

# Retail and Commercial Leisure Capacity Study – Supplementary Report

**on behalf of Newry, Mourne and Down District Council**

April 2022



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Job reference no: 34465

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## 1.0 Introduction

### The 2020 Study

- 1.1 Nexus Planning ('Nexus') was commissioned by Newry, Mourne and Down District Council ('the Council' or 'NMDDC') in September 2019 to produce a Retail and Commercial Leisure Capacity Study for the District. The Study was completed in September 2020 and will inform preparation of the LDP. Its key outputs are to establish the capacity for retail and commercial leisure development through to the end of the Plan period, as well as to consider recommendations for future improvements relating to town centre boundaries, and any policy requirements to support the on-going vitality and viability of identified centres.
- 1.2 The Study primarily concerned itself with the eight town centres (as defined within the Council's Preferred Options Paper) within the Council's administrative boundary (namely: Newry City, Downpatrick, Warrenpoint, Newcastle, Kilkeel, Ballynahinch, Newtownhamilton and Crossmaglen), as well as four proposed town centres (namely: Saintfield, Killyleagh, Castlewellan and Bessbrook).
- 1.3 The Study was underpinned by empirical evidence in the form of a 900 sample household telephone survey. This extensive survey considered the retail and leisure habits of residents both inside (600 samples) and outside (300 samples) the District. It built an accurate picture of the extent to which the District retains the spending power of its own residents, as well as the extent to which it 'leaks' resident's spending beyond its boundaries, and the extent to which it attracts 'inflows' of spend from elsewhere, including the Republic. The Study was also informed by the qualitative views of a number of stakeholders and members of the public, in the form of workshops undertaken with the Council across the District, and we supplemented those with our own observations from a series of town centre health-checks. The combination of these quantitative and qualitative factors, together with our own assessment, helped shape our recommendations to the Council.

### The 2022 Update Study

- 1.4 The Council has now commissioned Nexus to prepare an update to that Study. The update does not replicate the 2020 Study, and so should be read alongside that Study. The update focuses on four specific tasks, as follows:
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1. A consideration of the impact of Covid-19 on the high street and traditional patterns of retail spend, as well as the impact of Brexit and implications for retail and commercial leisure sectors. How can the Council through the LDP support the high street in light of the changing retail environment?
2. Updates to forecasting in the previous Study to take account of changes over the intervening period, as well as extending that forecasting to 2035. Updates to be made to:
  - Base population forecasts (Experian base data, updated using NISRA forecasts);
  - Base expenditure forecasts (using the latest Experian Retail Planner Briefing Note); and
  - Review the need for additional convenience and comparison floorspace taking account of already committed development.
3. Updated health-checks for each of the eight town centres (Newry City, Downpatrick, Warrenpoint, Newcastle, Kilkeel, Ballynahinch, Newtownhamilton and Crossmaglen), as well as four proposed town centres (namely: Saintfield, Killyleagh, Castlewellan and Bessbrook). This will follow the format of the health-check assessments contained in Section 4 of the 2020 Study and will compare and contrast changes to a) the composition of each centre, and b) the physical structure and environmental quality of each centre.
4. Review and revise the NMDDC Retail Hierarchy taking account of work undertaken by the Plan team for village centres.

## Structure of the Study

1.5 In light of the requirements of the Brief, we have structured our Study as follows:

- **Section 2** summarises key current and future retail and leisure trends, with special attention paid to the impacts of Covid and Brexit.
  - **Section 3** details our updated assessment of the current and future population and expenditure levels within the Study Area and provides our analysis in respect to the quantitative need for further convenience and comparison floorspace over the assessment period (to 2035).
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- **Section 4** contrasts the key findings of our 2019/2020 health-checks with update assessments carried out in 2022.
- **Section 5** examines the Council's Retail Hierarchy and how work carried out on village centres might be reflected in that hierarchy, as well as making broader recommendations on policy themes for the emerging LDP.

## 2.0 Current Retail and Leisure Trends

### Introduction

- 2.1 In order to provide a context for this Supplementary Study, we provide an overview of how retail and leisure trends have evolved over the past few years below. It should be noted that the retail and leisure sectors are dynamic and that new retail and leisure formats continue to evolve to meet our everyday needs. The below commentary should therefore be taken as a 'snapshot'. This is particularly the case given the current commercial circumstances arising from the Covid-19 pandemic and Brexit. We conclude by examining how these trends might impact on the policies brought forward through the Local Development Plan.

### The Current State of the UK Economy

- 2.2 The UK economy has experienced a significant shock as a result of the Covid-19 pandemic (which started in early 2020), as well as subsequent restrictions on movement and behaviour which have sought to mitigate its impact. This uncertain background has caused business investment and expenditure to decline. Due to Covid-19, in 2020, GDP declined by 9.9%, which is more than twice the fall in 2009<sup>1</sup>. However, at the time of writing, there is an indication that the UK economy is starting to recover with the GDP in Q3 2021 reaching broadly similar levels to that of Q1 2020<sup>2</sup>. UK GDP in Q2 2021 is estimated to be 8.4% higher than its pre-economic downturn peak of Q1 2008.
- 2.3 Looking at Northern Ireland, NISRA reports<sup>3</sup> that the NI Composite Economic Index (NICEI) has recovered from its respective series lows in Q2 2020 and has increased to levels of output last seen at the end of 2019; Northern Ireland performed better than any other region in the UK<sup>4</sup>. However, the NICEI is currently 4.9% below the maximum value recorded in Q2 2007. The economists at EY have estimated that the recovery of the Northern Ireland's economy will continue in 2022 with estimated growth of 4%. However, it could be 2024 before all the jobs lost during the crisis are replaced<sup>5</sup>.

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<sup>1</sup> [ONS, Coronavirus and the impact on output in the UK economy: December 2020, 12 February 2021](#)

<sup>2</sup> [ONS, Gross Domestic Product: chained volume measures: Seasonally adjusted £m, 11 November 2021](#)

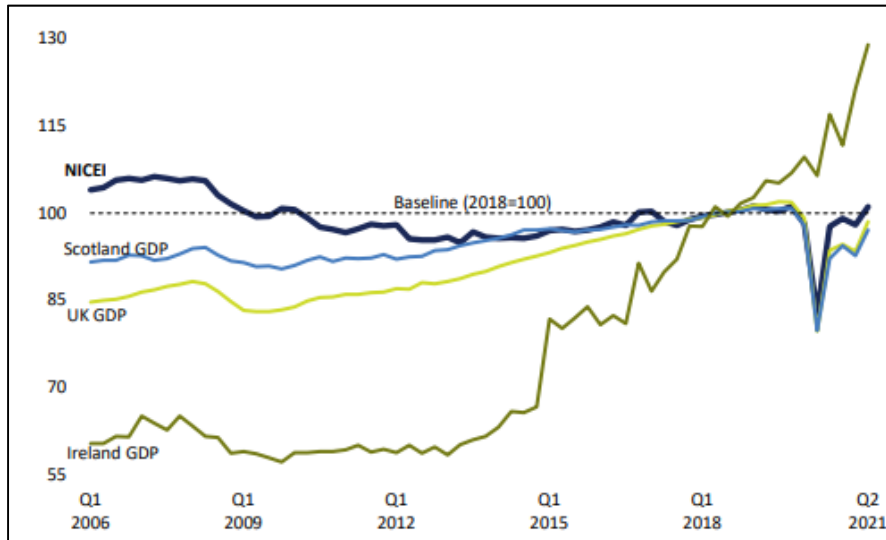
<sup>3</sup> [NISRA, Economic Activity in Northern Ireland by quarterly NI Composite Economic Index \(NICEI\) Experimental statistics Quarter 2 \(April – June\) 2021](#)

<sup>4</sup> [Belfast Telegraph, 1 December 2021](#)

<sup>5</sup> [BBC News, 27 April 2021](#)

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**Figure 2.1 - NICEI, comparison with selected GDP measures Q1 2006 – Q2 2021**



## The Retail and Leisure Economy

- 2.4 The retail sector has endured a particularly difficult pandemic, with multiple lockdowns and online competition leading to the permanent closure of many shops and businesses. UK high streets have already been in continuous decline since the 2007 recession<sup>6</sup>, with consumer habits moving away from the traditional high street experience<sup>7</sup>. The pandemic, however, accelerated these pre-existing challenges, including creating an unprecedented rise in online shopping. To address the growing concerns, in August 2020, the High Street Task Force for Northern Ireland was created by the Government; and in October 2021, Ministers launched an associated call for evidence<sup>8</sup>.
- 2.5 Indeed, high streets across the UK have suffered big financial losses. Net absorption of retail space has turned sharply negative (resulting in higher vacancies), with less affluent towns and shopping centres most severely impacted<sup>9</sup>. UK retail investment has slowed sharply since the coronavirus crisis began. Investor sentiment towards the retail sector, which was already weak prior to the pandemic, has worsened considerably. The pandemic has caused the delay, cancellation or amendment of many retail projects across the UK. The 7.6 million square foot of retail space currently under construction,

<sup>6</sup> In 2011, the Portas Review summarised the challenges for high street retailers as follows: "The phenomenal growth of online retailing, the rise of mobile retailing, the speed and sophistication of the major national and international retailers, the epic and immersive experiences offered by today's new breed of shopping mall, combined with a crippling recession, have all conspired to change today's retail landscape".

<sup>7</sup> [Northern Ireland Executive, High Street Task Force, Call for Evidence 2021](#)

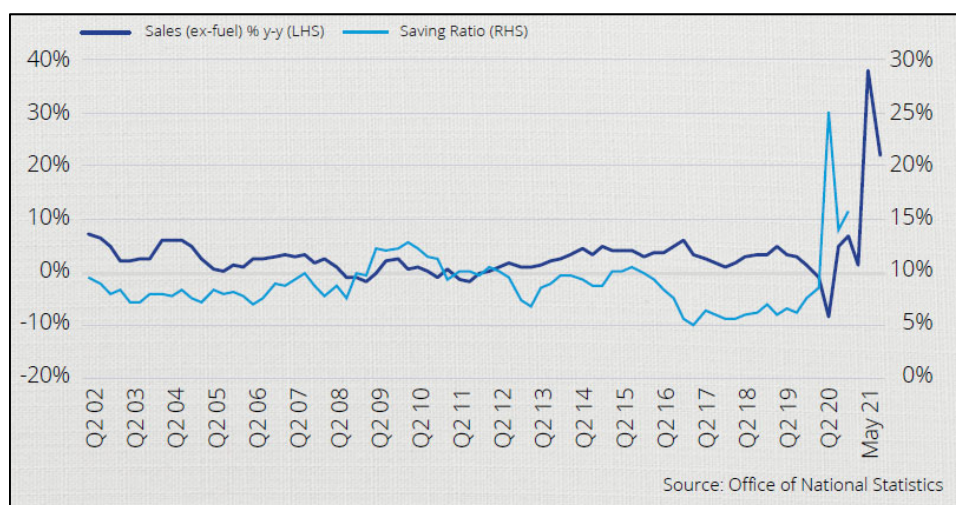
<sup>8</sup> [Northern Ireland Executive](#)

<sup>9</sup> CoStar's Retail National Report for the UK 2021

represents the lowest figure in more than a decade and is less than half the amount that was underway at the height of the financial crisis in early 2009<sup>10</sup>. Overall, the UK has an overprovision of retail floorspace<sup>11</sup>, which is likely to result in high streets condensing and little new retail space being built in the next few years; and the trend of converting retail space to other uses to accelerate<sup>12</sup>.

- 2.6 However, signs of recovery have emerged in recent months as a result of the successful vaccination programme and lifting of all pandemic restrictions. In the UK, retail take-up reached a two-year high in Q3 2021, which was notable for a revival in leasing activity by fashion and food and beverage retailers- retail availability rate has come down as a result, although it remains elevated compared to historic norms<sup>13</sup>. In Northern Ireland, mobility / activity in retail & recreation has gradually been increasing: in August 2021, people movements within Retail & Recreation were only 3% below normal levels. The footfall experienced in towns and cities has recovered well also, but is still below pre-March 2020 levels<sup>14</sup>.

**Figure 2.2 - UK Retail sales volume and household savings**



- 2.7 The hospitality sector was one of the earliest and hardest hit and is expected to be one of last to fully recover, as most businesses were not able to reopen until social distancing measures were lifted.

<sup>10</sup> CoStar's Retail National Report for the UK 2021

<sup>11</sup> Experian, Retail Planner Briefing Note 18, October 2020

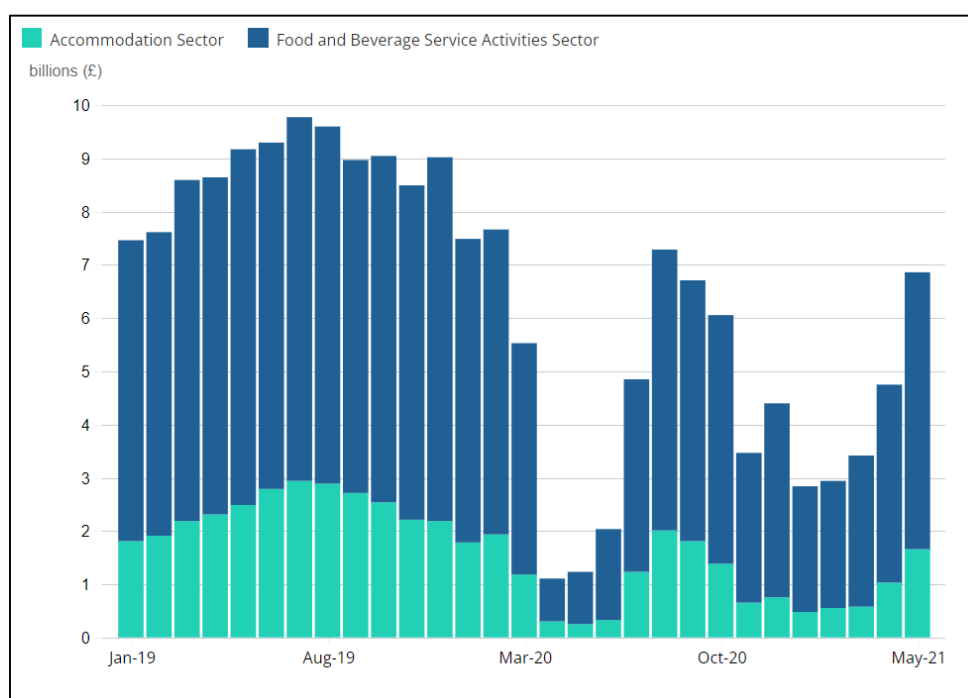
<sup>12</sup> CoStar's Retail National Report for the UK 2021

<sup>13</sup> CoStar's Retail National Report for the UK 2021

<sup>14</sup> [Department for the Economy, Economic Recovery from Covid-19 and Restrictions, August 2021](#)

Hotels and restaurants had some of the highest furlough take-up rates under HMRC's Job Retention Scheme.

**Figure 3.3 - ONS Monthly business turnover for accommodation and food and beverage serving activities sub-sectors, UK, January 2019 to May 2021 <sup>15</sup>**



- 2.8 In September 2021, retail and hospitality in Northern Ireland was almost back to pre-pandemic levels of business, but some parts of the services sector, including theatres and cinemas, are still hurting badly, according to the latest official figures. Overall the retail and hospitality sector has seen a 29% boost over 2021, but output here remains 1.2% below the last quarter of 2019. But while retail and hospitality have recovered, footfall and revenue in other services, including theatres and cinemas, is still 20% below pre-pandemic levels<sup>16</sup>.

## Consumer Spending

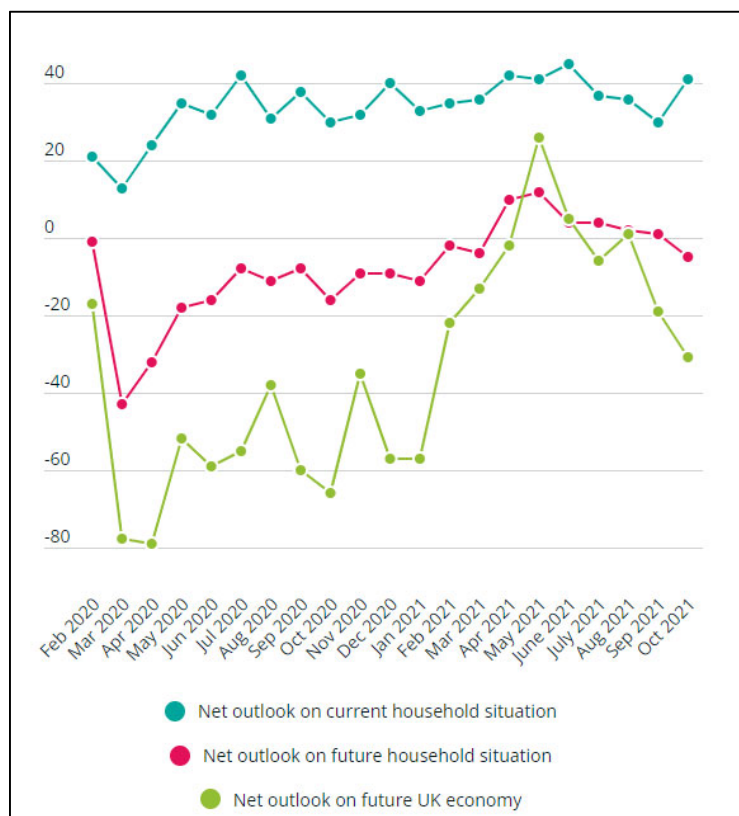
- 2.9 There is now also growing evidence that consumers are beginning to spend the savings made during the lockdown: in Northern Ireland 36% of people reported to *Which?* that their household had been

<sup>15</sup> [ONS, Coronavirus and its impact on UK hospitality: January 2020 to June 2021, July 2021](#)

<sup>16</sup> [Belfast Telegraph, 17 September 2021](#)

able to save more money over the course of the pandemic<sup>17</sup>. Also, UK savings ratio reached an all-time high of over 25% in Q2 2020, indicating a potential 'pent-up consumer demand'<sup>18</sup>. Inevitably though, the pandemic has shaken consumer confidence - Northern Irish consumers are particularly pessimistic about how well the economy will perform in the coming year<sup>19</sup>, which may affect spending patterns going forward.

**Figure 2.4 - Consumer Confidence**



2.10 Experian's yearly forecasts from January 2022 predict, per capita, retail expenditure growth across the UK – this is shown in Figure 2.5 below<sup>20</sup>. Over the medium term, retail sales volumes are expected to return to a stronger footing with the removal of Brexit and Covid-19 related uncertainty and a strengthening economic backdrop. However, the weakened financial positions of households, businesses and government will be a constraint and spending volumes will remain, on average, below levels expected before the crisis. In the long term, the Covid-19 crisis is unlikely to impact on the economy's growth potential. Increasing inflation will also be an important factor. Hence, the longer-

<sup>17</sup> Which?, Consumers in Northern Ireland 2021. March 2021

<sup>18</sup> Colliers, Midsummer Retail Report, 2021

<sup>19</sup> Which?, Consumers in Northern Ireland 2021. March 2021

<sup>20</sup> Experian, Retail Planner Briefing Note 19, January 2022

term outlook for retail sales growth remains unchanged from the prediction made by Experian before the pandemic.

- 2.11 There was a significant boost to convenience goods spending (+8.7%) as a result of social distancing measures and working from home in 2020. However, the sector is now shown to be levelling back out over the medium/longer-term.
- 2.12 Comparison goods should benefit as an improvement in confidence and incomes help stimulate discretionary spending. Volumes are projected to reach pre Covid-19 levels in 2023 onwards. The medium/longer-term growth outlook remains similar to that before the pandemic, but spending levels will be lower than before the crisis.
- 2.13 Leisure spending reduced significantly in 2020 (-37.2%), but has risen again in 2021 (+21.9%) and is expected to increase further in 2022 (+24.1%) as confidence grows amongst the consumers to visit public places and to “make up for lost time” during the lockdown period. Over the medium term, the spend per head will continue to increase, albeit with the spend per head being marginally lower compared to the pre-pandemic levels.

**Figure 2.5 - Experian's Identified and Forecast growth in Retail Spend Per Head (%)**

Volume Growth Per Head (%)	2017	2018	2019	2020	2021	2022	2023	2024 -28	2029 -40
<b>Retail Spend</b>	2.5	0.6	0.9	4.2	-0.2	0.7	1.8	1.9	2.1
<b>Convenience goods</b>	0.2	0.0	-1.2	8.7	-3.7	-2.0	0.1	0.1	0.1
<b>Comparison goods</b>	3.9	1.0	2.2	1.6	1.9	2.1	2.8	2.8	2.9
<b>Leisure</b>	1.3	-1.8	1.1	-37.2	21.9	24.1	1.0	1.1	0.9

Source: Figure 1a and Figure 1b of Experian Retail Planner Briefing Note 19 (January 2022)

## Online Shopping

- 2.14 The rise in internet retailing has been at the forefront of retail evolution for a number of years. Covid-19 has accelerated this trend. In the context of the pandemic, Experian projects that the market share of non-store retail sales for all goods grew to account for 28.1% of the market in 2020, and 30.2% of

the market in 2021<sup>21</sup>. To show how this has accelerated the forecast, in 2017 Experian projected that this level of market share was not to be reached until at least 2025<sup>22</sup>.

**Figure 3.6 - Experian's Identified and Forecast Market Share of Non-Retail Sales (%)**

Volume Growth Per Head (%)	2019	2020	2021	2022	2030	2035
<b>Total</b>	20.5	28.1	30.2	27.4	33.5	35.3
<b>Convenience goods</b>	13.7	18.0	20.9	19.1	23.6	24.7
<b>Comparison goods</b>	24.3	34.1	35.5	31.9	37.8	39.3

Source: Figure 5 of Experian Retail Planner Briefing Note 19 (January 2022)

- 2.15 According to the YouGov consumer survey undertaken by Scurri<sup>23</sup>, residents of Northern Ireland made the most online purchases in the UK during the 2020 lockdown: 88% of Northern Irish shoppers had 1-3 online orders delivered to their homes per week during lockdown, as opposed to 69% of English, 74% of Scottish and 79% of Welsh shoppers. Post lockdown, 62% still have 1-3 deliveries made to their homes each week. This is in line with the sustained growth in online sales seen across the ecommerce sector worldwide. The most purchased items across Northern Ireland during lockdown included clothing and footwear (27%), alcohol (17%), DIY equipment (8%), health and beauty products and fragrances (7%) home and garden items (7%), accessories (4%) as well as electrical equipment (2%)<sup>24</sup>.
- 2.16 Generally, Experian shows that growth in non-store retail is expected to be maintained, particularly through the wider adoption of, now commonplace, technology such as mobile phones and tablets, combined with 5G and fibre networks, faster delivery times and easier returns processes to make internet shopping even more convenient.

## Omni-Channel Retail

- 2.17 The ongoing popularity of internet shopping continues to have clear implications in respect of the viability of some 'bricks and mortar' retailers. However, this does not mean that physical retail is to become obsolete.

<sup>21</sup> Experian, Retail Planner Briefing Note 19, January 2022

<sup>22</sup> Experian, Retail Planner Briefing Note 17, February 2020

<sup>23</sup> A software provider that connects and optimises the eCommerce ordering, shipping, and delivery process

<sup>24</sup> [Newry News, 3 September 2020](#)

- 2.18 Omni-channel retail (or omnichannel commerce) is increasingly becoming the norm across the industry. This is a multichannel approach to sales that focuses on providing a seamless customer experience whether the client is shopping online or in a brick-and-mortar store. For example, many stores sell online but fulfil orders from regular stores rather than warehouses<sup>25</sup>. Such purchases, therefore, help to sustain tangible retail floorspace.
- 2.19 The acceleration in consumer behaviour change since 2020 has made an omnichannel strategy more important than ever. In research conducted by BigCommerce and Retail Dive in 2020, 46% of retail executives said they planned to increase their investment in omnichannel retailing moving forward, a move away from their plans prior to COVID-19<sup>26</sup>.
- 2.20 When it comes to shopping in physical stores, 2021 research by Klarna<sup>27</sup> (an online shopping platform) highlights that physical retail is still an important channel even for digital-savvy shoppers. More than half of Klarna users who shopped at retailers' physical stores valued seeing and feeling items they are buying in real life, before then paying for those goods online.

## Summary

- 2.21 The retail market has experienced significant changes in recent years and the prevailing retail environment continues to be somewhat unstable. In response to this unpredictability, those operating in the market are forced to adapt quickly or otherwise face falling profits.
- 2.22 In a market disrupted by continued changes in consumer behaviour, investing in the consumer experience is anticipated to be the key to success in securing resiliency in retail stores moving forward.

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<sup>25</sup> This is particularly the case with food shopping and speciality comparison goods purchases, where retailers often try to tap into a wider market through an online presence

<sup>26</sup> [bigcommerce.co.uk](https://bigcommerce.co.uk)

<sup>27</sup> [Internet Retailing, 13 October 2021](#)

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## 3.0 Market Share and Quantitative Capacity

### Introduction

- 3.1 Our 2020 Study assessed the population and available convenience and comparison retail expenditure within the Study Area, as well as the methodology for forecasting the available expenditure across the plan period. This data informed our quantitative model of available retail and leisure capacity in the Study Area, along with the NEMS Market Research household telephone surveys.
- 3.2 This Supplementary Report does not repeat the same methodological explanation of the steps taken in our 2020 Study. The same methodology is re-employed here and includes utilising the household telephone survey of 900 households prepared by NEMS Market Research in 2019. Please refer to Figures 3.1 and 3.2 of the original Study for details of the Survey Area Zones. We also do not repeat the findings of our market share assessment, as those findings are also common with the original Study.
- 3.3 In this Supplementary Report, we focus on updating the underpinning population and expenditure data for the area, based on the latest estimates for the Council area provided by Experian (base population and expenditure data) and by NISRA (population forecast data). Having updated those datasets, we set out the resultant revised capacities for convenience and comparison goods below.
- 3.4 Importantly, the latest Experian Retail Planner Briefing Note 19 (January 2022) is reflective of the latest economic forecasting in the wake of both Brexit and the Covid-19 pandemic.
- 3.5 In light of the revised LDP timeframes, we have also extended the timeframe for capacity assessment from 2030 to 2035.
- 3.6 Our updated statistical assessment is contained at **Appendix A** to this report.

### Core Study Area Population

- 3.7 We have extrapolated the latest population data for each zone using Experian census software (Micromarketer G3, 2022 reports). This data is based on the latest mid-year estimates for the postcode sector geography of the Study Area (2020 data).
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## Population Projections

- 3.8 Applied to the Experian base data figures for 2020, we present our population projections on a Zone-by-Zone basis in Figure 3.1 below. As recommended by the Council, we have projected forwards to 2030 using the latest NISRA forecast data for the District (2018-based). It is important to note that the population of the 'Core Study Area' does not equate to the population of the District, as the Core Study Area is a wider geography which includes some peripheral postcodes outside the District (as discussed in our original Study).

**Figure 3.1 | Population Projections across the Core Study Area**

Zones	2022	2025	2030	2035
<b>Zone 1</b>   Crossmaglen/Newtownhamilton area	24,160	24,507	24,962	25,318
<b>Zone 2</b>   Newry/Bessbrook area	55,567	56,365	57,413	58,231
<b>Zone 3</b>   Warrenpoint/Kilkeel area	42,197	42,803	43,599	44,221
<b>Zone 4</b>   Newcastle/Castlewellan area	21,374	21,681	22,084	22,398
<b>Zone 5</b>   Downpatrick/Killyleagh area	36,627	37,153	37,844	38,383
<b>Zone 6</b>   Ballynahinch/Saintfield area	19,378	19,656	20,021	20,307
<b>Total</b>	<b>199,301</b>	<b>202,165</b>	<b>205,923</b>	<b>208,859</b>

Appendix A, Table 1

## Retail Expenditure Forecasts

- 3.9 Retail expenditure data has been sourced from our in-house Experian MicroMarketer G3 system. We obtain separate data for convenience and comparison goods, which in turn are broken down into multiple goods categories, as set out in our full statistical assessment at **Appendix A**.
- 3.10 The data takes account of the socio-economic characteristics of the local population to provide local consumer expenditure calculations. Experian is a robust source of population and expenditure data that is widely used for calculating retail capacity across the industry. Expenditure data from Experian is provided in 2020 prices (as is every subsequent monetary value) and has been projected forward using per capita growth forecasts derived from the latest Experian Planner Briefing Note 19 (January 2022).
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**Figure 3.2 | Experian Retail Expenditure Forecasts**

Year	Convenience growth rates	Comparison growth rates
2020	8.7	1.6
2021	-3.7	1.9
2022	-2.0	2.1
2023	0.1	2.8
2024	0.1	2.8
2025	0.1	2.8
2026	0.1	2.8
2027	0.1	2.8
2028	0.1	2.8
2029	0.1	2.9
2030	0.1	2.9
2031	0.1	2.9
2032	0.1	2.9
2033	0.1	2.9
2034	0.1	2.9
2035	0.1	2.9

Table 1a, Experian Retail Planner Briefing Note 19, January 2022

- 3.11 As identified in Figure 3.2, Experian forecasts suggest that convenience goods expenditure will fall by 2.0% in 2022, before levelling off to a conservative average of 0.1% growth per annum over the period 2023-2035. The decline in spending in 2022 (and 2021) is largely as a result of the 'return to normal' following the pandemic which saw convenience goods spending increase by 8.7% in 2020 as a result of increased spending at home in substitution for spend on leisure activities (e.g. café and restaurant spending), and spending linked to the workplace (e.g. lunchtime spending). These trends are discussed previously in Section 2.
- 3.12 Comparison expenditure is forecast to recover to 2.1% in 2022, before increasing again and levelling off at 2.8-2.9% from 2023 and for the remainder of the Plan period. Experian forecast steady growth over the period 2023-2035 as comparison retailers incorporate newer technologies, innovations and formats (including 'click and collect') in order to respond to the increasing competition from internet shopping.
- 3.13 Experian note that long-term forecasts should be treated with caution, and that they should be subject to regular reviews given the wide range of factors that can influence the broader national economy. Experian produce annual updates to reflect this, and as we go on to discuss in our recommendations later in the report, we would advise that this report be re-visited in another 18-24 months in recognition
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of the exceptionally turbulent economic times surrounding COVID-19, Brexit and other global factors which have created turbulence in the supply chain.

### Non-Store Retailing or Special Forms of Trading

- 3.14 Special forms of trading (SFT) are defined by Experian as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies and are discussed in detail under “Special Forms of Trading (SFT) and Internet Shopping” in Section 2.
- 3.15 Experian Retail Planner Briefing Note 19 (January 2022) provides estimated year-on-year forecasts of internet and other SFT, which allows for us to ‘strip out’ any expenditure that is, either now or in the future, diverted to SFT. In line with the trends outlined in Section 2, this ensures that the generally increasing proportion of SFT accounted for in our modelling increases year-on-year in line with Experian forecasts. These increasing deductions for SFT have the effect of off-setting some of the growth in expenditure in the Study Area derived from population increases.

**Figure 3.3 | ‘Adjusted’ Special Forms of Trading Market Share Forecasts**

Year	Adjusted Convenience SFT	Adjusted Comparison SFT
2022	5.7%	23.9%
2025	6.5%	26.1%
2030	7.1%	28.3%
2035	7.4%	29.5%

Experian Retail Planner Briefing Note 19, January 2022, Appendix 3

- 3.16 Many stores offer online sales, but source goods from regular stores’ stock, as is often the case for foodstores where employees will pick online orders from stores’ shelves before, during or after opening hours. These orders are then delivered by dedicated vans at each store and as such, the online expenditure is attributed to tangible stores. Experian provides ‘adjusted’ Figures, cited above at Figure 3.3, which make an allowance for these online sales derived from individual stores to ensure that this expenditure is counted as ‘available’ spend within the Study Area.
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## Convenience Goods Expenditure

- 3.17 We then project forward available expenditure per capita and population growth for each survey Zone in 2022, 2025, 2030 and 2035 in order to estimate the total available convenience goods expenditure under each growth scenario.
- 3.18 In Figure 3.4 we consider the convenience goods expenditure generated by residents of Newry, Mourne and Down (assumed to broadly align with the Core Study Area). This is shown to increase by £21.8m over the period 2022-2035.

**Figure 3.4 | Total Available Convenience Goods Expenditure (£m)**

Zone	2022	2025	2030	2035	Growth 2022- 2035
<b>Zone 1</b>   Crossmaglen/Newtownhamilton area	56.0	56.5	57.5	58.6	2.6
<b>Zone 2</b>   Newry/Bessbrook area	128.3	129.5	131.6	134.2	5.9
<b>Zone 3</b>   Warrenpoint/Kilkeel area	99.5	100.4	102.1	104.1	4.6
<b>Zone 4</b>   Newcastle/Castlewellan area	52.2	52.7	53.6	54.6	2.4
<b>Zone 5</b>   Downpatrick/Killyleagh area	90.6	91.5	93.0	94.8	4.2
<b>Zone 6</b>   Ballynahinch/Saintfield area	48.7	49.1	49.9	50.9	2.2
<b>Total</b>	<b>475.3</b>	<b>479.7</b>	<b>487.7</b>	<b>497.1</b>	<b>21.8</b>

Appendix A, Table 2a

- 3.19 For the purpose of the Study this total available convenience expenditure is split across two sub-categories, with 75% of spending attributed to main food shopping trips and 25% attributed to 'top-up' shopping trips.

## Comparison Goods Expenditure

- 3.20 Experian provides comparison goods expenditure divided into eight sub-categories to allow for more detailed investigations of available expenditure. Bulky goods categories include 'DIY', 'Electrical' and 'Furniture', while non-bulky goods are made up of 'Books, CDs and DVDs', 'Chemist Goods', 'Clothing & Footwear', 'Small Household Goods' and 'Toys and Recreational Goods'.

**Figure 3.5 | Total Available Comparison Goods Expenditure (£m)**

Zone	2022	2025	2030	2035	Growth 2022- 2035
<b>Zone 1</b>   Crossmaglen/Newtownhamilton area	50.9	56.7	64.2	73.8	22.9
<b>Zone 2</b>   Newry/Bessbrook area	112.1	124.8	141.3	162.5	50.4
<b>Zone 3</b>   Warrenpoint/Kilkeel area	85.2	94.8	107.4	123.5	38.3
<b>Zone 4</b>   Newcastle/Castlewellan area	43.8	48.7	55.2	63.4	19.7
<b>Zone 5</b>   Downpatrick/Killyleagh area	78.6	87.4	99.0	113.8	35.3
<b>Zone 6</b>   Ballynahinch/Saintfield area	43.5	48.5	54.9	63.1	19.6
<b>Total</b>	414.0	460.9	521.9	600.1	186.1

Appendix A, Table 8

- 3.21 Applying the increases in population and comparison goods expenditure per capita, Figure 3.5 estimates that Newry, Mourne and Down will experience increases in spend of £186.1m over the period 2022-2035.

## Convenience Goods Capacity

- 3.22 One of the key aims of this Study is to provide recommendations on the capacity for new retail floorspace over the extended plan period to 2035. The use of long-term projections should be treated with caution and reviewed regularly in order to test the accuracy of the forecasts against emerging datasets. External national and international factors can influence the wider performance of the economy, which can have trickle down effects on local shopping patterns. One such national example has been the trend toward convenience discounters (such as Lidl) in response to the period of economic downturn between 2008 and 2013, whilst international factors include Brexit and COVID-19, which have had obvious impacts on economic forecasting
- 3.23 Importantly, we also note that any quantitative retail capacity that we may identify across the Study Area does not necessarily equate to justification for new retail floorspace in itself (especially in out-of-centre locations). Any such development would be required to be assessed in line with SPPS policy in terms of impacts on the vitality and viability of town centres, the potential to prejudice emerging town centre developments, and the 'town centre first' sequential approach to site selection. Equally, the converse also applies and a lack of identified capacity should not specifically rule out retail developments, where other material factors support such development.
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3.24 Detailed quantitative retail capacity tables are enclosed at **Appendix A**.

3.25 Retail capacity modelling follows a consistent, robust methodology, which incorporates a number of datasets and informed assumptions, which we describe further below. However, broadly speaking:

$$\text{Available Expenditure (£m)} - \text{Turnover of existing \& proposed retailing (£m)} = \text{Surplus or Deficit (£m)}$$

3.26 Experian MMG3 census software is used to provide localised expenditure per capita per annum for various forms of retail spending. These figures are then projected forwards based on population growth, changes in expenditure over time, and Special Forms of Trading (SFT) such as internet shopping.

3.27 The turnover of existing retailers across the Study Area is calculated based on average sales densities (turnover per square metre). Various retail planning sources provide average (or benchmark) sales densities for all national multiple retailers.

3.28 The surplus or deficit equates to the difference between the available retail expenditure across the Study Area and the turnover of existing facilities within the Study Area. If the total turnover is greater than the available expenditure, then the model would identify an oversupply of existing retail floorspace, whilst a surplus of expenditure would suggest capacity for additional retail floorspace.

3.29 Once the surplus or deficit of expenditure is calculated, it is then presented in floorspace figures (using average sales density assumptions) in order to demonstrate the findings within a 'real world' context. Often surplus figures are presented under a number of different scenarios representing various retailers. For example, discount retailers (such as Lidl amongst others) continue to operate at a lower sales density than the 'big 4' (Sainsbury's, Tesco, Asda, and Morrisons in England). Given the same available 'pot of expenditure', a higher sales density would result in a lower floorspace capacity than a lower sales density, which would result in a higher floorspace capacity.

3.30 Turning now to our detailed findings for Newry, Mourne and Down, as detailed in Figure 3.4 above, the Household Survey results show that the District has an 85.0% convenience goods market share of all spending carried out by residents of the Study Area.

3.31 In keeping with standard retail study methodology, when assessing the capacity for new convenience retail floorspace we adopt a constant market share in line with findings of the latest Household Survey (i.e. that stores across the authority area will continue to draw 85.0% of all convenience goods spending

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from the Study Area). We consider maintaining a constant market share a sensible basis for analysis because whilst there is planned population growth and committed developments inside Newry, Mourne and Down, we would expect a range of competing centres such as Armagh, Belfast, Dundalk and Newtownards (amongst others), to continue to exert a pull on residents of the hinterlands surrounding Newry, Mourne and Down. We expect the two factors to broadly even each other out.

3.32 In coming to this view, we have requested details of the range of pipeline developments in the surrounding authority areas of Armagh, Banbridge and Craigavon, Lisburn and Castlereagh and Ards and North Down, and reviewed the scale of the proposals coming forward in order to understand the potential for variations to established inflows and outflows of trade between the different areas. We are therefore confident that the evidence base passes the test of Soundness in this respect.

3.33 Based on a constant market share, we then allow for growth in retail expenditure over the period to 2035, as well as utilising data provided within the latest Experian Retail Planner Briefing Note 19, in order to take account of forecast growth in retail efficiencies (for example, through the adoption of new technologies and more efficient use of available floorspace). Floorspace efficiencies are estimated to have a greater impact on comparison retailers than convenience retailers over the plan period as the rise of food discounting continues to subdue the projected efficiencies in turnover of existing convenience retail floorspace.

