, we apply spending patterns for different socio-economic groups to incomes of different broad occupations in each output area, plus spending patterns of unemployed and pensioners.

For output areas with relatively high or low numbers of children in the population, we also make an allowance for differences in spending patterns between households with and without children.

Local Area Expenditure Estimates - Scaling and Aggregation

Estimates are scaled where necessary to ensure consistency with estimates at regional level on the amount of spending on different goods (derived as discussed previously).

Intermediate geographies are calculated by adding up the appropriate output areas in turn into:

- Wards
- Local authorities
- Counties/unitary authorities

Detailed Category Definitions

Pitney Bowes Software Consumer Retail Expenditure estimates for small areas provide details of expenditure, inclusive of VAT and special forms of trading, by 19 detailed goods categories grouped under six broad headings and three summary headings. Expenditure is aggregated into a total Convenience goods category, a total Comparison goods category, and an overall Total expenditure category.

The detailed goods categories are based on the COICOP categories used in Consumer Trends. A description of each of the detailed categories is given below. The broad categories are simply combinations of the appropriate detailed categories.

Food

All food and non-alcoholic beverages bought by households for consumption at home. Personal expenditure on food and drink from catering establishments for consumption on or off the premises is excluded. Thus expenditure at cafes, restaurants, hotels, fish and chip shops, fast food outlets, canteens, office dining rooms, schools and communal establishments is excluded. Personal expenditure on food from vending machines and from catering services is also excluded.

Alcoholic Drink

All alcoholic drink bought by consumers from retail outlets, wine and spirit merchants, and off-licences for consumption at home. Low or non-alcoholic beverages that are generally alcoholic, such as non-alcoholic beer, are included in this category. Alcoholic drink for immediate consumption from non-retail outlets such as public houses, hotels, restaurants, other commercial catering establishments and non-profit making clubs is excluded.

Tobacco

All consumer expenditure on tobacco products in retail outlets.

Books, Newspapers and Magazines

Books

All consumer retail expenditure on books, including atlases, dictionaries, encyclopaedias, textbooks, guidebooks and musical scores; scrapbooks and albums for children; and bookbinding costs. Pre-recorded tapes and compact discs of novels, plays, poetry, etc. and pre-recorded diskettes and CD-ROMs containing books, dictionaries, encyclopaedias, foreign language trainers, etc. in the form of software (see Audio-Visual Equipment, Photographic and Optical Goods); and stamp albums (see Recreational Goods and Other Miscellaneous Goods) are excluded.

Newspapers and Magazines

All consumer retail expenditure on newspapers, magazines and other periodicals. Expenditure on maps and globes (see Recreational Goods and Other Miscellaneous Goods) is excluded.

Detailed Category Definitions

Footwear

All consumer retail expenditure on shoes and other footwear (including boots, slippers, etc. but excluding orthopaedic footwear, which is included under Chemists' Goods); sports footwear suitable for everyday or leisure wear (but excluding game-specific footwear such as ski boots, football boots, golfing shoes and other such footwear fitted with ice-skates, rollers, spikes, studs, etc., which is included under Recreational Goods and Other Miscellaneous Goods); gaiters, leggings and similar articles (but excluding shin-guards, cricket pads and other such protective apparel for sport, which are included under Recreational Goods and Other Miscellaneous Goods); shoelaces; parts of footwear, such as heels, soles, etc., purchased by households with the intention of repairing footwear themselves; and repair and hire of footwear. Hosiery and babies' booties made of fabric are excluded (included under Clothing).

Clothing

All consumer expenditure on garments for men, women, children (3 to 13 years) and infants (0 to 2 years), either ready-to-wear or made-to-measure, in all materials (including leather, furs, plastics and rubber), for everyday wear, for sport or for work. Includes hosiery (excluding medical hosiery, which is included under Chemists' Goods) and underwear; ties, handkerchiefs, scarves, squares, gloves (including gardening gloves and working gloves, but excluding rubber gloves, which are included under Non-Durable Household Goods), mittens, muffs, belts, braces, aprons, smocks, bibs, sleeve protectors, hats, caps, berets, bonnets, etc.; clothing materials, knitting yarns, sewing threads and dressmaking notions (buckles, ribbons etc.). Also includes cleaning, repair and hire of clothing. Does not include protective gear for sports (see Recreational Goods and Other Miscellaneous Goods), but does include cycle and motorcycle helmets. All babies' nappies (included under Chemists' Goods) are also excluded.

Furniture, Floor Coverings and Household Textiles

Furniture and Floor Coverings

All consumer retail expenditure on beds, sofas, couches, tables, chairs, cupboards, chests of drawers and bookshelves; baby furniture such as cradles, high chairs and playpens (but excluding carrycots, pushchairs etc. which are included under Recreational Goods and Other Miscellaneous Goods); base mattresses and mattresses (but not futons, which are included under Household Textiles and Soft Furnishings); pictures, sculptures, engravings, tapestries and other art objects including reproductions of works of art and other ornaments (but excluding works of art and antique furniture acquired primarily as stores of value); lighting equipment such as ceiling lights, standard lamps, globe lights and bedside lamps; screens, folding partitions and other furniture and fixtures; bathroom cabinets; blinds (non-fabric); camping and garden furniture; mirrors, candle holders and candlesticks; loose carpets, fitted carpets, linoleum and other such floor coverings (but excluding bathroom mats, rush mats and doormats, which are included under Household Textiles and Soft Furnishings, and antique floor coverings acquired primarily as stores of value). Includes the delivery and installation of furniture and fixture when applicable, and the laying of floor coverings.

Household Textiles and Soft Furnishings

All consumer retail expenditure on bed linen such as sheets, pillowcases, blankets, travelling rugs, plaids, eiderdowns, counterpanes and mosquito nets (but excluding electric blankets, which are included under Domestic Appliances); bedding such as futons, pillows, bolsters and hammocks (but excluding mattresses, which are included under Furniture and Floor Coverings; air mattresses and sleeping bags, which are included under Recreational Goods and Other Miscellaneous Goods); furnishing fabrics, curtain material, curtains, double curtains, awnings, door curtains and fabric blinds; table linen and bathroom linen such as tablecloths, table napkins, towels and face cloths; other household textiles such as shopping bags, laundry bags, shoe bags, covers for clothes and furniture, flags, sunshades, etc.; cloth bought by the piece (but excluding Clothing materials, which are included under Clothing); oilcloth; bathroom mats, rush mats and doormats; and the repair of the

Detailed Category Definitions

above articles. Fabric wall coverings (see DIY and Decorators' Supplies) and tapestries (see Furniture and Floor Coverings) are excluded.

Audio-Visual Equipment and Other Durable Goods

Domestic Appliances

All consumer retail expenditure on domestic electrical and gas appliances, such as washing machines, dryers, drying cabinets, dishwashers, ironing and pressing machines; cookers, spit roasters, hobs, ranges, ovens and microwave ovens; refrigerators, freezers and fridge-freezers; vacuum cleaners, steam-cleaning machines, carpet shampooing machines and machines for scrubbing, waxing and polishing floors; other major household appliances such as safes, sewing machines, knitting machines, water softeners, etc.; air-conditioners, humidifiers, space heaters, water heaters, ventilators and extractor hoods; coffee mills, coffee-makers, juice extractors, can-openers, food mixers, deep fryers, meat grills, knives, toasters, ice cream makers, sorbet makers, yoghurt makers, hotplates, irons, kettles, fans, electric blankets, etc. includes delivery and installation of the appliances when applicable. Audio-visual equipment (see Audio-Visual Equipment, Photographic and Optical Goods); non-electric household scales (see China, Glass and Utensils); non-electric personal weighing machines and baby scales (see Chemists' Goods); and power tools and lawnmowers (see China, Glass and Utensils) are excluded, as are appliances that are built into the structure of the building.

Audio-Visual Equipment, Photographic and Optical Goods

All consumer retail expenditure on radio sets, car radios, radio clocks, two-way radios, amateur radio receivers and transmitters; television sets, video cassette players and recorders, television aerials of all types; gramophones, tape players and recorders, cassette players and recorders, CD-players, personal stereos, stereo systems and their constituent units (turntables, tuners, amplifiers, speakers, etc.), microphones and earphones; personal computers, visual display units, printers and miscellaneous accessories accompanying them; computer software packages such as operating systems, applications, languages, etc.; telefax and telephone-answering facilities provided by personal computers; calculators, including pocket calculators; typewriters and word processors; still cameras, movie cameras and sound-recording cameras, video cameras and camcorders, film and slide projectors, enlargers and film processing equipment, accessories (screens, viewers, lenses, flash attachments, filters, exposure meters, etc.); binoculars, microscopes, telescopes and compasses. Also includes pre-recorded and blank media such as records and compact discs; pre-recorded and unrecorded tapes, cassettes, video cassettes, diskettes and CD-ROMs for tape recorders, cassette recorders, video recorders and personal computers; unexposed films (including processing costs where included), cartridges and disks for photographic and cinematographic use; and photographic supplies such as paper and flashbulbs. Excludes video game software, video game cassettes and video game CD-ROMs, video game computers that plug into a television set, typewriter ribbons, toner and ink cartridges, slide rules, non-prescription sunglasses, and musical instruments (see Recreational Goods and Other Miscellaneous Goods); prescription and non-prescription spectacles, and contact lenses (see Chemists' Goods); batteries (see China, Glass and Utensils); and development of films and printing of photographs where not included in the price of the film.

Telephone and Fax Equipment

All consumer retail expenditure on telephones, radiotelephones, telefax machines, telephone-answering machines and telephone loudspeakers; and the repair of such equipment. Telefax and telephone-answering facilities provided by personal computers (see Audio-Visual Equipment, Photographic and Optical Goods) are excluded.

Hardware and DIY Supplies

Detailed Category Definitions

China, Glass and Utensils

All consumer retail expenditure on glassware, crystal ware, ceramic ware and chinaware of the kind used for table, kitchen, bathroom, toilet, office and indoor decoration; cutlery, flatware and silverware; non-electric kitchen utensils of all materials such as saucepans, stew pots and pressure cookers, frying pans, coffee mills, puree makers, mincers, hotplates, household scales and other such mechanical devices; non-electric household articles of all materials such as containers for bread, coffee, spices etc., waste bins, waste paper baskets, laundry baskets, portable money boxes and strong boxes, towel rails, bottle racks, irons and ironing boards, letter boxes, feeding bottles, thermos flasks and ice boxes.

DIY and Decorators' Supplies

All consumer retail expenditure on products such and materials such as renderings, wallpapers, fabric wall coverings, plaster, cement, putty, wallpaper pastes etc., purchased for minor maintenance and repair of the dwelling; small plumbing items (pipes, taps, joints etc.); window panes; paint and varnishes; surfacing material (floorboards, ceramic tiles, etc.); and brushes and scrapers for paint, varnish and wallpaper. Excludes hand tools, door fittings, power sockets, wiring flex and lamp bulbs (see Tools and Equipment for House and Garden); lighting equipment such as ceiling lights, standard lamps, globe lights and bedside lamps (see Furniture and Floor Coverings); and products, materials and fixtures used for major maintenance and repair or for extension and conversion of the dwelling.

NOTE: From June 2013 maintenance and repairs expenditure in owner-occupied dwellings is included in imputed rentals category; more information on this is available from the link below:

<http://www.ons.gov.uk/ons/rel/consumer-trends/consumer-trends/q1-2013/blue-book-2013--improvements-to-household-expenditure-estimates.htm#tab=Improvements-to-sources-and-methods>

Tools and Equipment for House and Garden

All consumer retail expenditure on motorized tools and equipment such as electric drills, saws, sanders and hedge cutters, garden tractors, lawnmowers, cultivators, chainsaws and water pumps; garden tools such as wheelbarrows, watering cans, hoses, spades, shovels, rakes, forks, scythes, sickles and secateurs; hand tools such as saws, hammers, screwdrivers, wrenches, spanners, pliers, trimming knives, rasps and files; ladders and steps; charges for leasing or rental of DIY machinery and equipment; door fittings (hinges, handles and locks), fittings for radiators and fireplaces, other metal articles for the house (curtain rails, carpet rods, hooks etc) or for the garden (chains, grids, stakes and hoop segments for fencing and bordering); small electrical accessories such as power sockets, switches, wiring flex, electric bulbs, fluorescent lighting tubes, torches, flashlights, hand lamps, electric batteries for general use, bells and alarms.

Gardens, Plants and Flowers

All consumer retail expenditure on natural or artificial flowers and foliage, plants, shrubs, bulbs, tubers, seeds, fertilizers, composts, garden peat, turf for lawns, specially treated soils for ornamental gardens, horticultural preparations, pots and pot holders (but excluding garden tools and equipment, which are included under Tools and Equipment for House and Garden, gardening gloves, which are included under Clothing, and garden furniture, which is included under Furniture and Floor Coverings), natural and artificial Christmas trees; delivery charges for flowers and plants.

Other Goods

Chemists' Goods

All consumer retail expenditure on prescription and non-prescription medicinal preparations, medicinal drugs, patent medicines, serums and vaccines, vitamins and minerals, cod liver oil and halibut liver oil, oral contraceptives; clinical thermometers, adhesive and non-adhesive bandages, hypodermic syringes, first-aid kits, hot-water bottles and ice bags, medical hosiery items such as

Detailed Category Definitions

elasticated stockings and knee supports, pregnancy tests, condoms and other non-oral contraceptive devices; corrective eyeglasses and contact lenses, hearing aids, glass eyes, artificial limbs and other prosthetic devices, orthopaedic braces and supports, orthopaedic footwear, surgical belts, trusses and supports, neck braces, medical massage equipment and health lamps, powered and unpowered wheelchairs and invalid carriages, "special" beds, crutches, electronic and other devices for monitoring blood pressure, etc., dentures (excluding fitting costs), and the repair of such articles; electric razors and hair trimmers, hand-held and hood hairdryers, curling tongs and styling combs, sunlamps, vibrators, electric toothbrushes and other electric appliances for dental hygiene, etc., and the repair of such articles; non-electric appliances: razors and hair trimmers and blades therefore, scissors, nail files, combs, shaving brushes, hairbrushes, toothbrushes, nail brushes, hairpins, curlers, personal weighing machines, baby scales, etc.; articles for personal hygiene: toilet soap, medicinal soap, cleansing oil and milk, shaving soap, shaving cream and foam, toothpaste, etc.; toilet paper, paper handkerchiefs, paper towels, sanitary towels, cotton wool, cotton tops, babies' napkins (nappies), toilet sponges, etc.; beauty products such as lipstick, nail varnish, make-up and make-up removal products (including powder compacts, brushes and powder puffs), hair lacquers and lotions, pre-shave and after-shave products, sunbathing products, hair removers, perfumes and toilet waters, personal deodorants, bath products, etc. Excludes protective goggles, belts and supports for sport, and sunglasses not fitted with corrective lenses (see Recreational Goods and Other Miscellaneous Goods); handkerchiefs made of fabric (see Clothing); and the hire of therapeutic equipment.

Jewellery, Silverware, Watches and Clocks

All consumer retail expenditure on precious stones and metals and jewellery fashioned out of such stones and metals; costume jewellery, cuff links and tiepins; clocks, watches, stopwatches, alarm clocks, travel clocks; and the repair of such articles. Excludes silverware (see China, Glass and Utensils); radio clocks (see Audio-Visual Equipment, Photographic and Optical Goods); wall thermometers and barometers (see Recreational Goods and Other Miscellaneous Goods); and precious stones and metals and jewellery fashioned out of such stones and metals acquired primarily as stores of value.

Non-Durable Household Goods

All consumer retail expenditure on cleaning and maintenance products such as soaps, washing powders, washing liquids, scouring powders, detergents, disinfectant bleaches, softeners, conditioners, window-cleaning products, waxes, polishes, dyes, unblocking agents, disinfectants, insecticides, pesticides, fungicides and distilled water; articles for cleaning such as brooms, scrubbing brushes, dustpans and dust brushes, dusters, tea towels, floor cloths, household sponges, scourers, steel wool and chamois leathers; paper products such as filters, tablecloths and table napkins, kitchen paper, vacuum cleaner bags and cardboard tableware, including aluminium foil and plastic bin liners; other non-durable household articles such as matches, candles, lamp wicks, methylated spirits, clothes-pegs, clothes hangers, pins, safety pins, sewing needles, knitting needles, thimbles, nails, screws, nuts and bolts, tacks, washers, glues and adhesive tapes for household use, string, twine and rubber gloves; polishes, creams and other shoe-cleaning articles; and fire extinguishers for households. Excludes brushes and scrapers for paint, varnish and wallpaper (see DIY and Decorators' Supplies); horticultural products for the upkeep of ornamental gardens (see Recreational Goods and Other Miscellaneous Goods); paper handkerchiefs, toilet paper, toilet soaps, toilet sponges and other products for personal hygiene (see Chemists' Goods); and cigarette, cigar and pipe lighters and lighter fuel (see Recreational Goods and Other Miscellaneous Goods).

