

APPENDIX ONE

FLOORSPACE SURVEY

APPENDIX 1 - WESTMEATH FLOORSPEACE SURVEY

Settlement	Convenience Floorspace (sq m)	Comparison Floorspace (sq m)	Bulky Household Floorspace (sq m)	Vacant Floorspace (sq m)	Total Floorspace (sq m)
Athlone	12,030	16,913	11,207	7,614	47,764
Ballynacarrigy	159	9	0	0	168
Ballymore	322	0	0	0	322
Castlepollard	396	190	0	22	608
Clonmellon	265	0	0	93	358
Delvin	369	49	0	119	537
Glasson	182	96	28	42	348
Kilbeggan	307	442	40	1,582	2,371
Killucan	116	73	0	0	189
Kinnegad	954	1,001	0	82	2,037
Milltownpass	348	0	0	0	348
Moate	1,152	1,034	449	105	2,740
Mullingar	8841	14137	15857	3908	42,743
Rochfordbridge	135	63	0	84	282
Tyrellspass	631	33.6	95	21	781
Other Towns	1135	0	3300	0	4,435
Total Floorspace	27,341	34,041	30,976	13,672	106,030

APPENDIX TWO

HOUSEHOLD / SHOPPERS SURVEY

ATHLONE SHOPPERS' SURVEY

Good morning/ afternoon. I am undertaking a town centre survey on behalf of Westmeath County Council. We are asking people about their shopping habits and what they think of the town centre. Can you spare a few minutes of your time to answer a few questions?

INTERVIEWER (1) _____

TOWN (2) ____ATHLONE

DATE (3) _____

LOCATION (5) _____

<p>1 First, can I ask what is the <u>main</u> purpose of your visit to the Town Centre today? Is it....</p> <p>supermarket shopping A</p> <p>shopping for food and groceries at other shops B</p> <p>shopping for clothes/shoes C</p> <p>visit the market D</p> <p>other forms of shopping E</p> <p>visiting pub / café / restaurant F</p> <p>visiting bank or building society G</p> <p>leisure / recreation H</p> <p>education I</p> <p>work here J</p> <p>other (WRITE IN)</p>	<p>[6]</p>	<p>7 How long will you have stayed in the Town Centre today from the time you arrived until the time you leave?</p> <p>less than 30 minutes 1</p> <p>30 - 59 minutes 2</p> <p>1 - 2 hours 3</p> <p>2 - 3 hours 4</p> <p>3 - 4 hours 5</p> <p>longer than 4 hours 6</p>	<p>[13]</p>
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<p><i>IF THIS IS THE MAIN SHOPPING CENTRE</i></p> <p>12 Why do you use (THIS) Town Centre? (MULTICODE, DO NOT PROMPT)</p> <p>close to home 1</p> <p>close to work 2</p> <p>easy to get to 3</p> <p>good public transport links 4</p> <p>sufficient car parking 5</p> <p>reasonably priced car parking 6</p> <p>good selection/quality of shops 7</p> <p>good mix of shopping and leisure facilities 8</p> <p>to visit specific shop(s) (NAME) 9</p> <p>pleasant shopping environment (general ambience) D</p> <p>good standard of street cleanliness E</p> <p>visit the market F</p> <p>safe shopping environment G</p> <p>other (WRITE IN)</p>	<p>[20]</p>	<p>15 Do you have any suggestions for improving this centre? (MULTICODE, DO NOT PROMPT)</p> <p>no nothing 1</p> <p>make the town centre easier to get to 2</p> <p>provide more parking 3</p> <p>more shops 4</p> <p>provide better range of shops 5</p> <p>provide specific shop (NAME) 6</p> <p>provide particular leisure facility (NAME) A</p> <p>improve the cleanliness of the streets F</p> <p>pedestrianise particular street (NAME) G</p> <p>improve the pedestrian environment</p> <p>other (WRITE IN)</p>	<p>[30]</p>
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Thankyou for your help. Would you have any objection if someone from our office called you back by telephone? This would be just be to check that the interview was carried out properly

telephone number _____

name of respondent _____

INTERVIEWER'S SIGNATURE _____

MULLINGAR SHOPPERS' SURVEY

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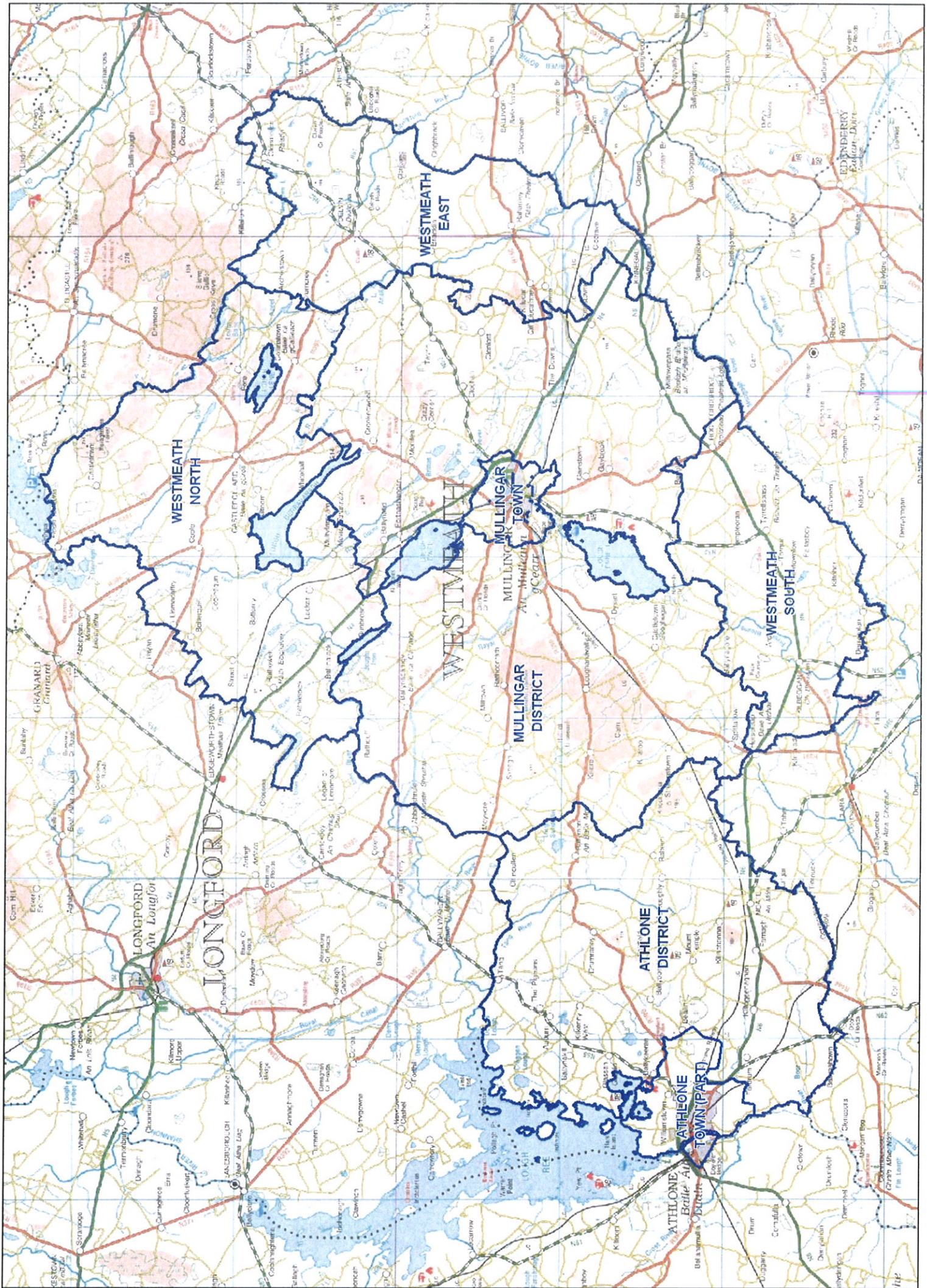
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The map illustrates the geographical layout of the Westmeath constituency. It is divided into four districts: Westmeath North, Westmeath East, Westmeath South, and Westmeath West. Key locations include Mullingar Town and Mullingar District in the north-central area; Athlone Town and Athlone District in the south-central area; and Roscommon (Part) in the southwest. The map shows a dense network of roads and railways, with the word 'WESTMEATH' printed vertically across the center. The map is oriented with North at the top.