3.34 We go on to make a number of statistical assumptions through the quantitative capacity exercise in order to account for the following variables. These are contained at Table 5 of **Appendix A** and can be summarised as:

- Utilising a 'goods based' approach, we strip out expenditure for non-food comparison goods such as clothing, household goods, CDs, DVDs and other media that are now commonly sold at major foodstores so that only the convenience goods floorspace is being considered (i.e. on a like-for-like basis with available convenience expenditure). These deductions are made in line with floorspace Figures sourced from publically available databases or, where data is not available, Nexus' professional judgement based on site visits.
  - We also make assumptions as to the gross to net convenience goods sales floorspace of each store, again utilising online planning records where available, national rates databases or Nexus' professional judgement.
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- Finally, we consider whether foodstores are likely to attract any additional 'inflow' from outside of the Study Area. In this instance, we utilise our surveys of Zone 7 (the Ards Peninsula) as well as the surveys carried out in the Republic, to estimate the likely degree of 'inflow' from surrounding areas. Based on those surveys, there is very little evidence of any 'inflow' of convenience goods trade to the District from beyond its boundaries to the east, south and north. We have also taken account of the most recent studies of areas to the north<sup>28</sup> which found that around 3-4% of convenience spending in that area flowed to the District (predominantly to Newry). Based on this survey evidence, we have therefore conservatively estimated that the Tesco, Sainsbury's, Dunnes and M&S stores in Newry are likely to attract around 5% of their turnover from outside the Study Area, and that Asda in Kilkeel attracts around 3% of its trade from outside the Study Area.

- 3.35 We then calculate the anticipated turnover of all major convenience goods operators based on the published company sales data<sup>29</sup>, referred to as 'benchmark' turnover. 'Benchmark' turnover is calculated from national average 'sales densities' (turnover per square metre). By comparing the turnover estimates derived from the findings of the Household Survey (total available expenditure distributed on the basis of each destinations market share) to the benchmark turnovers, we are able to establish where stores are trading above (overtrading) or below (under-trading) company averages.
- 3.36 Based on the household survey, we identify in Tables 3-5 of **Appendix A** that convenience retailers in the District turnover an estimated £409.5m at 2022 (£404.2m of spend from Study Area residents and £5.2m of spend from non-Study Area residents).
- 3.37 This turnover (£409.5m) far exceeds the expected benchmark trading performance of stores in the Study Area (£309.0m) and we therefore identify a significant surplus of expenditure in Table 6a (£100.4m at 2022). We then factor in population and convenience goods expenditure growth rates, as well as sales densities on existing floorspace, to project forwards that surplus expenditure to 2035. As previously noted, convenience goods growth rates are largely forecast to plateau over the period to 2035, and so growth is marginal, arising largely from population growth.
- 3.38 Figure 3.6 sets out the resultant surplus convenience goods expenditure at each assessment date.

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<sup>28</sup> Zones 1 and 2 (Banbridge area) of the City & Town Centre Retail Study for Banbridge/Newry and Mourne Area Plan 2015 (RTP, 2006).

<sup>29</sup> Data is available for the majority of UK foodstores, though not some which are more regionalised, such as Vivoxtra in NI.

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**Figure 3.6 | Gross Convenience Goods Surplus Expenditure in the Newry, Mourne and Down**

Year	Benchmark Turnover (£m)	Survey Turnover (£m)	Inflow (£m)	Surplus Expenditure (£m)
<b>2022</b>	309.0	404.2	5.2	100.4
<b>2025</b>	314.6	408.0	5.3	98.6
<b>2030</b>	315.6	414.8	5.4	104.5
<b>2035</b>	315.6	422.8	5.5	112.7

Appendix A, Table 6a

- 3.39 We then go on to consider committed and extant permissions for new convenience retail floorspace across Newry, Mourne and Down that could come forward over the next few years.
- 3.40 This includes any developments that have not been built, are currently under construction, or have opened or gained planning permission since November 2019, and so would not have been operating at the time of the Household Survey. We do not take into account proposed allocations for retail floorspace that do not benefit from extant and implementable permission over the plan period. This list of permission has been updated since our original Study to include major proposals (in excess of 100 sq m) which have been permitted over the period 2020-2022.
- 3.41 In total, these committed developments equate to a net convenience floorspace of 3,524 sq m and an estimated turnover of £28.9m (**Appendix A**, Table 6c). The largest commitment is the recent supermarket approval for a new Lidl store at the Former St Mary's Primary School in Newcastle, which is to provide an uplift of approximately 803 sq m net of retail floorspace equating to £7.1m of estimated turnover.
- 3.42 Taking account of the relatively modest amount of committed turnover, the results of our 'net' assessment show that there remains a sizable residual convenience goods expenditure, increasing from £71.5m in 2022 to £83.1m by 2035.
- 3.43 Using average sales densities to calculate a minimum floorspace scenario (a large supermarket operator) and a maximum floorspace scenario (a combination of discount foodstores operators), we calculate the net additional convenience goods capacity of between 5,500-6,000 sq m net at the current time, increasing to between 6,400-7,300sq m net in 2035. Our results are shown in Figure 3.7 below (see also Table 6d).
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**Figure 3.7 | Net quantitative 'capacity' for new convenience goods facilities in Newry, Mourne & Down**

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min	Max
<b>2022</b>	100.4	28.9	71.5	5,500	6,000
<b>2025</b>	98.6	29.5	69.2	5,400	6,200
<b>2030</b>	104.5	29.5	75.0	5,800	6,700
<b>2035</b>	112.7	29.5	83.1	6,400	7,300

Appendix A, Table 6d

- 3.44 In addition, we are also aware of a number of pending planning applications that have the potential to come forward over the plan period. Whilst we do not suggest that these be incorporated into the assessment of capacity due to their unresolved nature, the Council should be mindful of seeking updates to Figure 3.7 as and when future decisions on these applications are made.
- 3.45 The overall picture is that there is therefore a quantifiable capacity for new convenience goods floorspace within the Study Area at the present time. That capacity increases marginally to the end of the Plan period.

## Comparison Goods Capacity

- 3.46 The methodology for calculating capacity for comparison goods floorspace differs from that used to model capacity for convenience goods floorspace. The principal reason for this is that there are no robust, industry standard benchmark sales densities for calculating the turnover of smaller independent retailers that typically make up the majority of the comparison provision of town centres (although it is noted that sales densities are published for national multiple comparison retailers). Moreover, the trading levels of comparison retailers can fluctuate significantly depending on a number of localised variables, most notably the location of the retailer relative to similar providers (as customers are more likely to link multiple comparison goods trips to retailers in close proximity to each other).
- 3.47 As such, we adopt a standard approach that comparison goods retailers across the Study Area are trading 'at equilibrium' at 2022, meaning that we adopt the survey derived turnover of each facility, and examine capacity by measuring the growth in available expenditure to 2035.

**Figure 3.8 | Gross Comparison Goods Surplus Expenditure in Newry, Mourne and Down**

Year	Benchmark Turnover (£m)	Survey Turnover (£m)	Inflow (£m)	Surplus Expenditure (£m)
<b>2022</b>	310.1	282.9	27.2	0.0
<b>2025</b>	331.4	315.0	30.3	13.9
<b>2030</b>	372.4	356.6	34.3	18.6
<b>2035</b>	423.4	410.0	39.4	26.1

Appendix A, Table 26a

- 3.48 For the purposes of our assessment, we have assumed that the District's attraction to Study Area residents will remain constant at 68.3% of all spending proportionate to population growth (Table 26a). Based on the scale and location of planned developments within Newry, Mourne and Down, as well as those outside of it, we consider this a robust basis for analysis. In particular, we are not aware of any significant retail development nearby the District, which might exert a significant pull on District residents, nor of any significant development within the District which would be likely to significantly increase its market share.
- 3.49 We then consider committed and extant planning permissions for new comparison retail floorspace across Newry, Mourne and Down that are likely to come forward over the next few years. This includes any developments that are currently under construction, or have opened or been granted planning permission since November 2019, and so would not have been operating at the time of the Household Survey. In the same way as we viewed convenience goods, we do not take into account proposed allocations for retail floorspace in the emerging Local Development Plan that do not benefit from extant and implementable permission over the plan period.
- 3.50 In total, these committed developments equate to a net comparison goods floorspace of 1,871 sq m and an estimated turnover of £8.4m (see Table 26c at **Appendix A**). These commitments are then deducted from the surplus expenditure set out in Figure 3.8. Once accounted for, we are able to calculate the net comparison goods capacity.
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**Figure 3.16 | Net quantitative 'capacity' for new comparison goods facilities in Newry, Mourne & Down**

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min	Max
<b>2025</b>	13.9	9.0	4.9	800	1,300
<b>2030</b>	18.6	10.1	8.5	1,300	2,000
<b>2035</b>	26.1	11.5	14.6	1,900	3,000

Appendix A, Table 26d

3.51 The updated forecast shows that there will be a moderate capacity for between 800-1,300 sq m net of comparison goods floorspace at 2025, increasing by 2035 to between 1,900-3,000 sq m net floorspace).

## 4.0 Town Centre Composition

### Introduction

- 4.1 In our original Study, we provided a quantitative analysis of the composition of the main town centres within Newry, Mourne and Down District. That composition analysis, then informed the recommendations we reached in the recommendations assessment. Given the impacts highlighted in Section 2 of this Study in respect of the Covid pandemic in particular, we have therefore sought to re-survey each of the 12 centres previously considered, in order to chart how they have fared over the period 2019 to 2022.

### Methodology

- 4.2 Our town centre composition assessments build upon our analysis of market trends and quantitative capacity in the previous sections. We do so through new empirical evidence; acquired from Experian Goad, and our own composition assessments recorded across site visits (see **Appendix B**).
- 4.3 Nexus re-visited each of the twelve centres to undertake surveys, based around the Town Centre boundary designations. Where available (Newry, Downpatrick and Newcastle), these surveys also used Experian Goad maps for additional detail.
- 4.4 The categories used for the surveys are defined as follows:
- **Convenience:** Everyday essential items, such as food.
  - **Comparison:** Retail items not bought on a frequent basis, for example televisions and white goods (fridges, dishwashers etc.).
  - **Retail Services:** Comprising the likes of dry cleaners, health & beauty, opticians, photo processing, post offices and travel agents.
  - **Leisure Services:** Leisure units which includes bars, cafés, cinemas, nightclubs, takeaways, hotels, pubs and restaurants. For clarity, it does not include facilities for leisure pursuits e.g. sports centres, swimming pools or health & fitness clubs.
  - **Financial & Business Services:** Comprising the likes of banks, building societies, employment agencies, legal services, estate agents and business services.
  - **Vacant:** Unoccupied, abandoned, under alterations or undergoing redevelopment.
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- 4.5 We have then contrast the composition of the town centres to the comparable data we obtained in 2019, as well as UK averages using data supplied by Experian Goad. In each instance below, we carry out an overview assessment of each centres composition, supported by a land-use plan of the centre.

## **Newry**

### **Description & Status**

- 4.5 Newry City Centre is located to the west of the District, approximately 34 miles from Belfast.
- 4.6 The River Clanrye and Newry Canal divide the city with The Butter Crane and The Quays shopping centres to the east bank of the River along with Monaghan Street and the Old Creamery Retail Park. On the west bank of the River is Hill Street, which is the traditional heart of the City and includes the Newry Variety Market, the Town Hall and the main public library.
- 4.7 Newry is well connected by Bus and a large Ulsterbus Station is located on the west side of the River on The Mall close to the traditional heart of the City.
- 4.8 The largest provision of out-of-centre floorspace in the District, Damolly Retail Park, is situated to the north of the city and is easily accessible from the A1 (connecting Belfast to Dublin). The Park is home to a number of larger footprint retail stores including Lidl, Next at Home, and B&Q. A large NISA extra store is located opposite Damolly Retail Park at the Fiveways Centre.
- 4.9 A Tesco Extra foodstore is located out of the City Centre, just under a mile to the north.
- 4.10 The part of the City Centre to the east of the River is included in a Conservation Area and includes John Mitchell Place, St Mary's Street, Hill Street and the Mall.
- 4.11 Newry is designated as Tier 1: City and Main Town within the proposed Settlement Hierarchy (Newry, Mourne and Down Local Development Plan Preferred Options Paper 2030).
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## Experian Goad Land-use Plan

Please refer to **Appendix B** for a fully readable version of this plan.



## **Composition**

	Units (#) 2019	Units (%) 2019	Unit (#) 2022	Units (%) 2022	Units (%) UK Avg. Oct 2021
Convenience	34	7.3%	27	6.2%	9.2%
Comparison	156	33.4%	134	30.9%	27.1%
Retail Services	62	13.3%	62	14.3%	15.6%
Leisure Services	81	17.3%	77	17.8%	24.6%
Financial and Business Services	46	9.9%	40	9.2%	9.1%
Vacant	88	18.8%	93	21.5%	14.2%
<b>TOTAL</b>	<b>467</b>	<b>100.0%</b>	<b>433</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Experian Goad, Nexus Planning health checks 2019 and 2022

## **Retailer Representation**

- 4.12 Our composition survey found that there are now 433 units in the centre, a significant reduction of 34 units since the previous health checks were undertaken in 2019. There are several factors regarding the reduction in units, including the demolition of units on Brooke Street to create a car park for the new Lidl, a number of amalgamations including four vacant units on Hill Street being converted into a Therapy Centre, and a number of conversions to residential use on the periphery of the Centre.
- 4.13 There has been a reduction of convenience units in the centre since the previous Study and the convenience provision is now 3 percentage points lower than the UK national average (6.2% compared to 9.2%). Losses include several bakers and vape shops. However, a Lidl has opened in the Buttercrane Shopping Centre. There are several large out of town supermarkets in close proximity to Newry City Centre, which accounts for the low provision within the centre itself.
- 4.14 Comparison units have also decreased slightly, by 2.5 percentage points to 30.9% of units, however this is still slightly above the UK average of 27.1%. Most significantly, The Quays Shopping Centre has suffered several losses. At the time of the previous Study there were three vacant units, which has risen to 10 units as at February 2022. Losses include the large Debenhams store, Dorothy Perkins, Burtons, Top Shop/Top Man, Pandora, Oasis, Sports Direct and Carphone Warehouse. The level of vacancies in the Buttercrane Shopping Centre's has remained broadly consistent, however the former anchor Marks
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and Spencer (vacant at the time of the previous health checks) is now occupied by Sports Direct and Lidl is also now operating within the centre.

- 4.15 There is a good presence of national multiple comparison retailers in Newry City Centre, which are likely to be central to its overall appeal. Multiples trading in Newry include Next, Marks and Spencer and Argos. Experian Goad Category Reports identify a list of 31 national multiples that have been identified as 'major' retailers. However, it should be noted that five of these multiples have ceased trading since the previous update. All five of these traders (Debenhams, Top Shop/Man, Dorothy Perkins and Burtons) previously traded in The Quays Shopping Centre.
- 4.16 In terms of service provision, the composition of the centre shares some similarities to the UK national average, with both retail and financial and business services within 1% of those averages. There is a lower proportion of leisure services (17.8% compared to 24.6%). All the service categories have remained broadly consistent since the previous health check was undertaken.

### **Vacancies**

- 4.17 The current level of vacant units in the centre stands at 21.5% and is higher than the UK national average (14.6%). This figure has increased by 2.7 percentage points since our previous survey and there are now 93 vacant units overall. A significant number of the vacancies can be found on the Mall and St Mary's Street, as well as within the two indoor shopping centres.

### **Physical Structure and Environmental Quality**

- 4.18 No significant change were noted between health checks undertaken in October 2019 and February 2022. The environmental quality in Newry was still found to be varied.
- 4.19 The Buttercrane and Quays shopping centres lack active frontages, which can significantly affect people's perceptions of a public space in terms of its safety, comfort, sociability and liveliness. The shopping centres were also found to be difficult to access by pedestrians, with complex crossing systems at busy junctions. An attractive area of planting has though been added outside the Buttercrane Centre.
- 4.20 Merchants Quay, adjacent to the canal looked to be well maintained with attractive tree planting and seating making the area appear pleasant. The current use of the central area as a series of car parks, between the canal and the River Clanrye, detracts from the views in this part of the city.
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- 4.21 On the opposite side of the River, Hill Street is situated at the traditional heart of the City Centre and comprises of a range of largely independent businesses, including comparison and convenience uses and includes the attractive Cathedral of St. Patrick and St. Colman. Public realm improvements are evident at points along Hill Street, including at St Marcus Square where new paving, seating and public art are evident adding to the attractiveness of the area. A modern office redevelopment in this area improves the surroundings, however the quality of some shopfronts could benefit from improvement to further enhance the space.
- 4.22 Further along Hill Street, in the vicinity of the former Dunnes store, there is an area of poor quality shopfronts and pavements, make this area of the town less attractive to visit. This also detracts from the Variety Market.
- 4.23 Units along The Mall adjacent to the River, as far as Needham Bridge, are largely unattractive and lack an active frontage, which would suggest this to be an area of opportunity.

### **Summary**

- 4.25 There have been notable changes in Newry over the period 2019-2022. The provision of national multiple stores has declined significantly, especially within The Quays Shopping Centre. There has also been a significant reduction in the number of town centre use units present in the centre, with 34 less units now than there was in 2019. Some of this will be beneficial though, with long-time vacant units being more beneficially used for residential use, especially on the fringes of the City Centre.
- 4.26 The centre is a largely pleasant environment, although opportunity for further improvements exist throughout the centre. Examples include The Mall, which largely has its back turned to the river, which remains a missed opportunity.
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# **Downpatrick**

## **Description & Status**

- 4.28 Downpatrick is located to the east of the District, 23 miles from Belfast.
- 4.29 The main retail area of Downpatrick comprises Market Street, the main shopping street joining with St Patricks Avenue and Irish Avenue, as well as Church Street and Scotch Street found to the north of the town.
- 4.30 Downpatrick Town Centre has been designated as a Conservation area and includes a number of landmark buildings.
- 4.31 Downpatrick is designated as Tier 1: City and Main Town within the proposed Settlement Hierarchy (Newry, Mourne and Down Local Development Plan Preferred Options Paper 2030).

## **Experian Goad Land-use Plan**

4.33 Please refer to **Appendix B** for a fully readable version of this plan.



Key = Yellow (convenience), Orange (comparison), Red (retail services), Light blue (leisure services), Purple (financial and business services), Dark blue (vacant).

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## **Composition**

	Units (#) 2019	Units (%) 2019	Unit (#) 2022	Units (%) 2022	Units (%) UK Avg. Oct 2021
Convenience	18	8.2%	16	8.0%	9.2%
Comparison	60	28.8%	56	27.9%	27.1%
Retail Services	25	12.0%	26	13.4%	15.6%
Leisure Services	42	20.7%	42	20.9%	24.6%
Financial and Business Services	25	12.0%	22	10.9%	9.1%
Vacant	38	18.3%	39	19.4%	14.2%
<b>TOTAL</b>	<b>208</b>	<b>100.0%</b>	<b>201</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Experian Goad, Nexus Planning health checks 2019 and 2022

## **Health-Check Indicators**

### **Retailer Representation**

- 4.34 Our composition survey found that there are 201 units in the centre, a reduction of seven units since the previous Study was undertaken. The composition of the centre shares similarities to the UK national averages.
- 4.35 Convenience shopping is slightly lower than the average at 8.0% compared to 9.2% and remains comparable to the previous survey. There is a large Asda superstore and Lidl found to the south of Downpatrick as well as a number of butchers, bakers and off licences throughout the centre.
- 4.36 Comparison shopping is slightly above the average at 27.9% compared with 27.1%. The offer available within the town centre includes a mix of national multiples (New Look, Argos and Halfords) as well as independent retailers.
- 4.37 There is a lower proportion of leisure services (20.9% compared to 24.6%) which remains consistent since 2019. There is also a lower proportion of retail services (13.4% compared to 15.6%), although there has been a minor increase since the previous health check. Financial and business services exceed the average at 10.9% compared to 9.1%, with several banks located in the centre, although the Bank of Ireland has become vacant since the previous study.
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## **Vacancies**

- 4.38 The level of vacant units in the centre is 19.4% and exceeds the UK national average of 14.2%. The overall level of vacancy has increased by one unit since the previous health check was undertaken. Vacancies are spread throughout Downpatrick, although concentrations of vacant units can be found in Market Lane and Scotch Street.

## **Physical Structure and Environmental Quality**

- 4.39 No significant change were noted between health checks undertaken in 2019 and 2022 in these respects.
- 4.40 Downpatrick remains a car-dominated environment with a large amount of through traffic reducing the environmental quality of the centre.
- 4.41 There are improvements to be made in increasing the permeability, of the pedestrian route between Asda and the town centre. There remains a physical barrier on the route from Asda to the main retail area of Downpatrick by way of a strip of unused land with fencing on both sides, which prevents people from easily taking the natural desire line.
- 4.42 Whilst Downpatrick has many positive attributes, including many attractive buildings, overall the centre has a feeling of neglect. Although public realm improvements have been made in Scotch Street, the level of vacancies along with several derelict buildings are detrimental to this area of the centre. A vacant plot on the corner of St Patrick's Avenue and Market Street displays street art masking that the area is not in current use.
- 4.43 Since the previous health check was undertaken the derelict buildings along Irish Street, including the former police station, are now being marketed as a development opportunity and a display is now notable along Irish Street, branded as "Connecting Stories in 1724", creating interest and improving the look of the area.
- 4.44 The general quality of shopfronts in the centre would benefit from improvement.
- 4.45 There is a pleasant area outside the Saint Patrick Centre which is well maintained and of good environmental quality.
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## **Summary**

- 4.46 Whilst there have been some changes in terms of the composition of the centre, Downpatrick is performing broadly in line with UK national averages and functions well as a centre, catering for the majority of retail and service needs expected to be found in a settlement of this size.
  - 4.47 Environmental improvements to public realm and shop fronts, would make the centre appear more welcoming, especially considering the number of derelict buildings located in the centre
  - 4.48 Other opportunities for the centre include creating pedestrian links to Asda from the centre via the car park area to encourage visits between both areas of the town.
  - 4.49 Our previous health checks recommended the Downpatrick should capitalise on the historic links of Downpatrick and the Irish Street – the 'Connecting Stories' initiative is noted as being a positive improvement in this regard.
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# **Newcastle**

## **Description & Status**

- 4.51 Newcastle Town Centre is located 32.5 miles from Belfast and is a small seaside resort town by the Irish Sea.
  - 4.52 The town centre extends in a linear form from Railway Street and Donard Street to the north along Main Street, which runs parallel to the seafront, and extends along Central Promenade.
  - 4.53 The uses in the centre reflect its primary function as a tourist resort with a large number of takeaways, amusement arcades, gift shops, public houses and a variety of tourist accommodation. Amusement Arcades are concentrated to the south of the Shimna Bridge.
  - 4.54 A Tesco store is located a short distance out-of-centre on Castlewellan Road.
  - 4.55 Newcastle is designated as Tier 2: Local & Small Towns within the proposed Settlement Hierarchy (Newry, Mourne and Down Local Development Plan Preferred Options Paper 2030).
-

## **Experian Goad Land-use Plan**

Please refer to **Appendix B** for a fully readable version of this plan.



Key = Yellow (convenience), Orange (comparison), Red (retail services), Light blue (leisure services), Purple (financial and business services), Dark blue (vacant).

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## **Composition**

	Units (#) 2019	Units (%) 2019	Unit (#) 2022	Units (%) 2022	Units (%) UK Avg. Oct 2021
Convenience	15	9.9%	16	10.7%	9.2%
Comparison	49	32.5%	44	29.5%	27.1%
Retail Services	12	12.6%	21	14.1%	15.6%
Leisure Services	45	29.8%	48	32.2%	24.6%
Financial and Business Services	10	6.6%	8	5.4%	9.1%
Vacant	13	8.6%	12	8.1%	14.2%
<b>TOTAL</b>	<b>151</b>	<b>100%</b>	<b>149</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Experian Goad, Nexus Planning health checks 2019 and 2022

## **Health-Check Indicators**

### **Retailer Representation**

- 4.56 Our composition survey above finds that there are 149 units in the centre, a reduction of two units since the previous visit.
- 4.57 The composition of the centre is similar in several respects to the UK national average, with convenience units slightly higher than average at 10.9% compared to 9.2% and comparison units also above the average of 27.1% at 29.5%.
- 4.58 Convenience units within the centre includes a Lidl, a number of butchers, bakeries and newsagents. At the time of the previous report a planning permission had been granted for a new Lidl store outside of the town centre. Although the store currently remains in the town a more detailed application was approved in November 2021, and so we assume that this store will close in a relatively short timeframe.
- 4.59 There has been a reduction in the number of units in comparison use since the previous health checks were undertaken (five), however the proportion of units remains above the UK national average and comprises predominately independent stores.
-

- 4.60 As would be expected considering the location of Newcastle on the coast and its reliance on tourism, there is a higher proportion of leisure services with a large number of cafes and restaurants located in the town (32.2% compared to an average of 24.6%). A street food market, called Box Street, has emerged since our previous surveys. Retail services are comparable to the average (14.1% compared to 15.6%). The figures suggest that Newcastle remains working well as a centre fulfilling the needs of the local population as well as acting as a tourist destination.

### **Vacancies**

- 4.61 The level of vacant units in the centre (8.1%) is significantly lower than the UK national average (14.2%) indicating that the centre is performing well in this respect. This has remained consistent since the previous health checks were undertaken.

### **Physical Structure and Environmental Quality**

- 4.62 No significant change were noted between the health checks.
- 4.63 Overall, the environmental quality of Newcastle remains good, however, it is a car dominated environment with local and through traffic using the town centre streets, causing congestion which we understand can be detrimental to the town centre environment in the high season.
- 4.64 The architectural styles of the buildings towards the northern end of Main Street were found to be of high quality, although many of the upper level units appear to be underutilised. The units towards the Shimna Bridge are more modern in appearance.
- 4.65 The paving appeared to be in good condition and the street furniture uncluttered. Evidence of seating and planting was witnessed in several areas which, in the summer months, would provide a pleasant environment. No litter or graffiti was witnessed at the time of our most recent visit.

### **Summary**

- 4.66 Newcastle Town Centre has natural advantages – a compact centre with high environmental quality in parts, and its location on the coast ensuring a trade in tourism. The centre continues to perform well in terms of retail and services provided, coupled with the low amount of vacant units, Newcastle is considered to be a healthy and vibrant town.
-

- 4.67 There remains the likelihood that Lidl will relocate from the northern end of the centre to an out of centre location, creating an opportunity to provide alternative uses in its place.
- 4.68 The Mourne Gateway project to encourage further tourism into the centre is to be encouraged.

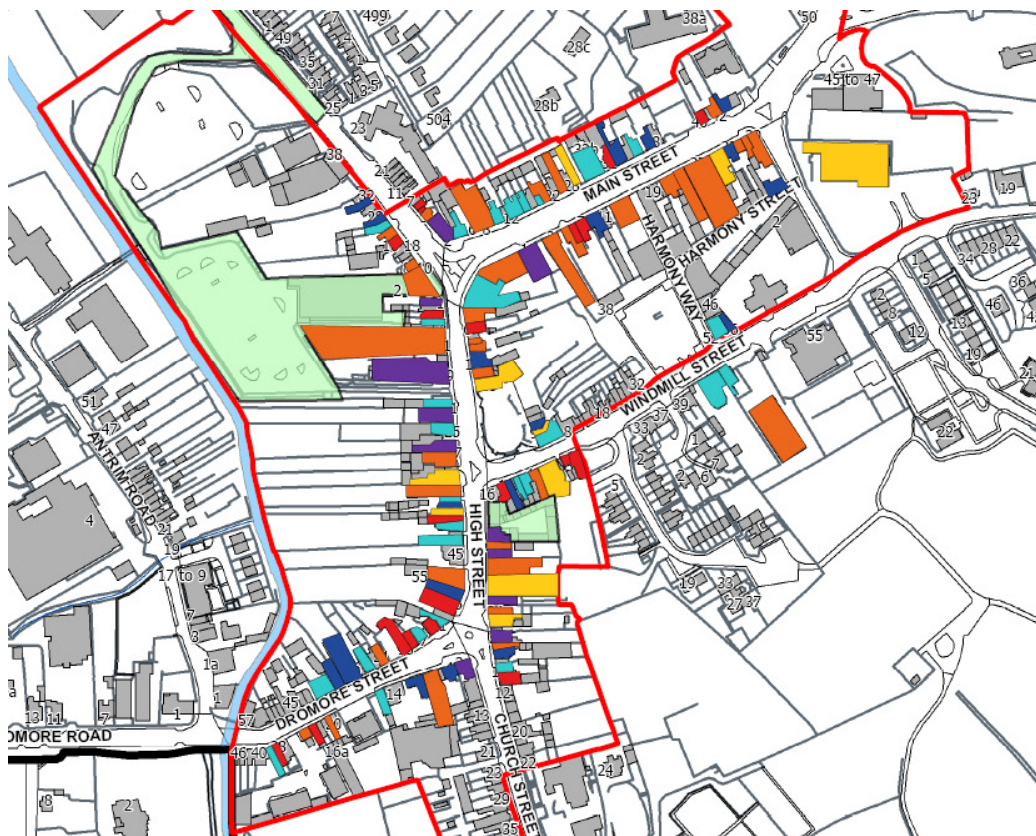
# Ballynahinch

## Description & Status

- 4.69 Ballynahinch Town Centre is located 15 miles to the south of Belfast.
- 4.70 Ballynahinch is a compact centre, with shops and services concentrated along Main Street, High Street, Windmill Street and Dromore Street. Car parking can be found to the rear of units behind Main Street. A Tesco store is located a short distance out-of-centre on Castlewella Road.
- 4.71 Ballynahinch is designated as Tier 2: Local & Small Towns within the proposed Settlement Hierarchy (Newry, Mourne and Down Local Development Plan Preferred Options Paper 2030).

## Experian Goad Land-use Plan

Please refer to **Appendix B** for a fully readable version of this plan.



Key = Yellow (convenience), Orange (comparison), Red (retail services), Light blue (leisure services), Purple (financial and business services), Dark blue (vacant).

## **Composition**

	Units (#) 2019	Units (%) 2019	Unit (#) 2022	Units (%) 2022	Units (%) UK Avg. Oct 2021
Convenience	9	7.6%	11	9.2%	9.2%
Comparison	32	27.1%	33	27.7%	27.1%
Retail Services	21	17.8%	17	14.3%	15.6%
Leisure Services	24	20.3%	27	22.7%	24.6%
Financial and Business Services	10	8.5%	12	10.1%	9.1%
Vacant	22	18.6%	19	16.0%	14.2%
<b>TOTAL</b>	<b>118</b>	<b>100.0%</b>	<b>119</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Experian Goad, Nexus Planning health checks 2019 and 2022

## **Health-Check Indicators**

### **Retailer Representation**

- 4.72 Our composition survey finds that there are 119 units in the centre and that in terms of percentage points, the centre shares many similarities to the UK national averages.
- 4.73 The number of convenience units has increased since the previous Study was undertaken (an increase of two units/ 1.6 percentage points and is now identical to the UK national average. The offer comprises a Lidl and Iceland supermarket as well as a variety of butchers, bakers and newsagents.
- 4.74 Comparison units are also comparable to the UK national average (27.7% compared to 27.1%) and has seen little change in terms of percentage points since the previous health checks were undertaken. The centre is made up of predominately independent retailers and includes a number of specialist DIY stores to the north of the centre.
- 4.75 There is a slightly lower proportion of leisure services (22.7% compared to 24.6%) and retail services (14.3% compared 15.6%), whilst financial and business services are slightly higher than the UK national average (10.1% compared to 9.1%).
-

- 4.76 Overall, Ballynahinch continues to offer a good proportion of retail units and services, although clothing and footwear offer is limited.

### **Vacancies**

- 4.77 There has been an improvement in the level of vacancies in the centre, but at 16.0% it still slightly exceeds the UK national average (14.2%). A large proportion of the vacancies can be found on Dromore Street, which adds to the neglected feel of this part of town.

### **Physical Structure and Environmental Quality**

- 4.78 No significant changes were noted from the previous health checks undertaken.
- 4.79 Ballynahinch is a car dominated environment with the A24 running through the town encouraging a high volume of traffic. On-street parking is available throughout the centre but this is to the detriment of pedestrians.
- 4.80 The buildings throughout Ballynahinch are predominately two storeys with few considered to have any significant architectural merit, although exceptions include the Town Hall on Market Square and Danske Bank.
- 4.81 Market Square has the potential to be a pleasant central area for the town, with the attractive aforementioned Town Hall and the inclusion of public art, however, the large abandoned steel structure remains present and detracts from the environment.
- 4.82 Public realm improvements are evident along Main Street and similar improvements would be of benefit if carried out throughout the remainder of the centre.
- 4.83 The large amount of vacancies of Dromore Street detract from this area of the centre, which would also benefit from shop front improvements, along with units in High Street.
- 4.84 No litter of graffiti was witnessed at the time of the site visit.

### **Summary**

- 4.85 Ballynahinch is a compact centre with high environmental quality in parts. The centre works well in terms of services provided and convenience shopping with the composition of the centre being broadly in line with the UK national averages.
-

- 4.86 Improved accessibility to the Windmill Street car park may encourage use and ease demand for on-street parking.
- 4.87 As with many towns, Ballynahinch suffers from heavy traffic, due to the A24 running through the centre. A bypass is planned to run round the eastern periphery of the town, and latest updates suggests that the scheme was approved by Ministers in March 2021 in readiness for funding becoming available.
- 4.88 The removal of the steel structure in the Market Square would improve the immediate area and views across the town.
-

# Warrenpoint

## Description & Status

- 4.89 Warrenpoint is located 10 miles to the south east of Newry City, on the A2 route linking with Newry and Kilkeel.
- 4.90 Due to the location of Warrenpoint on the coast, it benefits from tourism as a resort town with a strong focus on the Harbour. The retail area of the town is on The Square and Church Street, and also partially along a small stretch of Duke Street.
- 4.91 Warrenpoint is designated as Tier 2: Local & Small Towns within the proposed Settlement Hierarchy (Newry, Mourne and Down Local Development Plan Preferred Options Paper 2030).

## Experian Goad Land-use Plan

- 4.92 Please refer to **Appendix B** for a fully readable version of this plan.



Key = Yellow (convenience), Orange (comparison), Red (retail services), Light blue (leisure services), Purple (financial and business services), Dark blue (vacant).

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## **Composition**

	Units (#) 2019	Units (%) 2019	Unit (#) 2022	Units (%) 2022	Units (%) UK Avg. Oct 2021
Convenience	10	11.4%	10	10.9%	9.2%
Comparison	15	17.0%	18	19.6%	27.1%
Retail Services	12	13.6%	15	16.3%	15.6%
Leisure Services	26	29.5%	29	31.5%	24.6%
Financial and Business Services	7	8.0%	10	10.9%	9.1%
Vacant	18	20.5%	10	10.9%	14.2%
<b>TOTAL</b>	<b>88</b>	<b>100.0%</b>	<b>92</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Experian Goad, Nexus Planning health checks 2019 and 2022

### **Retailer Representation**

- 4.93 Our composition survey above finds that there are 92 units in the centre an increase of four units since the previous health check.
- 4.94 The number of convenience units in the centre has remained consistent since the previous Study and the convenience provision remains slightly higher than the UK national average (10.9% compared to 9.2%).
- 4.95 Comparison units have increased slightly, by 2.7 percentage points, however is still significantly below the average of 27.1% with only 19.3% of units providing comparison goods. However, due to the tourist nature of the town and its proximity to Newry, this would not be unexpected.
- 4.96 In terms of service provision within the centre retail services are in line with the UK national average (16.3% compared to 15.6%) a slight increase since the previous health checks. Financial and business services have increased by 3 units to 10.9% (higher than the average of 9.1%). The Leisure service provision in the centre remains strong and has increased by 2 percentage points and is higher than the UK national average (31.5% compared to 24.6%).
-

## **Vacancies**

- 4.97 The level of vacant units in the centre (10.9%) and is lower than the UK national average (14.6%). Since the previous health checks were undertaken this figure has improved by 9.6 percentage points with new units having taken over previous vacant premises and indicates that the centre is doing well in terms of vitality and viability.

## **Physical Structure and Environmental Quality**

- 4.98 No significant change were noted between health checks undertaken.
- 4.99 Warrenpoint Town Centre is a pleasant coastal town and overall, the environmental quality was found to be good.
- 4.100 As with many towns, it is a car dominated environment with local and through traffic, causing congestion and the large car parking area on The Square detracting from the area.
- 4.101 The Victorian character and quality of architecture of the area creates an attractive town centre environment and the shop fronts are largely of good quality.

## **Conclusions**

- 4.102 Warrenpoint Town Centre is fortunate to have natural advantages in terms of its location on the coast, lending itself to position the town as a tourist destination, focusing predominately on leisure services, although this has had an adverse effect on the availability of comparison goods in the centre. However, the composition of the centre is otherwise broadly in line with UK national averages.
-

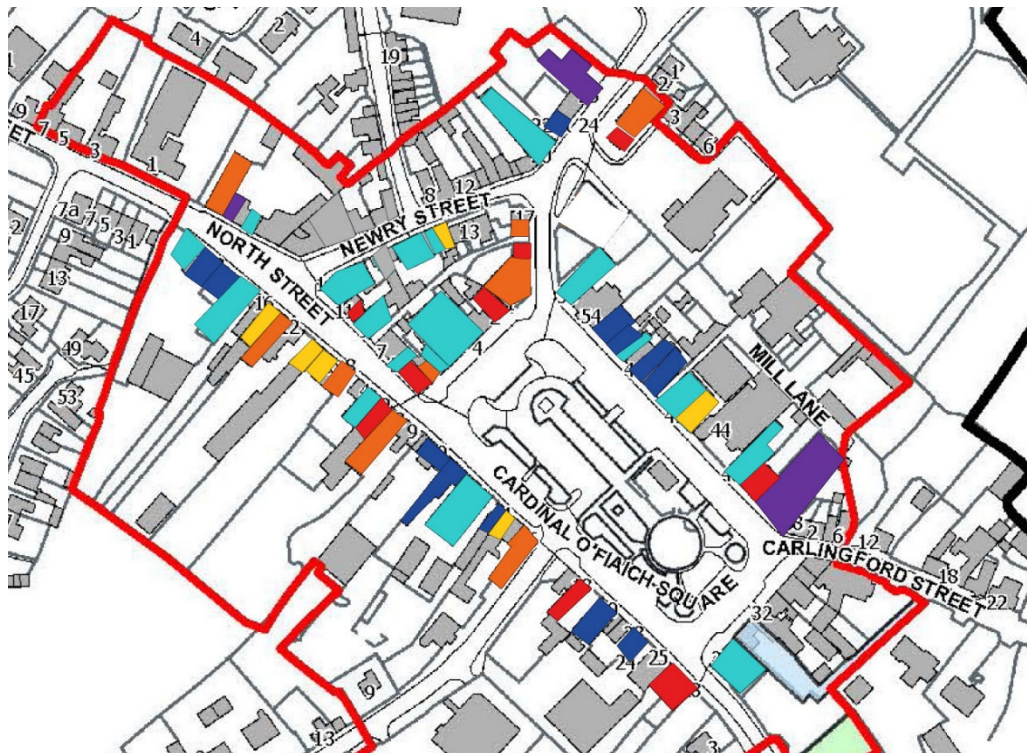
# Crossmaglen

## Description & Status

- 4.103 Crossmaglen is a small town approximately 25 miles south west of Newry and is located close to the border with the Republic of Ireland.
- 4.104 The retail core of the town is set around Cardinal O Fiaich Square, where car parking to service the town is also located, with additional units along North Street.
- 4.105 Crossmaglen is designated as Tier 2: Local & Small Towns within the proposed Settlement Hierarchy (Newry, Mourne and Down Local Development Plan Preferred Options Paper 2030).

## Experian Goad Land-use Plan

- 4.106 Please refer to **Appendix B** for a fully readable version of this plan.



Key = Yellow (convenience), Orange (comparison), Red (retail services), Light blue (leisure services), Purple (financial and business services), Dark blue (vacant).

