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# Retail & Commercial Leisure Capacity Study

ON BEHALF OF CAUSEWAY COAST AND GLENS BOROUGH COUNCIL

October 2025

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# 1. Introduction

## Instruction

- 1.1 Nexus Planning ('Nexus') was commissioned by Causeway Coast and Glens Borough Council ('the Council') in May 2025 to undertake a Retail and Commercial Leisure Capacity Study for the Borough.
- 1.2 The Causeway Coast and Glens Retail and Commercial Leisure Capacity Study will form part of the evidence base upon which the emerging Causeway Coast and Glens Local Development Plan (up to 2038) will be established, and will inform decisions on retail planning applications in the Borough. It builds on the earlier, similar, study prepared by Nexus in 2017, using its findings as a benchmark for comparison, which is referenced throughout this report.
- 1.3 The approach adopted by Nexus and the brief provided by the Council, reflects the latest guidance provided in the Strategic Planning Policy Statement (SPPS) 2015.
- 1.4 This Study is supported by new empirical research, with NEMS Market Research Limited (NEMS) undertaking surveys of 700 households within a defined Study Area in June and July 2025. The Study Area for the household survey encompasses seven zones in total, four of which roughly cover the Borough area. For each zone, 100 surveys were undertaken. The zones were identified based on postcode sectors grouped to reflect areas that are expected to exhibit similar patterns of shopping behaviour.
- 1.5 To complete this study, Nexus has examined the latest published land use data from Land and Property Services. Nexus has also referred to the latest NISRA and Experian population and expenditure data in order to establish the up-to-date position with regard to convenience retail, comparison retail, and leisure capacity.

## Report Structure

- 1.6 This report is structured as follows:
  - **Section 2** sets out the context for the Retail and Leisure Study by detailing analysis of key current and future retail trends;
  - **Section 3** examines the current quantitative and qualitative provision of retail facilities in the Borough's six main towns;
  - **Section 4** details our assessments of the current and future population and expenditure levels within the Study Area. It also reviews the survey research and considers the key findings with regard to shopping trip patterns throughout the Study Area, and analyses the quantitative and qualitative need for further convenience and comparison goods retail floorspace over the assessment period (to 2038). Finally this section details the existing leisure provision in the Borough and considers future commercial leisure capacity over the plan period; and
  - In **Section 5** we summarise our findings and identify our recommendations in respect of the Borough's future retail, town centre and leisure strategy.

## 2. Retail and Town Centre Trends

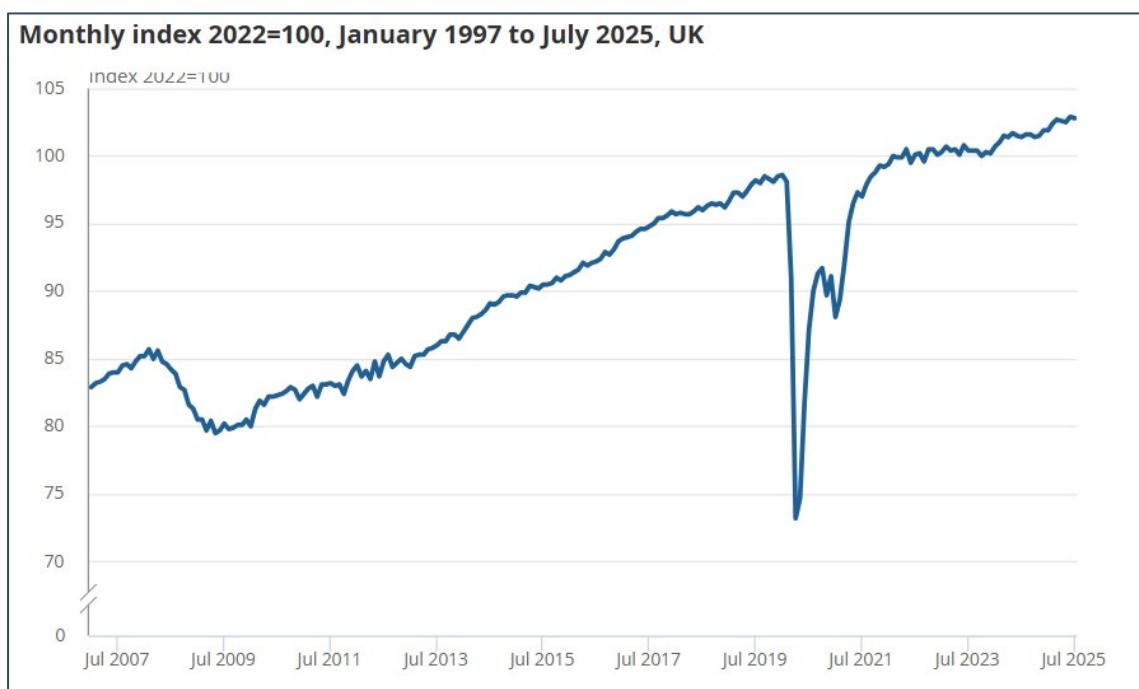
### Retail and Town Centre Trends

- 2.1 We provide an overview of current retail and leisure trends below. The retail and leisure sectors are dynamic, and new retail and leisure formats continue to evolve to meet our everyday needs. The below commentary should therefore be taken as a 'snapshot' at the current time.

#### The Current State of the UK Economy

- 2.2 In recent years the UK economy has been greatly affected by commercial circumstances arising from the Covid-19 pandemic ('lockdowns' in 2020 and 2021), Brexit (January 2020) and the conflict in Ukraine (which started in February 2022). As a result, National Statistics ('ONS') figures indicate that UK GDP has seen dramatic changes whereby the GDP index fell from 98.1 in February 2020 to 73.2 in April 2020, and eventually rising back to its pre-pandemic level in September 2021.
- 2.3 Since then, GDP has generally grown although there have been fluctuations from month-to-month, as seen in Figure 2.3.1. According to the latest figures from the ONS<sup>1</sup>, real GDP is estimated to have grown by 0.2% in the three months to July 2025, compared with the three months to April 2025. In this three month period, the services and construction sectors grew, although output in the production sector fell.

Figure 2.3.1 UK GDP index



Source: ONS

<sup>1</sup> [GDP monthly estimate, UK: July 2025](#)

- 2.4 As of Q3 2025 (July, August, September), inflation stood at 3.8%, primarily driven by changes in household energy bills<sup>2</sup>. The Bank of England highlights an uncertain trading environment, with potential risks arising from rising energy prices as a result of conflict, and greater restrictions on global trade, particularly related to US tariff rates. Inflation is expected to peak at 4.0% in September, as businesses seek to pass on rising labour costs and consumers face higher utility bills. However, it is expected to return to the Bank of England's target of 2% by mid-2026.
- 2.5 According to NISRA<sup>3</sup>, Northern Ireland's Composite Economic Index (NICEI) has recovered significantly from its lows in Q2 2020 and is now 32.7% higher than that point.
- 2.6 The NICEI is also 10.0% above its pre-pandemic level (Q4 2019), outperforming both the Scottish and UK economies in this regard. Compared to the peak before the 2008 economic downturn (Q3 2007), Northern Ireland's output is now 4.2% higher. This growth<sup>4</sup> is largely driven by a strong public sector, including health and social work, public administration and defence, education, as well as a thriving agriculture industry.

### The Retail and Leisure Economy

- 2.7 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>5</sup>, with consumer habits moving away from the traditional high street experience. 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, the results of which were published in March 2022<sup>6</sup>.
- 2.8 High street footfall is a useful indicator of consumer demand, as it reflects the number of potential customers for retail and hospitality businesses. Northern Ireland's high streets were already facing significant challenges prior to the pandemic<sup>7</sup>. In April 2018, retail footfall saw a sharp fall of 7.3%, the worst of all regions in the UK.
- 2.9 More recent data<sup>8</sup> shows that retail footfall in Northern Ireland declined by 9% in March 2025 compared to the previous year, reflecting a downturn in consumer confidence amid ongoing economic uncertainty. This decline was more pronounced in shopping centres, which saw a 9.6% drop in footfall, while high street footfall also fell by 9%. The decrease in footfall is largely attributed to subdued shopper and business confidence. Additionally, businesses have been facing the combined impact of the rise in the National Living Wage and an increase in employer National Insurance contributions.
- 2.10 In the Spring 2025 Economic Commentary<sup>9</sup>, the Department for the Economy (DfE) reports that overall output in Northern Ireland's Wholesale, Retail, Accommodation & Food Services sector increased by 2.0% in Q3 2024, with output now 4.7% above the pre-pandemic level of Q4 2019.

<sup>2</sup> [Monetary Policy Report - May 2025 | Bank of England](#)

<sup>3</sup> [Economic and Labour Market Statistics Branch](#)

<sup>4</sup> [Northern Ireland leads UK regions' economic growth, as new government inherits a strengthening economy](#)

<sup>5</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>6</sup> [High Street Task Force – Report and Recommendations | The Executive Office](#)

<sup>7</sup> [Northern Ireland retail sector in worse shape than any other UK region with 7.3% drop-off in footfall | BelfastTelegraph.co.uk](#)

<sup>8</sup> [Retail footfall in NI slumps by 9% as retailers face 'challenging circumstances' | BelfastTelegraph.co.uk](#)

<sup>9</sup> Department for the Economy, Economic Commentary, Spring 2025

2.11 According to the most recent quarterly Index of Services (IOS) produced by NISRA<sup>10</sup>, in Q2 2025 the wholesale and retail sector in Northern Ireland increased by 1.2% over the quarter and by 5.5% over the previous year. In comparison to the same figures for the UK as a whole, the retail sector in Northern Ireland seems to be in a stronger position of recovery.

2.12 The industry leader in commercial real estate and analytics, CoStar's Retail National Report UK 2023<sup>11</sup> provides an overview of broad trends at a national scale within the retail sector:

- The retail sector is in recovery mode after a difficult pandemic, when multiple lockdowns and online competition caused the permanent closure of many shops and businesses. Net absorption of retail space turned sharply negative as a result, with shopping centres and less affluent towns most severely impacted. Supermarkets and discount retailers were among the few pockets of resilience from a demand perspective.
- The lifting of pandemic restrictions has boosted both footfall and retail sales. This has supported a revival in leasing, with some notable deals by fashion and food and beverage retailers in recent quarters, with experiential retailers expanding too. The national retail vacancy rate has stabilised accordingly.
- Recent positivity comes with some caveats, however. High inflation and a burgeoning cost-of-living crisis have dented consumer confidence. Meanwhile, retail rents continue to decline, with average asking rents dropping by a further 0.5%. Further rent losses are likely in the near term, although town centres with a grocery anchor are well placed to outperform given recent demand trends, as could high streets in more affluent towns and suburbs.
- On the supply side, little new retail space is likely to be built in the next few years, which should offer some support to the vacancy rate. The trend of owners converting retail space to other uses is also likely to accelerate.
- UK retail investment had been recovering until Spring 2022, when falling prices and shopping centre redevelopment opportunities were luring more investors back to the sector. Momentum has eased since then, however, amid concerns over rising inflation, interest rate rises and faltering retail sales.

2.13 In Northern Ireland, leading commercial property agent CBRE NI<sup>12</sup> reported that the region's commercial property investment sector experienced a challenging year in 2024. Total investment volumes fell to £118 million across 24 transactions, a sharp 65% decrease compared to the £338 million recorded in 2023. Despite overall subdued market performance, the retail sector remained the strongest performer, securing its position as the leading investment category in Northern Ireland for the third consecutive year. Retail accounted for 56% of total investment spend in 2024, with the industrial sector emerging as the second most active area.

2.14 According to the Experian Retail Planner Briefing Note 22 – Leisure<sup>13</sup>, between 2011 and 2019 the annual average growth in leisure spending was 0.7 percentage points lower than for retail. Leisure sales then fell significantly in 2020 due to lockdowns, before recovering in 2021, and by 2022 leisure sales stood higher than pre-pandemic levels. However, the cost-of-living crisis and elevated prices inhibited leisure sales in 2023 and 2024. Experian projects leisure sales to increase marginally by 0.9% in 2025 as a result of increases in disposable incomes, particularly in low income households.

<sup>10</sup> NI Quarterly Index of Services

<sup>11</sup> CoStar's Retail National Report UK 2023, July 2023

<sup>12</sup> Retail leads 2024 commercial property investment amid challenging year - NI Chamber

<sup>13</sup> Experian, Retail Planner Briefing Note 22 - Leisure, March 2025

- 2.15 Research<sup>14</sup> conducted by industry bodies, including Hospitality Ulster, UKHospitality, the British Institute of Innkeeping, and the British Beer & Pub Association shows that over a quarter of hospitality businesses in Northern Ireland are now operating at a loss. This is largely attributed to recent increases in employer National Insurance Contributions (NICs) and above-inflation wage rises. Specifically, 27% of operators reported operating at a loss, while a further 20% stated they are merely breaking even. Only 6% of respondents reported generating higher profits in 2025 compared to 2024.
- 2.16 In response to these financial pressures, 49% of hospitality operators reported reducing staff numbers in anticipation of rising costs, and 33% have made staff cuts since April 2025. Over the past 12 months, 51% of respondents indicated their workforce had decreased, while only 9% reported an increase in staffing levels.
- 2.17 Despite these challenges, the latest forecasts from industry intelligence specialists CIS<sup>15</sup> suggest signs of investment. In 2024, approximately £81 million worth of new hospitality projects commenced in Northern Ireland, a 121% increase on the previous year. These projects include the development of 585 new hotel beds, with an additional 158 beds under construction as of Q1 2025.

### Consumer Spending

- 2.18 Growing evidence suggests that consumers are beginning to spend savings, and households are making adjustments to afford essential spending. In 2022, the UK experienced the largest increases in prices in forty years, with price rises in essential products such as energy and food. This has resulted in a prolonged cost-of-living crisis, as households tighten their budgets. In Northern Ireland, the cost-of-living remains a top concern for consumers. According to a *Which?* consumer report from 2023<sup>16</sup>, worries about energy, food, and housing costs have significantly increased compared to the previous year. Financial difficulties are also on the rise, with 63% of consumers in Northern Ireland reporting that they had to adjust their household spending to cover essentials in the previous month. This is an increase from 46% last year and is higher than the adjustment rate in other UK nations. Additionally, rising prices are damaging trust in businesses, with trust in the energy, food, broadband and mobile sectors having declined compared to the previous year, which may affect spending patterns going forward.
- 2.19 The latest Experian Retail Planner Briefing Note<sup>17</sup> makes several comments regarding consumer spending, focusing on the UK's recovery from the economic impact of the Russia-Ukraine war and the Covid-19 pandemic. Data collected in early 2025 showed that retail sales volumes rebounded, the first time since 2021. This rebound was supported by strong real terms pay growth, driven by falling inflation (from 4% in January to 2.5% in December 2024) while the labour market stayed relatively tight resulting in strong nominal wage growth (total pay). In January 2025, food store sales volumes rose by 4.5%, the largest monthly increase since March 2020. Spending growth over the course of 2025 is expected to be constrained by a renewed rise in inflation, pressure on household budgets, businesses passing on increased costs stemming from higher National Insurance Contributions (NICs), an uplift in the National Minimum Wage, rising business rates from April, and higher energy prices.
- 2.20 In terms of convenience spending, there was a downturn in sales volume in 2021 and 2022, following a bumper lockdown-induced demand in 2020. Convenience spending is estimated to contract by 1.8% per head in 2024, a deeper decline than previously forecasted, followed with a modest fall of 0.8% in 2025. In the long term, growth on a per head basis is likely to settle at 0.2% per annum.

<sup>14</sup> OVER A QUARTER OF NI HOSPITALITY BUSINESSES NOW OPERATING AT A LOSS

<sup>15</sup> Northern Ireland is back building again as construction set for 'spectacular recovery' – The Irish News

<sup>16</sup> Consumers in Northern Ireland – A Cost of Living Crisis Briefing

<sup>17</sup> Experian, Retail Planner Briefing Note 22, March 2025

- 2.21 Retail sales growth is anticipated to rebound modestly, particularly in the comparison category, supported by rising real discretionary incomes. Comparison spending contracted marginally in 2024, although growth is expected to accelerate modestly from 2025 onwards, as falling interest rates improve the affordability of replacement of white goods ('bulky' goods). The long-term growth per head for comparison averages around 2.6%.
- 2.22 Despite leisure spend falling markedly in 2020 (given Covid-19 related lockdowns), they recovered lost ground in 2021 and stood higher than pre-pandemic levels by 2022. However, the cost-of-living crisis affected spending in 2023, as leisure spending was estimated at 20.9% per head in 2022, followed by a 2.9% per head contraction in 2023. Modest growth is projected over the medium term. In the long term, growth on a per head basis is likely to settle at 0.7% per annum.

Figure 2.22.1 Experian's Identified UK retail spending (including non-store) and leisure spending<sup>18</sup>

Volume Growth Per Head (%)	2023	2024	2025	2026	2027-31	2032-40
Annual averages						
Retail Spend	-3.3	-1.3	-0.2	0.6	1.5	1.7
Convenience goods	-3.5	-1.8	-0.8	-0.6	-0.3	-0.2
Comparison goods	-3.2	-1.0	0.1	1.3	2.5	2.6
<i>of which bulky</i>	-7.8	0.1	0.1	1.5	2.7	2.6
<i>Non-bulky</i>	-1.3	-1.4	0.1	1.3	2.4	2.6
Leisure	-2.9	-1.6	0.0	0.3	0.6	0.7
Consumer spending	-1.3	-1.2	0.3	1.1	1.4	1.5

Source: Figures 1a and 1b of Experian Retail Planner Briefing Note 22

### Online Shopping

- 2.23 The rise in internet retailing has been at the forefront of retail evolution for a number of years. Covid-19 has accelerated this trend.
- 2.24 According to the Consumer Insight Survey<sup>19</sup>, 89% of shoppers in Northern Ireland (respondents) engage in at least some online shopping, with 27% of respondents doing most or all of their shopping online. This trend is particularly prominent among those aged 16-34, individuals with an annual income of £60k+, and those who are significantly limited by a disability. The most commonly purchased items online include clothing and footwear (68%), gifts (59%), and entertainment products (49%).
- 2.25 Generally, Experian shows that growth in non-store retail is expected to be maintained, particularly through the wider adoption of technology such as mobile phones and tablets combined with 5G and fibre optic networks, faster delivery times and easier returns processes to make internet shopping even more convenient. Experian expects that market share will continue to grow in the mid-term, whereby in 2030, 29.4% of retail expenditure would be spent online. The pace of e-commerce growth is anticipated to moderate over the longer term, reaching 34.8% of total retail sales by 2040<sup>20</sup>.

<sup>18</sup> Experian, Retail Planner Briefing Note 22, March 2025<sup>19</sup> [Consumer Insight Survey 2022 | Consumer Council](#)<sup>20</sup> Experian, Retail Planner Briefing Note 22, March 2025

Figure 2.25.1 Experian's Identified and Forecast Market Share of Non-Retail Sales<sup>21</sup>

Volume Growth Per Head (%)	2025	2030	2035	2040	% Change
Total	26.6%	29.4%	32.1%	34.8%	+8.2
Convenience goods	17.5%	19.9%	22.1%	24.4%	+6.9
Comparison goods	32.1%	34.5%	36.8%	39.0%	+6.9

Source: Appendix 3 of Experian Retail Planner Briefing Note 22

### Omni-Channel Retail

- 2.26 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.
- 2.27 Omni-channel retail (or omni-channel 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>22</sup>. Such purchases, therefore, help to sustain tangible retail floorspace.
- 2.28 A report by Barclays Corporate Banking, indicates that almost 47% of consumers continue to spend on luxury purchases even when trying to make cutbacks<sup>23</sup>. In essence, goods that are bought through the influence of social media and online presence. This report therefore shows how online and retail sales channels are becoming more intertwined.
- 2.29 The acceleration in consumer behaviour change in 2020 has made an omni-channel 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 omni-channel retailing moving forward, a move away from their plans prior to COVID-19<sup>24</sup>.
- 2.30 When it comes to shopping in physical stores, 2023 research by RealEconomics<sup>25</sup> highlights that physical retail is preferred by consumers than online shopping. Shoppers are nearly twice as likely to value seeing and feeling items they are buying in real life (61%); meanwhile, (39%) of shoppers prefer purchasing online.

### Conclusion

- 2.31 Retail has been an industry under significant stress, as many retailers find themselves squeezed between rising costs and the increasing volume of sales over the internet. Such difficulties have, of course, been exacerbated by the Covid-19 pandemic and the cost-of-living crisis associated with rising energy prices and inflation. In response to this unpredictability, those operating in the market are forced to adapt quickly or otherwise face falling profits.
- 2.32 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 resilience in retail stores moving forward. Planning policy can play an important role in helping to future-proof city, town and village centres against the ongoing uncertainty.

<sup>21</sup> Experian, Retail Planner Briefing Note 22, March 2025

<sup>22</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>23</sup> [Card spending returns to growth in August as the summer heatwave and 'Sweet Treat Economy' lift spirits, 2024](#)

<sup>24</sup> [bigcommerce.co.uk](#)

<sup>25</sup> [Understanding Consumer Segmentation for In-store & Online Markets 2023](#)

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- 2.33 The retail sector endured a particularly difficult pandemic, with multiple lockdowns and online competition leading to the permanent closure of many shops and businesses. UK high streets had already been in continuous decline since the 2007 recession, with consumer habits moving away from traditional high street experience. The pandemic, however, accelerated these pre-existing challenges, including creating an unprecedented rise in online shopping.
- 2.34 The retail market remains highly challenging, shaped by shifts in consumer behaviour, the continued growth of online shopping, and wider economic pressures. In this context, it is essential that great care is taken to protect and support town centres, ensuring their long-term vitality and viability. This approach is firmly underpinned by the policy guidance set out in the SPPS (2015). The SPPS establishes a clear 'town centres first' approach, which is designed to direct retail and other key town centre uses to established centres in order to support their vitality and viability.

### 3. Town Centre Health-Checks

#### Methodology

- 3.1 Health checks are recognised as important planning ‘tools’ for appraising and monitoring the changes in the overall vitality and viability of town centres and informing both plan-making and decision-taking at the local level.
- 3.2 In this context, this Study provides detailed health check assessments for the six Town Centres of Coleraine, Limavady, Ballymoney, Ballycastle, Portrush, and Portstewart.
- 3.3 All of the health checks have been carried out in accordance with the PPS5: Retailing and Town Centres<sup>26</sup>, which sets out a number of key performance indicators used to help assess and monitor the overall health and performance of the centres. This has informed the creation of a SWOT assessment, with the general methodology set out below.

#### SWOT Assessment

- 3.4 The Nexus SWOT assessment has been formulated to encompass the following:
  1. **Retail Offer** – Using observations from site visits carried out in July 2025, we examine Experian GOAD categories i.e. convenience, comparison, service uses, and vacant units. We compare the results against current UK average benchmarks for each category (Experian Category Report, 2024) for all centres and shopping locations covered by Experian. We also look at results from the previous Causeway Coast and Glens Retail and Commercial Leisure Capacity Assessment in 2017, for which the data was collected in 2016. The 2025 dataset used in this study is more comprehensive than the 2016 data underpinning the 2017 assessment, as it includes a detailed breakdown of service categories that was not available in the earlier Land and Property Services records. These categories include financial & business; leisure; and retail.
  2. **Vacant Units** – We contrast the current vacancy rate with the previous 2017 study and current UK averages. We also consider any vacancy ‘hot-spots’ and reasoning why those might have occurred.
  3. **Visitor Satisfaction** – Visitor Satisfaction is derived through analysis of answers to Questions 26-34 of the Household Telephone Survey on residents’ likes and dislikes for each centre.
  4. **Community Involvement & Public Investment** – We review the level of engagement between the local authority, local business and the community, through appraising publicly available information, in addition to our on-site observations. We also examine the level of community engagement in each centre and detail any events which each centre is renowned for.
  5. **Footfall** – Footfall data has been collated by Springboard, on behalf of Causeway Coast and Glens Borough Council. The most recent footfall data available for each town is from 2025.
  6. **Access and Car Parking** – This is a Nexus assessment of how easy a centre is to reach; public transportation options; and access by other modes (such as cycling or walking). In addition, car parking is assessed based on its quantity and quality.

<sup>26</sup> <https://library2.nics.gov.uk/pdf/dr2/2014/0344.pdf>

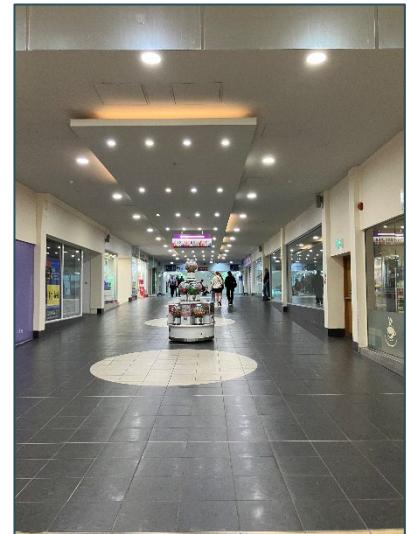
7. **Environmental Quality** – A Nexus assessment of environmental quality including general cleanliness and attractiveness, the quality of buildings and the quality and provision of open spaces.
8. **Night-time Economy** – Using comparison data collected, we assess businesses which typically operate beyond the standard working day, such as restaurants and public houses.

## Coleraine Town Centre

### **Description**

- 3.5** Coleraine is the principal town in Causeway Coast and Glens Borough and functions as a major centre for shops and services and is its largest town by population (24,483 at the 2021 Census). The town is designated as a Main Hub within the Regional Development Strategy 2035 (2012) and is located near to tourist destinations such as the Giant's Causeway and Causeway Coast World Heritage Site. Further, the town is the administrative hub of the Borough.
- 3.6** The town is positioned on the key transport corridor of the A26 and is also accessible by public transport, with the Coleraine Railway Station located within the north-east corner of the town centre boundary. The Centre's primary pedestrian street runs in an east-west direction through the centre of the town, along Church Street, The Diamond, and Bridge Street.
- 3.7** Coleraine experienced a slight population increase between the 2011 and 2021 Censuses, with a population change of +3.1% (743 people).