APPENDIX THREE

CONSULTATION EXERCISE

8 February 2006

<Name>
<Company>
<Street>
<Mullingar>
<Co. Westmeath>

Dear <Name>

REVIEW OF WESTMEATH RETAIL STUDY

Westmeath County Council has commissioned Roger Tym and Partners, planning and economic development consultants, to carry out a review of the Westmeath Retail Study. This study review will look at where people do their shopping at present and examine the need for further retail requirements in Athlone, Mullingar and elsewhere in the County.

As part of this review, our study approach requires us to consult with a range of interested stakeholders across County Westmeath to seek their views on a range of key issues, under the following broad headings:

- Strengths and weaknesses of Athlone and Mullingar as retail centres;
- Improvements needed to road circulation, public transport and car parking;
- Potential for additional convenience (non-food) shopping;
- Potential for additional comparison shopping; and
- Identification of potential development locations in the town centres or on the edge of the town centres.

As the results of this work will help shape future retail policy and development in County Westmeath, we would very much welcome your input and presence at a formal meeting to be held from 6.30pm on Thursday 23 February 2006, at the Civic Offices, Church Street, in Athlone. Please note that attendance is strictly by invitation only.

If you should require further information then please contact Nairn Pearson at Roger Tym and Partners by telephone on 00 44 141 332 6464 or alternatively by direct e-mail to nairn.pearson@tymconsult.com.

We warmly welcome your participation in this study and look forward to seeing you then.

Yours sincerely

Nairn Pearson
Senior Consultant

8 February 2006

<Name>
<Company>
<Street>
<Mullingar>
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As the results of this work will help shape future retail policy and development in County Westmeath, we would very much welcome your input and presence at a formal meeting to be held between 12.00-2.00pm on Thursday 23 February 2006, at the Greville Arms Hotel, Pearse Street, in Mullingar. Please note attendance is strictly by invitation only.

If you should require further information then please contact Nairn Pearson at Roger Tym and Partners by telephone on 00 44 141 332 6464 or alternatively by direct e-mail to nairn.pearson@tymconsult.com.

We warmly welcome your participation in this study and look forward to seeing you then.

Yours sincerely

Nairn Pearson
Senior Consultant

2 November 2005

Dear

WESTMEATH RETAIL STUDY

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- Strengths and weaknesses of Athlone and Mullingar as retail centres;
- Improvements needed to the road circulation, public transport and car parking provision;
- Potential for additional convenience shopping;
- Potential for additional comparison (non-food) shopping; and
- Identification of potential development locations in the town centres or on the edge of the town centres.

As the results of this work will help shape future retail policy and development in County Westmeath, we would very much appreciate if you would make available some time to provide your written comments. We look forward to receiving your reply before or no later than Friday 2 December 2005.

If you should require further information on this study then please contact Nairn Pearson at Roger Tym and Partners by telephone on 00 44 141 332 6464 or alternatively by direct e-mail to nairn.pearson@tymconsult.com.

We warmly welcome your co-operation and participation in this exercise and look forward to receiving your comments.

Yours

Nairn Pearson
Senior Consultant

Note of Mullingar Stakeholder Meeting
Held at Greville Arms Hotel, Mullingar on Thursday 23rd February at 12.00pm

Matters Discussed:

General

- Mullingar along with Athlone and Tullamore are part of the triangular linked gateway, as identified within the national spatial strategy;
- Needs to be discussion with Roscommon County Council to ensure that there is a consistent and sustainable approach to future retail strategy, especially in respect of Athlone, and similarly any implications on Tullamore (in neighbouring Co. Offaly);
- The road link to Athlone could be improved to enhance gateway town linkages;
- There is need for the future role and function of Mullingar (and Athlone) to balance / compete directly with the potential and attractiveness of other towns such as Tullamore, Longford and even to a lesser extent Roscommon town;

Mullingar

- Recognition of the population growth and thus potential of Mullingar town (and wider County) through implementation of the national spatial strategy;
- Parking in the town is seen as a significant problem, with traffic congestion and through traffic affecting the traditional part of the town centre (including Oliver Plunkett Street) at different times throughout the day;
- There is a growing requirement for a strategy to address transportation in Mullingar, including aspects of park and ride, road circulation and vehicle parking;
- There is need for continuing pedestrian and other environmental improvements;
- It is understood that the principle of a multi-storey car parking has been considered by Westmeath County Council, and recent decision taken to implement a strict two hour parking restriction on the town's main streets;
- What are the potential implications and impacts for the existing and proposed road network provision should additional retail development be permitted - given current issues;
- The town benefits from relatively central location and infrastructure - to Galway and Sligo, and is a strong retailing and business location;
- The town is an attractive place to re-locate to and live in - whilst still retaining close proximity and accessibility to Greater and Central Dublin;
- Significant potential exists in terms of achieving economic development, but this will not be realised if corresponding physical infrastructure improvements are also made;
- It is important to plan for the most appropriate scale of new retail floorspace in association with encouraging greater efficiency amongst retailers in the town. This can realistically be achieved through greater competition, larger and modern floorplates, and the creation of a critical mass of new retailing provision;
- If the Blackhall scheme should be permitted, then it is likely that this would assist in meeting the short-medium retailing requirements, and in a sustainable central town location. In the medium to long term where will additional retailing provision be accommodated?
- There is noted demand from some of the town's supermarket operators for additional retail floorspace, but one issue is where this can be accommodated - expansion or relocation?
- Lynnpark Development have received planning consent to develop site at Lynn Road for retail warehousing and has had some discussion with major retailers, incl. Argos and Homebase, who have indicated that there isn't the catchment available - especially given that they also have outlets in other towns incl. Cavan, Longford, Sligo and Tullamore - all on retail parks;
- Consideration might be favourable from planning appeal board to allow edge-of-town centre developments in the key gateway towns, where no significant town centre development or regeneration schemes are being brought forward!

Note of Athlone Stakeholder Meeting
Held at Civic Centre, Athlone on Thursday 23rd February at 6.30pm

Matters Discussed:

General

- Although Athlone and Mullingar form part of the linked gateway, the actual linkages between the two towns are currently very poor, i.e. no direct rail connection;
- Mullingar - close proximity to Central Dublin and thus commuting area - likely to experience some growth in convenience goods shopping but less so high order comparison shopping;
- Need for 'unique selling points' in both Athlone and Mullingar towns - and perhaps therefore a requirement to adopt a more specialist shopping role and focus on tourism;

Athlone

- Athlone - there is an anticipated inflow of visitors, shoppers and residents in to town once the development of critical mass and physical infrastructure is achieved, such as the new town centre development scheme and additional housing development;
- Athlone - acts a regional centre, with no overlap with Mullingar catchment;
- Athlone - need for evening economy, entertainment and leisure amenities is vitally important;
- Athlone - The Golden island Shopping centre opened in 1997, a key attraction for shoppers and visitors to the town, with ample surface parking. [It is understood that a survey of shoppers may have been undertaken on behalf of the centre owners]. The Kilmartin Centre (N6) has more bulky goods shopping provision with added attraction of free car parking;
- Market perspective - perception that site assembly, road access and servicing (and traffic management as a whole) are very important and must be addressed to entice investment;
- There perhaps requires to be a 'managed decline or contraction' approach to the future of the traditional high street as appropriate - and need for future thinking and planning on the next phasing of retail development - by identifying key sites, land assembly and implementation;
- Southern side of the town - access is important, bridge over the river. If site could be brought forward then road development could take place opening up area for development, with funds for road and infrastructure provision likely to be forthcoming from retailers and developers;
- There is huge potential to be tapped in terms of tourism and expenditure - by just looking at examples such as Carrick-on-Shannon. In particular waterfront development, with Athlone have large expanse of undeveloped potential waterfront land available, similar to the marina and Radisson hotel at present;
- There should be a pro-active approach to town centre management in Athlone, whether or not this may involve BID's style-legislation or another such approach.
- The town centre should be enhanced with appropriate scaled development (such as Gallico scheme), whilst also allowing bulk goods comparison retailing in appropriate locations outwith the town centre and of adequate scale to serve needs;