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## **Composition**

	Units (#) 2019	Units (%) 2019	Unit (#) 2022	Units (%) 2022	Units (%) UK Avg. Oct 2021
Convenience	8	14.3%	6	10.3%	9.2%
Comparison	8	14.3%	10	17.2%	27.1%
Retail Services	8	14.3%	9	15.5%	15.6%
Leisure Services	15	26.8%	18	31.0%	24.6%
Financial and Business Services	4	7.1%	3	5.2%	9.1%
Vacant	13	23.2%	12	20.7%	14.2%
<b>TOTAL</b>	<b>56</b>	<b>100.0%</b>	<b>58</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Experian Goad, Nexus Planning health checks 2019 and 2022

### **Retailer Representation**

- 4.107 Our composition survey above finds that there are 58 units in the centre, an increase of two units since the previous health check.
- 4.108 The number of convenience units in the centre has decreased by two units with the closure of a bakery and a convenience store in the centre. However, the convenience provision remains slightly higher than the UK national average (10.3% compared to 9.2%). The offer comprises two butchers, as well as a newsagent, bakery, an off-licence and a Centra store.
- 4.109 Comparison units have also increased slightly, by 2.9 percentage points. However, provision is still significantly below the UK average of 27.1%, with only 17.2% of units providing comparison goods. The comparison units in the centre do provide some niche shops for a centre of its size including a lighting store, independent sports store and jewellers.
- 4.110 In terms of service provision within the centre retail services are in line with the UK national average (15.5% compared to 15.6%), which is a slight increase since the previous health checks. Financial and business services have reduced by one unit to 5.2% (lower than the average of 9.1%). The Leisure service provision in the centre is strong and has increased by 3.2 percentage points and is higher than the UK national average (31.0% compared to 24.6%).
-

### **Vacancies**

- 4.111 The level of vacant units in the centre (20.7%) exceeds the UK national average (14.6%). Since the previous health checks were undertaken, a number of vacant units in Newry Street have been converted to residential use, however, one further vacant unit is now found in the centre.

### **Physical Structure and Environmental Quality**

- 4.112 No significant change were noted between health checks undertaken.
- 4.113 The majority of the retail core sits around the Cardinal O’Fiaich Square which has seen environmental and landscape improvements and has created a pleasant and attractive town centre environment. However, the square is surrounding by on-street parking, as well as a car park in the square, which makes the area a car dominated environment, a large amount of through traffic and lack of pedestrian crossings also give a sense of being difficult to navigate when walking.

### **Summary**

- 4.114 Crossmaglen is a largely well-kept centre which offers a range of functions to its immediate population and remains broadly similar in terms of composition since the previous health checks were undertaken.
-

# Kilkeel

## Description & Status

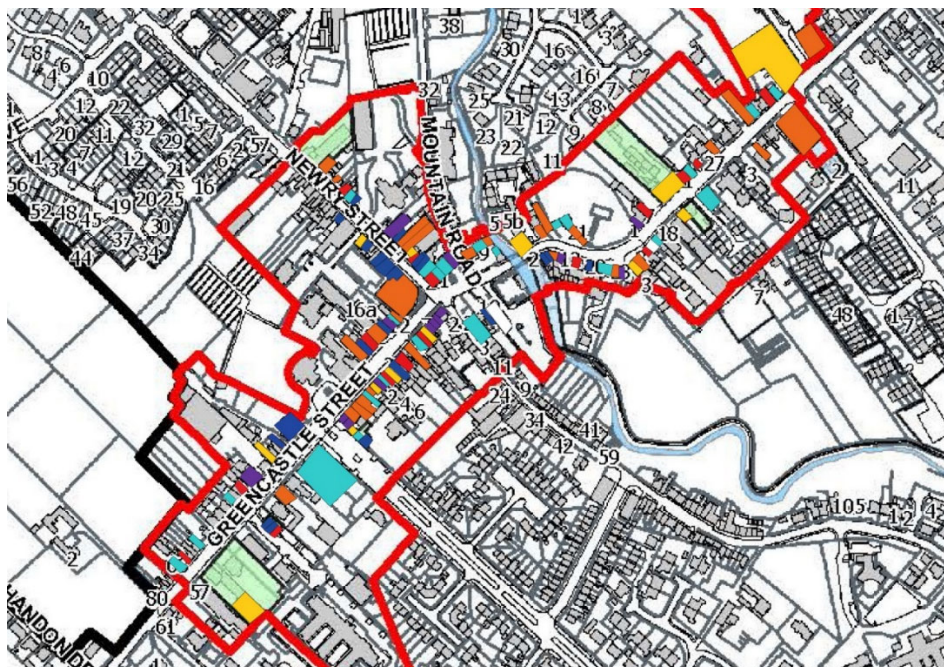
4.115 Kilkeel is the southern-most town in Northern Ireland, located 20 miles southeast of Newry and 12 miles east of Warrenpoint.

4.116 The main commercial and retail areas within the town centre itself are focused on the town's two main thoroughfares, namely Newry Road/Newcastle Street and Greencastle Street/Bridge Street. The town has a coastal setting based around an established harbour, with a backdrop to the north provided by the Mourne Mountains.

4.117 Kilkeel is designated as Tier 2: Local & Small Towns within the proposed Settlement Hierarchy (Newry, Mourne and Down Local Development Plan Preferred Options Paper 2030).

## Experian Goad Land-use Plan

Please refer to **Appendix B** for a fully readable version of this plan.



Key = Yellow (convenience), Orange (comparison), Red (retail services), Light blue (leisure services), Purple (financial and business services), Dark blue (vacant).

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## **Composition**

	Units (#) 2019	Units (%) 2019	Unit (#) 2022	Units (%) 2022	Units (%) UK Avg. Oct 2021
Convenience	9	8.0%	12	10.6%	9.2%
Comparison	24	21.2%	26	23.0%	27.1%
Retail Services	19	16.8%	17	15.0%	15.6%
Leisure Services	24	21.2%	25	22.1%	24.6%
Financial and Business Services	13	11.5%	13	11.5%	9.1%
Vacant	24	21.2%	20	17.7%	14.2%
<b>TOTAL</b>	<b>113</b>	<b>100.0%</b>	<b>113</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Experian Goad, Nexus Planning health checks 2019 and 2022

### **Retailer Representation**

- 4.118 Our composition survey finds that there are 113 units in the centre with the composition of the centre being broadly similar to the UK national average.
- 4.119 The number of convenience units in the centre has increased by 2.6 percentage points and now slightly exceeds the UK national average (10.6% compared with 9.2%). The units include three butchers, two newsagents, two vape shops, an off-licence and fishmonger, as well as an Asda supermarket, Eurospar and Bulgarian convenience store.
- 4.120 Comparison units have also increased slightly, however, at 23.0% are still slightly below the UK average of 27.1%. The majority of comparison traders are independent retailers.
- 4.121 In terms of service provision within the centre, retail services are in line with the UK national average (15.0% compared to 15.6%). Financial and business services remain unchanged at 11.5% (slightly higher than the average of 9.1%), whilst leisure services have increased by one unit but remains below the UK national average (22.1% compared to 24.6%).
-

## **Vacancies**

- 4.122 The level of vacant units in the centre (17.7%) exceeds the UK national average (14.6%). However, there has been a notable reduction of 3.5 percentage points since the previous health checks were undertaken. Currently vacant units are spread throughout the centre, although there is a concentration of vacancies along Newry Street.

## **Physical Structure and Environmental Quality**

- 4.124 Kilkeel is a town that would benefit from several areas of improvement. Whilst architectural quality is of a reasonable standard, some areas of the town feel neglected. The shopfronts in the centre are in many cases in need of improvement with several areas looking particularly neglected, for example on Bridge Street by the river and along Newry Street. A large empty plot on Bridge Street between Tariq's Turkish Barbers and Q Financial would appear to provide a development opportunity within the centre.
- 4.125 The centre is car dominated in terms of through traffic and the traffic lights at the main crossroads in the centre. There is also a large amount of on-street parking with limited capacity during the day. Notwithstanding, our observations were that the centre functions well for the most part, though there are pedestrian safety concerns due to the lack of pedestrian crossings between the crossings by the Asda superstore and the crossroads.

## **Summary**

- 4.126 The centre is currently performing broadly in line with UK national averages in terms of composition and serves the local area well. The number of vacancies are of slight concern, especially the concentration of empty units on Newry Street.
- 4.127 Kilkeel is a town centre with potential, the unusual layout, topography, underutilised river area and opportunity to strengthen links with the harbour and sea would suggest that the town could be a destination, much like nearby Newcastle. Public realm improvements throughout the centre would be beneficial, as would a shop front scheme to enhance the attractiveness of the centre.
-

# Newtownhamilton

## **Description & Status**

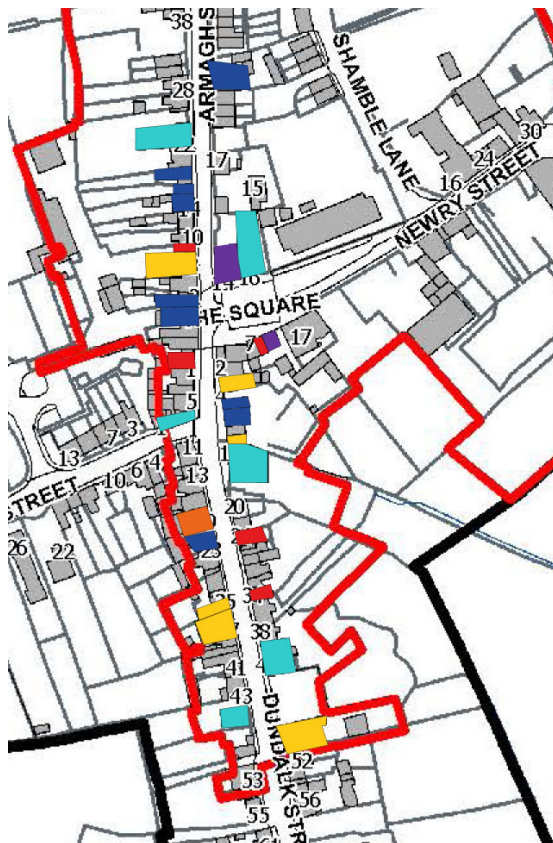
4.128 Newtownhamilton Town Centre is located approximately 11 miles west of Newry.

4.129 The town centre is linear, running along Dundalk / Armagh Street (A29) with a small number of units on The Square.

4.130 Newtownhamilton is designated as Tier 3: Villages within the proposed Settlement Hierarchy (Newry, Mourne and Down Local Development Plan Preferred Options Paper 2030).

## **Experian Goad Land-use Plan**

4.131 Please refer to **Appendix B** for a fully readable version of this plan.



Key = Yellow (convenience), Orange (comparison), Red (retail services), Light blue (leisure services), Purple (financial and business services), Dark blue (vacant).

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## **Composition**

	Units (#) 2019	Units (%) 2019	Unit (#) 2022	Units (%) 2022	Units (%) UK Avg. Oct 2021
Convenience	6	18.8%	6	20.7%	9.2%
Comparison	2	6.3%	1	3.4%	27.1%
Retail Services	6	18.8%	6	20.7%	15.6%
Leisure Services	5	15.6%	6	20.7%	24.6%
Financial and Business Services	2	6.3%	2	6.9%	9.1%
Vacant	11	34.4%	8	27.6%	14.2%
<b>TOTAL</b>	<b>32</b>	<b>100.0%</b>	<b>29</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Experian Goad, Nexus Planning health checks 2019 and 2022

## **Retailer Representation**

- 4.132 Our composition survey finds that there are 29 units in the centre, a reduction of three units since the previous health checks were undertaken. Two units have been converted to residential use.
- 4.133 There have been no other notable changes in Newtownhamilton and the centre remains well provided for in terms of small convenience units and significantly exceeds the UK national average (20.7% compared to 9.2%). The offer includes two butchers, an off licence and Spar, as well as an eastern European supermarket and a general convenience store.
- 4.134 A pharmacy is now the only comparison goods store in the centre.
- 4.135 There is a slightly lower proportion of leisure services (20.7% compared to 24.6%), and a higher proportion of retail services (20.7% compared to 15.6%).

## **Vacancies**

- 4.136 The level of vacant units in the centre (27.6%) significantly exceeds the UK national of average (14.2%). Although this is an improvement on the previous study, there are a number of vacancies concentrated on The Square / and Dundalk Street which remains an area of concern.
-

### **Physical Structure and Environmental Quality**

4.137 No significant change was noted between health checks undertaken.

4.138 Newtownhamilton is a car-dominated environment, both in terms of the amount of traffic that travels through the centre and the amount of on-street parking. This, combined with the poor quality and narrow paving, makes it difficult for pedestrians to navigate the centre easily.

4.139 Whilst there are several attractive shopfronts in the centre, for example Ulster Bank and Mr Buzby's, the majority of units would benefit from improvements to make the centre feel more welcoming.

### **Summary**

4.140 Newtownhamilton is underperforming in its role as a Tier 3: Villages, with a high proportion of vacant units and offering little by way of comparison goods. We suggest that the centre is more akin to being a Tier 5 centre (please see also Section 5).

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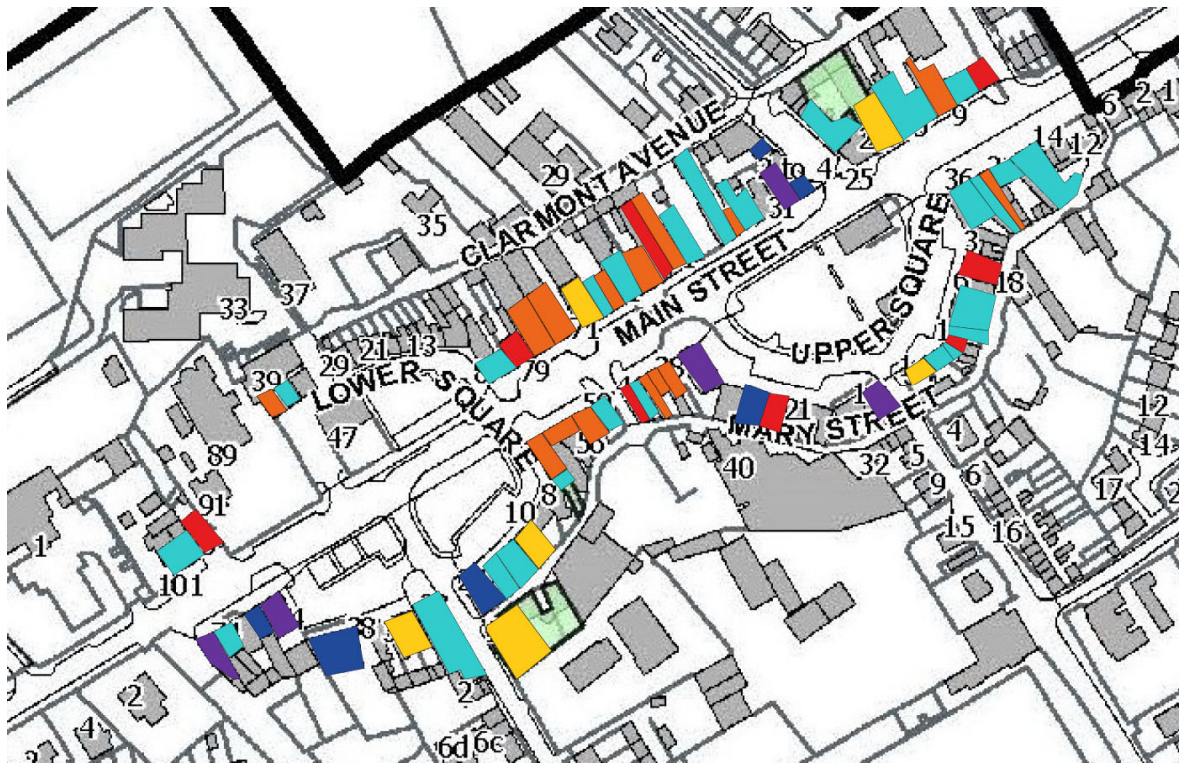
# Castlewellan

## Description & Status

- 4.141 Castlewellan Village Centre is located 11 miles southwest of Downpatrick and next to Castlewellan Lake and Slievenaslat Mountain.
- 4.142 The centre is based on a linear formation along Main Street and is unique due to its tree-lined squares both in the old town (upper square) and new town (lower square) as well as its very wide main street. The retail core of Castlewellan is within a Conservation Area, designated in December 1992.
- 4.143 Castlewellan is designated as Tier 2: Local & Small Towns within the proposed Settlement Hierarchy (Newry, Mourne and Down Local Development Plan Preferred Options Paper 2030).

## Experian Goad Land-use Plan

- 4.144 Please refer to **Appendix B** for a fully readable version of this plan.



Key = Yellow (convenience), Orange (comparison), Red (retail services), Light blue (leisure services), Purple (financial and business services), Dark blue (vacant).

## **Composition**

	Units (#) 2019	Units (%) 2019	Unit (#) 2022	Units (%) 2022	Units (%) UK Avg. Oct 2021
Convenience	7	11.1%	6	9.0%	9.2%
Comparison	15	23.8%	16	23.9%	27.1%
Retail Services	10	15.9%	8	11.9%	15.6%
Leisure Services	24	38.1%	26	38.8%	24.6%
Financial and Business Services	2	3.2%	5	7.5%	9.1%
Vacant	5	7.9%	6	9.0%	14.2%
<b>TOTAL</b>	<b>63</b>	<b>100.0%</b>	<b>67</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Experian Goad, Nexus Planning health checks 2019 and 2022

## **Retailer Representation**

- 4.145 Our composition survey finds that there are 67 units in the centre, an increase of four units since the previous health checks were undertaken. Figures for all uses remain broadly similar to the previous study.
- 4.146 Convenience units are in line with the UK national average at 9.0% compared to 9.2%. This figure excludes the Fresh Food Store, which is located out of the centre on Dublin Road.
- 4.147 The amount of comparison units is slightly lower than the average (23.9% compared to 27.1%). Whilst there is the lack of clothing provision within the Castlewellan, which would be expected in a centre of its size, there are a number of gift shops and specialist stores (Castle Brides and Mourne Tiles) which add to the uniqueness of the centre.
- 4.148 There is a significantly higher proportion of leisure services (38.8% compared to 24.6%) suggesting that Castlewellan is a popular destination with local residents and those from surrounding centre. A lower proportion of retail services (11.9% compared to 15.6%) and financial and business services are found in the centre (7.5% compared to 9.1%).
-

## **Vacancies**

- 4.149 The level of vacant units in the centre (9.0%) is lower than the UK national average (14.2%), reinforcing the health of this centre. The vacancies are spread throughout Castlewellan, showing no particular areas of concern.

## **Physical Structure and Environmental Quality**

- 4.150 Castlewellan remains an attractive village centre containing a variety of buildings of historic and architectural significance. Main Street is a wide avenue lined with mature trees and two town squares.
- 4.151 The shopfronts in the centre are largely of good quality, good examples include John Shilliday, Nana's Kitchen and Maginns Public House. A large empty plot adjacent to Oak Grill does, continues to detract from the attractiveness of this part of the centre.

## **Conclusions**

- 4.152 Castlewellan is an attractive centre and continues to perform well, as the maintained low vacancy rate would indicate.
-

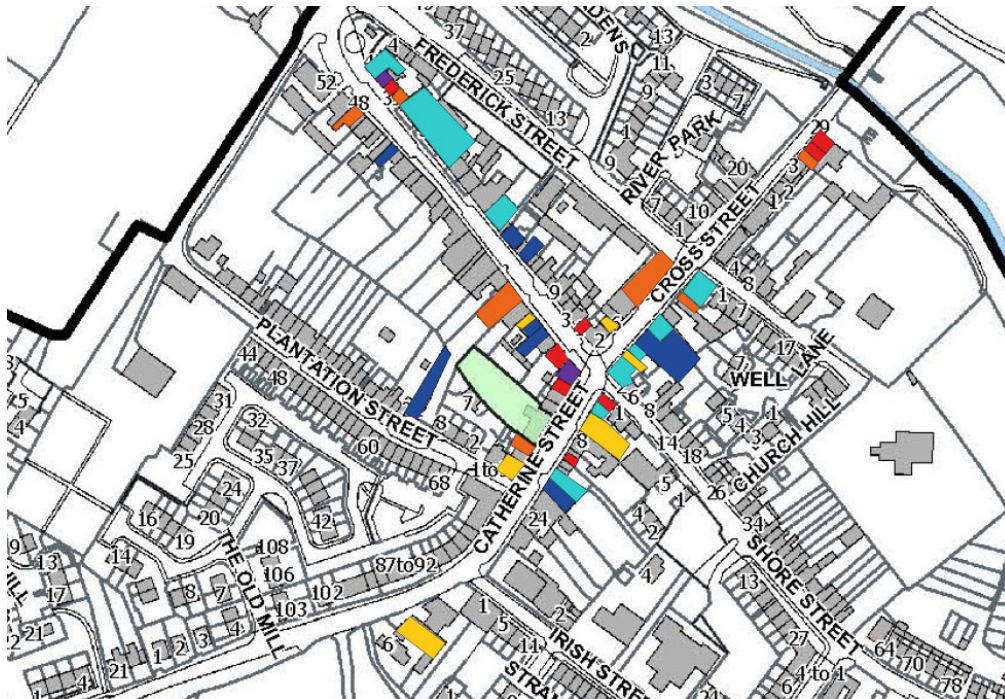
# Killyleagh

## Description & Status

- 4.154 Killyleagh Village Centre is located approximately 6 miles to the north east of Downpatrick and can be accessed via the A22 which runs through the centre. The centre is based on a crossroads with the retail core running along High Street, Cross Street and Downpatrick Road.
- 4.155 Killyleagh Castle is a dominant feature of the centre and overlooks the town towards the harbour on Strangford Lough.
- 4.156 A Conservation Area was designated in 1993, covering the retail core for Killyleagh and beyond.
- 4.157 Killyleagh is designated as a Tier 2: Local & Small Towns within the proposed Settlement Hierarchy (Newry, Mourne and Down Local Development Plan Preferred Options Paper 2030).

## Experian Goad Land-use Plan

- 4.158 Please refer to **Appendix B** for a fully readable version of this plan.



Key = Yellow (convenience), Orange (comparison), Red (retail services), Light blue (leisure services), Purple (financial and business services), Dark blue (vacant).

## **Composition**

	Units (#) 2019	Units (%) 2019	Units (#) 2022	Units (%) 2022	Units (%) UK Avg. Oct 2021
Convenience	6	13.6%	6	14.6%	9.2%
Comparison	9	20.5%	7	17.1%	27.1%
Retail Services	8	18.2%	8	19.5%	15.6%
Leisure Services	12	27.3%	10	24.4%	24.6%
Financial and Business Services	1	2.3%	2	4.9%	9.1%
Vacant	8	18.2%	8	19.5%	14.2%
<b>TOTAL</b>	<b>44</b>	<b>100.0%</b>	<b>41</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Experian Goad, Nexus Planning health checks 2019 and 2022

### **Retailer Representation**

- 4.159 Our composition survey finds that there are 41 units in the centre, a reduction of three units since the previous health checks were undertaken. Several former units on High Street have been converted to residential use.
- 4.160 There have been no changes with regards to convenience shopping, which remains above the UK national average (14.6% compared to 9.2%) and includes a butchers, greengrocer, newsagent, off licence and two Spar units. The centre performs well in terms of the convenience provision for a centre of its size.
- 4.161 The number of units in comparison use is significantly lower than the UK national average by 10 percentage points (17.1% compared to the UK national average of 27.1%) and has reduced by two units since the previous study.
- 4.162 Although the proportion of leisure services has decreased by 2.9 percentage points (24.4% compared to 27.3%), this is in line with the UK national average of 24.6% and comprises several public houses, cafes and overnight accommodation. The centre appears to perform well in this regard due the tourist appeal of the centre due to the coastal location of the town.
-

4.163 Retail service provision remains the same as the previous study and the addition of an estate agent has increased the units in financial and business use from 2.3% to 4.9%, which remains lower than the UK nation average of 9.1%.

### **Vacancies**

4.164 Whilst the number of vacancies remain the same as the previous study (eight), there have been several changes regarding vacant units. Three former units have since been converted to residential use whilst a further three units have become vacant, including a large furniture store to the edge of the centre.

4.165 The level of vacant units in the centre (19.5%) is higher than the UK average (14.2%). There is a small cluster of vacant units at the bottom end of High Street with the remaining vacancies spread throughout the centre

### **Physical Structure and Environmental Quality**

4.167 Killyleagh is an attractive centre with many buildings with architectural character and brightly painted facades. The centre also contains many Listed Buildings, a cluster of which are located on Downpatrick Road, at the corner with the High Street.

### **Summary**

4.168 Killyleagh is an attractive centre containing many Listed Buildings, as well as Killyleagh Castle, which is a dominate feature of the centre.

4.169 Killyleagh fulfils the role of a Village Centre serving the local population well in regards to convenience goods, retail and leisure services. There is, however, an under-provision of comparison goods and the number of vacant units remains high.

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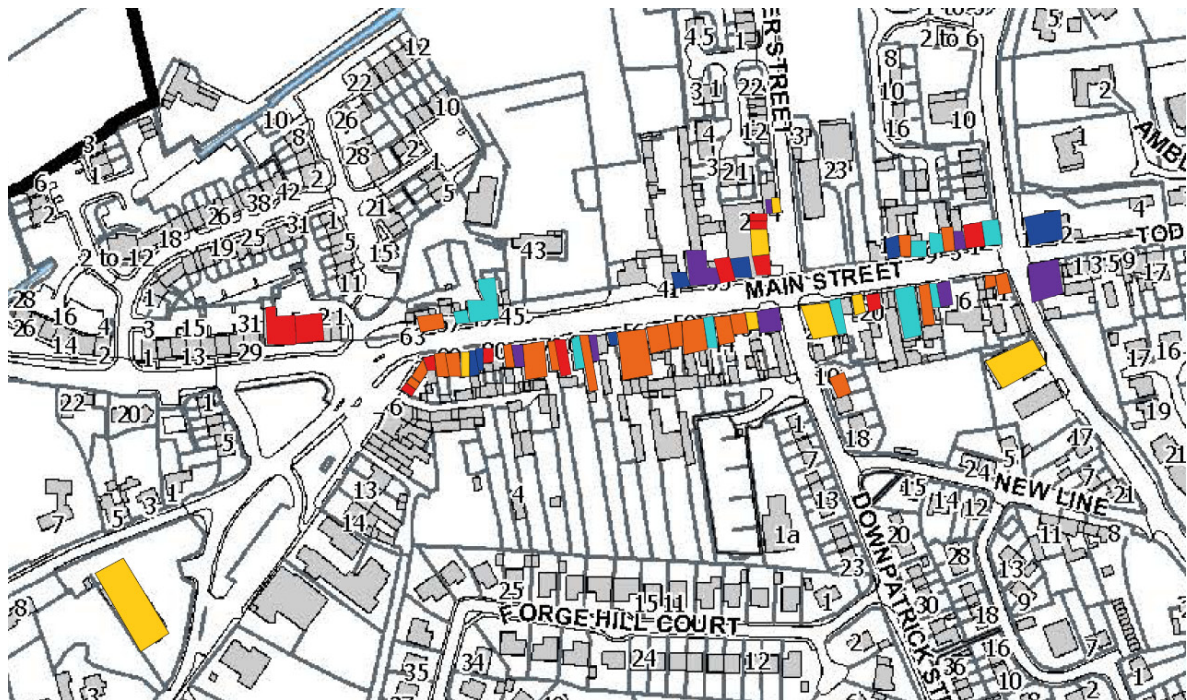
# Saintfield

## Description & Status

- 4.170 Saintfield Village Centre is located midway between Belfast (approximately 11 miles) and Downpatrick.
- 4.171 Saintfield is a traditional centre with a linear high street (Main Street), joining to the A7 at the crossroads with Belfast Road, Crossgar Road and Todd's Hill to the east of the centre.
- 4.172 The village centre is included in a Conservation Area and contains many Listed Buildings.
- 4.173 Saintfield is designated as a Tier 2: Local & Small Towns within the proposed Settlement Hierarchy (Newry, Mourne and Down Local Development Plan Preferred Options Paper 2030).

## Experian Goad Land-use Plan

- 4.174 Please refer to **Appendix B** for a fully readable version of this plan.



Key = Yellow (convenience), Orange (comparison), Red (retail services), Light blue (leisure services), Purple (financial and business services), Dark blue (vacant).

## **Composition**

	Units (#) 2019	Units (%) 2019	Units (#) 2022	Units (%) 2022	Units (%) UK Avg. Oct 2021
Convenience	9	13.8%	8	11.9%	9.2%
Comparison	20	30.8%	21	31.3%	27.1%
Retail Services	10	15.4%	10	14.9%	15.6%
Leisure Services	8	12.3%	12	17.9%	24.6%
Financial and Business Services	8	12.3%	9	13.4%	9.1%
Vacant	10	15.4%	7	10.4%	14.2%
<b>TOTAL</b>	<b>65</b>	<b>100.0%</b>	<b>67</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Experian Goad, Nexus Planning health checks 2019 and 2022

## **Retailer Representation**

- 4.175 Our composition survey finds that there are 67 units in the centre.
- 4.176 Despite the loss of a bakery, convenience shopping remains above the UK national average (11.9% compared to 9.2%) with butchers, a farm food shop and supermarkets in the centre.
- 4.177 Comparison unit provision exceeds the UK national average by 4.2% and remains broadly similar with findings of the previous health check (30.8%). For a centre of its size and the large amount of independent traders, we consider Saintfield to be performing well in this regard.
- 4.178 Since the previous health check, the proportion of leisure services has increased by 5.3 percentage points (12.3% compared to 19.3%) although this remains lower than the UK national average of 24.6%.
- 4.179 Retail services and Financial and Business services both remain broadly similar to the previous Study.

## **Vacancies**

- 4.180 The level of vacant units in the centre (10.4%) is lower than the UK average (14.2%). Since the previous health-check was undertaken in 2019 there has been a reduction in vacant units (by 5 percentage points), including two which are now in leisure use (Maud's and Edit 8). The vacant units remain spread throughout the centre and as such, there are no areas of particular concern.
-

### **Physical Structure and Environmental Quality**

4.181 No significant change was noted between health checks undertaken.

4.182 The Main Street benefits from architectural character and contains many Listed Buildings. The quality of shopfronts varies throughout the centre, good examples includes Windmill Fabrics (new since the previous visit), White Horse Inn and Masseys of Saintfield. It remains our opinion that the centre would benefit from a co-ordinated shopfront improvement scheme throughout.

### **Summary**

4.183 Saintfield is an attractive village that performs well in its role and function.

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## Bessbrook

### Description & Status

4.184 Bessbrook is located 3.5 miles north west of Newry and 39 miles from Belfast.

4.185 Bessbrook was founded in 1845 as a 'model village' whose streets and squares comprise of granite houses arranged in terraces round two squares linked by a broad road.

4.186 The Village Centre was designated as a Conservation Area in 1983 and includes the main shopping area within Bessbrook.

4.187 Bessbrook is designated at Tier 2: Local & Small Towns within the proposed Settlement Hierarchy (Newry, Mourne and Down Local Development Plan Preferred Options Paper 2030).

### Experian Goad Land-use Plan

4.188 Please refer to **Appendix B** for a fully readable version of this plan.



Key = Yellow (convenience), Orange (comparison), Red (retail services), Light blue (leisure services), Purple (financial and business services), Dark blue (vacant).

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## **Composition**

	Units (#) 2019	Units (%) 2019	Units (#) 2022	Units (%) 2022	Units (%) UK Avg. Oct 2021
Convenience	4	23.5%	5	29.4%	9.2%
Comparison	5	29.4%	4	23.5%	27.1%
Retail Services	4	23.5%	4	23.5%	15.6%
Leisure Services	1	5.9%	1	5.9%	24.6%
Financial and Business Services	1	5.9%	1	5.9%	9.1%
Vacant	2	11.8%	2	11.8%	14.2%
<b>TOTAL</b>	<b>17</b>	<b>100.0%</b>	<b>17</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Experian Goad, Nexus Planning health checks 2019 and 2022

### **Retailer Representation**

4.189 Our composition survey found that there remains 17 units in the centre.

4.190 Convenience shopping in Bessbrook is significantly higher than the UK national average (29.4% compared to 9.2%) with two butchers, a grocer, newsagent and a Vivo supermarket available in the centre.

4.191 Comparison units are below the UK national average at 23.5% compared to 27.1%, although this would be expected in a centre of this size.

4.192 Retail, leisure and financial and business services remain unchanged since the previous health checks were undertaken. A higher proportion of retail services (23.5% compared to 15.6%), in contrast the amount leisure services available is significantly under the average (5.9% compared to 24.6%, less than a quarter of the UK national average) with no public houses, takeaway units or restaurants available within Bessbrook.

### **Vacancies**

- 4.193 The level of vacant units in the centre (11.8%) is under the UK average (14.2%) indicating that the centre is performing well in this regard.

### **Physical Structure and Environmental Quality**

- 4.194 No significant change was noted between the health checks undertaken.
- 4.195 Bessbrook offers a pleasant and welcoming environment with Charlemont Square providing an expanse of green space and tree planting in the centre of the village, the area appeared to be well maintained at the time of the visit. Shop frontages are attractive and add character to Bessbrook.
- 4.196 No litter or graffiti was witnessed at the time of the visit, however, improved paving along Fountain Street and outside the small parade of shops on Charlemont Square East would further enhance the centre.

### **Summary**

- 4.197 Bessbrook offers a pleasant and welcoming environment that appears to be well maintained. Shop frontages are attractive and add character to Bessbrook.
- 4.198 The composition of the centre suggests that the village is performing well in serving the needs of the local population.
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## 5.0 Town Centres Policy

### The Retail Hierarchy

- 5.1 In Section 4 of the original Study we set out health-checks of the twelve centres identified within legacy local development plans for Newry, Mourne and Down District. This work is updated in Section 4 of this Study. Our work involved analysing the health of each centre under a series of checks specified by SPPS, as well as understanding market shares and qualitative likes and dislikes deriving from the widespread household telephone survey. Under the original Study, we also sought to corroborate our results through a series of workshops with Officers and stakeholders in each of the main centres.
- 5.2 The culmination of this work allowed us to recommend an appropriate hierarchy of centres for the District under the original Study. Please see Section 5 of that Study for a full assessment of the policy basis and other considerations for applying the suggested hierarchy.
- 5.3 We concluded that the hierarchy set out at Figure 5.1 might be appropriate:

**Figure 5.1 | Nexus 2020 Study - Recommended Retail Hierarchy**

Tier	Definition	Settlement
<b>1 – City Centres</b>	Provides (or has the potential to provide) a range of shops, services, businesses and community facilities to a significant hinterland which includes smaller neighbouring towns or a number of suburbs.	Newry
<b>2 – Town Centres</b>	Provides (or has the potential to provide) a range of shops, services, businesses and community facilities to a hinterland which includes neighbouring villages or a few surrounding suburbs	Downpatrick Newcastle Ballynahinch Kilkeel
<b>3 – District /Small Town Centre</b>	Provides (or has the potential to provide) a range of shops, services, businesses and community facilities to a surrounding suburban community.	Warrenpoint Saintfield Castlewellan Crossmaglen

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		Killyleagh
<b>4 – Local/Rural Centres</b>	Provides (or has the potential to provide) a range of shops and services to a surrounding community.	Newtownhamilton Bessbrook

- 5.4 In the intervening period, the Council has prepared an updated retail hierarchy for the District. This distinguishes between Local Centres (Tier 4) and Village Centres (Tier 5). Tier 4 is proposed to include suburban Local Centres, namely Ballymote (Downpatrick) and Fiveways (Newry).
- 5.5 In our original Study, we recommended that the Council might wish to undertake a 'Small Settlements Assessment' as part of future work stages. This was in recognition that a number of smaller centres were attracting retail custom based on our household surveys, and that there may therefore be grounds for including some of these centres within the retail hierarchy.
- 5.6 The Council has now produced such a series of assessments, titled 'Village Assessments'. These assessments build on the original Nexus work and seek to establish which destinations outside of the 12 centres considered under our original Study, might form part of Tier 5. It is also the basis for understanding whether any centres which currently sit outside the proposed hierarchy should actually be included within Tier 3 ('District/Small Town Centres'). We have therefore been asked to comment on the findings of the report and we do so as follows.
- 5.7 In total, 22 village assessments have been produced by the Council. Each is considered in terms of its ranges of uses/services, vacancy rate, parking provision, access to public transport and footfall, before culminating in a recommendation as to whether the centre should be brought forward for inclusion within the retail hierarchy or not.
- 5.8 The Council's assessment concludes that the following 10 centres should be brought forward for inclusion. In each case we have extrapolated brief details of their retail and community facility components, which we consider to be key aspects when considering their inclusion within the hierarchy:
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**Figure 5.2 | Council Village Assessment – Extrapolated Findings**

Location	No. of Units	Community Facilities
<b>Ardglass</b>	27 (including 7 vacant)	Play Park, Primary School and 2 x Churches
<b>Clough</b>	16 (including 5 vacant)	Church
<b>Crossgar</b>	50 (including 3 vacant)	2 x Churches
<b>Dundrum</b>	26 (including 5 vacant)	Education Centre, Church
<b>Strangford</b>	15 (no vacant)	
<b>Annalong</b>	11 (including 2 vacant)	Doctors Surgery, Community Centre, Primary School and 3 x churches.
<b>Camlough</b>	36 (including 2 vacant)	Primary School, Church
<b>Hilltown</b>	25 (including 3 vacant)	Youth Centre, Church
<b>Mayobridge</b>	10 (including 1 vacant)	Community Centre, Primary School, Church
<b>Rostrevor</b>	27 (including 2 vacant)	Youth Club, Health Centre, 2 x Primary School, 3 x Churches

Source: Council

- 5.9 In our original Study, we set out a range of ‘retail hierarchy indicators’ in order to settle on a suggested hierarchy for the 12 centres that were subject to that Study (Figure 5.2 of that Study). Applying those indicators to Figure 5.2 of this Study, it is clear that **Crossgar** deserves consideration as being a Tier 3 centre, based on its combination of retail and community facilities. Crossgar is comparable in role and function to some of the centres at that tier, such as Crossmaglen and Killyleagh.
- 5.10 Incorporating the additional Tier 5 suggested by the Council, our updated recommendation in respect of a retail hierarchy is as follows:

**Figure 5.3 | Nexus 2022 Study - Recommended Retail Hierarchy**

<b>Tier</b>	<b>Definition</b>	<b>Settlement</b>
<b>1 – City Centres</b>	Provides (or has the potential to provide) a range of shops, services, businesses and community facilities to a significant hinterland which includes smaller neighbouring towns or a number of suburbs.	Newry
<b>2 – Town Centres</b>	Provides (or has the potential to provide) a range of shops, services, businesses and community facilities to a hinterland which includes neighbouring villages or a few surrounding suburbs	Downpatrick Newcastle Ballynahinch Kilkeel
<b>3 – District /Small Town Centre</b>	Provides (or has the potential to provide) a range of shops, services, businesses and community facilities to a surrounding suburban community.	Warrenpoint Saintfield Castlewellan Crossmaglen Killyleagh Crossgar
<b>4 – Local Centres</b>	Provides (or has the potential to provide) a limited range of shops, services, businesses and community facilities to serve the immediate local area.	Fiveways (Newry) Ballymote (Downpatrick)
<b>5 – Village Centres</b>	Provides (or has the potential to provide) a range of shops and services to a surrounding community.	Newtownhamilton Bessbrook Ardglass Rostrevor Clough Dundrum Stranford Annalong Calough Hilltown Mayobridge

- 5.11 For the purposes of policy, we recommend that all other rural centres within the District are undefined and classified as settlements in the countryside.