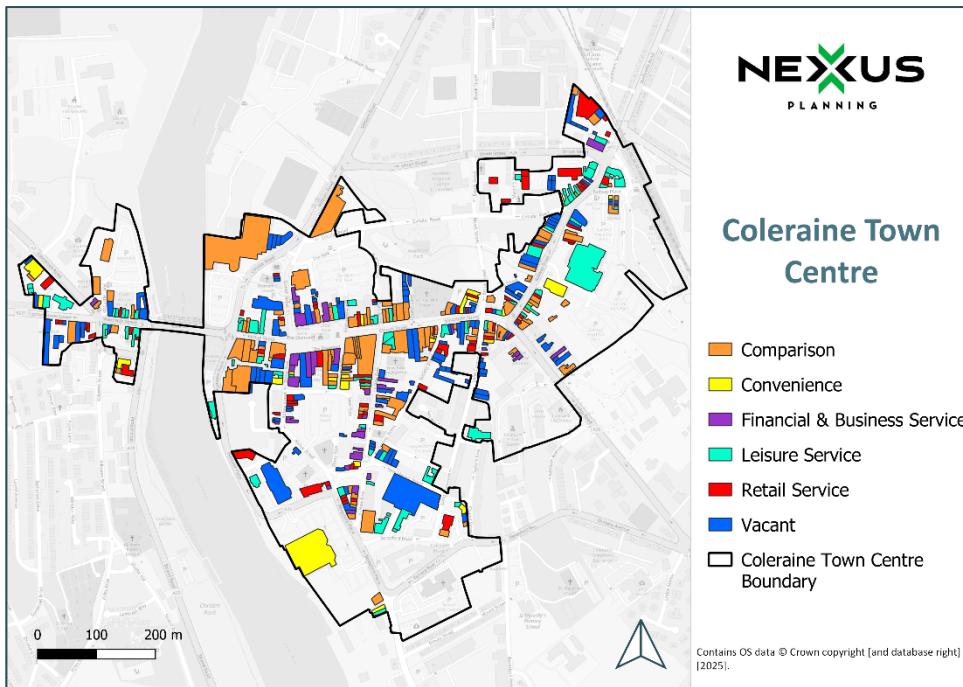
Figure 3.7.1 Photos of Coleraine



Source: Nexus Site Visit (July 2025)

## Retail Offer

Figure 3.7.2 Coleraine Town Centre Composition Map



Source: Nexus Site Visit (July 2025)

- 3.8 The composition of Coleraine's town centre offer is detailed in the Figures below. There are 457 units in the Centre, which makes Coleraine the largest Town Centre in the Borough with regard to unit numbers. This is up from 2016 when 431 units were recorded.
- 3.9 There are 114 comparison units in the centre, representing 24.9% of all units. This is only slightly below the UK average of 26.1% and is down from 2016 when this figure was 38.5%.
- 3.10 The proportion of convenience units within the Coleraine Town Centre is 5.5% (25 units), which is below the UK average of 9.4%, and is down from 2016 when this figure was 7.4%. The convenience offer includes a Tesco, Spar Shop and Iceland, in addition to smaller convenience shops, bakeries and butchers.
- 3.11 The services offer is 41.1% (188 units), which is below the UK average of 50.2%. Retail services are better represented than the UK average, financial & business services are slightly below average, and leisure services are under-represented by 9.8%. Whilst there has been an increase in the number of town centre units overall, the majority of the extra units relate to an increase in the Services offer, and an increase in the number of vacant units. There has also been a reduction in comparison and convenience units.

Figure 3.11.1 Coleraine Composition Table

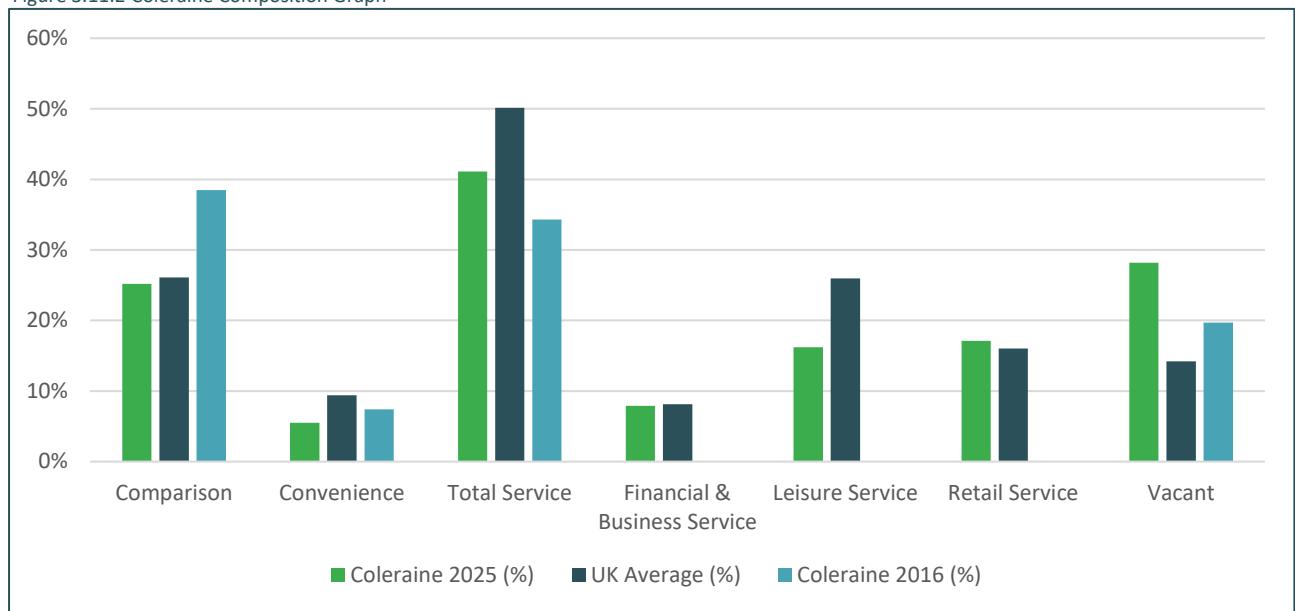
	2025			2016	
	Coleraine (No. units)	Coleraine (%)	UK Average (%)	Coleraine (No. units)	Coleraine (%)
Comparison	114	24.9%	26.1%	166	38.5%

	2025			2016	
<b>Convenience</b>	<b>25</b>	<b>5.5%</b>	<b>9.4%</b>	32	7.4%
<b>Services (total)</b>	<b>188</b>	<b>41.1%</b>	<b>50.2%</b>	148	34.3%
<i>Financial &amp; Business</i>	36	7.9%	8.2%	-	-
<i>Leisure</i>	74	16.2%	26.0%	-	-
<i>Retail</i>	78	17.1%	16.0%	-	-
<b>Vacant</b>	<b>130</b>	<b>28.4%</b>	<b>14.2%</b>	85	19.7%
<b>Total</b>	<b>457</b>	<b>100.0%</b>	<b>100.0%</b>	431	100.0%

Source: Nexus Site Visit (July 2025), Experian Goad Category Report (March 2024)

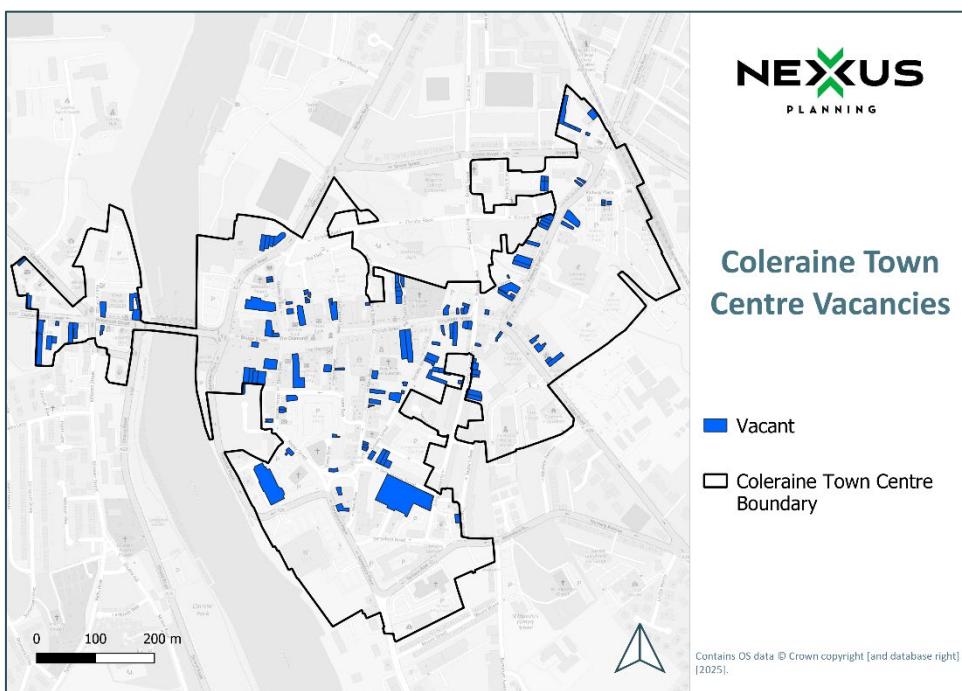
Note: 2016 comparison figures were based on records from Land and Property Services data, where a breakdown of service categories was not available.

Figure 3.11.2 Coleraine Composition Graph



## Vacant Units

Figure 3.11.3 Coleraine Vacancy Distribution Map



Source: Nexus Site Visit (July 2025)

- 3.12 Coleraine has 130 vacant units, which constitutes 28.4% of surveyed units in the centre. This is well above the UK average of 14.2% and is the second highest vacancy rate of the six town centres surveyed as part of this study, behind Ballycastle. There was no outlying concentration of vacancies in the centre, though there were generally a greater number recorded away from the central streets of Church Street, The Diamond, and Bridge Street.

## Visitor Satisfaction

- 3.13 According to Q26 of the household survey, 55.4% of respondents in the Study Area visit Coleraine Town Centre, which makes it the most visited town centre in the Borough, albeit it is slightly less visited than Coleraine Riverside, which 56.0% of respondents said they visit. These visitors originate primarily from Zones 1-3, with lower visiting rates across Zones 4-7.
- 3.14 22.9% of survey respondents do not visit Coleraine because it is too far from home. Other commonly cited reasons were due to the lack of choice and range of non-food shops (18.3%) and the lack of choice and range of food shops (18.3%). This suggests there is a level of dissatisfaction with the current provision of convenience and comparison retailers in the centre.

## Community Involvement & Public Investment

- 3.15 At the time of our site visit in July 2025, Coleraine Town Centre was observed to have a welcoming and community-oriented atmosphere, focused around the main pedestrian route encompassing Church Street, The Diamond, and Bridge Street.
- 3.16 Coleraine Town Hall, located on The Diamond, is the primary event space within the Town Centre for community events. In addition, the Coleraine Leisure Centre provides the community with a wide range of health, fitness, and recreational

facilities and programs. There are also venues and spaces available for public booking to hold community events outside the Town Centre boundary, including the Coleraine West Community Centre to the south-west, and Ballysally Youth & Community Centre to the north.

- 3.17 Coleraine is host to The Causeway Speciality Market, which takes place around the Town Hall on the second and fourth Saturday of each month. The market is currently the largest regular outdoor market in Northern Ireland with up to 50 stalls, offering arts, crafts, gifts, and local produce. The Speciality Market is facilitated by the Council and involves some level of partnership between the Local Authority, local businesses and the local community.

### Footfall

- 3.18 Footfall statistics within Coleraine Town Centre has been collected by Springboard to track annual performance trends during 2019, 2023, 2024, and 2025.
- 3.19 As illustrated in the below graph, overall visitor numbers remain somewhat stable throughout the year, with a higher number of people visiting the Centre during the summer months and in September and December. The lowest footfall is consistently shown to be during the early months of the year. The graph also indicates that footfall has not returned to the 2019 (pre-Covid-19) levels.
- 3.20 During the site visit which took place around lunch time on 24<sup>th</sup> July, it was observed that the busiest area in terms of footfall was along the pedestrianised area along Church Street, The Diamond, and Bridge Street. However, further away from this central spine the centre became noticeably quieter, and less community oriented. This was particularly true further north towards the Coleraine Railway Station and further south towards Terrace Row Presbyterian Church. It was also observed that The Diamond Shopping Centre on the corner of Hanover Place and Bridge Street had limited public interest and footfall, despite being in a prominent and central location.

Figure 3.20.1 Coleraine Footfall Data



Source: Springboard

### Access and Car Parking

- 3.21 Coleraine Railway Station is located along the north-east boundary of the defined centre, which services the Derry-Londonderry Line. The station provides direct access to numerous towns, including Belfast, Derry-Londonderry, Portrush, and Ballymoney.
- 3.22 Additionally, a bus centre is located adjacent to the railway station which services local and intercity routes, and local bus stops are dispersed within and surrounding the Town Centre. The bus routes provide regular services to nearby destinations including Ballymoney, Ballycastle, Portrush, Portstewart, and Limavady.

- 3.23 The Centre is fairly easy to navigate on foot. Railway Road connects the railway station to the Centre's pedestrianised area, with clearly marked footpaths on both sides of the road.
- 3.24 Some cycle parking and cycle lanes were observed during the site visits, although the cycle lanes were often not well marked throughout the Centre.
- 3.25 The western edge of the Town Centre, around Waterside, is somewhat separated from the eastern side by Coleraine Bridge. Nevertheless, the bridge includes a clearly designated and segregated pedestrian and cycle path running alongside the vehicle carriageway, providing good accessibility between the two areas.
- 3.26 Within the Town Centre, the River Bann waterfront has limited pedestrian access, with the town centre effectively turning its back on the river.
- 3.27 Numerous public car parks are distributed throughout the Town Centre, all of which are set back from the pedestrianised area. Street parking is also available in some locations.
- 3.28 2.3% of those survey respondents who do not visit Coleraine commented that the centre is difficult to access via public transport, which is the fifth most common reason given for not visiting, and another 1.7% of respondents labelled traffic congestion as a concern, making it the eighth most common reason for not visiting.

### **Environmental Quality**

- 3.29 Coleraine Town Centre varies in environmental quality. The pedestrianised area at the centre has a charming, historic character, with shop frontages that are generally well-maintained and the area being reasonably clean with minimal litter and graffiti observed. Away from the central pedestrianised area, where less pedestrian traffic was prominent, shop frontages were generally in a poorer state and in some instances were closed with roller shutters or boarded up.
- 3.30 Minimal green spaces are available for public enjoyment within the Town Centre boundaries. However, some planter boxes, planted trees, and hanging plants were observed along streets, primarily within the pedestrianised area. The churchyard of St Patrick's Church and a small garden area adjoining Hanover Place provide welcomed green space, however, do not provide public seating.
- 3.31 Anderson Park adjoins the Town Centre boundary immediately to the north, which provides a generous amount of public amenity space within close proximity to the centre and acts as an important pedestrian route for students between the Northern Regional College and the town centre.

### **Night-time Economy**

- 3.32 Coleraine has 52 hospitality units, including cafes, pubs, take-away food premises, and restaurants, some of which operate during evening hours and are mostly located along Church Street and Railway Road. However, the nighttime economy is somewhat limited in Coleraine, with only a small number of restaurants and a larger number of take-away premises.

## **Limavady Town Centre**

### **Description**

- 3.33 Limavady is the second largest town by population (11,729 habitants at the 2021 Census) in Causeway Coast and Glens Borough, albeit only by a small margin above Ballymoney. The town is designated as a Main Hub in the Regional

Development Strategy 2035 (2012). Located between the larger towns of Coleraine and Derry-Londonderry, Limavady plays a secondary role for provision of services.

- 3.34 Limavady is positioned at the intersection of the A37 (Broad Road) and the A2 (Ballykelly Road), being a key east-west transport corridor within the Borough. While the town is not serviced by a railway station, a number of bus stops within the centre provide local and intercity services, with the main bus station in the north-west corner of the town centre. Market Street is the Centre's primary pedestrian street, which runs in a north-south direction through the centre of the town.
- 3.35 Limavady experienced a slight population decrease between the 2011 and 2021 Censuses, with a population change of -2.8% (341 people).

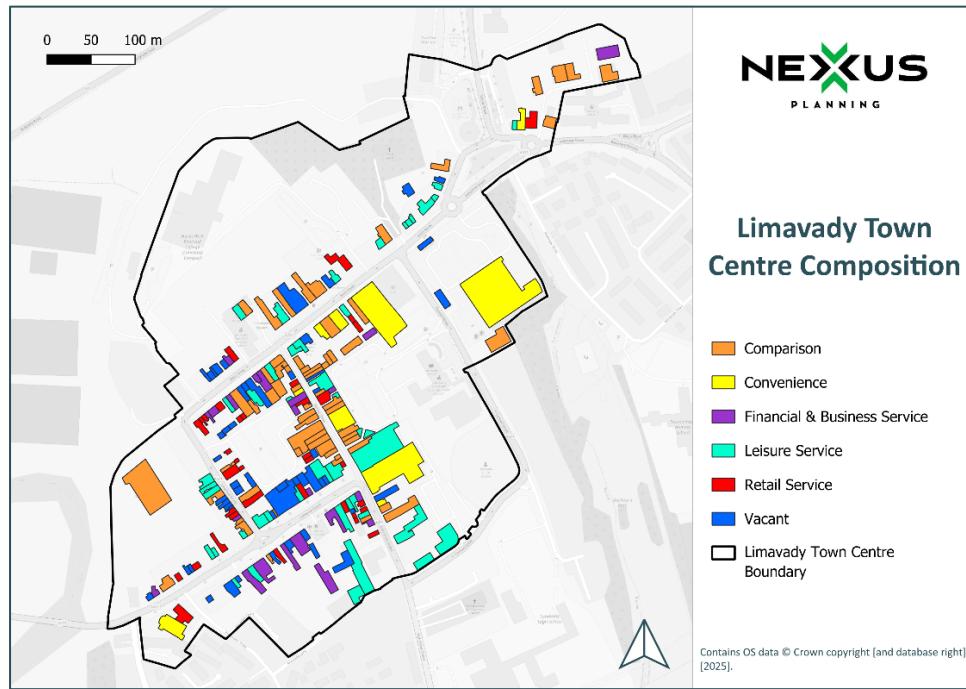
Figure 3.35.1 Photos of Limavady



Source: Nexus Site Visit (July 2025)

### Retail Offer

Figure 3.35.2 Limavady Town Centre Composition Map



Source: Nexus Site Visit (July 2025)

- 3.36 The composition of Limavady's retail offer is detailed in the Figures below. The Centre contains 229 units, making Limavady the Borough's second-largest Town Centre in terms of unit numbers, albeit by a narrow margin. This represents a slight increase from 2016, when 221 units were recorded.
- 3.37 There are 63 comparison units in the centre, representing 27.5% of all units. This is slightly above the UK average of 26.1% and is down from 2016 when this figure was 38.5%.

- 3.38 The proportion of convenience units within the Limavady Town Centre is 4.4% (10 units), which is below the UK average of 9.4%. The convenience offer includes a Tesco, Lidl, Supervalu, and Spar Stores, in addition to smaller convenience shops and butchers.
- 3.39 The services offer is 45.4% (104 units), which is below the UK average of 50.2%. Retail services and financial & business services are broadly in line with the UK average, while leisure services are under-represented by 6.3%.

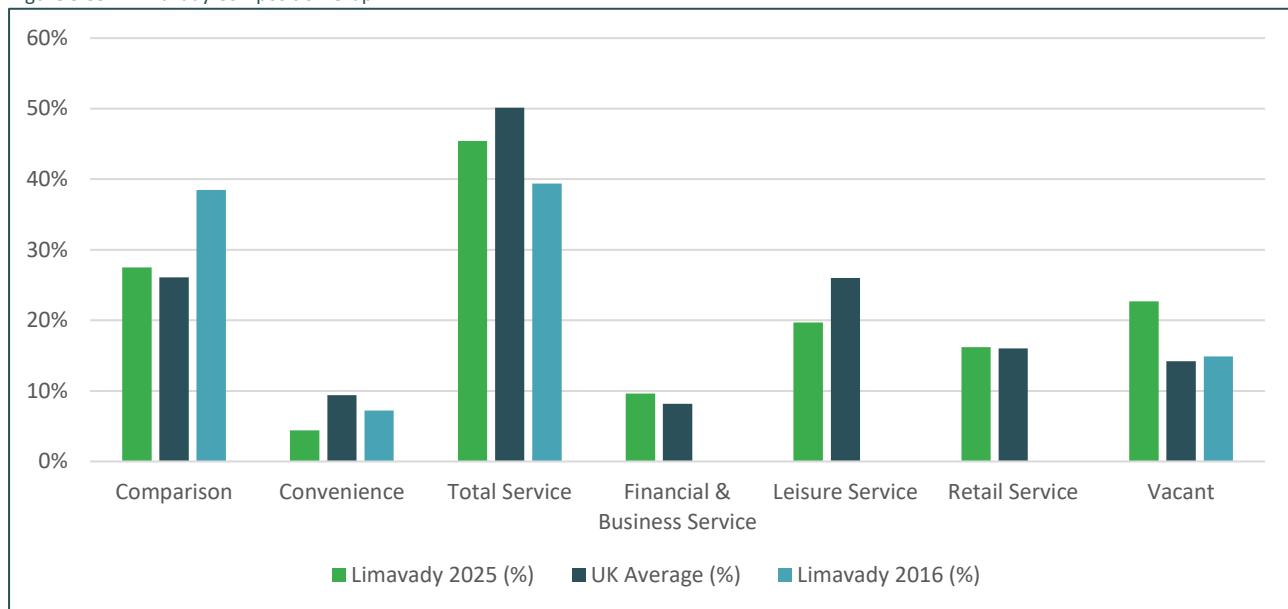
Figure 3.39.1 Limavady Composition Table

	2025			2016	
	Limavady (No. units)	Limavady (%)	UK Average (%)	Limavady (No. units)	Limavady (%)
<b>Comparison</b>	<b>63</b>	<b>27.5%</b>	<b>26.1%</b>	85	38.5%
<b>Convenience</b>	<b>10</b>	<b>4.4%</b>	<b>9.4%</b>	16	7.2%
<b>Services (total)</b>	<b>104</b>	<b>45.4%</b>	<b>50.2%</b>	87	39.4%
<i>Financial &amp; Business</i>	22	9.6%	8.2%	-	-
<i>Leisure</i>	45	19.7%	26.0%	-	-
<i>Retail</i>	37	16.2%	16.0%	-	-
<b>Vacant</b>	<b>52</b>	<b>22.7%</b>	<b>14.2%</b>	33	14.9%
<b>Total</b>	<b>229</b>	100.0	-	221	100.0%

Source: Nexus Site Visit (July 2025), Experian Goad Category Report (March 2024)

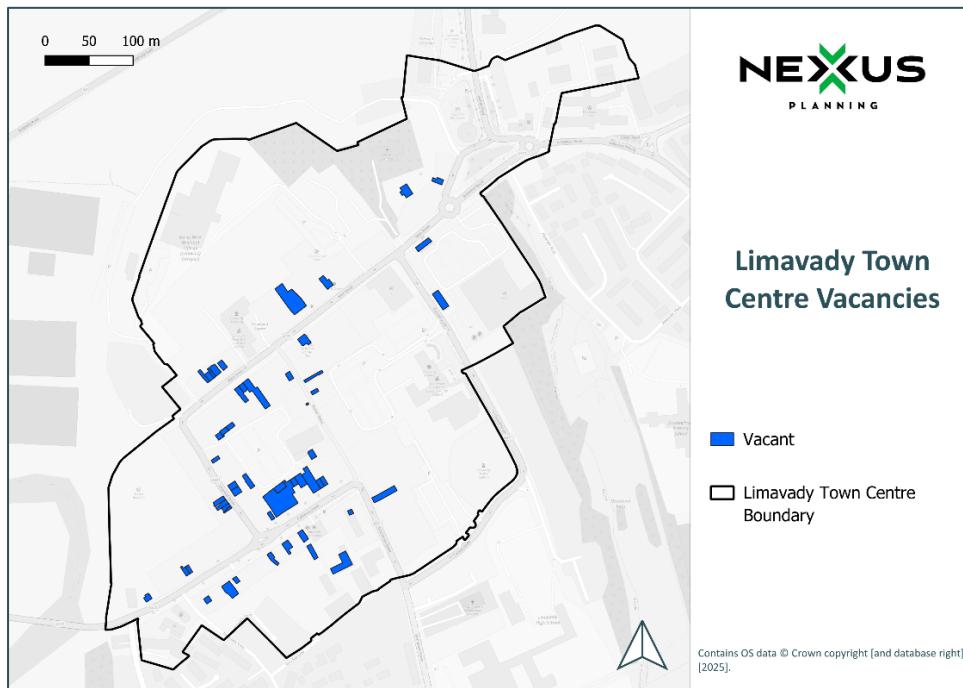
Note: 2016 comparison figures were based on records from Land and Property Services data, where a breakdown of service categories was not available.

Figure 3.39.2 Limavady Composition Graph



## Vacant Units

Figure 3.39.3 Limavady Vacancy Distribution Map



Source: Nexus Site Visit (July 2025)

**3.40** Limavady has 52 vacant units, which constitutes 22.7% of all units in the centre. This is well above the UK Average of 14.2%, and is up from 2016, when 14.9% vacancy was recorded.

**3.41** A concentration of vacant units was observed within the western extent of the centre, west of Market Street.

## Visitor Satisfaction

**3.42** Only 34.7% of household survey respondents said they visit Limavady, which makes it the second least visited centre in the Borough.

**3.43** When asked why they do not visit Limavady, the most common responses were that it is far from home (35.4%), that there is a lack of choice and range of non-food shops (6.3%) and that there is a lack of choice and range of food shops (4.1%). Like Coleraine, this would suggest that the current comparison and convenience retail offer is not a draw to customers from a wider area.

## Community Involvement & Public Investment

**3.44** During our site visit which took place around mid-morning on 25<sup>th</sup> July 2025, Market Street, Limavady's primary pedestrian thoroughfare, was noted for its lively atmosphere and its role as the focal point of retail and social activity within the Town Centre. The concentration of independent shops and services along Market Street in particular creates a strong sense of local identity within the centre.

**3.45** The Hub Community Centre located at the intersection of Catherine Street and Linenhall Street, which provides a space offering activities, support services, and programs that promote social connection, wellbeing, and community development for people of all ages.

3.46 Roe Valley Arts & Cultural Centre is the main community event space within the Town Centre, located along Main Street to the north of Market Street. The venue offers a variety of flexible spaces which can be used by the community for performing arts, meetings, exhibitions, and events. Various events and exhibitions are hosted at the Roe Valley Arts & Cultural Centre which encourage community participation and involvement of local businesses, in addition to spaces being available for public hire. Additionally, the annual Limavady Agricultural Show is held approximately 3km north-east of the Limavady township, at the Aghanloo Industrial Estate on Aghanloo Road.

3.47 The Borough Council works with Naturally North Coast & Glens (NNCG) and local businesses to operate Roe Valley Speciality Market, which is held in Drumceatt Square located beside the Roe Valley Arts and Cultural Centre. The market offers a range of food, art and handmade craft stores and is held throughout the year with dates listed on the NNCG website.

