

APPENDIX 6a

Methodology for Estimating Existing
(2007) Retail Floorspace Stock

Review and Update of the 2001 Greater Dublin Area (GDA) Retail Strategy

Methodology for Estimating Existing (September 2007) Retail Floorspace Stock and Retail Development Pipeline within the GDA

The retail floorspace in the quantitative need assessment is categorised into convenience goods, non-bulky comparison goods and bulky comparison goods/retail warehousing using the definitions set out in **Table 1**.

Table 1: Use Category Definitions

Convenience	Food Alcoholic and non alcoholic beverages Tobacco Non-durable household goods
Non-bulky Comparison	Clothing and footwear Furniture, furnishings and household equipment (excluding non-durable household goods) Medical and pharmaceutical products, therapeutic appliances and equipment Educational and recreation equipment and accessories Books, newspapers and magazines Goods for personal care and goods not elsewhere classified The value of repairs is excluded in all cases.
Bulky Comparison	Goods generally sold from retail warehouses where DIY goods or goods such as flatpack furniture are of such a size that they would normally be taken away by car and not be manageable by customers travelling by foot, cycle or bus, or that large floor areas would be required to display them e.g. furniture in room sets, or not large individually, but part of a collective purchase which would be bulky e.g. wallpaper, paint.

Source: Retail Planning: Guidelines for Planning Authorities, Annex 1, January 2005

The floorspace data relates to properties in 'retail use' only, meaning services normally found on the high street (such as banks, post offices, hairdressers, travel agents and cafes) are excluded. Also excluded are car showrooms.

In order to calculate the existing (September 2007) retail floorspace in the GDA, the retail floorspace data generated by DTZ Piedad Consulting for 2001¹ is used as a start point and baseline. Each Council within the GDA then provided details of retail planning applications that had received planning consent since 2001. Information for each application included the amount of floorspace by type, location and status (i.e. permission, under construction or built). The floorspace of each application was then reduced by 20% in order to exclude service uses, which (based on Goad retail floorspace statistics) typically account for this proportion of space in most new developments and existing centres in the GDA. Only schemes that had been completed were included at this point. The addition of the DTZ Piedad Consulting (2001) baseline retail floorspace totals and completions (excluding services) between 2001-07 provide the estimates of the current (September 2007) retail goods floorspace stock by centre, Council area and for the GDA as a whole.

Schemes that are cited by the Councils as being under construction, and/or with planning consent but not yet built, as at September 2007, are defined as retail floorspace in the 'pipeline'. Service use floorspace has again been excluded by assuming an across the board reduction of 20%. In practice, the retail development pipeline at the time of the publication of this Update GDA Retail Strategy is likely to be larger than that presented, since the Councils are likely to have given consent to a number of additional schemes. It is also worth noting that the 'pipeline' does not include retail proposals.

Spreadsheets have been created for each county. These tables summarise by centre and broad retail goods category the retail goods floorspace supply in 2001, the amount of new floorspace built between 2001 and September 2007, the existing retail floorspace stock and lastly, the quantum of retail floorspace in the pipeline. The total amount of retail floorspace (existing (2007) shopping floorspace, plus pipeline) is also given.

For those applications where the floorspace division between convenience goods and non-bulky comparison goods was not provided by the Councils, a 50/50 split has been assumed.

In converting the gross floorspace data provided by the Councils in the planning applications to net retail floorspace (sales space) the following ratios have been adopted.

Convenience Goods – 66:100 net to gross
Non-bulky Comparison Goods – 66:100 net to gross
Bulky Comparison Goods – 90:100 net to gross

The ratios for non-bulky and bulky comparison goods are in line with those used by DTZ Piedad Consulting in 2001. The ratio for convenience goods is the same as for non-bulky comparison goods and reflects the floorspace mix in modern, larger format supermarkets and superstores.

¹ DTZ Piedad Consulting, GDA Retail Planning Strategy, Working Paper 4, Retail Floorspace Analysis, Appendix 1