

APPENDIX 7c

The Need for Additional
Convenience Goods Floorspace

**RETAIL FLOORSPACE NEED ASSESSMENT: CONVENIENCE GOODS
(INCORPORATING ESTIMATES OF (ANY) UNDER / OVER TRADING AT THE BASE YEAR, 2007)**

CONTENTS

Table 1	<u>Population Change By Zone, County And Region</u>
Table 2	<u>Expenditure On Convenience Goods Per Head Of Population By Zone, County And Region (Including Expenditure By Special Forms Of Trading)</u>
Table 3	<u>Expenditure On Convenience Goods Per Head Of Population By Zone, County And Region (Excluding Expenditure By Special Forms Of Trading)</u>
Table 4	<u>Total Available Convenience Goods Expenditure By Zone, County And Region (Excluding Expenditure By Special Forms Of Trading)</u>
Table 5	<u>Unadjusted Convenience Goods Centre Market Shares By Zone, County And Region In The Base Year, 2007 (Column Percent)</u>
Table 6	<u>Estimated Convenience Goods Expenditure Pattern And Centre Turnover Estimates In The Base Year, 2007 (€ Million)</u>
Table 7	<u>Adjusted Convenience Goods Centre Market Shares By Zone, County And Region (Column Percent)</u>
Table 8	<u>Convenience Goods Expenditure Pattern And Centre Turnover Estimates, 2016 (€ Million)</u>
Table 9	<u>Calculation Of Potential Convenience Goods Headroom Expenditure, 2016 (€ Million)</u>
Table 10	<u>Need For Additional Convenience Goods Floorspace at 2016</u>

TABLE 1 - POPULATION CHANGE BY ZONE, COUNTY AND REGION

Region	County	Zone	2006 Population	2007 Population (Base Year)	2016 Population	Total Increase (2006-2016)	Percentage Increase (2006-2016)	Total Increase (2007-2016)	Percentage Increase (2007-2016)
Dublin	Dublin City	Zone 1 Dublin City Centre	108,020	110,830	136,116	28,096	26.0%	25,286	22.8%
		Zone 2 Dublin North West	110,624	111,472	119,101	8,477	7.7%	7,629	6.8%
		Zone 3 Dublin North East	136,972	137,910	146,356	9,384	6.9%	8,446	6.1%
		Zone 4 Dublin South East	68,019	69,008	77,913	9,894	14.5%	8,905	12.9%
		Zone 5 Dublin South West	82,576	83,144	88,257	5,681	6.9%	5,113	6.1%
	Fingal	Zone 6 Skerries	47,411	48,717	60,468	13,057	27.5%	11,751	24.1%
		Zone 7 Swords	101,607	105,416	139,696	38,089	37.5%	34,280	32.5%
		Zone 8 Blanchardstown	90,974	92,828	109,514	18,540	20.4%	16,686	18.0%
	South Dublin	Zone 9 Clondalkin	93,836	96,888	124,354	30,518	32.5%	27,466	28.3%
		Zone 10 Tallaght	95,223	96,245	105,443	10,220	10.7%	9,198	9.6%
		Zone 11 Rathfarnham	57,876	57,619	55,310	-2,566	-4.4%	-2,309	-4.0%
	Dun Laoghaire-Rathdown	Zone 12 Dundrum	86,877	88,110	99,207	12,330	14.2%	11,097	12.6%
		Zone 13 Dun Laoghaire	107,161	108,760	123,146	15,985	14.9%	14,387	13.2%
SUB TOTAL DUBLIN			1,187,176	1,206,947	1,384,881	197,705	16.7%	177,935	14.7%
Mid East	Meath	Zone 14 Kells	23,327	23,504	25,095	1,768	7.6%	1,591	6.8%
		Zone 15 Navan	106,425	108,769	129,869	23,444	22.0%	21,100	19.4%
		Zone 16 Trim	33,079	33,651	38,801	5,722	17.3%	5,150	15.3%
	Kildare	Zone 17 Naas	102,647	104,342	119,597	16,950	16.5%	15,255	14.6%
		Zone 18 Kildare	53,874	55,181	66,946	13,072	24.3%	11,765	21.3%
		Zone 19 Athy	29,814	30,248	34,149	4,335	14.5%	3,902	12.9%
	Wicklow	Zone 20 Blessington	16,992	17,540	22,473	5,481	32.3%	4,933	28.1%
		Zone 21 Bray/Wicklow	81,409	84,377	111,087	29,678	36.5%	26,710	31.7%
		Zone 22 Arklow	27,793	28,388	33,741	5,948	21.4%	5,353	18.9%
SUB TOTAL MID EAST			475,360	486,000	581,758	106,398	22.4%	95,758	19.7%
GDA Hinterland	Louth	Zone 23 Louth	111,267	113,450	133,092	21,825	19.6%	19,643	17.3%
	Cavan and Monaghan	Zone 24 Cavan and Monaghan	120,000	122,354	143,537	23,537	19.6%	21,183	17.3%
	Longford and West Meath	Zone 25 Longford and West Meath	113,737	117,153	147,894	34,157	30.0%	30,741	26.2%
	Offaly and Laois	Zone 26 Offaly and Laois	137,927	140,847	167,126	29,199	21.2%	26,279	18.7%
	Carlow and Kilkenny	Zone 27 Carlow and Kilkenny	137,907	140,572	164,560	26,653	19.3%	23,988	17.1%
	Wexford	Zone 28 Wexford	131,749	135,148	165,739	33,990	25.8%	30,591	22.6%
SUB TOTAL GDA HINTERLAND			752,587	769,523	921,948	169,361	22.5%	152,425	19.8%
TOTAL (ALL ZONES, COUNTIES, REGIONS)			2,415,123	2,462,469	2,888,587	473,464	19.6%	426,118	17.3%

Notes:

Population totals at 2006 for each zone have been derived from the Census. Estimates for each zone for the end year of 2016 have been provided by the Councils and are consistent with RPG figures.
Zone population totals for 2007 (the base year) have been estimated by assuming a 'straight-line' rate of population change within each zone between 2006 and 2016, as agreed with the RPG Office.