Bicycles

All consumer retail expenditure on bicycles and tricycles of all types, including rickshaws. Excludes toy bicycles and tricycles (see Recreational Goods and Other Miscellaneous Goods) and cycle helmets and clothing (see Clothing).

Detailed Category Definitions

Recreational Goods

All consumer retail expenditure on musical instruments of all sizes, including electronic musical instruments, such as pianos, organs, violins, guitars, drums, trumpets, clarinets, flutes, recorders, harmonicas, etc.; billiard tables, ping-pong tables, pinball machines, gaming machines, etc.; gymnastic, physical education and sport equipment such as balls, shuttlecocks, nets, rackets, bats, skis, golf clubs, foils, sabres, poles, weights, discuses, javelins, dumb-bells, chest expanders and other body-building equipment; parachutes and other sky-diving equipment; firearms and ammunition for hunting, sport and personal protection; fishing rods and other equipment for fishing; equipment for beach and open-air games, such as bowls, croquet, frisbee, volleyball, and inflatable boats, rafts and swimming pools; camping equipment such as tents and accessories, sleeping bags, backpacks, air mattresses and inflating pumps, camping stoves and barbecues; repair of sports goods and camping equipment; toys of all kinds including dolls, soft toys, toy cars and trains, toy bicycles and tricycles, toy construction sets, puzzles, plasticine, electronic games, masks, disguises, jokes, novelties, fireworks and rockets, festoons and Christmas tree decorations; card games, parlour games, chess sets and the like; stamp-collecting requisites (used or cancelled postage stamps, stamp albums, etc., but excluding unused postage stamps), other items for collections (coins, medals, minerals, zoological and botanical specimens, etc., but excluding collectors' items falling into the category of works of art or antiques, which are included under Furniture and Floor Coverings), and other tools and articles not elsewhere classified for hobbies; video-game software, video-game cassettes and video-game CD-ROMs; video-game computers that plug into a television set; pets (excluding horses and ponies), pet foods, veterinary and grooming products for pets (excluding veterinary services), collars, leashes, kennels, birdcages, fish tanks and cat litter, etc.

Other Miscellaneous Goods

Writing pads, envelopes, account books, notebooks, diaries, etc.; pens, pencils, fountain pens, ballpoint pens, felt-tip pens, inks, erasers, pencil sharpeners, etc.; stencils, carbon paper, typewriter ribbons, inking pads, correcting fluids, etc.; paper punches, paper cutters, paper scissors, office glues and adhesives, staplers and staples, paper clips, drawing pins, etc.; drawing and painting materials such as canvas, paper, card, paints, crayons, pastels and brushes; toner and ink cartridges; educational materials such as exercise books, slide rules, geometry instruments, slates, chalks and pencil boxes (but excluding children's scrapbooks, which are included under Books); posters, plain or picture postcards (but excluding pre-franked postcards and aerogrammes), calendars; catalogues and advertising material; greeting cards and visiting cards, announcement and message cards; maps and globes; travel goods and other carriers of personal effects: suitcases, trunks, travel bags, attaché cases, satchels, hand-bags, wallets, purses, etc.; articles for babies such as baby carriages, pushchairs, carrycots, recliners, car beds and seats, back-carriers, front carriers, reins and harnesses, etc. (but excluding baby clothing, which is included under Clothing, baby furniture, which is included under Furniture and Floor Coverings, feeding bottles, which are included under China, Glass and Utensils, and nappies, which are included under Chemists' Goods); articles for smokers such as pipes, lighters, cigarette cases, cigar cutters, ashtrays, etc.; miscellaneous personal articles such as non-prescription sunglasses, walking sticks and canes, umbrellas and parasols, fans, keyrings, etc.; funerary articles such as coffins, gravestones, urns, etc.; lighter fuel; wall thermometers and barometers; and the repair of personal effects.

Bulky Goods

The bulky goods category is made up of Furniture and floor coverings (not the larger "furniture, floor coverings and household textiles" group) and Domestic appliances.

Total DIY Related Goods

This provides a total figure for all DIY related spend, including repair and maintenance materials; tools and equipment for house and garden; gardens, plants and flowers; 4.2% of cleaning materials; 15% of furniture and floor coverings.

Time Series Estimates

Section 3 of this "Retail Guide" quotes estimates of past and projected future growth rates of retail spending. The data used in the estimation of these trends have been calculated using a method known as chain linking. This means that rather than adding up a number of consumer spending categories measured in a recent year's prices in order to arrive at retail expenditure, allowance is made for the fact that relative prices can change substantially over time and that the relative prices of, say 2010, might not be particularly meaningful when aggregating data from the 1960s. A further advantage of chain-linked data is that they are less prone to revision when price bases are changed.

Chain linking combines constant price growth rates measures in different years' prices. It is now the system used for all National Accounts estimates and it is the appropriate method for calculating retail expenditure growth rates. The time series data supplied here uses the current Office for National Statistics convention of chain linking the data to 2010 and then reverting to simple additive estimates after 2010.

Using chain-linked estimates actually increases estimates of historical growth rates for comparison goods. Note, however, that although this will affect estimated historical trends, the Oxford Economics forecasts (as opposed to the trend-based projections) take into account the impact of the recession and tightened government policy which will both contribute to a period of restrained spending growth.

Chain linked estimates have been produced at the comparison and convenience goods levels. The series for "All Retail Goods" quoted is the sum of the chain-linked series for comparison and convenience. Note that chain linking only affects the constant price estimates used in trend analysis and it does not affect the current price expenditure estimates.

Leisure Goods and Services Expenditure

Consumer expenditure for the following leisure categories is available from the Pitney Bowes Leisure Goods and Service Expenditure Database:

Leisure Goods and Services Expenditure

Pitney Bowes Software Leisure Category	Consumer Trends COICOP Categories
Audio-visual, photo and optical	9.1.1 Audio visual equipment 9.1.2 Photographic and optical equipment 9.1.3 Information processing equipment 9.1.4 Recording media
Gardens, flowers and plants	9.3.3 Gardens, plants and flowers
Recreational goods	Sum of 9.2.1, 9.2.2, 9.3.1, 9.3.2 and 9.3.4 (see below)
Major and minor durables for indoor and outdoor recreation	9.2.1 Major durables for outdoors recreation 9.2.2 Musical instruments and major durables for indoor recreation
Games, toys and hobbies	9.3.1 Games, toys and hobbies
Sports, camping and open-air recreational equipment	9.3.2 Sports, camping and open air recreation equipment
Pets and related products	9.3.4 Pets and related products
Books	9.5.1 Books
Recreational and cultural services	9.4.1 Recreational and sporting services 9.4.2 Cultural services 9.4.3 Games of chance
Restaurants, cafes and canteens	11.1.1 Restaurants and cafes 11.1.2 Canteens
Accommodation services	11.2 Accommodation Services
Hairdressing and personal grooming	12.1.1 Hairdressing and personal grooming

Detailed Category Definitions

Recreational and Cultural Services

Services provided by sports stadia, racecourses, rinks, golf courses, pools, courts, bowling alleys, gyms, fairs, parks, dancing and skating; cinemas, theatres, concerts, circuses, TV licences, TV rental, satellite subscription, video hire, hire of musicians, clowns, performers, photographers, film processing; lotteries, scratch cards, betting, gaming, gambling.

Restaurants, Cafes and Canteens

Catering services, meals, alcohol, snacks and drinks sold by restaurants, pubs, cafes, etc.; catering services of works canteens, office restaurants, school and educational establishment canteens.

Accommodation Services

Accommodation in hotels, motels, inns, "bed and breakfast" establishments, caravan sites, youth hostels, boarding schools, universities and other educational establishment accommodation.

Hairdressing and Personal Grooming

Hairdressing salons, barbers, beauty shops, manicures, pedicures, Turkish baths, saunas, solariums, non-medical massages, etc. Excludes spas and fitness centres.

Other Expenditure Categories

Total Leisure Services

Total expenditure for recreational and cultural services; restaurants, cafes and canteens; accommodation services; hairdressing and personal grooming.

Total Leisure Goods

Total expenditure for audio-visual, photo and optical; gardens, flowers and plants; major and minor durables for indoor and outdoor recreation; games, toys and hobbies; sports, camping and open-air recreations; pets and related products; books [see the previous section for detailed definitions]

Other Expenditure Categories

Consumer expenditure for the following categories is also available:

Pitney Bowes Software Other Expenditure Category	Consumer Trends COICOP Categories
Actual rents	04.1 Actual rentals for housing
Owner-occupier rents	04.2 Imputed rentals for housing
Electricity, gas and other fuels	04.5 Electricity, gas and other fuels
Housing R&M services	04.3.2 Services for the maintenance and repair of the dwelling
Domestic and household services	05.6.2 Domestic services and household services
Vehicle fuels and lubricants	07.2.2 Fuels and lubricants for personal transport equipment
Transport services	07.3 Transport services
Telephone and telefax services	08.3 Telephone and telefax services
Education	10. Education
Insurance	12.5 Insurance
Financial services	12.6 Financial services n.e.c.

Detailed Category Definitions

Actual Rents

Rentals actually paid by tenants or subtenants occupying unfurnished or furnished premises as their main residence; payments by households occupying a room in a hotel or boarding house as their main residence; rentals actually paid for secondary residences. Excludes accommodation services of educational establishments, hostels, holiday villages and holiday centres, and of retirement homes for elderly persons.

Owner-Occupier Rents

Imputed rentals of owners occupying their main and secondary residences; imputed rentals of households paying a reduced rental or housed free. In the national accounts, owner-occupiers are deemed unincorporated businesses producing housing services, which they then consume. This consumption is therefore a component of household final consumption expenditure. The principle involved is to impute a rental value for an owner-occupied property, which is the same as the rental that would be paid for a similar property in the private rented sector.

Other Expenditure Categories

The main reason for this imputation treatment is to minimise distortions to the consumption figures which would otherwise arise when there were changes in housing tenure, for example from rented to owner-occupied. Such distortions can exist between different countries, but also over time within a single country. This treatment requires the imputing of a rental payment to the owner-occupied sector, analogous to the activity of payment of market or public sector rentals. For imputed rentals separate estimates, using similar methodology to paid rental, are made both for owner-occupiers and those living rent-free.

Utilities

Electricity; town gas and natural gas, liquefied hydrocarbons (butane, propane, etc.); domestic heating and lighting oils; coal, coke, briquettes, firewood, charcoal, peat and the like; hot water and steam purchased from district heating plants; associated expenditure such as hire of meters, reading of meters, standing charges, etc.

Housing R&M Services

Services of plumbers, electricians, carpenters, glaziers, painters, decorators, floor polishers, etc. engaged for minor maintenance and repair of the dwelling (both the cost of labour and the cost of materials are covered). Excludes separate purchases of materials made by households with the intention of undertaking the maintenance or repair themselves; services engaged for major maintenance and repair (intermediate consumption) or for extension and conversion of the dwelling (capital formation).

Domestic and Household Services

Domestic services supplied by paid staff employed in private service such as butlers, cooks, maids, drivers, gardeners, governesses, secretaries, tutors and au pairs; similar services, including babysitting and housework, supplied by enterprises or self-employed persons; household services such as window cleaning, disinfecting, fumigation and pest extermination; dry-cleaning, laundering and dyeing of household linen, household textiles and carpets; hire of furniture, furnishings, carpets, household equipment and household linen.

Vehicle Fuels and Lubricants

Petrol and other fuels such as diesel, liquid petroleum gas, alcohol and two-stroke mixtures; lubricants, brake and transmission fluids, coolants and additives. Excludes charges for oil changes and greasing

Transport Services

Transport of individuals and groups of persons and luggage by train, tram, underground, bus, coach, taxi, hired car with driver, aeroplane, helicopter, ship, boat, ferry, hovercraft and hydrofoil; transport of private vehicles; funicular, cable-car and chairlift transport; removal and storage services; services of porters and left-luggage and luggage-forwarding offices; travel agents' commissions (if separately priced).

Telephone Services

Installation and subscription costs of personal telephone equipment; telephone calls from a private line or from a public line (public telephone box, post office cabin, etc.); telephone calls from hotels, cafés, restaurants and the like; telegraphy, telex and telefax services; information transmission services; Internet connection services; hire of telephones, telefax machines, telephone-answering machines and telephone loudspeakers; radio-telephony, radio-telegraphy and radio telex services.

Education

Pre-primary, primary, secondary, post-secondary, tertiary education; educational programmes which do not require any special prior instruction, in particular vocational training and cultural development. Excludes driving lessons; recreational training courses such as sport or bridge

Other Expenditure Categories

lessons given by independent teachers.

Insurance

Service charges for life assurance, death benefit assurance, education assurance, etc.; for insurance taken out against fire, theft, water damage, etc.; for private sickness and accident insurance; for insurance in respect of personal transport equipment; for travel insurance and luggage insurance; for other insurance such as civil liability for injury or damage to third parties or their property.

Financial Services

Financial intermediation services indirectly measured; actual charges for the financial services of banks, post offices, saving banks, money changers and similar financial institutions; fees and service charges of brokers, investment counsellors, tax consultants and the like; administrative charges of private pension funds and the like.

3

Chapter 3: Using the Retail Spending Estimates

In this chapter:

♦ Special Forms of Trading	26
♦ Sales Densities	32
♦ Recent Trends	33
♦ Longer-run Trends	33
♦ Oxford Economics' Forecasts	36
♦ Trend Projections	38
♦ Prices	44

Special Forms of Trading

Data Issues

Special forms of trading (also known as Non-Store Retail Sales) are sales that do not take place through traditional store-based outlets. This includes spending through outlets, such as the internet, mail order, party plan and vending machines, and other non-store activity such as market and roadside stalls. They are of interest in a retail-planning context because they can be viewed as taking spending away from conventional stores.

The rapid growth in the internet in recent years has increased interest in the market share of non-store retail sales and the potential impact on high streets and shopping centres. Alongside this, however, there has been considerable confusion over the interpretation of the available data and uncertainty over the exact impact of the rise of the internet on conventional stores. Some of the main issues are summarised in the table below:

Issues with the Measurement and Interpretation of Special Forms of Trading

Measurement	Conceptual
<ul style="list-style-type: none"> ● The ONS produce two main series of interest: <ol style="list-style-type: none"> 1. Non-Store Retail Sales – which covers market stalls, door-to-door selling, the mail order and internet sales of wholly non-store operations 2. Internet Sales – which covers all internet sales including those already included in Non-Store Sales (e.g. Amazon) and internet sales by predominantly store-based operations (e.g. John Lewis, Tesco) ● Need to estimate a single “Broad” Non-Store Sales estimate 	<ul style="list-style-type: none"> ● Traditionally Non-Store Sales (or Special Forms of Trading) reduced the potential turnover available to retail outlets but... ● The advent of multi-channel retailing has clouded the issue ● Stores can be seen as showrooms or a source of stock for internet sales/internet can even direct customers to stores (e.g. use internet to research but buy in store) ● Smart phone technology blurs the boundaries further ● Catalogue-internet distinction has become increasingly meaningless

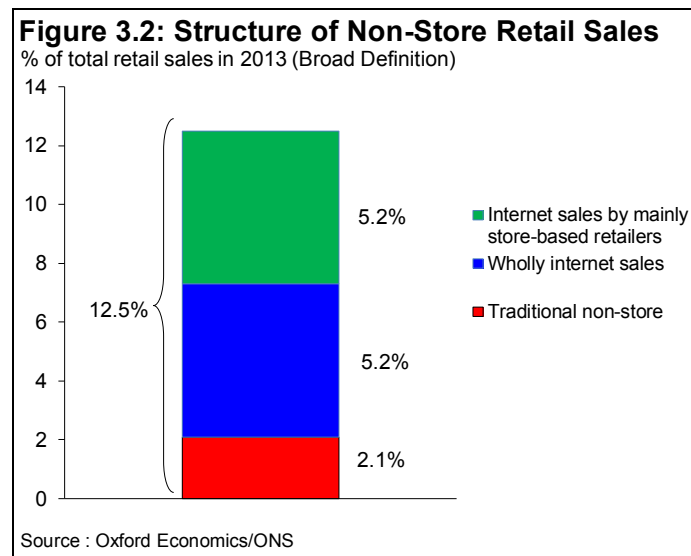
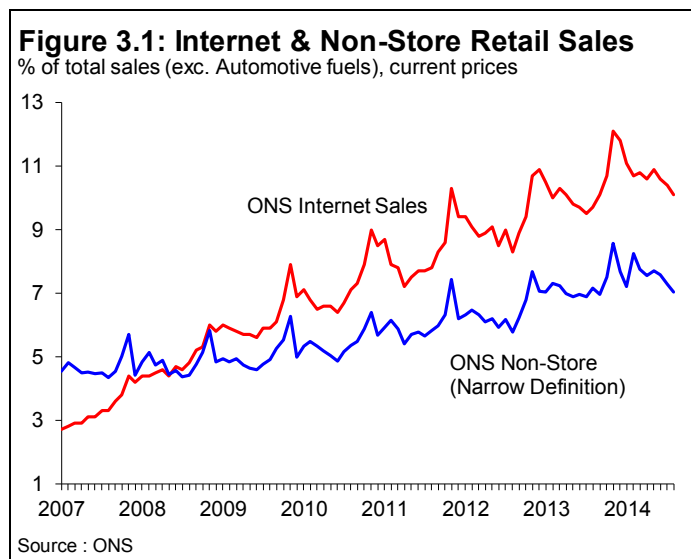
With regards to measurement, the main issue is that the ONS have, for some time, published a series called Non-Store Retail Sales but it is an incomplete measure of all non-store sales as the internet component only includes sales by “wholly internet-based” companies and not sales by companies that also operate conventional stores. Hence, the ONS series includes sales by companies such as Amazon, who operate solely over the internet, but not the internet sales of companies who also run conventional stores such as Tesco, John Lewis and practically every other major retailer. As a result, the ONS Non-Store Retail Sales figures severely under-estimate the impact of the growth of the internet. This is illustrated in Figure 3.1, which shows the share of total sales accounted for, by the ONS’s Non-Store series growing much slower than the ONS Internet Sales series (the ONS Non-Store Retail Sales share of the total increased from 4.7% in 2007 to 7.3% in 2013 - but it had been over 8% in the 1980s).