Joint Approach - Counties Roscommon & Westmeath

- Roscommon town - has benefited from new Tesco superstore and Dunnes Stores. Although the convenience provision is good, there is very little comparison shopping;
- Roscommon and Westmeath - Counter-action between the two parts of the town (in Athlone) requires to be balanced through collaboration and joint development strategy, otherwise there will be no sustainable and logical approach to future development;

APPENDIX FOUR

FLOORSPACE REQUIREMENTS

Retail Expenditure in Westmeath/Roscommon Study
Area

Present Patterns and Future Trends

APPENDIX

February 2007

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1 Introduction

This Appendix:

- Sets out the methodology for establishing the 2004 expenditure per head in retail stores for convenience and comparison goods at national, regional and study area level and bringing this forward to the Study base year of 2006¹.
- Presents population and expenditure projections for the study area
- Provides calculations of floorspace requirements

¹ **Retail store turnover** means, critically, that elements of household expenditure on retail goods other than through stores, are excluded. This is because planners and developers are concerned for the most part to estimate the extent of floorspace requirements, which will relate only to retail stores. The value of home deliveries of convenience goods is included in the calculations, however, since these items are despatched from supermarkets and are included in their turnover figures.

2 Calculation of Retail turnover in the Study Area in 2006

2.1 Steps involved

The process may be divided into the following broad steps:

1. Obtaining a baseline estimate of retail store turnover at national level for the latest year for which full data is available from the Annual Services Enquiry (2003);
2. Updating this estimate to the latest year for which relevant data are available (2004), using available secondary data, from the National Income and Expenditure tabulations, the Retail Sales Index and other sources;
3. Obtaining the latest population estimate and tourist data in order to adjust the updated expenditure figure to obtain a true turnover per head figure for the base year of 2004.
4. Customising this estimate to obtain a local figure for expenditure per head in the base year of 2004, using data from the Census of Population and the Household Budget Survey.
5. Bringing national and local estimates forward to the current year of 2006 using short term projections of consumption growth in the 2004 to 2006 period and Census of Population results for 2006;

2.2 Data Sources available for the Task

Household Budget Survey

Latest available is for the year 2000. This provides estimates of expenditure per household, for convenience and comparison goods, but more importantly, distinguishes between levels of spending for a number of social groups and for regions of the State

Annual Services Enquiry

This is a publication of the Central Statistics Office, the latest year being 2003. It is the best source of data from a baseline estimate of retail turnover.

National Income and Expenditure

This is an annual publication which contains data on retail spending, which is less useful than the ASI data for technical reasons, but which can provide an indication of trends over time. Latest available full data relate to 2003, with limited data available for 2004.

Annual estimate of population

This is published in September of each year and provides national and regional population estimates for April of the year of publication. Hence population estimates are available at national and regional level for April 2005, revised after 2006 COP results publication.

Tourism Expenditure

Estimates of tourism expenditure are obtained from information from the CSO's Country of Residence Survey (CRS) and Bord Failte's Survey of Overseas Travellers (SOT). Latest available data relates to the year 2004.

3 Calculating Retail Turnover for the State in 2003

3.1.1 Abstract data from the latest available Annual Services Enquiry

The CSO annual services enquiry provides data on **turnover** in retail establishments under the detailed categories ² set out below.

Table 1: Categories of goods sold by NACE Classification from the ASI

NACE4 (Year 2003)	Ref. No.	Description
5211	1	Retail sale in non-specialised stores with food, beverages or tobacco predominating
5212	2	Retail sale: Other retail sale in non-specialised stores
5221	3	Retail sale of fruit and vegetables
5222 – 5223	4	Retail sale of meat and meat products, fish, crustaceans and molluscs
5224	5	Retail sale of bread, cakes, flour confectionery and sugar confectionery
5225 – 227	6	Retail sale of alcoholic and other beverages, tobacco products and Other retail sale of food, beverages and tobacco in specialised stores
5231 – 5233	7	Retail sale: Dispensing chemists, sale of medical and orthopaedic goods, cosmetic and toilet articles
5241	8	Retail sale of textiles
5242	9	Retail sale of clothing
5243	10	Retail sale of footwear and leather goods
5244	11	Retail sale of furniture, lighting equipment and household articles n.e.c.
5245	12	Retail sale of electrical household appliances and radio and television goods
5246	13	Retail sale of hardware, paints and glass
5247	14	Retail sale of books, newspapers and stationery
5248	15	Retail sale: Other retail sale in specialised stores
5250	16	Retail sale of second-hand goods in stores
5261 – 5263	17	Retail sale via mail order houses, Retail sale via stalls and markets, Other non-store retail sale

3.1.2 Estimate the expenditure on comparison and convenience goods using unpublished breakdowns of the ASI available from the CSO

Previous research carried out suggests that in general, the ASI is a very accurate source for estimation of retail turnover.

For the purposes of this research, the CSO provided Table 2, set out overleaf, which cross-classifies NACE code (somewhat aggregated) by product. This facilitates a refinement of convenience and comparison sales, with the italicised items being included as convenience goods and the bolded items as comparison goods.

However, the following should be noted

- Only half of the sale of spare parts and accessories for motor vehicles has been included, since some of these sales are related to car servicing etc.
- Only one quarter of the sales under the category 'Other goods and services' has been included. The bulk of sales here are estimated to be services.

Using these adjusted data, Table 3 sets out the best estimate of turnover in convenience and comparison goods in 2003 at 2003 prices. VAT has been estimated by applying the same

² This is unpublished data obtained from the CSO

aggregate rate that was calculated from the published tables after having made a broad division into convenience and comparison goods (VAT data relating to Table 2 is not available).

Table 2: Cross Classification of NACE outlet codes with products sold (€ thousand)