### Footfall

3.48 Footfall data for Limavady Town Centre has been collected by Springboard to track annual performance trends during late 2019, 2023, 2024, and 2025. Overall, visitor numbers remain relatively stable throughout the year, with the exception of the pre-Christmas period, when increases of around 50% are typically recorded. The data shown in the graph below also indicates that footfall in Limavady Town Centre has generally decreased since 2019 albeit by a small margin.

Figure 3.48.1 Limavady Footfall Data



Source: Springboard

### Access and Car Parking

3.49 Limavady Town Centre is serviced by local and intercity bus routes, with bus stops dispersed around the Centre and the main bus station being located within the north-west corner of the town centre at the intersection of Main Street, Mill Place, and Demesne Place. Regular services are provided to Coleraine, Ulster University in Coleraine, and Derry-Londonderry, in addition to smaller nearby towns.

3.50 As discussed previously, Limavady is not serviced by a railway station, with the nearest station being in Bellarena. The Bellarena Railway Station is accessible via a direct bus route as well as by private vehicle via the A2 (Aghanloo Road).

3.51 The Centre is easily navigable on foot, with well-defined footpaths throughout and a well-marked pedestrianised area at its core.

3.52 Only a small number of Sheffield cycle stands were identified within the Centre, and several bicycles were noted as being parked on pavements where designated parking facilities were not available nearby. Additionally, no segregated cycle lanes were observed within the town's boundaries.

- 3.53 Numerous public car parks were distributed throughout the Town Centre, and street parking was widely available.
- 3.54 2.9% of survey respondents who do not visit Limavady cited a lack of accessibility by public transport, and another 1.2% suggested that car parking is inconveniently located.

### Environmental Quality

- 3.55 Limavady Town Centre demonstrates a generally good standard of environmental quality at its core, though areas of decline are evident in some instances towards its peripheries.
- 3.56 Market Street, the main pedestrian thoroughfare, has a welcoming and traditional character, with a number of shop frontages maintained to a reasonable standard and the street environment appearing relatively clean, with little evidence of litter or graffiti. Beyond the pedestrianised core, particularly along streets with lower levels of footfall, the quality of shop frontages is more variable, with a number of units vacant and secured by roller shutters or boarding. This was particularly evident along Linenhall Street, Catherine Street, and the western extent of Main Street.
- 3.57 Green space provision within the Town Centre itself is limited, although elements such as hanging plants, and a small number of planted street trees contribute positively to the streetscape. Public benches are provided throughout the Centre to provide areas for seating and encourage people to pause and linger.
- 3.58 Roe Mill Playing Fields and Blackburn Park are located on the edge of the Town Centre, and provide significant recreational and amenity space within close proximity, complementing the limited greenery found within the core of the town.

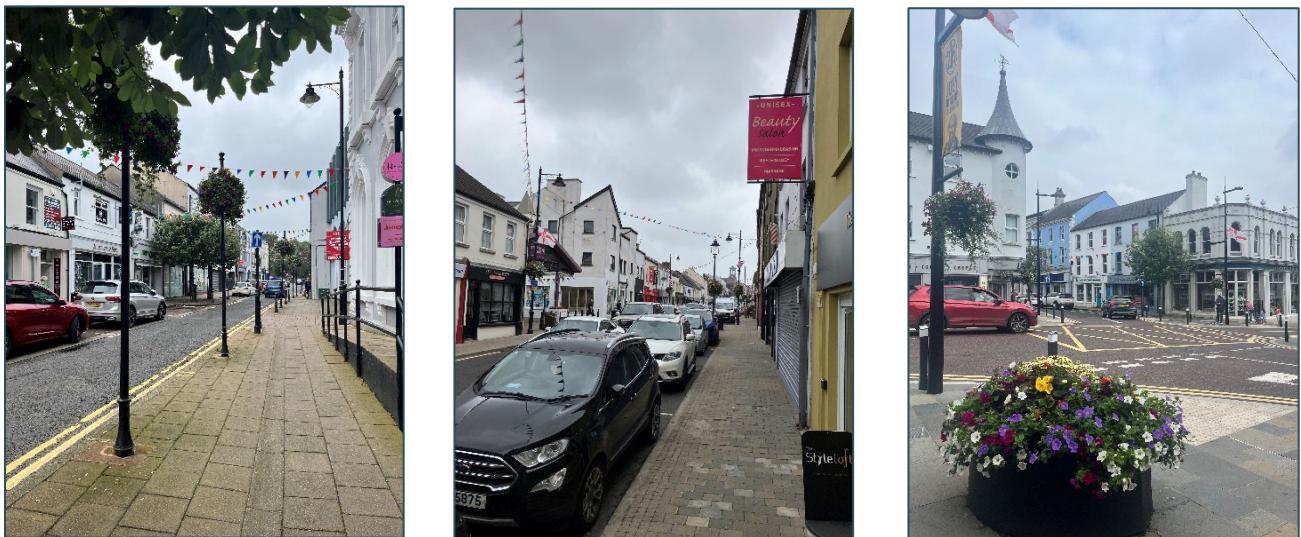
### Night-time Economy

- 3.59 Limavady has 36 operating hospitality units, including pubs, bars and restaurants, a number of which operate during evening hours. The majority of these businesses are located along Catherine Street and Main Street.
- 3.60 1.1% of survey respondents who do not visit Limavady suggested that there is a lack of choice in leisure facilities, such as pubs, restaurants and cinemas.

### Ballymoney Town Centre

- 3.61 Ballymoney is one of the four Main Towns within the Causeway Coast and Glens Borough and is designated as a Local Hub within the Regional Development Strategy 2035 (2012). The town is positioned relatively centrally within the Borough and is on the key transport corridor of the A26 and the Ballymoney Railway Station, making it a highly accessible town. Main Street is the Centre's primary retail street which runs in a north-south direction through the centre of town.
- 3.62 Ballymoney's population at the 2021 Census was recorded to be 11,048. It experienced a population increase between the 2011 and 2021 Censuses, with a change of +10% (1,006 people).

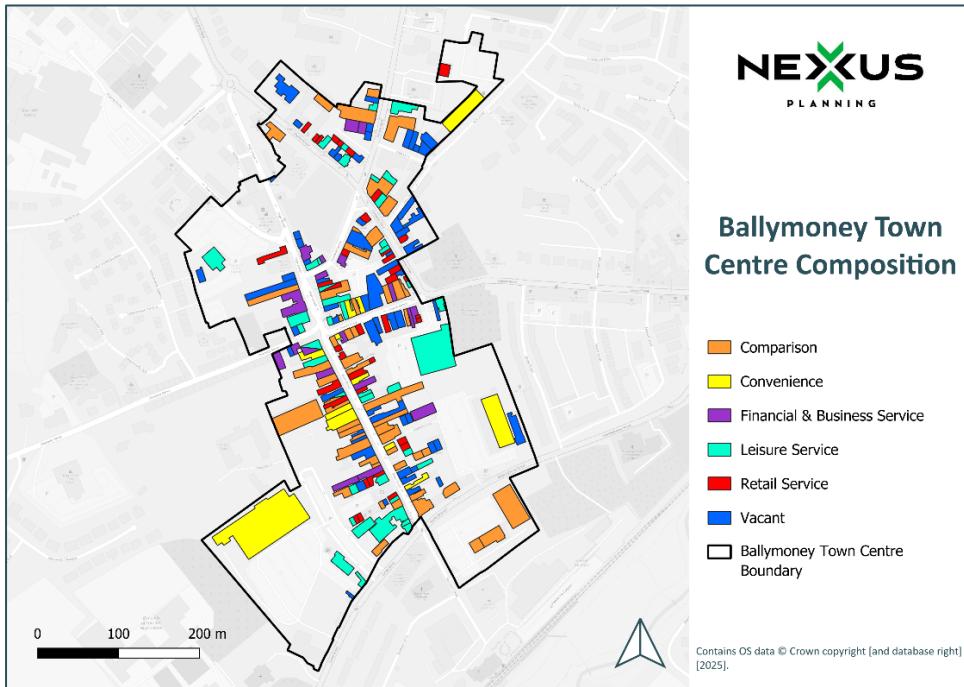
Figure 3.62.1 Photos of Ballymoney



Source: Nexus Site Visit (July 2025)

### Retail Offer

Figure 3.62.2 Ballymoney Town Centre Composition Map



Source: Nexus Site Visit (July 2025)

- 3.63** The composition of Ballymoney's retail offer is detailed in the Figures below. The Centre contains 223 units, making Ballymoney the Borough's third-largest Town Centre in terms of unit numbers, close behind Limavady. This represents an increase from 2016, when 183 units were recorded.
- 3.64** There are 53 comparison units in the centre, representing 23.8% of all units. This is slightly below the UK average of 26.1% and is down from 2016 when this figure was 30.6%.

3.65 The proportion of convenience units within the Ballymoney Town Centre is 5.4% (12 units), which is below the UK average of 9.4%. The convenience offer includes a Tesco and a Lidl, in addition to smaller convenience shops and butchers.

3.66 The services offer is 43.9% (98 units), which is below the UK average of 50.2%. Retail services and financial & business services are broadly in line with the UK average, while leisure services are under-represented by 7.6%.

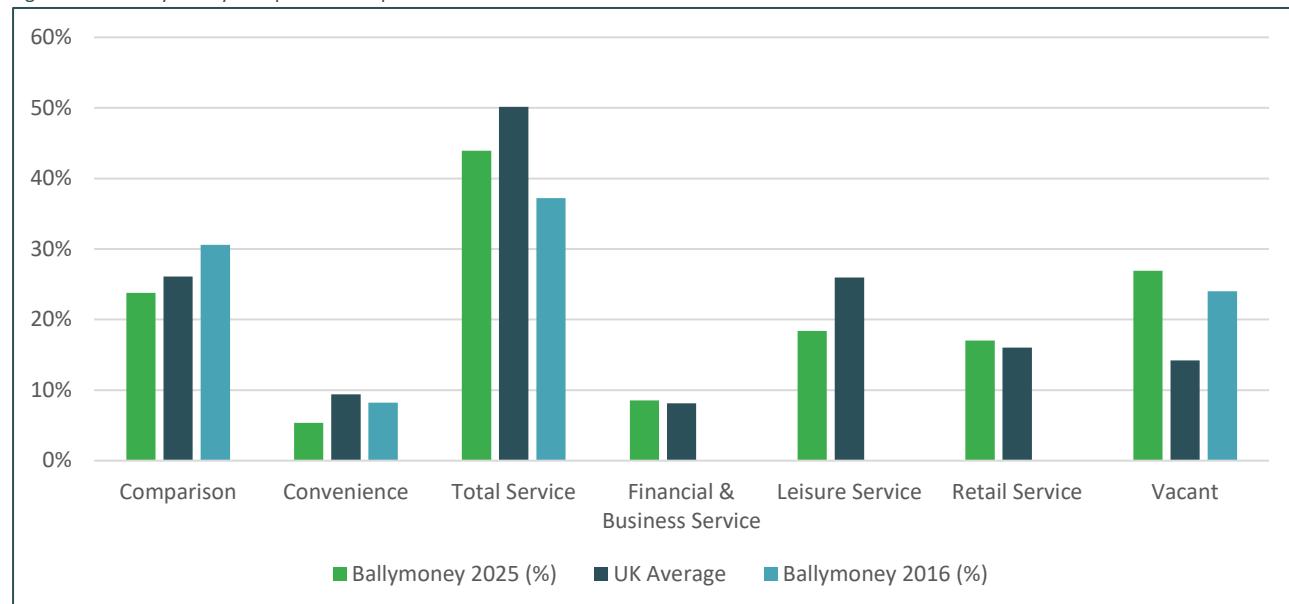
Figure 3.66.1 Ballymoney Composition Table

	2025			2016	
	Ballymoney (No. units)	Ballymoney (%)	UK Average (%)	Ballymoney (No. units)	Ballymoney (%)
<b>Comparison</b>	<b>53</b>	<b>23.8%</b>	<b>26.1%</b>	56	30.6%
<b>Convenience</b>	<b>12</b>	<b>5.4%</b>	<b>9.4%</b>	15	8.2%
<b>Services (total)</b>	<b>98</b>	<b>43.9%</b>	<b>50.2%</b>	68	37.2%
<b>Financial &amp; Business</b>	19	8.5%	8.2%	-	-
<b>Leisure</b>	41	18.4%	26.0%	-	-
<b>Retail</b>	38	17.0%	16.0%	-	-
<b>Vacant</b>	<b>60</b>	<b>26.9%</b>	<b>14.2%</b>	33	24.0%
<b>Total</b>	<b>223</b>	<b>100.0%</b>	<b>100.0%</b>	183	100.0%

Source: Nexus Site Visit (July 2025), Experian Goad Category Report (March 2024)

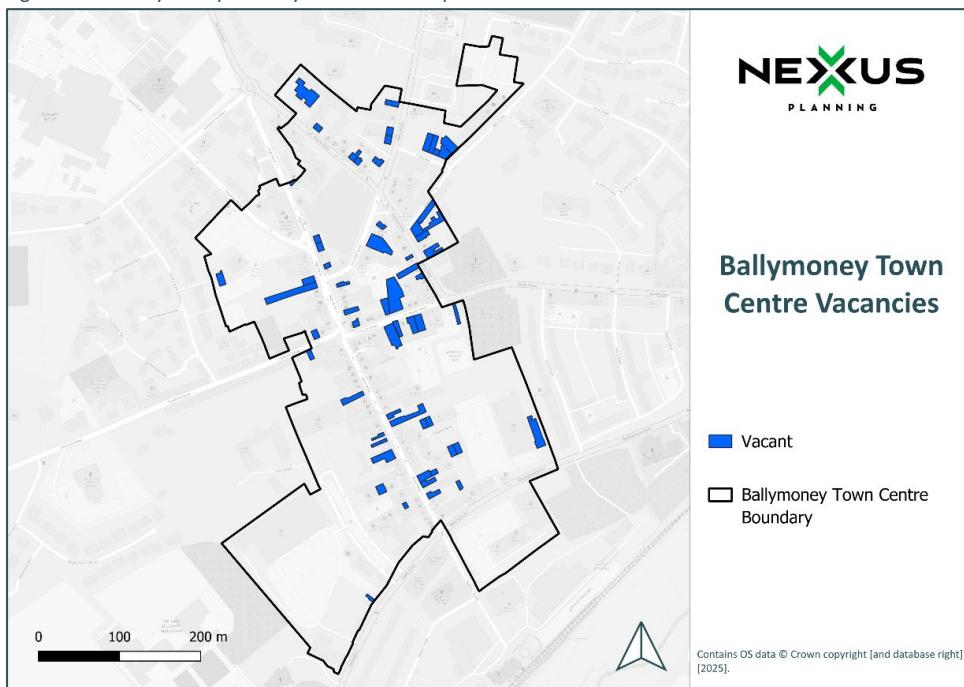
Note: 2016 comparison figures were based on records from Land and Property Services data, where a breakdown of service categories was not available.

Figure 3.66.2 Ballymoney Composition Graph



## Vacant Units

Figure 3.66.3 Ballymoney Vacancy Distribution Map



Source: Nexus Site Visit (July 2025)

**3.67** Ballymoney has 60 vacant units, which constitutes 26.9% of all units in the centre. This is well above the UK average of 14.2%, and is up from 2016, when 24% vacancy was recorded.

**3.68** Vacant units were distributed throughout the centre, with a higher rate of vacancies recorded north of Church Street.

## Visitor Satisfaction

**3.69** 37.1% of survey respondents answered that they visit Ballymoney Town Centre, which makes it the fourth most visited centre in the Borough.

**3.70** 29.1% of survey respondents suggested that the centre is too far from home. 5.6% of respondents commented that there is a lack of choice and range of non-food shops, which may reflect the proportion of comparison units in the centre, which is below national averages. 2.8% of respondents also answered that the centre is not accessible by public transport.

## Community Involvement & Public Investment

**3.71** At the time of our site visits in July 2025, Ballymoney Town Centre was observed to have a friendly, community-oriented character, with activity centred around Main Street, particularly between Castle Street and Church Street. The compact layout and mix of independent shops, services, and civic buildings create a strong sense of local identity and accessibility.

**3.72** Ballymoney Town Hall is located on High Street towards the northern boundary of the Town Centre. The Town Hall serves as the principal venue for community gatherings, cultural activities, and civic events. It also contains a museum which hosts a permanent exhibition showcasing the history of the local area, and a visitor information centre. It was, however, observed to be somewhat removed from the main activity of the town.

- 3.73 Additional community facilities are available beyond the core Town Centre, including Ballymoney Community Resource Centre on Queen Street which provides space for public and voluntary sector use. There are also church-run or youth-club halls available for community-type gatherings or club events within or close to the town centre, such as Cheers Youth Centre on Church Street and St. James' Presbyterian Church on St James Road.
- 3.74 The Town is home to the Ballymoney Country Market, a monthly artisan market typically held in the vicinity of Castlecroft Square, where local producers, artists, and makers showcase goods ranging from fresh produce to crafts. This market is supported by the Council and run by Naturally North Coast & Glens (NNCG) in collaboration with local businesses to encourage footfall and strengthen Ballymoney's role as a hub for both social and economic activity.
- 3.75 The Ballymoney annual Spring Fair is hosted over two days in April, and is organised by Causeway Coast and Glens Borough Council with support from Ballymoney Chamber of Commerce and FUSE FM. Additionally, the annual Ballymoney Agricultural Show is hosted to the west of the town centre boundary at the Ballymoney Showgrounds in June, providing an opportunity for local schools, community groups, businesses and farmers to showcase their produce, skills, livestock, crafts, and achievements to the wider community.

### Footfall

- 3.76 Footfall data for Ballymoney Town Centre has been collected by Springboard to track annual performance trends across 2019, 2023, 2024, and 2025.
- 3.77 As illustrated in the below graph, overall visitor numbers remain relatively stable throughout the year, with a sharp increase in April, coinciding with the annual Spring Fair event. Footfall is generally seen to be highest between March and August, being the warmer months.
- 3.78 During the site visit in July 2025 which took place in the afternoon, it was observed that the busiest area in terms of footfall was along Main Street, between Charlotte Street / Church Street (north) and Castle Street / Meetinghouse Street (south). This primary retail street, while not car-free, was well-accommodating for pedestrians with features such as street flags and flower baskets.

Figure 3.78.1 Ballymoney Footfall Data



Source: Springboard

### Access and Car Parking

- 3.79 Ballymoney Railway Station is located south of the defined centre, which services the Derry-Londonderry Line. The station provides direct access to nearby towns, including Coleraine, Portrush, and Ballymena.

- 3.80 A bus centre is located adjacent to the railway station, and two main bus stops are provided towards the town centre's northern boundary, including at Ballymoney Town Hall and Charles Street. The bus services provide regular services to destinations including Coleraine, Belfast, Ballycastle, and Portrush.
- 3.81 The Centre is reasonably easy to navigate on foot. Seymour Street connects the railway station to the Centre's primary retail street (Main Street), with clearly marked footpaths on both sides of the road.
- 3.82 A minimal amount of cycle parking was observed during the site visits, and cycle lanes were generally absent. On-street car parking was observed to be commonplace along each of the key Town Centre streets, and numerous surface level car parks were available within the Centre boundaries.
- 3.83 A lack of accessibility to the centre via public transport was the third most significant reason preventing people from visiting Ballymoney Town Centre, according to Q32 of the household survey.

#### Environmental Quality

- 3.84 Ballymoney Town Centre presents a mixed picture in terms of environmental quality. The core streets – Main Street and Church Street – retain a traditional market town character, with many shop frontages in reasonable condition and the area appearing generally clean, with minimal litter or graffiti observed. In parts of the Town Centre with lower pedestrian activity, some shopfronts are in poorer repair, with a number of units closed or secured with roller shutters.
- 3.85 Public amenity space provision within the immediate Town Centre is limited. Decorative planting, including intermittent hanging baskets and planted trees, adds some colour and interest, particularly along Main Street. The grounds of St Patrick's Church and Ballymoney Old Graveyard adjoining the Centre's eastern boundary contributes a sense of greenery but offers little in the way of accessible public seating or amenity.
- 3.86 Riverside Park, located just a short distance south-east of the Town Centre, provides a significant public amenity space. With walking paths, play facilities, and riverside views, it enhances the amenity value of the Town Centre by offering accessible green space for recreation within easy reach of the main commercial area.

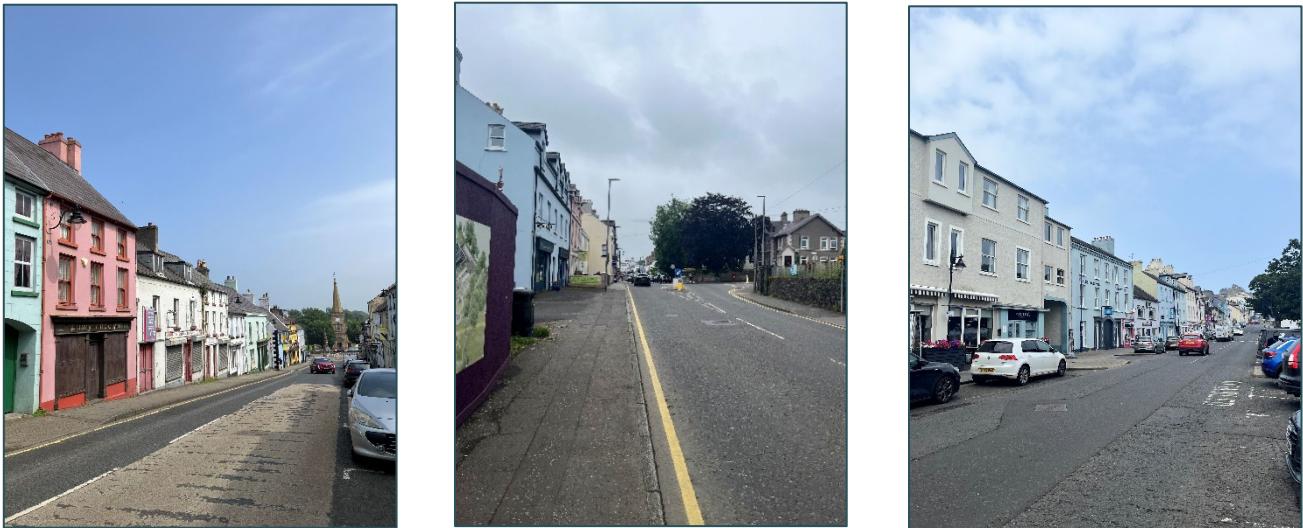
#### Night-time Economy

- 3.87 Ballymoney has 27 hospitality units, including pubs, bars and restaurants, which operate during evening hours. These hospitality units are mostly located along Main Street, Market Street and Church Street.

#### Ballycastle Town Centre

- 3.88 Ballycastle is a small town located on the northeast coast with a seaside location and a large rural hinterland which is predominantly AONB. It is one of the four Main Towns within the Causeway Coast and Glens Borough and is designated as a Local Hub within the Regional Development Strategy 2035 (2012).
- 3.89 Ballycastle is positioned on the A44 transport corridor, making it well connected to the nearby town of Ballymena. The town is also well connected to Coleraine via the A2 and B67 routes. The Centre's primary retail street runs along the A44, comprising Castle Street and Ann Street. A second, smaller segment of the Town Centre exists to the east along North Street, which is segregated from the primary retail street by a distance of approximately 400 metres.
- 3.90 Ballycastle's population at the 2021 Census was recorded to be 5,628. The town experienced a population increase between the 2011 and 2021 Censuses, with a change of +7.5% (391 people).

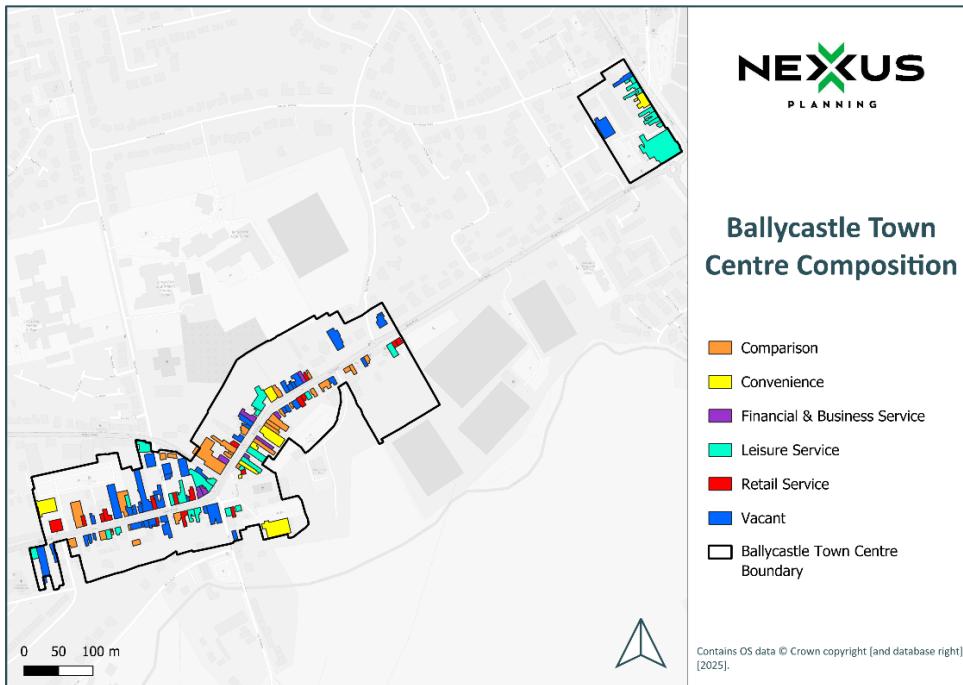
Figure 3.90.1 Photos of Ballycastle



Source: Nexus Site Visit (July 2025)

### Retail Offer

Figure 3.90.2 Ballycastle Town Centre Composition Map



Source: Nexus Site Visit (July 2025)

- 3.91** The composition of Ballycastle's retail offer is detailed in the Figures below. The Centre contains 131 units, representing an increase from 2016, when 120 units were recorded.
- 3.92** There are 30 comparison units in the centre, representing 22.9% of all units. This is slightly below the UK average of 26.1% and is down from 2016 when this figure was 27.5%.

3.93 The proportion of convenience units within the Ballycastle Town Centre is 6.1% (8 units), which is below the UK average of 9.4%. The convenience offer includes a Co-op and a Spar, in addition to smaller convenience shops and butchers.

3.94 The services offer is 41.2% (54 units), which is below the UK average of 50.2%. All service sub-categories are under-represented when compared to the UK average, with leisure services seeing the greatest margin of 4.6%.