Due to the restricted coverage, we term the ONS series the “Narrow Definition” of Non-Store Retail Sales. The ONS also produce a series for Internet Sales, which is illustrated in Figure 3.1. This series shows a much more rapid increase in market share in recent years and is much more in line with anecdotal evidence on the growth of the internet and evidence from other surveys.

The statistical issue is that the ONS Internet Sales figures cannot be simply added to the ONS narrow definition of Non-Store Retail Sales as the two series overlap. The ONS Internet Sales

series includes the sales of both wholly internet based stores and the internet sales of companies who also operate conventional stores, while the sales of wholly internet based stores are also included in the ONS narrow definition of Non-Store Retail Sales.

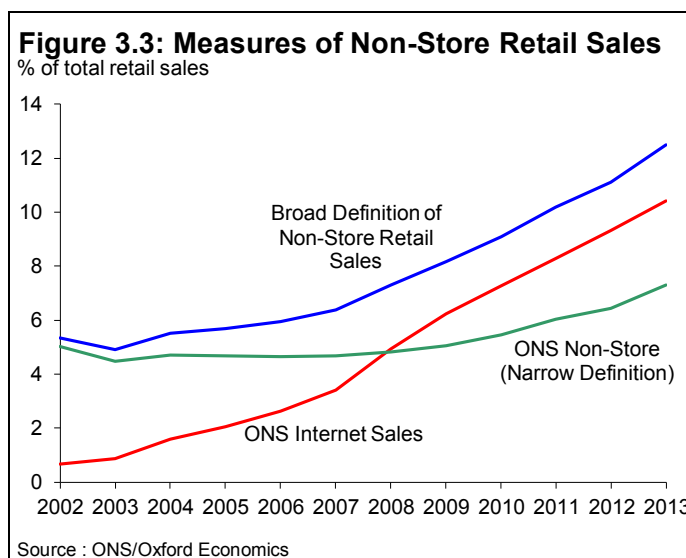
There are no official estimates of the extent of this overlap but a statistical modelling exercise carried out by Oxford Economics indicates that approximately 50% of all internet sales are already included in the ONS narrow definition of Non-Store Retail Sales. Based on this assumption, the "Broad Definition" of Non-Store Retail Sales in 2013 would be made up as illustrated in Figure 3.2.



The estimates shown in Figure 3.2 imply that traditional non-store retail sales through outlets such as mail order, door-to-door selling, market stalls and vending machines may have fallen to just 2.1% of total sales in 2013. It is important to note however that there is now a very blurred boundary between internet and mail order sales that makes comparisons with the past problematic.

Figure 3.3 shows our estimates of the evolution of the Broad Measure of Non-Store Retail sales since 2002. The Broad Measure's market share has increased more slowly than the ONS Internet Sales estimate because it contains the non-internet elements of non-store sales that have suffered from the growth of the internet. The ONS Internet Sales estimate increased its share of total sales

from 3.4% in 2007 to 10.4% in 2013 while the Oxford Economics Broad Measure of Non-Store Retail sales increased from 6.4% in 2007 to 12.5% in 2013. Both the ONS Internet Sales and the Oxford Economic Broad Measure of Non-Store Retail Sales have increased their share of total sales far more rapidly than the ONS narrow definition.



Breakdowns and Projections

The ONS narrow definition is broken down by type of good while the ONS Internet Sales series is broken down by type of shop. For example, the ONS Internet Sales breakdown shows that in 2013 15% of all internet spending has been in predominantly food stores, 37% in predominately non-food stores, while 48% was attributed to non-store retailing. Based on the available ONS data and additional data from Datamonitor (UK E-Retail 2011), we estimate that in 2013 the 12.5% market share of the Broad Measure of Non-Store Retail sales for all goods breaks down into a 6.5% market share for convenience goods and a 16.3% share for comparison goods.

Forecasting the future share is difficult. Internet sales penetration is already higher in the UK than in continental Europe and higher even than in the USA. This means that we have no clear indicator of a possible future saturation point. Recent increases have also been very rapid and it is difficult to see why they should suddenly level off when internet usage is still increasing and the use of smartphone technology in retailing is only just taking off. In the light of particularly strong growth in non-store share of comparison goods in 2013, we revised our "central" forecast in this edition of the report, which results in the non-store share for comparison goods reaching 23.5% by 2024. Nonetheless, the internet's market share is likely to level off at some point. Our forecast for convenience goods are more in line to the last edition, with its non-store share close to levelling off at 8.7% by 2024. One of the factors potentially limiting convenience internet growth is increasing market share of discount convenience retailers such as Lidl and Aldi, who currently only sell in-store.

Given the uncertainties involved, we have also prepared a "High Case" for the market share of the Broad Definition of Non-Store Retail Sales, which assumes a more gradual slowdown of the rate of increase of internet penetration. This has the share of comparison and convenience goods sales accounted for by the Broad Measure of Non-Store Retail sales reaching 26.9% and 9.9% respectively in 2024. The Central and High cases are illustrated in Figures 3.4 and 3.5 and in Table 3.1.

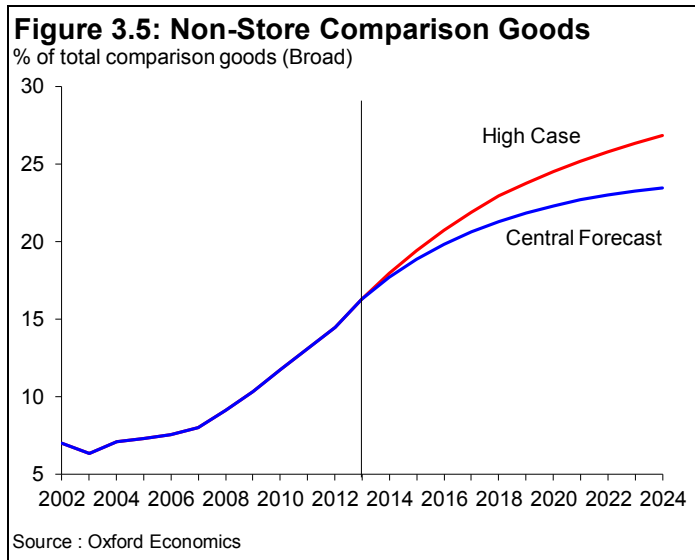
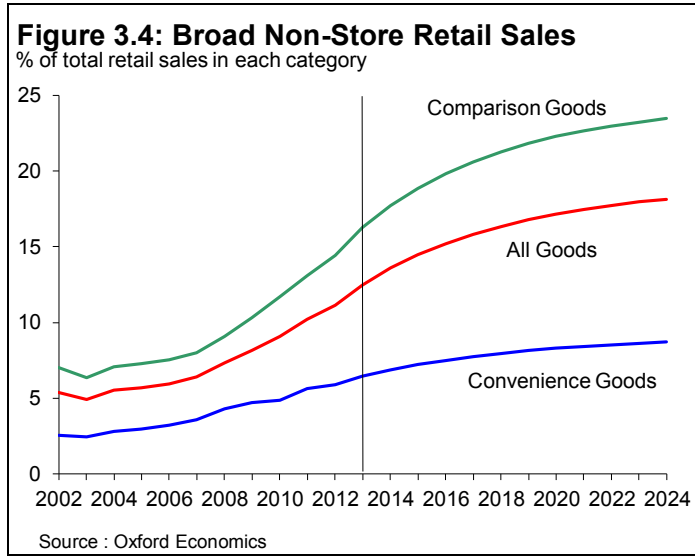


Table 3.1 also gives projections of the narrow definition of Non-Store Retail Sales. This is given for reference only and we would caution against using them as a lower-case alternative.

Table 3.1: Non-Store Retail Sales – Projected Market Share

Non-Store Retail Sales - Broad Definition						
Percentage of Total Spending						
	Central Case			High Case		
	Total	Convenience	Comparison	Total	Convenience	Comparison
2002	5.3	2.5	7.0	5.3	2.5	7.0
2003	4.9	2.4	6.3	4.9	2.4	6.3
2004	5.5	2.8	7.1	5.5	2.8	7.1
2005	5.7	3.0	7.3	5.7	3.0	7.3
2006	6.0	3.2	7.5	6.0	3.2	7.5
2007	6.4	3.6	8.0	6.4	3.6	8.0
2008	7.3	4.3	9.1	7.3	4.3	9.1
2009	8.2	4.7	10.3	8.2	4.7	10.3
2010	9.1	4.8	11.7	9.1	4.8	11.7
2011	10.2	5.6	13.1	10.2	5.6	13.1
2012	11.1	5.9	14.5	11.1	5.9	14.5
2013	12.5	6.5	16.3	12.5	6.5	16.3
2014	13.6	6.9	17.7	13.8	7.0	18.0
2015	14.5	7.2	18.9	14.9	7.4	19.4
2016	15.2	7.5	19.8	15.9	7.8	20.7
2017	15.8	7.7	20.6	16.8	8.2	21.9
2018	16.4	8.0	21.3	17.6	8.6	22.9
2019	16.8	8.1	21.8	18.3	8.8	23.8
2020	17.2	8.3	22.3	18.9	9.1	24.5
2021	17.5	8.4	22.7	19.4	9.3	25.2
2022	17.7	8.5	23.0	19.9	9.5	25.8
2023	18.0	8.6	23.3	20.3	9.7	26.3
2024	18.2	8.7	23.5	20.8	9.9	26.9

Non-Store Retail Sales - Narrow (ONS) Definition						
Percentage of Total Spending						
	Central Case			High Case		
	Total	Convenience	Comparison	Total	Convenience	Comparison
2002	5.0	2.2	6.6	5.0	2.2	6.6
2003	4.5	2.0	5.9	4.5	2.0	5.9
2004	4.7	2.1	6.2	4.7	2.1	6.2
2005	4.7	2.1	6.2	4.7	2.1	6.2
2006	4.6	2.1	6.1	4.6	2.1	6.1
2007	4.7	2.1	6.1	4.7	2.1	6.1
2008	4.8	2.1	6.4	4.8	2.1	6.4
2009	5.0	2.0	6.9	5.0	2.0	6.9
2010	5.5	1.7	7.8	5.5	1.7	7.8
2011	6.0	2.1	8.5	6.0	2.1	8.5
2012	6.5	2.0	9.3	6.5	2.0	9.3
2013	7.3	2.1	10.6	7.3	2.1	10.6
2014	8.2	2.1	11.9	8.3	2.1	12.1
2015	8.9	2.1	13.0	9.2	2.2	13.4
2016	9.5	2.1	14.0	10.0	2.2	14.6
2017	10.0	2.2	14.7	10.6	2.3	15.6
2018	10.5	2.2	15.3	11.3	2.3	16.5
2019	10.8	2.2	15.8	11.8	2.4	17.2
2020	11.1	2.2	16.2	12.2	2.5	17.8
2021	11.3	2.3	16.6	12.6	2.5	18.4
2022	11.6	2.3	16.8	12.9	2.6	18.9
2023	11.7	2.3	17.0	13.3	2.6	19.3
2024	11.9	2.3	17.2	13.6	2.7	19.7

Conceptual Issues

As mentioned earlier, the advent of the internet has raised conceptual as well as measurement issues relating to the way that Non-Store Retail sales are treated in a retail-planning context. One element of this is how to treat sales that are made online but where the goods are either taken by store-staff from the shelves of company stores (as with Tesco) or where they are picked up from the store (as with a number of large retailers). Tesco's (who source most of their online convenience goods sales from existing stores) online sales in the UK in 2013 are estimated to be around £3.3bn, so it is quite possible that the majority of the estimated £5.8bn difference between the Broad and Narrow estimates of Non-Store sales of convenience goods in 2013 was sourced from the shelves of existing stores.

Table 3.2 Non-Store Convenience goods – Adjusted Market Share

	Non-Stores Sales of Convenience Goods (% of Total Spending on Convenience Goods)			
	Total	Adjusted*	of which:	
			Narrow Definition	Part of Non- Narrow Definition
2002	2.5	2.3	2.2	0.0
2003	2.4	2.1	2.0	0.0
2004	2.8	2.2	2.1	0.1
2005	3.0	2.2	2.1	0.1
2006	3.2	2.2	2.1	0.1
2007	3.6	2.3	2.1	0.1
2008	4.3	2.4	2.1	0.2
2009	4.7	2.3	2.0	0.3
2010	4.8	2.0	1.7	0.3
2011	5.6	2.5	2.1	0.3
2012	5.9	2.4	2.0	0.4
2013	6.5	2.5	2.1	0.4
2014	6.9	2.6	2.1	0.5
2015	7.2	2.6	2.1	0.5
2016	7.5	2.7	2.1	0.5
2017	7.7	2.7	2.2	0.6
2018	8.0	2.8	2.2	0.6
2019	8.1	2.8	2.2	0.6
2020	8.3	2.8	2.2	0.6
2021	8.4	2.9	2.3	0.6
2022	8.5	2.9	2.3	0.6
2023	8.6	2.9	2.3	0.6
2024	8.7	3.0	2.3	0.6

Table 3.2 shows the impact of assuming that 90% of internet sales by companies who also have a conventional store-based presence (e.g. Tesco) are sourced from existing stores, or are made via Click & Collect. This has a big impact on the implied reduction in spending to allow for Special Forms of Trading/Non Store Retail Sales. This falls from 6.5% in the Broad Definition to just 3% in the adjusted version with only a modest increase after 2013. The 90% assumption may not, of course, hold in the future. Tesco are already sourcing some orders from “dark” stores (i.e. warehouses existing purely to serve the online market), and plan to launch around 50 non-store collection points in 2014/15.

A more difficult conceptual issue is how to deal with multichannel retailing. In some retail business models, stores can be seen as showrooms for internet sales rather than as sales points in their own right. The increased use of smart phone technology has started to blur the store/internet

boundary even further. Customers can now visit a few different stores, choose the best product and later place an order using their smart phone. There are obviously viability and sustainability issues if a company starts to simply act as a showroom for other companies' sales, but the increasing popularity of the multi-channel model implies that the phenomena is likely to be around for some time to come.

The implication is that the "retail needs model" whereby the potential spending in-stores in a location relative to sales densities is an indicator of the need for retail space may no longer be appropriate. Another way of looking at this is to say that it is not appropriate to deduct the full extent of estimated non-store sales from local spending when estimating spending available for local store-based sales; although it is difficult, if not impossible, to say what share is appropriate.

Sales Densities

Sales densities are the value or volume of retail goods sold through retail outlets divided by the available floor space. By implication, any increase in sales densities reduces the future need for retail floor space all else being equal.

Measurement of changes in sales densities is problematic due to data constraints but it is clear that in the pre-recession years rapid growth of retail expenditure far outstripped the increase in available floor space, leading to rapid growth in sales densities. Blake, Morley and Bach (Future of Retail Property: How Much Space, BCSC 2008) attempted to estimate sales density changes between 1987 and 2005 for convenience and comparison goods and to spell out the relationships between gross and net space and the impact of the changing age and in-town/out-of-town mix of retail space. The results show an exceptionally rapid growth in (net) sales densities between 2000 and 2005 of 1.6% and 3.9% per year for convenience and comparison goods respectively, which represented a substantial acceleration on the 1.2% and 2.5% per year increases recorded between 1987 and 2000.

The authors, however, argue that it would be incorrect to extrapolate recent trends into the future as they were very much driven by the consumer-spending boom and were unlikely to be either sustainable or desirable in the long run. Instead, they base their future assumptions on the growth rates in the earlier, 1987-2000, period. These were further adjusted down to allow for the increase in convenience densities that was due to the replacement of old space with new space with higher sales densities and for the impact of Sunday trading which was also thought of as a one-off event. The final assumptions used for future sales density growth were 0.6% and 2.2% per year for convenience and comparison goods respectively.