TABLE 2 - EXPENDITURE ON CONVENIENCE GOODS PER HEAD OF POPULATION BY ZONE, COUNTY AND REGION (INCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)

Region	County	Zone	Expenditure Per Head (€) ⁽¹⁾						
			2006	2007 (Base Year)	2016	Total Increase (2006-2016)	Percentage Increase (2006-2016)	Total Increase (2007-2016)	Percentage Increase (2007-2016)
Dublin	Dublin City	Zone 1 Dublin City Centre	2,354	2,391	2,613	259	11.0%	222	9.3%
		Zone 2 Dublin North West	2,533	2,573	2,812	279	11.0%	239	9.3%
		Zone 3 Dublin North East	2,531	2,571	2,809	278	11.0%	238	9.3%
		Zone 4 Dublin South East	2,490	2,529	2,764	274	11.0%	234	9.3%
		Zone 5 Dublin South West	2,553	2,593	2,834	281	11.0%	240	9.3%
	Fingal	Zone 6 Skerries	2,513	2,553	2,789	276	11.0%	237	9.3%
		Zone 7 Swords	2,695	2,738	2,991	296	11.0%	254	9.3%
		Zone 8 Blanchardstown	2,734	2,777	3,035	301	11.0%	257	9.3%
	South Dublin	Zone 9 Clondalkin	2,695	2,738	2,991	296	11.0%	254	9.3%
		Zone 10 Tallaght	2,576	2,617	2,859	283	11.0%	243	9.3%
		Zone 11 Rathfarnham	2,668	2,710	2,961	293	11.0%	251	9.3%
	Dun Laoghaire-Rathdown	Zone 12 Dundrum	2,688	2,731	2,984	296	11.0%	253	9.3%
		Zone 13 Dun Laoghaire	2,672	2,714	2,966	294	11.0%	252	9.3%
Mid East	Meath	Zone 14 Kells	2,495	2,531	2,719	224	9.0%	188	7.4%
		Zone 15 Navan	2,534	2,571	2,761	227	9.0%	191	7.4%
		Zone 16 Trim	2,398	2,433	2,613	215	9.0%	180	7.4%
	Kildare	Zone 17 Naas	2,514	2,550	2,739	225	9.0%	189	7.4%
		Zone 18 Kildare	2,406	2,441	2,622	216	9.0%	181	7.4%
		Zone 19 Athy	2,444	2,479	2,663	219	9.0%	184	7.4%
	Wicklow	Zone 20 Blessington	2,534	2,571	2,761	227	9.0%	191	7.4%
		Zone 21 Bray/Wicklow	2,465	2,501	2,686	221	9.0%	185	7.4%
		Zone 22 Arklow	2,554	2,591	2,783	229	9.0%	192	7.4%
GDA Hinterland	Louth	Zone 23 Louth	2,388	2,421	2,581	193	8.1%	160	6.6%
	Cavan and Monaghan	Zone 24 Cavan and Monaghan	2,509	2,543	2,712	203	8.1%	168	6.6%
	Longford and West Meath	Zone 25 Longford and West Meath	2,451	2,485	2,649	198	8.1%	164	6.6%
	Offaly and Laois	Zone 26 Offaly and Laois	2,472	2,506	2,672	200	8.1%	166	6.6%
	Carlow and Kilkenny	Zone 27 Carlow and Kilkenny	2,499	2,533	2,701	202	8.1%	168	6.6%
	Wexford	Zone 28 Wexford	2,505	2,539	2,708	203	8.1%	168	6.6%

Notes:

(1) Average consumer expenditure per head on convenience goods for 2006 has been estimated by Experian for each zone. The 2006 expenditure per head figures in each zone have been projected forwards to 2007 (the base year) and the forecast year of 2016 by using regional expenditure per head growth rates produced by Experian for this update report (see Appendix 5)

TABLE 3 - EXPENDITURE ON CONVENIENCE GOODS PER HEAD OF POPULATION BY ZONE, COUNTY AND REGION (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)

Region	County	Zone	Expenditure Per Head (€) ⁽¹⁾						
			2006	2007 (Base Year)	2016	Total Increase (2006-2016)	Percentage Increase (2006-2016)	Total Increase (2007-2016)	Percentage Increase (2007-2016)
Dublin	Dublin City	Zone 1 Dublin City Centre	2,269	2,276	2,422	153	6.7%	146	6.4%
		Zone 2 Dublin North West	2,442	2,450	2,606	165	6.7%	157	6.4%
		Zone 3 Dublin North East	2,440	2,448	2,604	164	6.7%	157	6.4%
		Zone 4 Dublin South East	2,400	2,408	2,562	162	6.7%	154	6.4%
		Zone 5 Dublin South West	2,461	2,469	2,627	166	6.7%	158	6.4%
	Fingal	Zone 6 Skerries	2,423	2,430	2,586	163	6.7%	156	6.4%
		Zone 7 Swords	2,598	2,606	2,773	175	6.7%	167	6.4%
		Zone 8 Blanchardstown	2,636	2,644	2,813	178	6.7%	169	6.4%
	South Dublin	Zone 9 Clondalkin	2,598	2,606	2,773	175	6.7%	167	6.4%
		Zone 10 Tallaght	2,483	2,491	2,651	167	6.7%	159	6.4%
		Zone 11 Rathfarnham	2,572	2,580	2,745	173	6.7%	165	6.4%
	Dun Laoghaire-Rathdown	Zone 12 Dundrum	2,591	2,599	2,766	175	6.7%	166	6.4%
		Zone 13 Dun Laoghaire	2,576	2,584	2,749	174	6.7%	165	6.4%
Mid East	Meath	Zone 14 Kells	2,405	2,410	2,520	115	4.8%	111	4.6%
		Zone 15 Navan	2,443	2,447	2,560	117	4.8%	112	4.6%
		Zone 16 Trim	2,312	2,316	2,422	111	4.8%	106	4.6%
	Kildare	Zone 17 Naas	2,423	2,428	2,539	116	4.8%	111	4.6%
		Zone 18 Kildare	2,319	2,324	2,430	111	4.8%	107	4.6%
		Zone 19 Athy	2,356	2,360	2,469	113	4.8%	108	4.6%
	Wicklow	Zone 20 Blessington	2,443	2,447	2,560	117	4.8%	112	4.6%
		Zone 21 Bray/Wicklow	2,376	2,381	2,490	114	4.8%	109	4.6%
		Zone 22 Arklow	2,462	2,467	2,580	118	4.8%	113	4.6%
GDA Hinterland	Louth	Zone 23 Louth	2,302	2,305	2,393	91	3.9%	88	3.8%
	Cavan and Monaghan	Zone 24 Cavan and Monaghan	2,419	2,421	2,514	95	3.9%	93	3.8%
	Longford and West Meath	Zone 25 Longford and West Meath	2,363	2,365	2,456	93	3.9%	90	3.8%
	Offaly and Laois	Zone 26 Offaly and Laois	2,383	2,386	2,477	94	3.9%	91	3.8%
	Carlow and Kilkenny	Zone 27 Carlow and Kilkenny	2,409	2,412	2,504	95	3.9%	92	3.8%
	Wexford	Zone 28 Wexford	2,415	2,418	2,510	95	3.9%	92	3.8%