	Car Trades	non-spec stores and dept stores	food, bev and tobacco	Pharm, Medical and cosmetc	Textiles and clothing	Footwear and Leather	Furniture and lighting	Electrical	Hardware paint and glass	Books, newspapers and stationery	Other retail sales	Bars	TOTAL (EXCL BARS)
Product:	NACE 50	NACE 521	NACE 522	NACE 523	NACE 5241- 5242	NACE 5243	NACE 5244	NACE 5245	NACE 5246	NACE 5247	NACE 5248	NACE 554	
Bread, Cakes & Cereals	34,834	356,243	109,851	0	6,613	0	0	0	86	385	0	73	508,011
Meat, Poultry & Game	15,384	1,870,871	412,225	0	0	0	0	0	0	29	0	0	2,298,508
Fish	1,285	268,353	45,628	0	1,593	0	0	0	0	0	0	0	316,860
Milk, Cheese & Eggs	31,183	666,720	96,439	0	0	0	0	0	0	521	722	0	795,585
Butter, Oils & Fats	10,296	203,257	4,664	0	0	0	0	0	0	35	0	0	218,252
Fresh Fruit	17,845	139,777	3,388	0	0	0	0	0	0	315	0	0	161,323
Vegetables, Potatoes & Other Tubers	5,579	636,551	7,862	0	0	0	0	0	0	0	0	0	649,992
Sugar, Jams, Chocolate & Sugar Confectionery	60,921	388,762	13,928	0	0	0	0	0	0	6,594	12,803	23,861	483,008
Other Food Products	57,777	3,163,218	59,494	5,672	136	0	0	0	0	1,037	0	490,376	3,287,335
Coffee, Tea & Cocoa	18,372	116,752	9,194	0	0	0	0	0	0	95	1,678	3,292	146,091
Mineral Waters, Soft Drinks & Juices	49,407	436,671	34,158	0	55	0	0	0	0	2,364	0	285,599	522,655
Alcoholic Beverages	24,355	301,637	261,816	0	86	0	0	0	0	0	0	2,351,357	587,895
Tobacco	148,957	728,770	33,319	0	0	0	0	0	0	15,000	6,734	72,621	932,781
Clothing	432	117,800	0	0	1,422,198	50,755	50,612	40,084	0	0	218,089	0	1,899,970
Footwear	0	4,466	0	0	75,880	175,734	0	7,032	1,493	0	121,581	0	386,186
Goods for Household Decoration & Minor Repair	9,601	15,917	0	0	9,256	98	134,269	10,807	416,797	0	21,046	0	617,789
Household Textiles, Curtains, etc.	131	275	0	0	66,407	0	44,341	7,736	45,801	0	15,009	0	179,699
Furniture, Carpets & Other Floor Coverings	0	0	33	0	407	0	217,342	8,288	77,527	0	203,080	0	506,677
Heating, Cooking, Refrigeration & Washing	0	439	0	0	26,110	0	2,662	117,263	67,271	0	15,444	0	229,189
Glassware, Tableware & Household Utensils	0	7,714	295	0	329	0	54,581	703	45,207	510	35,034	0	144,373
Household & Garden Tools & Equipment	0	5,716	0	0	0	0	52,108	1,406	63,357	0	19,902	0	142,488
Non-durable Household Goods (not for personal)	11,583	206,184	9,577	0	6,350	0	0	0	131	298	21,508	101	255,630
Medical Products, Appliances & Equipment	0	20,988	64,504	946,514	0	0	0	0	0	0	49,616	0	1,081,623
New & Second H&M Motor Cars	9,578,999	0	2,408	0	0	0	0	0	0	0	0	0	9,581,407
Other Motor Vehicles	968,326	0	0	0	0	0	0	0	0	0	0	0	968,326
Bicycles	0	0	0	0	0	0	0	703	0	0	10,589	0	11,293
Domestic Heating Oil	158,452	0	0	0	0	0	0	0	1,173	0	144,942	0	304,567
Domestic Liquid Gas	51,814	20,178	473	0	0	0	0	0	3,749	68	10,396	0	86,678
Solid Fuels	19,093	28,942	2,679	0	0	0	0	0	10,775	29	6,988	0	68,506
Petrol & Other Fuels & Lubricants	1,155,196	176,501	0	0	0	0	0	0	3,321	0	7,731	8,039	1,342,749
Maintenance & Repair of Motor Vehicles	489,661	0	33	0	0	0	0	0	0	0	0	0	489,694
Spare Parts & Accessories for Motor Vehicles	1,178,912	0	0	0	0	0	0	0	0	0	20,518	0	1,199,431
Audiovisual, Photographic & Data Processing	375	0	0	20,411	0	0	198	321,105	0	19,686	60,421	0	422,197
Other Major Durables	0	0	0	63	0	0	1,393	20,928	25,097	87,451	8,717	0	143,649
Other Games & Sports Equipment, Flowers, Toys & Newspapers, Books & Stationery	2,639	15,136	594	0	0	18,797	0	22,367	9,549	2,511	414,552	0	486,145
Products, Articles & Appliances for Personal Care	33,429	277,642	8,466	227	0	0	0	0	1,883	336,815	21,432	3,990	679,893
Other Goods & Services	8,029	124,181	6,502	448,158	0	52	0	1,406	0	114	17,223	0	605,667
	524,336	352,976	110,419	285,430	108,647	5,443	104,591	427,298	454,394	54,379	1,429,372	129,421	3,857,286
Sum	14,667,204	10,652,638	1,297,947	1,706,477	1,724,067	250,879	662,097	987,127	1,227,611	528,234	2,895,128	3,368,730	36,599,409

Source: unpublished data provided by the CSO

Table 3: Retail Turnover derived from the Annual Services Enquiry - 2003

Category	2003 Prices		
	Turnover excl. VAT (€000)	VAT on Turnover (€000)	Total turnover
Convenience (note 1)	10,908,297	1,019,761	11,928,058
Comparison	9,366,764	1,414,400	10,781,164
Total	20,275,061	2,472,259	22,747,319

Source: CSO *Annual Services Enquiry*, 2003 – Derived from unpublished data obtained from the CSO. See text and Table 2 for an explanation of the elements which comprise convenience and comparison goods from this source.

It should be noted that the definition of convenience and comparison goods varies somewhat from some definitions used in the UK, for example.

The *Retail Planner* briefing note defines convenience goods as comprising food and non-alcoholic drinks, tobacco, alcohol, newspapers and 90 per cent of non-durable household goods. In this work, newspapers are linked to books and treated as comparison goods and all non-durable household goods are classed as comparison goods.

It should also be noted that products, articles & appliances for personal care sold in chemists shops are also treated as comparison goods.

3.1.3 Comparison with NIE data

Data have also been assembled from National Income and Expenditure tabulations, with unpublished data facilitating a finer breakdown of the categories of final consumption published each year. The results show a very good match on the comparison goods side, with spending estimated at €9,395 million in 2003 at 2003 prices, excluding VAT. This is within 0.2% of the estimate obtained from the ASI.

Results are less encouraging on the convenience goods side, with the NIE estimate at €6,872 million, compared to €10,908 from the ASI data. A number of explanations may be offered for this anomaly:

1. NIE data includes only spending from own resources (e.g. excludes food subsidies)
2. NIE data includes final consumption, whereas there are elements of sales to offices, other traders, restaurants etc. included in the ASI data.

For these reasons, the ASI data are to be preferred, as they give a more accurate account of sales in the retail sector. The implicit assumption, when using population to project the floorspace requirements, is that the relationship between household final demand and overall retail sales, is a stable one.

4 Establishing Expenditure at State level to 2004 (base year)

4.1 Updating the retail store turnover figure

4.1.1 Approach One: Use the Index of Retail Sales

The index of retail sales, in volume terms, is available in published form, under the following categories of relevance:

1. Non-specialised stores - NACE 52.11 (excluding Department Stores)
2. Department Stores (NACE 52.12)
3. Specialised Stores (NACE 52 (remainder) - food beverages and tobacco)
4. Pharmaceutical, Medical and Cosmetic articles
5. Textiles and clothing
6. Footwear and Leather
7. Furniture and Lighting
8. Electrical goods
9. Hardware, paints and glass
10. Books, newspaper and stationery
11. Other retail sales

These categories broadly relate to the Annual Services Enquiry, which can thus be used to provide the base weighting required for updating.

The updating should be from the annual index number for 2003, to the annual index number for 2004, in volume terms, initially Table 4).

Table 4: Estimated turnover changes using 2003 ASI base weights and RSI growth factors to 2004 (volume index).

Category of Business 2000=100	2003	2004	% Increase
Non-specialised Stores (excl Dept Stores)	108.8	113.6	4.4
Department Stores	121.3	126.3	4.1
Food Beverages and Tobacco	100.1	101.2	1.1
Pharmaceutical Medical and Cosmetic articles	117.2	122.3	4.4
Textiles and Clothing	129.2	139.6	8.0
Footwear and Leather	129.4	137.4	6.2
Furniture and lighting	100.3	106	5.7
Electrical goods	114.6	114.6	0.0
Hardware, paints and glass	111.1	120.8	8.7
Books, newspapers and stationary	103.3	102.7	-0.6
Other retail goods	105.5	108.2	2.6
Convenience			4.0
Comparison			4.4

Source: Index numbers from RSI series; base weights from ASI

Notes: Convenience comprises items 1 and 3 and 20% of item 2. Comparison comprises remainder.

Forecourt sales where petrol does not predominate, not added.

4.1.2 Approach Two: Use the National Income and Expenditure Data

Expenditure on convenience and comparison goods may be derived from Table 14 of the National Income and Expenditure accounts, which sets out consumption of personal income (except taxes on personal income and wealth) at constant market prices.

A more detailed, unpublished, breakdown of Table 14 was obtained from the CSO, comprising the following elements:

Food and non-alcoholic beverages

Food

Non-alcoholic beverages

Alcoholic beverages, tobacco and narcotics

Alcoholic beverages

Tobacco

Narcotics

Clothing and footwear

Clothing

Footwear

Housing, water, electricity, gas and other fuels

Actual rentals for housing

Imputed rentals for housing

Maintenance and repair of the dwelling

Water supply and miscellaneous services relating to the dwelling

Electricity, gas and other fuels

Furnishings, households equipment and routine maintenance of the house

Furniture and furnishings, carpets and other floor coverings

Household textiles

Household appliances

Glassware, tableware and household utensils

Tools and equipment for house and garden

Goods and services for routine household maintenance

Health

Medical products, appliances and equipment

Out-patient services

Hospital services

Transport

Purchase of vehicles

Operation of personal transport equipment

Transport services

Communications

Communications

Recreation and culture

Audio-visual, photographic and information processing equipment

Other major durables for recreation and culture

Other recreational items and equipment, gardens and pets

Recreational and cultural services

Newspapers, books and stationery

Package holidays

Education

Education

Restaurants and hotels

Catering services

Accommodation services

Miscellaneous goods and services

Personal care

Prostitution

Personal effects n. e. c.