These assumptions were then used in calculations of future retail space needs at the England and Wales level. There are a number of reasons why they might be an over-estimate if used in local needs assessments:

Only part of the potential one-off 0.7% per year impact of the introduction of Sunday Trading on 1987-2000 growth rates was deducted, partly because not all of the increase in Sunday Trading happened between 1999 and 2000 and partly because there was still scope for a further increase in Sunday trading (and 24 hour trading). The likelihood of further increases in the share of sales taking place on a Sunday cannot be taken for granted and there may be scope for a further downwards adjustment to the projected growth rates.

Much of the increase in convenience sales densities was attributed to a "weighting effect" caused when new space replaced old. This was not found for comparison space but this could easily have been due to data limitations. This is crucial, as weighting effects can only take place if new space is built and national aggregates that potentially include weighting effects should not be built in to local studies. Consequently aggregate growth rates may not be appropriate for every part of the country.

Note also that sales densities are much higher in the UK than in continental Europe and far higher than in the USA. This may mean that there is less scope for further increases. There are also arguments that all of the observed increases in sales densities in the past were either one-offs that

Recent Trends

are unlikely to be repeated (Sunday trading, increased efficiency), of only minor significance (the shift to higher value items) or not relevant to the locality being considered (the large scale replacement of old store formats with new). We are left, however, with the fact that available data does show considerable increases in the past that cannot all be explained by one-off factors and it looks unlikely that there will be no future increases in sales densities.

Reliable data on sales density is hard to come by, largely because of the current availability of floor space data. The Valuation Office Agency (VOA) does publish data on floor space, however this data is only available for England and Wales, it includes some non-retail goods premises (such as restaurants, hairdressers and financial/professional services), there are a number of series breaks, and most importantly there is no breakdown by convenience/comparison shop type. At the same time the question remains whether Non-Store Retail Sales should be excluded from the calculation of sales densities, as mentioned in the previous sub-section. Therefore numerous assumptions have to be made when calculating sales densities. Using the Experimental Business Floor space statistics released by the VOA in 2012, approximate calculations by Oxford Economics show that in the last few years growth in total sales density in England and Wales has been below that of the early-2000s, and relatively close to the original growth predicted by Blake et al (2008). Looking ahead, as the share of internet spending rises it is likely that growth of the 'traditional' measure of sales densities (i.e. one excluding non-store sales) will slow further.

If we assume that Sunday trading is now close to its peak, the Blake et al (2008) projections can be revised down to give projected sales density increases of 0.4% for convenience goods space and to 1.8% for comparison goods space. Furthermore, as the aggregate figures are heavily dependent on the rapid growth in sales volumes of audio-visual equipment including personal computers and mobile phones, it is possible to justify a lower rate of increase for comparison sales densities in areas with a below average share of stores selling these items.

Recent Trends

After falling by 0.4% in 2012, real per capital spending on convenience goods fell further in 2013, by 0.5%. This makes it the eighth consecutive year of contractions, the sharpest fall being in 2009. As a result, in 2013 per capital spending on convenience goods (in volume terms) was 13% below its peak of 2005.

In contrast to convenience goods, spending on comparison goods has held up relatively well during the last five years. Having fallen by 1.6% in 2009 as the UK economy contracted, it has recovered well since then and by 2013 was 10% above the 2009 level. The most recent recorded growth of 5% in 2013 was particularly impressive, and this momentum looks to have carried over into the first quarter of 2014.

From looking at these two recent trends it becomes evident that during the recession and the following period of stagnant income growth, on average people chose to cut back on convenience goods (i.e. the essentials such as food) and at the same time continued to increase their spending on comparison goods (i.e. luxuries such as electronics). This is partly explained by the fact the prices of convenience goods have been increasing while those of comparison goods remained flat, so by consuming fewer convenience goods some people had more money available to spend on comparison goods. In microeconomics this is known as the substitution effect.

Longer-run Trends

From as early as 1964 comparison goods have accounted for an increasing share of household spending. As household incomes rose, spending on comparison goods grew much faster than spending on convenience goods. The compound annual growth rate (CAGR) for per capita comparison goods spending over the period 1993-13 was 5.7% per year, compared to just 0.1%

Longer-run Trends

per year for convenience goods (see Table 3.4). Having experienced some very rapid growth in the earlier part of the 2000s, the 2009-11 slowdown has dragged the average growth rates of comparison goods down somewhat. Over the period of 1964-2013 the average rate of increase of spending per capita on comparison goods was 4.4% per year (see Table 3.4). As a result of this strong growth, comparison goods represented almost 61% of all retail goods expenditure in 2013 (in nominal terms).

Historically per capita growth in expenditure on convenience goods has been much slower. In fact, over the past ten years spending per capita has on average fallen by 0.9% per year, with moderate positive growth rates in the early 2000s countered by falls in the second half of the decade. Over the period of 1964-2013 the average rate of increase of spending per capita on convenience goods was 0.2% per year (Table 3.4).

Table 3.3: Long-run UK per capita retail expenditure on convenience and comparison goods (2010 prices)

	Constant (2010) Prices, per Capita Consumption (£)						Price Deflators, 2010=100		
	Convenience goods	Comparison goods	All goods	Growth rates (%)			Convenience goods	Comparison goods	All goods
				Convenience goods	Comparison goods	All goods			
1982	1,625	609	2,234	-0.9	3.3	0.2	39.2	99.7	55.7
1983	1,643	644	2,287	1.2	5.6	2.4	41.2	104.6	59.0
1984	1,626	676	2,302	-1.1	5.0	0.6	43.8	108.2	62.7
1985	1,638	715	2,353	0.7	5.8	2.2	45.8	113.2	66.3
1986	1,674	772	2,446	2.2	7.9	3.9	47.6	116.9	69.4
1987	1,709	838	2,547	2.1	8.6	4.1	49.1	119.6	72.3
1988	1,737	911	2,648	1.7	8.6	4.0	51.0	123.5	75.9
1989	1,762	948	2,710	1.4	4.1	2.3	53.7	127.7	79.6
1990	1,758	971	2,729	-0.2	2.4	0.7	57.8	132.6	84.5
1991	1,736	973	2,709	-1.3	0.2	-0.7	61.9	138.9	89.5
1992	1,733	1,010	2,742	-0.2	3.8	1.2	63.8	141.2	92.3
1993	1,751	1,061	2,812	1.1	5.1	2.5	65.1	142.2	94.2
1994	1,765	1,143	2,908	0.8	7.8	3.4	65.8	141.3	95.5
1995	1,750	1,196	2,946	-0.9	4.6	1.3	68.3	143.7	98.9
1996	1,806	1,262	3,068	3.2	5.6	4.2	70.6	146.3	101.7
1997	1,829	1,339	3,167	1.3	6.1	3.2	71.9	143.5	102.2
1998	1,830	1,460	3,290	0.1	9.1	3.9	73.4	140.7	103.3
1999	1,885	1,609	3,493	3.0	10.2	6.2	74.2	135.9	102.7
2000	1,920	1,782	3,702	1.8	10.8	6.0	74.5	129.6	101.1
2001	1,911	1,924	3,835	-0.4	7.9	3.6	76.8	126.1	101.5
2002	1,940	2,125	4,065	1.5	10.5	6.0	77.5	121.5	100.5
2003	1,967	2,322	4,290	1.4	9.3	5.5	78.7	117.8	99.9
2004	2,024	2,444	4,468	2.9	5.2	4.2	79.1	114.2	98.3
2005	2,046	2,562	4,608	1.1	4.9	3.1	80.1	110.3	96.9
2006	2,042	2,722	4,763	-0.2	6.2	3.4	82.3	107.5	96.7
2007	2,015	2,851	4,866	-1.3	4.8	2.2	85.5	105.1	97.0
2008	1,941	2,974	4,915	-3.6	4.3	1.0	91.8	101.8	97.8
2009	1,861	2,927	4,787	-4.1	-1.6	-2.6	96.7	99.5	98.4
2010	1,851	2,991	4,842	-0.5	2.2	1.1	100.0	100.0	100.0
2011	1,805	2,996	4,801	-2.5	0.2	-0.9	106.5	100.8	102.9
2012	1,798	3,078	4,876	-0.4	2.7	1.6	110.6	100.7	104.3
2013	1,789	3,233	5,022	-0.5	5.0	3.0	115.0	100.7	105.8
2014	1,772	3,412	5,184	-1.0	5.5	3.2	118.6	100.7	106.8
2015	1,772	3,545	5,317	0.0	3.9	2.6	121.1	99.9	107.0
2016	1,775	3,679	5,454	0.2	3.8	2.6	123.5	99.3	107.2
2017	1,784	3,830	5,613	0.5	4.1	2.9	126.2	99.0	107.6
2018	1,795	3,982	5,777	0.6	4.0	2.9	129.1	99.0	108.3
2019	1,807	4,133	5,940	0.6	3.8	2.8	132.1	99.0	109.1
2020	1,820	4,287	6,107	0.8	3.7	2.8	135.0	99.1	109.8
2021	1,835	4,445	6,280	0.8	3.7	2.8	138.0	99.3	110.6
2022	1,851	4,607	6,457	0.8	3.6	2.8	141.2	99.6	111.5
2023	1,866	4,771	6,637	0.8	3.6	2.8	144.5	99.9	112.5
2024	1,882	4,940	6,822	0.8	3.5	2.8	148.0	100.3	113.5
2025	1,897	5,113	7,010	0.8	3.5	2.8	151.6	100.7	114.5
Average annual growth rates									
1983-93	0.6%	5.1%	2.1%				4.7%	3.1%	4.8%
1993-03	1.2%	8.2%	4.3%				1.9%	-1.9%	0.6%
2003-08	-0.3%	5.1%	2.8%				3.1%	-2.9%	-0.4%
2008-13	-1.6%	1.7%	0.4%				4.6%	-0.2%	1.6%
2013-19	0.2%	4.2%	2.8%				2.3%	-0.3%	0.5%
2019-24	0.8%	3.6%	2.8%				2.3%	0.3%	0.8%

Oxford Economics' Forecasts

Oxford Economics' forecasts from the UK consumer-spending model are shown in Tables 3.3 and 3.4, and in Figure 3.6. Unlike the alternative pure trend-based projections described in the next sub-section, these forecasts are consistent with past trends, but are also based upon expected changes in other economic variables of interest according to historic relationships.

After GDP growth slowing down to just 0.3% in 2012, the UK economy picked up pace again in 2013

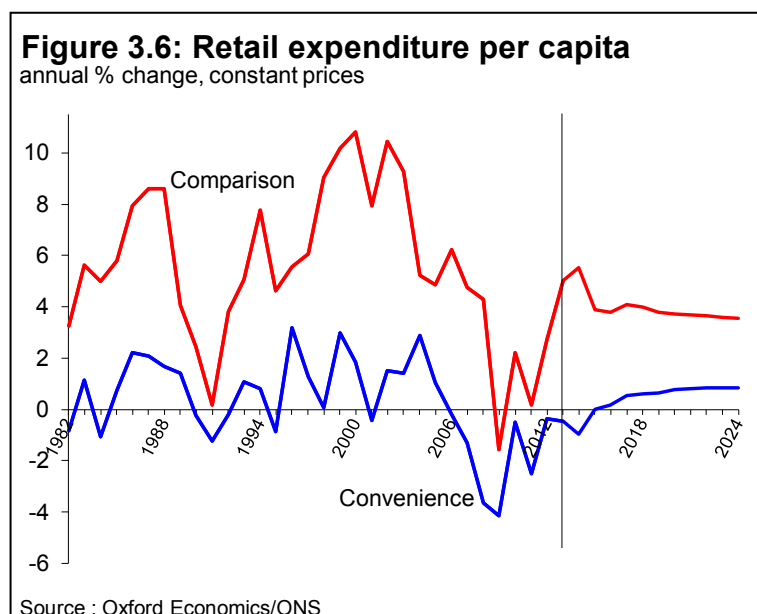
with growth of 1.7%. Furthermore, off the back of strong Q1 and Q2 GDP data we expect it to accelerate further to 3.1% in 2014.

Though official earnings data remain very weak, surveys are beginning to show evidence that a tightening labour market is putting upward pressure on wage growth. Combined with very strong growth in employment, this should generate a steady pickup in nominal household income growth. Furthermore, the inflation outlook remains benign, with the pound still relatively strong, deflationary pressures coming along the supply chain and the large amount of spare capacity squeezing margins. We expect CPI inflation to remain in the 1½-1¾% range over the next eighteen months which, combined with the acceleration in wage growth, will allow spending power to gradually improve. A fall in the savings ratio has helped to finance the pickup in household spending growth over the past year. But the scope for it to fall further looks limited, given the desire of households to deleverage and that the savings ratio is now back close to its long run average level. So we expect consumer spending to track real incomes more closely going forward. Combined with an anticipated rise in interest rates, this points to a slight slowdown in total consumer spending growth from 2.8% this year to 2.2% in 2015 and 2016.

Table 3.4: Forecasts of UK per capita retail expenditure by goods type (2010 prices)

	Expenditure per capita (£): Oxford Economics' forecasts								
	Convenience goods	Comparison goods	All goods	Convenience Goods Detail			Comparison Goods Detail		
				Alcohol (off-licence)	Tobacco	Food	Clothing & Footwear	H'hold Goods	Audio-vis Goods
2012	1,798	3,078	4,876	221	151	1308	880	549	373
2013	1,789	3,233	5,022	215	143	1316	932	573	388
2014	1,772	3,412	5,184	213	134	1313	977	600	414
2019	1,807	4,133	5,940	204	118	1377	1227	675	557
2024	1,882	4,940	6,822	204	111	1456	1501	760	712
Average annual forecast growth rates									
2013-19	0.2%	4.2%	2.8%	-0.9%	-3.2%	0.8%	4.7%	2.8%	6.2%
2013-24	0.5%	3.9%	2.8%	-0.5%	-2.3%	0.9%	4.4%	2.6%	5.7%
Average annual historical growth rates									
1964-13	0.2%	4.4%	1.9%	2.0%	-2.6%	0.5%	4.8%	2.3%	10.0%
1977-13	0.3%	5.1%	2.4%	1.7%	-3.2%	0.7%	6.0%	2.6%	11.2%
1983-13	0.3%	5.5%	2.7%	1.9%	-3.2%	0.6%	6.4%	2.8%	11.7%
1987-13	0.2%	5.3%	2.6%	1.8%	-3.3%	0.5%	6.4%	2.5%	11.3%
1993-13	0.1%	5.7%	2.9%	2.3%	-3.7%	0.4%	7.7%	2.5%	11.5%
1997-13	-0.1%	5.7%	2.9%	1.6%	-3.9%	0.3%	8.4%	2.1%	11.8%
2003-13	-0.9%	3.4%	1.6%	-0.5%	-4.2%	-0.4%	6.6%	-0.8%	10.0%

Based on this improved economic outlook, our forecasts are for growth in per capita expenditure on comparison goods to accelerate to 5.5% in 2014, and the fall back slightly to around 3.8% in 2015 and 2016. Over the whole forecast period of 2013-24 we expect per capita expenditure on comparison goods to grow by an average of 3.9% per year, which is significantly faster than the rate seen during the last five years, but slower than the rate seen during the boom period of early 2000s.



Our forecast is for per capita spending on convenience goods to fall by 1% in 2014, which would make it the ninth consecutive year of contraction. Slow recovery is anticipated to start in 2016 with growth of 0.2%, and in 2017 we expect it to increase to 0.5%. Over the period of 2013-24 we forecast per capita spending on convenience goods to grow by 0.5% per year, as households start to feel more secure about their jobs and potential future incomes.

It is worth noting that the 3.9% average growth forecast for comparison goods over 2013-24 is in between the short-term and medium-term trend projections discussed in the next sub-section, while the 0.5% rate forecast for convenience exactly matches the 0.5% long-term and ultra-long term growth projection. In other words, although the Oxford Economics forecast and the trend-based projections have been prepared in very different ways, some of their results are very similar.

Trend Projections

Projections of UK annual average retail expenditure per capita by goods type, including Special Forms of Trading and in constant 2010 prices (chain-linked volumes), are presented in Table 3.5, and illustrated in Figures 3.7 to 3.15. These projections are based on time series analysis of past trends in expenditure per capita data from 1964 (the earliest year for which data are available), and are derived by fitting log-linear regression lines to the data using the method of least squares. The estimated growth rates are shown in the second row of Table 3.5. The projections are derived solely from past trends and take no account of current economics or future expectations.

Convenience goods' retail expenditure has been erratic over the last 40 years, with low trend growth over the period as a whole. Therefore the statistical relationship is less reliable and there appear to have been some trend breaks. Of the four trends illustrated, the two most statistically robust estimates of trend growth calculated are the ultra-long term (1964-2013) and short term (2003-13). However, as the short-term trend largely reflects the impact of the recent recession, we expect future spending on convenience goods to start recovering and to be closer to the ultra-long term trend.