## **Town Centre Boundaries**

- 5.12 In terms of whether to define settlement boundaries or not, the context for defining the spatial extent of centres is set out at Paragraphs 6.280-6.283 of the SPPS. Centre boundaries enable developers and decision makers to consider the sequential, impact and needs tests when considering individual proposals for development and/or change of use. It is also relevant for consideration of the impact thresholds (nationally set at 1,000 sq m gross external area under the SPPS).
- 5.13 The range of potential delineations include:
- Primary Retail Core;
  - Town Centre;
  - Edge-of-centre; and
  - Out-of-centre.
- 5.14 Edge-of-centre is defined as sites that are within a 300m walking distance of the centre boundary, whilst out-of-centre is defined as those areas beyond that 300m. Defining suitable centre boundaries is therefore important, and in this context and we would therefore advocate the inclusion of centre boundaries for each of the towns defined in Tiers 1-5.
- 5.15 Linked to this, we recommend that the draft policy seeks to enshrine a 'town centre first' approach by including the criteria set out in Section 5 of our original Study.

## **Development Management Policies - Update**

- 5.16 Our original Study set out a number of suggested themes for development management policies (5.35 – 5.57 of that Study). The two reports should be read alongside, and we do not repeat our original assessment here.
- 5.17 However, we do suggest below some updates to account for the passing of time, and the findings of our work in this Supplementary Report.
- Our trends assessment in Section 2 highlights that it has become increasingly paramount to allow for suitable flexibility of use within our town centres. With the pandemic having further
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accelerated the shift to online shopping, it becomes increasingly vital that retail and leisure services, as well as residential and other commercial/employment uses, underpin town centres in order to maintain their vitality and viability.

- Linked to this, our updated capacity assessment in Section 3 has highlighted that whilst there is some capacity for additional convenience and comparison goods floorspace in the District, and that there is therefore likely to be some market demand for new floorspace, those capacities are not extensive, and so vacant units are unlikely to be filled rapidly in every case.
- Our health-check work in Section 4 highlights that, in common with many other parts of the UK, smaller towns and villages in the District have actually benefitted from people working closer to home over the pandemic. Levels of vacancies have been stable and, in the majority of cases, have actually decreased. This is true of nine of the 12 centres we have surveyed; Newcastle, Ballynahinch, Warrenpoint, Crossmaglen, Kilkeel, Newtownhamilton, Saintfield and Bessbrook.
- However, it is notable that larger centres, and in particular Newry, which is more susceptible to the loss of national multiple chain stores, have not fared so well. It is telling that whilst vacancies in Newry have only increased by 5 units over the period 2019-2022, the total number of commercial units in the centre has decreased rapidly over that period from 467 units to 433 units, a loss of 34 units (over 7% of all units surveyed in 2019). Whilst some of those units have been due to commercial unit amalgamations, the vast majority are units that have been given over to alternative uses, particularly residential uses.
- Tying these themes together, we consider this provides further evidence in support of one of the key conclusions of our original Study, which explained at 5.23 that:

*"We consider that the future of the High Street is likely to evolve quickly, and that there is some danger in being closed to the idea of non-retail uses at ground floor level within the heart of major town centres. Any application for a change of use would need to be considered through a planning application in any event (where Permitted Development Rights do not apply), and so there is a significant degree of control even where there is no defined PRC. To our mind, it is unnecessary to unduly constrain the availability of potentially beneficial and footfall generating sites by defining a PRC too widely, if one is required at all".*

- Those comments were made in the context of considering the appropriateness of employing
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Primary Retail Core (PRC) designations, and we recommended that a PRC was only pursued for Newry, and that there should be no Primary or Secondary Frontages designated in any centre. We consider that the evidence of this Supplementary Study solidifies that view.

- Taking a step further, the Council may also wish to consider specific LDP support for the High Street. The Council will no doubt take a keen interest in the findings of the Executive's High Street Task Force report 'Delivering a 21st Century High Street' (March 2022). That report sets out 14 recommendations for the future of Northern Ireland's High Streets. Of particular pertinence to Newry, Mourne and Down, we would recommend that the Council considers the potential to secure funding from some of the many initiatives recommended under that Report, should they be accepted by the Executive. Ideas such as the 'Living High Streets Fund' and 'High Streets Investment Programme' offer the potential to help regenerate certain areas (e.g. the parts of Kilkeel identified in our original Study). It could also become a champion for 'Smart High Streets', perhaps identifying its larger centres of Newry and Downpatrick as good examples of where increasingly internet-savvy shoppers may be able to access digital technologies 'in store' (i.e. by visiting bricks and mortar stores to try out products at omni-channel retailers, thereby increasing footfall generally).
- Notably, Recommendation 11 of the High Street Task Force report deals with a 'review of planning processes'. Specifically, it is suggested that Councils should enable minor development to be implemented without delay or undue cost. This is suggested as being linked to permitted development rights and the Use Classes Order. We agree, and this links in with our previous comments on not overly restricting town centres through the imposition of Primary Retail Core or other boundaries that result in unnecessary use class restrictions.

## Concluding Comments

- 5.18 This Supplementary Study has been produced in order to assist the Council in preparing for its Plan Examination by considering updated economic forecasting and health-check assessment. It also extends consideration of the relevant factors to a new end date for the Plan of 2035.
- 5.19 The Supplementary Study should be read alongside the original Study from 2020. This Study has updated the findings of the original study in terms of floorspace capacities, has contrast the health of key centres over the period 2019-2022, and has reviewed policy recommendations in terms of the retail hierarchy and other development management themes that have arisen over the period of the
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Covid pandemic.

**Appendix A:**

**Statistical Tables**

Table 1: Population and convenience goods expenditure per capita

Zone						Per capita expenditure (£)					
	2020	2022	2025	2030	2035	2020 <i>inc SFT</i>	2020 <i>exc SFT</i>	2022	2025	2030	2035
1	23,879	24,160	24,507	24,962	25,318	2,606	2,465	2,319	2,307	2,303	2,314
2	54,922	55,567	56,365	57,413	58,231	2,595	2,455	2,309	2,297	2,293	2,304
3	41,708	42,197	42,803	43,599	44,221	2,650	2,507	2,358	2,347	2,342	2,354
4	21,126	21,374	21,681	22,084	22,398	2,745	2,596	2,442	2,430	2,425	2,437
5	36,202	36,627	37,153	37,844	38,383	2,781	2,631	2,474	2,462	2,457	2,469
6	19,153	19,378	19,656	20,021	20,307	2,822	2,669	2,511	2,498	2,493	2,506
Total	196,990	199,301	202,165	205,923	208,859						

Notes:

- a. Zones based on the post code sectors shown on the plan at Appendix A
- b. Per capita expenditure derived from Experian MMG3 data (2022 report)
- c. Base population derived from Experian MMG3 data (2022 report). Projections to 2035 utilise NISRA forecast data for NMD.
- d. Per capita expenditure projected forward using forecast growth rates taken from Table 6 of Experian Retail Planner Briefing Note 19 (January 2022)
- e. Expenditure excludes Special Forms of Trading in line with 'adjusted' allowance derived from Figure 5 of Appendix 3 to Experian Retail Planner Briefing Note 19 (January 2022)

2020 Prices

Table 2a: Total convenience goods expenditure available

Zone	Expenditure (£m)				Growth (£m)	
	Convenience				Convenience	
	2022	2025	2030	2035	2022-2025	2020-2030
1	56.0	56.5	57.5	58.6	0.5	2.6
2	128.3	129.5	131.6	134.2	1.2	5.9
3	99.5	100.4	102.1	104.1	0.9	4.6
4	52.2	52.7	53.6	54.6	0.5	2.4
5	90.6	91.5	93.0	94.8	0.8	4.2
6	48.7	49.1	49.9	50.9	0.5	2.2
Total	475.3	479.7	487.7	497.1	4.4	21.8

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

Zone	Expenditure (£m)	
	Convenience (2020)	
	Main	Top-up
1	42.8	13.2
2	101.9	26.4
3	78.8	20.7
4	40.2	12.0
5	70.8	19.9
6	37.5	11.1
Total	372.0	103.3

Notes:

- a. Figures derived from multiplying per capita expenditure with population within each zone using data provided at Table 1
- b. Ratio of main food shopping to top-up food shopping per zone derived directly from Questlons 8 and 14 of the NEMS Household Survey (November 2019)

2020 Prices

Table 3: Convenience goods shopping patterns

	Total Main Food (%)	Total Top-up (%)	Total Combined (%)	Zone 1 Main Food (%)	Zone 1 Top-up (%)	Zone 2 Main Food (%)	Zone 2 Top-up (%)	Zone 3 Main Food (%)	Zone 3 Top-up (%)	Zone 4 Main Food (%)	Zone 4 Top-up (%)	Zone 5 Main Food (%)	Zone 5 Top-up (%)	Zone 6 Main Food (%)	Zone 6 Top-up (%)
Zone 1 NI															
Eurospar, Newry Road, Crossmaglen	0.4%	2.3%	0.9%	3.8%	9.7%	0.0%	0.0%	0.0%	2.6%	0.0%	2.1%	0.0%	0.0%	0.0%	3.4%
Local shops, Crossmaglen Village Centre	0.2%	0.6%	0.3%	2.3%	4.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops, Newtownhamilton Town Centre	0.0%	0.4%	0.1%	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops, Whitecross Village Centre	0.0%	0.4%	0.1%	0.0%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Dundalk Street, Newtownhamilton, Newry	0.1%	0.0%	0.1%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nisa, Carrickasticken Road, Forkhill, Newry	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Others Zone 1	0.5%	1.3%	0.8%	3.0%	11.2%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Concession Road, Cullaville, Newry	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Vivo (Murphy's), Silverbridge Road, Silverbridge, Newry	0.0%	1.2%	0.2%	0.0%	2.2%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 1 sub-total	1.5%	6.1%	2.6%	9.6%	34.2%	0.8%	3.4%	0.6%	2.6%	0.8%	2.1%	0.0%	0.0%	0.0%	3.4%
Zone 2 NI															
Dunnes Stores, Old Creamery Shopping Centre, Newry	3.8%	1.7%	3.2%	3.7%	0.0%	11.9%	6.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Fiveways Shop and Service Station, Armagh Road, Newry	3.3%	3.1%	3.1%	0.8%	2.6%	10.8%	10.1%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Monaghan Street, Newry	0.6%	0.2%	0.5%	3.1%	0.0%	0.8%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Castle Street, Newry	5.3%	1.5%	4.3%	2.8%	0.6%	10.8%	4.2%	8.8%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops, Camlough Village Centre	0.2%	0.9%	0.4%	2.2%	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops, Jonesborough Village Centre	0.0%	0.8%	0.2%	0.0%	0.0%	0.0%	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops, Mayobridge Village Centre	0.0%	0.3%	0.1%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marks & Spencer, The Quays Shopping Centre, Newry	0.6%	0.6%	0.6%	0.0%	0.0%	1.6%	1.2%	0.6%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nisa, Main Street, Camlough, Newry	0.8%	2.5%	1.2%	0.8%	8.2%	2.6%	5.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
O'Hare's Supermarket, Newry Road, Mayobridge, Newry	0.0%	0.9%	0.2%	0.0%	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others Zone 2	2.6%	6.9%	3.4%	3.3%	9.5%	5.9%	13.4%	2.6%	8.6%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%
Sainsbury's, The Quays, Newry	2.5%	3.2%	2.7%	7.4%	0.0%	1.5%	8.1%	5.7%	2.8%	0.0%	0.0%	0.0%	0.0%	1.6%	3.4%
Spar, Buttercrane Shopping Centre, Newry	0.3%	1.2%	0.5%	0.6%	2.4%	0.8%	2.8%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%
Supervalu, Hill Street, Newry	1.5%	1.7%	1.5%	0.6%	0.0%	3.2%	4.0%	2.4%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Downshire Road, Carneyhough, Newry	13.8%	3.1%	11.2%	14.7%	6.6%	33.9%	8.2%	11.4%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%
The Good Food Shop, Hill Street, Newry	0.0%	0.7%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Village Shop, The Village, Jonesborough, Newry	0.8%	0.9%	0.7%	0.0%	0.0%	2.6%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 sub-total	36.6%	34.6%	35.0%	40.8%	32.5%	87.1%	90.2%	32.7%	22.2%	0.7%	0.0%	0.0%	1.0%	1.6%	3.4%
Zone 3 NI															
Asda, Newcastle Street, Kilkeel	8.7%	1.6%	7.2%	0.0%	0.0%	0.0%	0.0%	40.1%	7.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, (Grant's) Bog Road, Kilkeel	0.0%	1.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, The Square, Warrenpoint	1.9%	2.0%	1.8%	0.0%	0.0%	5.9%	2.4%	0.6%	4.8%	0.0%	0.6%	1.1%	0.0%	0.0%	0.0%
Local shops, Annalong Village Centre	0.0%	0.8%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops, Kilkeel Town Centre	0.0%	0.6%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops, Warrenpoint Town Centre	0.0%	0.9%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%
Milestone Service Station, Newry Street, Rathfriland	1.2%	1.3%	1.2%	0.0%	0.0%	0.0%	1.1%	3.9%	4.5%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Nisa Fresh Food Centre, Church Street, Warrenpoint	1.5%	0.5%	1.3%	0.0%	0.0%	0.0%	0.0%	4.4%	0.7%	5.2%	2.9%	0.0%	0.0%	0.0%	0.0%
Others Zone 3	0.1%	2.7%	0.6%	0.0%	0.0%	0.0%	0.0%	0.6%	11.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Greencastle Street, Kilkeel	0.9%	4.6%	1.6%	0.0%	0.0%	0.0%	0.0%	3.1%	18.0%	0.0%	0.0%	1.4%	2.1%	0.0%	0.0%
Vivo (Murdock's), Upper Dromore Road, Warrenpoint	0.0%	1.6%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	7.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 3 sub-total	14.4%	17.7%	14.6%	0.0%	0.0%	5.9%	3.5%	52.8%	66.9%	10.7%	2.9%	2.0%	4.0%	0.0%	0.0%
Zone 4 NI															
Centra, Railway Street, Newcastle	0.0%	0.7%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.4%	0.0%	0.0%	0.0%	0.0%
Fresh Food Centre, Dublin Road, Castlewellan	1.1%	3.6%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.0%	34.8%	0.0%	0.0%	0.0%	0.0%
Lidl, Railway Street, Newcastle	0.9%	1.6%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	6.9%	11.7%	0.6%	1.0%	0.0%	0.0%
Local shops, Castlewellan Town Centre	0.3%	0.5%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%	4.0%	0.0%	0.0%	0.0%	0.8%
Local shops, Newcastle Town Centre	0.0%	0.7%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	4.8%	0.0%	0.0%	0.0%	0.0%
Others Zone 4	0.3%	1.4%	0.6%	0.0%	0.0%	0.0%	0.0%	0.8%	0.7%	1.3%	12.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Castlewellan Road, Newcastle	7.6%	2.2%	6.4%	0.0%	0.0%	0.0%	0.0%	4.2%	2.6%	49.3%	13.8%	6.1%	1.0%	0.9%	0.0%
Zone 4 sub-total	10.1%	10.7%	10.3%	0.0%	0.0%	0.0%	0.0%	4.9%	5.2%	70.1%	87.5%	6.7%	2.0%	0.9%	0.8%
Zone 5 NI															
Asda, Ballydugan Retail Park, Downpatrick	14.0%	1.7%	11.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.8%	0.0%	60.8%	8.8%	13.4%	2.0%
Eurospar, Saintfield Road, Crossgar	0.1%	1.6%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	8.6%	0.0%	1.2%
Lidl, Market Street, Downpatrick	1.1%	0.9%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.7%	5.0%	0.0%	0.0%
Local shops, Ardglass Village Centre	0.1%	0.6%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	3.5%	0.0%	0.0%
Local shops, Crossgar Village Centre	0.0%	1.1%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.2%	0.0%	0.0%
Local shops, Downpatrick Town Centre	0.3%	1.8%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%	3.3%	0.0%	8.4%	0.0%	0.0%	0.0%
Local shops, Killeyneagh Village Centre	0.0%	0.5%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%	0.0%	0.0%
Local shops, Strangford Village Centre	0.0%	0.6%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%
Others Zone 5	0.3%	3.8%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	20.5%	0.0%	2.2%
Supervalu, Downpatrick Road, Downpatrick	0.3%	1.9%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	11.0%	0.0%	0.0%	0.0%
Supervalu, Killough Road, Downpatrick	0.1%	0.3%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	1.9%	0.0%	0.0%
Zone 5 sub-total	16.2%	14.8%	16.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.3%	3.3%	71.1%	80.4%	13.4%	5.3%
Zone 6 NI															
Carlisle's Fresh Foods, Belfast Road, Ballynahinch	0.2%	0.8%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	8.7%
Iceland, High Street, Ballynahinch	1.1%	0.9%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	10.2%	9.0%
Lidl, Harmony Way, Ballynahinch	2.4%	2.2%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	1.1%	23.8%	20.8%
Local shops, Ballynahinch Town Centre	0.4%	0.9%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.7%	9.9%
Local shops, Drumaness Village Centre	0.0%	0.5%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.4%
Local shops, Saintfield Village Centre	0.0%	0.5%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%
Morrisons Vivo Extra, Ballynahinch Road, Saintfield	0.8%	2.5%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%						

Total	£372.0	£103.3	£475.3	£42.8	£13.2	£101.9	£26.4	£78.8	£20.7	£40.2	£12.0	£70.8	£19.9	£37.5	£11.1
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Table 5: Convenience goods shopping patterns - District

	Gross Floorspace	Net Sales Area	Net Convenience Sales Area	Sales Density	Benchmark Turnover	Survey Turnover	Inflow	Estimated Total Turnover	Trade Against Benchmark
Destination			(A)	(B)	(AxB)		Allowance	With Inflow	
	(Sq m)	(Sq m)	(Sq m)	(£ per sq m)	(£m)	(£m)	(£m)	(£m)	(£m)
Zone 1 NI									
Eurospar, Newry Road, Crossmaglen					£4.1	£4.1	£0.0	£4.1	£0.0
Local shops, Crossmaglen Village Centre					£1.6	£1.6	£0.0	£1.6	£0.0
Local shops, Newtownhamilton Town Centre					£0.4	£0.4	£0.0	£0.4	£0.0
Local shops, Whitecross Village Centre					£0.4	£0.4	£0.0	£0.4	£0.0
Mace, Dundalk Street, Newtownhamilton, Newry					£0.2	£0.2	£0.0	£0.2	£0.0
Nisa, Carrickasticken Road, Forkhill, Newry					£0.3	£0.3	£0.0	£0.3	£0.0
Others Zone 1					£3.6	£3.6	£0.0	£3.6	£0.0
Spar, Concession Road, Cullaville, Newry					£0.5	£0.5	£0.0	£0.5	£0.0
Vivo (Murphy's), Silverbridge Road, Silverbridge, Newry					£1.2	£1.2	£0.0	£1.2	£0.0
Zone 1 sub-total					£12.4	£12.4	£0.0	£12.4	£0.0
Zone 2 NI									
Dunnes Stores, Old Creamery Shopping Centre, Newry					£15.3	£15.3	£0.8	£16.1	£0.8
Nisa Fiveways Shop and Service Station, Armagh Road, Newry					£14.8	£14.8	£0.0	£14.8	£0.0
Iceland, Monaghan Street, Newry	415	212	200	£7,568	£1.5	£2.4	£0.0	£2.4	£0.9
Lidl, Castle Street, Newry	929	743	584	£8,883	£5.2	£20.5	£0.0	£20.5	£15.3
Local shops, Camlough Village Centre					£1.8	£1.8	£0.0	£1.8	£0.0
Local shops, Jonesborough Village Centre					£0.8	£0.8	£0.0	£0.8	£0.0
Local shops, Mayobridge Village Centre					£0.3	£0.3	£0.0	£0.3	£0.0
Local shops, Newry City Centre					£5.7	£5.7	£0.0	£5.7	£0.0
Marks & Spencer, The Quays Shopping Centre, Newry	4897	929	842	£11,275	£9.5	£2.6	£0.13	£2.8	-£6.7
Nisa, Main Street, Camlough, Newry					£5.5	£5.5	£0.0	£5.5	£0.0
O'Hare's Supermarket, Newry Road, Mayobridge, Newry					£0.9	£0.9	£0.0	£0.9	£0.0
Others Zone 2					£16.0	£16.0	£0.0	£16.0	£0.0
Sainsbury's, The Quays, Newry	5388	3161	2049	£12,685	£26.0	£12.8	£0.6	£13.5	-£12.5
Spar, Buttercrane Shopping Centre, Newry					£2.3	£2.3	£0.0	£2.3	£0.0
Supervalu, Hill Street, Newry					£7.0	£7.0	£0.0	£7.0	£0.0
Tesco Extra, Downshire Road, Carneyhough, Newry	5853	3716	2507	£14,304	£35.9	£53.2	£2.7	£55.8	£20.0
The Good Food Shop, Hill Street, Newry					£0.6	£0.6	£0.0	£0.6	£0.0
The Village Shop, The Village, Jonesborough, Newry					£3.5	£3.5	£0.0	£3.5	£0.0
Zone 2 sub-total					£152.7	£166.2	£4.2	£170.4	£17.7
Zone 3 NI									
Asda, Newcastle Street, Kilkeel	3599	1435	869	£14,480	£12.6	£34.0	£1.0	£35.0	£22.4
Costcutter, (Grant's) Bog Road, Kilkeel					£0.9	£0.9	£0.0	£0.9	£0.0
Eurospar, The Square, Warrenpoint					£8.8	£8.8	£0.0	£8.8	£0.0
Local shops, Annalong Village Centre					£0.7	£0.7	£0.0	£0.7	£0.0
Local shops, Kilkeel Town Centre					£0.5	£0.5	£0.0	£0.5	£0.0
Local shops, Warrenpoint Town Centre					£0.8	£0.8	£0.0	£0.8	£0.0
Milestone Service Station, Newry Street, Rathfriland					£5.6	£5.6	£0.0	£5.6	£0.0
Nisa Fresh Food Centre, Church Street, Warrenpoint					£6.0	£6.0	£0.0	£6.0	£0.0
Others Zone 3					£2.8	£2.8	£0.0	£2.8	£0.0
Spar, Greencastle Street, Kilkeel					£7.6	£7.6	£0.0	£7.6	£0.0
Vivo (Murdock's), Upper Dromore Road, Warrenpoint					£1.4	£1.4	£0.0	£1.4	£0.0
Zone 3 sub-total					£47.9	£69.3	£1.0	£70.3	£22.4
Zone 4 NI									
Centra, Railway Street, Newcastle					£0.8	£0.8	£0.0	£0.8	£0.0
Fresh Food Centre, Dublin Road, Castlewellan					£8.2	£8.2	£0.0	£8.2	£0.0
Lidl, Railway Street, Newcastle	929	743	584	£8,883	£5.2	£5.0	£0.0	£5.0	-£0.2
Local shops, Castlewellan Town Centre					£1.6	£1.6	£0.0	£1.6	£0.0
Local shops, Newcastle Town Centre					£0.8	£0.8	£0.0	£0.8	£0.0
Others Zone 4					£2.7	£2.7	£0.0	£2.7	£0.0
Tesco Superstore, Castlewellan Road, Newcastle	2500	1138	768	£14,304	£11.0	£30.2	£0.0	£30.2	£19.2
Zone 4 sub-total					£30.2	£49.2	£0.0	£49.2	£19.0
Zone 5 NI									
Asda, Ballydugan Retail Park, Downpatrick	4534	2481	1501	£14,480	£21.7	£54.4	£0.0	£54.4	£32.6
Eurospar, Saintfield Road, Crossgar					£2.3	£2.3	£0.0	£2.3	£0.0
Lidl, Market Street, Downpatrick	929	743	595	£8,883	£5.3	£5.0	£0.0	£5.0	-£0.3
Local shops, Ardglass Village Centre					£1.1	£1.1	£0.0	£1.1	£0.0
Local shops, Crossgar Village Centre					£1.2	£1.2	£0.0	£1.2	£0.0
Local shops, Downpatrick Town Centre					£3.1	£3.1	£0.0	£3.1	£0.0
Local shops, Killyleagh Village Centre					£0.6	£0.6	£0.0	£0.6	£0.0
Local shops, Strangford Village Centre					£0.7	£0.7	£0.0	£0.7	£0.0
Others Zone 5					£5.2	£5.2	£0.0	£5.2	£0.0
Supervalu, Downpatrick Road, Downpatrick					£3.2	£3.2	£0.0	£3.2	£0.0
Supervalu, Killough Road, Downpatrick					£0.8	£0.8	£0.0	£0.8	£0.0
Zone 5 sub-total					£45.2	£77.6	£0.0	£77.6	£32.4
Zone 6 NI									
Carlisle's Fresh Foods, Belfast Road, Ballynahinch					£1.6	£1.6	£0.0	£1.6	£0.0
Iceland, High Street, Ballynahinch		424	401	£7,568	£3.0	£5.3	£0.0	£5.3	£2.3
Lidl, Harmony Way, Ballynahinch	929	743	595	£8,883	£5.3	£11.9	£0.0	£11.9	£6.6
Local shops, Ballynahinch Town Centre					£2.9	£2.9	£0.0	£2.9	£0.0
Local shops, Drummaness Village Centre					£0.6	£0.6	£0.0	£0.6	£0.0
Local shops, Saintfield Village Centre					£0.5	£0.5	£0.0	£0.5	£0.0
Morrisons Vivo Extra, Ballynahinch Road, Saintfield					£6.2	£6.2	£0.0	£6.2	£0.0
Others Zone 6					£0.6	£0.6	£0.0	£0.6	£0.0
Zone 6 sub-total					£20.7	£29.6	£0.0	£29.6	£8.9
District sub-total					£309.0	£404.2	£5.2	£409.5	£100.4

Notes:  
a. Gross floorspace derived from IGD/StorePoint database, Council records or Nexus Planning assessment  
b. Net floorspace derived from IGD/StorePoint database or Council records where available or based on Nexus Planning professional judgement  
c. Proportion of net floorspace derived from typical company split between convenience and comparison floorspace as identified by Verdict UK Food & Grocery Retailers 2015.  
d. Sales densities relate to the monetary turnover of each square metre of net sales area and are derived from Verdict UK Food & Grocery Retailers 2018.  
e. It has been assumed that all unnamed and local convenience stores within a centre are 'trading at equilibrium' (i.e. their 'benchmark' turnover equates to that identified by the survey).  
f. Survey derived performance of stores calculated by adding together 'main' and 'top up' turnover as set out in Table 4

Table 6a: Estimated 'capacity' for new convenience goods facilities in Newry, Mourne & Down

Year	Benchmark Turnover (£m) <sup>1</sup>	Survey Turnover (£m) <sup>2</sup>	Inflow (£m)	Surplus Expenditure (£m)
2022	309.0	404.2	5.2	100.4
2025	314.6	408.0	5.3	98.6
2030	315.6	414.8	5.4	104.5
2035	315.6	422.8	5.5	112.7
Study Area Market Share (%)	85.0			

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 19 (January 2022)  
2. Assumes constant market share claimed by Newry, Mourne & Down facilities at 85.0% from the Study Area  
2020 Prices

Table 6b: Gross quantitative capacity for additional convenience goods floorspace in Newry, Mourne & Down

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq m net)	
		Min <sup>1</sup>	Max <sup>2</sup>
2022	100.4	7,800	8,500
2025	98.6	7,600	8,800
2030	104.5	8,000	9,300
2035	112.7	8,600	9,900

1. Minimum average sales density at 2022 assumed to be £12,887 per sq m based on the average sales density of the leading four supermarkets as identified by GlobalData 2021  
2. Maximum average sales density at 2022 assumed to be £11,182 per sq m based on the average sales density of the leading four supermarkets and the discount operators as identified by GlobalData 2021  
3. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 19 (January 2022)  
2020 Prices

Table 6c: Extant convenience goods commitments in Newry, Mourne & Down

Destination	Reference	Proposal	Net Convenience Floorspace (sq m)	Estimated Sales Density (£/sq m)	Estimated Convenience Turnover (£m)
Bessbrook - 107 Camlough Road	P/2015/0127/F	Renewal of planning permission P/2008/1188/F for demolition of existing building and erection of No 3 No food retail units to include associated site works.	363 sq m gross (218 sq m net)	5,000	1.1
Ballynahinch - 2-6 Lisburn Street	R/2013/0581/F	Extension to existing premises.	570 sq m gross (342 sq m net)	7,500	2.6
Downpatrick - 2 New Bridge Street	RLA07/2016/0085/F	Proposed demolition of existing petrol filling station and forecourt canopy to provide new supermarket building, forecourt canopy and underground storage fuel tanks with associated drainage and services (amended layout details re boundary shared with No 1	Net increase of 112 sq m gross (67 sq m net)	7,500	0.5
Kilkeel - 55-55b Greencastle Street	P/2014/0237/F	Part demolition of existing supermarket with extension and alterations to provide additional ground floor retail and first floor storage space, office and staff accommodation, ATM, post office and sorting office, amended access provision & parking provision & associated site works, with new fuel pumps and canopy	482 sq m gross (289 sq m net)	7,500	2.2
Kilkeel - 2-6 Lisburn Street	P/2013/0889/F	Redevelopment of supermarket to create class A1 retail unit fronting Lisburn Street and replacement superstore with rear atrium in DRD Lisburn Street South car park and servicing via basement level and associated site access and landscaping works.	155 sq m net (93 sq m net)	5,000	0.5
Newcastle - 14 Castlewellan Road	LA07/2019/1212/F	Demolition of existing retail unit and filling station and development of replacement unit and filling station (new pumps, underground fuel tanks and canopy), associated parking and site works.	482 sq m net	7,500	3.6
Newcastle - Former St Mary's Primary School	LA07/2021/0786/RM	Demolition of former school building, erection of (Lidl) food store and mountain rescue, provision of car parking, landscaping, and associated site works	1,338 sq m gross (803 sq m net)	8,883	7.1
Newtownhamilton - 8 The Commons	LA07/2015/1363/F	Proposed new petrol station with associated supermarket and car parking and development	602 sq m gross (361 sq m net)	7,500	2.7
Newry - East of 41 Monaghan Street and opposite 1-23 Railway Avenue	LA07/2020/0123/O	Mixed use development to include retail (Class A1) at the ground floor with residential apartments above.	676 sq m (473 sq m net)	7,500	3.5
Newry - 109 Camlough Road	LA07/2020/0900/F	Part - demolition of petrol filling station, and reconfiguration of retail floor and storage areas, with extension to front of shop and alterations to the exterior (new shop front and new external cladding) and forecourt layout.	289 sq m (89 sq m net)	7,500	0.7
Newry - 99-101 Armagh Road	LA07/2016/0692/F	Extension to existing retail unit to provide additional sales floor space (975 Sq M), Relocation of restaurant to first floor, internal ancillary alterations, storage, modification to car park and other ancillary site works.	673 sq m net (471 sq m net)	7,500	3.5
Newry - Land east of the A1	LA07/2017/1182/F	Strategic roadside service facility incorporating petrol station, shop and restaurant services, child play area, picnic area, car, coach, lorry parking, bunkering facilities, landscaping, access roads and associated highway and site construction/excavation works	209 sq m gross (125 sq m net)	7,500	0.9
Total					28.9

Assumed 60% gross to net ratios  
2020 Prices

Table 6d: Net quantitative capacity for additional convenience goods floorspace in Newry, Mourne & Down

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min <sup>1</sup>	Max <sup>2</sup>
2022	100.4	28.9	71.5	5,500	6,000
2025	98.6	29.5	69.2	5,400	6,200
2030	104.5	29.5	75.0	5,800	6,700
2035	112.7	29.5	83.1	6,400	7,300

1. Minimum average sales density at 2022 assumed to be £12,887 per sq m based on the average sales density of the leading four supermarkets as identified by GlobalData 2021  
2. Maximum average sales density at 2022 assumed to be £11,182 per sq m based on the average sales density of the leading four supermarkets and the discount operators as identified by GlobalData 2021  
3. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 19 (January 2022)

2020 Prices

Table 7a: Population and comparison goods expenditure per capita

Zone	Population				
	2020	2022	2025	2030	2035
1	23,879	24,160	24,507	24,962	25,318
2	54,922	55,567	56,365	57,413	58,231
3	41,708	42,197	42,803	43,599	44,221
4	21,126	21,374	21,681	22,084	22,398
5	36,202	36,627	37,153	37,844	38,383
6	19,153	19,378	19,656	20,021	20,307
Total	196,990	199,301	202,165	205,923	208,859

Table 7b: Population and comparison goods expenditure

Zone	Comparison goods expenditure per capita (£)									Comparison goods expenditure per capita (£)									Comparison goods expenditure per capita (£)									Comparison goods expenditure per capita (£)								
	2020 with SFT									2020 without SFT									2022 without SFT									2025 without SFT								
	Clothes	CDs etc	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total	Clothes	CDs etc	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total	Clothes	CDs etc	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total	Clothes	CDs etc	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total
1	884	158	571	438	206	308	254	231	3,050	658	117	425	326	153	229	189	172	2,269	611	109	395	303	142	213	176	159	2,107	671	120	433	332	156	233	193	175	2,313
2	907	161	572	346	173	309	210	243	2,920	675	120	426	257	128	230	156	181	2,172	627	111	395	239	119	213	145	168	2,017	688	122	434	262	131	234	159	184	2,214
3	861	155	552	394	187	320	222	232	2,922	641	115	411	293	139	238	165	172	2,174	595	107	381	272	129	221	153	160	2,019	653	117	418	298	142	242	168	176	2,215
4	881	155	565	381	188	337	222	233	2,963	656	116	421	283	140	251	165	174	2,204	609	107	391	263	130	233	153	161	2,047	668	118	429	289	142	255	168	177	2,247
5	933	166	590	399	199	335	240	243	3,104	694	123	439	297	148	249	179	181	2,310	645	114	408	276	137	231	166	168	2,145	708	125	447	302	151	254	182	184	2,354
6	967	171	624	413	208	353	256	260	3,252	720	127	464	307	155	263	190	193	2,420	668	118	431	285	144	244	177	179	2,247	733	130	473	313	158	268	194	197	2,466

Zone	Comparison goods expenditure per capita (£)									Comparison goods expenditure per capita (£)								
	2030 without SFT									2035 without SFT								
1	745	133	481	370	173	259	214	194	2,571	845	151	546	419	197	294	243	220	2,915
2	764	136	482	292	146	260	177	205	2,461	867	154	547	331	165	295	200	232	2,790
3	726	130	465	332	158	270	187	195	2,463	823	148	527	376	179	306	212	221	2,792
4	743	131	477	321	158	284	187	197	2,497	842	149	540	364	179	322	212	223	2,831
5	787	140	497	336	167	282	203	205	2,617	892	158	564	381	190	320	230	232	2,966
6	815	144	526	348	176	298	216	219	2,742	924	163	596	394	199	338	245	248	3,108

a. Per capita expenditure derived from Experian MMG3 data (2022 report)  
b. Base population derived from Experian MMG3 data (2022 report). Projected forward to 2035 using NISRA projections for Newry, Mourne & Down  
c. Per capita expenditure projected forward using forecast growth rates taken from Table 6 of Experian Retail Planner Briefing Note 19 (January 2022)  
d. Expenditure excludes Special Forms of Trading in line with 'adjusted' allowance derived from Figure 5 of Annex 3 of Experian Retail Planner Briefing Note 19 (January 2022)

Table 8: Total comparison goods expenditure available

Zone	Comparison goods expenditure (£m)									Comparison goods expenditure (£m)									Comparison goods expenditure (£m)								
	2020									2022									2025								
	Clothes	CDs etc	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total	Clothes	CDs etc	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total	Clothes	CDs etc	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total
1	15.7	2.8	10.1	7.8	3.7	5.5	4.5	4.1	54.2	14.8	2.6	9.5	7.3	3.4	5.1	4.2	3.8	50.9	16.4	2.9	10.6	8.1	3.8	5.7	4.7	4.3	56.7
2	37.1	6.6	23.4	14.1	7.1	12.6	8.6	9.9	119.3	34.8	6.2	22.0	13.3	6.6	11.9	8.0	9.3	112.1	38.8	6.9	24.4	14.8	7.4	13.2	9.0	10.4	124.8
3	26.7	4.8	17.1	12.2	5.8	9.9	6.9	7.2	90.7	25.1	4.5	16.1	11.5	5.5	9.3	6.5	6.8	85.2	28.0	5.0	17.9	12.8	6.1	10.4	7.2	7.5	94.8
4	13.8	2.4	8.9	6.0	3.0	5.3	3.5	3.7	46.6	13.0	2.3	8.3	5.6	2.8	5.0	3.3	3.4	43.8	14.5	2.6	9.3	6.3	3.1	5.5	3.7	3.8	48.7
5	25.1	4.5	15.9	10.7	5.3	9.0	6.5	6.5	83.6	23.6	4.2	14.9	10.1	5.0	8.5	6.1	6.2	78.6	26.3	4.7	16.6	11.2	5.6	9.4	6.8	6.8	87.4
6	13.8	2.4	8.9	5.9	3.0	5.0	3.6	3.7	46.3	12.9	2.3	8.4	5.5	2.8	4.7	3.4	3.5	43.5	14.4	2.5	9.3	6.1	3.1	5.3	3.8	3.9	48.5
Total	132.3	23.5	84.3	56.7	27.8	47.4	33.6	35.1	440.7	124.3	22.1	79.2	53.3	26.1	44.5	31.5	33.0	414.0	138.3	24.6	88.2	59.4	29.1	49.5	35.1	36.7	460.9

Zone	Comparison goods expenditure (£m)									Comparison goods expenditure (£m)								
	2030									2035								
	Clothes	CDs etc	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total	Clothes	CDs etc	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total
1	18.6	3.3	12.0	9.2	4.3	6.5	5.3	4.9	64.2	21.4	3.8	13.8	10.6	5.0	7.4	6.1	5.6	73.8
2	43.9	7.8	27.7	16.7	8.4	14.9	10.1	11.8	141.3	50.5	8.9	31.8	19.3	9.6	17.2	11.7	13.5	162.5
3	31.7	5.7	20.3	14.5	6.9	11.8	8.1	8.5	107.4	36.4	6.5	23.3	16.6	7.9	13.5	9.4	9.8	123.5
4	16.4	2.9	10.5	7.1	3.5	6.3	4.1	4.3	55.2	18.9	3.3	12.1	8.1	4.0	7.2	4.8	5.0	63.4
5	29.8	5.3	18.8	12.7	6.3	10.7	7.7	7.8	99.0	34.2	6.1	21.6	14.6	7.3	12.3	8.8	8.9	113.8
6	16.3	2.9	10.5	7.0	3.5	6.0	4.3	4.4	54.9	18.8	3.3	12.1	8.0	4.0	6.9	5.0	5.0	63.1
Total	156.6	27.8	99.9	67.2	32.9	56.1	39.8	41.6	521.9	180.1	32.0	114.8	77.3	37.8	64.5	45.7	47.8	600.1

Notes:  
a. Per capita expenditure derived from Experian MMG3 data (2022 report)