Social protection

Insurance

Financial services n. e. c.

Other services n. e. c.

FISIM

Total

From this listing, the following estimate may be made of convenience and comparison goods categories:

Convenience Goods

Food
 Non-alcoholic beverages
 Alcoholic beverages
 Tobacco
 Narcotics

Comparison Goods (goods only)

Clothing
 Footwear
 Furniture and furnishings, carpets and other floor coverings
 Household textiles
 Household appliances
 Glassware, tableware and household utensils
 Tools and equipment for house and garden
 Medical products, appliances and equipment
 Audio-visual, photographic and information processing equipment
 Other major durables for recreation and culture
 Other recreational items and equipment, gardens and pets
 Newspapers, books and stationery

Comparison goods (mixed goods and services)

Goods and services for routine household maintenance
 Personal care
 Personal effects n. e. c.

Further unpublished data from the CSO enabled a refinement of the last category to eliminate the service (rather than goods) elements. Data was also used from Table 2 to eliminate sales of drink and tobacco in bars. .

With these adjustments, the following volume changes may be observed in the period 2003 to 2004, and compared with the ASI changes. Again, the comparison goods figures are close, but there is some considerable discrepancy between the convenience goods figures.

Table 5: Volume changes in retail turnover/expenditure (€ millions), 2003 to 2004

Category	2003	2004	% Change NIE	% Change ASI/RSI
Convenience	6,872	7,030	2.30	4.05
Comparison	9,395	9,816	4.48	4.54

Similar calculations are possible for the longer period, 2000 to 2004, and these are set out in Table 6 below. Examination of the two figures over the longer period 2000 to 2004 is set out below.

Table 6: Annual volume changes in retail turnover/expenditure (millions of Euros), 2000 to 2004

Category	% Change NIE	% Change ASI/RSI
Convenience	1.1	2.9
Comparison	5.1	4.5

4.1.3 Comparison of the performance of the alternative methods for updating from 2003 to 2004

Table 7 below compares the outcomes of the two methods and shows a broad correspondence between them. However, because the RSI can be obtained for a more recent period, it is the method to be preferred.

Table 7: Performance of alternative methods of up-dating retail spending for the period 2003-2004

Category of Turnover	% Change over period 2003-04 at constant prices	
	NIE	RSI
Convenience	1.1	2.9
Comparison	5.1	4.5

The two data sources are largely in agreement for the growth of comparison goods, but do not agree on the growth of convenience goods. Since population is estimated to have grown by 1.63 per cent in the year in question, the NIE growth in spend, at 1.1, implies a fall in spend per head. With a rapidly growing population and prosperous economy, it seems unlikely that there was no increase in the volume of food and drink sold per head. Thus the RSI figure is to be preferred, since this would give a per capita growth of about 1.3 per cent, close to the average of 1.1 per cent recorded for the period 1995 to 2004 in the longer run NIE data. Overall, therefore, it seems better to choose the RSI data for both convenience and comparison goods.

Having made, this decision, the 2004 figures should be translated into 2004 prices, by using the value index change from 2003 to 2004, instead of the volume index. This is set below.

Table 8: Retail Turnover derived from the Annual Services Enquiry in 2003 updated to 2004 turnover at 2004 prices using RSI data

Category	2004 Prices		
	2004 Turnover excl. VAT (€000)	2004 VAT on Turnover (€000)	2004 Total turnover
Convenience	11,413,579	1,066,997	12,480,576
Comparison	9,800,402	1,479,880	11,280,282
Total	21,213,980	2,546,877	23,760,857

4.2 Estimate the population for the year in question

The next step is to estimate the population in the year in question -2004

Here, a distinction should technically be made between the *de facto* population and the normally resident population, and between private and all households.

The CSO estimate for the *de facto* State population in 2004 was 4,043,800. This has been revised after the publication of the 2006 COP, and a figure of 4,076,064 is used here.

4.3 Estimate the level of tourist expenditure in the year

Details of expenditure obtained from the ASI, and indeed from Table 14 of the National Income Accounts, include expenditure within the State by non-residents.

Estimates of tourism expenditure are obtained from information from the CSO's Country of Residence Survey (CRS) and Bord Failte's Survey of Overseas Travellers (SOT). Latest available data relates to the year 2004.

This data is available for different markets, but at national level, the totals are all that is required.

Table 9 below sets out the position for the year 2004

Table 9: Estimate of Tourist spending in the Year 2004 in 2004 Prices

Category of expenditure	€m at 2004 prices
Bed and Board	991
Other food and drink	1,265
Sightseeing/entertainment	137
Internal transport	308
Shopping	547
Miscellaneous	171
Total	3,418

A breakdown of retail expenditure of tourists between comparison and convenience spending is not available directly. Eighty per cent of this retail expenditure is allocated to comparison spending³, since this is dominant in tourists' expenditure patterns. In 2004 price terms, therefore, the shopping element of €547m may be divided into €437.6m on comparison goods and the balance of €109.4 on convenience goods.

4.4 Estimate the extent of retail spending not made by the final consumption sector

In calculating the turnover of shops, it must be recognized that there is an element of expenditure which will be business to business.

Either this can be removed, to give a true picture of how much was actually household expenditure, or left, on the assumption that there is a reasonably stable relationship between household and business expenditure in shops, or that the latter is very small.

One possible method of removing the business to business element may be through the use of national input-output tables. This has not been investigated in this study.

As indicated earlier in this appendix, it is assumed that the relationship is a stable one. Projections of turnover per head used for calculations of floorspace requirements therefore implicitly include business to business sales.

³ Following established practice in the Retail Planning Guidelines

4.5 Estimates of turnover per head of resident (de facto) population, excluding tourists, for 2004

Table 10: Estimates of turnover per head for 2004

Category of Turnover	(€000) 2004 prices				Per Capita expenditure in Irish shops 2004 (€)
	2004 Turnover incl. VAT	Tourist spending	Net of tourism turnover	April 2004 de facto population	
Convenience	12,480,576	437,520	12,043,056	4,076,064	2,955
Comparison	11,280,282	109,380	11,170,902	4,076,064	2,741
Total	23,760,857	546,900	23,213,957	4,076,064	5,695

5 Updating expenditure at State level to 2006

5.1 Projecting consumption

This process involves examination of short run forecasts;

Two main sources are available:

- Department of finance, review and outlook 2005 (Prn A5/1026)
- The ESRI Medium Term review

The Department of Finance Review and Outlook forecasts personal consumption growth of 5.0 per cent in 2005 and the ESRI MTR agrees.

For 2006, the MTR forecasts a growth in consumption in volume terms in 2006 of 3.7 per cent.

5.2 Relating retail spending to consumption growth

The relationship of convenience and comparison spending to consumption changes has then to be assessed. This is set out in Table 11 below:

Table 11: relationship of growth in consumption to retail spending

Period	Convenience	Comparison
1995-2004	40.0%	161.3%
2000-2004	30.6%	140.9%

Source: NIE unpublished data

Table 11 effectively sets out a pseudo income elasticity calculation for convenience and comparison goods, on the assumption that there is a linear relationship between income and overall consumption. If overall consumption rose by 10 per cent between (say) 1995 and 2004, then convenience spending would rise by 4 per cent, and comparison spending by 16.1 per cent (first line of Table 11)

Table 11 appears to show declining income elasticity in the later period. However, the slowing of the economy in 2001 may have distorted the picture, and on balance it is preferable to retain the relationship established over the longer period 1995 to 2004. Indeed, for convenience goods, a pseudo-elasticity of 60% has been adopted after 2006 in order to make the projections more robust

On this basis, the following results are obtained.

Table 12: Indices of aggregate expenditure growth at State level 2004 to 2006

Category	2004	2005	2006
Consumption	100.0	105.0	108.9
Convenience	100.0	102.5	104.4
Comparison	100.0	106.3	111.1

Table 13, below, shows a flat trend in convenience spending per head, which may be associated with record levels of immigration of workers with low income and consumption patterns.