Notes:

(1) Expenditure per head on convenience goods has been discounted by 3.6% and 4.8% (over the figures in Table 2) for 2006 and the base year of 2007 respectively, to exclude non-store retail sales, which includes e-tailing. At 2016 a discount of 7.3% has been assumed over the figures in Table 2. The SFT percentages are derived from in-depth research carried out by Experian in the UK (see Appendix 5).

TABLE 4 - TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE ZONE, COUNTY AND REGION (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)

Region	County	Zone	Total Available Expenditure (€m) ⁽¹⁾			
			2007 (Base Year)	2016	Total Increase (2007-2016)	Percentage Increase (2007-2016)
Dublin	Dublin City	Zone 1 Dublin City Centre	252.3	329.7	77.4	30.7%
		Zone 2 Dublin North West	273.1	310.4	37.4	13.7%
		Zone 3 Dublin North East	337.6	381.2	43.6	12.9%
		Zone 4 Dublin South East	166.2	199.6	33.5	20.1%
		Zone 5 Dublin South West	205.3	231.8	26.6	12.9%
	Fingal	Zone 6 Skerries	118.4	156.4	38.0	32.1%
		Zone 7 Swords	274.7	387.4	112.6	41.0%
		Zone 8 Blanchardstown	245.4	308.1	62.7	25.5%
	South Dublin	Zone 9 Clondalkin	252.5	344.8	92.3	36.6%
		Zone 10 Tallaght	239.8	279.5	39.7	16.6%
		Zone 11 Rathfarnham	148.7	151.8	3.2	2.1%
	Dun Laoghaire-Rathdown	Zone 12 Dundrum	229.0	274.4	45.4	19.8%
		Zone 13 Dun Laoghaire	281.0	338.6	57.5	20.5%
SUB TOTAL DUBLIN			3023.9	3693.7	669.8	22.1%
Mid East	Meath	Zone 14 Kells	56.6	63.2	6.6	11.7%
		Zone 15 Navan	266.2	332.4	66.2	24.9%
		Zone 16 Trim	77.9	94.0	16.1	20.6%
	Kildare	Zone 17 Naas	253.3	303.7	50.4	19.9%
		Zone 18 Kildare	128.2	162.7	34.5	26.9%
		Zone 19 Athy	71.4	84.3	12.9	18.1%
	Wicklow	Zone 20 Blessington	42.9	57.5	14.6	34.0%
		Zone 21 Bray/Wicklow	200.9	276.6	75.7	37.7%
		Zone 22 Arklow	70.0	87.0	17.0	24.3%
SUB TOTAL MID EAST			1167.5	1461.5	294.0	25.2%
GDA Hinterland	Louth	Zone 23 Louth	261.5	318.4	57.0	21.8%
	Cavan and Monaghan	Zone 24 Cavan and Monaghan	296.3	360.8	64.6	21.8%
	Longford and West Meath	Zone 25 Longford and West Meath	277.1	363.2	86.1	31.1%
	Offaly and Laois	Zone 26 Offaly and Laois	336.0	413.9	77.9	23.2%
	Carlow and Kilkenny	Zone 27 Carlow and Kilkenny	339.0	412.0	73.0	21.5%
	Wexford	Zone 28 Wexford	326.7	416.0	89.3	27.3%
SUB TOTAL GDA HINTERLAND			1836.6	2284.4	447.8	24.4%
TOTAL (ALL ZONES, COUNTIES, REGIONS)			6028.1	7439.7	1411.6	23.4%

Notes:

(1) Total available expenditure totals for convenience goods are calculated as follows: Population (Table 1) multiplied by consumer expenditure per head after making appropriate reductions for SFT (Table 3).