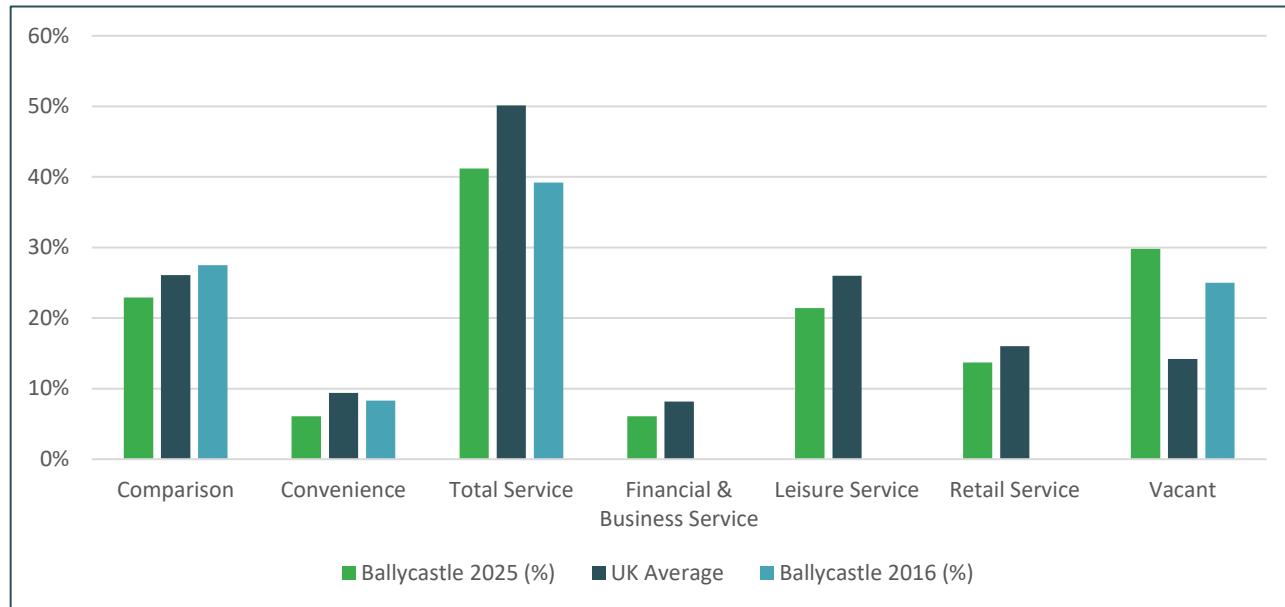
Figure 3.94.1 Ballycastle Composition Table

	2025			2016	
	Ballycastle (No. units)	Ballycastle (%)	UK Average (%)	Ballycastle (No. units)	Ballycastle (%)
<b>Comparison</b>	<b>30</b>	<b>22.9%</b>	<b>26.1%</b>	33	27.5%
<b>Convenience</b>	<b>8</b>	<b>6.1%</b>	<b>9.4%</b>	10	8.3%
<b>Services (total)</b>	<b>54</b>	<b>41.2%</b>	<b>50.2%</b>	47	39.2%
<b>Financial &amp; Business</b>	8	6.1%	8.2%	-	-
<b>Leisure</b>	28	21.4%	26.0%	-	-
<b>Retail</b>	18	13.7%	16.0%	-	-
<b>Vacant</b>	<b>39</b>	<b>29.8%</b>	<b>14.2%</b>	30	25%
<b>Total</b>	<b>131</b>	<b>100.0%</b>	<b>100.0%</b>	120	100.0%

Source: Nexus Site Visit (July 2025), Experian Goad Category Report (March 2024)

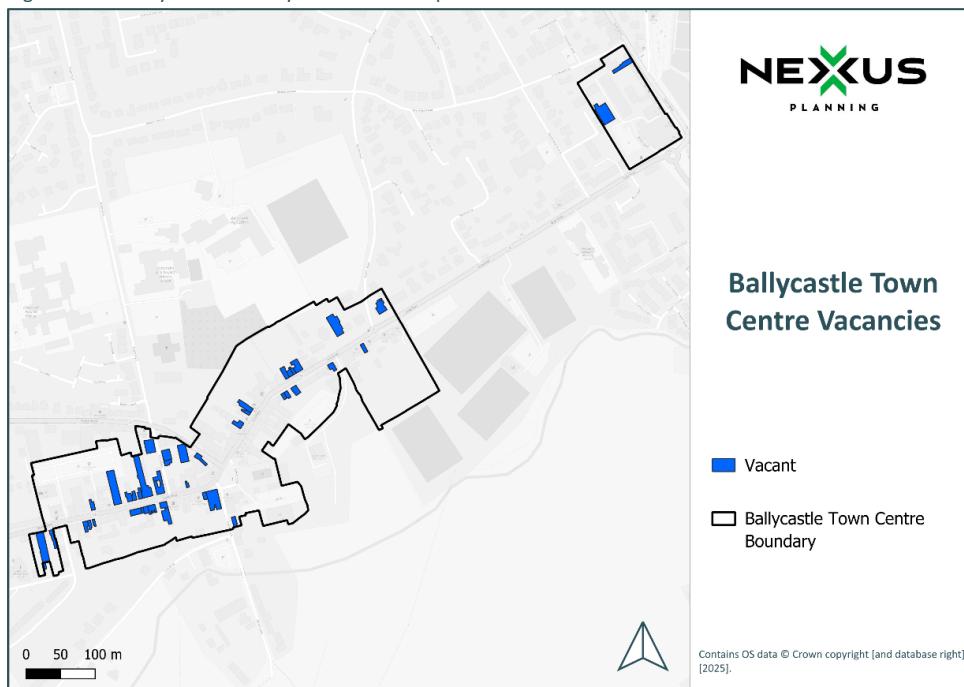
Note: 2016 comparison figures were based on records from Land and Property Services data, where a breakdown of service categories was not available.

Figure 3.94.2 Ballycastle Composition Graph



## Vacant Units

Figure 3.94.3 Ballycastle Vacancy Distribution Map



Source: Nexus Site Visit (July 2025)

- 3.95 Ballycastle has 39 vacant units, which constitutes 29.8% of all units in the centre and is the highest rate recorded of the six towns surveyed. This is well above the UK average of 14.2%, and is up from 2016, when 25% vacancy was recorded.
- 3.96 Vacancies were generally clustered along Castle Street within the western extent of the town centre. Vacancies were also recorded along Ann Street and North Street, though to a lesser extent.

## Visitor Satisfaction

- 3.97 Only 25.5% of respondents to the household survey answered that they visit Ballycastle, which makes it, by some distance, the least visited of the centres in the Borough.
- 3.98 39.2% of respondents suggested that it was too far from home, which may reflect the remoteness of the centre relative to the other centres in the Borough. Another 3.9% of respondents said that the lack of choice and range of non-food shops was the primary reason for not visiting the centre.

## Community Involvement & Public Investment

- 3.99 Whilst the Centre does not have a formal Town Hall, the Shesburn Community and Recreation Centre, located just outside of the Town Centre boundary, is run by the Borough Council and is used for community meetings, events, and council-linked activities.
- 3.100 Additionally, the Ballycastle Community Hub provides a small community centre focussed on waste reduction, sustainability and locally sourced produce to deliver a safe, inclusive and welcoming café space for all. It provides an informal meeting place for the community. The Community Hub is located on Castle Street within the Town Centre and operates in association with the Courtyard Café.

- 3.101 The Borough Council works with Naturally North Coast & Glens (NNCG) and local businesses to operate the Ballycastle Seafront Artisan Market, which boasts participation of around 60 small businesses and encourages the local community and visitors to come together to enjoy great food and creativity.
- 3.102 Ballycastle also hosts the annual Rathlin Sound Festival, which is run in collaboration between Rathlin Development & Community Association, and Causeway Coast & Glens Borough Council and takes place in late May / early June each year. The celebration is hosted in both Ballycastle and Rathlin Island, and features a mix of live music, cookery demos, crafts, falconry, talks, hands-on activities, and an artisan market featuring local makers and producers.
- 3.103 On the weekend of the August bank holiday each summer, Ballycastle hosts the Ould Lammas Fair, being Ireland's oldest traditional fair. The fair is organised by Causeway Coast & Glens Borough Council in collaboration with local community groups, and local traders and businesses. It features street trading, bargaining, traditional music, dancing, horse trading, artisan markets and more.
- 3.104 The two aforementioned events bring significant footfall to Ballycastle, which is evidenced by the recorded data discussed in more detail below.

### Footfall

- 3.105 Footfall data for Ballycastle Town Centre has been collected by Springboard to track annual performance trends over 2019, 2023, 2024, and 2025.
- 3.106 The data shows that the Centre experiences a greater number of visitors between the warmer months of May to August, with the highest footfall being in August, coinciding with the Ould Lammas Fair. It is also evident that footfall in Ballycastle has not returned to the 2019 (pre-Covid-19) levels.
- 3.107 During the July 2025 site visit which took place around lunch time, pedestrian activity in the town centre was generally low, with particularly limited footfall along Castle Street, where vacancy levels were higher. In contrast, North Street showed greater activity, supported by a higher concentration of hospitality venues within a compact area. However, the connecting footpaths between these two parts of the town centre appeared underused. These observations suggest that people may visit the Town Centre to enjoy the hospitality offerings along the seafront retail strip of North Street without extending their trips to Ann Street or Castle Street.

Figure 3.107.1 Ballycastle Footfall Data



Source: Springboard

### Access and Car Parking

- 3.108 Ballycastle Town Centre is serviced by numerous bus routes, with the Centre's main bus stop being located at the corner of North Street opposite the Marine Hotel. Regular services are provided to Coleraine, Ballymoney, and Ballymena, in addition to smaller nearby towns.
- 3.109 Ballycastle is not serviced by a railway station, with the nearest stations being in Coleraine and Ballymoney which are both connected by the bus network. Despite this, 2.4% of household survey respondents answered that the centre is not accessible by public transport.
- 3.110 The Centre is straightforward to navigate on foot, with clearly defined footpaths throughout. However, signage between North Street and Ann Street / Castle Street is limited, which may result in reduced pedestrian movement between the two areas.
- 3.111 No segregated cycle lanes or cycle parking were observed within the town's boundaries.
- 3.112 Numerous public car parks were distributed throughout the Town Centre, and street parking was widely available.

### Environmental Quality

- 3.113 The environmental quality of Ballycastle is generally high, with its coastal setting, attractive seafront, and surrounding natural landscapes providing a strong backdrop to the Town Centre. While some areas, particularly Castle Street, are negatively affected by vacant and poorly maintained properties, the wider town benefits from clean public spaces, coastal views, and proximity to well-kept recreational areas. These features contribute positively to the overall character of the Town Centre despite the challenges associated with low footfall and shop vacancies.
- 3.114 Although public amenity and green space within the Town Centre itself is limited, there are substantial recreational areas located immediately adjacent to its boundaries. These include Quay Road Park, Ballycastle Playing Fields, the Seafront and Play Park, and Ballycastle Beach. Given the compact scale of the Town Centre, these facilities are all accessible by foot.

### Night-time Economy

- 3.115 Ballycastle has 28 hospitality units, including pubs, bars and restaurants, which operate during evening hours. These units are dispersed throughout the Centre, along North Street, Ann Street, Castle Street, and The Diamond.

### Portrush Town Centre

- 3.116 Portrush is a satellite community town located on the northern coast with a seaside location. The town has a locally important commercial function, and, due to its size, effectively functions as part of a larger major sub-regional centre in correlation with Coleraine and the neighbouring town of Portstewart. The town is connected to Coleraine via the A29 network route, and to Portstewart via the A2 network route. Its primary retail street runs along Main Street and Eglinton Street.
- 3.117 Portrush is the Region's most important tourist centre and is the hub for a number of major annual sporting and leisure events, including the British Open Golf tournament which was most recently hosted in July 2025. The Town is also a site of National Nature Conservation Importance.
- 3.118 Portrush's population at the 2021 Census was recorded to be 6,150. The town experienced a population increase between the 2011 and 2021 Censuses, with a change of +4.5% (292 people). In addition, we note that there are a number of

caravan parks within proximity to the Town Centre, which would likely result in temporary population increases during certain times of the year (ie. summer months).

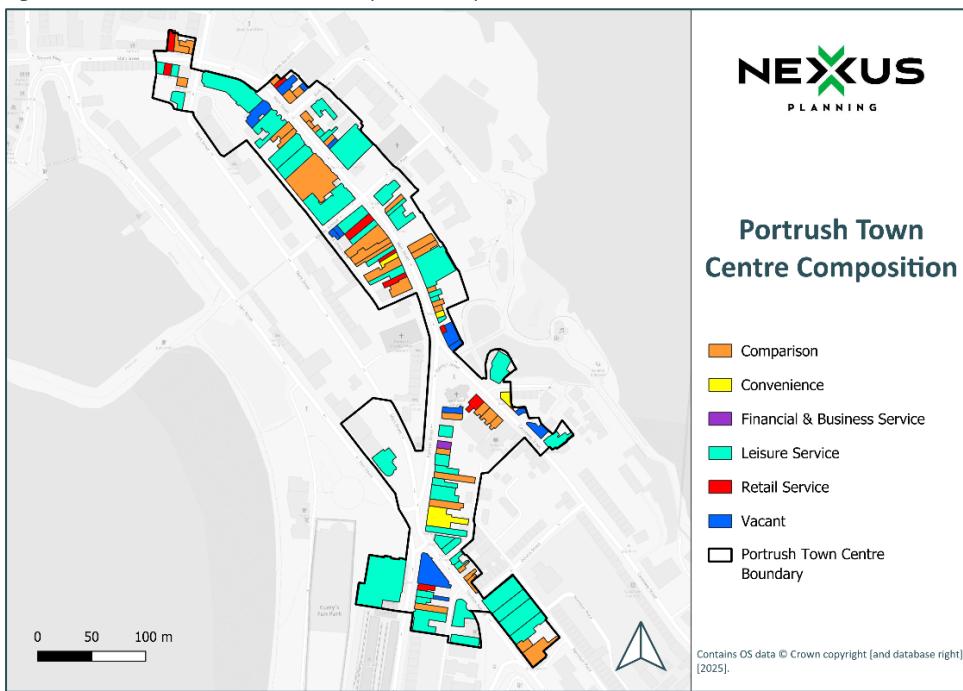
Figure 3.118.1 Photos of Portrush



Source: Nexus Site Visit (July 2025)

### Retail Offer

Figure 3.118.2 Portrush Town Centre Composition Map



Source: Nexus Site Visit (July 2025)

**3.119** The composition of Portrush's retail offer is detailed in the Figures below. The Centre contains 111 units, which has remained stable since 2016.

- 3.120 There are 37 comparison units in the centre, representing 33.3% of all units. This is above the UK average of 26.1% and is marginally up from 2016 when this figure was 32.4%.
- 3.121 The proportion of convenience units within the Portrush Town Centre is 3.6% (4 units), which is well below the UK average of 9.4%. The convenience offer includes a Spar, in addition to a bakery and an off-licence store.
- 3.122 The services offer is 51.4% (57 units), which is only marginally above the UK average of 50.2%. Leisure services were recorded to be 15.4% above the UK average, while retail services and financial & business services were significantly below the average with only 1 unit (0.9%) of the latter recorded.

Figure 3.122.1 Portrush Composition Table

	2025			2016	
	Portrush (No. units)	Portrush (%)	UK Average (%)	Portrush (No. units)	Portrush (%)
<b>Comparison</b>	<b>37</b>	<b>33.3%</b>	<b>26.1%</b>	36	32.4%
<b>Convenience</b>	<b>4</b>	<b>3.6%</b>	<b>9.4%</b>	13	11.7%
<b>Services (total)</b>	<b>57</b>	<b>51.4%</b>	<b>50.2%</b>	50	45%
<i>Financial &amp; Business</i>	1	0.9%	8.2%	-	-
<i>Leisure</i>	46	41.4%	26.0%	-	-
<i>Retail</i>	10	9.0%	16.0%	-	-
<b>Vacant</b>	<b>13</b>	<b>11.7%</b>	<b>14.2%</b>	12	10.8%
<b>Total</b>	<b>111</b>	<b>100.0%</b>	<b>100.0%</b>	111	100%

Source: Nexus Site Visit (July 2025), Experian Goad Category Report (March 2024)

Note: 2016 comparison figures were based on records from Land and Property Services data, where a breakdown of service categories was not available.

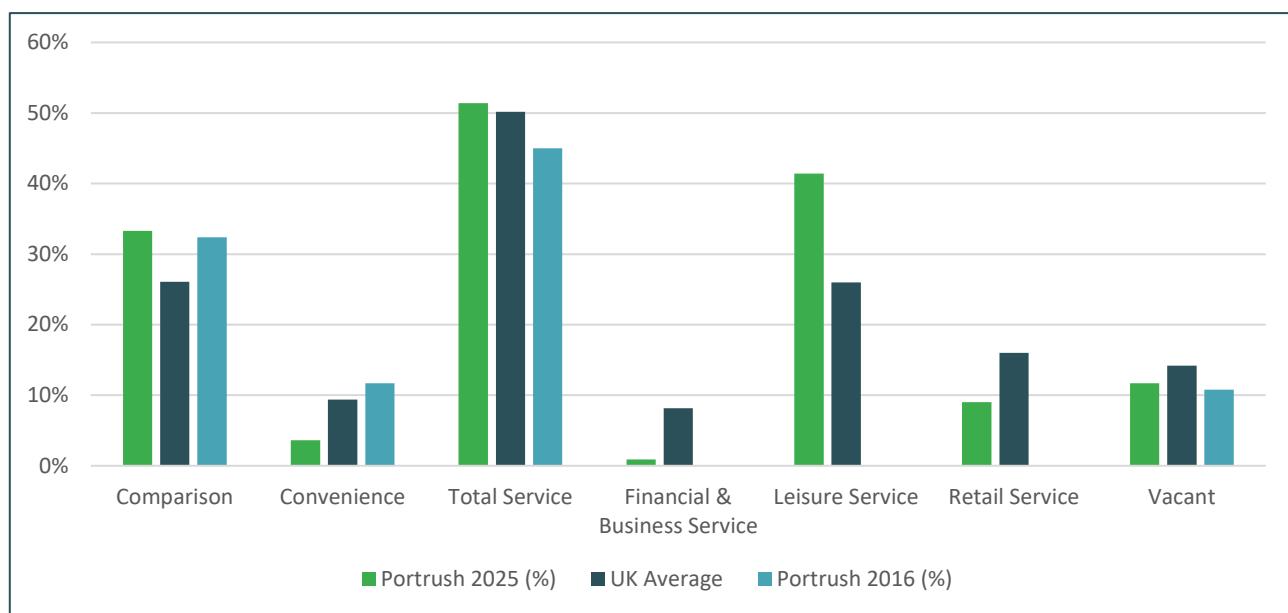
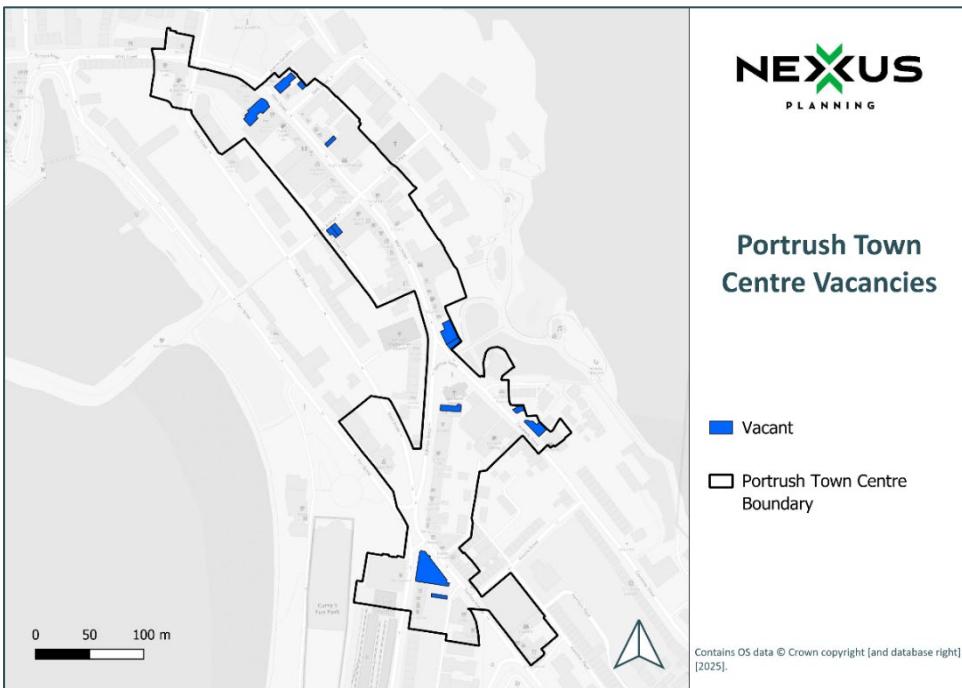


Figure 3.122.2 Portrush Composition Graph

### Vacant Units

Figure 3.122.3 Portrush Vacancy Distribution Map



Source: Nexus Site Visit (July 2025)

- 3.123** Portrush has 13 vacant units, which constitutes 11.7% of all units in the centre. This is below the UK average of 14.2%, and is up from 2016, when 10.8% vacancy was recorded. Of the six towns reviewed as part of this study, Portrush is the only town which recorded vacancies lower than the UK average. No particular concentrations of vacant units were identified.

### Visitor Satisfaction

- 3.124** According to Q26 of the household survey, 43.7% of respondents answered that they visit Portrush. This makes it the second most visited centre in the Borough, after Coleraine.
- 3.125** 6.8% of survey respondents answered that there is a lack of choice and range in non-food shops, and another 3.8% of respondents answered that there is a lack of choice and range in food shops. Additionally, 3.3% suggested that it is too busy, and another 2.8% suggested that there is too much traffic congestion, both of which may suggest that the centre is too crowded by cars and pedestrians.

### Community Involvement & Public Investment

- 3.126** Portrush thrives on strong community involvement supported by public investment in events and infrastructure, with recent improvements driven by preparations for The Open 2025 golf championship creating lasting benefits for residents and visitors alike.

- 3.127 The Portrush Town Hall, positioned at the intersection of Mark Street and Kerr Street, provides a versatile venue space which can be booked for community events, exhibitions, and performances. It is a distinguished listed building, featuring various flexible event and meeting spaces. Within the Town Centre, the Portrush Playhouse Complex offers also a large multi-purpose auditorium, which can be used by the community for film screenings, exhibitions, and private events.
- 3.128 Additional community facilities are available beyond the immediate Town Centre, including Arcadia, an ocean-front event space, and Portrush Youth Centre, a dedicated youth facility offering programmes and informal community gatherings.
- 3.129 Portrush hosts a wide variety of community-focused events each year, delivered through collaboration between local groups, businesses, and the Borough Council. These include fairs, festivals, parades, exhibitions, and markets, most of which take place between May and October.
- 3.130 The combination of local engagement and government support has strengthened Portrush's resilience and appeal. By pairing community-led initiatives with sustained investment, the town continues to thrive as a place that values its heritage, supports its residents, and maintains its position as a vibrant seaside destination.

### Footfall

- 3.131 Footfall data for Portrush Town Centre has been collected by Springboard to track annual performance trends between 2022 and 2025.
- 3.132 The graph below shows peak trends which generally coincide with holiday periods. There were also higher-than-average footfall trends recorded during late 2022 and into early 2023, which may possibly indicate a strong rebound following impacts from Covid-19.
- 3.133 The site visit took place in the morning of 25<sup>th</sup> July 2025 indicated strong pedestrian activity in the Town Centre, with steady footfall during the day and a relatively robust night-time economy.

Figure 3.133.1 Portrush Footfall Data



Source: Springboard

### Access and Car Parking

- 3.134 Portrush Railway Station is located immediately to the south of the defined centre, which services the Derry-Londonderry Line and provides direct access to Coleraine.
- 3.135 The main bus hub in Portrush is on Dunluce Avenue, a short walk from Main Street and the railway station. It is served by bus routes which provide connections to Coleraine, Portstewart, Ballycastle, and other smaller towns.

- 3.136 The Centre is generally easy to navigate on foot, with Eglinton Street providing a direct link between the railway station and Main Street, supported by clearly defined footpaths. From the station there is also clear visibility and pedestrian access towards Curry's Fun Park and the waterfront beyond. However, the site visit highlighted that directions to the waterfront – one of Portrush's key assets – is poorly signposted within the retail core. The town centre itself appeared inward facing, with limited visual or functional connection to the town's adjoining natural landscapes, which remains a major draw for visitors.
- 3.137 A minimal amount of cycle parking was observed during the site visits, and cycle lanes were absent. On-street car parking was observed to be commonplace within the Town Centre, and surface level car parks were available for public parking to the north and south of the Centre boundaries.
- 3.138 Responses to the household survey suggest that traffic congestion is an issue in the centre, it is not easily accessible via public transport, and that car parking is inconveniently located.

### Environmental Quality

- 3.139 The overall environmental quality of Portrush Town Centre was assessed as generally very good, with most shop frontages in good condition and the central areas appearing clean and well-maintained. A small number of derelict or poorly maintained buildings were noted towards the peripheries of the Centre's boundaries, but these were limited in number and did not significantly detract from the overall quality of the Town Centre.
- 3.140 Public amenity and green spaces within the Town Centre boundaries are limited, however, there are substantial areas available for public enjoyment surrounding the Centre which are highly accessible and cater to all age groups. These include (but are not limited to) Antim Gardens and Portrush Recreation Grounds to the north, East Strand Beach to the east, Dunluce Park to the south, and West Strand Beach to the west. Given the compact scale of the Town Centre, these spaces are all accessible by foot.

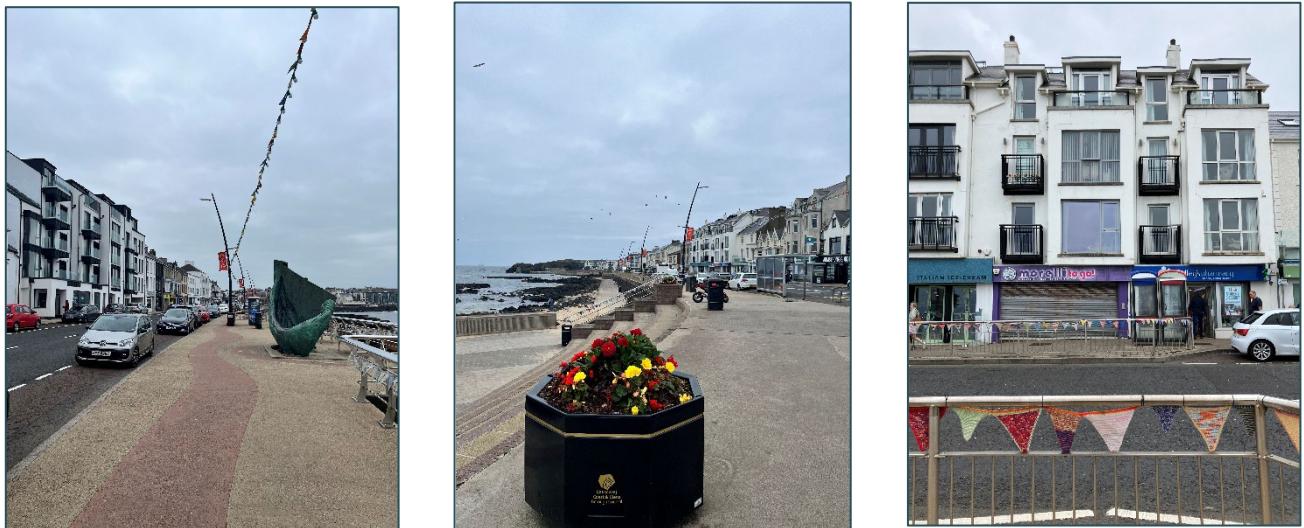
### Night-time Economy

- 3.141 Portrush has 32 hospitality units, including numerous pubs, bars and restaurants, which operate during evening hours. These hospitality units are mostly located along Main Street and Eglinton Avenue.
- 3.142 A number of hospitality units were also identified along the western and southern extensions of Main Street, adjacent to Portrush Harbour. While these units lie outside the defined Town Centre boundary, they nevertheless contribute to the night-time economy and enhance the overall vitality of the Town Centre.