Table 13: Growth in per capita spending at 2004 prices in the State between 2004 and 2006

Category	2004	2005	2006
Convenience (€000)	12,043	12,344	12,573
Comparison (€000)	11,171	11,875	12,411
Population (000)	4,076	4,155	4,235
<i>Spend per head</i>			
Convenience	2,955	2,971	2,969
Comparison	2,741	2,858	2,931

6 Base Year Spending Estimate for the Study Area

Having established the national per capita expenditure levels in the base year (2004) and the current year (2006), it is now necessary to calculate the equivalent figures for the study area, which comprises the County of Westmeath, together with South Roscommon within the immediate catchment of Athlone⁴. These figures will diverge from those established at the national level for a number of reasons:

- Differences in average income levels between the Study Area and the State;
- Differences in income distribution between the Study Area and the State;
- Differences in the extent of tourism expenditure.

6.1 Data required

Data is required on

- Population levels
- Relative income levels of the resident population
- The number of tourists visiting the area

6.2 Population of the Study Area in the Base Year

The latest available data relates to the 2006 Census of Population.

The population of the study area is recorded as follows:

Table 14: Population of the zones of the Study area 1996-2006

Zones	1996 Persons	2002 Persons	2006 Persons	Change 1996- 2002	Change 2002- 2006	Estimated 2004 Persons
Centre	24,900	29,354	32,674	4,454	3,320	31,014
Of which:						
Mullingar and environs	12,787	15,836	18,529	3,049	2,693	17,183
Remainder	12,113	13,518	14,145	1,405	627	13,832
East	4,894	6,453	8,293	1,559	1,840	7,373
North	5,354	5,561	6,251	207	690	5,906
South	4,217	5,190	5,737	973	547	5,464
West	31,737	34,089	36,644	2,352	2,555	35,367
Of which:						
Athlone *	17,199	18,185	17,125	986	-1,060	17,655
Remainder *	14,538	15,904	19,519	1,366	3,615	17,712
TOTAL	71,102	80,647	89,599	9,545	8,952	85,123

Source: COP * Including areas in County Roscommon

⁴ The catchment of Athlone extends further into Roscommon than the area defined here, and also includes parts of Counties Galway, Longford and Offaly. The contribution of expenditure in Athlone from these areas outside the immediate catchment has been dealt with by way of inflow adjustments in section 7.

6.3 Estimation of the expenditure per head within the Study Area

Personal/household incomes by regions and counties are published by the CSO. The latest year for which this is available is 2002

The pattern of income is as set out in Table 16

Table 16: Disposable income per head (State=100)

County	1995	1996	1997	1998	1999	2000	2001	2002
Midland	90.3	89.7	91.0	89.4	88.2	88.4	89.3	92.1
Laois	88.3	87.3	88.7	89.0	86.9	87.3	87.5	89.8
Longford	90.4	91.4	92.5	89.1	88.1	87.4	89.5	95.1
Offaly	85.9	86.0	86.1	84.5	84.3	84.9	86.1	90.2
Westmeath	96.1	94.3	96.6	94.6	92.9	93.2	93.6	94.3
Roscommon	84.7	85.9	86.0	86.5	87.8	88.2	90.7	91.6

There is no strong trend in the relationship of income in Westmeath and the State in the period 1995 to 2002. Roscommon income appears to be approaching the State.

In the absence of a clear trend, it is wise to accept the latest Westmeath figure of 94.3 and assume this applies to the whole study area, since the portion of Roscommon included in the study area is likely to be the most prosperous area of the County.

What is of greatest importance, is the relationship between the County and the Region, since expenditure data is available for the Region, and will provide the starting point for an adjustment of the Study area expenditure. Study area income in 2002 was 102.4 of the Regional index of 100.

Below the County Level, the only method of obtaining an estimate of differential income levels is to use social groups in the COP and relate these to income levels as set out in the Household Budget survey. This can in fact be achieved directly from the State to the Study area, assuming the *shift* effect within social groups (arising from differential salary levels for the same job in different locations) is small compared to the *share* effects of the make-up of the households between social groups.

Table 17 gives an index number for the Study Area in relation to the State which is higher than that obtained by looking at income data. This may be partly because of the *shift* effect referred to above and partly because of the relatively income inelastic nature of expenditure on convenience goods. Expenditure data is also available for the region direct from the HBS and this is also set out in Table 16, labelled Region (2).. This indeed shows a strong shift effect. Also the population of the Region rose rapidly between 2000 and 2002 with Dublin overspill, and this will have changed the social structure.

Table 17: Index numbers of expenditure per head, based on COP data on social group composition and HBS data on expenditure by social group

Area	Convenience	Comparison
Centre	100.3	100.6
East	98.8	95.5
North	95.6	90.7
South	99.0	96.9
West	99.5	99.6
Study Area	99.5	98.9
Region (1)	98.4	96.5
Region (2)	103.1	86.8
State	100.0	100.0
Study area to Region	101.1	102.5

On balance, the more recently derived COP related data are preferred and these give results close to the State average. The index of the Study area to the region in the HBS spending is, for comparison goods, identical to that of income.

Assuming these relationships still hold in 2004 and 2006, the following spend per head figures may be calculated for the zones as follows:

Table 18: Expenditure per head, 2004 and 2006

Area	2004		2006	
	Convenience	Comparison	Convenience	Comparison
Centre	2,964.3	2,756.0	2978.7	2947.0
East	2,917.9	2,618.3	2932.1	2799.8
North	2,823.2	2,487.0	2836.9	2659.4
South	2,925.7	2,656.0	2939.9	2840.1
West	2,938.8	2,729.4	2953.0	2918.6
State	2,954.6	2,740.6	2968.9	2930.6
Study Area	2,940.0	2,711.1	2954.2	2899.0
Region	2,907.8	2,645.1	2921.9	2828.5

7 Projection of Expenditure in the Study Area

7.1 Projection of expenditure per head at State level

This follows the projection of consumption in the ESRI Medium Term Review (MTR) 5 High Growth Model to 2015, and then extends the projections based on the 2010 to 2015 trend. The High Growth model is preferred because it is more likely in the shorter term and from a planning perspective, will provide a scenario which will facilitate more robust planning decisions in terms of making adequate retailing provision. For the period 2016 to 2021, where the outlook is much less certain, a high figure of 4.7 is used, again for the purpose of providing a robust planning environment. This figure is also intended to reflect the impact of critical mass as the Gateways mature.

The growth of convenience spending is set at 60 per cent of the growth of overall consumption, and comparison set at 160 per cent of the same. The resultant figures are set out below, in Table 19.

Table 19: Projected Growth of Expenditure per Head at National Level (€ at 2004 prices)

Element	2004	2005	2006	2007	2008	2009	2010	2011	2012
Rate (%) High		5.2	5	3.7	3.5	3.3	4.7	4.1	3.7
Convenience	12043	12344	12,573	12,844	13,106	13,359	13,725	14,053	14,356
Comparison	11171	11875	12,411	13,146	13,882	14,615	15,714	16,745	17,736
Consumption	67,733	71,255	74,818	77,586	80,302	82,952	86,850	90,411	93,756
Population	4,076	4,155	4,235	4,313	4,391	4,469	4,548	4,626	4,686
Conven % grow		2.5	1.9	2.2	2.0	1.9	2.7	2.4	2.2
Comp % grow		6.3	4.5	5.9	5.6	5.3	7.5	6.6	5.9
Cons % grow		5.2	5.0	3.7	3.5	3.3	4.7	4.1	3.7
Convenience PH	2,955	2,971	2,969	2,978	2,985	2,989	3,018	3,038	3,064
Compar PH	2,741	2,858	2,931	3,048	3,161	3,270	3,455	3,620	3,785
Consum PH	16,617	17,147	17,667	17,989	18,287	18,560	19,098	19,544	20,008