TABLE 5 - UNADJUSTED CONVENIENCE GOODS CENTRE MARKET SHARES BY ZONE, COUNTY AND REGION IN THE BASE YEAR, 2007 (COLUMN PERCENT)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone, County and Region)																													
	Dublin													Mid East							GDA Hinterland									
	Dublin City				Dublin Fingal				South Dublin			Dublin Dun Laoghaire-Rathdown		Meath			Kildare				Wicklow			Louth	Cavan and Monaghan	Longford and West Meath	Offaly and Laois	Carlow and Kilkenny	Wexford	
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	Zone 19	Zone 20	Zone 21	Zone 22	Zone 23	Zone 24	Zone 25	Zone 26	Zone 27	Zone 28		
WITHIN GDA																														
Dublin City Centre - Metropolitan Centre	58.6	4.4	3.4	6.6	3.3	0.6	0.0	0.0	0.4	0.6	2.8	0.6	0.0	0.1	0.5	3.0	6.6	1.2	1.4	4.4	0.1	0.0	0.0	0.0	0.0	1.9	0.0	4.6	0.0	
Others	30.3	86.0	80.6	61.3	68.0	5.6	12.4	1.5	3.5	2.7	24.2	3.0	0.0	0.0	0.2	1.2	1.1	2.1	5.1	4.5	0.0	0.0	0.1	7.9	0.0	0.4	3.9	0.0		
SUB TOTAL: DUBLIN CITY COUNTY	88.9	90.4	84.0	67.8	71.3	6.2	12.4	1.5	3.9	3.3	27.0	3.6	0.0	0.1	0.7	4.2	7.7	3.3	6.5	8.9	0.1	0.0	0.1	7.9	1.9	0.4	8.5	0.0		
Swords - Major Town Centre	0.0	1.0	1.0	0.0	1.3	32.9	49.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.0	4.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Blanchardstown - Major Town Centre	2.0	5.0	0.0	0.0	1.7	1.2	2.7	76.8	2.8	1.0	0.4	0.0	0.0	0.0	7.1	0.2	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Others	0.5	0.4	4.4	0.0	0.0	46.8	23.0	20.6	0.0	0.2	0.9	0.8	0.0	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
SUB TOTAL: FINGAL COUNTY	2.5	6.3	5.4	0.0	3.0	80.9	75.2	97.3	2.8	1.1	1.3	0.8	0.0	0.0	8.9	0.2	0.0	4.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Liffey Valley - Major Town Centre	1.8	0.0	0.3	0.0	1.2	0.0	0.0	0.0	0.1	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Tallaght - Major Town Centre	0.3	0.0	3.6	0.4	6.4	0.0	0.0	0.0	0.0	45.8	3.5	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	6.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Others	2.6	0.9	0.0	5.3	16.2	0.0	1.2	0.0	91.8	42.8	51.9	9.4	0.4	0.0	0.0	2.9	4.0	1.5	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.2	1.0	
SUB TOTAL: SOUTH DUBLIN COUNTY	4.6	0.9	3.9	5.7	23.8	0.0	1.2	0.0	91.9	88.7	55.5	9.4	0.8	0.0	0.0	2.9	4.0	1.5	1.5	6.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.2	1.0	
Dundrum - Major Town Centre	0.3	1.5	3.9	9.6	0.7	0.0	0.0	0.0	0.0	2.0	6.9	35.6	8.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.9	0.0	0.7	0.0	0.0	1.6	0.0	0.0	0.0	
Dun Laoghaire - Major Town Centre	0.0	0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.8	21.6	0.0	0.0	0.4	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Others	2.7	0.0	0.0	4.8	0.4	0.2	0.0	0.2	0.2	1.4	6.5	46.5	63.4	0.0	0.0	0.2	0.0	5.2	0.0	0.0	12.4	0.0	0.8	0.8	0.0	0.2	0.0	0.0	0.0	
SUB TOTAL: DLR COUNTY	3.1	1.5	3.9	15.4	1.1	0.2	0.0	0.2	0.2	3.5	13.3	82.8	93.8	0.0	0.0	0.6	0.0	5.2	0.2	0.0	14.3	0.0	1.5	0.8	0.0	1.8	0.0	0.0	0.0	
Navan - County Town Centre	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	34.4	35.3	16.4	1.4	1.2	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Others	0.0	0.8	0.0	0.0	0.0	1.8	0.0	0.0	0.2	0.0	0.5	0.6	0.0	34.6	36.9	49.3	0.2	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.2	0.0	0.0	0.0	
SUB TOTAL: MEATH COUNTY	0.1	0.8	0.0	0.0	0.0	1.8	0.0	0.0	0.2	0.3	0.5	0.6	0.0	69.0	72.2	65.8	1.6	1.2	0.6	0.0	0.0	0.1	0.0	0.0	0.0	0.2	0.0	0.0	0.0	
Naas/Newbridge/Kilcullen - County Town Centre	0.0	0.0	0.0	0.0	0.0	2.1	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.2	0.0	8.3	55.2	65.3	32.8	17.4	0.0	0.0	0.0	0.0	0.0	0.0	3.9	0.0	0.0	
Leixlip/Maynooth/Celbridge - Town and/or District Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.5	0.0	0.0	0.0	0.0	0.5	14.5	23.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Others	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.2	14.7	18.2	0.0	0.0	0.0	0.0	2.3	0.0	0.0	0.0	0.0	0.0	
SUB TOTAL: KILDARE COUNTY	0.0	0.0	0.0	0.0	0.0	2.1	0.0	0.0	0.9	0.8	0.0	0.0	0.0	0.2	0.5	22.9	85.4	80.3	51.0	17.4	0.0	0.0	0.0	2.3	0.0	3.9	0.0	0.0	0.0	
Bray - Major Town Centre	0.0	0.0	0.0	0.0	0.0	4.2	2.8	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	35.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Wicklow - County Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	
Others	0.0	0.0	0.0	0.6	0.0	0.6	3.4	0.0	0.0	0.0	0.0	0.0	0.2	1.8	1.7	0.0	0.2	0.0	0.0	49.2	39.1	96.2	0.0	0.0	0.0	0.1	0.0	0.6	0.6	
SUB TOTAL: WICKLOW COUNTY	0.0	0.0	0.0	0.6	0.0	4.8	6.2	0.0	0.0	0.0	0.0	0.0	0.7	1.8	1.7	0.0	0.2	0.0	0.0	49.2	83.6	96.4	0.0	0.0	0.0	0.1	0.0	0.9	0.9	
SUB TOTAL: GDA	99.3	99.9	97.2	89.5	99.2	95.9	95.0	99.0	100.0	97.8	97.7	97.3	95.3	71.0	84.0	96.5	98.9	95.4	59.8	82.4	98.1	96.5	1.6	11.0	1.9	6.4	13.8	1.9	1.9	
OUTSIDE GDA																														
All Centres / Stores	0.7	0.1	2.8	10.5	0.8	4.1	5.0	1.0	0.0	2.2	2.3	2.7	4.7	29.0	16.0	3.5	1.1	4.6	40.2	17.6	1.9	3.5	98.4	89.0	98.1	93.6	86.2	98.1	98.1	
SUB TOTAL OUTSIDE GDA	0.7	0.1	2.8	10.5	0.8	4.1	5.0	1.0	0.0	2.2	2.3	2.7	4.7	29.0	16.0	3.5	1.1	4.6	40.2	17.6	1.9	3.5	98.4	89.0	98.1	93.6	86.2	98.1	98.1	
TOTAL (FOR HOUSEHOLD SURVEY AREA)	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Notes:

The market share percentages are derived by combining the results of a large-scale household telephone survey of the GDA and its hinterland and the results of a street-based young persons survey carried out in Dublin City Centre and at Dundrum (see Appendix 3).