### Portstewart Town Centre

- 3.143 Located on the northern coast, to the west of Portrush and north of Coleraine, Portstewart is the smallest of the towns (by number of retail units) considered in this Study.
- 3.144 The Town has a locally important commercial function, and, due to its size, effectively functions as part of a larger major sub-regional centre in correlation with Coleraine and the neighbouring town of Portrush. The town is connected to Coleraine and Portrush via the A2 network route. Its primary retail street runs along The Promenade, which is oriented to face the coastline.
- 3.145 Portstewart's population at the 2021 Census was recorded to be 7,854. The town experienced a small population decrease between the 2011 and 2021 Censuses, with a change of -1.9% (149 people).

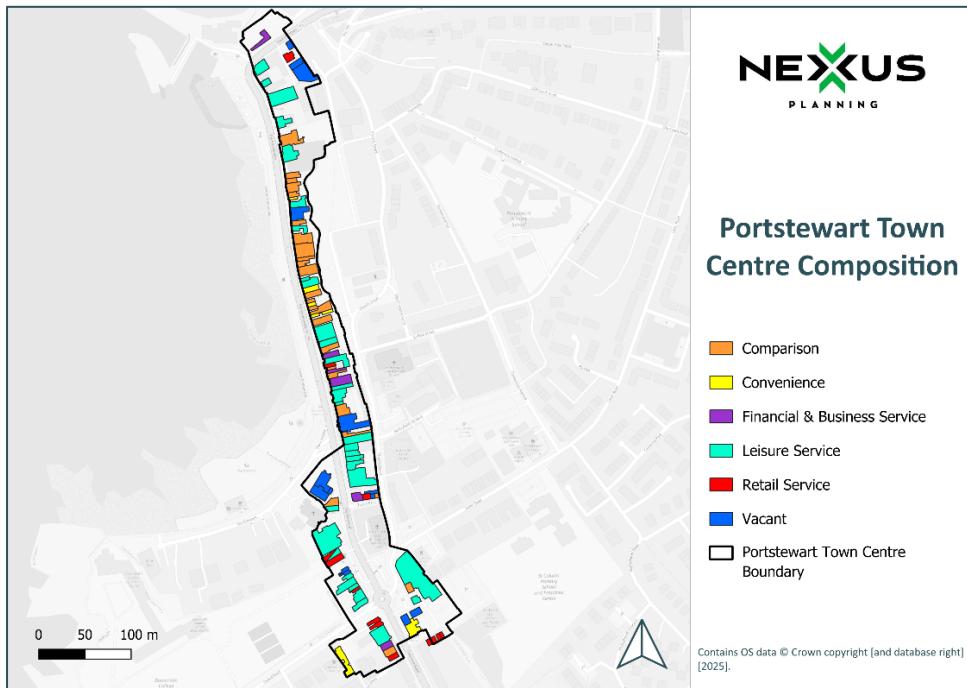
Figure 3.145.1 Photos of Portstewart



Source: Nexus Site Visit (July 2025)

### Retail Offer

Figure 3.145.2 Portstewart Town Centre Composition Map



Source: Nexus Site Visit (July 2025)

- 3.146** The composition of Portstewart's retail offer is detailed in the Figures below. The Centre contains 96 units, which has increased since 2016 when 80 units were recorded. Portstewart is therefore the smallest Town Centre with regard to unit numbers of those surveyed.

3.147 There are 25 comparison units in the Centre, representing 26% of all units. This is broadly in line with the UK average of 26.1% and is down from 2016 when this figure was 32.5%. The comparison units are generally clustered centre-north along The Promenade.

3.148 The proportion of convenience units within the Portstewart Town Centre is 6.3% (6 units), which is above the UK average of 9.4%. The convenience offer includes a Spar, in addition to smaller convenience shops including bakeries and a butcher.

3.149 The services offer is 53.1% (51 units), which is above the UK average of 50.2%. Leisure services were recorded to be 7.3% above the UK average, while retail services and financial & business services were below the average.

Figure 3.149.1 Portstewart Composition Table

	2025			2016	
	Portstewart (No. units)	Portstewart (%)	UK Average (%)	Portstewart (No. units)	Portstewart (%)
<b>Comparison</b>	<b>25</b>	<b>26.0%</b>	<b>26.1%</b>	26	32.5%
<b>Convenience</b>	<b>6</b>	<b>6.3%</b>	<b>9.4%</b>	8	10.0%
<b>Services (total)</b>	<b>51</b>	<b>53.1%</b>	<b>50.2%</b>	37	46.3%
<b>Financial &amp; Business</b>	6	6.3%	8.2%	-	-
<b>Leisure</b>	32	33.3%	26.0%	-	-
<b>Retail</b>	13	13.5%	16.0%	-	-
<b>Vacant</b>	14	14.6%	14.2%	9	11.3%
<b>Total</b>	<b>96</b>	<b>100.0%</b>	<b>100.0%</b>	80	100.0%

Source: Nexus Site Visit (July 2025), Experian Goad Category Report (March 2024)

Note: 2016 comparison figures were based on records from Land and Property Services data, where a breakdown of service categories was not available.

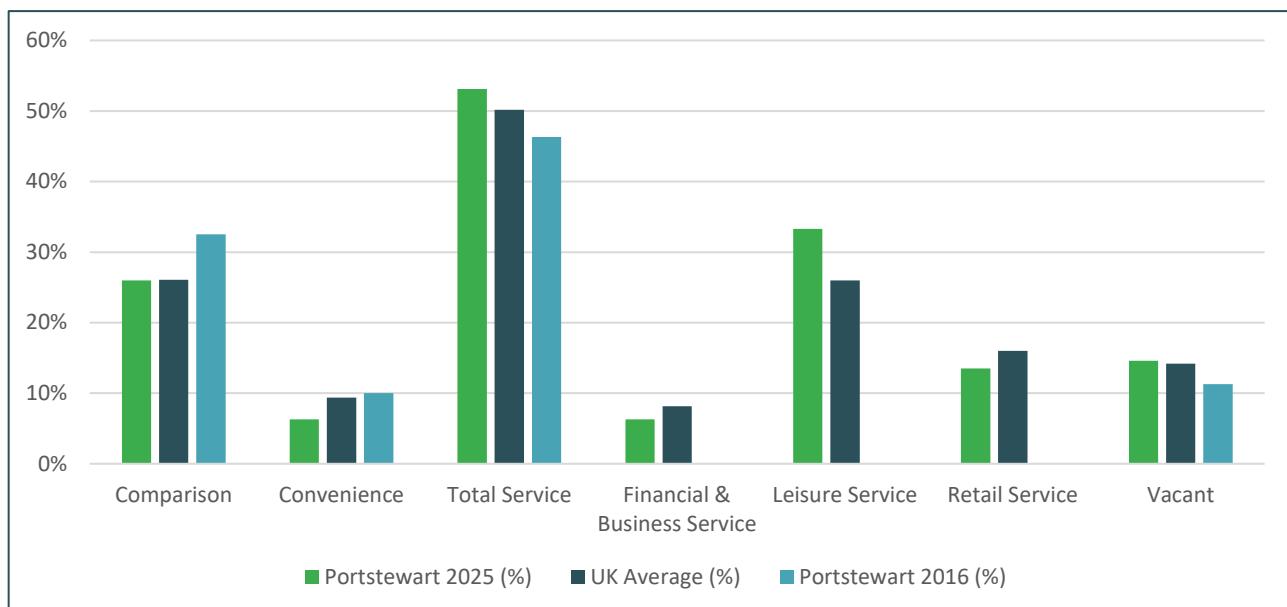
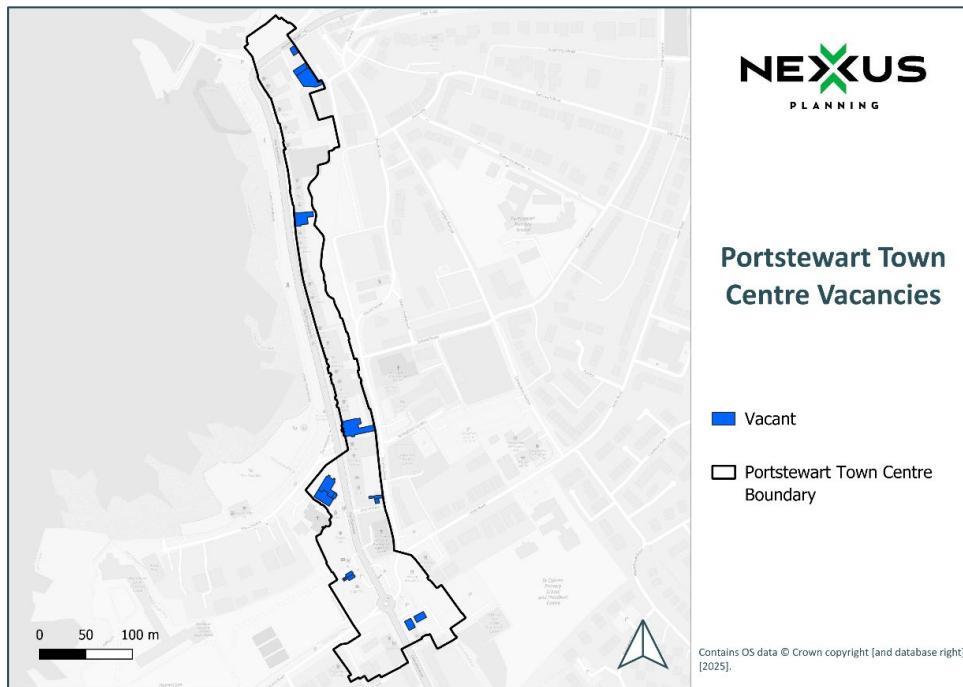


Figure 3.149.2 Portstewart Composition Graph

### Vacant Units

Figure 3.149.3 Portstewart Vacancy Distribution Map



Source: Nexus Site Visit (July 2025)

- 3.150 Portstewart has 14 vacant units, which constitutes 14.6% of all units in the centre. This is marginally above the UK average of 14.2%, and is up from 2016, when 11.3% vacancy was recorded. No particular concentrations of vacant units were identified.

### Visitor Satisfaction

- 3.151 According to Q26 of the household survey, 40.5% of respondents answered that they visit Portstewart. This makes it the third most visited centre in the Borough.
- 3.152 6.2% of survey respondents who do not visit Portstewart answered that there is a lack of choice and range in non-food shops, and another 3.8% of respondents answered that there is a lack of choice and range in food shops. Additionally, 3.4% suggested that there is too much traffic congestion, and another 2.4% suggested that it is not accessible by public transport, both of which may suggest that transport and accessibility is an issue preventing people from visiting the centre.

### Community Involvement & Public Investment

- 3.153 Portstewart boasts a vibrant and engaged community alongside public investment that together have enhanced the Town's vitality and appeal. The Portstewart Community Association (PCA) is run entirely by volunteers, which leads a wide range of inclusive events and initiatives such as the annual Red Sails Festival and regular litter-picks, promoting local pride and environmental stewardship.

3.154 Portstewart also benefited from funding provided by Causeway Coast and Glens Borough Council and the Department for Communities, which enabled the completion of the major Portstewart Promenade Regeneration project in 2016. The project enhanced the promenade to create a safer and cleaner environment for visitors and residents, which aimed to sustain the area's tourism appeal.

3.155 During the site visit in July 2025, community pride was evident along the promenade, with hand-knitted flags lining the pedestrian footpaths and a clean environment observed.

3.156 The Portstewart Town Hall has been closed since 2019, and as a result, community events have transitioned to a range of alternative venues within the town's boundary as well as some venues within a short walking distance. These include (but are not limited to) St John's Church Hall, Star of the Sea Parish Centre, and Portstewart Guide Hall.

3.157 Portstewart hosts a wide variety of community-focused events each year, delivered through collaboration between local groups, businesses, and the Borough Council. These include festivals, beach cleans, park runs, Christmas events, and more. The flagship community event is the Red Sails Festival held annually in late July, which features over 80 free events and attracts a large number of visitors to the town.

### Footfall

3.158 Footfall data for Portstewart Town Centre has been collected by Springboard to track annual performance trends between 2022 and 2025.

3.159 The graph below shows peak trends which generally coincide with holiday periods. There were also higher-than-average footfall trends recorded during late 2022 and into early 2023, which may possibly indicate a strong rebound following impacts from Covid-19. The graph also shows a peak in footfall around late July, and into August, which coincides with the Red Sails Festival and into the summer school holiday period.

3.160 The site visits took place in the morning of 24th July 2025, being the fourth day of the Red Sails Festival. Pedestrian activity in the Town Centre during this time was observed to be reasonably high.

Figure 3.160.1 Portstewart Footfall Data



Source: Springboard

### Access and Car Parking

3.161 Portstewart Town Centre is serviced by local and intercity bus routes, with bus stops conveniently located within and close to the Centre. Regular services are provided to Coleraine and Portrush.

- 3.162 The Town Centre is easy to navigate on foot, with the main retail area contained along one continuous street, being The Diamond (south), The Promenade (centre), and Harbour Road (north). Footpaths are clearly marked and provide generous space for pedestrians, particularly along The Promenade.
- 3.163 Some cycle parking along The Promenade was observed during the site visits, though marked cycle lanes were noted to be absent.
- 3.164 On-street car parking was common within the Town Centre, and some dedicated public car parking was available within and close to the Centre's boundaries.
- 3.165 As discussed at 3.152, survey respondents cited public transport accessibility and traffic congestion as issues in the centre.

### Environmental Quality

- 3.166 The overall environmental quality of Portstewart Town Centre was assessed as very good, with most shop frontages in good condition and the central areas appearing clean and well-maintained. A small number of vacant or poorly maintained buildings were noted throughout the Centre, but these were limited in number and did not significantly detract from the overall quality of the Town Centre.
- 3.167 While public amenity and green space within the Town Centre is limited, the Promenade offers expansive views of the waterfront and a part of the Northern Ireland and Ireland coastline, showcasing its seafront character. Seating along the pedestrian route further encourages people to stop, rest, and appreciate the setting. In addition, public amenity spaces within proximity of the Town Centre provide areas for recreation, including Cashlandoo Park to the south, The Warren to the east, and Portstewart Strand to the west.

### Night-time Economy

- 3.168 Portstewart has 31 hospitality units, including numerous pubs, bars and restaurants, which operate during evening hours. These hospitality units are mostly located along The Promenade.

### Health Check Conclusions

- 3.169 The six town centres assessed each perform distinct roles within the Causeway Coast and Glens Borough, with varying levels of vitality and viability reflecting their size, function, and catchment. Collectively, the health checks reveal a borough-wide pattern of mixed performance, characterised by strong environmental quality and community identity but challenged by higher-than-average vacancy rates and slow footfall recovery since the Covid-19 pandemic.
- 3.170 **Coleraine**, as the Borough's principal centre, continues to function as the main retail and service hub. It benefits from strong accessibility, a pedestrian-friendly core, and regular community events. However, its vacancy rate (28.4%) is among the highest of the centres surveyed, and its unit mix has become more service-based with reduced convenience and comparison representation. While footfall is steady, it has yet to return to pre-pandemic levels.
- 3.171 **Limavady** demonstrates good local character and community cohesion centred around Market Street but faces elevated vacancy (22.7%). Footfall levels remain stable but modest, and environmental quality is reasonable though variable towards the edges of the centre.
- 3.172 **Ballymoney** performs similarly to Limavady in terms of scale and function, offering a compact and community-focused centre with a pleasant traditional character. However, it also records high vacancy (26.9%), suggesting ongoing challenges

in attracting and retaining businesses. Footfall is moderate, peaking around key events such as the Spring Fair, reflecting the town's strong community engagement and event-led vibrancy.

- 3.173 **Ballycastle** presents a more pronounced contrast between its high environmental quality and the highest vacancy rate (29.8%) of all centres surveyed. Its coastal setting, major annual events (such as the Ould Lammas Fair), and seasonal tourism bring periodic spikes in activity, yet low off-peak footfall and fragmentation between the inland and seafront areas of the town centre remain weaknesses.
- 3.174 **Portrush** stands out as the Borough's strongest performer in terms of vitality and tourism-driven resilience. It has the lowest vacancy rate (11.7%), strong seasonal footfall, and a robust leisure and comparison offer. Public investment ahead of The Open 2025 evidently improved its appearance and infrastructure. However, limited convenience units and retail services, and a lack of perceived variety in the range of food and non-food shops available slightly constrain its year-round performance.
- 3.175 **Portstewart** similarly benefits from a strong visitor and community identity, with a near-average vacancy rate (14.6%) and consistently good environmental quality along the Promenade. Footfall is seasonally buoyant, peaking during the Red Sails Festival and summer months, though a lack of rail transport links and limited diversity of non-food shops affect its off-peak appeal.
- 3.176 In **summary**, while the coastal centres (Portrush, Portstewart, Ballycastle) benefit from attractive environments, tourism appeal, and community vibrancy, they experience greater variance in seasonality and differing retail performance. The inland centres (Coleraine, Limavady, Ballymoney) have greater footfall stability and are more accessible by public transport, but challenged by unit vacancies and declining comparison units. Across the Borough, investment in placemaking, connectivity, and adaptive reuse of vacant units, alongside continued community engagement and event programming, will be key to strengthening overall vitality and sustaining long-term town centre resilience.

## 4. Market Share and Capacity Assessment

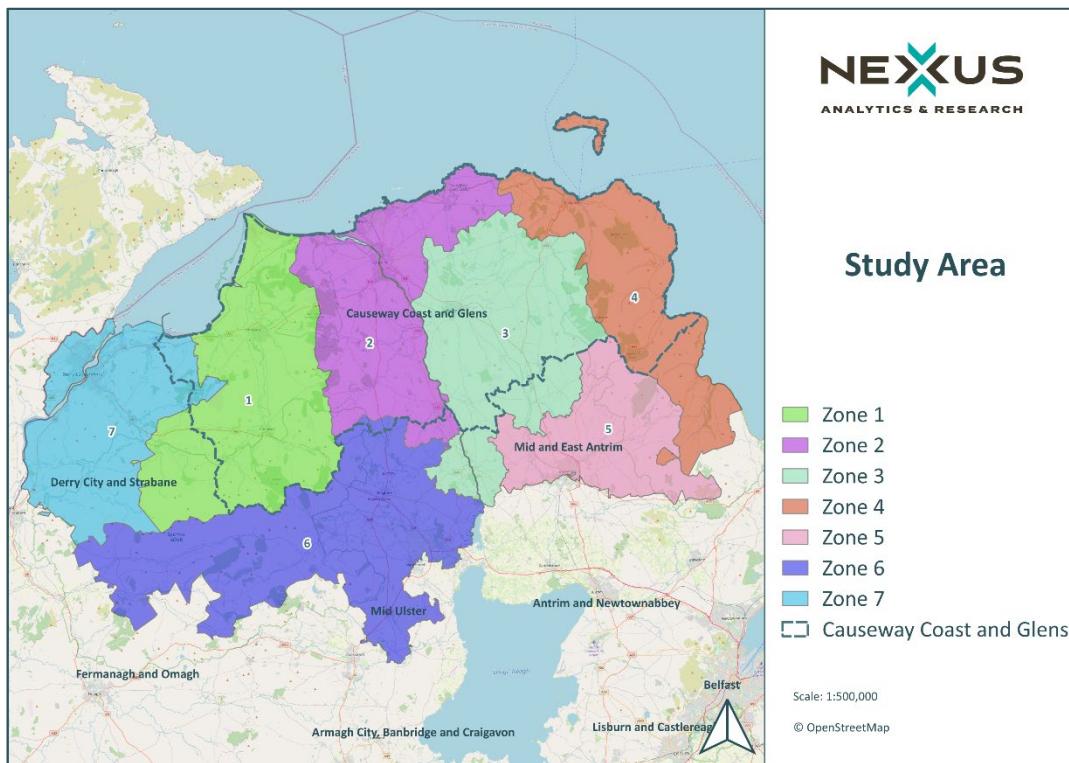
### Introduction

- 4.1 This section acts a direct update to the 2017 and 2020 capacity assessments, both carried out by Nexus. Both of these assessments were based on results from the same household survey carried out in 2017. A new household survey was commissioned for this assessment, which provides an updated position regarding market shares and the capacity for new retail floorspace.
- 4.2 This section first defines the Study Area and describes the household survey undertaken to inform this study. It summarises the key findings on internet shopping patterns and delves into the survey-derived market share analysis for convenience and comparison goods spending at 'bricks and mortar' locations.
- 4.3 We also set out the results of our quantitative capacity assessment for new retail (comparison and convenience goods) floorspace in Causeway Coast and Glens, covering the period from 2025 to 2038. We also consider the future capacity for commercial leisure floorspace over the same timeframe.

### Household Survey & Study Area

- 4.4 Household surveys are recognised across the retail industry, and within planning policy guidance, as an excellent means of understanding where people within a specified area carry out their retail and leisure expenditure. We have therefore commissioned a household survey and utilised the results to inform our quantitative analysis of the turnover of specific retailers, towns and other destinations, as well as its qualitative findings on attitudes and perceptions of different centres.
- 4.5 It is important to identify a Study Area that covers the key area of interest, which can be seen in Figure 4.5.1 and at **Appendix A**. To allow for direct comparisons between the findings of the 2017 and 2020 studies and the findings of this study, we have adopted the same Study Area that were used in these studies. The Study Area is further broken down into seven zones, which are defined on the basis of postal sectors. Zones 1-4 broadly align with the boundary of the local authority.

Figure 4.5.1 Study Area



- 4.6 The table below details the postal geography of each Zone:

Figure 4.6.1 Study Area Postal Sectors

Zone	Postal sectors
1	BT49 0, BT49 9, BT47 4
2	BT51 3, BT51 4, BT51 5, BT52 1, BT52 2, BT55 7, BT56 8, BT57 8
3	BT44 8, BT44 9, BT53 6, BT53 7, BT53 8 100
4	BT44 0, BT54 6 100
5	BT42 1, BT42 4, BT43 5, BT43 6, BT43 7 100
6	BT45 5, BT45 7, BT45 8, BT46 5, BT79 8 100
7	BT47 2, BT47 3, BT47 5, BT47 6, BT48 0, BT48 6, BT48 7, BT48 8, BT48 9, BT82 0

- 4.7 A total of 700 interviews were carried out across the seven zones in June and July of 2025. This is corroborated for its statistical accuracy, relative to population, by NEMS in their report in [Appendix B](#).

- 4.8 A full description of the research methodology, sampling size, weightings and sample profiles is contained at the beginning of the NEMS report. NEMS quote their work as being within a 95% confidence range.

## Study Area Population

- 4.9 The population for each zone in 2025 is sourced from Experian AppLibrary data (2024 report). The application of Experian population projections when forecasting retail and leisure capacity is an industry standard. For Zones 5-7, i.e. those which lie outside of the Causeway Coast and Glens authority area, we have used Experian forecasts to project populations

forward at each interval year until 2038. For Zones 1-4, we have instead applied NISRA's mid-2018 population projections for the district, to the 2025 Experian estimates to project populations forwards.

- 4.10 We present the population projections on a zone-by-zone basis in Figure 4.10.1 below.

Figure 4.10.1 Population Projections

Zone	2025	2028	2031	2034	2038	Growth 2025-2038
Zone 1	35,677	35,616	35,480	35,266	34,911	-2.1%
Zone 2	65,066	64,955	64,708	64,318	63,669	-2.1%
Zone 3	42,301	42,229	42,068	41,814	41,393	-2.1%
Zone 4	16,007	15,979	15,919	15,822	15,663	-2.1%
Zone 5	43,310	43,407	43,405	43,346	43,213	-0.2%
Zone 6	44,663	45,388	46,025	46,612	47,371	6.1%
Zone 7	115,406	114,894	114,145	113,233	111,879	-3.1%
<b>Total Study Area</b>	<b>362,429</b>	<b>362,468</b>	<b>361,751</b>	<b>360,412</b>	<b>358,098</b>	<b>-1.2%</b>

Source: Table 1a, Appendix C

- 4.11 As seen, the population of zones within the district is expected to decrease by 2.1% between 2025 and 2038. The only zone where the population is expected to increase rather than decrease is Zone 6. Overall, the population of the Study Area is forecast to decrease by 1.2% by 2038.

## Non-Store Retailing or Special Forms of Trading

- 4.12 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.