Element	2013	2014	2015	2016	2017	2018	2019	2020	2021
Rate (%) High	3.7	3.7	3.7	4.7	4.7	4.7	4.7	4.7	4.7
Convenience	14,666	14,982	15,305	15,725	16,156	16,598	17,053	17,521	18,001
Comparison	18,786	19,898	21,076	22,661	24,365	26,197	28,167	30,286	32,563
Consumption	97,225	100,823	104,553	109,467	114,612	119,999	125,639	131,544	137,726
Population	4,746	4,806	4,866	4,926	4,986	5,046	5,106	5,166	5,226
Conven % grow	2.2	2.2	2.2	2.7	2.7	2.7	2.7	2.7	2.7
Comp % grow	5.9	5.9	5.9	7.5	7.5	7.5	7.5	7.5	7.5
Cons % grow	3.7	3.7	3.7	4.7	4.7	4.7	4.7	4.7	4.7
Convenience PH	3,090	3,117	3,145	3,192	3,240	3,289	3,340	3,392	3,444
Compar PH	3,958	4,140	4,331	4,600	4,887	5,192	5,517	5,863	6,231
Consum PH	20,486	20,979	21,487	22,223	22,987	23,781	24,606	25,464	26,354

⁵ Fitzgerald et al *Medium Term Review 2005 – 2012*, Economic and Social Research Institute, December 2005

The results from Table 19 are summarised below in Table 20:

Table 20: Summary of spending growth at State level (Average annual growth rates in spending per head at constant prices) and comparison with UK data

	2006-2011	2011-2016	2016-2021	2004-2008	UK 2003-2008	2004-2013	UK 2003-2013
Convenience	0.6%	1.1%	1.7%	0.3%	0.5%	0.6%	0.8%
Comparison	4.3%	4.9%	6.2%	3.6%	4.0%	4.1%	3.5%
Consumption	2.0%	2.6%	3.5%	2.4%	2.1%	2.3%	2.1%

In Table 20 a comparison is made with UK projections. From this comparison, it is clear that total consumption growth is similar over the period 2003/4 to 2013, convenience goods growth is somewhat less in Ireland but comparison goods growth is higher (after 2008). It may be that the rapid immigration into Ireland is impacting on spending per head on convenience goods. Certainly the MTR suggests that consumption will contribute less to growth and points out that GDP per head growth rates will fall sharply. The level and character of immigration may well be a significant factor in determining expenditure patterns in the period ahead.

It is assumed that these growth rates will also apply in the Study Area.

7.2 Population Projections for the Study Area

The population projections set out below are based on the NSS and the role of the two main towns of the County. They are in agreement with projections used in the 2007 County Development Plan review..

Table 21: Population Projections

Zones	2006	2011	2016	2021
Centre	32,674	38,140	44,741	52,798
Of which:				
Mullingar and environs	18,529	22,622	27,679	33,977
Remainder	14,145	15,518	17,062	18,821
East	8,293	9,098	10,003	11,035
North	6,251	6,858	7,540	8,318
South	5,737	6,294	6,920	7,634
West	36,644	41,977	48,453	56,414
Of which:				
Athlone	19,387	23,721	29,090	35,793
Remainder	17,257	18,256	19,364	20,621
TOTAL	89,599	102,366	117,657	136,197

Sources: 2006, COP: 2011-2021, consultant's projections

7.3 Projection of Aggregate Expenditure by Study Area residents

Table 22: Growth of Aggregate Expenditure by Study Area residents to 2021 (€ at 2004 prices)

Year	Convenience Goods		Total spend	Comparison Goods		Total spend
	Weighted spend ph	Popn		Weighted spend ph	Popn	
2006						
Mullingar	2978.7	18,529	55,191,928	2947.04	18,529	54,605,656
Remainder centre	2978.7	14,145	42,133,403	2947.04	14,145	41,685,844
East	2932.1	8,293	24,315,512	2799.76	8,293	23,218,398
North	2836.9	6,251	17,733,225	2659.37	6,251	16,623,723
South	2939.9	5,737	16,866,159	2840.07	5,737	16,293,496
Athlone	2953.0	19,387	57,249,218	2918.64	19,387	56,583,752
Remainder West	2953.0	17,257	50,959,393	2918.64	17,257	50,367,041
Study Area	2951.5	89,599	264,448,838	2894.9	89,599	259,377,910
2011						
Mullingar	3047.85	22,622	68,948,605	3640.04	22,622	82,345,133
Remainder centre	3047.85	15,518	47,295,957	3640.04	15,518	56,485,434
East	3000.14	9,098	27,294,862	3458.13	9,098	31,461,550
North	2902.74	6,858	19,906,055	3284.72	6,858	22,525,589
South	3008.16	6,294	18,932,749	3507.92	6,294	22,078,124
Athlone	3021.54	23,721	71,674,722	3604.97	23,721	85,514,268
Remainder West	3021.54	18,256	55,160,381	3604.97	18,256	65,811,203
Study Area	3020.7	102,366	309,213,331	3577.6	102,366	366,221,301
2016						
Mullingar	3202.77	27,679	88,649,777	4626.15	27,679	128,047,794
Remainder centre	3202.77	17,062	54,644,190	4626.15	17,062	78,929,336
East	3152.63	10,003	31,535,584	4394.96	10,003	43,962,471
North	3050.28	7,540	22,998,800	4174.58	7,540	31,475,899
South	3161.06	6,920	21,874,275	4458.24	6,920	30,850,637
Athlone	3175.12	29,090	92,362,820	4581.58	29,090	133,275,940
Remainder West	3175.12	19,364	61,481,793	4581.58	19,364	88,715,825
Study Area	3174.9	117,657	373,547,238	4549.3	117,657	535,257,901
2021						
Mullingar	3455.87	33,977	117,419,739	6266.03	33,977	212,900,160
Remainder centre	3455.87	18,821	65,043,762	6266.03	18,821	117,934,408
East	3401.78	11,035	37,537,257	5952.89	11,035	65,687,718
North	3291.34	8,318	27,375,801	5654.39	8,318	47,030,568
South	3410.87	7,634	26,037,262	6038.60	7,634	46,096,316
Athlone	3426.05	35,793	122,627,641	6205.66	35,793	222,117,803
Remainder West	3426.05	20,621	70,647,715	6205.66	20,621	127,965,563
Study Area	3426.6	136,197	466,689,178	6165.6	136,197	839,732,535

Table 22 indicates that over the period to 2021, expenditure by study area residents at 2004 prices will rise from €264 million to €467 million for convenience goods and from €259 million to €840 million for comparison goods.

7.4 Addition of Inflow from outside the Study Area

There is a significant *inflow* of expenditure to Athlone from Counties Galway and Offaly as well as that part of County Roscommon not within the Study Area. There are smaller inflows to Mullingar. The level of these inflows has been estimated using the shoppers' surveys conducted in October and November 2005. It is estimated that these amount to €26m and €49m for convenience and comparison goods respectively in Athlone. The equivalent figures for Mullingar are €10m and €17m.

Tourism Spending

In addition to the aggregate spending set out in Table 22 above, tourism spending must be added. It has been calculated by Failte Ireland ⁶ that €35 million of revenue accrued to County Westmeath from tourism activity in 2004. If national proportions apply, then 15.2 per cent will be on shopping, of which 80 per cent is estimated to be on comparison goods – a total of €4.27 million in 2004.

⁶ Failte Ireland – Tourism Facts 2004 – Midlands East Region

Allocation of Study Area Expenditure to Shopping Locations and Consequent Floorspace Requirement

7.5 Base Year Spending Allocation

Surveys conducted by a previous study form the basis for Tables 20 and 21, which set out the expenditure patterns for the base year of 2004 as well as the current year of 2006.

Table 23, convenience spending, assumes that 80 per cent of the spend is on the main shop and 20 per cent on top-up shopping. All top-up shopping is assumed to take place within the zone, or, in the case of Rest of Centre and Rest of West, Mullingar and Athlone.

Table 24, covers pure comparison and bulky goods. It is assumed that 75 per cent of expenditure is on pure comparison. Separate survey data was available for the two types of goods and they have been combined in these ratios.