2020 Prices

Table 9: Clothing & footwear shopping patterns

Destination	Total Clothing (%)	Zone 1 Clothing (%)	Zone 2 Clothing (%)	Zone 3 Clothing (%)	Zone 4 Clothing (%)	Zone 5 Clothing (%)	Zone 6 Clothing (%)
Zone 1 NI							
Crossmaglen Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cullaville Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, Newry Road, Crossmaglen	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Dundalk Street, Newtownhamilton, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Main Street, Forkhill, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newtownhamilton Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nisa, Carrickasticken Road, Forkhill, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Concession Road, Cullaville, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Vivo (Murphy's), Silverbridge Road, Silverbridge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 1 sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 NI							
Bessbrook Village Centre	0.5%	1.6%	0.9%	0.0%	0.0%	0.0%	0.0%
Bravo Max, Corn Market, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Buttercrane Shopping Centre, Buttercrane Quay, Newry	3.7%	0.7%	7.9%	4.0%	4.0%	0.0%	0.0%
Camlough Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Warrenpoint Road, Greenbank, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter (Grant's), Hilltown Road, Mayobridge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Bettyshill Road, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Dublin Road, Cloughoge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Damolly Retail Park, Armagh Road, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, Old Creamery Shopping Centre, Newry	0.6%	0.7%	1.9%	0.0%	0.0%	0.0%	0.0%
Fiveways Shop and Service Station, Armagh Road, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Monaghan Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Castle Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Cloghanramer Road, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mayobridge Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newry City Centre	46.1%	53.2%	72.8%	70.2%	26.7%	3.5%	1.0%
Nisa, Main Street, Camlough, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
O'Hare's Supermarket, Newry Road, Mayobridge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Old Creamery Retail Park, Monaghan Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others Zone 2	0.1%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%
Sainsbury's, The Quays, Newry	1.6%	0.8%	0.0%	7.7%	0.0%	0.0%	0.0%
Spar, Buttercrane Shopping Centre, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Hill Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Downshire Road, Carneyhough Court, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Good Food Shop, Hill Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Quays, Bridge Street, Newry	2.3%	3.7%	5.9%	0.0%	0.8%	0.0%	0.0%
The Village Shop, The Village, Jonesborough, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 sub-total	54.9%	60.6%	89.4%	81.8%	32.6%	3.5%	1.0%
Zone 3 NI							
Annalong Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Newcastle Street, Kilkeel, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, (Grant's) Bog Road, Kilkeel	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Bog Road, Kilkeel, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, The Square, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kilkeel Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Main Street, Rathfriland, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Milestone Service Station, Newry Street, Rathfriland, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nisa Fresh Food Centre, Church Street, Warrenpoint, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Greencastle Street, Kilkeel, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Vivo (Murdock's), Upper Dromore Road, Warrenpoint, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Warrenpoint Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 3 sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 4 NI							
Castlewellan Town Centre	0.4%	0.0%	0.0%	0.0%	3.2%	0.0%	0.0%
Centra, Railway Street, Newcastle	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Railway Street, Newcastle	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newcastle Town Centre	2.5%	0.0%	0.0%	2.3%	16.6%	1.0%	0.0%
Others Zone 4	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Castlewellan Road, Newcastle	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 4 sub-total	2.9%	0.0%	0.0%	2.3%	19.8%	1.0%	0.0%
Zone 5 NI							
Ardglass Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Ballydugan Retail Park, Downpatrick	0.4%	0.0%	0.0%	0.0%	1.2%	1.3%	0.0%
Ballyhornan Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Lisdoonan, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Market Street, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, The Ballymote Centre, Killough Road, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Crossgar Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Downpatrick Town Centre	5.1%	0.0%	0.0%	1.0%	9.7%	18.9%	6.1%
Killyleagh Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others Zone 5	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Downpatrick Road, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Killough Road, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 5 sub-total	5.4%	0.0%	0.0%	1.0%	10.8%	20.2%	6.1%

Zone 6 NI							
Ballynahinch Town Centre	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	4.7%
Iceland, High Street, Ballynahinch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Harmony Way, Ballynahinch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Morrisons Vivoxtra, Ballynahinch Road, Saintfield, Ballynahinch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Saintfield Village Centre	0.2%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%
Zone 6 sub-total	0.6%	0.0%	0.0%	0.0%	0.0%	1.0%	4.7%
District sub-total	63.9%	60.6%	89.4%	85.1%	63.2%	25.6%	11.8%
Zone 7 NI							
Ardkeen Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cloughy Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Portaferry Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Portavogie Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 7 sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other NI Outside Study Area							
Ards Shopping Centre, Circular Road, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Armagh Town Centre	1.0%	7.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Bridge Street, Portadown	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ballywalter Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Banbridge Town Centre	3.4%	0.7%	5.4%	4.9%	2.5%	2.3%	1.0%
Bangor Town Centre	0.1%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%
Belfast City Centre	12.0%	0.7%	2.1%	2.1%	16.5%	39.5%	24.4%
Belleek Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bloomfield Shopping Centre & Retail Park, South Circular Road, Bangor	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Boucher Retail Park, Boucher Road, Belfast	0.6%	0.0%	0.0%	0.0%	0.0%	3.7%	0.0%
Centra, Armagh Road, Keady	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Portadown Road, Deansbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Clandeboyne Retail Park, West Circular Road, Bangor	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, Lisburn Street, Hillsborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Ballygowan Road, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Scarva Street, Lough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Donaghadee Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dungannon Town Centre	0.2%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, Scarva Street, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Forestside Shopping Centre, Upper Galwally, Belfast	2.8%	0.0%	0.0%	0.0%	1.7%	13.8%	3.1%
Hillsborough Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hollywood Exchange, Airport Road West, Belfast	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hollywood Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Meadow Lane, Portadown	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Newry Street, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Keady Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kircubbin Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Moy Road, Armagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lisburn City Centre	5.3%	0.9%	0.0%	0.0%	5.4%	9.8%	31.1%
Markethill Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newtownards Town Centre	1.4%	0.0%	0.0%	0.0%	0.8%	3.1%	8.1%
Nisa Local, Main Street, Markethill, Armagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Main Street, Carrowdore, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Meeting Street, Dromore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Springhill Retail Park, Killeen Avenue, Bangor	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sprucefield Park, Hillsborough Road, Lisburn	2.2%	1.6%	0.0%	0.0%	2.8%	2.1%	14.5%
Supervalu, Banbridge Road, Dromore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Castle Street, Comber, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Bridgewater Retail Park, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Castlebawn Drive, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Outlet Bridgewater Park, Cascum Road, Banbridge	1.6%	0.0%	1.3%	5.0%	1.8%	0.0%	0.0%
Other NI Outside Study Area sub-total	30.7%	13.5%	8.8%	12.0%	32.3%	74.4%	82.3%
Castleblayney Zone RoI							
Castleblayney Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Main Street, Black Island, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Monaghan Road, Moraghy, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Londis, Dublin Road, Onomy, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Glencarn Town Centre, Conabury, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Watter Supermarket, Dublin Road, Onomy, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Castleblayney sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carrickmacross Zone RoI							
Aldi, Riverside Road, Drummond Otra, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carrickmacross Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Ardee Road, Drummond Otra, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Market Square Shopping Centre, Drummond Etra, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carrickmacross sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Dundalk Zone RoI							
Aldi, Newry Road, Lisdoo, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carlingford Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carthage Supermarket, Clanbrassil Street, Townparks, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Clanbrassil Street, Townparks, Dundalk, Co. Louth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundalk Retail Park, Marshes Upper, Dundalk	0.5%	2.6%	0.0%	1.0%	0.0%	0.0%	0.0%
Dundalk Town Centre	0.8%	6.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, Ard Easmuinn Road, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, Hoey's Lane, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Home Savers, Dundalk Retail Park, Inner Relief Road, Marshes Upper, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Castle Road, Townparks, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Avenue Road, Greenacres, Marshes Lower, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Carrickmacross Road, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Castletown Road, Moorland, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marshes Shopping Centre, Marshes Avenue, Marshes Lower, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Northlink Retail Park, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Dublin Road, Townparks, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Dundalk Shopping Centre, Stapleton Drive, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Metro, Longwalk Shopping Centre, The Long Walk, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundalksub-total	1.3%	8.7%	0.0%	1.0%	0.0%	0.0%	0.0%
Drogheda Zone RoI							
Aldi, Slane Road, Mell, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ardee Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Ballsgrove Shoping Centre, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Boyne Centre, Bolton Square, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Drogheda Retail & Leisure Centre, Rathmullan Road, Rathmullan, Louth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Plattin Road, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Dublin Road, Wheaton Hall, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Drogheda Retail Park, Donore Road, Rathmullan, Meath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Drogheda Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunleer Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, Scotch Hall Shopping Centre, Marsh Road, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, South Gate Shopping Centre, Colpe Cross, Grange Rath, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, West Street, Downtown Drogheda, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Euro 2, West Street, Downtown Drogheda, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, Bredin Street, East Drogheda, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Donore Road, Lagavooren, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Mell, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Londis (Top Shop), Marian Park, Crushrod Avenue, Yellowbatter, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
M1 Retail Park, Mell, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Duleek Street, Lagavooren, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Wheaton Hall, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
On The Run, The Court, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Scotch Hall Shopping Centre, Marsh Road, Lagavooren, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Donore Road, Matthew's Lane, Lagavooren, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Metro, West Street, Downtown Drogheda, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Drogheda sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other RoI Outside Study Area							
Dublin City Centre	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%
Dundrum Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Monaghan Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Clones Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other ROI Outside Study Area sub-total	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%
Others							
Other	3.1%	17.2%	0.0%	1.0%	4.4%	0.0%	2.3%
Abroad	1.0%	0.0%	1.9%	1.0%	0.0%	0.0%	2.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



Other NI Outside Study Area							
Armagh Town Centre	£1.1	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0
Asda, Bridge Street, Portadown	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Banbridge Town Centre	£4.2	£0.1	£1.9	£1.2	£0.3	£0.5	£0.1
Bangor Town Centre	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0
Belfast City Centre	£16.0	£0.1	£0.7	£0.5	£2.1	£9.3	£3.2
Bloomfield Shopping Centre & Retail Park, South Circular Road, Bangor	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Boucher Retail Park, Boucher Road, Belfast	£0.9	£0.0	£0.0	£0.0	£0.0	£0.9	£0.0
Centra, Armagh Road, Keady	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Donaghadee Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dungannon Town Centre	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0
Forestside Shopping Centre, Upper Galwally, Belfast	£3.9	£0.0	£0.0	£0.0	£0.2	£3.3	£0.4
Hollywood Exchange, Airport Road West, Belfast	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Keady Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Lisburn City Centre	£7.2	£0.1	£0.0	£0.0	£0.7	£2.3	£4.0
Markethill Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Newtownards Town Centre	£1.9	£0.0	£0.0	£0.0	£0.1	£0.7	£1.1
Springhill Retail Park, Killeen Avenue, Bangor	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sprucefield Park, Hillsborough Road, Lisburn	£3.0	£0.2	£0.0	£0.0	£0.4	£0.5	£1.9
Tesco Extra, Bridgewater Retail Park, Banbridge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Castlebawn Drive, Newtownards	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
The Outlet Bridgewater Park, Cascum Road, Banbridge	£2.0	£0.0	£0.5	£1.3	£0.2	£0.0	£0.0
Other NI Outside Study Area sub-total	£40.5	£2.0	£3.1	£3.0	£4.2	£17.6	£10.7
Castleblayney Zone RoI							
Lidl, Monaghan Road, Moraghy, Castleblayney	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Castleblayney sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Carrickmacross Zone RoI							
Carrickmacross sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalk Zone RoI							
Aldi, Newry Road, Lisdoon, Dundalk	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalk Retail Park, Marshes Upper, Dundalk	£0.6	£0.4	£0.0	£0.2	£0.0	£0.0	£0.0
Dundalk Town Centre	£0.9	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0
Home Savers, Dundalk Retail Park, Inner Relief Road, Marshes Upper, Dundalk	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Dublin Road, Townparks, Dundalk	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalksub-total	£1.5	£1.3	£0.0	£0.2	£0.0	£0.0	£0.0
Drogheda Zone RoI							
Drogheda Retail Park, Donore Road, Rathmullan, Meath	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Drogheda Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Drogheda sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other ROI Outside Study Area							
Dublin City Centre	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Dundrum Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other ROI Outside Study Area sub-total	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Others							
Other	£3.7	£2.5	£0.0	£0.2	£0.6	£0.0	£0.3
Abroad	£1.2	£0.0	£0.7	£0.2	£0.0	£0.0	£0.3
Total	£124.3	£14.8	£34.8	£25.1	£13.0	£23.6	£13.0

Table 11: Books, CDs, DVDs (small media items) shopping patterns

Destination	Total Books etc (%)	Zone 1 Books etc (%)	Zone 2 Books etc (%)	Zone 3 Books etc (%)	Zone 4 Books etc (%)	Zone 5 Books etc (%)	Zone 6 Books etc (%)
Zone 1 NI							
Crossmaglen Town Centre	1.2%	7.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Cullaville Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, Newry Road, Crossmaglen	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Dundalk Street, Newtownhamilton, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Main Street, Forkhill, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newtownhamilton Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nisa, Carrickasticken Road, Forkhill, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Concession Road, Cullaville, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Vivo (Murphy's), Silverbridge Road, Silverbridge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 1 sub-total	1.2%	7.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 NI							
Bessbrook Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bravo Max, Corn Market, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Buttercrane Shopping Centre, Buttercrane Quay, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Camlough Village Centre	0.3%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Warrenpoint Road, Greenbank, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter (Grant's), Hilltown Road, Mayobridge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Bettyshill Road, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Dublin Road, Cloughoge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Damolly Retail Park, Armagh Road, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, Old Creamery Shopping Centre, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Fiveways Shop and Service Station, Armagh Road, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Monaghan Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Castle Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Cloghanramer Road, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mayobridge Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newry City Centre	26.6%	29.8%	64.1%	16.6%	13.4%	0.0%	0.0%
Nisa, Main Street, Camlough, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
O'Hare's Supermarket, Newry Road, Mayobridge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Old Creamery Retail Park, Monaghan Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others Zone 2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's, The Quays, Newry	3.0%	2.3%	0.0%	10.7%	0.0%	0.0%	0.0%
Spar, Buttercrane Shopping Centre, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Hill Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Downshire Road, Carneyhough Court, Newry	1.9%	5.0%	4.5%	0.0%	0.0%	0.0%	0.0%
The Good Food Shop, Hill Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Quays, Bridge Street, Newry	6.2%	2.7%	22.4%	0.0%	0.0%	0.0%	0.0%
The Village Shop, The Village, Jonesborough, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 sub-total	38.0%	42.1%	91.1%	27.3%	13.4%	0.0%	0.0%
Zone 3 NI							
Annalong Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Newcastle Street, Kilkeel, Newry	2.5%	0.0%	0.0%	10.3%	0.0%	0.0%	0.0%
Costcutter, (Grant's) Bog Road, Kilkeel	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Bog Road, Kilkeel, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, The Square, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kilkeel Town Centre	4.8%	0.0%	0.0%	19.5%	0.0%	0.0%	0.0%
Mace, Main Street, Rathfriland, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Milestone Service Station, Newry Street, Rathfriland, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nisa Fresh Food Centre, Church Street, Warrenpoint, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Greencastle Street, Kilkeel, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Vivo (Murdock's), Upper Dromore Road, Warrenpoint, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Warrenpoint Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 3 sub-total	7.3%	0.0%	0.0%	29.8%	0.0%	0.0%	0.0%
Zone 4 NI							
Castlewellan Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Railway Street, Newcastle	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Railway Street, Newcastle	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newcastle Town Centre	4.0%	0.0%	0.0%	0.0%	34.2%	0.0%	0.0%
Others Zone 4	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Castlewellan Road, Newcastle	0.6%	0.0%	0.0%	0.0%	5.5%	0.0%	0.0%
Zone 4 sub-total	4.7%	0.0%	0.0%	0.0%	39.7%	0.0%	0.0%
Zone 5 NI							
Ardglass Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Ballydugan Retail Park, Downpatrick	3.8%	0.0%	0.0%	0.0%	0.0%	22.9%	10.2%
Ballyhornan Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Lisdoonan, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Market Street, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, The Ballymote Centre, Killough Road, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Crossgar Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Downpatrick Town Centre	2.6%	0.0%	0.0%	2.6%	0.0%	17.0%	0.0%
Killyleagh Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others Zone 5	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Downpatrick Road, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Killough Road, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 5 sub-total	6.5%	0.0%	0.0%	2.6%	0.0%	39.9%	10.2%

Zone 6 NI							
Ballynahinch Town Centre	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	5.4%
Iceland, High Street, Ballynahinch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Harmony Way, Ballynahinch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Morrisons Vivoxtra, Ballynahinch Road, Saintfield, Ballynahinch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Saintfield Village Centre	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	7.5%
Zone 6 sub-total	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	12.8%
District sub-total	59.0%	50.0%	91.1%	59.7%	53.1%	39.9%	23.0%
Zone 7 NI							
Ardkeen Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cloughy Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Portaferry Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Portavogie Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 7 sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other NI Outside Study Area							
Ards Shopping Centre, Circular Road, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Armagh Town Centre	2.0%	13.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Bridge Street, Portadown	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ballywalter Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Banbridge Town Centre	2.6%	0.0%	0.0%	10.7%	0.0%	0.0%	0.0%
Bangor Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Belfast City Centre	15.4%	7.9%	8.9%	6.7%	24.1%	44.0%	19.8%
Belleek Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bloomfield Shopping Centre & Retail Park, South Circular Road, Bangor	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Boucher Retail Park, Boucher Road, Belfast	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Armagh Road, Keady	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Portadown Road, Deansbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Clandeboyce Retail Park, West Circular Road, Bangor	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, Lisburn Street, Hillsborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Ballygowan Road, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Scarva Street, Lough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Donaghadee Town Centre	3.1%	0.0%	0.0%	12.6%	0.0%	0.0%	0.0%
Dungannon Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, Scarva Street, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Forestside Shopping Centre, Upper Galwally, Belfast	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hillsborough Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hollywood Exchange, Airport Road West, Belfast	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hollywood Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Meadow Lane, Portadown	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Newry Street, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Keady Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kircubbin Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Moy Road, Armagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lisburn City Centre	6.1%	0.0%	0.0%	0.0%	6.1%	0.0%	47.0%
Markethill Village Centre	1.2%	7.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Newtownards Town Centre	0.6%	0.0%	0.0%	0.0%	0.0%	4.7%	0.0%
Nisa Local, Main Street, Markethill, Armagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Main Street, Carrowdore, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Meeting Street, Dromore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Springhill Retail Park, Killeen Avenue, Bangor	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sprucefield Park, Hillsborough Road, Lisburn	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Banbridge Road, Dromore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Castle Street, Comber, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Bridgewater Retail Park, Banbridge	1.6%	0.0%	0.0%	0.0%	14.0%	0.0%	0.0%
Tesco Extra, Castlebawn Drive, Newtownards	1.1%	0.0%	0.0%	0.0%	0.0%	5.7%	3.7%
The Outlet Bridgewater Park, Cascum Road, Banbridge	0.9%	0.0%	0.0%	3.6%	0.0%	0.0%	0.0%
Other NI Outside Study Area sub-total	34.6%	29.6%	8.9%	33.6%	44.2%	54.4%	70.6%
Castleblayney Zone RoI							
Castleblayney Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Main Street, Black Island, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Monaghan Road, Moraghy, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Londis, Dublin Road, Onomy, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Glencarn Town Centre, Conabury, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Watter Supermarket, Dublin Road, Onomy, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Castleblayney sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carrickmacross Zone RoI							
Aldi, Riverside Road, Drummond Otra, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carrickmacross Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Ardee Road, Drummond Otra, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Market Square Shopping Centre, Drummond Etra, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carrickmacross sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Dundalk Zone RoI							
Aldi, Newry Road, Lisdoo, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carlingford Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carthage Supermarket, Clanbrassil Street, Townparks, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Clanbrassil Street, Townparks, Dundalk, Co. Louth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundalk Retail Park, Marshes Upper, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundalk Town Centre	1.2%	7.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, Ard Easmuinn Road, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, Hoey's Lane, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Home Savers, Dundalk Retail Park, Inner Relief Road, Marshes Upper, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Castle Road, Townparks, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Avenue Road, Greenacres, Marshes Lower, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Carrickmacross Road, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Castletown Road, Moorland, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marshes Shopping Centre, Marshes Avenue, Marshes Lower, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Northlink Retail Park, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Dublin Road, Townparks, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Dundalk Shopping Centre, Stapleton Drive, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Metro, Longwalk Shopping Centre, The Long Walk, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundalksub-total	1.2%	7.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Drogheda Zone RoI							
Aldi, Slane Road, Mell, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ardee Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Ballsgrove Shoping Centre, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Boyne Centre, Bolton Square, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Drogheda Retail & Leisure Centre, Rathmullan Road, Rathmullan, Louth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Plattin Road, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Dublin Road, Wheaton Hall, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Drogheda Retail Park, Donore Road, Rathmullan, Meath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Drogheda Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunleer Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, Scotch Hall Shopping Centre, Marsh Road, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, South Gate Shopping Centre, Colpe Cross, Grange Rath, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, West Street, Downtown Drogheda, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Euro 2, West Street, Downtown Drogheda, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, Bredin Street, East Drogheda, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Donore Road, Lagavooren, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Mell, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Londis (Top Shop), Marian Park, Crushrod Avenue, Yellowbatter, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
M1 Retail Park, Mell, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Duleek Street, Lagavooren, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Wheaton Hall, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
On The Run, The Court, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Scotch Hall Shopping Centre, Marsh Road, Lagavooren, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Donore Road, Matthew's Lane, Lagavooren, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Metro, West Street, Downtown Drogheda, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Drogheda sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other RoI Outside Study Area							
Dublin City Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundrum Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Monaghan Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Clones Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other ROI Outside Study Area sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others							
Other	5.2%	12.5%	0.0%	6.7%	2.8%	5.7%	6.4%
Abroad	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



Other NI Outside Study Area							
Armagh Town Centre	£0.4	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0
Asda, Bridge Street, Portadown	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Banbridge Town Centre	£0.5	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0
Bangor Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Belfast City Centre	£3.9	£0.2	£0.6	£0.3	£0.6	£1.8	£0.5
Bloomfield Shopping Centre & Retail Park, South Circular Road, Bangor	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Boucher Retail Park, Boucher Road, Belfast	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Centra, Armagh Road, Keady	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Donaghadee Town Centre	£0.6	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0
Dungannon Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Forestside Shopping Centre, Upper Galwally, Belfast	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Hollywood Exchange, Airport Road West, Belfast	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Keady Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Lisburn City Centre	£1.2	£0.0	£0.0	£0.0	£0.1	£0.0	£1.1
Markethill Village Centre	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0
Newtownards Town Centre	£0.2	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0
Springhill Retail Park, Killeen Avenue, Bangor	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sprucefield Park, Hillsborough Road, Lisburn	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Bridgewater Retail Park, Banbridge	£0.3	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0
Tesco Extra, Castlebawn Drive, Newtownards	£0.3	£0.0	£0.0	£0.0	£0.0	£0.2	£0.1
The Outlet Bridgewater Park, Cascum Road, Banbridge	£0.2	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0
Other NI Outside Study Area sub-total	£7.8	£0.8	£0.6	£1.5	£1.0	£2.3	£1.6
Castleblayney Zone RoI							
Lidl, Monaghan Road, Moraghy, Castleblayney	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Castleblayney sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Carrickmacross Zone RoI							
Carrickmacross sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalk Zone RoI							
Aldi, Newry Road, Lisdoon, Dundalk	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalk Retail Park, Marshes Upper, Dundalk	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalk Town Centre	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0
Home Savers, Dundalk Retail Park, Inner Relief Road, Marshes Upper, Dundalk	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Dublin Road, Townparks, Dundalk	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalksub-total	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0
Drogheda Zone RoI							
Drogheda Retail Park, Donore Road, Rathmullan, Meath	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Drogheda Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Drogheda sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other ROI Outside Study Area							
Dublin City Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundrum Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other ROI Outside Study Area sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Others							
Other	£1.1	£0.3	£0.0	£0.3	£0.1	£0.2	£0.1
Abroad	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Total	£22.1	£2.6	£6.2	£4.5	£2.3	£4.2	£2.3

Table 13: Small Household Goods shopping patterns

Destination	Total Small H'Hold (%)	Zone 1 Small H'Hold (%)	Zone 2 Small H'hold (%)	Zone 3 Small H'Hold (%)	Zone 4 Small H'Hold (%)	Zone 5 Small H'Hold (%)	Zone 6 Small H'Hold (%)
Zone 1 NI							
Crossmaglen Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cullaville Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, Newry Road, Crossmaglen	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Dundalk Street, Newtownhamilton, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Main Street, Forkhill, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newtownhamilton Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nisa, Carrickasticken Road, Forkhill, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Concession Road, Cullaville, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Vivo (Murphy's), Silverbridge Road, Silverbridge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 1 sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 NI							
Bessbrook Village Centre	0.3%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Bravo Max, Corn Market, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Buttercrane Shopping Centre, Buttercrane Quay, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Camlough Village Centre	1.6%	0.0%	6.6%	0.0%	0.0%	0.0%	0.0%
Centra, Warrenpoint Road, Greenbank, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter (Grant's), Hilltown Road, Mayobridge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Bettyshill Road, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Dublin Road, Cloughoge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Damolly Retail Park, Armagh Road, Newry	3.3%	4.9%	2.1%	9.6%	0.0%	0.0%	0.0%
Dunnes Stores, Old Creamery Shopping Centre, Newry	0.8%	2.3%	2.1%	0.0%	0.0%	0.0%	0.0%
Fiveways Shop and Service Station, Armagh Road, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Monaghan Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Castle Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Cloghanramer Road, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mayobridge Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newry City Centre	31.7%	46.5%	70.4%	28.4%	19.6%	0.0%	0.0%
Nisa, Main Street, Camlough, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
O'Hare's Supermarket, Newry Road, Mayobridge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Old Creamery Retail Park, Monaghan Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others Zone 2	0.6%	0.0%	1.7%	0.0%	1.7%	0.0%	0.0%
Sainsbury's, The Quays, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Buttercrane Shopping Centre, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Hill Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Downshire Road, Carneyhough Court, Newry	0.3%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%
The Good Food Shop, Hill Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Quays, Bridge Street, Newry	1.6%	0.0%	6.6%	0.0%	0.0%	0.0%	0.0%
The Village Shop, The Village, Jonesborough, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 sub-total	40.2%	57.9%	89.4%	38.0%	21.3%	0.0%	0.0%
Zone 3 NI							
Annalong Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Newcastle Street, Kilkeel, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, (Grant's) Bog Road, Kilkeel	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Bog Road, Kilkeel, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, The Square, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kilkeel Town Centre	8.0%	0.0%	0.0%	35.2%	0.0%	0.0%	0.0%
Mace, Main Street, Rathfriland, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Milestone Service Station, Newry Street, Rathfriland, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nisa Fresh Food Centre, Church Street, Warrenpoint, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Greencastle Street, Kilkeel, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Vivo (Murdock's), Upper Dromore Road, Warrenpoint, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Warrenpoint Town Centre	1.4%	0.0%	0.0%	6.2%	0.0%	0.0%	0.0%
Zone 3 sub-total	9.4%	0.0%	0.0%	41.4%	0.0%	0.0%	0.0%
Zone 4 NI							

Zone 6 NI							
Ballynahinch Town Centre	1.3%	0.0%	0.0%	0.0%	0.0%	1.3%	13.2%
Iceland, High Street, Ballynahinch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Harmony Way, Ballynahinch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Morrisons Vivoxtra, Ballynahinch Road, Saintfield, Ballynahinch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Saintfield Village Centre	1.1%	0.0%	0.0%	0.0%	0.0%	1.3%	10.0%
Zone 6 sub-total	2.4%	0.0%	0.0%	0.0%	0.0%	2.6%	23.2%
District sub-total	63.9%	57.9%	89.4%	80.6%	44.5%	43.7%	29.3%
Zone 7 NI							
Ardkeen Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cloughy Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Portaferry Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Portavogie Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 7 sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other NI Outside Study Area							
Ards Shopping Centre, Circular Road, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Armagh Town Centre	1.3%	9.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Bridge Street, Portadown	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ballywalter Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Banbridge Town Centre	1.6%	0.0%	2.1%	5.0%	0.0%	0.0%	0.0%
Bangor Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Belfast City Centre	9.9%	0.0%	3.8%	9.2%	23.2%	14.4%	18.7%
Belleek Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bloomfield Shopping Centre & Retail Park, South Circular Road, Bangor	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Boucher Retail Park, Boucher Road, Belfast	1.9%	3.6%	0.0%	0.0%	0.0%	5.5%	2.4%
Centra, Armagh Road, Keady	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Portadown Road, Deansbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Clandeboyce Retail Park, West Circular Road, Bangor	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, Lisburn Street, Hillsborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Ballygowan Road, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Scarva Street, Lough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Donaghadee Town Centre	0.3%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%
Dungannon Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, Scarva Street, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Forestside Shopping Centre, Upper Galwally, Belfast	1.5%	0.0%	0.0%	0.0%	1.4%	6.4%	0.0%
Hillsborough Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hollywood Exchange, Airport Road West, Belfast	7.2%	7.0%	0.0%	1.5%	11.2%	15.3%	18.1%
Hollywood Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Meadow Lane, Portadown	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Newry Street, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Keady Village Centre	0.1%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Kircubbin Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Moy Road, Armagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lisburn City Centre	2.9%	0.0%	0.0%	0.0%	4.8%	2.6%	23.7%
Markethill Village Centre	1.2%	2.4%	2.4%	0.0%	3.1%	0.0%	0.0%
Newtownards Town Centre	2.8%	0.0%	0.0%	0.0%	0.0%	12.2%	2.1%
Nisa Local, Main Street, Markethill, Armagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Main Street, Carrowdore, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Meeting Street, Dromore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Springhill Retail Park, Killeen Avenue, Bangor	0.3%	0.0%	0.0%	0.0%	1.4%	0.0%	1.7%
Sprucefield Park, Hillsborough Road, Lisburn	0.5%	0.0%	0.0%	0.0%	1.7%	0.0%	4.1%
Supervalu, Banbridge Road, Dromore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Castle Street, Comber, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Bridgewater Retail Park, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Castlebawn Drive, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Outlet Bridgewater Park, Cascum Road, Banbridge	0.8%	0.9%	2.4%	0.0%	1.4%	0.0%	0.0%
Other NI Outside Study Area sub-total	32.3%	24.7%	10.6%	16.8%	48.3%	56.3%	70.7%
Castleblayney Zone RoI							
Castleblayney Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Main Street, Black Island, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Monaghan Road, Moraghy, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Londis, Dublin Road, Onomy, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Glencarn Town Centre, Conabury, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Watter Supermarket, Dublin Road, Onomy, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Castleblayney sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carrickmacross Zone RoI							
Aldi, Riverside Road, Drummond Otra, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carrickmacross Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Ardee Road, Drummond Otra, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Market Square Shopping Centre, Drummond Etra, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carrickmacross sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Dundalk Zone RoI							
Aldi, Newry Road, Lisdoon, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carlingford Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carthage Supermarket, Clanbrassil Street, Townparks, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Clanbrassil Street, Townparks, Dundalk, Co. Louth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundalk Retail Park, Marshes Upper, Dundalk	0.6%	4.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundalk Town Centre	1.3%	9.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, Ard Easmuinn Road, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, Hoey's Lane, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Home Savers, Dundalk Retail Park, Inner Relief Road, Marshes Upper, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Castle Road, Townparks, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Avenue Road, Greenacres, Marshes Lower, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Carrickmacross Road, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Castletown Road, Moorland, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marshes Shopping Centre, Marshes Avenue, Marshes Lower, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Northlink Retail Park, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Dublin Road, Townparks, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Dundalk Shopping Centre, Stapleton Drive, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Metro, Longwalk Shopping Centre, The Long Walk, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundalksub-total	1.9%	13.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Drogheda Zone RoI							
Aldi, Slane Road, Mell, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ardee Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Ballsgrove Shoping Centre, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Boyne Centre, Bolton Square, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Drogheda Retail & Leisure Centre, Rathmullan Road, Rathmullan, Louth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Plattin Road, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Dublin Road, Wheaton Hall, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Drogheda Retail Park, Donore Road, Rathmullan, Meath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Drogheda Town Centre	0.2%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunleer Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, Scotch Hall Shopping Centre, Marsh Road, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, South Gate Shopping Centre, Colpe Cross, Grange Rath, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, West Street, Downtown Drogheda, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Euro 2, West Street, Downtown Drogheda, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, Bredin Street, East Drogheda, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Donore Road, Lagavooren, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Mell, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Londis (Top Shop), Marian Park, Crushrod Avenue, Yellowbatter, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
M1 Retail Park, Mell, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Duleek Street, Lagavooren, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Wheaton Hall, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
On The Run, The Court, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Scotch Hall Shopping Centre, Marsh Road, Lagavooren, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Donore Road, Matthew's Lane, Lagavooren, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Metro, West Street, Downtown Drogheda, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Drogheda sub-total	0.2%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Other RoI Outside Study Area							
Dublin City Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundrum Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Monaghan Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Clones Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other ROI Outside Study Area sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others							
Other	1.5%	2.3%	0.0%	2.6%	5.8%	0.0%	0.0%
Abroad	0.1%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



Other NI Outside Study Area							
Armagh Town Centre	£0.9	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0
Asda, Bridge Street, Portadown	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Banbridge Town Centre	£1.3	£0.0	£0.5	£0.8	£0.0	£0.0	£0.0
Bangor Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Belfast City Centre	£8.0	£0.0	£0.8	£1.5	£1.9	£2.1	£1.6
Bloomfield Shopping Centre & Retail Park, South Circular Road, Bangor	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Boucher Retail Park, Boucher Road, Belfast	£1.4	£0.3	£0.0	£0.0	£0.0	£0.8	£0.2
Centra, Armagh Road, Keady	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Donaghadee Town Centre	£0.2	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0
Dungannon Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Forestside Shopping Centre, Upper Galwally, Belfast	£1.1	£0.0	£0.0	£0.0	£0.1	£0.9	£0.0
Hollywood Exchange, Airport Road West, Belfast	£5.6	£0.7	£0.0	£0.2	£0.9	£2.3	£1.5
Keady Village Centre	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
Lisburn City Centre	£2.8	£0.0	£0.0	£0.0	£0.4	£0.4	£2.0
Markethill Village Centre	£1.0	£0.2	£0.5	£0.0	£0.3	£0.0	£0.0
Newtownards Town Centre	£2.0	£0.0	£0.0	£0.0	£0.0	£1.8	£0.2
Springhill Retail Park, Killeen Avenue, Bangor	£0.3	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
Sprucefield Park, Hillsborough Road, Lisburn	£0.5	£0.0	£0.0	£0.0	£0.1	£0.0	£0.3
Tesco Extra, Bridgewater Retail Park, Banbridge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Castlebawn Drive, Newtownards	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
The Outlet Bridgewater Park, Cascum Road, Banbridge	£0.7	£0.1	£0.5	£0.0	£0.1	£0.0	£0.0
Other NI Outside Study Area sub-total	£25.7	£2.4	£2.3	£2.7	£4.0	£8.4	£5.9
Castleblayney Zone RoI							
Lidl, Monaghan Road, Moraghy, Castleblayney	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Castleblayney sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Carrickmacross Zone RoI							
Carrickmacross sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalk Zone RoI							
Aldi, Newry Road, Lisdoon, Dundalk	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalk Retail Park, Marshes Upper, Dundalk	£0.4	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalk Town Centre	£0.9	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0
Home Savers, Dundalk Retail Park, Inner Relief Road, Marshes Upper, Dundalk	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Dublin Road, Townparks, Dundalk	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalksub-total	£1.3	£1.3	£0.0	£0.0	£0.0	£0.0	£0.0
Drogheda Zone RoI							
Drogheda Retail Park, Donore Road, Rathmullan, Meath	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Drogheda Town Centre	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
Drogheda sub-total	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
Other ROI Outside Study Area							
Dublin City Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundrum Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other ROI Outside Study Area sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Others							
Other	£1.1	£0.2	£0.0	£0.4	£0.5	£0.0	£0.0
Abroad	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0
Total	£79.2	£9.5	£22.0	£16.1	£8.3	£14.9	£8.4

Table 15: Recreation Goods shopping patterns

Destination	Total Recreation (%)	Zone 1 Recreation (%)	Zone 2 Recreation (%)	Zone 3 Recreation (%)	Zone 4 Recreation (%)	Zone 5 Recreation (%)	Zone 6 Recreation (%)
Zone 1 NI							
Crossmaglen Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cullaville Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, Newry Road, Crossmaglen	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Dundalk Street, Newtownhamilton, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Main Street, Forkhill, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newtownhamilton Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nisa, Carrickasticken Road, Forkhill, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Concession Road, Cullaville, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Vivo (Murphy's), Silverbridge Road, Silverbridge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 1 sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 NI							
Bessbrook Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bravo Max, Corn Market, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Buttercrane Shopping Centre, Buttercrane Quay, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Camlough Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Warrenpoint Road, Greenbank, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter (Grant's), Hilltown Road, Mayobridge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Bettyshill Road, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Dublin Road, Cloughoge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Damolly Retail Park, Armagh Road, Newry	18.6%	28.1%	28.0%	20.5%	23.2%	0.0%	0.0%
Dunnes Stores, Old Creamery Shopping Centre, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Fiveways Shop and Service Station, Armagh Road, Newry	0.4%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%
Iceland, Monaghan Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Castle Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Cloghanramer Road, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mayobridge Village Centre	0.1%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Newry City Centre	36.2%	46.9%	63.0%	39.6%	22.4%	1.5%	0.0%
Nisa, Main Street, Camlough, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
O'Hare's Supermarket, Newry Road, Mayobridge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Old Creamery Retail Park, Monaghan Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others Zone 2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's, The Quays, Newry	0.5%	1.5%	0.0%	1.5%	0.0%	0.0%	0.0%
Spar, Buttercrane Shopping Centre, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Hill Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Downshire Road, Carneyhough Court, Newry	0.2%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%
The Good Food Shop, Hill Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Quays, Bridge Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Village Shop, The Village, Jonesborough, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 sub-total	56.1%	79.1%	92.5%	61.5%	45.5%	1.5%	0.0%
Zone 3 NI							
Annalong Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Newcastle Street, Kilkeel, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, (Grant's) Bog Road, Kilkeel	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Bog Road, Kilkeel, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, The Square, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kilkeel Town Centre	3.6%	0.0%	0.0%	14.6%	0.0%	0.0%	0.0%
Mace, Main Street, Rathfriland, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Milestone Service Station, Newry Street, Rathfriland, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nisa Fresh Food Centre, Church Street, Warrenpoint, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others Zone 3	1.1%	0.0%	0.0%	4.6%	0.0%	0.0%	0.0%
Spar, Greencastle Street, Kilkeel, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Vivo (Murdock's), Upper Dromore Road, Warrenpoint, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Warrenpoint Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 3 sub-total	4.7%	0.0%	0.0%	19.2%	0.0%	0.0%	0.0%
Zone 4 NI							
Castlewellan Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Railway Street, Newcastle	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Railway Street, Newcastle	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newcastle Town Centre	2.1%	0.0%	0.0%	1.5%	14.9%	1.5%	3.4%
Others Zone 4	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Castlewellan Road, Newcastle	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 4 sub-total	2.1%	0.0%	0.0%	1.5%	14.9%	1.5%	3.4%
Zone 5 NI							
Ardglass Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Ballydugan Retail Park, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ballyhornan Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Lisdoonan, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Market Street, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, The Ballymote Centre, Killough Road, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Crossgar Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Downpatrick Town Centre	10.0%	0.0%	0.0%	1.5%	4.3%	43.3%	9.0%
Killyleagh Village Centre	1.1%	0.0%	0.0%	0.0%	0.0%	5.2%	0.0%
Others Zone 5	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Downpatrick Road, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Killough Road, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 5 sub-total	11.1%	0.0%	0.0%	1.5%	4.3%	48.5%	9.0%