### Convenience Goods Online Shopping

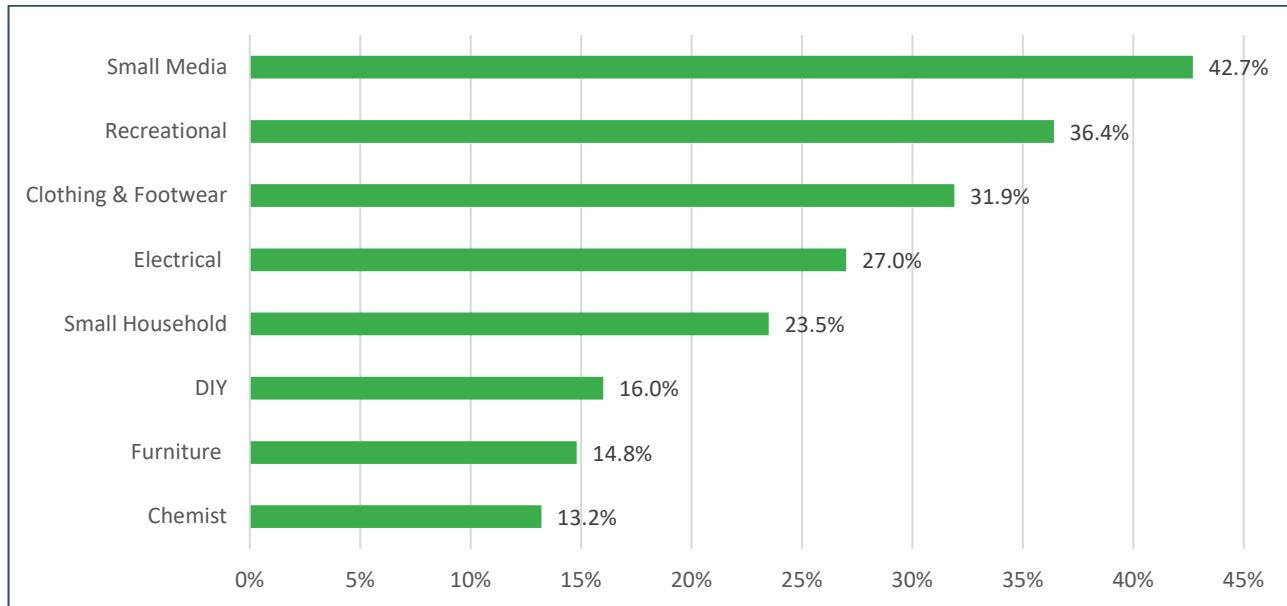
- 4.13 The household survey asked residents of the Study Area where they normally undertake their main food and grocery shopping.

- 4.14 Across the Study Area, 11.4% of respondents usually shop online for their main food shop (Question 1 of the household survey). As set out in Section 2, the UK average for online convenience shopping in 2024 is 17.5%. As such, the take-up of online convenience shopping in the Study Area is lower than the UK average. This is typical of more rural settings nationally, where take-up of online grocery delivery is lower than in urban areas.

### Comparison Goods Online Shopping

- 4.15 The household survey asked where respondents usually shop for different types of comparison goods. The findings are presented in the figure below which shows that the take-up for online shopping varies across the categories, from 13.2% (chemist goods) to 42.7% (small media, which includes books, stationery and recording media). On average, within the Study Area, 30.2% of respondents shop online for comparison goods, which is slightly below the UK average of 32.1%. This would suggest that there is a reasonable level of opportunities for in-person comparison shopping in the area.

Figure 4.15.1 Online Comparison Goods Spending in the Study Area



Source: NEMS Household Survey

## Retail Expenditure Forecasts

- 4.16 Having examined where online spending is focused, we now examine that proportion of spending which is carried out at 'bricks and mortar' stores.
- 4.17 Retail expenditure data has been sourced from our in-house Experian AppLibrary software. 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 in **Appendix C**.
- 4.18 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.
- 4.19 Expenditure data from Experian is provided per capita in 2023 prices, as is every subsequent monetary value. Using the growth rates presented in Figure 7 of Experian Retail Planner Briefing Note 22 (March 2025), which are reproduced in Figure 4.20.1, the per capita expenditure is then projected forward to the base year (2025) and the relevant assessment years. Adjustments are made at every step to account for the growth in special forms of trading (SFT).
- 4.20 There are two elements that should be noted here:
- Experian notes 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 produces annual updates to reflect this, and as we go on to discuss in our recommendations later in the report, we would advise that some of the expenditure data inputs (e.g. growth rates and base per capita spending figures) to this report be revisited on a regular basis.
  - 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. As we have mentioned previously, Experian Retail Planner Briefing Note 22 (March 2025)

provides estimated year-on-year forecasts of internet and other SFT, which allows us to 'strip out' any expenditure that is, either now or in the future, diverted to SFT. This ensures that the increasing propensity to shop by SFT is accounted for in our modelling. 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. Furthermore, many brands offer online sales but source the goods from their own stores' shelves. This is often the case for food stores where employees will pick online orders from stores' shelves before, during or after opening hours. These orders are then delivered by dedicated vans from each store and as such, the online expenditure is attributed to tangible stores. Experian provides 'adjusted' figures to account for this.

Figure 4.20.1 'Adjusted' Special Forms of Trading Market Share Forecasts

Year	Convenience growth rates (%)	Comparison growth rates (%)
2021	-1.8	7.7
2022	-5.1	6.4
2023	-3.3	-2.2
2024	-1.9	-1.7
2025	-0.9	-0.4
2026	-0.7	0.9
2027	-0.6	1.3
2028	-0.4	2.0
2029	-0.4	2.2
2030	-0.4	2.2
2031	-0.4	2.2
2032	-0.3	2.2
2033	-0.3	2.2
2034	-0.3	2.1
2035	-0.3	2.1
2036	-0.3	2.1
2037	-0.3	2.1
2038	-0.3	2.1
2039	-0.3	2.1
2040	-0.3	2.0

Source: Figure 7, Experian Retail Planner Briefing Note 22, March 2025

- 4.21 The expenditure per capita figures are then multiplied by the population of each zone at each of the assessment years. Figure 4.21.1 sets out the resultant outcome of the total 'brick and mortar' comparison and convenience expenditure in the Study Area at the base and assessment years. As seen, growth in comparison expenditure is expected to exceed growth in convenience expenditure considerably, due to the more optimistic growth rates projected at Figure 4.20.1.

Figure 4.21.1 Retail Expenditure Forecasts in the Study Area (£m)

	2025	2028	2031	2034	2038	Growth 2025-2038
Convenience	£1,115.2	£1,096.4	£1,081.0	£1,067.2	£1,047.5	-6.1%
Comparison	£1,174.6	£1,225.0	£1,301.4	£1,374.0	£1,464.4	24.7%

Source: Tables 1b & 8b, Appendix C

- 4.22 Convenience expenditure in the Study Area is forecast to decrease by 6.1% by 2038. This is due to a combination of a declining population, and pessimistic growth rates in convenience spending. Conversely, comparison expenditure is projected to increase by 24.7%. Despite the declining population, the strong growth forecast in per capita comparison spending effectively cancels this out, and results in a positive growth overall in the Study Area.

## Convenience Goods Findings

### Market Shares

- 4.23 Before considering the capacity for new convenience goods floorspace, we firstly examine the overall convenience goods spend by residents across the Study Area, both in overall terms and for those living in Zones 1-4.

Figure 4.23.1 Convenience Goods Market Share by Destination

Destination	Total Study Area Market Share (£m at 2025)	Total Study Area Market Share (%) (2025)	Zones 1-4 Market Share (£m at 2025)	Zones 1-4 Market Share (%)
<b>Zones 1-4</b>	<b>£507.7</b>	<b>45.5%</b>	<b>£446.4</b>	<b>88.2%</b>
<b>Zone 1 - Limavady</b>	<b>£131.4</b>	<b>11.8%</b>	<b>£98.2</b>	<b>19.4%</b>
Limavady Town Centre	£74.7	6.7%	£71.8	14.2%
Limavady – Out of Centre	£14.1	1.3%	£14.1	2.8%
Zone 1- Out of Centre - Other	£42.6	3.8%	£12.3	2.4%
<b>Zone 2 - Coleraine</b>	<b>£243.6</b>	<b>21.8%</b>	<b>£225.1</b>	<b>44.5%</b>
Coleraine Town Centre	£56.2	5.0%	£47.2	9.3%
Portrush Town Centre	£0.3	0.0%	£0.3	0.1%
Portstewart Town Centre	£2.4	0.2%	£2.4	0.5%
Coleraine – Out of Centre	£134.6	12.1%	£126.9	25.1%
Portrush – Out of Centre	£4.2	0.4%	£4.2	0.8%
Portstewart – Out of Centre	£13.3	1.2%	£12.6	2.5%
Zone 2 – Out of Centre - Other	£32.5	2.9%	£31.5	6.2%
<b>Zone 3 - Ballymoney</b>	<b>£108.0</b>	<b>9.7%</b>	<b>£98.6</b>	<b>19.5%</b>
Ballymoney Town Centre	£87.6	7.9%	£79.8	15.8%
Ballymoney - Out of Centre	£11.1	1.0%	£11.1	2.2%
Zone 3 – Out of Centre - Other	£9.3	0.8%	£7.7	1.5%
<b>Zone 4 – The Glens</b>	<b>£24.7</b>	<b>2.2%</b>	<b>£24.4</b>	<b>4.8%</b>
Ballycastle Town Centre	£3.0	0.3%	£3.0	0.6%
Ballycastle – Out of Centre	£9.3	0.8%	£9.3	1.8%
Zone 4 – Out of Centre - Other	£12.4	1.1%	£12.1	2.4%

Destination	Total Study Area Market Share (£m at 2025)	Total Study Area Market Share (%) (2025)	Zones 1-4 Market Share (£m at 2025)	Zones 1-4 Market Share (%)
<b>Zones 5-7</b>	<b>£432.3</b>	<b>38.8%</b>	<b>£30.5</b>	<b>6.0%</b>
Zone 5 – Ballymena	£282.1	25.3%	£23.3	4.6%
Zone 6 – Maghera	£46.1	4.1%	£0.9	0.2%
Zone 7 – Derry-Londonderry	£104.2	9.3%	£6.3	1.2%
<b>Outside Study Area</b>	<b>£175.3</b>	<b>15.7%</b>	<b>£29.3</b>	<b>5.8%</b>
Cookstown	£11.6	1.0%	£0.0	0.0%
Larne	£10.4	0.9%	£10.4	2.1%
Strabane	£0.5	0.0%	£0.0	0.0%
Outside Study Area - Other	£152.6	13.7%	£18.9	3.7%
<b>Total</b>	<b>£1,115.2</b>	<b>100.0%</b>	<b>£506.2</b>	<b>100.0%</b>

Source: Tables 2b, 3b, 4a and 4b, Appendix C

- 4.24 Of the convenience expenditure available in the wider Study Area, 45.5% is spent within Zones 1-4, and the remaining 54.5% is spent in Zones 5-7 and outside of the Study Area. When looking specifically to market shares of residents within Zones 1-4, however, retention rates within the authority area is far higher, at 88.2%. This is slightly lower than in the 2017 study, which reported a retention rate of 90.4%. Based on our knowledge of similar studies across the UK and Ireland, we consider this retention rate to be higher than average, which suggests that the Borough currently caters well for the needs of its residents.
- 4.25 Of £507.7m spend within Zones 1-4, almost half is spent within the defined town centres. Ballymoney, Coleraine and Limavady town centres all attract significant levels of expenditure, whereas Ballycastle, Portrush and Portstewart attract only small amounts of expenditure, likely due to the relative lack of large retailers in these centres.
- 4.26 Out of centre destinations also attract large amounts of expenditure, particularly the Riverside Retail Park in Coleraine.
- 4.27 The table below sets out the highest performing individual stores in the local authority area. Of these five, three are located within town centres.

Figure 4.27.1 Highest performing convenience stores in the local authority area

Store	Market Share (%)	Expenditure (£m)
Tesco Superstore, Ballymoney	4.8%	£52.8
Tesco Superstore, Coleraine	4.5%	£50.1
Tesco Superstore, Limavady	3.9%	£43.5
Asda, Coleraine	3.7%	£41.7
Sainsbury's Superstore, Riverside Retail Park	3.3%	£36.6

Source: Tables 4a and 4b, Appendix C

## Benchmarking

- 4.28 Turning to individual retail destinations, where national company averages are available for benchmarking purposes, we are able to compare local turnover to the turnover of an average store of that size in order to identify where facilities may be trading over or below expectations. This is summarised at Figure 4.28.1.

Figure 4.28.1 Convenience Benchmarking

Destination	Benchmark Turnover (£m)	Survey Turnover (With Inflow from Beyond Study Area)	Trading Position against Benchmark (£m)	Trading Position against Benchmark (%)
<b>Zones 1-4</b>	<b>£437.7</b>	<b>£507.7</b>	<b>£92.3</b>	<b>21.1%</b>
<b>Zone 1 – Limavady</b>	<b>£104.4</b>	<b>£131.4</b>	<b>£26.9</b>	<b>25.8%</b>
<b>Limavady Town Centre</b>	<b>£47.7</b>	<b>£74.7</b>	<b>£26.9</b>	<b>56.4%</b>
<i>Lidl, Main Street, Limavady</i>	£6.1	£16.7	£10.5	171.7%
<i>Supervalu, Market Street, Limavady</i>	£7.7	£7.7	£0.0	0.0%
<i>Tesco Superstore, Main Street, Limavady</i>	£27.1	£43.5	£16.4	60.6%
<i>Limavady Town Centre – Other</i>	£6.8	£6.8	£0.0	0.0%
<b>Limavady - Out of Centre</b>	<b>£14.1</b>	<b>£14.1</b>	<b>£0.0</b>	<b>0.0%</b>
<b>Zone 1 - Out of Centre – Other</b>	<b>£42.6</b>	<b>£42.6</b>	<b>£0.0</b>	<b>0.0%</b>
<b>Zone 2 – Coleraine</b>	<b>£218.6</b>	<b>£243.6</b>	<b>£46.1</b>	<b>21.1%</b>
<b>Coleraine Town Centre</b>	<b>£42.7</b>	<b>£61.9</b>	<b>£19.2</b>	<b>45.0%</b>
<i>Iceland, Railway Road, Coleraine</i>	£3.0	£3.7	£0.7	25.1%
<i>Tesco Superstore, Bannfield Road, Coleraine</i>	£36.7	£55.2	£18.5	50.3%
<i>Coleraine Town Centre - Other</i>	£3.0	£3.0	£0.0	0.0%
<b>Portrush Town Centre</b>	<b>£0.3</b>	<b>£0.3</b>	<b>£0.0</b>	<b>0.0%</b>
<b>Portstewart Town Centre</b>	<b>£2.7</b>	<b>£2.7</b>	<b>£0.0</b>	<b>0.0%</b>
<b>Coleraine - Out of Centre</b>	<b>£120.1</b>	<b>£148.1</b>	<b>£28.0</b>	<b>23.3%</b>
<i>Asda, Ring Road, Coleraine</i>	£38.9	£45.9	£7.0	18.0%
<i>Centra Store (Moran's), Dunhill Road</i>	£5.3	£5.3	£0.0	0.0%
<i>Lidl, Riverside Retail Park</i>	£12.7	£27.1	£14.4	113.3%
<i>Marks &amp; Spencer (M&amp;S Foodhall), Riverside Retail Park</i>	£17.2	£16.8	-£0.4	-2.1%
<i>Sainsbury's Superstore, Riverside Retail Park</i>	£33.3	£40.2	£6.9	20.8%
<i>Coleraine - Out of Centre - Other</i>	£12.7	£12.7	£0.0	0.0%
<b>Portrush - Out of Centre</b>	<b>£4.6</b>	<b>£4.6</b>	<b>£0.0</b>	<b>0.0%</b>

Destination	Benchmark Turnover (£m)	Survey Turnover (With Inflow from Beyond Study Area)	Trading Position against Benchmark (£m)	Trading Position against Benchmark (%)
<b>Portstewart - Out of Centre</b>	<b>£15.7</b>	<b>£14.6</b>	<b>-£1.1</b>	<b>-6.8%</b>
<i>Tesco Superstore, Coleraine Road, Portstewart</i>	£13.8	£12.7	-£1.1	-7.7%
<i>Portstewart - Out of Centre - Other</i>	£1.9	£1.9	£0.0	0.0%
<b>Zone 2 - Out of Centre - Other</b>	<b>£32.5</b>	<b>£32.5</b>	<b>£0.0</b>	<b>0.0%</b>
<b>Zone 3 - Ballymoney</b>	<b>£88.7</b>	<b>£108.0</b>	<b>£19.3</b>	<b>21.7%</b>
<b>Ballymoney Town Centre</b>	<b>£68.3</b>	<b>£87.6</b>	<b>£19.3</b>	<b>28.2%</b>
<i>Lidl, Meeting House Street, Ballymoney</i>	£10.4	£13.8	£3.4	32.9%
<i>Tesco Superstore, Castle Street, Ballymoney</i>	£37.4	£53.3	£15.8	42.3%
<i>Ballymoney Town Centre - Other</i>	£20.5	£20.5	£0.0	0.0%
<b>Ballymoney - Out of Centre</b>	<b>£11.1</b>	<b>£11.1</b>	<b>£0.0</b>	<b>0.0%</b>
<b>Zone 3 - Out of Centre - Other</b>	<b>£9.3</b>	<b>£9.3</b>	<b>£0.0</b>	<b>0.0%</b>
<b>Zone 4 - The Glens</b>	<b>£26.0</b>	<b>£26.0</b>	<b>£0.0</b>	<b>0.0%</b>
<b>Ballycastle Town Centre</b>	<b>£3.4</b>	<b>£3.4</b>	<b>£0.0</b>	<b>0.0%</b>
<b>Ballycastle - Out of Centre</b>	<b>£10.2</b>	<b>£10.2</b>	<b>£0.0</b>	<b>0.0%</b>
<b>Zone 4 - Out of Centre - Other</b>	<b>£12.4</b>	<b>£12.4</b>	<b>£0.0</b>	<b>0.0%</b>

Source: Table 5, Appendix C

- 4.29 Our findings indicate that convenience floorspace in Causeway Coast and Glens Borough is performing well, at 21.1% above benchmark expectations. The best performing town centre is Limavady, in large part to the strong performance of the Tesco Superstore and Lidl, the latter of which is the best performing store in the Borough.

## Convenience Goods Capacity

- 4.30 One of the key aims of this Study is to provide recommendations on the capacity for new retail floorspace over the plan period to 2038. 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. As discussed in Section 2, one such example has been the economic implications of the United Kingdom leaving the European Union, the Covid-19 pandemic, and the war in Ukraine, all of which has culminated in high inflation.
- 4.31 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), and 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.

- 4.32 Detailed quantitative retail capacity tables are enclosed at **Appendix C**.
- 4.33 Retail capacity modelling follows a consistent, robust methodology which incorporates a number of datasets and informed assumptions which we describe further below, but broadly speaking:
- $$\text{Available Expenditure (£m)} - \text{Turnover of existing & proposed (£m)} = \text{Surplus or Deficit (£m)}$$
- 4.34 Experian AppLibrary data 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.
- 4.35 The turnover of existing retailers across the Study Area is calculated based on average sales densities, or turnover, per square metre. Various retail planning sources provide average (or benchmark) sales densities for all national multiple retailers.
- 4.36 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.
- 4.37 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 Food Warehouse and Lidl amongst others) continue to operate at a lower sales density than the traditional 'big 4' (Sainsbury's, Tesco, Asda, and Morrisons). 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.
- 4.38 Turning now to our detailed findings, as shown in Figure 4.23.1, the household survey results show that facilities within Causeway Coast and Glens have a 45.5% convenience goods market share of all spending carried out by residents of the Study Area.
- 4.39 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 within the Borough continue to draw 45.5% of all convenience goods spending from the Study Area). We consider maintaining a constant market share a sensible basis for analysis given the relative lack of planned developments across the Study Area. In coming to this view, we have analysed the level of commitments identified through correspondence with Council officers.
- 4.40 Based on a constant market share, we then allow for growth in retail expenditure over the period to 2038, as well as utilising data provided within the latest Experian Retail Planner Briefing Note 22, 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 and disruptions to logistics continue to subdue projected efficiencies in turnover of existing convenience retail floorspace.
- 4.41 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 6 of Appendix C 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 publicly 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.
- Finally, we consider whether foodstores are likely to attract any additional 'inflow' from outside of the Study Area. In this instance, we have made a small allowance for inflow from visitors. This has been applied to the towns of Portrush, Portstewart, Ballycastle and Coleraine, due to the number of second homes and caravans which may attract expenditure from tourists.

**4.42** We then go on to calculate the anticipated turnover of all major convenience goods operators based on the published company sales data, 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 destination's market share) to the benchmark turnovers, we are able to establish where stores are trading above (overtrading) or below (under-trading) company averages.

**4.43** Based on the household survey, and accounting for inflow, we identify in **Appendix C** that convenience retailers in Causeway Coast and Glens attract an estimated £521.0m of convenience expenditure at 2025 (Table 6b). Table 6c then sets out the benchmark turnover of existing facilities in the Borough (£437.7m at 2025). There exists, therefore, a level of convenience goods 'over-trading' in the Borough.

**4.44** We then go on to consider committed and extant permissions for new convenience retail floorspace. This includes any developments that have not been built, are currently under construction, or have opened or would not have been operating at the time of the 2025 household survey. We do not take into account proposed allocations for retail floorspace but consider development proposals for which a formal planning application has either been submitted or approved. Only one relevant application has been identified, which is set out at Table 6d of Appendix C. This commitment has a new convenience floorspace of 229 sqm and an estimated turnover of £1.8m at 2025, based on average sales densities (Table 6d).

**4.45** In the table below, we identify that there is initially a significant surplus of £83.3m convenience expenditure in Causeway Coast and Glens. However, this surplus is expected to narrow over the Local Development Plan period, to £63.1m by 2038. This is due to a combination of declining population projections and negative forecasts for per capita convenience spending.

Figure 4.45.1 Gross Convenience Goods Surplus Expenditure in Causeway Coast and Glens

Year	Benchmark Turnover (£m)	Survey Turnover (including inflow) (£m)	(Gross) Available Expenditure Before Commitments (£m)	Turnover of All Committed Floorspace (£m)	(Net) Surplus Expenditure (£m)
2028	£437.7	£521.0	£83.3	£1.8	£81.5
2031	£437.7	£513.7	£76.0	£1.8	£74.2
2034	£436.4	£507.2	£70.8	£1.8	£69.0
2038	£434.7	£497.8	£63.1	£1.8	£61.3

Source: Table 7a, Appendix C

- 4.46 Using average sales densities to calculate a minimum floorspace scenario (a large supermarket operator) and a maximum floorspace scenario (a combination of discount foodstore operators), we then translate this surplus expenditure to the net additional convenience goods capacity for Causeway Coast and Glens in the table below.

Figure 4.46.1 Net quantitative 'capacity' for new convenience goods facilities in Causeway Coast and Glens

Year	Surplus Expenditure (£m)	Minimum Floorspace Capacity (sqm net)	Maximum Floorspace Capacity (sqm net)
2028	£81.5	6,000	7,700
2031	£74.2	5,500	7,100
2034	£69.0	5,100	6,600
2038	£61.3	4,600	5,900

Source: Table 7a, Appendix C

- 4.47 We project that there will initially be a large capacity of between 6,000 sqm and 7,700 sqm. Over the Local Development Plan period, this is expected to shrink to between 4,600 sqm and 5,900 sqm by 2038.
- 4.48 This overall capacity figure is not expected to be distributed evenly across the Borough, and therefore we have carried out an exercise to understand the capacity for additional floorspace within the Borough's main towns. This exercise follows the same steps as above, with adjustments to reflect different market shares for each town.
- 4.49 The full results are presented in Appendix C, however we produce a summary below of the capacity forecast at the end of the Local Development Plan period in 2038.

Figure 4.49.1 Net quantitative 'capacity' for new convenience goods facilities by town, 2038

Town	Surplus Expenditure (£m)	Minimum Floorspace Capacity (sqm net)	Maximum Floorspace Capacity (sqm net)
Coleraine	£35.6	2,700	3,400
Limavady	£20.1	1,500	1,900
Portrush	-£0.3	0	0
Portstewart	-£2.0	-100	-200
Ballycastle	-£0.7	-100	-100
Ballymoney	£13.8	1,000	1,300
Rest of Causeway Coast and Glens	-£5.2	-400	-500
<b>Total (Causeway Coast and Glens)</b>	<b>£61.3</b>	<b>4,600</b>	<b>5,900</b>

Source: Appendix C

- 4.50 As seen, although capacity for the Borough as a whole is positive, in some towns (Portstewart and Ballycastle) there is a net negative forecast for additional convenience floorspace. The towns projected to support the most floorspace are Coleraine, Limavady and Ballymoney.
- 4.51 The implications of these results will be examined in greater detail in Section 5.

## Comparison Goods Findings

### Market Shares

- 4.52 Turning to consider comparison goods, we examine market shares across the range of categories defined by Experian. These eight categories cover all ranges of bulky and non-bulky items. The full results of our market shares analysis are set out in Tables 8-18 of **Appendix C**.
- 4.53 Figure 4.53.1 details the market share of various destinations in terms of overall comparison goods.