Table 23: Allocation of Convenience Spend – 2004/2006 (percent – columns add to 100)

Spend from ->	Survey Area	Mullingar	Other Centre	East	North	South	Athlone	Other West
<i>Destination:</i>								
Mullingar	43.3	96.5	74.1	46.1	50.2	41.0	0.7	5.1
Rest of Centre	3.4		20.0		1.3			
East	3.8	0.7	0.7	37.0	3.2	3.1		
North	2.1				28.3		1.3	
South	1.9		1.5			24.1		
Athlone	33.6	2.1	3.0	1.2	2.5	5.1	98.0	55.2
Rest of West	7.4	0.7						37.5
Leakages	4.6		0.7	15.8	14.6	26.7		2.1

Table 24a: Allocation of Comparison Spend – 2004/2006 (percent – columns add to 100)

Spend from ->	Survey Area	Mullingar	Other Centre	East	North	South	Athlone	Other West
<i>Destination:</i>								
Mullingar	45.0	70.3	68.8	55.8	69.6	48.7	0.5	1.6
Rest of Centre	-	-	-	-	-	-	-	-
East	-	-	-	-	-	-	-	-
North	-	-	-	-	-	-	-	-
South	-	-	-	-	-	-	-	-
Athlone	25.6	8.7	6.7	2.8	2.8	8.6	78.7	71.1
Rest of West	0.8	-	0.2	-	-	-	-	5.1
Leakages	28.6	21.0	24.3	41.3	27.7	42.7	20.8	22.3

It is assumed that the convenience allocations remain unchanged throughout the projection period. For comparison goods, some recovery of leakage is assumed. Tourism spending is associated with activity on the river Shannon, this total has been allocated to the Athlone area. Other inflows to Athlone have been increased, reflecting the increased scale and range of shopping likely to become available; a similar trend in Mullingar is reflected in the leakage reduction. The share of non-shop retail sales is increased. All these trends are applied linearly, with the resultant 2021 shares shown in Table 24b.

Table 24b: Allocation of Comparison Spend – 2021 (percent – columns add to 100)

Spend from ->	Survey Area	Mullingar	Other Centre	East	North	South	Athlone	Other West
<i>Destination:</i>								
Mullingar	39.8	74.5	71.8	75.2	76.0	67.2	0.5	1.6
Rest of Centre	-	-	-	-	-	-	-	-
East	-	-	-	-	-	-	-	-
North	-	-	-	-	-	-	-	-
South	-	-	-	-	-	-	-	-
Athlone	44.1	9.3	7.0	3.8	3.0	11.9	81.5	72.3
Rest of West	0.7	-	0.2	-	-	-	-	5.2
Leakages	10.6	10.3	15.0	15.0	15.0	15.0	12.0	15.0
Other/mail order	4.8	6.0	6.0	6.0	6.0	6.0	6.0	6.0

7.6 Floorspace in 2006

Table 25 presents the floorspace data for 2006, in square metres

Table 25: Floorspace 2006 (square metres net sales space)

Data	Convenience	Comparison	Bulky	Vacant	Total
Mullingar	7,568	9,931	12,294	2,736	32,528
Centre	574	50	2,805	59	3,488
East	1,898	786	-	206	2,890
North	575	133	-	15	723
South	797	333	115	1,122	2,367
Athlone	10,226	12,312	8,773	5,330	36,640
West	1,408	791	405	103	2,707
Unknown	248	-	-	-	248
Total	23,294	24,336	24,392	9,570	81,592

Note: Bulky goods categories refers only to sales of these goods in modern retail warehousing units

Table 26 indicated the derived turnover figures, based on the expenditure calculations and the spending allocations, including leakages. The figures also include tourism spend and other inflows.

Table 26: Derived Turnover per Square Metre (2004 prices)

a. Convenience Goods

Area	Net floorspace	2006	
		Total turnover (€m)	Euros per sq metre
Mullingar and Centre	8,142	134.6	16,531
Athlone and West	11,633	135.3	11,629
Rest of Study Area	3,270	21.2	6,494

b. Comparison Goods

<i>Area</i>	<i>Net floorspace</i>	<i>2006</i>	
		<i>Total turnover (€m)</i>	<i>Euros per sq metre</i>
Mullingar and Centre	25,080	117.6	4,689
Athlone and West	22,281	145.9	6,549

Examination of the derived turnover per square metre in Mullingar and Athlone in 2006 indicates that there is a shortage of convenience floorspace in Mullingar. An allowance for correction of this shortage has been incorporated into the projections of required floorspace. We estimate the shortfall to be in the range 2,500 to 3,000 square metres. There is also a higher figure for comparison turnover in Athlone, compared with Mullingar, an indication both of the wide draw of Athlone for comparison goods shopping and the high level of leakages from the East of County Westmeath to Dublin and elsewhere.

7.7 Required Floorspace to 2021 - Summary**7.7.1 Assumptions**

- Market shares remain unchanged, excluding some leakage recovery of comparison goods (see below), and the special treatment of Athlone, as described above;
- Gross inflows assumed to remain as a constant proportion of total turnover of the centres, with the exception of comparison goods in Athlone, where a rapidly growing Gateway population will absorb a larger proportion of total turnover ⁷;
- Gross leakages reduced steadily to 2021 in light of gateway scale expansion of shopping in Mullingar and Athlone;
- Tourism spending growing at 1 per cent per annum;
- Average turnover for new convenience goods outlets is 9,000 euros per sq m in 2011 and increasing at 0.5% p.a. thereafter. Turnover is assumed to be considerably higher in Mullingar and Athlone than elsewhere;
- Turnover for new pure comparison goods outlets is 5,000 euros per sq m in 2011 and increasing at 1.5% p.a. thereafter;
- Turnover for new bulky goods outlets is 2,800 euros per sq m in 2006 and increasing at 1.5% p.a. thereafter;
- Efficiency increases in existing stores are all at 0.5% per annum for convenience goods and 1.5% per annum for comparison goods;
- Non-shop comparison spend increases its overall market share by 0.35 percentage points per annum throughout the period.

⁷ Even so, brisk population growth and increased market share from the areas outside of Westmeath and South Roscommon, within 30 minutes drive from Athlone, as a result of increased scale and choice in Athlone as the centre is developed, is assumed.

7.7.2 Results

Convenience

Zone	2006-2011	2011-2016	2016-2021	Total
<i>Mullingar</i>	1,690	2,422	3,475	7,587
<i>Athlone</i>	1,569	2,260	3,258	7,087
<i>Remainder of Study Area</i>	1,065	1,733	2,502	5,300
TOTAL	4,324	6,415	9,235	19,974

Comparison (including bulky goods)

Zone	2006-2011	2011-2016	2016-2021	Total
<i>Mullingar</i>	9,647	14,973	26,016	50,637
<i>Athlone</i>	10,300	15,825	27,469	53,593
<i>Remainder of Study Area</i>	138	206	348	692
TOTAL	20,085	31,005	53,832	104,922

7.7.3 Comparison with Previous Projections

The above results may be compared to the results obtained in the previous projection exercise by John Spain Associates, in terms of annual spending growth and floorspace requirements

1. Annual average growth in spending available to support new floorspace (i.e. growth in resident spending plus inflows, less leakages and less increases absorbed by increases in floorspace efficiency)

	Convenience		Comparison	
	Low	High	Low	High
John Spain, 2002 to 2014	2.6	3.1	6.1	8.2
Roger Tym, 2004 to 2016	3.3		7.0	

2. Floorspace Requirements

Floorspace		Convenience		Comparison (incl. bulky)	
		Low	High	Low	High
John Spain	2002 to 2008	3,950	4,685	21,085	29,269
Roger Tym	2006 to 2011	5,189 (1),(3)		24,102 (1)	
John Spain	2002 to 2014	6,111	7,814	47,225	72,811
Roger Tym	2006 to 2016	12,887 (2),(3)		61,307 (2)	

(1) Adjusted to six year period

(2) Adjusted to 12 year period

(3) Excluding space required to eliminate overtrading in 2006

In terms of spending growth, in general John Spain Associates used higher per capita growth rates for expenditure (1.5-2.0% pa against 0.63% pa average for convenience; 5.0-7.0% pa for comparison, against 4.4% pa), but this is counterbalanced by lower population growth assumptions (1.2% pa from 2005 to 2015, against 2.7% pa from 2004 to 2016). Population growth is more significant for convenience goods projections. Thus, overall, our projections

for convenience goods are higher than that of John Spain Associates, and are on a par for comparison goods.

Differences in floorspace requirements do not follow the same pattern because of assumptions regarding the recapture of leakage of spending from the County. Comparison requirements are on a par with those suggested by John Spain Associates, but are higher for convenience goods.