Zone 6 NI							
Ballynahinch Town Centre	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	3.9%
Iceland, High Street, Ballynahinch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Harmony Way, Ballynahinch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Morrisons Vivoxtra, Ballynahinch Road, Saintfield, Ballynahinch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Saintfield Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 6 sub-total	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	3.9%
District sub-total	74.2%	79.1%	92.5%	83.6%	64.7%	51.6%	16.4%
Zone 7 NI							
Ardkeen Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cloughy Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Portaferry Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Portavogie Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 7 sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other NI Outside Study Area							
Ards Shopping Centre, Circular Road, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Armagh Town Centre	0.8%	6.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Bridge Street, Portadown	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ballywalter Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Banbridge Town Centre	1.4%	0.0%	0.0%	1.5%	0.0%	5.2%	0.0%
Bangor Town Centre	0.5%	0.0%	0.0%	0.0%	0.0%	1.5%	2.8%
Belfast City Centre	9.3%	0.0%	0.0%	8.7%	18.7%	17.1%	40.8%
Belleek Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bloomfield Shopping Centre & Retail Park, South Circular Road, Bangor	0.3%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%
Boucher Retail Park, Boucher Road, Belfast	0.8%	1.3%	0.0%	0.0%	1.8%	1.5%	3.9%
Centra, Armagh Road, Keady	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Portadown Road, Deansbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Clandeboyce Retail Park, West Circular Road, Bangor	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, Lisburn Street, Hillsborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Ballygowan Road, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Scarva Street, Lough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Donaghadee Town Centre	0.3%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%
Dungannon Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, Scarva Street, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Forestside Shopping Centre, Upper Galwally, Belfast	5.8%	0.0%	0.0%	0.0%	8.7%	18.8%	24.9%
Hillsborough Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hollywood Exchange, Airport Road West, Belfast	0.5%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%
Hollywood Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Meadow Lane, Portadown	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Newry Street, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Keady Village Centre	0.2%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Kircubbin Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Moy Road, Armagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lisburn City Centre	1.0%	4.5%	0.0%	0.0%	2.2%	0.0%	5.6%
Markethill Village Centre	0.1%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Newtownards Town Centre	0.9%	0.0%	0.0%	0.0%	1.8%	2.8%	2.8%
Nisa Local, Main Street, Markethill, Armagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Main Street, Carrowdore, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Meeting Street, Dromore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Springhill Retail Park, Killeen Avenue, Bangor	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sprucefield Park, Hillsborough Road, Lisburn	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%
Supervalu, Banbridge Road, Dromore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Castle Street, Comber, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Bridgewater Retail Park, Banbridge	1.9%	0.0%	5.7%	0.0%	2.2%	0.0%	0.0%
Tesco Extra, Castlebawn Drive, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Outlet Bridgewater Park, Cascum Road, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other NI Outside Study Area sub-total	23.9%	15.2%	7.5%	11.4%	35.3%	48.4%	83.7%
Castleblayney Zone RoI							
Castleblayney Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Main Street, Black Island, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Monaghan Road, Moraghy, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Londis, Dublin Road, Onomy, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Glencarn Town Centre, Conabury, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Watter Supermarket, Dublin Road, Onomy, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Castleblayney sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carrickmacross Zone RoI							
Aldi, Riverside Road, Drummond Otra, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carrickmacross Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Ardee Road, Drummond Otra, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Market Square Shopping Centre, Drummond Etra, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carrickmacross sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Dundalk Zone Rol							
Aldi, Newry Road, Lisdoon, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carlingford Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carthage Supermarket, Clanbrassil Street, Townparks, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Clanbrassil Street, Townparks, Dundalk, Co. Louth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundalk Retail Park, Marshes Upper, Dundalk	0.5%	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundalk Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, Ard Easmuinn Road, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, Hoey's Lane, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Home Savers, Dundalk Retail Park, Inner Relief Road, Marshes Upper, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Castle Road, Townparks, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Avenue Road, Greenacres, Marshes Lower, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Carrickmacross Road, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Castletown Road, Moorland, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marshes Shopping Centre, Marshes Avenue, Marshes Lower, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Northlink Retail Park, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Dublin Road, Townparks, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Dundalk Shopping Centre, Stapleton Drive, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Metro, Longwalk Shopping Centre, The Long Walk, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundalksub-total	0.5%	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Drogheda Zone Rol							
Aldi, Slane Road, Mell, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ardee Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Ballsgrove Shoping Centre, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Boyne Centre, Bolton Square, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Drogheda Retail & Leisure Centre, Rathmullan Road, Rathmullan, Louth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Plattin Road, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Dublin Road, Wheaton Hall, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Drogheda Retail Park, Donore Road, Rathmullan, Meath	1.2%	0.0%	0.0%	5.0%	0.0%	0.0%	0.0%
Drogheda Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunleer Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, Scotch Hall Shopping Centre, Marsh Road, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, South Gate Shopping Centre, Colpe Cross, Grange Rath, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, West Street, Downtown Drogheda, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Euro 2, West Street, Downtown Drogheda, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, Bredin Street, East Drogheda, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Donore Road, Lagavooren, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Mell, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Londis (Top Shop), Marian Park, Crushrod Avenue, Yellowbatter, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
M1 Retail Park, Mell, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Duleek Street, Lagavooren, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Wheaton Hall, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
On The Run, The Court, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Scotch Hall Shopping Centre, Marsh Road, Lagavooren, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Donore Road, Matthew's Lane, Lagavooren, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Metro, West Street, Downtown Drogheda, Drogheda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Drogheda sub-total	1.2%	0.0%	0.0%	5.0%	0.0%	0.0%	0.0%
Other Rol Outside Study Area							
Dublin City Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundrum Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Monaghan Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Clones Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other ROI Outside Study Area sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others							
Other	0.2%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Abroad	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



Other NI Outside Study Area							
Armagh Town Centre	£0.5	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0
Asda, Bridge Street, Portadown	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Banbridge Town Centre	£0.7	£0.0	£0.0	£0.2	£0.0	£0.5	£0.0
Bangor Town Centre	£0.3	£0.0	£0.0	£0.0	£0.0	£0.2	£0.2
Belfast City Centre	£6.0	£0.0	£0.0	£1.0	£1.1	£1.7	£2.3
Bloomfield Shopping Centre & Retail Park, South Circular Road, Bangor	£0.2	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0
Boucher Retail Park, Boucher Road, Belfast	£0.6	£0.1	£0.0	£0.0	£0.1	£0.2	£0.2
Centra, Armagh Road, Keady	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Donaghadee Town Centre	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0
Dungannon Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Forestside Shopping Centre, Upper Galwally, Belfast	£3.8	£0.0	£0.0	£0.0	£0.5	£1.9	£1.4
Hollywood Exchange, Airport Road West, Belfast	£0.2	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
Keady Village Centre	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
Lisburn City Centre	£0.8	£0.3	£0.0	£0.0	£0.1	£0.0	£0.3
Markethill Village Centre	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
Newtownards Town Centre	£0.5	£0.0	£0.0	£0.0	£0.1	£0.3	£0.2
Springhill Retail Park, Killeen Avenue, Bangor	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sprucefield Park, Hillsborough Road, Lisburn	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Tesco Extra, Bridgewater Retail Park, Banbridge	£0.9	£0.0	£0.8	£0.0	£0.1	£0.0	£0.0
Tesco Extra, Castlebawn Drive, Newtownards	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
The Outlet Bridgewater Park, Cascum Road, Banbridge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other NI Outside Study Area sub-total	£14.9	£1.1	£1.0	£1.3	£2.0	£4.9	£4.6
Castleblayney Zone RoI							
Lidl, Monaghan Road, Moraghy, Castleblayney	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Castleblayney sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Carrickmacross Zone RoI							
Carrickmacross sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalk Zone RoI							
Aldi, Newry Road, Lisdoon, Dundalk	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalk Retail Park, Marshes Upper, Dundalk	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalk Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Home Savers, Dundalk Retail Park, Inner Relief Road, Marshes Upper, Dundalk	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Dublin Road, Townparks, Dundalk	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalksub-total	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0
Drogheda Zone RoI							
Drogheda Retail Park, Donore Road, Rathmullan, Meath	£0.6	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0
Drogheda Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Drogheda sub-total	£0.6	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0
Other ROI Outside Study Area							
Dublin City Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundrum Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other ROI Outside Study Area sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Others							
Other	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
Abroad	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Total	£53.3	£7.3	£13.3	£11.5	£5.6	£10.1	£5.5

Table 17: Chemist goods shopping patterns

Destination	Total Chemist (%)	Zone 1 Chemist (%)	Zone 2 Chemist (%)	Zone 3 Chemist (%)	Zone 4 Chemist (%)	Zone 5 Chemist (%)	Zone 6 Chemist (%)
Zone 1 NI							
Crossmaglen Town Centre	2.8%	15.0%	3.8%	0.0%	0.0%	0.0%	0.0%
Cullaville Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, Newry Road, Crossmaglen	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Dundalk Street, Newtownhamilton, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Main Street, Forkhill, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newtownhamilton Town Centre	0.3%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Nisa, Carrickasticken Road, Forkhill, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Concession Road, Cullaville, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Vivo (Murphy's), Silverbridge Road, Silverbridge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 1 sub-total	3.1%	17.3%	3.8%	0.0%	0.0%	0.0%	0.0%
Zone 2 NI							
Bessbrook Village Centre	0.3%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%
Bravo Max, Corn Market, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Buttercrane Shopping Centre, Buttercrane Quay, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Camlough Village Centre	1.2%	3.0%	3.5%	0.0%	0.0%	0.0%	0.0%
Centra, Warrenpoint Road, Greenbank, Newry	0.1%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%
Costcutter (Grant's), Hilltown Road, Mayobridge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Bettyshill Road, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Dublin Road, Cloughoge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Damolly Retail Park, Armagh Road, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, Old Creamery Shopping Centre, Newry	0.2%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%
Fiveways Shop and Service Station, Armagh Road, Newry	0.3%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%
Iceland, Monaghan Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Castle Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Cloghanramer Road, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mayobridge Village Centre	1.3%	0.0%	5.5%	0.0%	0.0%	0.0%	0.0%
Newry City Centre	24.9%	26.1%	70.5%	16.4%	6.0%	0.0%	0.0%
Nisa, Main Street, Camlough, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
O'Hare's Supermarket, Newry Road, Mayobridge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Old Creamery Retail Park, Monaghan Street, Newry	0.3%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%
Others Zone 2	0.3%	0.5%	0.9%	0.0%	0.0%	0.0%	0.0%
Sainsbury's, The Quays, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Buttercrane Shopping Centre, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Hill Street, Newry	0.3%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Downshire Road, Carneyhough Court, Newry	1.0%	1.4%	3.5%	0.0%	0.0%	0.0%	0.0%
The Good Food Shop, Hill Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Quays, Bridge Street, Newry	0.1%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%
The Village Shop, The Village, Jonesborough, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 sub-total	30.4%	31.0%	89.3%	17.7%	6.0%	0.0%	0.0%
Zone 3 NI							
Annalong Village Centre	1.6%	0.0%	0.0%	7.0%	0.0%	0.0%	0.0%
Asda, Newcastle Street, Kilkeel, Newry	0.5%	0.0%	0.0%	0.9%	2.7%	0.0%	0.0%
Costcutter, (Grant's) Bog Road, Kilkeel	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Bog Road, Kilkeel, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, The Square, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kilkeel Town Centre	10.1%	0.0%	0.0%	45.7%	0.0%	0.0%	0.0%
Mace, Main Street, Rathfriland, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Milestone Service Station, Newry Street, Rathfriland, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nisa Fresh Food Centre, Church Street, Warrenpoint, Newry	0.3%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%
Others Zone 3	1.0%	0.0%	1.1%	3.4%	0.0%	0.0%	0.0%
Spar, Greencastle Street, Kilkeel, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Vivo (Murdock's), Upper Dromore Road, Warrenpoint, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Warrenpoint Town Centre	3.3%	0.0%	0.0%	14.4%	0.0%	0.6%	0.0%
Zone 3 sub-total	16.8%	0.0%	1.1%	72.8%	2.7%	0.6%	0.0%
Zone 4 NI							
Castlewellan Town Centre	1.5%	0.0%	0.0%	0.0%	14.0%	0.0%	0.0%
Centra, Railway Street, Newcastle	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Railway Street, Newcastle	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newcastle Town Centre	6.3%	0.0%	0.0%	3.5%	47.5%	1.6%	0.0%
Others Zone 4	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Castlewellan Road, Newcastle	0.1%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%
Zone 4 sub-total	8.0%	0.0%	0.0%	3.5%	62.4%	1.6%	0.0%
Zone 5 NI							
Ardglass Village Centre	1.2%	0.0%	0.0%	0.0%	0.0%	6.2%	0.0%
Asda, Ballydugan Retail Park, Downpatrick	3.0%	0.0%	0.0%	0.0%	4.5%	11.0%	2.8%
Ballyhornan Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Lisdoonan, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Market Street, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, The Ballymote Centre, Killough Road, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Crossgar Village Centre	2.7%	0.0%	0.0%	0.0%	0.0%	13.4%	0.0%
Downpatrick Town Centre	8.2%	0.0%	0.0%	0.0%	7.7%	33.1%	7.4%
Killyleagh Village Centre	1.8%	0.0%	0.0%	0.0%	0.0%	8.9%	0.0%
Others Zone 5	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Downpatrick Road, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Killough Road, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 5 sub-total	16.8%	0.0%	0.0%	0.0%	12.2%	72.5%	10.2%

Zone 6 NI							
Ballynahinch Town Centre	5.7%	0.0%	0.0%	0.0%	2.9%	4.1%	46.3%
Iceland, High Street, Ballynahinch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Harmony Way, Ballynahinch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Morrisons Vivoxtra, Ballynahinch Road, Saintfield, Ballynahinch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Saintfield Village Centre	2.5%	0.0%	0.0%	0.0%	0.0%	2.7%	19.7%
Zone 6 sub-total	8.2%	0.0%	0.0%	0.0%	2.9%	6.8%	65.9%
District sub-total							
	83.2%	48.2%	94.1%	94.0%	86.1%	81.5%	76.1%
Zone 7 NI							
Ardkeen Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cloughy Village Centre	0.4%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%
Portaferry Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Portavogie Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 7 sub-total	0.4%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%
Other NI Outside Study Area							
Ards Shopping Centre, Circular Road, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Armagh Town Centre	2.2%	17.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Bridge Street, Portadown	0.1%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Ballywalter Village Centre	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%
Banbridge Town Centre	0.4%	0.0%	0.0%	0.8%	2.4%	0.0%	0.0%
Bangor Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Belfast City Centre	2.7%	0.0%	0.0%	1.7%	5.7%	4.8%	7.1%
Belleek Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bloomfield Shopping Centre & Retail Park, South Circular Road, Bangor	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Boucher Retail Park, Boucher Road, Belfast	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Armagh Road, Keady	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Portadown Road, Deansbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Clandeboyce Retail Park, West Circular Road, Bangor	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, Lisburn Street, Hillsborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Ballygowan Road, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Scarva Street, Lough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Donaghadee Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dungannon Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, Scarva Street, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Forestside Shopping Centre, Upper Galwally, Belfast	1.0%	0.0%	0.0%	0.0%	0.7%	2.7%	4.4%
Hillsborough Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hollywood Exchange, Airport Road West, Belfast	0.5%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%
Hollywood Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Meadow Lane, Portadown	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Newry Street, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Keady Village Centre	0.9%	7.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kircubbin Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Moy Road, Armagh	0.1%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Lisburn City Centre	1.8%	0.0%	0.0%	0.0%	1.4%	2.5%	11.6%
Markethill Village Centre	1.3%	10.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Newtownards Town Centre	0.3%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%
Nisa Local, Main Street, Markethill, Armagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Main Street, Carrowdore, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Meeting Street, Dromore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Springhill Retail Park, Killeen Avenue, Bangor	0.1%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%
Sprucefield Park, Hillsborough Road, Lisburn	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Banbridge Road, Dromore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Castle Street, Comber, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Bridgewater Retail Park, Banbridge	0.3%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Castlebawn Drive, Newtownards	0.2%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%
The Outlet Bridgewater Park, Cascum Road, Banbridge	0.3%	0.7%	0.0%	0.8%	0.0%	0.0%	0.0%
Other NI Outside Study Area sub-total	12.2%	37.5%	1.1%	3.4%	11.0%	14.7%	23.9%
Castleblayney Zone Rol							
Castleblayney Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Main Street, Black Island, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Monaghan Road, Moraghy, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Londis, Dublin Road, Onomy, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Glencarn Town Centre, Conabury, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Watter Supermarket, Dublin Road, Onomy, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Castleblayney sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carrickmacross Zone Rol							
Aldi, Riverside Road, Drummond Otra, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carrickmacross Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Ardee Road, Drummond Otra, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Market Square Shopping Centre, Drummond Etra, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carrickmacross sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundalk Zone Rol							
Aldi, Newry Road, Lisdoo, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carlingford Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carthage Supermarket, Clanbrassil Street, Townparks, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Clanbrassil Street, Townparks, Dundalk, Co. Louth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundalk Retail Park, Marshes Upper, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundalk Town Centre	0.9%	0.7%	3.5%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, Ard Easmuinn Road, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, Hoey's Lane, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Home Savers, Dundalk Retail Park, Inner Relief Road, Marshes Upper, Dundalk	0.3%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%
Lidl, Castle Road, Townparks, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Avenue Road, Greenacres, Marshes Lower, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Carrickmacross Road, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Castletown Road, Moorland, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marshes Shopping Centre, Marshes Avenue, Marshes Lower, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Northlink Retail Park, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Dublin Road, Townparks, Dundalk	0.3%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Dundalk Shopping Centre, Stapleton Drive, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Metro, Longwalk Shopping Centre, The Long Walk, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundalksub-total	1.5%	2.7%	4.8%	0.0%	0.0%	0.0%	0.0%



Table 18: Chemist goods expenditure

Destination	Total Chemist (£m)	Zone 1 Chemist (£m)	Zone 2 Chemist (£m)	Zone 3 Chemist (£m)	Zone 4 Chemist (£m)	Zone 5 Chemist (£m)	Zone 6 Chemist (£m)
Zone 1 NI							
Crossmaglen Town Centre	£0.8	£0.5	£0.2	£0.0	£0.0	£0.0	£0.0
Cullaville Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Newtownhamilton Town Centre	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 1 sub-total	£0.8	£0.6	£0.2	£0.0	£0.0	£0.0	£0.0
Zone 2 NI							
Bessbrook Village Centre	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
Buttercrane Shopping Centre, Buttercrane Quay, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Camlough Village Centre	£0.3	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0
Centra, Warrenpoint Road, Greenbank, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Damolly Retail Park, Armagh Road, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dunnes Stores, Old Creamery Shopping Centre, Newry	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
Fiveways Shop and Service Station, Armagh Road, Newry	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
Lidl, Castle Street, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Mace, Cloghanramer Road, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Mayobridge Village Centre	£0.4	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0
Newry City Centre	£6.6	£0.9	£4.7	£0.9	£0.2	£0.0	£0.0
Old Creamery Retail Park, Monaghan Street, Newry	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
Others Zone 2	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
Sainsbury's, The Quays, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Spar, Buttercrane Shopping Centre, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Supervalu, Hill Street, Newry	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Downshire Road, Carneyhough Court, Newry	£0.3	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
The Quays, Bridge Street, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 2 sub-total	£8.1	£1.1	£5.9	£1.0	£0.2	£0.0	£0.0
Zone 3 NI							
Annalong Village Centre	£0.4	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0
Asda, Newcastle Street, Kilkeel, Newry	£0.1	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0
Kilkeel Town Centre	£2.5	£0.0	£0.0	£2.5	£0.0	£0.0	£0.0
Nisa Fresh Food Centre, Church Street, Warrenpoint, Newry	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0
Others Zone 3	£0.3	£0.0	£0.1	£0.2	£0.0	£0.0	£0.0
Warrenpoint Town Centre	£0.8	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0
Zone 3 sub-total	£4.2	£0.0	£0.1	£4.0	£0.1	£0.0	£0.0
Zone 4 NI							
Castlewellan Town Centre	£0.4	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0
Newcastle Town Centre	£1.6	£0.0	£0.0	£0.2	£1.3	£0.1	£0.0
Others Zone 4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Castlewellan Road, Newcastle	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 4 sub-total	£2.0	£0.0	£0.0	£0.2	£1.7	£0.1	£0.0
Zone 5 NI							
Ardglass Village Centre	£0.3	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0
Asda, Ballydugan Retail Park, Downpatrick	£0.8	£0.0	£0.0	£0.0	£0.1	£0.6	£0.1
Costcutter, Market Street, Downpatrick	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Crossgar Village Centre	£0.7	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0
Downpatrick Town Centre	£2.1	£0.0	£0.0	£0.0	£0.2	£1.7	£0.2
Killyleagh Village Centre	£0.4	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0
Zone 5 sub-total	£4.3	£0.0	£0.0	£0.0	£0.3	£3.6	£0.3
Zone 6 NI							
Ballynahinch Town Centre	£1.6	£0.0	£0.0	£0.0	£0.1	£0.2	£1.3
Saintfield Village Centre	£0.7	£0.0	£0.0	£0.0	£0.0	£0.1	£0.5
Zone 6 sub-total	£2.3	£0.0	£0.0	£0.0	£0.1	£0.3	£1.8
District sub-total	£21.6	£1.7	£6.2	£5.1	£2.4	£4.1	£2.1
Zone 7 NI							
Cloughy Village Centre	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
Zone 7 sub-total	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0

Other NI Outside Study Area							
Armagh Town Centre	£0.6	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0
Asda, Bridge Street, Portadown	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Banbridge Town Centre	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0
Bangor Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Belfast City Centre	£0.7	£0.0	£0.0	£0.1	£0.2	£0.2	£0.2
Bloomfield Shopping Centre & Retail Park, South Circular Road, Bangor	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Boucher Retail Park, Boucher Road, Belfast	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Centra, Armagh Road, Keady	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Donaghadee Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dungannon Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Forestside Shopping Centre, Upper Galwally, Belfast	£0.3	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1
Hollywood Exchange, Airport Road West, Belfast	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
Keady Village Centre	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0
Lisburn City Centre	£0.5	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3
Markethill Village Centre	£0.4	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0
Newtownards Town Centre	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
Springhill Retail Park, Killeen Avenue, Bangor	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sprucefield Park, Hillsborough Road, Lisburn	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Bridgewater Retail Park, Banbridge	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Castlebawn Drive, Newtownards	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
The Outlet Bridgewater Park, Cascum Road, Banbridge	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other NI Outside Study Area sub-total	£3.3	£1.3	£0.1	£0.2	£0.3	£0.7	£0.7
Castleblayney Zone RoI							
Lidl, Monaghan Road, Moraghy, Castleblayney	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Castleblayney sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Carrickmacross Zone RoI							
Carrickmacross sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalk Zone RoI							
Aldi, Newry Road, Lisdoo, Dundalk	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalk Retail Park, Marshes Upper, Dundalk	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalk Town Centre	£0.3	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
Home Savers, Dundalk Retail Park, Inner Relief Road, Marshes Upper, Dundalk	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Dublin Road, Townparks, Dundalk	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalksub-total	£0.4	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0
Drogheda Zone RoI							
Drogheda Retail Park, Donore Road, Rathmullan, Meath	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Drogheda Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Drogheda sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other ROI Outside Study Area							
Dublin City Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundrum Village Centre	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0
Other ROI Outside Study Area sub-total	£0.2	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0
Others							
Other	£0.5	£0.4	£0.0	£0.1	£0.0	£0.0	£0.0
Abroad	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Total	£26.1	£3.4	£6.6	£5.5	£2.8	£5.0	£2.8

Table 19: Electrical goods shopping patterns

Destination	Total Electrical (%)	Zone 1 Electrical (%)	Zone 2 Electrical (%)	Zone 3 Electrical (%)	Zone 4 Electrical (%)	Zone 5 Electrical (%)	Zone 6 Electrical (%)
Zone 1 NI							
Crossmaglen Town Centre	2.7%	9.3%	4.9%	0.0%	0.0%	0.0%	0.0%
Cullaville Village Centre	1.1%	8.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, Newry Road, Crossmaglen	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Dundalk Street, Newtownhamilton, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Main Street, Forkhill, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newtownhamilton Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nisa, Carrickasticken Road, Forkhill, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Concession Road, Cullaville, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Vivo (Murphy's), Silverbridge Road, Silverbridge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 1 sub-total	3.8%	17.4%	4.9%	0.0%	0.0%	0.0%	0.0%
Zone 2 NI							
Bessbrook Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bravo Max, Corn Market, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Buttercrane Shopping Centre, Buttercrane Quay, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Camlough Village Centre	0.4%	0.6%	0.9%	0.0%	0.0%	0.0%	0.0%
Centra, Warrenpoint Road, Greenbank, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter (Grant's), Hilltown Road, Mayobridge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Bettyshill Road, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Dublin Road, Cloughoge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Damolly Retail Park, Armagh Road, Newry	16.9%	16.0%	33.8%	17.8%	9.0%	1.4%	0.0%
Dunnes Stores, Old Creamery Shopping Centre, Newry	0.1%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Fiveways Shop and Service Station, Armagh Road, Newry	0.1%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%
Iceland, Monaghan Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Castle Street, Newry	0.3%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%
Mace, Cloghanramer Road, Newry	1.1%	0.0%	3.8%	0.0%	0.0%	0.0%	0.0%
Mayobridge Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newry City Centre	22.2%	24.1%	44.1%	27.0%	5.0%	0.0%	0.0%
Nisa, Main Street, Camlough, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
O'Hare's Supermarket, Newry Road, Mayobridge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Old Creamery Retail Park, Monaghan Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others Zone 2	0.8%	0.0%	2.2%	0.0%	0.8%	0.0%	0.0%
Sainsbury's, The Quays, Newry	0.1%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Buttercrane Shopping Centre, Newry	0.3%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Hill Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Downshire Road, Carneyhough Court, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Good Food Shop, Hill Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Quays, Bridge Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Village Shop, The Village, Jonesborough, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 sub-total	42.3%	44.9%	85.8%	44.8%	15.8%	1.4%	0.0%
Zone 3 NI							
Annalong Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Newcastle Street, Kilkeel, Newry	0.4%	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%
Costcutter, (Grant's) Bog Road, Kilkeel	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Bog Road, Kilkeel, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, The Square, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kilkeel Town Centre	8.3%	0.0%	0.0%	41.8%	3.6%	0.0%	0.0%
Mace, Main Street, Rathfriland, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Milestone Service Station, Newry Street, Rathfriland, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nisa Fresh Food Centre, Church Street, Warrenpoint, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others Zone 3	0.3%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%
Spar, Greencastle Street, Kilkeel, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Vivo (Murdock's), Upper Dromore Road, Warrenpoint, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Warrenpoint Town Centre	0.2%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%
Zone 3 sub-total	9.2%	0.0%	1.1%	43.0%	6.6%	0.0%	0.0%
Zone 4 NI							
Castlewellan Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Railway Street, Newcastle	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Railway Street, Newcastle	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newcastle Town Centre	5.5%	0.0%	0.0%	2.3%	38.3%	2.4%	0.0%
Others Zone 4	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Castlewellan Road, Newcastle	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 4 sub-total	5.5%	0.0%	0.0%	2.3%	38.3%	2.4%	0.0%
Zone 5 NI							
Ardglass Village Centre	0.2%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%
Asda, Ballydugan Retail Park, Downpatrick	0.4%	0.0%	0.0%	0.0%	0.8%	1.0%	1.3%
Ballyhornan Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Lisdoonan, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Market Street, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, The Ballymote Centre, Killough Road, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Crossgar Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Downpatrick Town Centre	9.0%	0.0%	0.0%	3.8%	9.0%	41.1%	5.1%
Killyleagh Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others Zone 5	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Downpatrick Road, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Killough Road, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 5 sub-total	9.5%	0.0%	0.0%	3.8%	9.8%	43.0%	6.4%
Zone 6 NI							
Ballynahinch Town Centre	7.3%	0.0%	0.0%	0.0%	7.2%	17.5%	38.7%
Iceland, High Street, Ballynahinch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Harmony Way, Ballynahinch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Morrisons Vivoxtra, Ballynahinch Road, Saintfield, Ballynahinch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Saintfield Village Centre	1.1%	0.0%	0.0%	0.0%	0.0%	1.2%	9.3%
Zone 6 sub-total	8.4%	0.0%	0.0%	0.0%	7.2%	18.7%	48.0%
District sub-total	78.7%	62.3%	91.8%	93.9%	77.6%	65.5%	54.4%

Zone 7 NI							
Ardkeen Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cloughy Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Portaferry Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Portavogie Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 7 sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other NI Outside Study Area							
Ards Shopping Centre, Circular Road, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Armagh Town Centre	1.8%	13.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Bridge Street, Portadown	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ballywalter Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Banbridge Town Centre	0.2%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%
Bangor Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Belfast City Centre	4.0%	2.5%	1.3%	0.0%	8.9%	7.3%	11.1%
Belleek Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bloomfield Shopping Centre & Retail Park, South Circular Road, Bangor	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Boucher Retail Park, Boucher Road, Belfast	0.1%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%
Centra, Armagh Road, Keady	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Portadown Road, Deansbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Clandeboyce Retail Park, West Circular Road, Bangor	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, Lisburn Street, Hillsborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Ballygowan Road, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Scarva Street, Lough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Donaghadee Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dungannon Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, Scarva Street, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Forestside Shopping Centre, Upper Galwally, Belfast	4.6%	0.0%	0.0%	3.8%	0.0%	18.2%	9.7%
Hillsborough Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hollywood Exchange, Airport Road West, Belfast	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hollywood Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Meadow Lane, Portadown	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Newry Street, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Keady Village Centre	0.6%	4.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Kircubbin Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Moy Road, Armagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lisburn City Centre	2.3%	0.0%	1.1%	1.2%	4.7%	0.0%	12.2%
Markethill Village Centre	3.1%	11.2%	4.7%	0.0%	1.7%	0.0%	0.0%
Newtownards Town Centre	0.2%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%
Nisa Local, Main Street, Markethill, Armagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Main Street, Carrowdore, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Meeting Street, Dromore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Springhill Retail Park, Killeen Avenue, Bangor	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sprucefield Park, Hillsborough Road, Lisburn	3.0%	0.7%	1.1%	1.2%	1.9%	6.7%	10.6%
Supervalu, Banbridge Road, Dromore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Castle Street, Comber, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Bridgewater Retail Park, Banbridge	0.1%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%
Tesco Extra, Castlebawn Drive, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Outlet Bridgewater Park, Cascum Road, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other NI Outside Study Area sub-total	20.0%	32.5%	8.2%	6.1%	20.7%	33.2%	43.7%
Castleblayney Zone Rol							
Castleblayney Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Main Street, Black Island, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Monaghan Road, Moraghy, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Londis, Dublin Road, Onomy, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Glencarn Town Centre, Conabury, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Watter Supermarket, Dublin Road, Onomy, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Castleblayney sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carrickmacross Zone Rol							
Aldi, Riverside Road, Drummond Otra, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carrickmacross Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Ardee Road, Drummond Otra, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Market Square Shopping Centre, Drummond Etra, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carrickmacross sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundalk Zone Rol							
Aldi, Newry Road, Lisdoo, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carlingford Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carthage Supermarket, Clanbrassil Street, Townparks, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Clanbrassil Street, Townparks, Dundalk, Co. Louth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundalk Retail Park, Marshes Upper, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundalk Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, Ard Easmuinn Road, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, Hoey's Lane, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Home Savers, Dundalk Retail Park, Inner Relief Road, Marshes Upper, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Castle Road, Townparks, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Avenue Road, Greenacres, Marshes Lower, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Carrickmacross Road, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Castletown Road, Moorland, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marshes Shopping Centre, Marshes Avenue, Marshes Lower, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Northlink Retail Park, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Dublin Road, Townparks, Dundalk	0.3%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Dundalk Shopping Centre, Stapleton Drive, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Metro, Longwalk Shopping Centre, The Long Walk, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundalksub-total	0.3%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%



Table 20: Electrical goods expenditure

Destination	Total Electrical (£m)	Zone 1 Electrical (£m)	Zone 2 Electrical (£m)	Zone 3 Electrical (£m)	Zone 4 Electrical (£m)	Zone 5 Electrical (£m)	Zone 6 Electrical (£m)
<b>Zone 1 NI</b>							
Crossmaglen Town Centre	£1.1	£0.5	£0.6	£0.0	£0.0	£0.0	£0.0
Cullaville Village Centre	£0.4	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0
Newtownhamilton Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<b>Zone 1 sub-total</b>	<b>£1.5</b>	<b>£0.9</b>	<b>£0.6</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>
<b>Zone 2 NI</b>							
Bessbrook Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Buttercrane Shopping Centre, Buttercrane Quay, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Camlough Village Centre	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
Centra, Warrenpoint Road, Greenbank, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Damolly Retail Park, Armagh Road, Newry	£7.0	£0.8	£4.0	£1.7	£0.4	£0.1	£0.0
Dunnes Stores, Old Creamery Shopping Centre, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Fiveways Shop and Service Station, Armagh Road, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Lidl, Castle Street, Newry	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
Mace, Cloghanramer Road, Newry	£0.5	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0
Mayobridge Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Newry City Centre	£9.2	£1.2	£5.2	£2.5	£0.2	£0.0	£0.0
Old Creamery Retail Park, Monaghan Street, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Others Zone 2	£0.3	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0
Sainsbury's, The Quays, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Spar, Buttercrane Shopping Centre, Newry	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
Supervalu, Hill Street, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Downshire Road, Carneyhough Court, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
The Quays, Bridge Street, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<b>Zone 2 sub-total</b>	<b>£17.6</b>	<b>£2.3</b>	<b>£10.2</b>	<b>£4.2</b>	<b>£0.8</b>	<b>£0.1</b>	<b>£0.0</b>
<b>Zone 3 NI</b>							
Annalong Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Asda, Newcastle Street, Kilkeel	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0
Kilkeel Town Centre	£4.1	£0.0	£0.0	£3.9	£0.2	£0.0	£0.0
Mace, Main Street, Rathfriland	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Others Zone 3	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
Warrenpoint Town Centre	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0
<b>Zone 3 sub-total</b>	<b>£4.5</b>	<b>£0.0</b>	<b>£0.1</b>	<b>£4.0</b>	<b>£0.3</b>	<b>£0.0</b>	<b>£0.0</b>
<b>Zone 4 NI</b>							
Castlewellan Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Newcastle Town Centre	£2.3	£0.0	£0.0	£0.2	£1.9	£0.2	£0.0
Others Zone 4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Castlewellan Road, Newcastle	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<b>Zone 4 sub-total</b>	<b>£2.3</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.2</b>	<b>£1.9</b>	<b>£0.2</b>	<b>£0.0</b>
<b>Zone 5 NI</b>							
Ardglass Village Centre	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
Asda, Ballydugan Retail Park, Downpatrick	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1
Costcutter, Market Street, Downpatrick	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Crossgar Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Downpatrick Town Centre	£4.5	£0.0	£0.0	£0.4	£0.4	£3.5	£0.2
Killyleagh Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<b>Zone 5 sub-total</b>	<b>£4.8</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.4</b>	<b>£0.5</b>	<b>£3.6</b>	<b>£0.3</b>
<b>Zone 6 NI</b>							
Ballynahinch Town Centre	£3.7	£0.0	£0.0	£0.0	£0.4	£1.5	£1.8
Saintfield Village Centre	£0.5	£0.0	£0.0	£0.0	£0.0	£0.1	£0.4
<b>Zone 6 sub-total</b>	<b>£4.2</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.4</b>	<b>£1.6</b>	<b>£2.3</b>
<b>District sub-total</b>	<b>£34.8</b>	<b>£3.2</b>	<b>£10.9</b>	<b>£8.8</b>	<b>£3.9</b>	<b>£5.5</b>	<b>£2.6</b>

Zone 7 NI							
Cloughy Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 7 sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other NI Outside Study Area							
Armagh Town Centre	£0.7	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0
Asda, Bridge Street, Portadown	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Banbridge Town Centre	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0
Bangor Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Belfast City Centre	£1.9	£0.1	£0.2	£0.0	£0.4	£0.6	£0.5
Bloomfield Shopping Centre & Retail Park, South Circular Road, Bangor	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Boucher Retail Park, Boucher Road, Belfast	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Centra, Armagh Road, Keady	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Donaghadee Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dungannon Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Forestside Shopping Centre, Upper Galwally, Belfast	£2.3	£0.0	£0.0	£0.4	£0.0	£1.5	£0.5
Hollywood Exchange, Airport Road West, Belfast	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Keady Village Centre	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0
Lisburn City Centre	£1.1	£0.0	£0.1	£0.1	£0.2	£0.0	£0.6
Markethill Village Centre	£1.2	£0.6	£0.6	£0.0	£0.1	£0.0	£0.0
Newtownards Town Centre	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
Springhill Retail Park, Killeen Avenue, Bangor	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sprucefield Park, Hillsborough Road, Lisburn	£1.4	£0.0	£0.1	£0.1	£0.1	£0.6	£0.5
Tesco Extra, Bridgewater Retail Park, Banbridge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Castlebawn Drive, Newtownards	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
The Outlet Bridgewater Park, Cascum Road, Banbridge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other NI Outside Study Area sub-total	£9.1	£1.7	£1.0	£0.6	£1.0	£2.8	£2.1
Castleblayney Zone RoI							
Lidl, Monaghan Road, Moraghy, Castleblayney	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Castleblayney sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Carrickmacross Zone RoI							
Carrickmacross sub-total							
Dundalk Zone RoI							
Aldi, Newry Road, Lisdoon, Dundalk	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalk Retail Park, Marshes Upper, Dundalk	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalk Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Home Savers, Dundalk Retail Park, Inner Relief Road, Marshes Upper, Dundalk	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Dublin Road, Townparks, Dundalk	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalksub-total	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
Drogheda Zone RoI							
Drogheda Retail Park, Donore Road, Rathmullan, Meath	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Drogheda Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Drogheda sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other RoI Outside Study Area							
Dublin City Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundrum Village Centre	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
Other ROI Outside Study Area sub-total	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
Others							
Other	£0.3	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1
Abroad	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Total	£44.5	£5.1	£11.9	£9.3	£5.0	£8.5	£4.7