TABLE 7 - ADJUSTED CONVENIENCE GOODS CENTRE MARKET SHARES BY ZONE, COUNTY AND REGION (COLUMN PERCENT)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone, County and Region)																												
	Dublin													Mid East							GDA Hinterland								
	Dublin City				Dublin Fingal				South Dublin			Dublin Dun Laoghaire-Rathdown		Meath			Kildare				Wicklow			Louth	Cavan and Monaghan	Longford and West Meath	Offaly and Laois	Carlow and Kilkenny	Wexford
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	Zone 19	Zone 20	Zone 21	Zone 22	Zone 23	Zone 24	Zone 25	Zone 26	Zone 27	Zone 28	
WITHIN GDA																													
Dublin City Centre - Metropolitan Centre	58.9	4.4	3.8	7.0	3.4	0.6	0.0	0.0	0.4	0.6	2.8	0.6	0.0	0.1	0.5	3.0	6.6	1.2	1.4	4.4	0.1	0.0	0.0	0.0	0.0	1.9	0.0	4.6	0.0
Others	30.5	86.1	82.1	67.9	68.4	5.6	12.4	1.5	3.5	2.7	24.2	3.0	0.0	0.0	0.2	1.2	1.1	2.1	5.1	4.5	0.0	0.0	0.1	7.9	0.0	0.4	3.9	0.0	
SUB TOTAL: DUBLIN CITY COUNTY	89.4	90.5	85.9	74.9	71.8	6.2	12.4	1.5	3.9	3.3	27.0	3.6	0.0	0.1	0.7	4.2	7.7	3.3	6.5	8.9	0.1	0.0	0.1	7.9	1.9	0.4	8.5	0.0	
Swords - Major Town Centre	0.0	1.0	1.0	0.0	1.3	34.1	51.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.0	4.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Blanchardstown - Major Town Centre	2.0	5.0	0.0	0.0	1.7	1.5	3.0	77.3	2.8	1.0	0.4	0.0	0.0	0.0	7.1	0.2	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Others	0.5	0.4	4.4	0.0	0.0	48.0	24.5	20.8	0.0	0.2	0.9	0.8	0.0	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
SUB TOTAL: FINGAL COUNTY	2.5	6.3	5.4	0.0	3.0	83.6	78.5	98.1	2.8	1.1	1.3	0.8	0.0	0.0	8.9	0.2	0.0	4.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Liffey Valley - Major Town Centre	1.8	0.0	0.3	0.0	1.2	0.0	0.0	0.0	0.1	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Tallaght - Major Town Centre	0.3	0.0	3.6	0.4	6.4	0.0	0.0	0.0	0.0	46.6	3.7	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	6.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Others	2.6	0.9	0.0	5.3	16.2	0.0	1.2	0.0	91.8	43.5	53.2	9.4	0.4	0.0	0.0	2.9	4.0	1.5	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.2	1.0	
SUB TOTAL: SOUTH DUBLIN COUNTY	4.6	0.9	3.9	5.7	23.8	0.0	1.2	0.0	91.9	90.2	57.0	9.4	0.8	0.0	0.0	2.9	4.0	1.5	1.5	6.3	0.0	0.0	0.0	0.0	0.0	0.0	5.2	1.0	
Dundrum - Major Town Centre	0.3	1.5	3.9	9.6	0.7	0.0	0.0	0.0	0.0	2.0	6.9	36.0	9.0	0.0	0.0	0.0	0.0	0.0	0.0	1.9	0.0	0.7	0.0	0.0	1.6	0.0	0.0		
Dun Laoghaire - Major Town Centre	0.0	0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.0	0.1	0.0	1.8	24.0	0.0	0.0	0.4	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Others	2.7	0.0	0.0	4.8	0.4	0.2	0.0	0.2	0.2	1.4	6.5	46.9	64.9	0.0	0.0	0.2	0.0	5.2	0.0	0.0	11.4	0.0	0.8	0.8	0.0	0.2	0.0		
SUB TOTAL: DLR COUNTY	3.1	1.5	3.9	15.4	1.1	0.2	0.0	0.2	0.2	3.5	13.3	84.7	97.9	0.0	0.0	0.6	0.0	5.2	0.2	0.0	13.3	0.0	1.5	0.8	0.0	1.8	0.0		
Navan - County Town Centre	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	46.6	40.6	16.7	1.4	1.2	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Others	0.0	0.8	0.0	0.0	0.0	1.8	0.0	0.0	0.2	0.0	0.5	0.6	0.0	44.3	42.3	51.3	0.2	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.2	0.0		
SUB TOTAL: MEATH COUNTY	0.1	0.8	0.0	0.0	0.0	1.8	0.0	0.0	0.2	0.3	0.5	0.6	0.0	90.9	82.9	68.0	1.6	1.2	0.6	0.0	0.0	0.1	0.0	0.0	0.0	0.2	0.0		
Naas/Newbridge/Kilcullen - County Town Centre	0.0	0.0	0.0	0.0	0.0	2.1	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.2	0.0	8.3	55.6	67.3	53.7	16.4	0.0	0.0	0.0	0.0	0.0	3.9	0.0		
Leixlip/Maynooth/Celbridge - Town and/or District Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.5	0.0	0.0	0.0	0.0	0.5	14.5	23.2	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Others	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.3	15.7	31.2	0.0	0.0	0.0	0.0	2.3	0.0	0.0	0.0		
SUB TOTAL: KILDARE COUNTY	0.0	0.0	0.0	0.0	0.0	2.1	0.0	0.0	0.9	0.8	0.0	0.0	0.0	0.2	0.5	22.9	86.1	84.4	84.9	16.4	0.0	0.0	0.0	2.3	0.0	3.9	0.0		
Bray - Major Town Centre	0.0	0.0	0.0	0.0	0.0	4.2	2.8	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	36.8	0.3	0.0	0.0	0.0	0.0	0.0		
Wicklow - County Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.5	0.3	0.0	0.0	0.0	0.0	0.3		
Others	0.0	0.0	0.0	0.6	0.0	0.6	3.4	0.0	0.0	0.0	0.0	0.0	0.2	1.8	1.7	0.0	0.2	0.0	0.0	64.0	39.6	98.2	0.0	0.0	0.0	0.1	0.0		
SUB TOTAL: WICKLOW COUNTY	0.0	0.0	0.0	0.6	0.0	4.8	6.2	0.0	0.0	0.0	0.0	0.0	0.7	1.8	1.7	0.0	0.2	0.0	0.0	64.0	85.9	98.8	0.0	0.0	0.0	0.1	0.0		
SUB TOTAL: GDA	99.7	100.0	99.1	96.5	99.7	98.6	98.3	99.7	100.0	99.3	99.1	99.2	99.4	92.9	94.7	98.7	99.6	99.5	93.7	96.2	99.3	98.9	1.6	11.0	1.9	6.4	13.8	1.9	
OUTSIDE GDA																													
All Centres / Stores	0.3	0.0	0.9	3.5	0.3	1.4	1.7	0.3	0.0	0.7	0.9	0.8	0.6	7.1	5.3	1.3	0.4	0.5	6.3	3.8	0.7	1.1	98.4	89.0	98.1	93.6	86.2	98.1	
SUB TOTAL OUTSIDE GDA	0.3	0.0	0.9	3.5	0.3	1.4	1.7	0.3	0.0	0.7	0.9	0.8	0.6	7.1	5.3	1.3	0.4	0.5	6.3	3.8	0.7	1.1	98.4	89.0	98.1	93.6	86.2	98.1	
TOTAL (FOR HOUSEHOLD SURVEY AREA)	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	