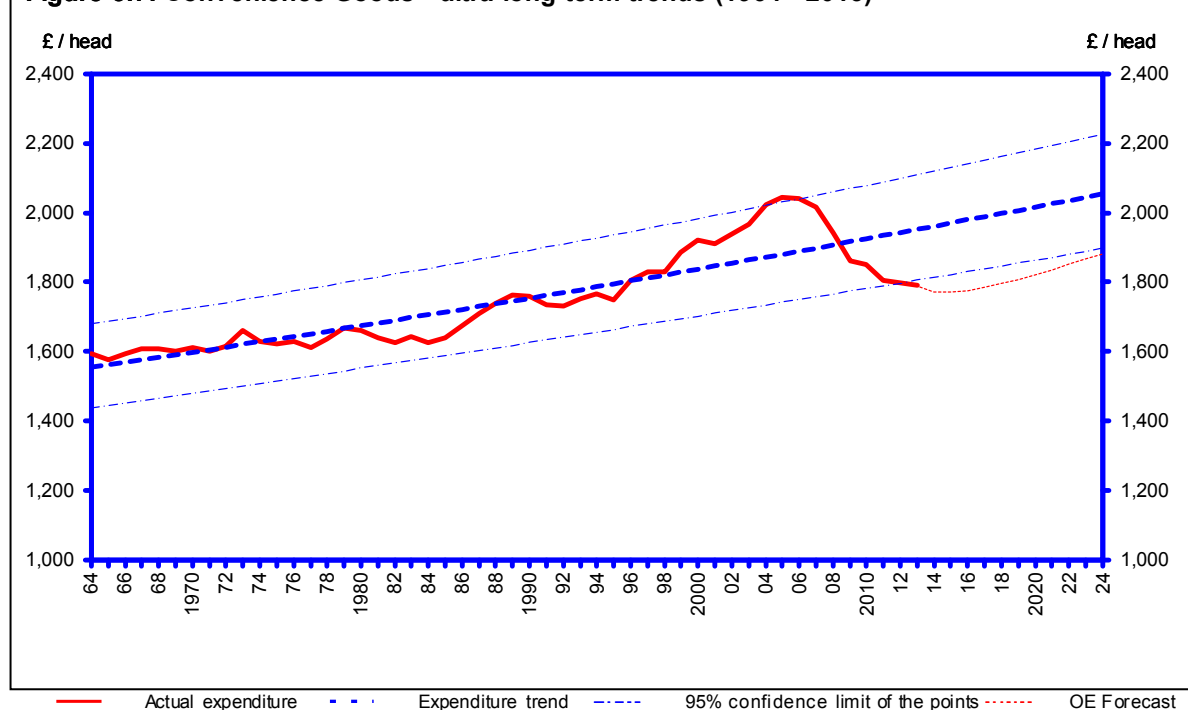
Trend growth rates of comparison goods expenditure per capita are statistically robust for all periods, with the strongest relationship seen over the long-term (1983-2013), when the fitted annual growth rate for spending on comparison goods per capita was 6%. Having said that, the fit over the ultra-long term, which has a growth rate of 4.9%, is almost just as good.

Trend Projections

Table 3.5: Growth and projections of UK annual average consumer retail expenditure per capita by goods type (2010 prices)

	Ultra long term trends 1964-2013			Long term trends 1983-2013			Medium term trends 1993-2013			Short term trends 2003-2013		
	Conv. goods	Comp. goods	All goods	Conv. goods	Comp. goods	All goods	Conv. goods	Comp. goods	All goods	Conv. goods	Comp. goods	All goods
R square	0.771	0.969	0.925	0.534	0.981	0.966	0.083	0.949	0.923	0.801	0.909	0.702
Average annual growth	0.5%	4.9%	2.2%	0.5%	6.0%	3.0%	0.2%	6.2%	3.2%	-1.4%	3.0%	1.2%
95% confidence limits	(+/-0.07)	(+/-0.25)	(+/-0.18)	(+/-0.19)	(+/-0.31)	(+/-0.21)	(+/-0.38)	(+/-0.66)	(+/-0.44)	(+/-0.55)	(+/-0.71)	(+/-0.57)
Actual and projected expenditure per capita (2010 prices) and 95% confidence limits for the regression points and lines												
	£	£	£	£	£	£	£	£	£	£	£	£
2012 expenditure	1,798	3,078	4,876	1,798	3,078	4,876	1,798	3,078	4,876	1,798	3,078	4,876
2012 projected expenditure	1,943	3,049	4,735	1,959	3,481	5,241	1,921	3,515	5,323	1,811	3,168	4,970
95% limits: -Points	(+/-151)	(+/-798)	(+/-969)	(+/-192)	(+/-563)	(+/-582)	(+/-217)	(+/-695)	(+/-700)	(+/-113)	(+/-256)	(+/-323)
-Line	(+/-38)	(+/-201)	(+/-225)	(+/-60)	(+/-175)	(+/-181)	(+/-77)	(+/-246)	(+/-249)	(+/-47)	(+/-108)	(+/-136)
2013 expenditure	1,789	3,233	5,022	1,789	3,233	5,022	1,789	3,233	5,022	1,789	3,233	5,022
2013 projected expenditure	1,952	3,198	4,838	1,970	3,690	5,400	1,925	3,731	5,496	1,785	3,263	5,028
95% limits: -Points	(+/-152)	(+/-838)	(+/-909)	(+/-194)	(+/-600)	(+/-602)	(+/-219)	(+/-745)	(+/-731)	(+/-114)	(+/-272)	(+/-337)
-Line	(+/-40)	(+/-218)	(+/-237)	(+/-63)	(+/-195)	(+/-196)	(+/-83)	(+/-282)	(+/-277)	(+/-54)	(+/-129)	(+/-160)
2014 projected expenditure	1,961	3,353	4,942	1,949	3,690	5,400	1,925	3,731	5,496	1,785	3,263	5,028
95% limits: -Points	(+/-153)	(+/-881)	(+/-931)	(+/-196)	(+/-639)	(+/-624)	(+/-222)	(+/-800)	(+/-763)	(+/-117)	(+/-290)	(+/-353)
-Line	(+/-41)	(+/-235)	(+/-250)	(+/-67)	(+/-217)	(+/-212)	(+/-90)	(+/-322)	(+/-307)	(+/-61)	(+/-152)	(+/-185)
2019 projected expenditure	2,007	4,253	5,499	2,033	5,238	6,459	1,953	5,339	6,656	1,636	3,898	5,391
95% limits: -Points	(+/-158)	(+/-1130)	(+/-1048)	(+/-208)	(+/-883)	(+/-747)	(+/-240)	(+/-1152)	(+/-956)	(+/-133)	(+/-413)	(+/-459)
-Line	(+/-48)	(+/-343)	(+/-320)	(+/-85)	(+/-362)	(+/-307)	(+/-124)	(+/-591)	(+/-491)	(+/-96)	(+/-297)	(+/-331)
2024 projected expenditure	2,054	5,393	6,118	2,087	7,015	7,498	1,976	7,195	7,808	1,521	4,521	5,713
95% limits: -Points	(+/-164)	(+/-1453)	(+/-1182)	(+/-221)	(+/-1228)	(+/-900)	(+/-263)	(+/-1681)	(+/-1212)	(+/-154)	(+/-594)	(+/-604)
-Line	(+/-56)	(+/-494)	(+/-404)	(+/-105)	(+/-584)	(+/-429)	(+/-160)	(+/-1019)	(+/-737)	(+/-127)	(+/-492)	(+/-500)

Figure 3.7: Convenience Goods - ultra long term trends (1964 - 2013)



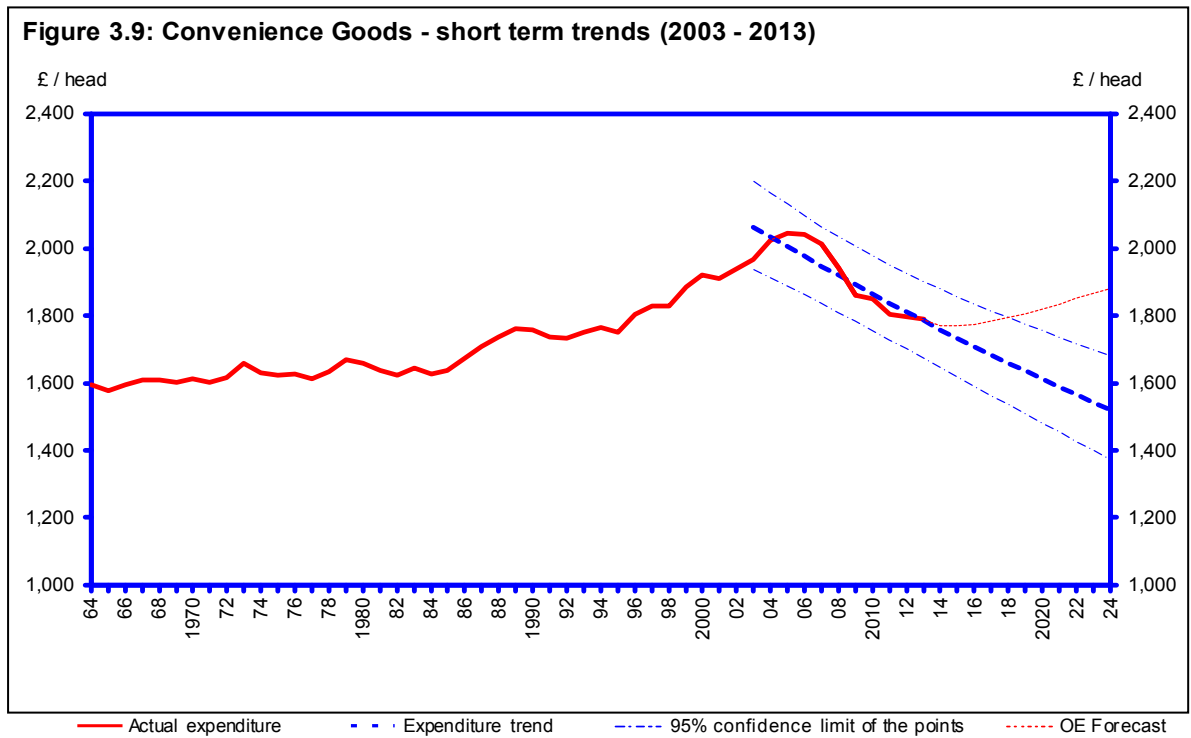
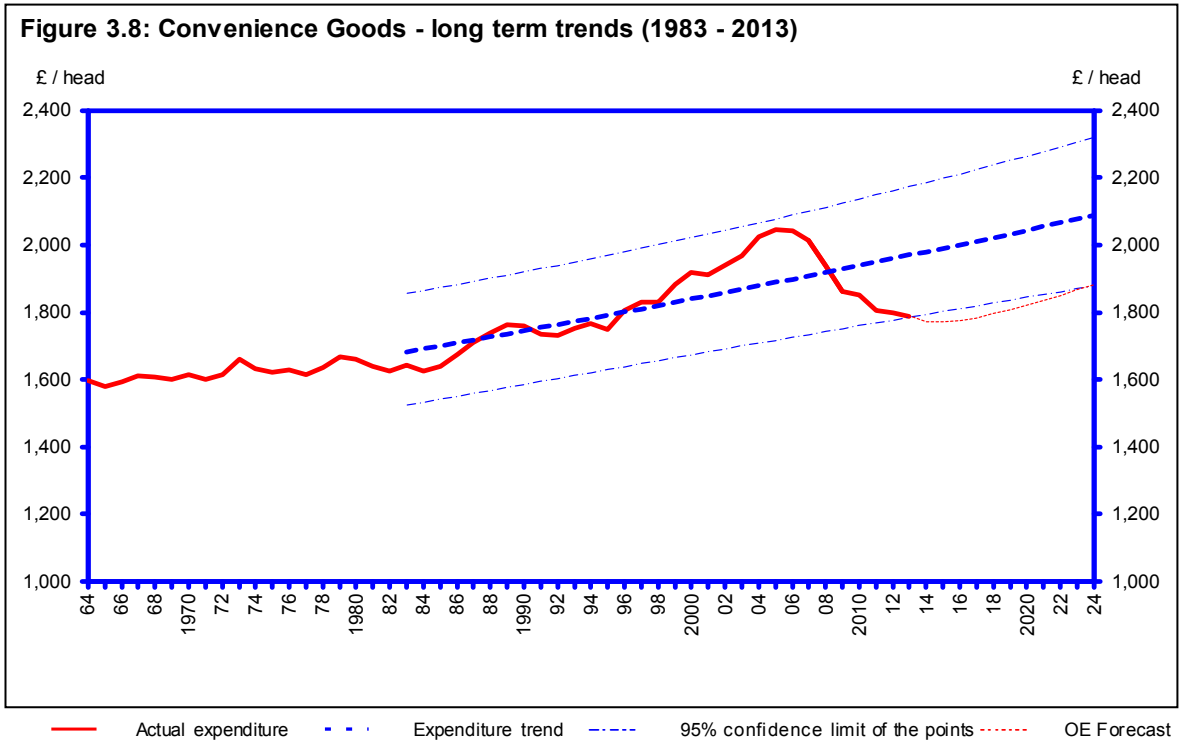


Figure 3.10: Comparison Goods - ultra long term trends (1964 - 2013)

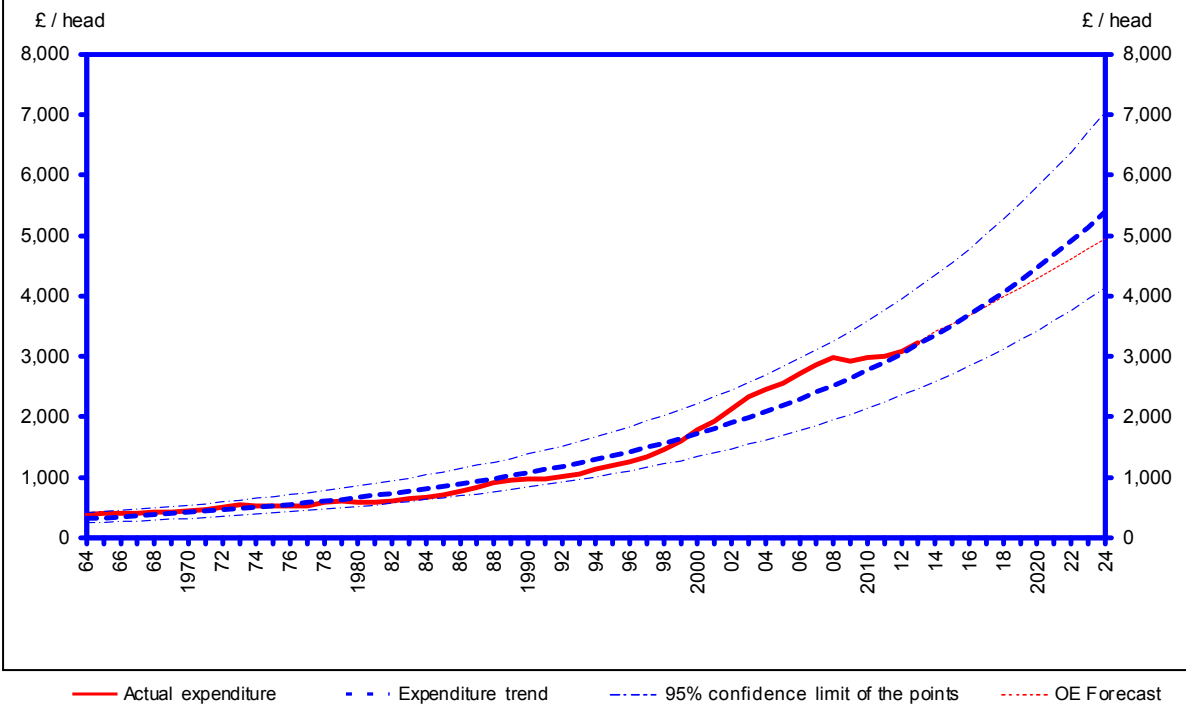


Figure 3.11: Comparison Goods - long term trends (1983 - 2013)