Table 21: DIY & Gardening shopping patterns

Destination	Total DIY (%)	Zone 1 DIY (%)	Zone 2 DIY (%)	Zone 3 DIY (%)	Zone 4 DIY (%)	Zone 5 DIY (%)	Zone 6 DIY (%)
Zone 1 NI							
Crossmaglen Town Centre	0.7%	6.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cullaville Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, Newry Road, Crossmaglen	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Dundalk Street, Newtownhamilton, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Main Street, Forkhill, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newtownhamilton Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nisa, Carrickasticken Road, Forkhill, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Concession Road, Cullaville, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Vivo (Murphy's), Silverbridge Road, Silverbridge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 1 sub-total	0.7%	6.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 NI							
Bessbrook Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bravo Max, Corn Market, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Buttercrane Shopping Centre, Buttercrane Quay, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Camlough Village Centre	1.0%	0.0%	3.5%	0.0%	0.0%	0.0%	0.0%
Centra, Warrenpoint Road, Greenbank, Newry	0.4%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%
Costcutter (Grant's), Hilltown Road, Mayobridge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Bettyshill Road, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Dublin Road, Cloughoge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Damolly Retail Park, Armagh Road, Newry	25.7%	27.6%	49.4%	25.1%	20.2%	2.1%	0.9%
Dunnes Stores, Old Creamery Shopping Centre, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Fiveways Shop and Service Station, Armagh Road, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Monaghan Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Castle Street, Newry	0.3%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%
Mace, Cloghanramer Road, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mayobridge Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newry City Centre	18.8%	15.5%	38.9%	21.0%	3.5%	3.6%	0.0%
Nisa, Main Street, Camlough, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
O'Hare's Supermarket, Newry Road, Mayobridge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Old Creamery Retail Park, Monaghan Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others Zone 2	1.5%	7.0%	2.2%	0.0%	0.0%	0.0%	0.0%
Sainsbury's, The Quays, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Buttercrane Shopping Centre, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Hill Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Downshire Road, Carneyhough Court, Newry	0.1%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%
The Good Food Shop, Hill Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Quays, Bridge Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Village Shop, The Village, Jonesborough, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 sub-total	47.8%	50.9%	96.2%	46.1%	23.8%	5.7%	0.9%
Zone 3 NI							
Annalong Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Newcastle Street, Kilkeel, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, (Grant's) Bog Road, Kilkeel	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Bog Road, Kilkeel, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, The Square, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kilkeel Town Centre	7.9%	0.0%	0.0%	37.8%	0.0%	0.0%	0.0%
Mace, Main Street, Rathfriland, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Milestone Service Station, Newry Street, Rathfriland, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nisa Fresh Food Centre, Church Street, Warrenpoint, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others Zone 3	1.4%	0.0%	0.0%	6.6%	0.0%	0.0%	0.0%
Spar, Greencastle Street, Kilkeel, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Vivo (Murdock's), Upper Dromore Road, Warrenpoint, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Warrenpoint Town Centre	1.5%	0.0%	0.0%	7.3%	0.0%	0.0%	0.0%
Zone 3 sub-total	10.8%	0.0%	0.0%	51.7%	0.0%	0.0%	0.0%
Zone 4 NI							
Castlewellan Town Centre	2.0%	0.0%	0.0%	1.2%	18.0%	0.0%	0.0%
Centra, Railway Street, Newcastle	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Railway Street, Newcastle	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newcastle Town Centre	2.0%	0.0%	0.0%	0.0%	16.8%	2.1%	0.0%
Others Zone 4	0.4%	0.0%	0.0%	0.0%	3.6%	0.0%	0.0%
Tesco Superstore, Castlewellan Road, Newcastle	0.1%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%
Zone 4 sub-total	4.5%	0.0%	0.0%	1.2%	39.3%	2.1%	0.0%
Zone 5 NI							
Ardglass Village Centre	0.2%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%
Asda, Ballydugan Retail Park, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ballyhornan Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Lisdoonan, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Market Street, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, The Ballymote Centre, Killough Road, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Crossgar Village Centre	0.3%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%
Downpatrick Town Centre	7.1%	0.0%	0.0%	0.0%	4.3%	34.7%	5.1%
Killyleagh Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others Zone 5	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
Supervalu, Downpatrick Road, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Killough Road, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 5 sub-total	7.7%	0.0%	0.0%	0.0%	4.3%	37.5%	6.3%
Zone 6 NI							
Ballynahinch Town Centre	5.1%	0.0%	0.0%	0.0%	0.0%	7.8%	39.7%
Iceland, High Street, Ballynahinch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Harmony Way, Ballynahinch	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%
Morrisons Vivoxtra, Ballynahinch Road, Saintfield, Ballynahinch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Saintfield Village Centre	2.1%	0.0%	0.0%	0.0%	0.0%	2.1%	18.3%
Zone 6 sub-total	7.3%	0.0%	0.0%	0.0%	0.0%	9.8%	59.0%
District sub-total	79.0%	57.0%	96.2%	99.0%	67.4%	55.2%	66.2%

Zone 7 NI							
Ardkeen Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cloughy Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Portaferry Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Portavogie Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Zone 7 sub-total</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
Other NI Outside Study Area							
Ards Shopping Centre, Circular Road, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Armagh Town Centre	2.9%	23.3%	0.0%	0.0%	0.9%	0.0%	0.0%
Asda, Bridge Street, Portadown	0.1%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Ballywalter Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Banbridge Town Centre	0.5%	0.0%	0.0%	0.0%	0.9%	0.0%	3.8%
Bangor Town Centre	0.2%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%
Belfast City Centre	3.9%	0.0%	0.0%	0.0%	5.9%	14.8%	6.4%
Belleek Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bloomfield Shopping Centre & Retail Park, South Circular Road, Bangor	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Boucher Retail Park, Boucher Road, Belfast	1.3%	0.0%	0.0%	0.0%	0.0%	6.3%	2.2%
Centra, Armagh Road, Keady	0.3%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Portadown Road, Deansbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Clandeboyce Retail Park, West Circular Road, Bangor	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, Lisburn Street, Hillsborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Ballygowan Road, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Scarva Street, Lough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Donaghadee Town Centre	0.3%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%
Dungannon Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, Scarva Street, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Forestside Shopping Centre, Upper Galwally, Belfast	0.6%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%
Hillsborough Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hollywood Exchange, Airport Road West, Belfast	1.6%	0.0%	0.0%	0.0%	7.7%	4.4%	0.0%
Hollywood Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Meadow Lane, Portadown	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Newry Street, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Keady Village Centre	0.4%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Kircubbin Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Moy Road, Armagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lisburn City Centre	2.0%	0.0%	0.0%	0.0%	5.6%	1.9%	12.3%
Markethill Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newtownards Town Centre	0.2%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%
Nisa Local, Main Street, Markethill, Armagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Main Street, Carrowdore, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Meeting Street, Dromore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Springhill Retail Park, Killeen Avenue, Bangor	0.1%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%
Sprucefield Park, Hillsborough Road, Lisburn	2.1%	0.0%	0.0%	0.0%	1.1%	7.4%	6.8%
Supervalu, Banbridge Road, Dromore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Castle Street, Comber, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Bridgewater Retail Park, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Castlebawn Drive, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Outlet Bridgewater Park, Cascum Road, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Other NI Outside Study Area sub-total</b>	<b>16.5%</b>	<b>30.2%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>23.1%</b>	<b>41.9%</b>	<b>31.6%</b>
Castleblayney Zone Rol							
Castleblayney Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Main Street, Black Island, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Monaghan Road, Moraghy, Castleblayney	1.1%	0.0%	3.8%	0.0%	0.0%	0.0%	0.0%
Londis, Dublin Road, Onomy, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Glencarn Town Centre, Conabury, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Watter Supermarket, Dublin Road, Onomy, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Castleblayney sub-total</b>	<b>1.1%</b>	<b>0.0%</b>	<b>3.8%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
Carrickmacross Zone Rol							
Aldi, Riverside Road, Drummond Otra, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carrickmacross Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Ardee Road, Drummond Otra, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Market Square Shopping Centre, Drummond Etra, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Carrickmacross sub-total</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
Dundalk Zone Rol							
Aldi, Newry Road, Lisdoon, Dundalk	0.3%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Carlingford Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carthage Supermarket, Clanbrassil Street, Townparks, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Clanbrassil Street, Townparks, Dundalk, Co. Louth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundalk Retail Park, Marshes Upper, Dundalk	0.7%	6.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundalk Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, Ard Easmuinn Road, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, Hoey's Lane, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Home Savers, Dundalk Retail Park, Inner Relief Road, Marshes Upper, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Castle Road, Townparks, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Avenue Road, Greenacres, Marshes Lower, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Carrickmacross Road, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Castletown Road, Moorland, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marshes Shopping Centre, Marshes Avenue, Marshes Lower, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Northlink Retail Park, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Dublin Road, Townparks, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Dundalk Shopping Centre, Stapleton Drive, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Metro, Longwalk Shopping Centre, The Long Walk, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Dundalksub-total</b>	<b>1.1%</b>	<b>8.6%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>



Table 22: DIY &amp; Gardening expenditure

Destination	Total DIY (£m)	Zone 1 DIY (£m)	Zone 2 DIY (£m)	Zone 3 DIY (£m)	Zone 4 DIY (£m)	Zone 5 DIY (£m)	Zone 6 DIY (£m)
Zone 1 NI							
Crossmaglen Town Centre	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0
Cullaville Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Newtownhamilton Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 1 sub-total	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 2 NI							
Bessbrook Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Buttercrane Shopping Centre, Buttercrane Quay, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Camlough Village Centre	£0.3	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0
Centra, Warrenpoint Road, Greenbank, Newry	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
Damolly Retail Park, Armagh Road, Newry	£7.6	£1.2	£4.0	£1.6	£0.7	£0.1	£0.0
Dunnes Stores, Old Creamery Shopping Centre, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Fiveways Shop and Service Station, Armagh Road, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Lidl, Castle Street, Newry	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
Mace, Cloghanramer Road, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Mayobridge Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Newry City Centre	£5.5	£0.7	£3.1	£1.4	£0.1	£0.2	£0.0
Old Creamery Retail Park, Monaghan Street, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Others Zone 2	£0.5	£0.3	£0.2	£0.0	£0.0	£0.0	£0.0
Sainsbury's, The Quays, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Spar, Buttercrane Shopping Centre, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Supervalu, Hill Street, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Downshire Road, Carneyhough Court, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
The Quays, Bridge Street, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 2 sub-total	£14.0	£2.2	£7.7	£3.0	£0.8	£0.3	£0.0
Zone 3 NI							
Annalong Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Asda, Newcastle Street, Kilkeel, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Kilkeel Town Centre	£2.4	£0.0	£0.0	£2.4	£0.0	£0.0	£0.0
Nisa Fresh Food Centre, Church Street, Warrenpoint, Newry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Others Zone 3	£0.4	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0
Warrenpoint Town Centre	£0.5	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0
Zone 3 sub-total	£3.3	£0.0	£0.0	£3.3	£0.0	£0.0	£0.0
Zone 4 NI							
Castlewellan Town Centre	£0.7	£0.0	£0.0	£0.1	£0.6	£0.0	£0.0
Newcastle Town Centre	£0.7	£0.0	£0.0	£0.0	£0.6	£0.1	£0.0
Others Zone 4	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0
Tesco Superstore, Castlewellan Road, Newcastle	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 4 sub-total	£1.5	£0.0	£0.0	£0.1	£1.3	£0.1	£0.0
Zone 5 NI							
Ardglass Village Centre	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
Asda, Ballydugan Retail Park, Downpatrick	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Costcutter, Market Street, Downpatrick	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Crossgar Village Centre	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
Downpatrick Town Centre	£2.4	£0.0	£0.0	£0.0	£0.1	£2.1	£0.2
Killyleagh Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 5 sub-total	£2.6	£0.0	£0.0	£0.0	£0.1	£2.3	£0.2
Zone 6 NI							
Ballynahinch Town Centre	£1.8	£0.0	£0.0	£0.0	£0.0	£0.5	£1.4
Saintfield Village Centre	£0.8	£0.0	£0.0	£0.0	£0.0	£0.1	£0.6
Zone 6 sub-total	£2.6	£0.0	£0.0	£0.0	£0.0	£0.6	£2.0
District sub-total	£24.4	£2.4	£7.7	£6.4	£2.2	£3.4	£2.3

Zone 7 NI							
Cloughy Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 7 sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other NI Outside Study Area							
Armagh Town Centre	£1.0	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0
Asda, Bridge Street, Portadown	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Banbridge Town Centre	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Bangor Town Centre	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
Belfast City Centre	£1.3	£0.0	£0.0	£0.0	£0.2	£0.9	£0.2
Bloomfield Shopping Centre & Retail Park, South Circular Road, Bangor	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Boucher Retail Park, Boucher Road, Belfast	£0.5	£0.0	£0.0	£0.0	£0.0	£0.4	£0.1
Centra, Armagh Road, Keady	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
Donaghadee Town Centre	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
Dungannon Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Forestside Shopping Centre, Upper Galwally, Belfast	£0.2	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0
Hollywood Exchange, Airport Road West, Belfast	£0.5	£0.0	£0.0	£0.0	£0.3	£0.3	£0.0
Keady Village Centre	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
Lisburn City Centre	£0.7	£0.0	£0.0	£0.0	£0.2	£0.1	£0.4
Markethill Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Newtownards Town Centre	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
Springhill Retail Park, Killeen Avenue, Bangor	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sprucefield Park, Hillsborough Road, Lisburn	£0.7	£0.0	£0.0	£0.0	£0.0	£0.4	£0.2
Tesco Extra, Bridgewater Retail Park, Banbridge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Castlebawn Drive, Newtownards	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
The Outlet Bridgewater Park, Cascum Road, Banbridge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other NI Outside Study Area sub-total	£5.7	£1.3	£0.0	£0.0	£0.8	£2.5	£1.1
Castleblayney Zone RoI							
Lidl, Monaghan Road, Moraghy, Castleblayney	£0.3	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0
Castleblayney sub-total	£0.3	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0
Carrickmacross Zone RoI							
Carrickmacross sub-total							
Dundalk Zone RoI							
Aldi, Newry Road, Lisdoon, Dundalk	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalk Retail Park, Marshes Upper, Dundalk	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalk Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Home Savers, Dundalk Retail Park, Inner Relief Road, Marshes Upper, Dundalk	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Dublin Road, Townparks, Dundalk	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalksub-total	£0.4	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0
Drogheda Zone RoI							
Drogheda Retail Park, Donore Road, Rathmullan, Meath	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Drogheda Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Drogheda sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other ROI Outside Study Area							
Dublin City Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundrum Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other ROI Outside Study Area sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Others							
Other	£0.8	£0.2	£0.0	£0.1	£0.3	£0.2	£0.1
Abroad	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Total	£31.5	£4.2	£8.0	£6.5	£3.3	£6.1	£3.4

Table 23: Furniture shopping patterns

Destination	Total Furniture (%)	Zone 1 Furniture (%)	Zone 2 Furniture (%)	Zone 3 Furniture (%)	Zone 4 Furniture (%)	Zone 5 Furniture (%)	Zone 6 Furniture (%)
Zone 1 NI							
Crossmaglen Town Centre	0.1%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Cullaville Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, Newry Road, Crossmaglen	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Dundalk Street, Newtownhamilton, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Main Street, Forkhill, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newtownhamilton Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nisa, Carrickasticken Road, Forkhill, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Concession Road, Cullaville, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Vivo (Murphy's), Silverbridge Road, Silverbridge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 1 sub-total	0.1%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 NI							
Bessbrook Village Centre	4.7%	7.1%	14.0%	0.0%	0.0%	0.0%	0.0%
Bravo Max, Corn Market, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Buttercrane Shopping Centre, Buttercrane Quay, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Camlough Village Centre	0.1%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Warrenpoint Road, Greenbank, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter (Grant's), Hilltown Road, Mayobridge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Bettyshill Road, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Dublin Road, Cloughoge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Damolly Retail Park, Armagh Road, Newry	3.5%	6.7%	4.8%	4.9%	2.7%	0.0%	0.0%
Dunnes Stores, Old Creamery Shopping Centre, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Fiveways Shop and Service Station, Armagh Road, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Monaghan Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Castle Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Cloghanramer Road, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mayobridge Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newry City Centre	22.9%	27.8%	58.7%	15.8%	1.0%	0.0%	0.0%
Nisa, Main Street, Camlough, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
O'Hare's Supermarket, Newry Road, Mayobridge, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Old Creamery Retail Park, Monaghan Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others Zone 2	2.7%	8.9%	1.8%	5.4%	0.0%	0.0%	0.0%
Sainsbury's, The Quays, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Buttercrane Shopping Centre, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Hill Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Downshire Road, Carneyhough Court, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Good Food Shop, Hill Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Quays, Bridge Street, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Village Shop, The Village, Jonesborough, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 sub-total	33.9%	51.5%	79.4%	26.2%	3.7%	0.0%	0.0%
Zone 3 NI							
Annalong Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Newcastle Street, Kilkeel, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, (Grant's) Bog Road, Kilkeel	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Bog Road, Kilkeel, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, The Square, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kilkeel Town Centre	11.6%	0.0%	1.5%	48.4%	6.1%	0.0%	0.0%
Mace, Main Street, Rathfriland, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Milestone Service Station, Newry Street, Rathfriland, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nisa Fresh Food Centre, Church Street, Warrenpoint, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others Zone 3	0.4%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%
Spar, Greencastle Street, Kilkeel, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Vivo (Murdock's), Upper Dromore Road, Warrenpoint, Newry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Warrenpoint Town Centre	3.1%	3.6%	1.5%	10.4%	0.0%	0.0%	0.0%
Zone 3 sub-total	15.1%	3.6%	4.6%	58.8%	6.1%	0.0%	0.0%
Zone 4 NI							
Castlewellan Town Centre	1.8%	0.0%	0.0%	0.0%	11.8%	2.2%	0.0%
Centra, Railway Street, Newcastle	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Railway Street, Newcastle	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newcastle Town Centre	5.5%	0.0%	0.0%	4.1%	33.5%	3.9%	0.0%
Others Zone 4	0.1%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%
Tesco Superstore, Castlewellan Road, Newcastle	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 4 sub-total	7.4%	0.0%	0.0%	4.1%	46.3%	6.1%	0.0%
Zone 5 NI							
Ardglass Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Ballydugan Retail Park, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ballyhornan Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Lisdoonan, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Market Street, Downpatrick	0.4%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%
Costcutter, The Ballymote Centre, Killough Road, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Crossgar Village Centre	2.4%	0.0%	0.0%	0.0%	0.0%	9.0%	7.0%
Downpatrick Town Centre	10.9%	0.0%	0.0%	0.0%	8.2%	40.2%	24.9%
Killyleagh Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others Zone 5	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Downpatrick Road, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Killough Road, Downpatrick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 5 sub-total	13.7%	0.0%	1.5%	0.0%	8.2%	49.2%	31.8%
Zone 6 NI							
Ballynahinch Town Centre	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	12.9%
Iceland, High Street, Ballynahinch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Harmony Way, Ballynahinch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Morrisons Vivoxtra, Ballynahinch Road, Saintfield, Ballynahinch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Saintfield Village Centre	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	6.8%
Zone 6 sub-total	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	19.7%
District sub-total	71.7%	56.1%	85.5%	89.2%	64.3%	55.3%	51.5%

Zone 7 NI							
Ardkeen Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cloughy Village Centre	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%
Portaferry Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Portavogie Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 7 sub-total	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%
Other NI Outside Study Area							
Ards Shopping Centre, Circular Road, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Armagh Town Centre	2.1%	17.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Bridge Street, Portadown	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ballywalter Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Banbridge Town Centre	0.4%	0.0%	0.0%	0.0%	2.3%	0.0%	1.7%
Bangor Town Centre	0.2%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%
Belfast City Centre	11.7%	3.4%	8.1%	5.9%	22.8%	20.1%	15.7%
Belleck Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bloomfield Shopping Centre & Retail Park, South Circular Road, Bangor	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Boucher Retail Park, Boucher Road, Belfast	2.2%	0.0%	0.0%	1.3%	0.0%	8.0%	3.5%
Centra, Armagh Road, Keady	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Portadown Road, Deansbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Clandeboyne Retail Park, West Circular Road, Bangor	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, Lisburn Street, Hillsborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Ballygowan Road, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Scarva Street, Lough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Donaghadee Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dungannon Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eurospar, Scarva Street, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Forestside Shopping Centre, Upper Galwally, Belfast	0.5%	0.0%	0.0%	1.3%	0.0%	1.2%	0.0%
Hillsborough Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hollywood Exchange, Airport Road West, Belfast	1.7%	3.6%	0.0%	0.0%	1.4%	4.6%	2.9%
Hollywood Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Meadow Lane, Portadown	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Newry Street, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Keady Village Centre	0.1%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Kircubbin Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Moy Road, Armagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lisburn City Centre	1.5%	0.0%	0.0%	0.0%	5.6%	1.4%	6.8%
Markethill Village Centre	1.4%	7.0%	1.5%	0.0%	1.3%	0.0%	0.0%
Newtownards Town Centre	1.3%	0.0%	0.0%	0.0%	0.0%	3.2%	7.9%
Nisa Local, Main Street, Markethill, Armagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Main Street, Carrowdore, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Meeting Street, Dromore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Springhill Retail Park, Killeen Avenue, Bangor	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sprucefield Park, Hillsborough Road, Lisburn	0.7%	3.6%	0.0%	0.0%	1.0%	0.0%	1.4%
Supervalu, Banbridge Road, Dromore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Castle Street, Comber, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Bridgewater Retail Park, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Castlebawn Drive, Newtownards	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Outlet Bridgewater Park, Cascum Road, Banbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other NI Outside Study Area sub-total	23.8%	36.1%	9.6%	8.5%	34.4%	39.8%	39.9%
Castleblayney Zone RoI							
Castleblayney Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Centra, Main Street, Black Island, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Monaghan Road, Moraghy, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Londis, Dublin Road, Onomy, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Glencarn Town Centre, Conabury, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Watter Supermarket, Dublin Road, Onomy, Castleblayney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Castleblayney sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carrickmacross Zone RoI							
Aldi, Riverside Road, Drummond Otra, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carrickmacross Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Ardee Road, Drummond Otra, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Market Square Shopping Centre, Drummond Etra, Carrickmacross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carrickmacross sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundalk Zone RoI							
Aldi, Newry Road, Lisdoon, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carlingford Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carthage Supermarket, Clanbrassil Street, Townparks, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Clanbrassil Street, Townparks, Dundalk, Co. Louth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundalk Retail Park, Marshes Upper, Dundalk	1.5%	1.1%	4.9%	0.0%	0.0%	0.0%	0.0%
Dundalk Town Centre	0.3%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, Ard Easmuinn Road, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dunnes Stores, Hoey's Lane, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Home Savers, Dundalk Retail Park, Inner Relief Road, Marshes Upper, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Castle Road, Townparks, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Avenue Road, Greenacres, Marshes Lower, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Carrickmacross Road, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mace, Castletown Road, Moorland, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marshes Shopping Centre, Marshes Avenue, Marshes Lower, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Northlink Retail Park, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Dublin Road, Townparks, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Dundalk Shopping Centre, Stapleton Drive, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Metro, Longwalk Shopping Centre, The Long Walk, Dundalk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dundalksub-total	1.7%	3.3%	4.9%	0.0%	0.0%	0.0%	0.0%





Other NI Outside Study Area							
Armagh Town Centre	£0.7	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0
Asda, Bridge Street, Portadown	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Banbridge Town Centre	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
Bangor Town Centre	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
Belfast City Centre	£3.9	£0.1	£0.8	£0.4	£0.8	£1.2	£0.5
Bloomfield Shopping Centre & Retail Park, South Circular Road, Bangor	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Boucher Retail Park, Boucher Road, Belfast	£0.7	£0.0	£0.0	£0.1	£0.0	£0.5	£0.1
Centra, Armagh Road, Keady	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Donaghadee Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dungannon Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Forestside Shopping Centre, Upper Galwally, Belfast	£0.2	£0.0	£0.0	£0.1	£0.0	£0.1	£0.0
Hollywood Exchange, Airport Road West, Belfast	£0.6	£0.1	£0.0	£0.0	£0.0	£0.3	£0.1
Keady Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Lisburn City Centre	£0.5	£0.0	£0.0	£0.0	£0.2	£0.1	£0.2
Markethill Village Centre	£0.5	£0.3	£0.1	£0.0	£0.0	£0.0	£0.0
Newtownards Town Centre	£0.5	£0.0	£0.0	£0.0	£0.0	£0.2	£0.3
Springhill Retail Park, Killeen Avenue, Bangor	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sprucefield Park, Hillsborough Road, Lisburn	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Bridgewater Retail Park, Banbridge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Castlebawn Drive, Newtownards	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
The Outlet Bridgewater Park, Cascum Road, Banbridge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other NI Outside Study Area sub-total	£7.9	£1.4	£0.9	£0.6	£1.2	£2.5	£1.4
Castleblayney Zone Rol							
Lidl, Monaghan Road, Moraghy, Castleblayney	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Castleblayney sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Carrickmacross Zone Rol							
Carrickmacross sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalk Zone Rol							
Aldi, Newry Road, Lisdoo, Dundalk	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalk Retail Park, Marshes Upper, Dundalk	£0.5	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0
Dundalk Town Centre	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
Home Savers, Dundalk Retail Park, Inner Relief Road, Marshes Upper, Dundalk	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Dublin Road, Townparks, Dundalk	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalksub-total	£0.6	£0.1	£0.5	£0.0	£0.0	£0.0	£0.0
Drogheda Zone Rol							
Drogheda Retail Park, Donore Road, Rathmullan, Meath	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Drogheda Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Drogheda sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other ROI Outside Study Area							
Dublin City Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Dundrum Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other ROI Outside Study Area sub-total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Others							
Other	£0.9	£0.2	£0.0	£0.2	£0.0	£0.3	£0.2
Abroad	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Total	£33.0	£3.8	£9.3	£6.8	£3.4	£6.2	£3.5

Table 25: Comparison Goods expenditure

Destination	Total Comparison - District (£m)	Total Comparison (%)	Zone 1 Comparison (£m)	Zone 2 Comparison (£m)	Zone 3 Comparison (£m)	Zone 4 Comparison (£m)	Zone 5 Comparison (£m)	Zone 6 Comparison (£m)	Inflow Comparison (£m)	Total Comparison - with Inflow (£m)
Zone 1 NI										
Crossmaglen Town Centre	£2.3	0.6%	£1.5	£0.8	£0.0	£0.0	£0.0	£0.0	£0.2	£2.6
Cullaville Village Centre	£0.4	0.1%	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
Newtownhamilton Town Centre	£0.1	0.0%	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Zone 1 sub-total	£2.8	0.7%	£2.0	£0.8	£0.0	£0.0	£0.0	£0.0	£0.2	£3.1
Zone 2 NI										
Bessbrook Village Centre	£2.4	0.6%	£0.7	£1.7	£0.0	£0.0	£0.0	£0.0	£0.0	£2.4
Buttercrane Shopping Centre, Buttercrane Quay, Newry	£4.4	1.1%	£0.1	£2.7	£1.0	£0.5	£0.0	£0.0	£0.7	£5.0
Camlough Village Centre	£2.3	0.6%	£0.2	£2.1	£0.0	£0.0	£0.0	£0.0	£0.0	£2.3
Centra, Warrenpoint Road, Greenbank, Newry	£0.1	0.0%	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Damolly Retail Park, Armagh Road, Newry	£27.7	6.7%	£4.8	£12.6	£7.5	£2.5	£0.2	£0.0	£2.8	£30.4
Dunnes Stores, Old Creamery Shopping Centre, Newry	£1.5	0.4%	£0.4	£1.2	£0.0	£0.0	£0.0	£0.0	£0.0	£1.5
Fiveways Shop and Service Station, Armagh Road, Newry	£0.3	0.1%	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3
Lidl, Castle Street, Newry	£0.2	0.0%	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Mace, Cloghanramer Road, Newry	£0.5	0.1%	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
Mayobridge Village Centre	£0.4	0.1%	£0.1	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
Newry City Centre	£133.9	32.3%	£20.4	£71.7	£33.3	£7.3	£1.2	£0.1	£20.1	£154.0
Old Creamery Retail Park, Monaghan Street, Newry	£0.1	0.0%	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Others Zone 2	£2.4	0.6%	£0.7	£1.0	£0.4	£0.3	£0.0	£0.0	£0.0	£2.4
Sainsbury's, The Quays, Newry	£2.9	0.7%	£0.3	£0.0	£2.6	£0.0	£0.0	£0.0	£0.0	£2.9
Spar, Buttercrane Shopping Centre, Newry	£0.1	0.0%	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Supervalu, Hill Street, Newry	£0.1	0.0%	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Tesco Extra, Downshire Road, Carneyhough Court, Newry	£1.0	0.3%	£0.5	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0
The Quays, Bridge Street, Newry	£5.6	1.4%	£0.6	£4.9	£0.0	£0.1	£0.0	£0.0	£0.8	£6.5
Zone 2 sub-total	£186.0	44.9%	£28.9	£99.9	£44.8	£10.7	£1.4	£0.2	£24.4	£210.3
Zone 3 NI										
Annalong Village Centre	£0.4	0.1%	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.4
Asda, Newcastle Street, Kilkeel	£0.7	0.2%	£0.0	£0.0	£0.5	£0.2	£0.0	£0.0	£0.0	£0.7
Kilkeel Town Centre	£20.9	5.0%	£0.0	£0.1	£20.3	£0.4	£0.0	£0.0	£0.0	£20.9
Nisa Fresh Food Centre, Church Street, Warrenpoint	£0.1	0.0%	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1
Others Zone 3	£1.5	0.4%	£0.0	£0.3	£1.1	£0.0	£0.0	£0.0	£0.0	£1.5
Warrenpoint Town Centre	£3.4	0.8%	£0.1	£0.1	£3.1	£0.0	£0.0	£0.0	£0.0	£3.4
Zone 3 sub-total	£26.9	6.5%	£0.1	£0.6	£25.5	£0.6	£0.0	£0.0	£0.0	£26.9
Zone 4 NI										
Castlewellaan Town Centre	£3.1	0.8%	£0.0	£0.0	£0.1	£2.1	£1.0	£0.0	£0.0	£3.1
Newcastle Town Centre	£12.6	3.0%	£0.0	£0.0	£1.4	£9.9	£1.0	£0.2	£0.6	£13.2
Others Zone 4	£0.2	0.0%	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.2
Tesco Superstore, Castlewellaan Road, Newcastle	£0.2	0.0%	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.2
Zone 4 sub-total	£16.0	3.9%	£0.0	£0.0	£1.5	£12.4	£2.0	£0.2	£0.6	£16.7
Zone 5 NI										
Ardglass Village Centre	£0.4	0.1%	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.4
Asda, Ballydugan Retail Park, Downpatrick	£3.2	0.8%	£0.0	£0.0	£0.0	£0.3	£2.5	£0.4	£0.0	£3.2
Costcutter, Market Street, Downpatrick	£0.1	0.0%	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Crossgar Village Centre	£2.6	0.6%	£0.0	£0.0	£0.0	£0.0	£2.2	£0.4	£0.0	£2.6
Downpatrick Town Centre	£30.3	7.3%	£0.0	£0.0	£1.1	£3.0	£23.1	£3.1	£1.5	£31.8
Killyleagh Village Centre	£1.0	0.2%	£0.0	£0.0	£0.0	£0.0	£1.0	£0.0	£0.0	£1.0
Zone 5 sub-total	£37.7	9.1%	£0.0	£0.1	£1.1	£3.3	£29.2	£3.9	£1.5	£39.2
Zone 6 NI										
Ballynahinch Town Centre	£9.8	2.4%	£0.0	£0.0	£0.0	£0.4	£2.4	£7.0	£0.5	£10.3
Saintfield Village Centre	£3.6	0.9%	£0.0	£0.0	£0.0	£0.0	£0.8	£2.9	£0.0	£3.6
Zone 6 sub-total	£13.4	3.2%	£0.0	£0.0	£0.0	£0.4	£3.1	£9.9	£0.5	£13.9
District sub-total	£282.9	68.3%	£31.0	£101.5	£72.9	£27.5	£35.8	£14.2	£27.2	£310.1
Zone 7 NI										
Cloughy Village Centre	£0.2	0.0%	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0		
Zone 7 sub-total	£0.2	0.0%	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0		
Other NI Outside Study Area										
Armagh Town Centre	£5.9	1.4%	£5.9	£0.0	£0.0	£0.0	£0.0	£0.0		
Asda, Bridge Street, Portadown	£0.1	0.0%	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0		
Banbridge Town Centre	£7.1	1.7%	£0.1	£2.3	£2.7	£0.6	£1.1	£0.3		
Bangor Town Centre	£0.6	0.1%	£0.0	£0.0	£0.0	£0.1	£0.3	£0.2		
Belfast City Centre	£41.6	10.1%	£0.6	£3.0	£3.8	£7.3	£18.0	£8.9		
Bloomfield Shopping Centre & Retail Park, South Circular Road, Bangor	£0.2	0.0%	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0		
Boucher Retail Park, Boucher Road, Belfast	£4.0	1.0%	£0.4	£0.0	£0.1	£0.1	£2.7	£0.6		
Centra, Armagh Road, Keady	£0.1	0.0%	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0		
Donaghadee Town Centre	£1.0	0.2%	£0.0	£0.0	£0.9	£0.0	£0.1	£0.0		
Dungannon Town Centre	£0.3	0.1%	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0		
Forestside Shopping Centre, Upper Galwally, Belfast	£11.7	2.8%	£0.0	£0.0	£0.4	£0.8	£8.1	£2.4		
Hollywood Exchange, Airport Road West, Belfast	£7.1	1.7%	£0.8	£0.2	£0.2	£1.2	£3.0	£1.6		
Keady Village Centre	£0.9	0.2%	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0		
Lisburn City Centre	£14.7	3.6%	£0.5	£0.1	£0.1	£2.0	£3.0	£9.0		
Markethill Village Centre	£3.3	0.8%	£1.7	£1.2	£0.0	£0.4	£0.0	£0.0		
Newtownards Town Centre	£5.3	1.3%	£0.0	£0.0	£0.0	£0.2	£3.4	£1.7		
Springhill Retail Park, Killeen Avenue, Bangor	£0.3	0.1%	£0.0	£0.0	£0.0	£0.2	£0.0	£0.1		
Sprucefield Park, Hillsborough Road, Lisburn	£6.0	1.5%	£0.4	£0.1	£0.1	£0.7	£1.5	£3.2		
Tesco Extra, Bridgewater Retail Park, Banbridge	£1.3	0.3%	£0.0	£0.8	£0.0	£0.5	£0.0	£0.0		
Tesco Extra, Castlebawn Drive, Newtownards	£0.4	0.1%	£0.0	£0.0	£0.0	£0.0	£0.3	£0.1		
The Outlet Bridgewater Park, Cascum Road, Banbridge	£2.9	0.7%	£0.1	£1.0	£1.5	£0.4	£0.0	£0.0		
Other NI Outside Study Area sub-total	£114.8	27.7%	£11.9	£8.9	£9.9	£14.5	£41.7	£28.0		
Castleblayney Zone RoI										
Lidl, Monaghan Road, Moraghy, Castleblayney	£0.3	0.1%	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0		
Castleblayney sub-total	£0.3	0.1%	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0		
Carrickmacross Zone RoI										
Carrickmacross sub-total	£0.0	0.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0		

Dundalk Zone RoI								
Aldi, Newry Road, Lisdoo, Dundalk	£0.1	0.0%	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalk Retail Park, Marshes Upper, Dundalk	£2.1	0.5%	£1.4	£0.5	£0.2	£0.0	£0.0	£0.0
Dundalk Town Centre	£2.3	0.6%	£2.1	£0.2	£0.0	£0.0	£0.0	£0.0
Home Savers, Dundalk Retail Park, Inner Relief Road, Marshes Upper, Dundalk	£0.1	0.0%	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Dublin Road, Townparks, Dundalk	£0.2	0.0%	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0
Dundalksub-total	£4.8	1.2%	£3.8	£0.8	£0.2	£0.0	£0.0	£0.0
Drogheda Zone RoI								
Drogheda Retail Park, Donore Road, Rathmullan, Meath	£0.6	0.1%	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0
Drogheda Town Centre	£0.1	0.0%	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
Drogheda sub-total	£0.7	0.2%	£0.1	£0.0	£0.6	£0.0	£0.0	£0.0
Other RoI Outside Study Area								
Dublin City Centre	£0.2	0.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Dundrum Village Centre	£0.2	0.1%	£0.0	£0.0	£0.0	£0.1	£0.2	£0.0
Other ROI Outside Study Area sub-total	£0.4	0.1%	£0.0	£0.0	£0.0	£0.1	£0.2	£0.2
Others								
Other	£8.5	2.1%	£4.1	£0.0	£1.3	£1.5	£0.8	£0.9
Abroad	£1.4	0.3%	£0.0	£0.7	£0.2	£0.2	£0.0	£0.3
Total	£414.1	100.0%	£50.9	£112.1	£85.2	£43.8	£78.6	£43.6

Table 26a: Estimated 'capacity' for new comparison goods facilities in Newry, Mourne & Down

Year	Total Survey Turnover (£m) <sup>1</sup>	District Turnover (£m) <sup>2</sup>	Inflow (£m)	Surplus Expenditure (£m)
2022	310.1	282.9	27.2	0.0
2025	331.4	315.0	30.3	13.9
2030	372.4	356.6	34.3	18.6
2035	423.4	410.0	39.4	26.1
Study Area Market Share (%)		68.3%		

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 19 (January 2022)  
2. Assumes constant market share claimed by Newry, Mourne & Down facilities at 68.3% from Study Area

2020 Prices

Table 26b: Gross quantitative capacity for additional comparison goods floorspace in Newry, Mourne & Down

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq m net)	
		Min <sup>1</sup>	Max <sup>2</sup>
2022	0.0		
2025	13.9	2,300	3,700
2030	18.6	2,800	4,300
2035	26.1	3,400	5,400

1. Average sales density assumed to be £5,500 per sq.m at 2020 which Nexus Planning considers to be towards the higher end of what could be achieved in Newry, Mourne & Down  
2. Average sales density assumed to be £3,500 per sq.m at 2020 which Nexus Planning considers to be towards the lower end of what could be achieved in Newry, Mourne & Down  
3. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 19 (January 2022)

2020 Prices

Table 26c: Extant comparison goods commitments in Newry, Mourne & Down

Destination	Reference	Proposal	Net Comparison Floorspace (sq m)	Estimated Sales Density (£/sq m)	Estimated Comparison Turnover (£m)
Ballynahinch - 45 Lisburn Road	LA07/2020/0819/F	Extension to existing showroom and warehouse	164 sq m gross (131 sq m net)	4,500	0.6
Castlewellan - 21-23 Main Street	LA07/2017/1137/F	Demolition of existing building and construction of 3 storey premises to provide ground floor retail unit with delivery bay, first floor storage, offices and staff facilities, second floor plant area with extension of Hillyard House Hotel to provide 8 new bedrooms and change of use of existing kitchen, dining and courtyard areas of guest house to provide new kitchen and restaurant	Net addition of 233 sq m gross (140 sq m net)	4,500	0.6
Kilkeel - 40-46 Newry Street	P/2015/0031/F	Extension and alterations to existing electrical showrooms including the demolition and incorporation of existing dwelling	Net addition of 360 sq m gross (216 sq m net)	4,500	1.0
Killyleagh - The Harbour	LA07/2015/0388/F	Demolition of existing commercial premises and provision of commercial/retail space at ground floor level with first floor apartments. provision of off street car parking to rear of premises.	460 sq m gross (276 sq m net)	4,500	1.2
Newry - 99-101 Armagh Road	LA07/2016/0692/F	Extension to existing retail unit to provide additional sales floor space (975 Sq M), Relocation of restaurant to first floor, internal ancillary alterations, storage, modification to car park and other ancillary site works.	Addition of 673 sq m gross (404 sq m net)	4,500	1.8
Newry - Lands at 6 Merchants Quay to the north surrounding 2 Merchants Quay to the north west and east and west of 2-8 Canal Street	LA07/2020/0992/F	Proposed demolition of existing buildings and erection of three ground floor retail units (Use Class A1) and 35 apartments with associated car and cycle parking, bin store, servicing areas, amenity space and landscaping and access arrangements from Merchants Quay and associated raised kerbing.	267 sq m gross (174 sq m net)	4,500	0.8
Warrenpoint - 12a Seaview	LA07/2020/0670/F	Change of use of ground floor from hotel to furniture retail	Addition of 662 sq m gross (assumed 530sq m net)	4,500	2.4
Total					8.4

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

2020 prices

Table 26d: Net quantitative capacity for additional comparison goods floorspace in Newry, Mourne & Down

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min <sup>1</sup>	Max <sup>2</sup>
2022	0.0	8.4			
2025	13.9	9.0	4.9	800	1,300
2030	18.6	10.1	8.5	1,300	2,000
2035	26.1	11.5	14.6	1,900	3,000