Notes:
Some of the market share percentages have been adjusted from those set out in Table 5, to reflect retail planning policy aims and aspirations for certain centres and Council areas.

TABLE 8 - CONVENIENCE GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES, 2016 (€ MILLION)

Centre	Consumer Demand: Where the Money Comes From (Zone, County and Region)																												SUB TOTAL GDA HINTERLAND	TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-28)	Estimated Inflow Expenditure ⁽¹⁾	Convenience Goods Turnover			
	Dublin													SUB TOTAL DUBLIN	Mid East									SUB TOTAL MID EAST	GDA Hinterland											
	Dublin City				Dublin Fingal				South Dublin			Dublin Dun Laoghaire-Rathdown			Meath			Kildare			Wicklow				Louth	Cavan and Monaghan	Longford and West Meath	Offaly and Laois						Carlow and Kilkenny	Wexford	
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13		Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	Zone 19	Zone 20	Zone 21	Zone 22		Zone 23	Zone 24	Zone 25	Zone 26						Zone 27	Zone 28	
A		B		C = A + B																																
WITHIN GDA																																				
Dublin City Centre - Metropolitan Centre	194.2	13.8	14.5	14.0	7.9	0.9	0.0	0.0	1.4	1.7	4.2	1.6	0.0	254.1	0.0	1.6	2.9	20.1	2.0	1.2	2.5	0.4	0.0	30.6	0.0	0.0	7.1	0.0	19.1	0.0	26.2	310.9	310.9	124.8	435.7	
Others	100.6	267.3	312.9	135.5	158.6	8.8	48.1	4.6	11.9	7.5	36.8	8.3	0.0	1101.0	0.0	0.6	1.1	3.2	3.3	4.3	2.6	0.0	0.0	15.2	0.2	28.5	0.0	1.6	16.1	0.0	46.4	1162.5	1162.5	0.0	1162.5	
SUB TOTAL: DUBLIN CITY COUNTY	294.8	281.1	327.4	149.5	166.5	9.7	48.1	4.6	13.3	9.2	41.0	9.9	0.0	1355.0	0.0	2.2	3.9	23.3	5.4	5.5	5.1	0.4	0.0	45.8	0.2	28.5	7.1	1.6	35.2	0.0	72.6	1473.4	1473.4	124.8	1598.2	
Swords - Major Town Centre	0.0	3.1	3.9	0.0	3.0	53.3	197.6	0.0	0.0	0.0	0.0	0.0	0.0	260.9	0.0	2.8	0.0	0.0	6.5	0.0	0.0	0.0	0.0	9.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	270.3	270.3	0.0	270.3	
Blanchardstown - Major Town Centre	6.6	15.4	0.0	0.0	3.9	2.3	11.6	238.1	9.8	2.7	0.6	0.0	0.0	291.1	0.0	23.6	0.2	0.0	0.0	0.0	0.3	0.0	0.0	24.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	315.3	315.3	0.0	315.3	
Others	1.5	1.2	16.6	0.0	0.0	75.1	94.9	64.1	0.0	0.5	1.3	2.2	0.0	257.4	0.0	3.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.2	0.0	0.0	0.0	0.2	0.0	0.0	0.2	260.8	260.8	0.0	260.8	
SUB TOTAL: FINGAL COUNTY	8.1	19.7	20.5	0.0	7.0	130.7	304.1	302.2	9.8	3.2	2.0	2.2	0.0	809.5	0.0	29.7	0.2	0.0	6.5	0.0	0.3	0.0	0.0	36.7	0.0	0.0	0.0	0.2	0.0	0.0	0.2	846.3	846.3	0.0	846.3	
Liffey Valley - Major Town Centre	5.8	0.0	1.2	0.0	2.8	0.0	0.0	0.0	0.5	0.3	0.1	0.0	0.0	10.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.7	10.7	0.0	10.7	
Tallaght - Major Town Centre	0.9	0.0	13.7	0.8	14.9	0.0	0.0	0.0	0.0	130.2	5.6	0.0	1.4	167.4	0.0	0.0	0.0	0.1	0.0	0.0	0.0	3.7	0.0	0.0	3.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	171.2	171.2	0.0	171.2
Others	8.5	2.7	0.0	10.5	37.5	0.0	4.6	0.0	316.5	121.6	80.8	25.7	1.3	609.9	0.0	0.0	2.7	12.0	2.4	1.2	0.0	0.0	0.0	18.3	0.0	0.0	0.0	0.0	21.6	4.3	25.9	654.1	654.1	0.0	654.1	
SUB TOTAL: SOUTH DUBLIN COUNTY	15.3	2.7	14.9	11.3	55.2	0.0	4.6	0.0	317.0	252.1	86.5	25.7	2.7	788.1	0.0	0.0	2.7	12.2	2.4	1.2	3.7	0.0	0.0	22.1	0.0	0.0	0.0	0.0	21.6	4.3	25.9	836.1	836.1	0.0	836.1	
Dundrum - Major Town Centre	1.0	4.6	14.8	19.3	1.7	0.0	0.0	0.0	0.0	5.5	10.4	98.8	30.5	186.6	0.0	0.0	0.0	0.0	0.0	0.0	5.2	0.0	0.0	5.2	2.4	0.0	0.0	6.5	0.0	0.0	8.8	200.6	200.6	0.0	200.6	
Dun Laoghaire - Major Town Centre	0.2	0.0	0.0	1.8	0.0	0.0	0.0	0.0	0.0	0.3	0.0	4.9	81.3	88.5	0.0	0.0	0.4	0.0	0.0	0.2	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	89.0	89.0	0.0	89.0	