Figure 4.53.1 Comparison Goods Market Share by Destination

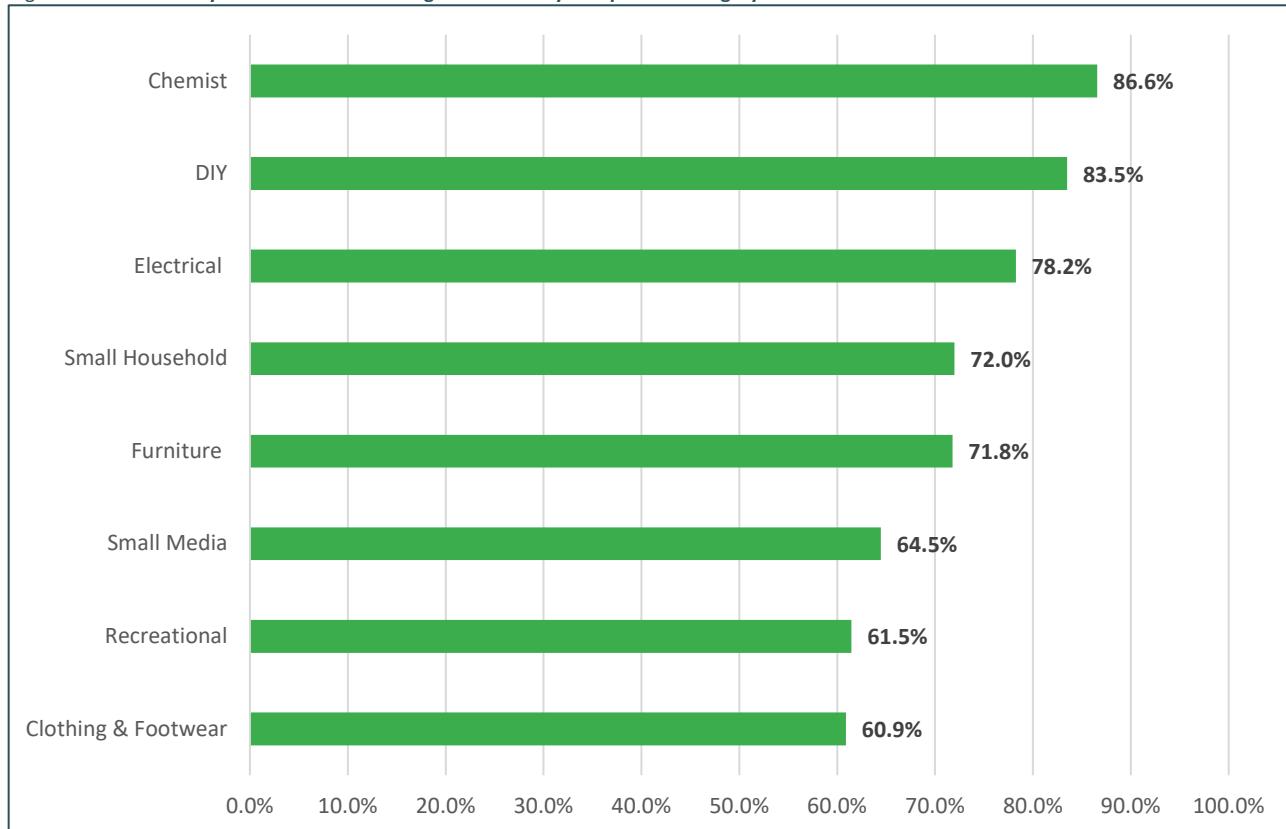
Destination	Total Study Area Market Share (£m at 2025)	Total Study Area Market Share (%)	Zones 1-4 Market Share (£m at 2025)	Zones 1-4 Market Share (%)
<b>Zones 1-4</b>	<b>£421.4</b>	<b>35.9%</b>	<b>£367.9</b>	<b>69.3%</b>
Zone 1 – Limavady	£68.0	5.8%	£50.6	9.5%
Limavady	£65.6	5.6%	£48.3	9.1%
Zone 1 - Other	£2.4	0.2%	£2.3	0.4%
<b>Zone 2 - Coleraine</b>	<b>£272.9</b>	<b>23.2%</b>	<b>£245.9</b>	<b>46.3%</b>
Coleraine	£244.0	20.8%	£223.2	42.1%
Portrush	£5.7	0.5%	£5.4	1.0%
Portstewart	£10.4	0.9%	£8.6	1.6%
Zone 2 - Other	£12.7	1.1%	£8.8	1.7%
<b>Zone 3 - Ballymoney</b>	<b>£72.3</b>	<b>6.2%</b>	<b>£64.0</b>	<b>12.1%</b>
Ballymoney	£68.8	5.9%	£62.8	11.8%
Zone 3 - Other	£3.4	0.3%	£1.2	0.2%
<b>Zone 4 - The Glens</b>	<b>£8.2</b>	<b>0.7%</b>	<b>£7.3</b>	<b>1.4%</b>
Ballycastle	£6.5	0.6%	£5.6	1.1%
Zone 4 - Other	£1.7	0.1%	£1.7	0.3%
<b>Zones 5-7</b>	<b>£517.7</b>	<b>44.1%</b>	<b>£88.1</b>	<b>16.6%</b>
<b>Zone 5 - Ballymena</b>	<b>£124.0</b>	<b>10.6%</b>	<b>£44.9</b>	<b>8.5%</b>
<b>Zone 6 - Maghera</b>	<b>£68.3</b>	<b>5.8%</b>	<b>£5.7</b>	<b>1.1%</b>
<b>Zone 7 – Derry - Londonderry</b>	<b>£325.4</b>	<b>27.7%</b>	<b>£37.4</b>	<b>7.1%</b>
<b>Outside Study Area</b>	<b>£235.5</b>	<b>20.1%</b>	<b>£74.6</b>	<b>14.1%</b>
Antrim	£25.8	2.2%	£8.9	1.7%
Belfast	£40.2	3.4%	£25.4	4.8%
Cookstown	£19.1	1.6%	£0.5	0.1%

Destination	Total Study Area Market Share (£m at 2025)	Total Study Area Market Share (%)	Zones 1-4 Market Share (£m at 2025)	Zones 1-4 Market Share (%)
Larne	£10.9	0.9%	£8.5	1.6%
Omagh	£3.8	0.3%	£0.0	0.0%
Strabane	£23.1	2.0%	£0.5	0.1%
Outside Study Area - Other	£112.4	9.6%	£30.8	5.8%
<b>TOTAL</b>	<b>£1,174.6</b>	<b>100.0%</b>	<b>£530.6</b>	<b>100.0%</b>

Source: Tables 17a and 17b, Appendix C

- 4.54 The results show that stores in Zones 1-4 attract 35.9% (£421.4m) of the comparison expenditure available in the Study Area. As with convenience, the centres of Ballymoney, Coleraine and Limavady which attract the most expenditure whereas Ballycastle, Portrush and Portstewart attract much lower levels of expenditure.
- 4.55 Looking specifically to residents of Zones 1-4, 69.3% of expenditure is retained within the Borough. 16.6% of expenditure is directed towards Zones 5-7, and the other 14.1% of expenditure is spent outside of the Study Area.
- 4.56 There is, however, some variation between different comparison categories. Figure 4.56.1 outlines the leakage outside of the Borough by residents of Zones 1-4 across different comparison categories. Retention varies across categories, ranging from between 60.9% (clothing and footwear) and 86.6% (chemist goods).

Figure 4.56.1 Causeway Coast and Glens Borough Retention by Comparison Category



Source: NEMS Household Survey

## Comparison Goods Capacity

- 4.57 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).
- 4.58 As such, we adopt a standard approach that comparison goods retailers across the Study Area are trading 'at equilibrium' at 2025, meaning that we adopt the survey derived turnover of each facility, and examine capacity by measuring the growth in available expenditure to 2038. For the purposes of our assessment, we have assumed that Causeway Coast and Glens Borough's attraction to Study Area residents will remain constant at 35.9% of all spending proportionate to population growth (Table 18a). Based on the limited scale of planned developments inside and nearby the Borough, we consider this a robust basis for analysis.
- 4.59 We adjust the turnover figures to allow for an inflow from outside of the Study Area. As with convenience, we assume inflow from tourists is likely directed towards visitor destinations such as Portrush, Portstewart, Ballycastle and Coleraine.
- 4.60 We take account of committed and extant planning permissions for new comparison retail floorspace across the Borough that are likely to come forward over the Local Development Plan period, again informed by our discussions with Council officers. This includes any developments that are currently under construction or would not have been operating at the time of the 2025 household survey. Only one commitment of relevance has been identified, which has a net increase of 240 sqm, and an estimated turnover of £1.2m at 2025.
- 4.61 Figure 4.61.1 sets out below the resultant gross comparison goods capacity forecasts over time. At 2029, we project a negative surplus expenditure of £10.1m. By 2038, this is expected to widen to -£39.9m. This is attributed to a projected increase in the sales efficiency of existing comparison floorspace.

Figure 4.61.1 Gross Comparison Goods Surplus Expenditure in Causeway Coast and Glens

Year	Benchmark Turnover (£m)	Survey Turnover (including inflow) (£m)	(Gross) Available Expenditure Before Commitments (£m)	Turnover of All Committed Floorspace (£m)	(Net) Surplus Expenditure (£m)
2028	£463.4	£454.5	-£8.9	£1.2	-£10.1
2031	£496.1	£482.9	-£13.2	£1.3	-£14.5
2034	£531.2	£509.8	-£21.3	£1.4	-£22.7
2038	£581.7	£543.4	-£38.3	£1.5	-£39.9

Source: Table 19a, Appendix C

- 4.62 Building on this assessment, we then look at floorspace capacity projections using minimum and maximum averages sales densities, which at 2025 we consider to be £5,500 per sqm and £3,500 per sqm, respectively. These densities are then grown using the sales densities growth rates set out in the Experian Retail Planner Briefing Note 22. The results of this exercise are set out in Figure 4.62.1.

Figure 4.62.1 Net quantitative 'capacity' for new comparison goods facilities in Causeway Coast and Glens

Year	Surplus Expenditure (£m)	Minimum Floorspace Capacity (sqm net)	Maximum Floorspace Capacity (sqm net)
2028	-£10.1	-1,700	-2,700
2031	-£14.5	-2,300	-3,600
2034	-£22.7	-3,400	-5,300
2038	-£39.9	-5,400	-8,500

Source: Table 19a, Appendix C

- 4.63 Initially, there is negative capacity of between 1,700 sqm and 2,700 sqm. In line with expenditure, this is forecast to widen to a negative capacity of between 5,400 sqm and 8,500 sqm.
- 4.64 Again, we disaggregate these results to understand the capacity for comparison floorspace within each of the Borough's main towns. The summary of this is presented below:

Figure 4.64.1 Net quantitative 'capacity' for new comparison goods facilities by town, 2038

Town	Surplus Expenditure (£m)	Minimum Floorspace Capacity (sqm net)	Maximum Floorspace Capacity (sqm net)
Coleraine	-£22.5	-3,100	-4,800
Limavady	-£7.3	-1,000	-1,600
Portrush	-£0.6	-100	-100
Portstewart	-£1.0	-100	-200
Ballycastle	-£0.6	-100	-100
Ballymoney	-£6.1	-800	-1,300
Rest of Causeway Coast and Glens	-£1.8	-200	-400
<b>Causeway Coast and Glens</b>	<b>-£39.9</b>	<b>-5,400</b>	<b>-8,500</b>

Source: Appendix C

- 4.65 Negative capacity is forecast across all geographies, but particularly in Coleraine, Limavady and Ballymoney. The implications of this are discussed in further detail in Section 5.

## Leisure Capacity

- 4.66 The results of the NEMS Household Telephone Survey offer an indication of locations/facilities where residents of the Study Area satisfy their leisure (namely Indoor Health & Fitness, Cinemas, Restaurants, Pubs/Bars/Nightclubs, Ten-pin Bowling, Swimming, Cultural Facilities and Outdoor Activities). As such, the survey enables us to analyse patterns of travel and potential deficiencies (those that are qualitative in nature) within the Study Area.
- 4.67 The modelling of future commercial leisure needs cannot necessarily be based upon the same quantitative model used to estimate retail need. This is because leisure spending is not undertaken regularly and is often influenced by cultural shifts and technological advances.
- 4.68 Nevertheless, we appraise the existing provision of leisure facilities across the Study Area and compare this against recognised sector 'standards' or 'benchmarks'. The completion of this 'benchmarking exercise' allows us to establish deficits and where gaps in the provision of existing facilities may be.

## Market Shares

- 4.69 The NEMS household survey asked respondents to describe their leisure and cultural activities and habits. The responses to these questions inform our understanding of leisure trends and needs. The breakdown of the answers to these questions is set out in full at Appendix B and we extrapolate the key results here.
- 4.70 In the first instance, it is important to have an understanding of the participation rates and general popularity of leisure activities across the Study Area. In Question 38 of the household survey, NEMS asked respondents to identify all of the leisure activities in which they participated (respondents were allowed to identify as many options as they wished). We summarise the results in the figure below.

Figure 4.70.1 Participation in leisure activities (%)

Leisure Activity	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
Indoor sports or health and fitness activity	21.4%	27.8%	13.0%	14.1%	12.1%	18.5%	27.0%	<b>21.5%</b>
Cinema	30.8%	35.6%	25.9%	28.1%	24.4%	28.5%	27.2%	<b>28.7%</b>
Restaurant	58.1%	66.2%	55.5%	44.3%	48.7%	49.0%	54.0%	<b>55.1%</b>
Pub / bars	30.5%	28.1%	15.5%	22.6%	16.8%	10.1%	33.0%	<b>24.7%</b>
Nightclub	10.2%	2.1%	0.0%	0.0%	1.4%	0.0%	2.3%	<b>2.3%</b>
Social club	3.6%	2.4%	3.8%	1.3%	4.6%	1.0%	3.9%	<b>3.2%</b>
Ten pin bowling	8.4%	19.1%	11.8%	2.7%	4.5%	13.9%	13.6%	<b>12.3%</b>
Swimming	10.0%	19.9%	16.4%	15.8%	20.1%	19.6%	16.1%	<b>17.1%</b>
Theatre / concert hall	18.1%	25.2%	21.2%	17.3%	17.8%	18.1%	26.9%	<b>22.5%</b>
Museum / art galleries	11.1%	20.6%	17.4%	10.6%	10.7%	12.7%	13.4%	<b>14.4%</b>
Outdoor activities (such as jogging / running / cycling / 11-a-side football etc.)	23.5%	18.3%	19.0%	15.4%	14.3%	18.0%	28.0%	<b>21.4%</b>

Source: Appendix B, Question 38 of NEMS Household Survey

- 4.71 As evident in the figure above, participation rates vary across different activities and across different zones. The most popular leisure activity is visiting restaurants, at 55.1%, whereas the least popular activity is nightclubs, at only 2.3%.
- 4.72 Generally speaking, participation rates in leisure activities were low across all leisure categories, based on our knowledge of similar studies across the UK and Ireland. Relative to averages, participation is particularly low in the categories of cinemas and cultural activities such as theatres, concerts, museums and galleries.
- 4.73 NEMS also asked a series of questions to understand where residents usually undertake their chosen leisure activity. We examine the most popular destinations for residents of the Study Area in Figure 4.73.1.

Figure 4.73.1 Most Popular Destinations for Leisure Activities

Leisure Activity	Most Popular	Second Most Popular	Third Most Popular
Indoor sports or health and fitness activity	Coleraine Leisure Centre (10.3%)	Derry-Londonderry City Centre (9.5%)	Foyle Arena, Derry-Londonderry (9.3%)
Cinema	Movie House, Coleraine (39.0%)	Brunswick Movie Bowl (17.2%)	IMC Cinema, Ballymena (15.6%)
Restaurant	Derry-Londonderry City Centre (17.6%)	Coleraine Town Centre (10.3%)	Portrush Town Centre (9.7%)

Leisure Activity	Most Popular	Second Most Popular	Third Most Popular
Pub / bar / nightclub / social club	Derry-Londonderry City Centre (29.6%)	Portrush Town Centre (10.4%)	Limavady Town Centre (9.0%)
Ten pin bowling	The Jet Centre, Coleraine (63.7%)	Brunswick Moviebowl, Derry-Londonderry (32.3%)	Hollywood Bowl, Belfast (2.5%)
Swimming	Coleraine Leisure Centre (20.6%)	Seven Towers Leisure Centre, Ballymena (17.0%)	Foyle Arena, Derry-Londonderry (13.2%)
Theatre / concert hall / museum/ art gallery	Belfast City Centre (53.1%)	Derry-Londonderry City Centre (20.0%)	Coleraine Town Centre (9.3%)
Outdoor activities	Derry-Londonderry City Centre (17.1%)	Waterside Local Centre, Derry-Londonderry (6.2%)	Portstewart Town Centre (4.3%)

Source: NEMS Household Survey

- 4.74 The results suggest that the most popular destination for leisure activities in the Study Area is Derry-Londonderry, albeit Coleraine is also a popular destination.

#### Zones 1-4

- 4.75 The table below again looks at the most popular destinations for each leisure activity, with a focus on residents of Zones 1-4 only.

Figure 4.75.1 Most Popular Destinations for Leisure Activities (Inner Study Area)

Leisure Activity	Most Popular	Second Most Popular	Third Most Popular
Indoor sports or health and fitness activity	Coleraine Leisure Centre (23.6%)	Joey Dunlop Leisure Centre, Ballymoney (16.0%)	Roe Valley Leisure Centre, Limavady (12.9%)
Cinema	Movie House, Coleraine (76.8%)	IMC Cinema, Ballymena (12.6%)	Movie House Cinema, Maghera (4.4%)
Restaurant	Coleraine Town Centre (19.7%)	Portrush Town Centre (15.9%)	Ballymena Town Centre (5.9%)
Pub / bar / nightclub / social club	Portrush Town Centre (22.6%)	Limavady Town Centre (20.6%)	Derry-Londonderry City Centre (7.0%)
Ten pin bowling	The Jet Centre, Coleraine (88.1%)	Brunswick Moviebowl, Derry-Londonderry (7.0%)	Hollywood Bowl, Belfast (4.9%)
Swimming	Coleraine Leisure Centre (44.3%)	Joey Dunlop Leisure Centre (24.9%)	Roe Valley Leisure Centre, Limavady (5.9%)
Theatre / concert hall / museum/ art gallery	Belfast City Centre (54.1%)	Coleraine Town Centre (16.7%)	Derry-Londonderry City Centre (4.6%)
Outdoor activities	Portstewart Town Centre (11.3%)	Limavady Town Centre (10.1%)	Portrush Town Centre (8.1%)

Source: NEMS Household Survey

- 4.76 As seen, there is considerably less leakage outside of the Borough for residents of Zones 1-4, with Coleraine, Portrush and Limavady all popular destinations. Leakage appears to be highest under the cultural activities category, with a high proportion of residents visiting Belfast for this reason.

#### Need for Additional Leisure Facilities

- 4.77 Question 56 of the household survey asked respondents what leisure facilities they would like to see more of in the area.
- 4.78 The most commonly requested leisure facilities were more facilities and activities for children (12.0%), restaurants (8.8%), pubs (8.1%) and leisure centres (8.1%). 43.0% of respondents also answered that there were no leisure activities they would like to see more of, which suggests a level of satisfaction with existing provision.

## Capacity for Additional Leisure Facilities

4.79 Having identified market shares for a variety of leisure uses, we are able to undertake a 'benchmarking' exercise by referencing the estimated increases in the Study Area's population. The results of the 'benchmarking' exercise have been used to inform our conclusions with regards to the prospective future need for additional commercial leisure facilities.

### Health and Fitness Capacity

4.80 The Leisure Database Company<sup>27</sup> outlines that 15.9% of the UK's population are registered members at private health and fitness clubs, meaning that 1 in every 7 people is a member of a gym. In 2024, there were in the region of 7,009 health and fitness clubs operating across the UK (down from 7,239 in 2019).

4.81 In 2022, Statista reported that the average size of mainstream gym, health-club and leisure centre membership in the UK was approximately 2,846 members per club. Building on this, our household survey results showed that approximately 21.5% of residents in the Study Area participate in health and fitness activities (Q38). Of those, the survey results suggest that 42.1% of residents currently carry out their health and fitness activities within Causeway Coast and Glens itself (Q38). We term this the 'Borough retention rate' and use it as a benchmark (assumed to be constant) to underpin our assessment of the number of additional facilities that can be supported in the Borough over time.

4.82 Based on the current participation rates, attraction rates, and average club size membership identified above, we calculate that residents of the Study Area would support just over eleven large indoor health and fitness centres over the Plan period. Demand is projected to decline slightly in line with a decreasing population.

Figure 4.82.1 Health & Fitness Centre Capacity

Year	Study Area Population	Regular participants @ 21.5%	Borough Retention Rate @ 42.1%	Average membership	No. of facilities supported
2025	362,429	77,922	32,789	2,846	11.5
2028	362,468	77,931	32,792	2,846	11.5
2031	361,751	77,777	32,728	2,846	11.5
2034	360,412	77,489	32,606	2,846	11.5
2038	358,098	76,991	32,397	2,846	11.4

Source: Nexus analysis

4.83 Comparing capacity to supply, the results to Question 39 of the household identify approximately 10 recognised indoor health and fitness centres within the Borough, which would suggest that there is a minor shortfall in existing provision. However, given that there is a high retention rate for residents of Zones 1-4, it would appear that existing facilities cater well for the current population.

### Cinema Capacity

4.84 Causeway Coast and Glens benefits from two cinemas, Movie House in Coleraine which is an 8-screen cinema playing mainstream releases, and Portrush Film Theatre, an independent cinema with only one screen, and limited screenings.

4.85 In 2024, the UK Cinema Association identified that total UK cinema admissions were 126.5 million<sup>28</sup>, equating to just over 1.8 trips per person. This is a significant decrease from 2019, pre-Covid, when admission numbers were at 176 million. In

<sup>27</sup> State of the UK Fitness Industry 2024, Leisure Database Company, 2024

<sup>28</sup> Facts and Figures, UK Cinema Association, 2025

2024, they also identified 823 cinema facilities with 4,587 screens in the UK. Based on this data, the UK yearly average was 27,578 cinema trips per screen.

- 4.86 As shown in the figure below, we have carried out an exercise to calculate how many cinema screens Study Area residents could theoretically support. In order to gauge the number of cinema screens that can be supported in the Study Area over the Plan period, we have calculated the anticipated cinema attendance (based on the national average of 1.8 trips per person) and by assuming that the Borough continues to attract 39.3% of cinema visitors. This identifies a capacity for just over nine cinema screens by 2038. There are currently 9 cinema screens in the Borough which suggests that this is adequate provision for the capacity projected.

Figure 4.86.1 Cinema Capacity

Year	Study Area Population	Estimated cinema attendance based on national attendance average of 1.8	Assumed retention rate of 39.3%	Trips per screen	Cinema screens supported
2025	362,429	652,373	256,376	27,578	9.3
2028	362,468	652,443	256,404	27,578	9.3
2031	361,751	651,152	255,896	27,578	9.3
2034	360,412	648,741	254,949	27,578	9.2
2038	358,098	644,576	253,312	27,578	9.2

Source: Nexus analysis

#### Restaurants, Pubs, Bars and Café Capacity

- 4.87 We have undertaken an assessment of the potential capacity for additional food and beverage floorspace across the Borough, utilising current market shares as identified through the household survey, population and spending growth rates and benchmarking against current levels of provision.
- 4.88 This exercise identifies the future spending available to support additional food and beverage floorspace (in the form of restaurants, pubs, bars, café etc.) over the Plan period to 2038. This approach is not prescriptive, but instead provides an indication of the scope for future development to be supported, in addition to the findings of the assessments of the key centres.
- 4.89 Experian provides localised data on spending on restaurants and cafés per capita, which includes spending on alcoholic drinks (away from home) and take-away meals. In 2025, this spending was projected to be an average of £1,272 per person for residents in the Study Area (2023 prices). This is considerably lower when compared to other areas of the UK and Ireland.
- 4.90 Taking into account the population growth, and anticipated leisure spending growth rates (Experian Retail Planner 22, Figure 1a), we calculate, in the figures below, the projected total spend across the Local Development Plan period. Total spend is projected to grow from £450.5m in 2025 to £483.4m in 2038.
- 4.91 This spending is then attributed to the restaurant, café and bar facilities within Causeway Coast and Glens. The household survey results (Q43 and Q45) showed that restaurants in the Borough retained 45.3% of expenditure in the Study Area, whereas pubs and bars in the Borough retained 42.4% of expenditure in the Study Area.
- 4.92 Growing the 'benchmark' turnover of facilities from current levels on the basis of changing leisure sales densities (as outlined Figure 2 of the RPBN 22) through extensions and trading efficiencies over the Plan period, we find a total food and beverage spending surplus across the Study Area by 2038 of £12.3m.

- 4.93 Adopting an average sales density of £5,000 per sqm at 2025 (again, projected to grow in line with changing leisure sales densities) we calculate the typical restaurant, pub, bar and café floorspace that could be supported by the identified surplus expenditure. This exercise illustrates that there is modest capacity for additional floorspace, starting at 537 sqm in 2028, and rising to 2,424 sqm by 2038.

Figure 4.93.1 Restaurants, Pubs, Bars and Café Capacity

	2025	2028	2031	2034	2038
Survey Derived Turnover of all Leisure Floorspace (£m)	£201.0	£204.1	£207.4	£211.0	£215.7
Total Forecast "Benchmark" Turnover of all Floorspace (£m)	£201.0	£201.4	£202.0	£202.6	£203.4
Surplus Expenditure (£m)	£0.0	£2.7	£5.4	£8.4	£12.3
Estimated Average Sales Density of New Floorspace (£ per sqm)	£5,000	£5,010	£5,025	£5,040	£5,060
MAXIMUM "Net" Floorspace Capacity (sqm)		537	1,077	1,676	2,424

Source: Nexus analysis

- 4.94 Additionally, answers to Question 56 of the household survey demonstrated that there is significant demand from Study Area residents for more restaurants, pubs and bars.
- 4.95 As outlined in Section 3, the past few years have been incredibly volatile for the hospitality industry, due to the pandemic and cost-of-living crisis. Whilst our figures show that there is likely to be some pent-up consumer demand for additional spending in this area, this does not mean that all of that demand should be met through new floorspace. The potential re-occupation of vacant floorspace should be accounted for in the first instance.

#### Ten-Pin Bowling Capacity

- 4.96 The Borough only has one bowling alley, located at the Jet Centre in Coleraine, which has 14 lanes, and another four mini-bowling lanes for children. This was the most popular bowling destination in the Study Area, attracting 63.7% of visits from respondents.
- 4.97 Ten-pin bowling has generally experienced a decline over the last decade, with a gradual reduction in the number of facilities. In 2014, Mintel identified that there were 5,617 bowling lanes<sup>29</sup>, a decrease since 2011 where 5,773 bowling lanes were identified<sup>30</sup>. More recent data from 2021 suggests that this number has declined further to around 3,700 lanes across the UK<sup>31</sup>.
- 4.98 Taking into account the UK population at the time this latest data was produced (67.1 million<sup>32</sup>), this equates to one lane for every 18,135 persons.

<sup>29</sup> 'Ten-pin Bowling – UK', Mintel, May 2014

<sup>30</sup> 'Ten-pin Bowling – UK', Mintel, November 2011

<sup>31</sup> [Go Tenpin - Find Your Nearest Tenpin Bowling Alley in the UK](#)

<sup>32</sup> As identified by the ONS Population Estimates for the UK

Figure 4.98.1 Bowling Lane Capacity

Year	Study Area Population	Population per Bowling Alley	Lanes Supported
2025	362,429	18,135	20.0
2028	362,468	18,135	20.0
2031	361,751	18,135	19.9
2034	360,412	18,135	19.9
2038	358,098	18,135	19.7

Source: Nexus analysis

- 4.99 The figure above indicates that, based on the assumed benchmark, the population of the Study Area could support almost 20 bowling lanes by 2038. Given that there are currently only 14 full-sized lanes in the Borough, located at the same venue, this suggests that there is a level of demand not being met by current provision.

#### Other Leisure Uses

- 4.100 5.2% of survey respondents indicated they would like to see more swimming pools in the area. The Borough has three publicly-owned swimming pools, located at Coleraine Leisure Centre, Joey Dunlop Leisure Centre and Roe Valley Leisure Centre. In addition, it is understood that a new leisure centre is due to open in Ballycastle by the end of 2026 which will include a new 25m swimming pool. According to research from Leisure DB, there were 4,272 swimming pools in the UK as of 2024<sup>33</sup>. This equates to one swimming pool for every 16,206 persons. Applying this ratio to the population of the Borough would suggest there is a need for almost ten swimming pools, well above existing provision.
- 4.101 Participation in cultural activities, such as theatre, concerts, museums and galleries, within the Study Area is well below national averages. Of those who do participate, more than half travel to Belfast City Centre, and relatively little of these activities are carried out within the Borough. This would suggest that low participation rates are in part influenced by lack of opportunity and limited facilities within the Borough.