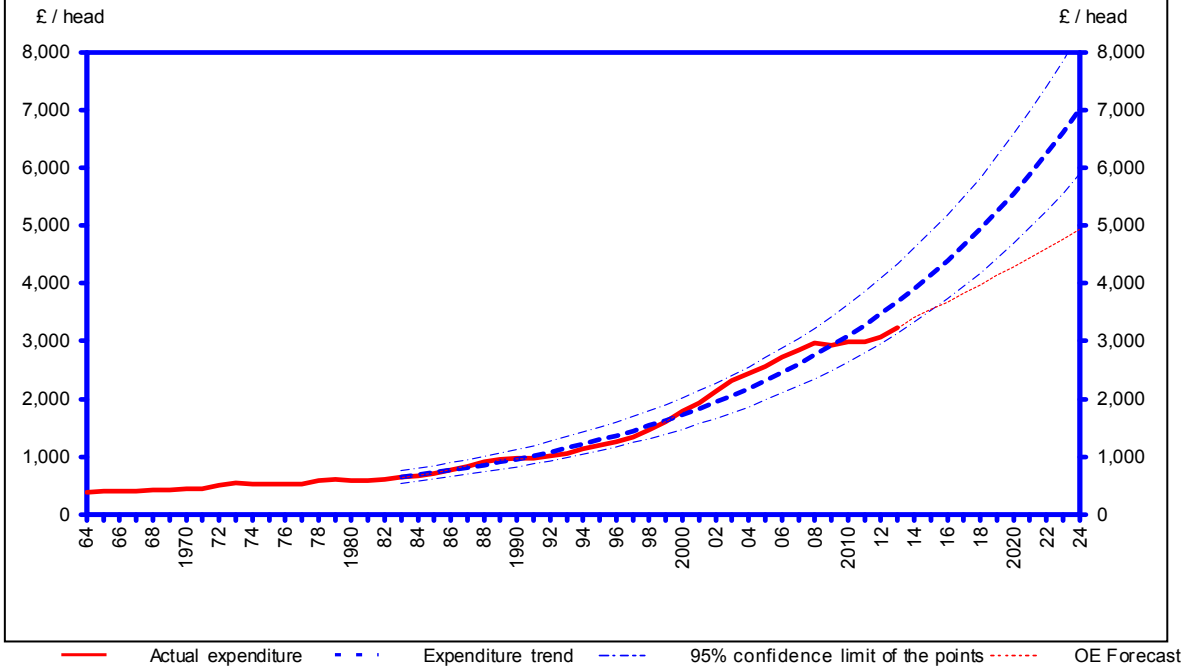


Figure 3.12: Comparison Goods - short term trends (2003 - 2013)

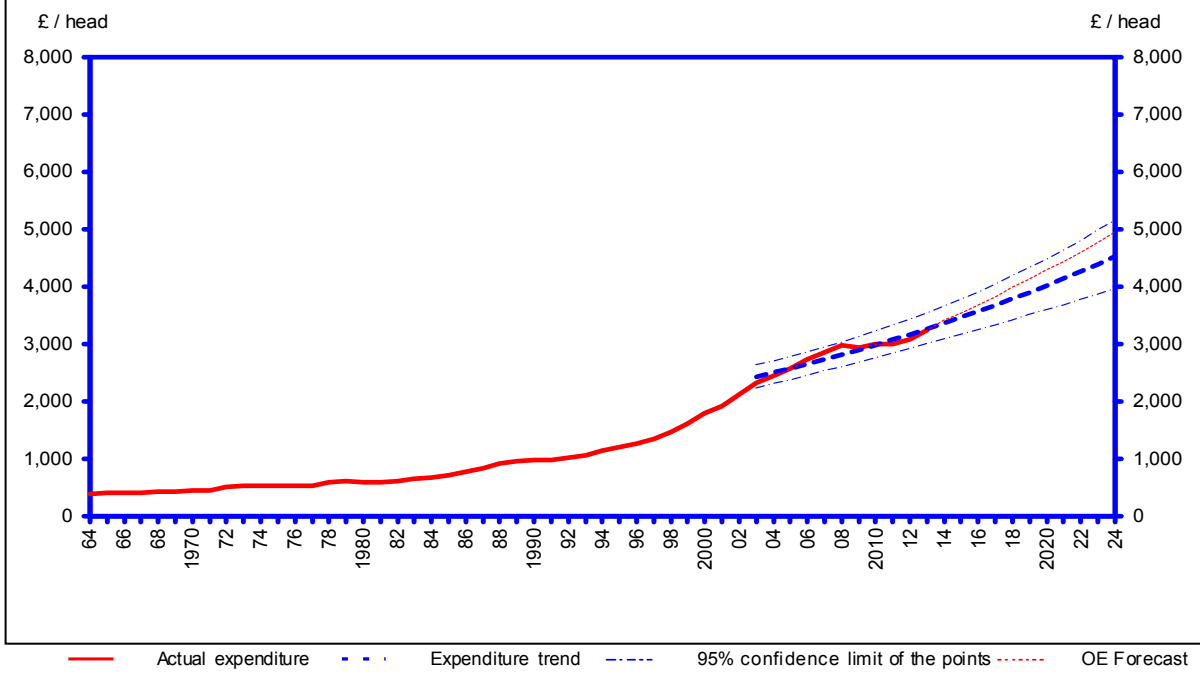
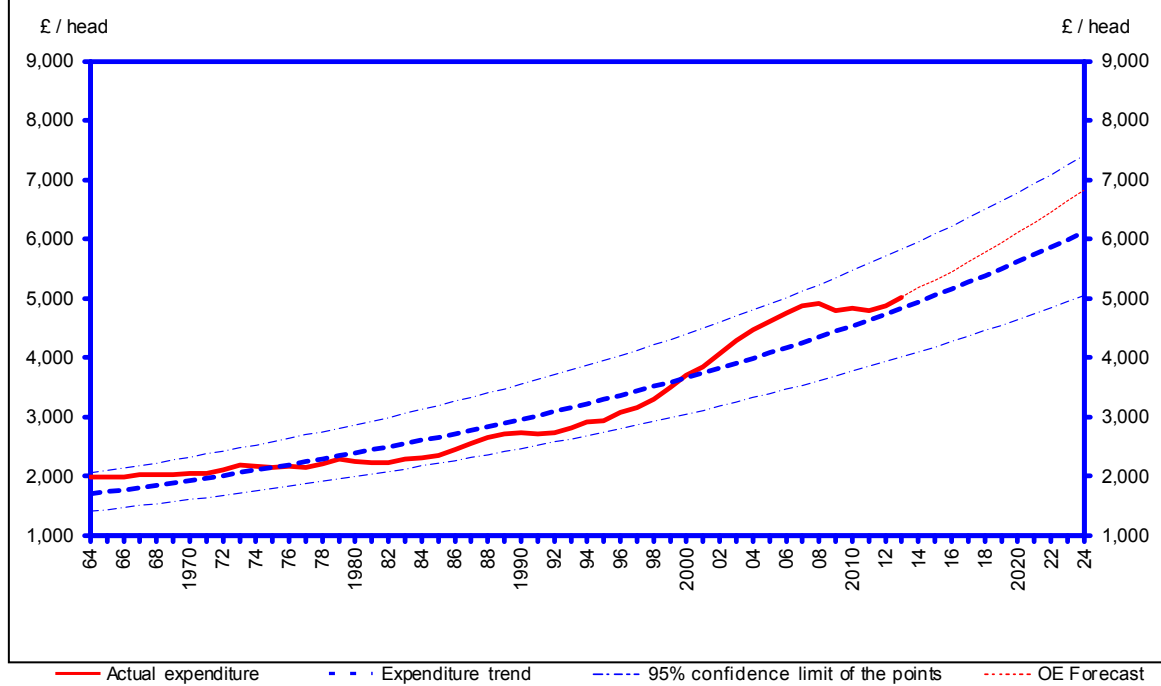
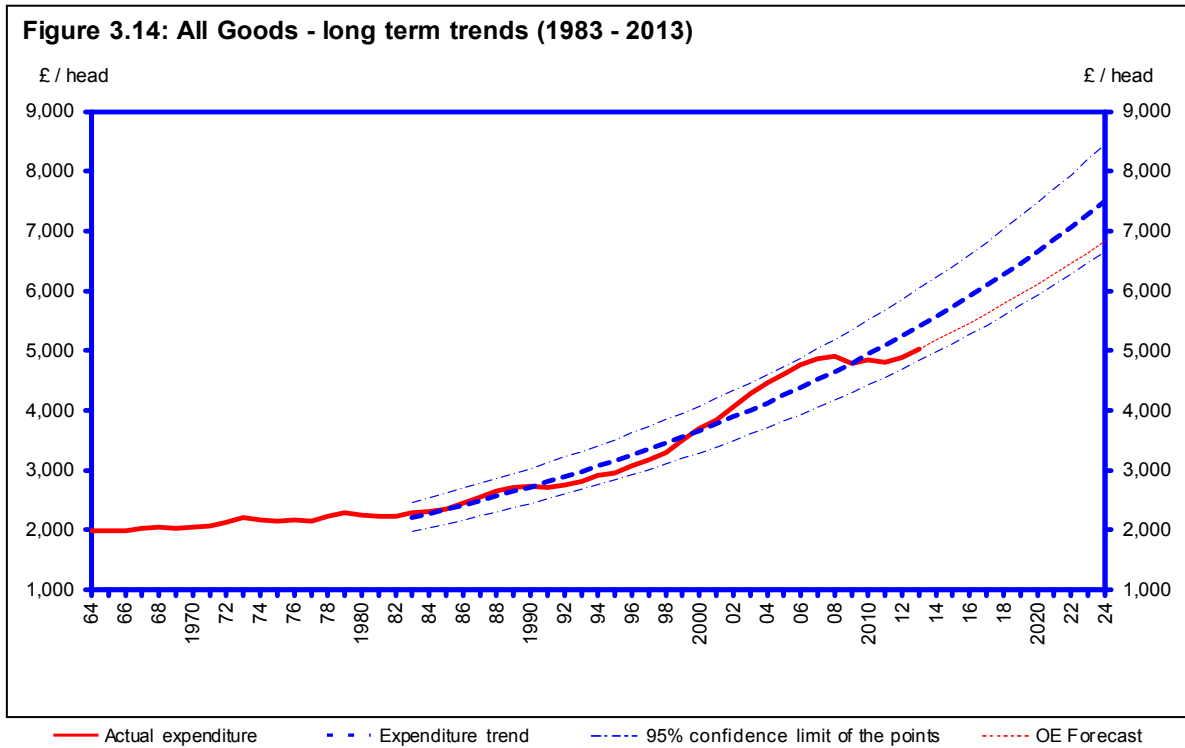
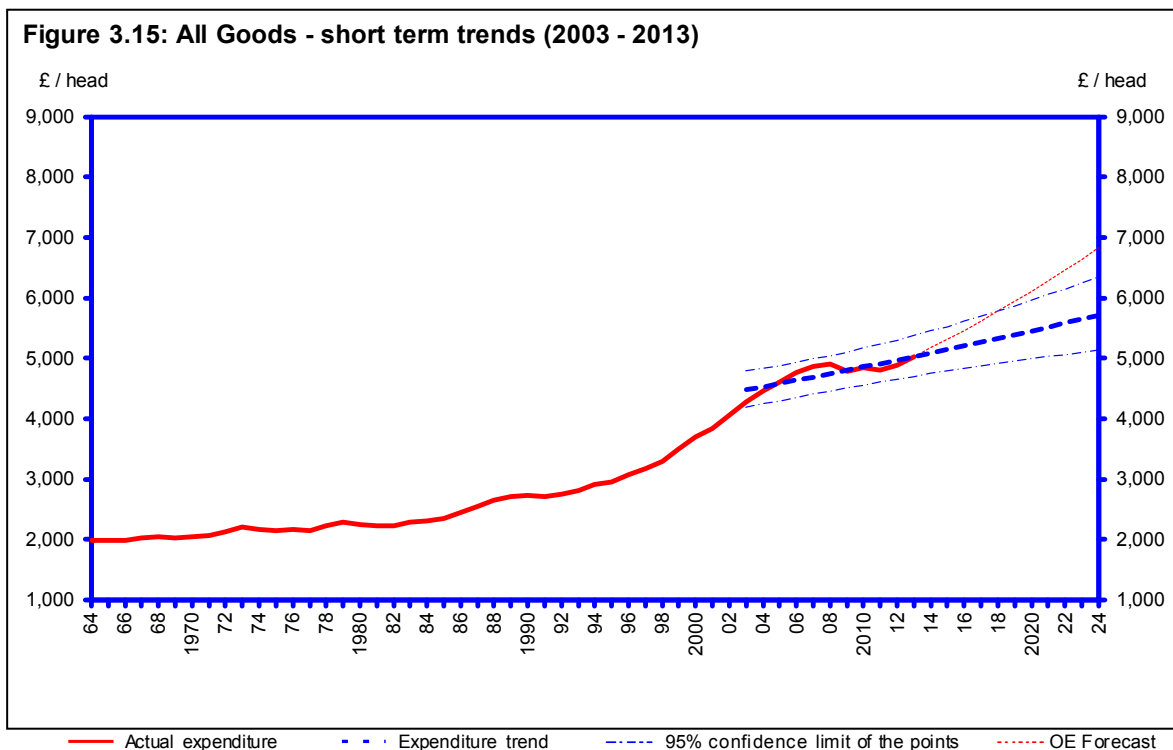


Figure 3.13: All Goods - ultra long term trends (1964 - 2013)







Prices

Price indices for convenience goods, comparison goods and all goods are calculated directly from the series of consumer expenditure by type at current and constant prices. The price indices are therefore fully compatible with the estimates of consumer retail expenditure per head given in this report. Use of these calculated indices with the expenditure estimates is preferable to the use of either the retail price index (RPI) or the consumer price index (CPI) as both of them incorporate a significant number of items not purchased through retail outlets.

Prices of comparison good started falling in late 1990s, and by 2008 they were around 30% lower than their peak in 1996. Dominated by decreasing prices of electrical goods, this deflation is in line with technological advances and the movement of production to lower cost countries, especially China and India, feeding through into prices. This trend is also evident for clothing and textiles.

Comparison goods prices were affected by offsetting tendencies in 2009. The depreciation of sterling acted to push prices up while the temporary VAT cut helped to keep them down. The overall impact was a fall in comparison goods prices of more than 2% in 2009 following a 3.2% fall in 2008; however in 2010 as spending started to recover the prices were up by 0.5%. In 2011 comparison goods inflation was similar to that of 2010, partly being held up by the VAT increase to 20% introduced from January 2011. Overall, during 2008-13 the falls in prices of comparison goods have slowed noticeably, which can be partly attributed to incomes rising in China and India, and pushing up the costs of production.

Convenience goods price inflation has historically been much higher than that of comparison goods and prices have continued to rise. Furthermore, since 2007 there has been a tendency for acceleration in the rate of inflation, with prices rising by 7.4% in 2008 and then more recently by 4% in 2013. Some elements of convenience goods are VATable and were also affected by the 2011 VAT increase.

A

Appendix A: Base Area Profile Report

The following pages give Consumer Retail Expenditure estimates produced from Pitney Bowes Software enabling comparisons on a consistent basis between local area figures and the National average. Figures are given for the United Kingdom and Great Britain for 2012, 2013, 2014, 2019, 2024 and 2025.