Others	9.0	0.0	0.0	0.0	9.6	0.9	0.2	0.0	0.5	0.7	4.0	9.8	128.7	219.7	0.0	0.0	0.2	0.0	8.5	0.0	0.0	31.5	0.0	40.3	2.5	2.8	0.0	1.0	0.0	0.0	6.3	429.8	429.8	0.0	429.8	
SUB TOTAL: DLR COUNTY	10.2	4.6	14.8	30.7	2.5	0.2	0.0	0.5	0.7	9.9	20.3	232.4	331.5	658.3	0.0	0.0	0.6	0.0	8.5	0.2	0.0	36.8	0.0	46.0	4.9	2.8	0.0	7.4	0.0	0.0	15.1	719.5	719.5	0.0	719.5	
Navan - County Town Centre	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.0	0.0	1.4	29.5	135.0	15.7	4.4	1.9	0.5	0.0	0.0	0.0	186.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	188.3	188.3	0.0	188.3	
Others	0.0	2.4	0.0	0.0	0.0	2.7	0.0	0.0	0.7	0.0	0.7	1.7	0.0	8.4	28.0	140.6	48.2	0.5	0.0	0.0	0.0	0.0	0.1	217.4	0.0	0.0	0.0	0.9	0.0	0.0	0.9	226.7	226.7	0.0	226.7	
SUB TOTAL: MEATH COUNTY	0.4	2.4	0.0	0.0	0.0	2.7	0.0	0.0	0.7	0.9	0.7	1.7	0.0	9.8	57.5	275.6	63.9	4.9	1.9	0.5	0.0	0.1	404.3	0.0	0.0	0.0	0.9	0.0	0.0	0.9	415.0	415.0	0.0	415.0		
Naas/Newbridge/Kilcullen - County Town Centre	0.0	0.0	0.0	0.0	0.0	3.3	0.0	0.0	0.0	0.8	0.0	0.0	0.0	4.1	0.1	0.0	7.8	168.9	109.5	45.3	9.4	0.0	0.0	341.0	0.0	0.0	0.0	16.1	0.0	0.0	16.1	361.2	361.2	0.0	361.2	
Leixlip/Maynooth/Celbridge - Town and/or District Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.3	1.4	0.0	0.0	0.0	4.7	0.0	1.7	13.7	70.5	2.3	0.0	0.0	0.0	0.0	88.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	92.8	92.8	0.0	92.8	
Others	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.1	0.0	0.0	0.0	22.2	25.5	26.3	0.0	0.0	0.0	74.0	0.0	8.3	0.0	0.0	0.0	0.0	8.3	82.3	82.3	0.0	82.3	
SUB TOTAL: KILDARE COUNTY	0.0	0.0	0.0	0.0	0.0	3.3	0.0	0.0	3.3	2.2	0.0	0.1	0.0	8.8	0.1	1.7	21.5	261.5	137.3	71.6	9.4	0.0	0.0	503.1	0.0	8.3	0.0	16.1	0.0	0.0	24.4	536.3	536.3	0.0	536.3	
Bray - Major Town Centre	0.0	0.0	0.0	0.0	0.0	6.6	10.9	0.0	0.0	0.0	0.0	0.0	1.8	19.3	0.0	0.0	0.0	0.0	0.0	0.0	101.8	0.2	102.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	121.3	121.3	0.0	121.3		
Wicklow - County Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	26.3	0.3	26.6	0.0	0.0	0.0	0.0	0.0	1.4	1.4	27.9	27.9	0.0	27.9		
Others	0.0	0.0	0.0	1.2	0.0	0.9	13.2	0.0	0.0	0.0	0.0	0.0	0.5	15.9	1.1	5.7	0.0	0.6	0.0	0.0	36.8	109.5	85.5	239.2	0.0	0.0	0.0	0.4	0.0	2.4	2.7	257.9	257.9	0.0	257.9	
SUB TOTAL: WICKLOW COUNTY	0.0	0.0	0.0	1.2	0.0	7.5	24.1	0.0	0.0	0.0	0.0	2.3	35.2	1.1	5.7	0.0	0.6	0.0	0.0	36.8	237.6	86.0	367.8	0.0	0.0	0.0	0.4	0.0	3.7	4.1	407.1	407.1	0.0	407.1		
SUB TOTAL: GDA	328.7	310.5	377.6	192.7	231.2	154.1	380.9	307.3	344.8	277.5	150.5	272.1	336.5	3664.6	58.8	314.7	92.8	302.4	161.9	79.0	55.3	274.8	86.1	1425.8	5.1	39.5	7.1	26.6	56.8	8.0	143.1	5233.6	5233.6	124.8	5358.3	
OUTSIDE GDA																																				
All Centres / Stores	1.0	0.0	3.4	7.0	0.7	2.2	6.6	0.9	0.0	2.0	1.4	2.2	2.0	29.4	4.5	17.6	1.2	1.2	0.8	5.3	2.2	1.9	1.0	35.7	313.3	321.3	356.1	387.3	355.3	407.9	2141.3	2206.4				
SUB TOTAL OUTSIDE GDA	1.0	0.0	3.4	7.0	0.7	2.2	6.6	0.9	0.0	2.0	1.4	2.2	2.0	29.4	4.5	17.6	1.2	1.2	0.8	5.3	2.2	1.9	1.0	35.7	313.3	321.3	356.1	387.3	355.3	407.9	2141.3	2206.4				
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	329.7	310.4	381.2	199.6	231.8	156.4	387.4	308.1	344.8	279.5	151.8	274.4	338.6	3694.0	63.2	332.4	94.0	303.7	162.7	84.3	57.5	276.6	87.0	1461.6	318.4	360.8	363.2	413.9	412.0	416.0	2284.4	7440.0				

Notes:
 For each cell, the monetary figure is derived by multiplying the 2016 available convenience goods expenditure in the zone (exclu. SFT) (Table 4) by the adjusted convenience goods market share of the specified centre in that zone (Table 7).
 (1) Estimated by Colliers CRE (see Appendix 5c).