1. Average sales density at 2018 assumed to be £5,500 per sq.m at 2020 which Nexus Planning considers to be towards the higher end of what could be achieved in Newry, Mourne & Down  
2. Average sales density at 2018 assumed to be £3,500 per sq.m at 2020 which Nexus Planning considers to be towards the lower end of what could be achieved in Newry, Mourne & Down  
3. Residual calculated by subtracting turnover of commitments (sourced from Table 26c) from surplus expenditure (sourced from Table 26a)  
4. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 19 (January 2022)

2020 Prices

**Appendix B:**

**Town Centre Composition Plans**



Key	
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<span style="display:inline-block; width:15px; height:15px; background-color:orange; border:1px solid black;"></span>	Comparison
<span style="display:inline-block; width:15px; height:15px; background-color:teal; border:1px solid black;"></span>	Leisure Service
<span style="display:inline-block; width:15px; height:15px; background-color:purple; border:1px solid black;"></span>	Financial and Business Services
<span style="display:inline-block; width:15px; height:15px; background-color:red; border:1px solid black;"></span>	Retail Service
<span style="display:inline-block; width:15px; height:15px; background-color:blue; border:1px solid black;"></span>	Vacant

125 metres



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Key

- Convenience
- Comparison
- Leisure Service
- Financial and Business Services
- Retail Service
- Vacant



50 metres

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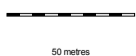
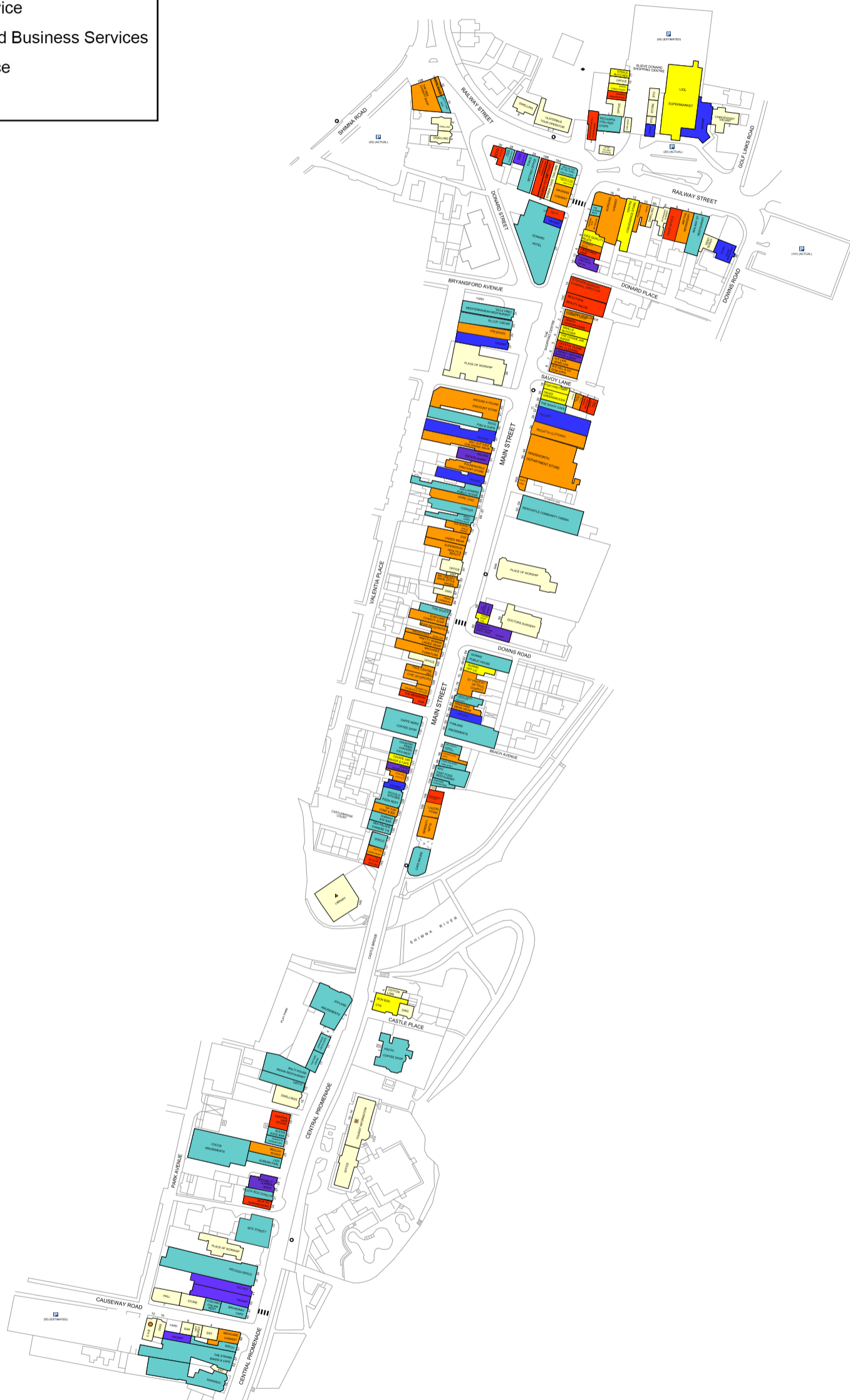
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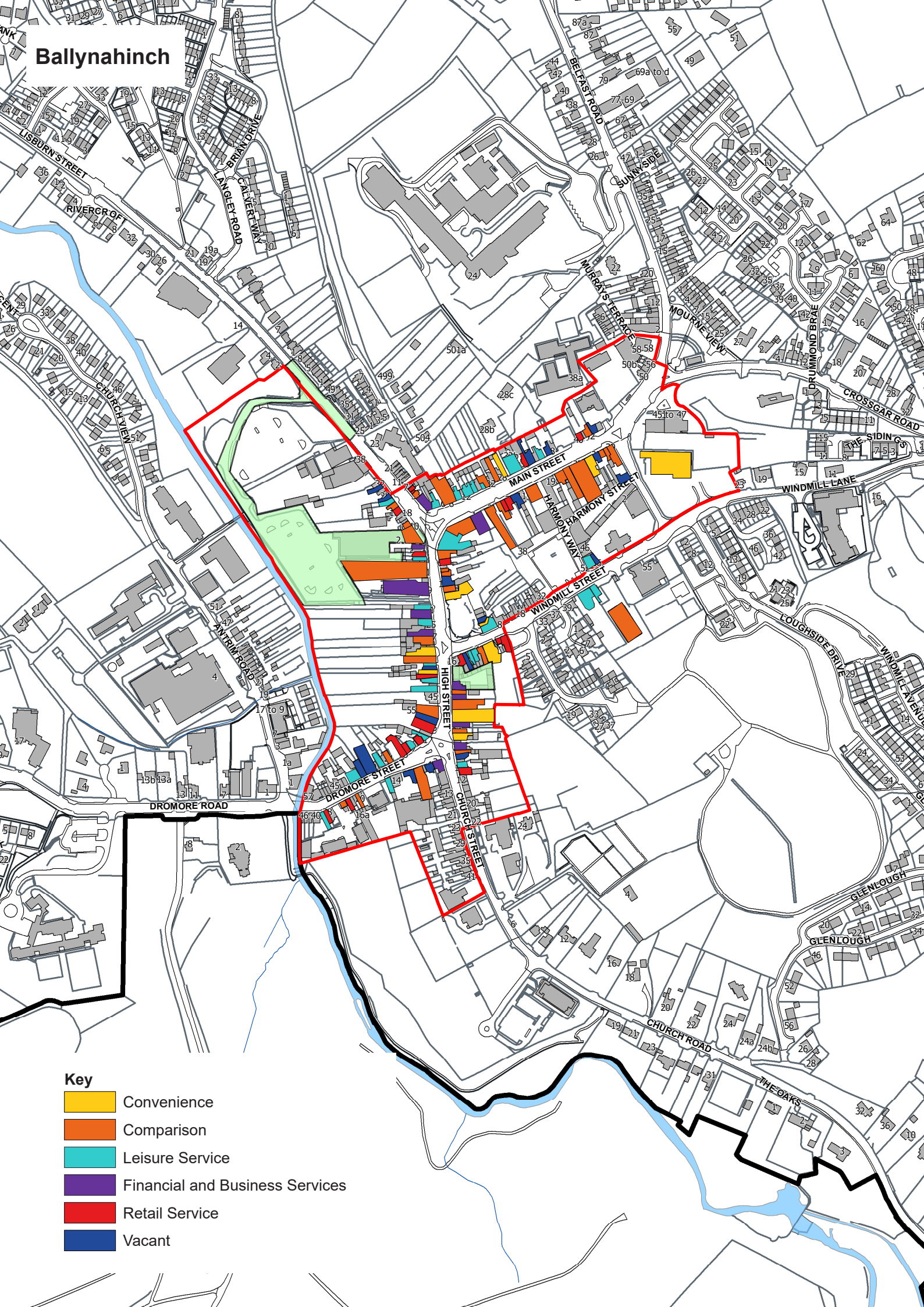
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# Ballynahinch



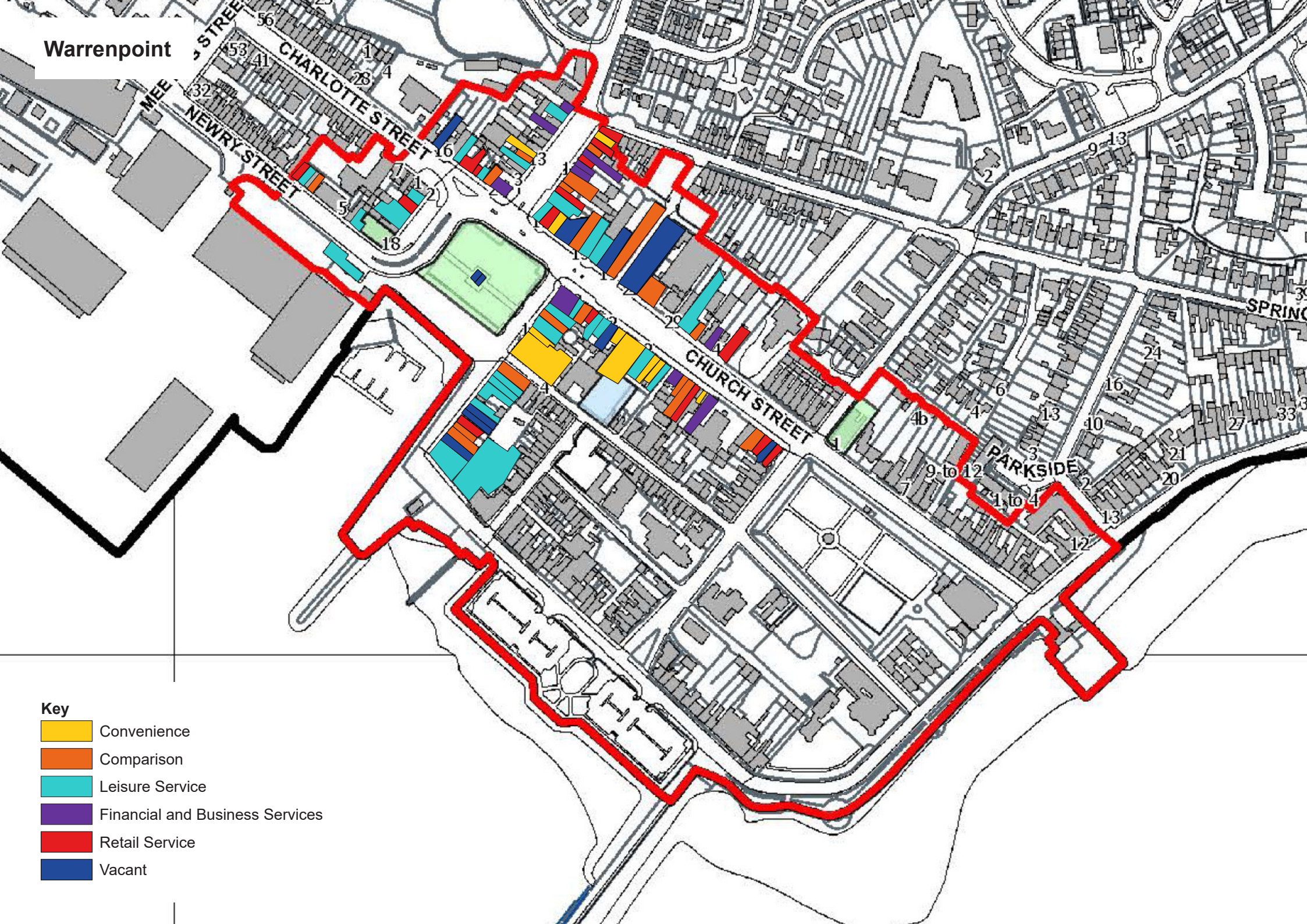
## Key

- Convenience
- Comparison
- Leisure Service
- Financial and Business Services
- Retail Service
- Vacant

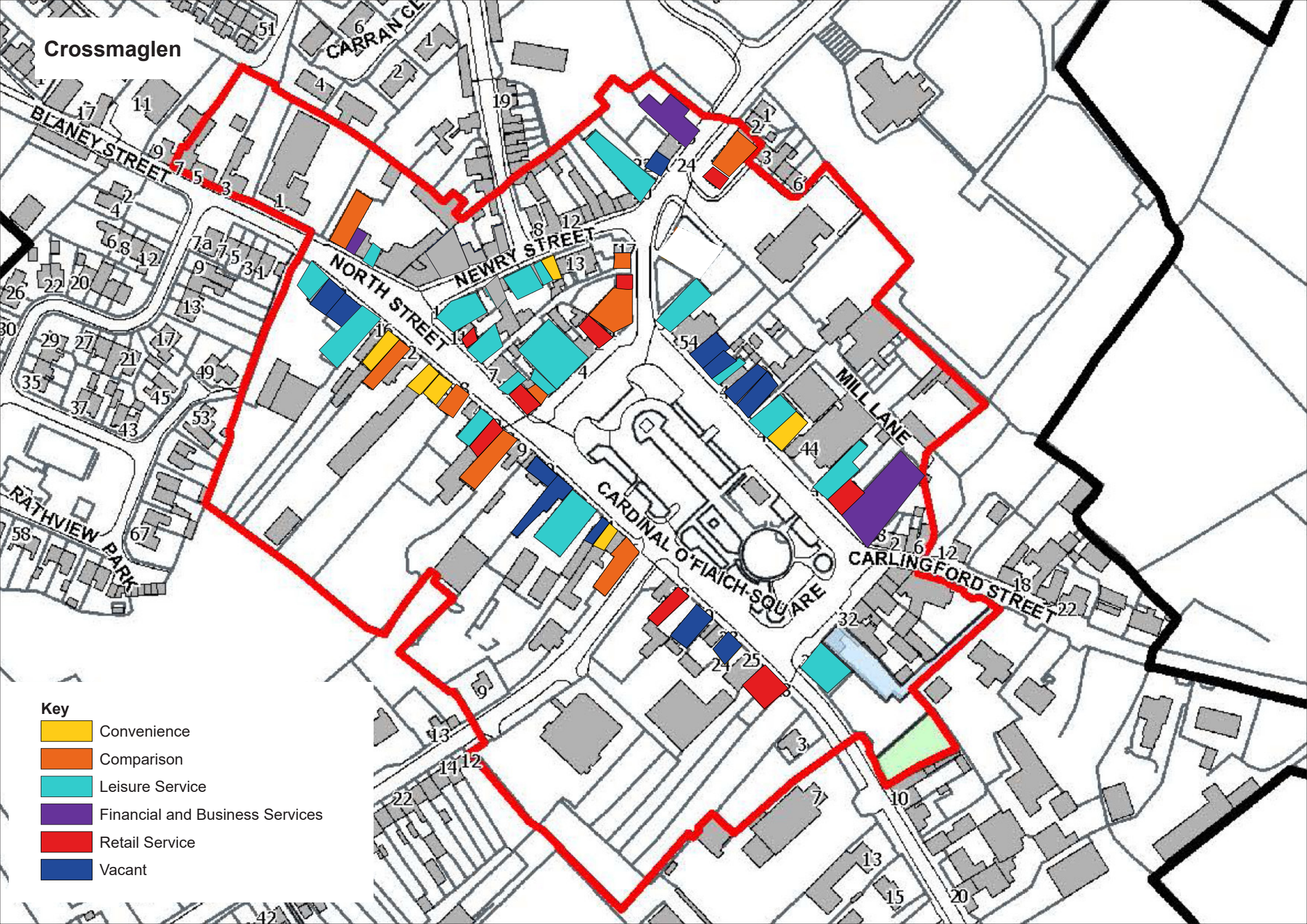
Warrenpoint

Key

- Convenience
- Comparison
- Leisure Service
- Financial and Business Services
- Retail Service
- Vacant

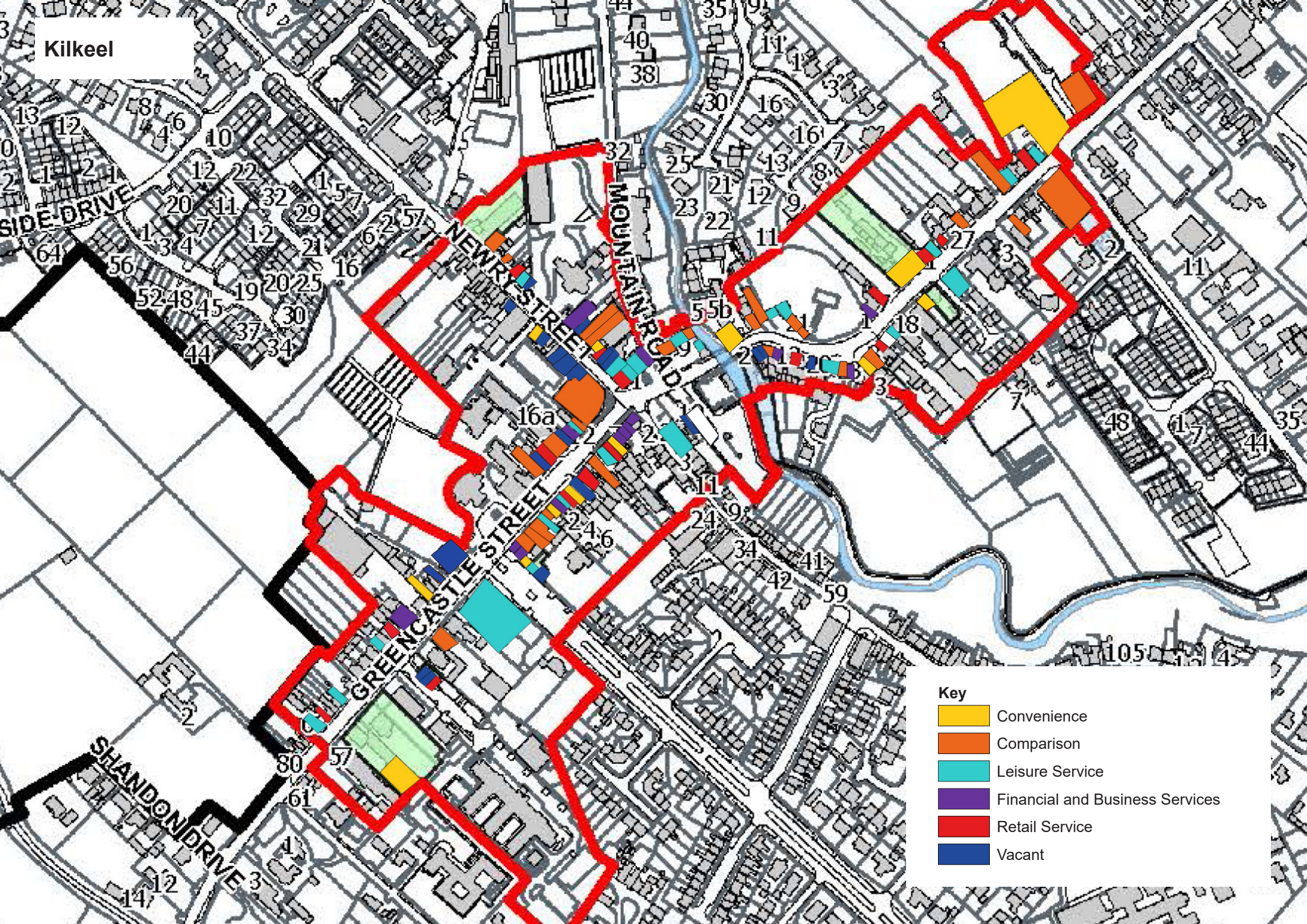


# Crossmaglen

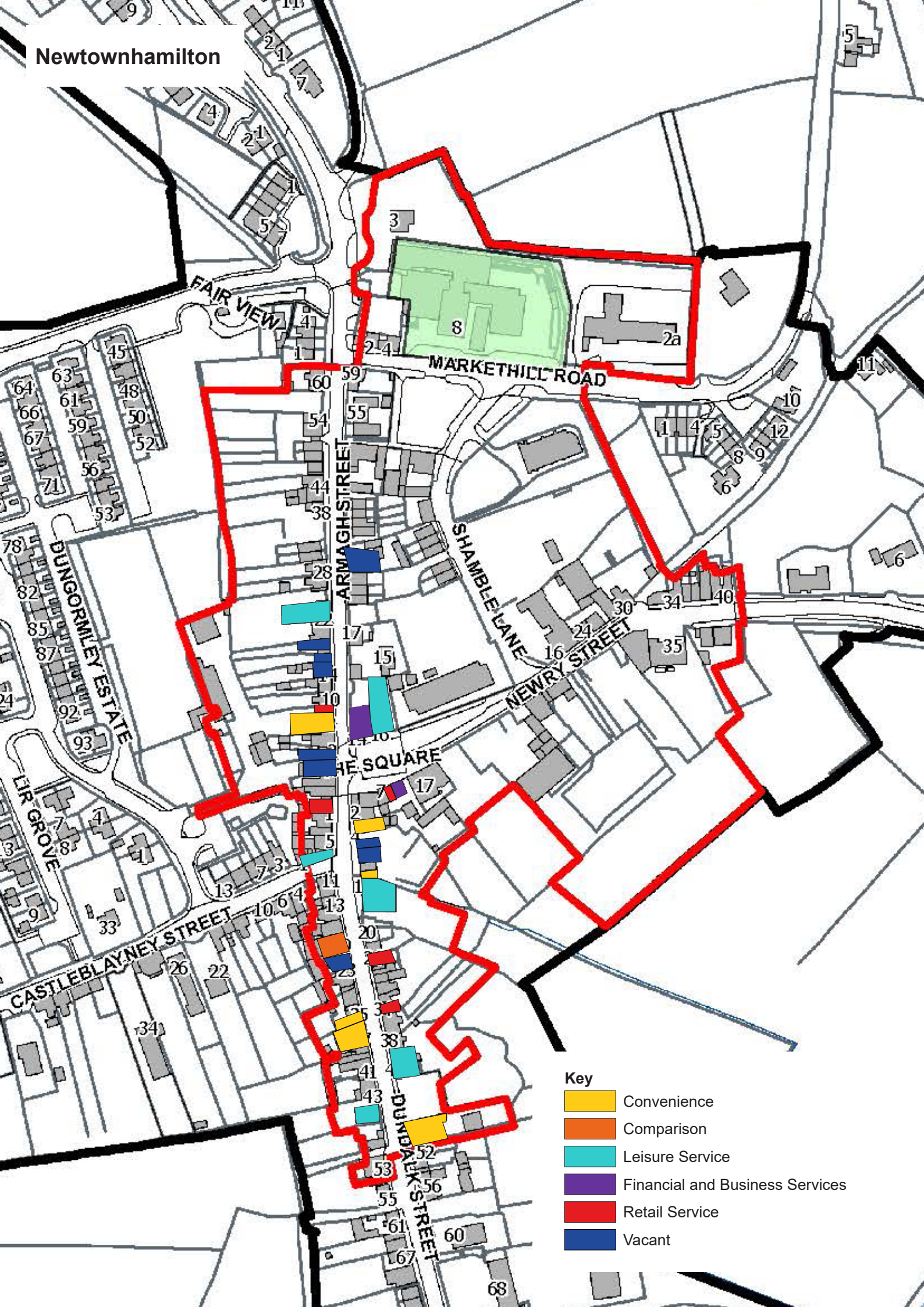


## Key

- Convenience
- Comparison
- Leisure Service
- Financial and Business Services
- Retail Service
- Vacant

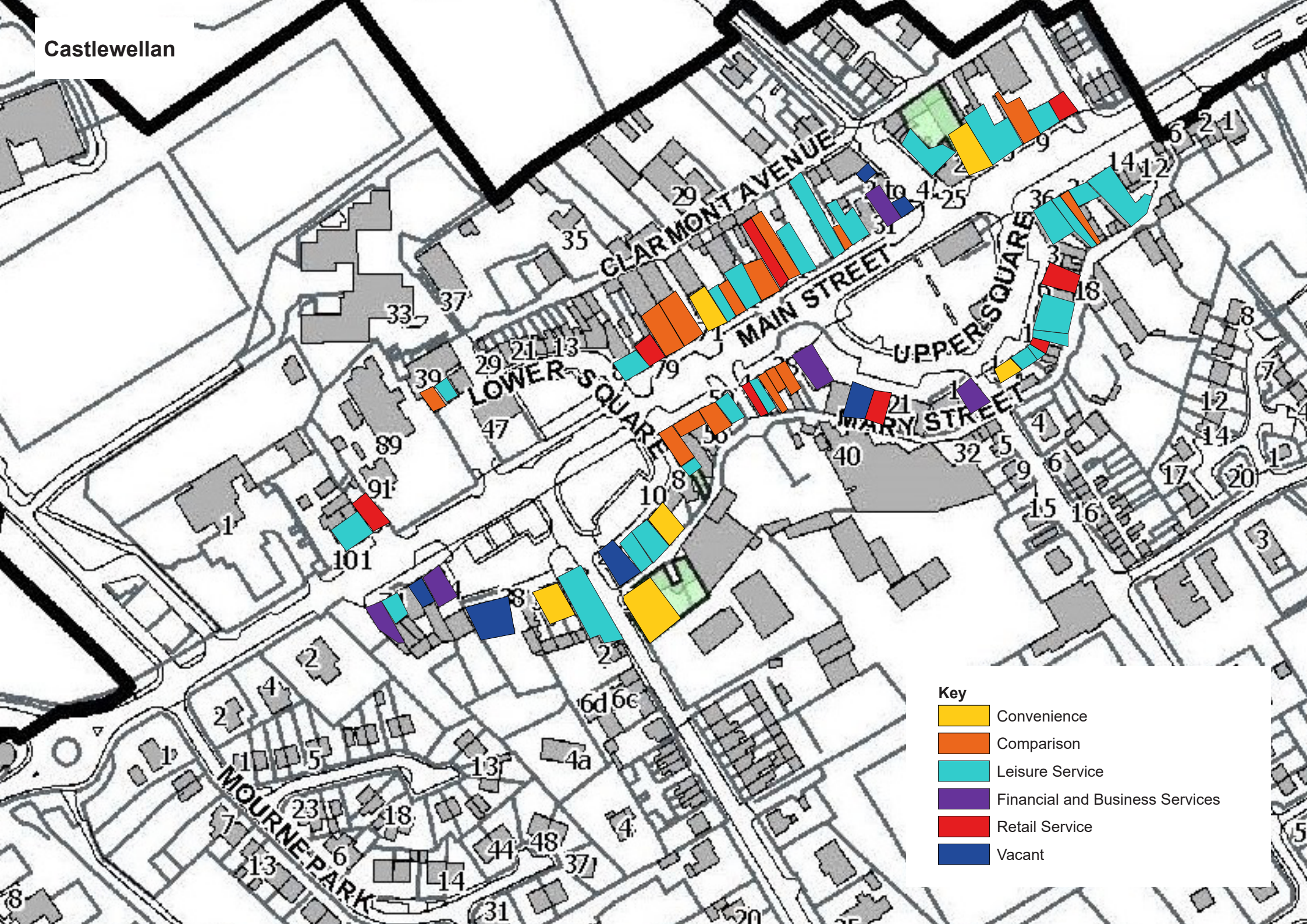


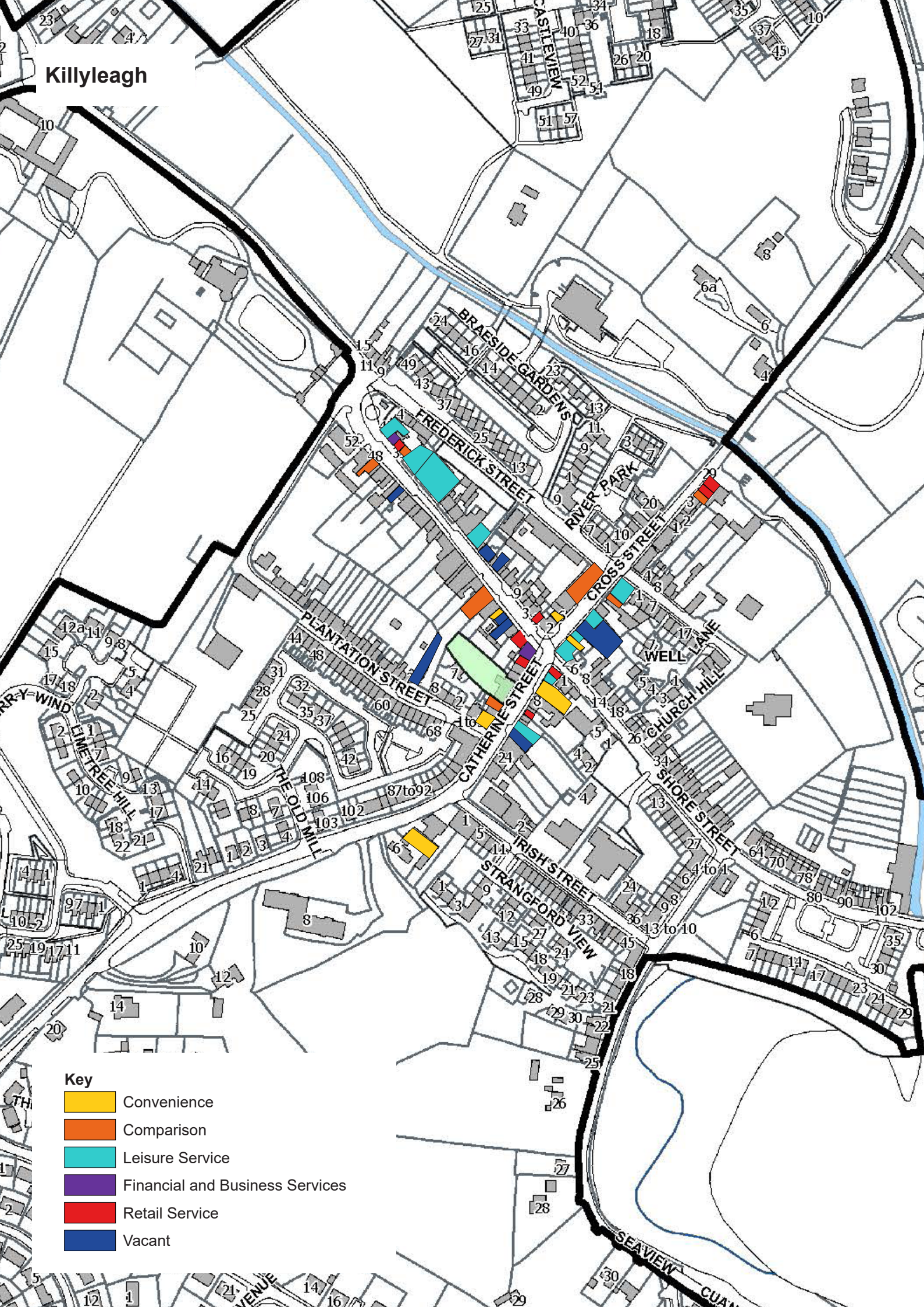
Newtownhamilton



- Key
- Convenience
  - Comparison
  - Leisure Service
  - Financial and Business Services
  - Retail Service
  - Vacant

# Castlewellan



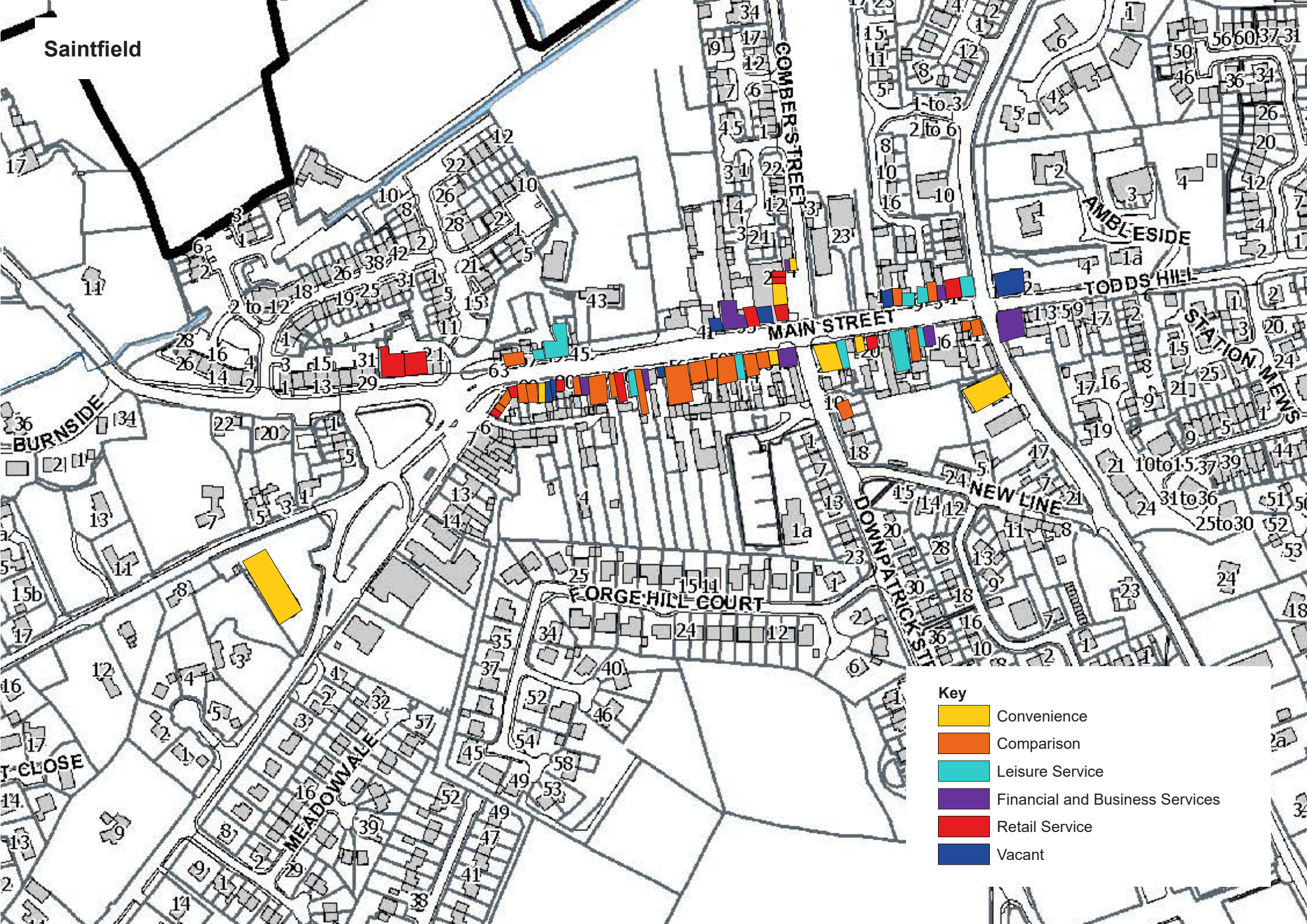


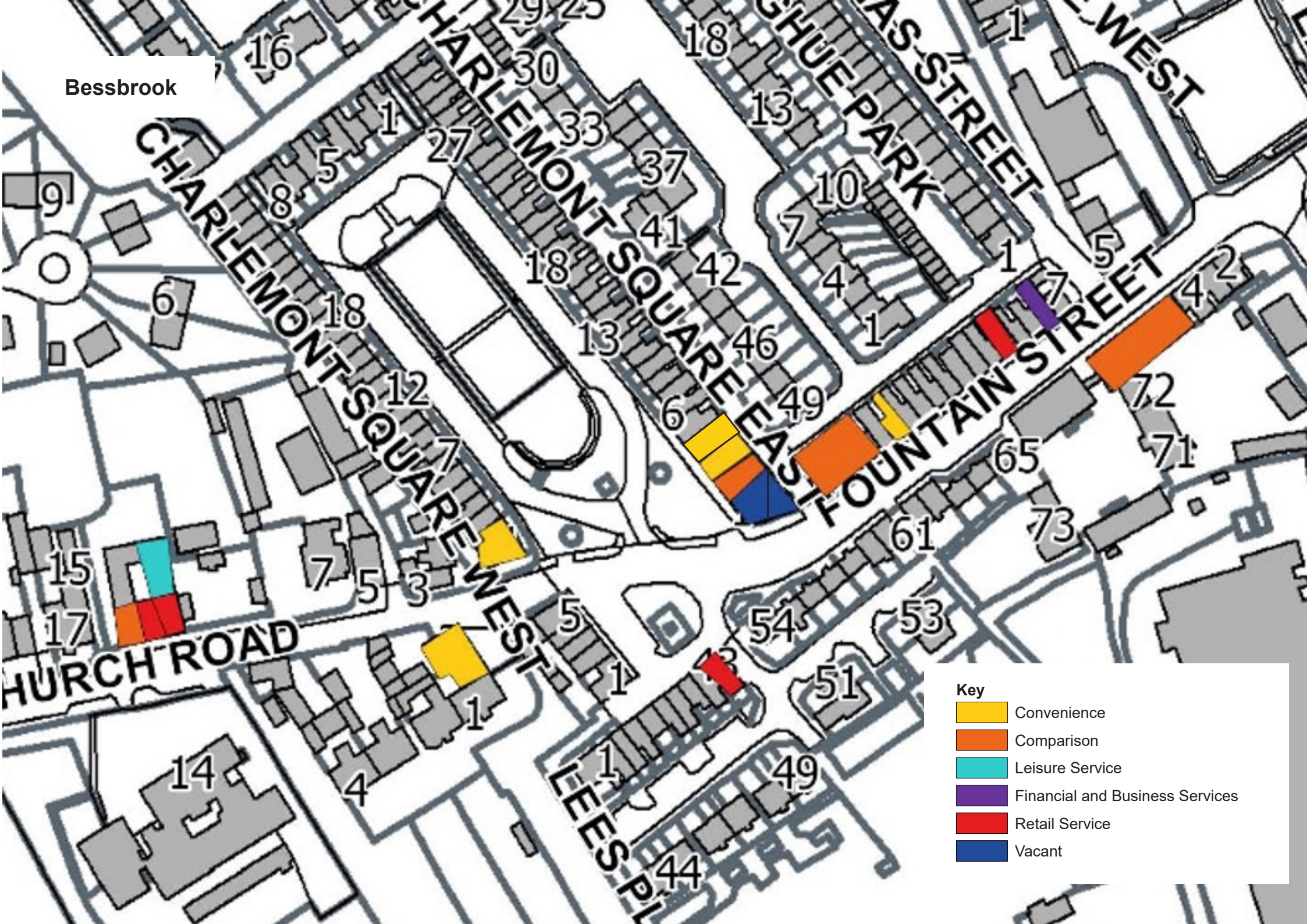
Killyleagh

Key

- Convenience
- Comparison
- Leisure Service
- Financial and Business Services
- Retail Service
- Vacant

Saintfield





Bessbrook

Key

- Convenience
- Comparison
- Leisure Service
- Financial and Business Services
- Retail Service
- Vacant

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