Pitney Bowes Software

Consumer Retail Expenditure Total (£mill Per Annum, EST=Estimates, FOR=Forecast, PB=Price Base)

CONSUMER EXPENDITURE	UK: 2012 EST, 2012 PB	GB: 2012 EST, 2012 PB	UK: 2013 EST, 2013 PB	GB: 2013 EST, 2013 PB	UK: 2014 EST, 2014 PB	GB: 2014 EST, 2014 PB	UK: 2019 FOR, 2013 PB	GB: 2019 FOR, 2013 PB	UK: 2024 FOR, 2013 PB	GB: 2024 FOR, 2013 PB	UK: 2025 FOR, 2013 PB	GB: 2025 FOR, 2013 PB
# OA's	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759
Usually Resident Population	64	62	64	62	65	63	67	65	69	67	69	67
Private Households	27	26	27	26	27	26	28	28	30	29	30	29
Food	89,558	86,992	94,008	91,318	95,406	92,694	1,02,233	99,438	1,11,218	1,08,253	1,13,014	1,10,014
Alcoholic Drink	16,267	15,814	16,587	16,126	18,874	18,352	16,332	15,897	16,821	16,384	16,913	16,475
Tobacco	11,186	10,650	11,354	10,810	11,369	10,828	9,698	9,253	9,367	8,947	9,305	8,889
Books Newspapers Magazines	6,933	6,725	6,748	6,545	6,572	6,376	5,646	5,486	5,550	5,398	5,544	5,393
Books	2,993	2,926	2,882	2,817	2,795	2,733	2,614	2,558	2,619	2,565	2,618	2,564
Newspapers and Magazines	3,940	3,799	3,866	3,728	3,777	3,643	3,032	2,928	2,931	2,833	2,926	2,829
Clothing and Footwear	53,901	51,434	57,730	55,091	60,877	58,113	80,029	76,531	1,01,588	97,259	1,06,291	1,01,781
Footwear	8,030	7,639	8,418	8,008	9,046	8,609	12,321	11,748	15,460	14,759	16,141	15,412
Clothing	45,871	43,795	49,312	47,083	51,831	49,504	67,708	64,783	86,128	82,500	90,150	86,369
Furniture/Floor/Textiles	22,685	22,179	24,064	23,528	25,405	24,843	29,124	28,498	33,621	32,913	34,564	33,839
Furniture/Floor Coverings	16,925	16,581	17,928	17,564	18,948	18,566	20,881	20,476	23,618	23,171	24,185	23,730
HH Textiles/Soft Furnishings	5,760	5,598	6,136	5,964	6,457	6,277	8,243	8,022	10,003	9,742	10,379	10,109
Audio-visual Equipment	25,836	25,173	25,744	25,088	26,715	26,043	37,158	36,250	47,840	46,696	50,171	48,975
Domestic Appliances	6,448	6,330	6,800	6,676	7,416	7,282	9,011	8,854	10,890	10,705	11,293	11,102
AV/Photo/Optical Goods	18,795	18,278	18,331	17,828	18,655	18,147	27,380	26,663	36,062	35,142	37,965	37,000
Telephone/Fax Equipment	593	565	613	584	644	614	767	733	888	849	913	873
Hardware and DIY Supplies	12,815	12,468	12,961	12,612	13,717	13,350	15,460	15,062	17,300	16,865	17,672	17,230
China Glass and Utensils	4,805	4,664	5,069	4,921	5,373	5,217	6,260	6,085	7,221	7,024	7,408	7,207
Repair/Maintenance Materials	1,147	1,125	1,235	1,212	1,281	1,257	1,603	1,574	1,824	1,792	1,867	1,834
Tools/Equip for Home/Garden	3,394	3,306	3,489	3,399	3,714	3,619	3,848	3,753	4,180	4,079	4,255	4,153
Gardens/Plants/Flowers	3,469	3,373	3,168	3,080	3,349	3,257	3,749	3,650	4,075	3,970	4,142	4,036
Other Goods	82,343	79,973	87,770	85,235	94,404	91,679	1,13,802	1,10,655	1,37,522	1,33,802	1,42,642	1,38,795
Chemists' Goods	27,129	26,350	29,111	28,276	31,394	30,500	37,624	36,595	44,976	43,777	46,520	45,285
Jewellery/Watches/Clocks	6,739	6,612	7,426	7,286	8,512	8,353	9,378	9,209	10,326	10,145	10,508	10,324
Non-durable HH Goods	4,122	4,019	4,292	4,185	4,395	4,286	4,861	4,745	5,378	5,253	5,480	5,353
Bicycles	1,583	1,570	1,447	1,436	1,502	1,490	1,999	1,984	2,472	2,454	2,569	2,550
Recreational Goods	35,202	34,268	36,939	35,965	38,710	37,698	48,137	46,941	59,696	58,256	62,274	60,778
Other Miscellaneous Goods	7,568	7,154	8,555	8,087	9,891	9,352	11,803	11,181	14,674	13,917	15,291	14,505
Total Goods	3,21,524	3,11,408	3,36,966	3,26,353	3,53,339	3,42,278	4,09,482	3,97,070	4,80,827	4,66,517	4,96,116	4,81,391
Convenience Goods	1,25,073	1,21,274	1,30,107	1,26,167	1,33,821	1,29,803	1,36,156	1,32,261	1,45,715	1,41,670	1,47,638	1,43,560
Comparison Goods	1,96,451	1,90,134	2,06,859	2,00,186	2,19,518	2,12,475	2,73,326	2,64,809	3,35,112	3,24,847	3,48,478	3,37,831
Bulky Goods	23,373	22,911	24,728	24,240	26,364	25,848	29,892	29,330	34,508	33,876	35,478	34,832
DIY Related Goods	10,722	10,460	10,761	10,501	11,371	11,098	12,536	12,248	13,848	13,537	14,122	13,807

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LEISURE EXPENDITURE	UK: 2012 EST, 2012 PB	GB: 2012 EST, 2012 PB	UK: 2013 EST, 2013 PB	GB: 2013 EST, 2013 PB	UK: 2014 EST, 2014 PB	GB: 2014 EST, 2014 PB	UK: 2019 FOR, 2013 PB	GB: 2019 FOR, 2013 PB	UK: 2024 FOR, 2013 PB	GB: 2024 FOR, 2013 PB	UK: 2025 FOR, 2013 PB	GB: 2025 FOR, 2013 PB
# OA's	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759
Usually Resident Population	64	62	64	62	65	63	67	65	69	67	69	67
Private Households	27	26	27	26	27	26	28	28	30	29	30	29
Audio-Visual Goods	18,795	18,278	18,331	17,828	18,655	18,147	27,380	26,663	36,062	35,142	37,965	37,000
Gardens, plants and flowers	3,469	3,373	3,168	3,080	3,349	3,257	3,749	3,650	4,075	3,970	4,142	4,036
Recreational goods	35,202	34,268	36,939	35,965	38,710	37,698	48,137	46,941	59,696	58,256	62,274	60,778
Durables for indoor/outdoor recreation	8,312	7,982	8,287	7,958	8,438	8,106	9,323	8,971	10,923	10,521	11,264	10,851
Games, toys and hobbies	17,454	17,043	19,129	18,679	20,878	20,390	28,173	27,539	36,475	35,674	38,372	37,533
Sports goods	2,775	2,711	2,859	2,793	2,900	2,833	3,538	3,460	4,414	4,319	4,604	4,505
Pets and related products	6,661	6,532	6,664	6,535	6,494	6,369	7,103	6,971	7,884	7,742	8,034	7,889
Books	2,993	2,926	2,882	2,817	2,795	2,733	2,614	2,558	2,619	2,565	2,618	2,564
Recreational and Cultural Services	35,627	34,575	36,536	35,458	37,722	36,617	41,918	40,736	48,100	46,777	49,327	47,976
Restaurants	75,560	72,841	77,412	74,630	81,629	78,716	85,885	82,941	92,748	89,651	93,780	90,662
Hotels	7,328	7,241	7,911	7,817	8,996	8,890	12,703	12,559	16,477	16,296	17,127	16,939
Hair and Personal Grooming	5,750	5,530	5,890	5,665	6,082	5,851	6,682	6,438	7,195	6,939	7,267	7,010
Total Leisure Spend	1,84,724	1,79,032	1,89,069	1,83,260	1,97,938	1,91,909	2,29,068	2,22,486	2,66,972	2,59,596	2,74,500	2,66,965
Leisure Goods	60,459	58,845	61,320	59,690	63,509	61,835	81,880	79,812	1,02,452	99,933	1,06,999	1,04,378
Leisure Services	1,24,265	1,20,187	1,27,749	1,23,570	1,34,429	1,30,074	1,47,188	1,42,674	1,64,520	1,59,663	1,67,501	1,62,587

OTHER EXPENDITURE	UK: 2012 EST, 2012 PB	GB: 2012 EST, 2012 PB	UK: 2013 EST, 2013 PB	GB: 2013 EST, 2013 PB	UK: 2014 EST, 2014 PB	GB: 2014 EST, 2014 PB	UK: 2019 FOR, 2013 PB	GB: 2019 FOR, 2013 PB	UK: 2024 FOR, 2013 PB	GB: 2024 FOR, 2013 PB	UK: 2025 FOR, 2013 PB	GB: 2025 FOR, 2013 PB
# OA's	3,394	3,306	3,489	3,399	3,714	3,619	3,848	3,753	4,180	4,079	4,255	4,153
Usually Resident Population	64	62	64	62	65	63	67	65	69	67	69	67
Private Households	27	26	27	26	27	26	28	28	30	29	30	29
Owner-Occupier Rents (Imputed Rents)	1,52,011	1,49,520	1,55,605	1,53,058	1,61,692	1,59,068	1,68,333	1,65,723	1,79,266	1,76,567	1,81,310	1,78,593
Actual Rents	53,845	52,963	56,389	55,466	59,827	58,856	64,632	63,630	73,962	72,848	75,986	74,847
Telephone and fax services	19,007	18,513	20,231	19,706	21,668	21,110	24,446	23,841	28,374	27,690	29,282	28,579
Education	14,640	14,297	16,758	16,366	18,477	18,049	18,012	17,613	18,835	18,429	18,968	18,561
Domestic service and household services	6,232	6,073	6,689	6,519	7,317	7,132	7,696	7,509	8,288	8,092	8,391	8,193
Housing R&M services	1,391	1,365	1,577	1,547	1,712	1,680	1,955	1,920	2,074	2,038	2,094	2,057
Insurance	20,862	20,338	23,284	22,700	22,997	22,424	22,361	21,826	22,369	21,847	22,357	21,838
Financial services	28,486	28,181	30,159	29,836	34,205	33,842	34,885	34,530	40,010	39,613	41,195	40,789
Vehicle Fuels and lubricants	30,809	29,609	29,876	28,714	28,111	27,024	28,831	27,756	29,581	28,504	29,738	28,660
Transport services	37,232	36,257	40,578	39,517	43,065	41,948	46,976	45,811	52,663	51,394	53,816	52,526
Electricity, Gas and Other fuels	32,385	31,153	34,490	33,179	33,909	32,629	32,858	31,663	33,210	32,031	33,317	32,139

Pitney Bowes Software

Consumer Retail Expenditure Hhold (£ Per Annum, EST=Estimates, FOR=Forecast, PB=Price Base)

CONSUMER EXPENDITURE	UK: 2012 EST, 2012 PB	GB: 2012 EST, 2012 PB	UK: 2013 EST, 2013 PB	GB: 2013 EST, 2013 PB	UK: 2014 EST, 2014 PB	GB: 2014 EST, 2014 PB	UK: 2019 FOR, 2013 PB	GB: 2019 FOR, 2013 PB	UK: 2024 FOR, 2013 PB	GB: 2024 FOR, 2013 PB	UK: 2025 FOR, 2013 PB	GB: 2025 FOR, 2013 PB
# OA's	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759
Usually Resident Population	64	62	64	62	65	63	67	65	69	67	69	67
Private Households	27	26	27	26	27	26	28	28	30	29	30	29
Food	3,354	3,347	3,491	3,484	3,514	3,507	3,606	3,604	3,760	3,762	3,786	3,788
Alcoholic Drink	609	608	616	615	695	694	576	576	569	569	567	567
Tobacco	419	410	422	412	419	410	342	335	317	311	312	306
Books Newspapers Magazines	260	259	251	250	242	241	199	199	188	188	186	186
Books	112	113	107	107	103	103	92	93	89	89	88	88
Newspapers and Magazines	148	146	144	142	139	138	107	106	99	98	98	97
Clothing and Footwear	2,018	1,979	2,144	2,102	2,242	2,199	2,823	2,774	3,435	3,380	3,561	3,505
Footwear	301	294	313	306	333	326	435	426	523	513	541	531
Clothing	1,718	1,685	1,831	1,797	1,909	1,873	2,388	2,348	2,912	2,867	3,020	2,974
Furniture/Floor/Textiles	850	853	894	898	936	940	1,027	1,033	1,137	1,144	1,158	1,165
Furniture/Floor Coverings	634	638	666	670	698	703	736	742	799	805	810	817
HH Textiles/Soft Furnishings	216	215	228	228	238	238	291	291	338	339	348	348
Audio-visual Equipment	968	968	956	957	984	985	1,311	1,314	1,618	1,623	1,681	1,686
Domestic Appliances	241	244	253	255	273	276	318	321	368	372	378	382
AV/Photo/Optical Goods	704	703	681	680	687	687	966	966	1,219	1,221	1,272	1,274
Telephone/Fax Equipment	22	22	23	22	24	23	27	27	30	30	31	30
Hardware and DIY Supplies	480	480	481	481	505	505	545	546	585	586	592	593
China Glass and Utensils	180	179	188	188	198	197	221	221	244	244	248	248
Repair/Maintenance Materials	43	43	46	46	47	48	57	57	62	62	63	63
Tools/Equip for Home/Garden	127	127	130	130	137	137	136	136	141	142	143	143
Gardens/Plants/Flowers	130	130	118	118	123	123	132	132	138	138	139	139
Other Goods	3,084	3,077	3,260	3,252	3,477	3,469	4,014	4,011	4,650	4,650	4,778	4,779
Chemists' Goods	1,016	1,014	1,081	1,079	1,156	1,154	1,327	1,326	1,521	1,521	1,558	1,559
Jewellery/Watches/Clocks	252	254	276	278	313	316	331	334	349	353	352	355
Non-durable HH Goods	154	155	159	160	162	162	171	172	182	183	184	184
Bicycles	59	60	54	55	55	56	71	72	84	85	86	88
Recreational Goods	1,318	1,318	1,372	1,372	1,426	1,426	1,698	1,701	2,018	2,025	2,086	2,093
Other Miscellaneous Goods	283	275	318	309	364	354	416	405	496	484	512	499
Total Goods	12,040	11,981	12,514	12,452	13,013	12,952	14,442	14,391	16,258	16,212	16,620	16,575
Convenience Goods	4,684	4,666	4,832	4,814	4,928	4,912	4,802	4,794	4,927	4,923	4,946	4,943
Comparison Goods	7,357	7,315	7,682	7,638	8,084	8,040	9,640	9,598	11,331	11,289	11,674	11,632
Bulky Goods	875	881	918	925	971	978	1,054	1,063	1,167	1,177	1,188	1,199
DIY Related Goods	402	402	400	401	419	420	442	444	468	470	473	475

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LEISURE EXPENDITURE	UK: 2012 EST, 2012 PB	GB: 2012 EST, 2012 PB	UK: 2013 EST, 2013 PB	GB: 2013 EST, 2013 PB	UK: 2014 EST, 2014 PB	GB: 2014 EST, 2014 PB	UK: 2019 FOR, 2013 PB	GB: 2019 FOR, 2013 PB	UK: 2024 FOR, 2013 PB	GB: 2024 FOR, 2013 PB	UK: 2025 FOR, 2013 PB	GB: 2025 FOR, 2013 PB
# OA's	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759
Usually Resident Population	64	62	64	62	65	63	67	65	69	67	69	67
Private Households	27	26	27	26	27	26	28	28	30	29	30	29
Audio-Visual Goods	704	703	681	680	687	687	966	966	1,219	1,221	1,272	1,274
Gardens, plants and flowers	130	130	118	118	123	123	132	132	138	138	139	139
Recreational goods	1,318	1,318	1,372	1,372	1,426	1,426	1,698	1,701	2,018	2,025	2,086	2,093
Durables for indoor/outdoor recreation	311	307	308	304	311	307	329	325	369	366	377	374
Games, toys and hobbies	654	656	710	713	769	772	994	998	1,233	1,240	1,285	1,292
Sports goods	104	104	106	107	107	107	125	125	149	150	154	155
Pets and related products	249	251	247	249	239	241	251	253	267	269	269	272
Books	112	113	107	107	103	103	92	93	89	89	88	88
Recreational and Cultural Services	1,334	1,330	1,357	1,353	1,389	1,386	1,478	1,476	1,626	1,626	1,652	1,652
Restaurants	2,830	2,802	2,875	2,848	3,006	2,979	3,029	3,006	3,136	3,116	3,142	3,122
Hotels	274	279	294	298	331	336	448	455	557	566	574	583
Hair and Personal Grooming	215	213	219	216	224	221	236	233	243	241	243	241
Total Leisure Spend	6,918	6,888	7,022	6,993	7,290	7,262	8,079	8,064	9,027	9,021	9,196	9,192
Leisure Goods	2,264	2,264	2,277	2,278	2,339	2,340	2,888	2,893	3,464	3,473	3,584	3,594
Leisure Services	4,653	4,624	4,744	4,715	4,951	4,922	5,191	5,171	5,563	5,549	5,611	5,598

OTHER EXPENDITURE	UK: 2012 EST, 2012 PB	GB: 2012 EST, 2012 PB	UK: 2013 EST, 2013 PB	GB: 2013 EST, 2013 PB	UK: 2014 EST, 2014 PB	GB: 2014 EST, 2014 PB	UK: 2019 FOR, 2013 PB	GB: 2019 FOR, 2013 PB	UK: 2024 FOR, 2013 PB	GB: 2024 FOR, 2013 PB	UK: 2025 FOR, 2013 PB	GB: 2025 FOR, 2013 PB
# OA's	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759
Usually Resident Population	64	62	64	62	65	63	67	65	69	67	69	67
Private Households	27	26	27	26	27	26	28	28	30	29	30	29
Owner-Occupier Rents (Imputed Rents)	5,692	5,753	5,779	5,840	5,955	6,019	5,937	6,006	6,061	6,136	6,074	6,149
Actual Rents	2,016	2,038	2,094	2,116	2,203	2,227	2,280	2,306	2,501	2,532	2,545	2,577
Telephone and fax services	712	712	751	752	798	799	862	864	959	962	981	984
Education	548	550	622	624	680	683	635	638	637	640	635	639
Domestic service and household services	233	234	248	249	269	270	271	272	280	281	281	282
Housing R&M services	52	53	59	59	63	64	69	70	70	71	70	71
Insurance	781	782	865	866	847	849	789	791	756	759	749	752
Financial services	1,067	1,084	1,120	1,138	1,260	1,281	1,230	1,251	1,353	1,377	1,380	1,404
Vehicle Fuels and lubricants	1,154	1,139	1,110	1,096	1,035	1,023	1,017	1,006	1,000	991	996	987
Transport services	1,394	1,395	1,507	1,508	1,586	1,587	1,657	1,660	1,781	1,786	1,803	1,809
Electricity, Gas and Other fuels	1,213	1,199	1,281	1,266	1,249	1,235	1,159	1,148	1,123	1,113	1,116	1,107