TABLE 9 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2016 (€ MILLION)

Centre	2007 Turnover	2016 Turnover Potential	Turnover Allocation for Existing Retailers 2007-2016	Residual Turnover Potential by 2016	Potential Headroom Expenditure by 2016
	A	B	C ⁽¹⁾	D = B - C	E = D - A
	(Table 6, C)	(Table 8, C)			
Dublin City Centre - Metropolitan Centre	336.0	435.7	18.8	416.9	80.9
Others	977.9	1,162.5	37.4	1,125.2	147.3
SUB TOTAL: DUBLIN CITY COUNTY	1,313.8	1,598.2	56.1	1,542.1	228.2
Swords - Major Town Centre	191.1	270.3	4.9	265.3	74.3
Blanchardstown - Major Town Centre	248.8	315.3	6.3	308.9	60.2
Others	192.3	260.8	8.3	252.5	60.2
SUB TOTAL: FINGAL COUNTY	632.2	846.3	19.5	826.8	194.6
Liffey Valley - Major Town Centre	8.7	10.7	0.6	10.1	1.4
Tallaght - Major Town Centre	145.5	171.2	6.4	164.8	19.3
Others	524.8	654.1	12.4	641.7	116.9
SUB TOTAL: SOUTH DUBLIN COUNTY	679.0	836.1	19.5	816.6	137.5
Dundrum - Major Town Centre	167.7	200.6	4.3	196.3	28.6
Dun Laoghaire - Major Town Centre	64.9	89.0	3.4	85.7	20.8
Others	351.3	429.8	13.5	416.3	65.0
SUB TOTAL: DLR COUNTY	583.9	719.5	21.2	698.3	114.4
Navan - County Town Centre	132.8	188.3	5.2	183.1	50.2
Others	164.5	226.7	6.4	220.3	55.9
SUB TOTAL: MEATH COUNTY	297.3	415.0	11.6	403.4	106.1
Naas/Newbridge/Kilcullen - County Town Centre	277.3	361.2	7.5	353.7	76.4
Leixlip/Maynooth/Celbridge - Town and/or District Centre	74.8	92.8	6.6	86.2	11.4
Others	57.0	82.3	5.5	76.8	19.8
SUB TOTAL: KILDARE COUNTY	409.2	536.3	19.5	516.8	107.6
Bray - Major Town Centre	85.4	121.3	4.0	117.2	31.9
Wicklow - County Town Centre	19.6	27.9	1.4	26.5	6.9
Others	186.7	257.9	6.9	250.9	64.2
SUB TOTAL: WICKLOW COUNTY	291.7	407.1	12.4	394.7	103.0
TOTAL: GDA	4,207.0	5,358.3	159.8	5,198.5	991.5

Notes:

(1) It is assumed that all existing convenience goods floorspace at the base year (2007) will achieve a real sales productivity gain of 0.5% per annum. This figure is based on in-depth research carried out by Experian in the UK (see Appendix 5), with an adjustment to reflect the retail economy of the GDA and the planning aspirations of the Councils. The sales productivity gains are applied to the estimated 2007 benchmark convenience goods turnovers of each centre as set out in Table 6 (Column G).

TABLE 10 - NEED FOR ADDITIONAL CONVENIENCE GOODS FLOORSPACE AT 2016

Centre	Potential Headroom Expenditure by 2016 (€m)	Adjustment for Over / Under Trading in Base Year (€m)	Adjusted Headroom Expenditure by 2016 (€m)	Assumed Sales Density in 2016 ⁽¹⁾ (€ per sq.m net)	Estimated Retail Floorspace Need in 2016 (sq.m net)	Estimated Retail Floorspace Need in 2016 (sq.m gross) ⁽²⁾
	A	B	C = A + B	D	E = C / D	F
	(Table 9, E)	(Table 6, H)				
Dublin City Centre - Metropolitan Centre	80.9	-72.6	8.3	12,551	662	1,003
Others	147.3	164.0	311.3	12,551	24,805	37,583
SUB TOTAL: DUBLIN CITY COUNTY	228.2	91.4	319.6		25,467	38,586
Swords - Major Town Centre	74.3	83.8	158.1	12,551	12,598	19,088
Blanchardstown - Major Town Centre	60.2	111.0	171.2	12,551	13,638	20,664
Others	60.2	11.7	71.9	12,551	5,727	8,677
SUB TOTAL: FINGAL COUNTY	194.6	206.6	401.2		31,963	48,429
Liffey Valley - Major Town Centre	1.4	-5.3	-4.0	12,551	-318	-481
Tallaght - Major Town Centre	19.3	5.3	24.6	12,551	1,956	2,964
Others	116.9	254.5	371.4	12,551	29,591	44,835
SUB TOTAL: SOUTH DUBLIN COUNTY	137.5	254.4	392.0		31,230	47,318
Dundrum - Major Town Centre	28.6	73.7	102.3	12,551	8,149	12,347
Dun Laoghaire - Major Town Centre	20.8	-8.9	11.9	12,551	950	1,439
Others	65.0	57.3	122.3	12,551	9,747	14,769
SUB TOTAL: DLR COUNTY	114.4	122.1	236.5		18,846	28,555
Navan - County Town Centre	50.2	19.6	69.8	12,551	5,562	8,428
Others	55.9	25.7	81.6	12,551	6,502	9,852
SUB TOTAL: MEATH COUNTY	106.1	45.3	151.4		12,065	18,280
Naas/Newbridge/Kilcullen - County Town Centre	76.4	114.9	191.3	12,551	15,243	23,096
Leixlip/Maynooth/Celbridge - Town and/or District Centre	11.4	-68.0	-56.6	12,551	-4,508	-6,830
Others	19.8	-63.2	-43.5	12,551	-3,462	-5,245
SUB TOTAL: KILDARE COUNTY	107.6	-16.3	91.3		7,273	11,020
Bray - Major Town Centre	31.9	-2.7	29.2	12,551	2,326	3,524
Wicklow - County Town Centre	6.9	-11.2	-4.3	12,551	-340	-514
Others	64.2	35.9	100.1	12,551	7,979	12,089
SUB TOTAL: WICKLOW COUNTY	103.0	22.1	125.1		9,965	15,099
TOTAL: GDA	991.5	725.6	1,717.1		136,809	207,286

Notes:

(1) The derivation of the 2016 assumed average density estimate is set out in Chapter 5 of the main report.

(2) The net floorspace figures in Column E are converted to gross floorspace estimates by applying the net to gross ratios set out in Appendix 1.