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Consumer Retail Expenditure Person (£ Per Annum, EST=Estimates, FOR=Forecast, PB=Price Base)

CONSUMER EXPENDITURE	UK: 2012 EST, 2012 PB	GB: 2012 EST, 2012 PB	UK: 2013 EST, 2013 PB	GB: 2013 EST, 2013 PB	UK: 2014 EST, 2014 PB	GB: 2014 EST, 2014 PB	UK: 2019 FOR, 2013 PB	GB: 2019 FOR, 2013 PB	UK: 2024 FOR, 2013 PB	GB: 2024 FOR, 2013 PB	UK: 2025 FOR, 2013 PB	GB: 2025 FOR, 2013 PB
# OA's	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759
Usually Resident Population	64	62	64	62	65	63	67	65	69	67	69	67
Private Households	27	26	27	26	27	26	28	28	30	29	30	29
Food	1,406	1,406	1,467	1,467	1,479	1,479	1,533	1,534	1,617	1,619	1,633	1,636
Alcoholic Drink	255	256	259	259	293	293	245	245	245	245	244	245
Tobacco	176	172	177	174	176	173	145	143	136	134	134	132
Books Newspapers Magazines	109	109	105	105	102	102	85	85	81	81	80	80
Books	47	47	45	45	43	44	39	39	38	38	38	38
Newspapers and Magazines	62	61	60	60	59	58	45	45	43	42	42	42
Clothing and Footwear	846	831	901	885	944	927	1,200	1,181	1,477	1,455	1,536	1,513
Footwear	126	123	131	129	140	137	185	181	225	221	233	229
Clothing	720	708	769	756	803	790	1,015	1,000	1,252	1,234	1,303	1,284
Furniture/Floor/Textiles	356	358	375	378	394	396	437	440	489	492	500	503
Furniture/Floor Coverings	266	268	280	282	294	296	313	316	343	347	350	353
HH Textiles/Soft Furnishings	90	90	96	96	100	100	124	124	145	146	150	150
Audio-visual Equipment	406	407	402	403	414	416	557	559	695	698	725	728
Domestic Appliances	101	102	106	107	115	116	135	137	158	160	163	165
AV/Photo/Optical Goods	295	295	286	286	289	290	411	411	524	526	549	550
Telephone/Fax Equipment	9	9	10	9	10	10	11	11	13	13	13	13
Hardware and DIY Supplies	201	201	202	203	213	213	232	232	251	252	255	256
China Glass and Utensils	75	75	79	79	83	83	94	94	105	105	107	107
Repair/Maintenance Materials	18	18	19	19	20	20	24	24	27	27	27	27
Tools/Equip for Home/Garden	53	53	54	55	58	58	58	58	61	61	61	62
Gardens/Plants/Flowers	54	55	49	49	52	52	56	56	59	59	60	60
Other Goods	1,293	1,292	1,370	1,369	1,463	1,463	1,706	1,707	1,999	2,001	2,062	2,064
Chemists' Goods	426	426	454	454	487	487	564	565	654	655	672	673
Jewellery/Watches/Clocks	106	107	116	117	132	133	141	142	150	152	152	154
Non-durable HH Goods	65	65	67	67	68	68	73	73	78	79	79	80
Bicycles	25	25	23	23	23	24	30	31	36	37	37	38
Recreational Goods	553	554	576	578	600	602	722	724	868	871	900	904
Other Miscellaneous Goods	119	116	133	130	153	149	177	173	213	208	221	216
Total Goods	5,047	5,032	5,258	5,242	5,477	5,462	6,139	6,127	6,990	6,978	7,170	7,158
Convenience Goods	1,963	1,960	2,030	2,027	2,074	2,071	2,041	2,041	2,118	2,119	2,134	2,135
Comparison Goods	3,084	3,073	3,228	3,216	3,403	3,390	4,098	4,086	4,872	4,859	5,036	5,024
Bulky Goods	367	370	386	389	409	412	448	453	502	507	513	518
DIY Related Goods	168	169	168	169	176	177	188	189	201	202	204	205

Pitney Bowes Software

LEISURE EXPENDITURE	UK: 2012 EST, 2012 PB	GB: 2012 EST, 2012 PB	UK: 2013 EST, 2013 PB	GB: 2013 EST, 2013 PB	UK: 2014 EST, 2014 PB	GB: 2014 EST, 2014 PB	UK: 2019 FOR, 2013 PB	GB: 2019 FOR, 2013 PB	UK: 2024 FOR, 2013 PB	GB: 2024 FOR, 2013 PB	UK: 2025 FOR, 2013 PB	GB: 2025 FOR, 2013 PB
# OA's	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759
Usually Resident Population	64	62	64	62	65	63	67	65	69	67	69	67
Private Households	27	26	27	26	27	26	28	28	30	29	30	29
Audio-Visual Goods	295	295	286	286	289	290	411	411	524	526	549	550
Gardens, plants and flowers	54	55	49	49	52	52	56	56	59	59	60	60
Recreational goods	553	554	576	578	600	602	722	724	868	871	900	904
Durables for indoor/outdoor recreation	130	129	129	128	131	129	140	138	159	157	163	161
Games, toys and hobbies	274	275	298	300	324	325	422	425	530	534	555	558
Sports goods	44	44	45	45	45	45	53	53	64	65	67	67
Pets and related products	105	106	104	105	101	102	106	108	115	116	116	117
Books	47	47	45	45	43	44	39	39	38	38	38	38
Recreational and Cultural Services	559	559	570	570	585	584	628	629	699	700	713	713
Restaurants	1,186	1,177	1,208	1,199	1,265	1,256	1,288	1,280	1,348	1,341	1,355	1,348
Hotels	115	117	123	126	139	142	190	194	240	244	248	252
Hair and Personal Grooming	90	89	92	91	94	93	100	99	105	104	105	104
Total Leisure Spend	2,900	2,893	2,950	2,944	3,068	3,062	3,434	3,433	3,881	3,883	3,967	3,970
Leisure Goods	949	951	957	959	984	987	1,228	1,232	1,489	1,495	1,546	1,552
Leisure Services	1,951	1,942	1,993	1,985	2,084	2,076	2,207	2,202	2,392	2,388	2,421	2,418

OTHER EXPENDITURE	UK: 2012 EST, 2012 PB	GB: 2012 EST, 2012 PB	UK: 2013 EST, 2013 PB	GB: 2013 EST, 2013 PB	UK: 2014 EST, 2014 PB	GB: 2014 EST, 2014 PB	UK: 2019 FOR, 2013 PB	GB: 2019 FOR, 2013 PB	UK: 2024 FOR, 2013 PB	GB: 2024 FOR, 2013 PB	UK: 2025 FOR, 2013 PB	GB: 2025 FOR, 2013 PB
# OA's	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759	2,32,296	2,27,759
Usually Resident Population	64	62	64	62	65	63	67	65	69	67	69	67
Private Households	27	26	27	26	27	26	28	28	30	29	30	29
Owner-Occupier Rents (Imputed Rents)	2,386	2,416	2,428	2,459	2,506	2,538	2,524	2,557	2,606	2,641	2,620	2,656
Actual Rents	845	856	880	891	927	939	969	982	1,075	1,090	1,098	1,113
Telephone and fax services	298	299	316	317	336	337	367	368	412	414	423	425
Education	230	231	261	263	286	288	270	272	274	276	274	276
Domestic service and household services	98	98	104	105	113	114	115	116	120	121	121	122
Housing R&M services	22	22	25	25	27	27	29	30	30	30	30	31
Insurance	327	329	363	365	356	358	335	337	325	327	323	325
Financial services	447	455	471	479	530	540	523	533	582	593	595	607
Vehicle Fuels and lubricants	484	478	466	461	436	431	432	428	430	426	430	426
Transport services	584	586	633	635	668	669	704	707	766	769	778	781
Electricity, Gas and Other fuels	508	503	538	533	526	521	493	489	483	479	482	478

AECOM



Ballymun Retail Study 2016 Final Report

Prepared on behalf of Dublin City Council



The top left corner of the page features three thin, black lines that intersect to form a triangular shape. One line is horizontal, another is vertical, and the third is diagonal, creating a simple geometric design.

Appendix 5a Report of Consultations

05a

Appendix 5a: Report of Consultations

1.0 Introduction

As well as continuous discussions with Council officials, the consultation process for the preparation of this Retail Strategy involved the following:

- Household shopper survey of 400 households in the Ballymun area
- Presentations to the North West Area Committee (NWAC)
- Presentations to the Civic Alliance
- Workshop with the Ballymun for Business (B4B) group
- One to one semi-structured interviews with key stakeholders in the retail and business sector

The latter included:

- Manager of Ballymun Shopping Centre
- Manager of Charlestown Shopping Centre
- Manager of OMNI Shopping Centre and Retail Park
- Manager of IKEA
- Manager of Axis Theatre
- Lisney Commercial Property Agents

2.0 Key findings of consultations

(i) Household shopper survey, Sep-Oct 2015

This is detailed in Section 4.0 of the Retail Strategy but the most significant findings related to:

- evidence of low retail spending power in Ballymun households;
- high leakage of retail expenditure from area; and a
- desire by residents for more shopping development.

(ii) Workshop with the Ballymun for Business (B4B) group, 10th September 2015

Participants were probed on the strengths, weaknesses and opportunities in Ballymun and the output is enclosed as a separate note in this appendix. Overall, the feedback provided an important snapshot of the views of the business community in Ballymun.

(iii) Presentations to the North West Area Committee (NWAC), 20th October 2015 & 15th December 2015

While welcoming the Preliminary findings of the Retail Study in October 2015 initial feedback also centred on a number of matters requiring further research. These generally included issues pertaining to: rents and rates; car parking; the availability of development land in Ballymun; and the

role of non-retail uses in generating footfall in Ballymun. These matters were addressed in the draft version presented to NWAC in December 2015.

Presentation of the Retail Study's draft proposals in December 2015 elicited concerns that the low retail floorspace projections may serve as a constraint to retail development. Mindful of the fact that these figures only constitute broad guidance on floorspace capacity, as per national guidance, it was agreed that a qualifying note should be inserted in the document to highlight that the floorspace capacity figures shall not serve as floorspace caps.

(iv) Presentation to the Civic Alliance, 20th October 2015 & 28th January 2016

The Civic Alliance was equally positive in its response to the preliminary proposals in this Retail Study in October. Feedback at this session generally concentrated on interrogating the results of the household shopper survey and the methodology used to carry it out.

At the January presentation the same concerns were expressed about the low retail floorspace capacity findings and again it was decided to underline within the document that these were for broad guidance purposes only.

Attention was also drawn to an expression of interest in developing a site immediately north of the former shopping centre for a discount foodstore and a number of other units. It was considered that development here would not contravene the recommendations of the Retail Study for a number of reasons. It is located within the main Commercial node of Ballymun and its size accords with the lower end of the floorspace capacity identified in the Study. Also, it satisfies the sequential test outlined in national guidance in that it is the next preferred site for retail development given that the former shopping centre site will not become available for redevelopment for at least three years.

(v) Manager of Ballymun Shopping Centre

A valuable insight was obtained into the reasons for the demise of Ballymun Shopping Centre and the track record of businesses that operated there. The latter discussions helped cast light on what could realistically resurface within a new retail scheme for Ballymun.

(vi) Managers of Charlestown & OMNI Shopping Centres

The benefit of interviewing the managers of all the Shopping Centres was their corroboration of the survey findings for Ballymun. Significantly, among all the managers, there was universal

acknowledgement that there was low purchasing power in Ballymun because of its socio-economic profile.

The centre managers also helped verify the health of these centres in terms of vacancy levels, rental levels and footfall levels. Furthermore, they provided useful insights into retail operations on the ground and the micro factors involved in influencing shopper behaviour, for example, peak times correlating with school runs.

(vii) Manager of IKEA

Again, discussions with IKEA elicited extremely useful information on the health of the store and the extent of its catchment. Our surveys suggested that approximately 72% of its customer numbers came from the Greater Dublin Area and this finding roughly accorded with the 80 per cent figure stated by IKEA.

Discussions with IKEA shed light on the employment contribution that it makes to the Ballymun area and the limited appeal it has for joint promotional marketing with other businesses in Ballymun.

(viii) Lisney Commercial Property Agents

Discussions with Lisney indicated that the retail market in the suburbs was still challenging. The best prospects for occupancy of vacant units on Main Street Ballymun were connected with detenanting of businesses from Ballymun Shopping Centre. Conversations also confirmed that there would be little developer interest in seeking to re-establish a mall-like shopping centre in Ballymun.

(ix) Manager of Axis Theatre

This consultation was useful in gaining an understanding of the role played by non-retail businesses in drawing people into Ballymun. Evidence was obtained on the numbers attracted to the facilities at Axis and the potential that events and festivals possessed for bolstering trade in the District Centre.

(x) Dublin City University (DCU)

Comments from DCU clarified that 16,000 students, including new students from St Pat's and MDI campuses, attend the university.

The main university building in the Ballymun area is DCU in the Community, which acts as a bridge between the university and the local community.

Its mission is "To provide educational opportunities to local people in North Dublin in order to increase participation levels and to promote equality in third level education". Its aim is to broaden access and increase participation in higher education. DCU in the Community recognises the

individual talent of each student and offers a flexible curriculum based on their needs and aspirations, and acts as a 'drop in centre' for all local learners seeking information and advice in relation to accessing further education options. It seeks to promote Sustainable Community development and serve as a bridge between the resources of DCU (and the wider higher education system) and the local Community (see www.dcu.ie).



Figure 1 – University College Dublin – Ballymun Office

According to the university, the student accommodation it provides is located in the area outside Ballymun and includes:

- 1108 bedrooms on DCU Campus in Glasnevin;
- 250 bedrooms in DCU St. Pat's;
- 100 bedrooms in DCU All Hallows.

While DCU does not have its own student accommodation in Ballymun there are other blocks of student accommodation operated privately in the area. These include:

- Shanowen Hall - 55 Apartments, made up of 4/5 bedrooms;
- Shanowen Square - 338 Bedrooms;
- Hazelwood Apartments – Approx. 200 Bedrooms;
- Gateway Ballymun - 350 Bedrooms.

Mindful of the latter figures it is clear that there is accommodation in the general area of Ballymun for over 1,000 students, with those residing in the Gateway complex most likely to contribute to the shopping fortunes of the area.

3.0 Conclusion

Overall, participation in the consultation process by the public, elected representatives, business organisations and the retail sector was instrumental in highlighting what could and could not be achieved under this Retail Study for Ballymun.



Appendix 5b B4B Meeting Note

05b

Project: **Ballymun Retail Strategy**

Job No: **47075686**

Subject: **Ballymun Business Network Draft Meeting Notes**

Prepared by: **Laura Michael**

Date: **Meeting on 10th September 2015**

Checked by: **Una Somerville**

Date: **15th September 2015**

Approved by: **Una Somerville**

Date: **18th September 2015**

1. Aecom provided a powerpoint presentation of the scope, survey methodology, consultation strategy and timeframe for the Ballymun Retail Strategy.

Table 1 Theme	Current Vision	Future Vision
Atmosphere	Grey Dire Bleak Dull Terrible Grim	Vibrant Exciting Thriving Busy
Amenities	No Diversity Empty Lacking Sparse Inadequate	Employment Opportunity Local Value Diverse Relevant Creative
Accessibility	Inconvenient Challenging	Untapped

2. Aecom then suggested the attendees break into two groups and both individually and collectively list three separate words that describe Ballymun Retail scene currently and as people/groups would like to see it in the future. Table 1 is a summary of the individuals' commentary

3. After the formal presentation – two representations were made directly to Aecom raising concerns over the shopping centre and how it has been handled. Issues of poor morale and communication were identified. Also the decision making processes of decant and

relocation, moving the market etc were cited as legacy issues that need to be addressed.

4. Summary comments from the two groups:

Current vision:

- Fantastic location
- Reputation of area/stigma/perception
- Concentration of retail facilities
- Lack of secure parking
- Lack of parking for shops
- No focal point
- Just a thoroughfare
- Weekends quiet
- Community story

Future vision:

- Tapping into the airport
- Employment & Income are key
- People want a variety of opportunities on their doorstep
- Outlet Centre
- Ikea – where are shoppers coming from – can we tap into them?
- Lure of M50/Metro opportunities of transportation links
- Glasnevin/area to tap into.

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