#### Leisure – Summary

- 4.102 The above findings present the quantitative and qualitative capacity for new leisure development in Causeway Coast and Glens. As we noted earlier in this Study, leisure spending is not undertaken as regularly and residents will often visit a variety of different facilities depending on a number of factors.
- 4.103 Leisure participation rates in the Study Area are lower across all categories in comparison to what we have observed in similar studies across the UK and Ireland. Looking to residents of Zones 1-4, the majority of leisure activity is retained within the Borough, although in some typologies there is leakage outside of the Borough, notably in cultural activities.
- 4.104 Our benchmarking exercises show that in the categories of swimming pools and bowling alleys there is a slight shortfall in existing provision. Due to a projected increase in food and beverage spending, there is also scope for the Borough's population to be able to support additional restaurant and pub/bar floorspace.

<sup>33</sup> The State of the UK Swimming Industry Report 2024, Leisure Database Company, 2024

## 5. Summary

### Introduction

- 5.1 This Study will form part of the evidence base upon which the emerging Causeway Coast and Glens Local Development Plan (up to 2038) will be established. It builds on the earlier, similar, study prepared by Nexus in 2017 (updated in 2020), and has used the 2017 and 2020 findings as a benchmark for comparison.

### Trends

- 5.2 Section 2 of the Study examined prevailing economic, market and social trends which are impacting main town centre uses. In this regard, evidence shows that the retail market in particular remains highly challenging, shaped by shifts in consumer behaviour, the continued growth of online shopping, and wider economic pressures. In this context, we noted that it is essential that great care is taken to protect and support town centres, ensuring their long-term vitality and viability. This approach is firmly underpinned by the policy guidance set out in the SPPS (2015). The SPPS establishes a clear 'town centres first' approach, which is designed to direct retail and other key town centre uses to established centres in order to support their vitality and viability.

### Health-checks

- 5.3 Building on this work, Section 3 of the Study sets out a health-check assessment of the Borough's six main towns. Broadly speaking, those health-checks show that each of the centres has changed over the period 2017-2025 in line with UK and NI trends in respect of an increasing reliance on services, with reducing proportions of comparison goods retailing. This is especially apparent in larger centres such as Coleraine and Limavady. Each of the centres are pleasant to walk around and have many positive attributes including well-kept shop frontages and signs of public and private investment in the public realm. Notwithstanding, the centres are generally faring poorly in terms of vacancy rates, with all but one centre having a vacancy rate above the UK average (14.2%) and all but two centres exceeding the NI average (20.8%). Of particular note are the high vacancy rates in Ballycastle (29.8%), Coleraine (28.2%), Ballymoney (26.9%) and Limavady (22.7%). Portstewart is lower than the NI average (14.6%) and Portrush is lower than both the UK and NI averages (11.7%).

### Retail Capacity

- 5.4 Section 4 of the Study examines market share and capacity. A new household telephone survey and the latest empirical data on population and expenditure growth is combined to set out forecasting for future floorspace needs to the end of the Plan period at 2038. Our detailed assessments for retail floorspace are summarised below.

Town	Convenience Floorspace Capacity (sq m net)	Comparison Floorspace Capacity (sq m net)
Coleraine	2,700 to 3,400	-3,100 to -4,800
Limavady	1,500 to 1,900	-1,000 to -1,600
Portrush	0	-100
Portstewart	-100 to -200	-100 to -200
Ballycastle	-100	-100
Ballymoney	1,000 to 1,300	-800 to -1,300
Rest of Causeway Coast and Glens	-400 to -500	-200 to -400
<b>Total (Causeway Coast and Glens)</b>	<b>4,600 to 5,900</b>	<b>-5,400 to -8,500</b>

- 5.5 Our assessment shows a significantly contrasting picture between convenience goods and comparison goods within the Borough as a whole, and between different centres. Overall, there is identified capacity for new convenience goods floorspace over the period to 2038. However, the identified capacity is not extensive at 4,600 to 5,900 sq m net. For ease of reference, these numbers would fit within the sales area of the Asda in Coleraine (4,781 sq m net). There is also a geographical difference, with positive capacity identified in Coleraine, Limavady and Ballymoney. No capacity is identified in Portrush, Portstewart, Ballycastle or elsewhere in the Borough.
- 5.6 Whilst convenience goods capacity is identified in Coleraine, Limavady and Ballymoney, a town centres first principle should be followed in line with SPPS guidance. On this point, 'capacity' should not be conflated with 'need'. Capacity is an important but theoretical exercise in population and expenditure growth. Whilst it is important to meet the general needs of the population and to ensure choice and competition, the simple existence of capacity does not mean that new floorspace has to be provided. Having regard to the SPPS, new floorspace should only be provided where the sequential test has been demonstrated, and where there is shown to be no 'significant adverse' impact of doing so. Evidence of quantitative need and qualitative need should support any impact assessment.
- 5.7 At relatively low pots of up to 3,400 sq m net in any one town, we recommend that any convenience goods capacity should first support existing town centre businesses who may wish to expand, and that there is no requirement to identify any specific locations for new convenience goods development.
- 5.8 The outlook with regard to comparison goods is more uniform. The assessment shows that there is no capacity for new comparison goods floorspace to the end of the Plan period in the Borough as a whole, and when each of the towns is considered in isolation. This is due to combination of declining spend and a likely over-provision of existing comparison goods floorspace.

### Leisure Capacity

- 5.9 The assessment in Section 6 considers surveyed participation rates and market shares for a range of commercial leisure pursuits. Our benchmarking exercises show that in the categories of swimming pools and bowling alleys there is a slight shortfall in existing provision. Due to a projected increase in food and beverage spending, there is also scope for the Borough's population to be able to support additional restaurant and pub/bar floorspace (up to c2,500 sq m by 2038).

## Glossary of Terms

<b>Bulky goods:</b>	Goods of a large physical nature (for example DIY, furniture, carpets) that sometimes require large areas for storage or display.
<b>Capacity:</b>	Forecast resident spending within the catchment area, with which to support existing and additional retail floorspace.
<b>Comparison Goods:</b>	Retail items not bought on a frequent basis, for example televisions and white goods (fridges, dishwashers etc.).
<b>Convenience Goods:</b>	Everyday essential items, such as food.
<b>Edge-of-Centre:</b>	For retail purposes, a location that is well connected and up to 300 metres from the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. In determining whether a site falls within the definition of edge-of centre, account should be taken of local circumstances. <i>Source: SPPS</i>
<b>Expenditure per Capita:</b>	The amount of money spent on retail goods per person in each Zone across the Study Area.
<b>Expenditure:</b>	Average annual expenditure levels for various forms of goods, multiplied by the population within the defined Study Area.
<b>Experian Goad:</b>	Experian Goad is a retail property intelligence system that helps retail developers, property investors, planning professionals, and commercial agents to identify profitable locations for retail property development and investment projects. It offers comprehensive retail location plans and easy to use reports covering over 3,000 shopping areas in the UK.
<b>Experian AppLibrary:</b>	A population, expenditure and socio-demographic dataset that utilises the 2021 Census release, projected forward by using growth rates derived from NISRA projections and current age and gender estimates.
<b>Financial &amp; Business Services:</b>	An Experian Goad category comprising the likes of banks, building societies, employment agencies, legal services, estate agents and business services. <i>Source: Experian Goad</i>
<b>Goad Plans:</b>	A plan showing a bird's eye view of a town centre including the exact location of all retail outlets and vacant premises, fascia name, retail category, and floor space. Key location factors such as pedestrian zones, road crossings, bus stops and car parks are also featured, allowing you to instantly assess the site quality of existing or prospective store locations. <i>Source: Experian</i>
<b>Independent Retailers:</b>	Retailers with less than ten outlets/ stores. <i>Source: Experian</i>

<b>Leisure Services:</b>	An Experian Goad category for town centre leisure units which includes bars, cafes, cinemas, nightclubs, take-aways, hotels, public houses and restaurants. For clarity, it does not include facilities for leisure pursuits e.g. sports centres, swimming pools or health & fitness clubs. <i>Source: Experian Goad</i>
<b>Market Share:</b>	The proportion of residents that visit a particular retail destination, derived from household survey results.
<b>National Multiple:</b>	Defined as retailers with ten or more stores/ outlets. <i>Source: Experian</i>
<b>Primary Retail Core:</b>	Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage). <i>Source: SPPS</i>
<b>Retail Floorspace:</b>	Total floor area of the property that is associated with all retail uses in square metres. May be expressed as a net figure (the sales area) or in gross (including storage, preparation and staff areas).
<b>Retail Impact:</b>	The potential effects of proposed retail development upon existing shops.
<b>Retail Services:</b>	An Experian Goad category comprising the likes of dry cleaners, health & beauty, opticians, photo processing, post offices and travel agents. <i>Source: Experian Goad</i>
<b>Sales Density:</b>	Turnover, per square metre. Various retail planning sources such as Verdict UK Food & Grocery Company Briefing Reports and Mintel Retail Rankings provide average (or benchmark) sales densities for national multiple convenience retailers.
<b>Sequential Approach:</b>	A planning principle that seeks to identify, allocate or develop certain types or locations of land before others. For example, brownfield housing sites before greenfield sites, or town centre retail sites before out-of-centre sites.
<b>Special Forms of Trading:</b>	Special forms of trading (SFT) are defined 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. <i>Source: Experian</i>
<b>Turnover:</b>	Amount of sales per unit area of retail floorspace
<b>Town Centre:</b>	Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Development Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.

## Appendix A – Study Area Plan

## Study Area



Scale: 1:500,000

© OpenStreetMap

## Appendix B – Study Area Household Survey (NEMS)



NEMS market research  
22 Manor Way  
Belasis Hall Technology Park  
Billingham  
TS23 4HN  
Tel 01642 37 33 55  
[www.nemsmr.co.uk](http://www.nemsmr.co.uk)

**Causeway Coast & Glens  
Household Survey  
for  
Nexus Planning**

**July 2025**

Job Ref: 060A25

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### Sample Questionnaire

# Introduction

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## 1.1 Research Background & Objectives

To conduct a survey amongst residents in and around the Causeway Coast & Glens Borough Council area to assess shopping habits for main food and grocery, top-up food, non-food shopping, leisure activities and local centre usage.

## 1.2 Research Methodology

A total of 700 interviews were conducted between Wednesday 25<sup>th</sup> June and Saturday 19<sup>th</sup> July 2024. Interviews were conducted using NEMS in-house CATI (Computer Assisted Telephone Interviewing) Unit. Respondents were contacted during the day and in the evening. All respondents were the main shopper in the household, determined using a preliminary filter question.

## 1.3 Sampling

### 1.3.1 Survey Area

The survey area was segmented into 7 zones defined by postcode sectors. The zone details were:

Zone	Postcode Sectors	Number of Interviews
1 - Limavady	BT49 0, BT49 9, BT47 4	100
2 - Coleraine	BT51 3, BT51 4, BT51 5, BT52 1, BT52 2, BT55 7, BT56 8, BT57 8	100
3 - Ballymoney	BT44 8, BT44 9, BT53 6, BT53 7, BT53 8	100
4 - The Glens	BT44 0, BT54 6	100
5 - Ballymena	BT42 1, BT42 4, BT43 5, BT43 6, BT43 7	100
6 - Magherafelt	BT45 5, BT45 7, BT45 8, BT46 5, BT79 8	100
7 - Londonderry	BT47 2, BT47 3, BT47 5, BT47 6, BT48 0, BT48 6, BT48 7, BT48 8, BT48 9, BT82 0	100
<b>Total</b>		<b>700</b>

### 1.3.2 Telephone Numbers

The **landline** numbers are generated through a process known as Random Digit Dialling (RDD), whereby we start with known 'seed' numbers and then generate all possible number combinations around these. Known business numbers are removed and the remaining numbers are randomly sorted to give each number the same and equal chance of being selected.

The benefit of using RDD numbers (as opposed to those generated from pre-existing lists such as telephone directories and Electoral Register entries) is that ex-directory numbers are also included in the survey sample. In practice, this means that the sample provided is in no way preselected, and that consumers who had opted-out of providing their telephone contact details to directory operators had the opportunity to take part in the research, thereby removing potential bias in the sample.

**Mobile** numbers were also included in the survey sample to further increase the inclusivity of the survey, given the increase in the number of mobile-only households amongst certain demographic groups (especially younger people and lower income households). These numbers are generated from a variety of commercial sources, where permission has been given to use such contact information for research and marketing purposes.

We don't screen against the TPS (Telephone Preference Service) database, again because the demographic profile of TPS registered numbers is slightly different to the rest of the population. In addition, there is no legal requirement to screen against TPS registered numbers; market research is not classified as unsolicited sales and marketing.

### 1.3.3 Time of Interviewing

Approximately two-thirds of all calls are made outside normal working hours.

#### **1.3.4 Sample Profile**

It should be noted that as per the survey's requirements, the profile of respondents is that of the main shopper / person responsible for most of the food shopping in the household. As such it will always differ from the demographic profile of all adults within the survey area. With any survey among the main shopper / person responsible for most of the food shopping in the household the profile is typically biased more towards females and older people. The age of the main shopper / person responsible for most of the food shopping in the household is becoming older due to the financial constraints on young people setting up home.

A number of measures are put in place to ensure the sample is representative of the profile of the person responsible for most of the food / shopping in the household.

First of all, interviewing is normally spread over a relatively long period of time, certainly longer than the theoretical minimum time it would take. This allows us time to call back people who weren't in when we made the first phone call. If we only interview people who are at home the first time we call, we over-represent people who stay at home the most; these people tend to be older / less economically active.

We also control the age profile of respondents; this is a two-stage process. First of all, we look at the age profile of the survey area according to the latest Census figures. Using a by-product from additional data we collect from a weekly telephone survey of a representative sample of all adults across the country we know the age profile of the main shopper in any given area. This information is from data based on in excess of 100,000 interviews and is regularly updated and is therefore probably the most accurate and up to date information of its kind.

Stratified random sampling helps ensure that the sample is as representative as possible. While the system dials the next randomly selected number for interviewers, all calls are made by interviewers; no automated call handling systems are used.

#### **1.3.5 Monitoring of Calls**

At least 5% of telephone interviews are randomly and remotely monitored by Team Leaders to ensure the interviewing is conducted to the requisite standard. Both the dialogue and on-screen entries are monitored and evaluated. Interviewers are offered re-training should these standards not be met.

## 1.4 Weightings

To correct the small differences between the sample profile and population profile, the data was weighted. The population is of the main shopper in the household. Weightings have been applied to age bands based on an estimated age profile of main shoppers (see section 1.3.3 for details). The weighted totals differ occasionally from the adjusted population due to rounding error. Details of the age weightings are given in the table below:

Age	Main Shopper Profile (%)	Interviews Achieved	Age Weightings
18-34	20.4%	66	2.1327
35-44	17.6%	60	2.0563
45-54	18.1%	85	1.4900
55-64	17.6%	92	1.3405
65+	26.3%	396	0.4641
<b>Total</b>		<b>700</b>	

Further weightings were then applied to the zone data, to adjust zone samples to be representative by population. Details of those weightings are given in the table below:

Zone	Population *	Interviews Achieved	Interviews Achieved (Weighted by Age)	Zone Weightings
1	36,214	100	71	0.8702
2	60,911	100	120	1.2527
3	42,932	100	85	0.8645
4	14,981	100	30	0.2783
5	42,302	100	83	0.7750
6	42,501	100	84	0.8750
7	114,834	100	227	1.9868
<b>Total</b>	<b>354,675</b>	<b>700</b>	<b>700</b>	

\* Source: 2021 Census

## 1.5 Statistical Accuracy

As with any data collection where a sample is being drawn to represent a population, there is potentially a difference between the response from the sample and the true situation in the population as a whole. Many steps have been taken to help minimise this difference (e.g. random sample selection, questionnaire construction etc) but there is always potentially a difference between the sample and population – this is known as the standard error.

The standard error can be estimated using statistical calculations based on the sample size, the population size and the level of response measured (as you would expect you can potentially get a larger error in a 50% response than say a 10% response simply because of the magnitude of the numbers).

To help understand the significance of this error, it is normally expressed as a confidence interval for the results. Clearly to have 100% accuracy of the results would require you to sample the entire population. The usual confidence interval used is 95% - this means that you can be confident that in 19 out of 20 instances the actual population behaviour will be within the confidence interval range.

*For example, if 50% of a sample of 700 answers “Yes” to a question, we can be 95% sure that between 46.3% and 53.7% of the population holds the same opinion (i.e. +/- 3.7%).* The following is a guide showing confidence intervals attached to various sample sizes from the study:

%ge Response	95% confidence interval
10%	±2.2%
20%	±3.0%
30%	±3.4%
40%	±3.6%
50%	±3.7%

## 1.6 Data Tables

Tables are presented in question order with the question number analysed shown at the top of the table. Those questions where the respondent is prompted with a list of possible answers are indicated in the question text with a suffix of [PR].

The sample size for each question and corresponding column criteria is shown at the base of each table. A description of the criteria determining to whom the question applies is shown in italics directly below the question text; if there is no such text evident then the question base is the full study sample. If the tabulated data is weighted (indicated in the header of the tabulations), in addition to the sample base, the weighted base is also shown at the bottom of each table.

Unless indicated otherwise in the footer of the tabulations, all percentages are calculated down the column. Arithmetic rounding to whole numbers may mean that columns of percentages do not sum to exactly 100%. Zero per cent denotes a percentage of less than 0.05%.

Percentages are calculated on the number of respondents and not the number of responses. This means that where more than one answer can be given to a question the sum of percentages may exceed 100%. All such multi-response questions are indicated in the tabulated by a suffix of [MR] on the question text.

Where appropriate to the question, means are shown at the bottom of response tables. These are calculated in one of two ways: if the data is captured to a coded response a weighted mean is calculated and the code weightings are shown as a prefix above the question text; if actual specific values were captured from respondents these individual numbers are used to calculate the mean.

## **Appendix 6:**

**Data Tabulations**  
**By Zone Filt Nulls and SFTs**  
**(Weighted)**

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7								
<b>Q01 Where did you last undertake your household's main food and grocery shopping?</b>																
<i>Excl. Nulls &amp; SFT</i>																
<b>Zone 1</b>																
Centra Store, Ballyquin Road, Limavady, BT49 9EY	0.3%	2	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0		
Costcutter, Main Street, Claudy, BT47 4HR	0.3%	2	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0		
Eurospar, Station Road, Dungiven, BT47 4LN	0.2%	1	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0		
Lidl, Main Street, Limavady, BT49 0EP	2.2%	14	14.1%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	4		
Local shops, Dungiven Town Centre	0.1%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0		
Local shops, Limavady Town Centre	0.2%	1	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0		
Spar, Anderson Park, Bovally, Limavady, BT49 0TF	0.6%	4	5.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0		
Spar, Ballyclose Street, Limavady, BT49 0BN	0.1%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0		
Spar, Glenroe Park, Dungiven, BT47 4PE	0.1%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0		
Spar, Seacoast Road, Bellarena, BT49 0LD	0.1%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0		
Supervalu, Garvagh Road, Dungiven, BT47 4LT	0.2%	1	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0		
Supervalu, Market Street, Limavady, BT49 0AB	0.9%	5	6.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1		
Tesco Superstore, Main Street, Limavady, BT49 0ET	6.4%	40	50.3%	35	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	5		
<b>Zone 2</b>																
Asda, Ring Road, Coleraine, BT52 1QP	3.3%	20	1.9%	1	11.5%	12	7.2%	5	0.0%	0	0.0%	0	2.1%	2	0.0%	0
Co-op, Lower Main Street, Bushmills, BT57 8QA	0.9%	6	0.0%	0	5.1%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Eurospar, Knocklynn Mountsandel, Sandel Local Centre, Knocklynn Road, Coleraine, BT52 1WT	0.4%	3	0.0%	0	2.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Eurospar, Main Street, Garvagh, BT51 5AA	0.3%	2	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0
Iceland, Railway Road, Coleraine, BT52 1PE	0.5%	3	0.0%	0	2.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Glenmanus Road, Portrush, BT56 8HN	0.2%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Riverside Retail Park, Coleraine, BT51 3QQ	1.7%	10	0.0%	0	8.8%	10	0.0%	0	0.6%	0	0.0%	0	1.1%	1	0.0%	0
Local shops, Coleraine Town Centre	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Portrush Town Centre	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mace (Stevenson's), Bridge Street, Kilrea, BT51 5RS	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0
Marks & Spencer (M&S Foodhall), Riverside Retail Park, Coleraine, BT51 3AW	1.2%	8	0.0%	0	3.5%	4	5.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Riverside Retail Park, Coleraine, BT51 3QQ	4.9%	30	1.8%	1	19.7%	21	5.6%	4	1.2%	0	0.0%	0	1.1%	1	1.3%	3
Supervalu, Main Street, Garvagh, BT51 5AD	0.6%	4	0.0%	0	3.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Supervalu, Station Road, Portstewart, BT55 7PU	0.2%	1	0.6%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Bannfield Road, Coleraine, BT52 1HU	4.3%	26	0.6%	0	23.2%	25	0.6%	0	0.6%	0	0.0%	0	0.5%	0	0.0%	0
Tesco Superstore, Coleraine Road, Portstewart, BT55 7PL	1.2%	7	0.0%	0	6.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
<b>Zone 3</b>								
Costcutter, Main Street, Portglenone, BT44 8AB	0.1%	0	0.0%	0	0.0%	0	0.6%	0
Eurospar (Fullan's FoodHall), Main Street, Portglenone, BT44 8HR	0.3%	2	0.0%	0	0.5%	1	0.6%	0
Eurospar (Moore's of Cloughmills), Main Street, Cloughmills, BT44 9LF	0.1%	0	0.0%	0	0.0%	0	0.6%	0
Eurospar, John Street, Ballymoney, BT53 6DS	0.7%	4	0.0%	0	0.5%	1	5.4%	4
Home Bargains, Castle Street, Ballymoney, BT53 6LL	0.5%	3	0.0%	0	0.0%	0	4.2%	3
Lidl, Meeting House Street, Ballymoney, BT53 6JN	1.3%	8	0.0%	0	2.3%	2	8.1%	6
Supervalu (McCool's), Ballymena Road, Ballymoney, BT53 7AB	0.1%	1	0.0%	0	0.0%	0	1.1%	1
Tesco Superstore, Castle Street, Ballymoney, BT53 6JT	6.3%	39	0.0%	0	3.3%	4	49.4%	35
<b>Zone 4</b>								
Co-op, The Diamond, Ballycastle, BT54 6AW	0.2%	1	0.0%	0	0.0%	0	0.0%	0
Eurospar, Coast Road, Cushendall, BT44 0RU	0.2%	1	0.0%	0	0.0%	0	0.0%	0
Eurospar, Ramoan Road, Ballycastle, BT54 6EG	0.6%	4	0.0%	0	0.0%	0	1.1%	1
Lidl, Larne Link Road, Ballymena, BT44 0BD	0.9%	5	0.0%	0	0.0%	0	0.0%	0
Mace, High Street, Carnlough, BT44 0EP	0.0%	0	0.0%	0	0.0%	0	0.0%	0
McLister's Ballycastle, Ann Street, Ballycastle, BT54 6AA	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Harbour Road, Carnlough, BT44 0EU	0.3%	2	0.0%	0	0.0%	0	0.0%	0
Spar, Moyle Road, Ballycastle, BT54 6LG	0.0%	0	0.0%	0	0.0%	0	0.0%	0
<b>Zone 5</b>								
Eurospar, Main Street, Cullybackey, BT42 1BW	0.1%	1	0.0%	0	0.0%	0	0.0%	0
Iceland, High Street, Ballymena, BT43 6DT	1.1%	7	0.0%	0	0.0%	0	0.0%	0
Local shops, Broughshane Village Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer (M&S Store), The Fairhill Shopping Centre, Ballymena, BT43 6UG	1.2%	8	0.0%	0	0.0%	0	2.4%	2
Robinsons Supermarket, Cullybackey Road, Ballymena, BT43 5JH	0.1%	0	0.0%	0	0.0%	0	0.6%	0
Spar, Glenravel Road, Martinstown, Ballymena, BT43 6QQ	0.3%	2	0.0%	0	1.7%	2	0.0%	0
Vivo Shop (McNeills), Main Street, Broughshane, BT42 4JW	0.1%	0	0.0%	0	0.0%	0	0.0%	0
<b>Zone 6</b>								
Crawfords, Main Street, Maghera, BT46 5AE	0.6%	4	0.0%	0	0.0%	0	0.0%	0
Eurospar (JC Stewart Foodhall), Union Road, Magherafelt, BT45 5ED	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Eurospar, Main Street, Maghera, BT46 5AB	0.6%	4	0.0%	0	0.0%	0	0.0%	0
Eurospar, St Patricks Street, Draperstown, BT45 7AJ	0.6%	4	0.0%	0	0.0%	0	0.0%	0
McAlinden Meats, Rainey Street, Magherafelt, BT45 5AG	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Nisa Local (Muldoons)	0.1%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
William Street, Bellaghy, BT45 8HZ								
Spar (Grahams), Main Street, Bellaghy, BT45 8HS	0.1%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.5%	0 0.0%
Spar (Kelly's), Coleraine Road, Maghera, BT46 5BN	0.1%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.5%	0 0.0%	0 0.0%
Spar, Main Street, Castledawson, BT45 8AA	0.1%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.5%	0 0.0%	0 0.0%
Spar, Union Road, Magherafelt, BT45 5ED	0.1%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.5%	0 0.0%	0 0.0%
Today's Local (Pinkerton's), Main Street, Plumbridge, BT79 8AA	0.2%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 1.7%	1 0.0%	0 0.0%
<b>Zone 7</b>								
Costcutter, Beechwood Avenue, Londonderry, BT48 9LS	0.1%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.5%	1 0.0%
Dunnes Stores, Springtown Centre, Northland Road, Londonderry, BT48 0PU	1.8%	11 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 5.5%	11 0.0%
Eurospar, Clooney Road, Greysteel, BT47 3DY	0.3%	2 2.7%	2 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Iceland, Buncrana Road, Londonderry, BT48 8AB	0.7%	4 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 2.1%	4 0.0%
Iceland, Foyleside Shopping Centre, Londonderry, BT48 6XY	0.5%	3 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 1.5%	3 0.0%
Lidl, Buncrana Road / Springtown Road, Londonderry, BT48 0LY	2.8%	17 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 8.7%	17 0.0%
Marks & Spencer (M&S Simply Food), Crescent Link Retail Park, Londonderry, BT47 6SA	3.1%	20 0.6%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 9.5%	19 0.0%
Marks & Spencer (M&S Store), Foyleside Shopping Centre, Londonderry, BT48 6XY	1.8%	11 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 5.5%	11 0.0%
Nisa Local, Buncrana Road, Londonderry, BT48 8LB	0.7%	4 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 2.0%	4 0.0%
Sainsbury's Superstore, Strand Road, Londonderry, BT48 7TL	5.9%	37 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 18.3%	37 0.0%
Spar, Main Street, Eglinton, BT47 3AA	0.1%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.5%	1 0.0%
Supervalu (Long's), Blackburn Crescent, Waterside, Londonderry, BT47 5QG	0.8%	5 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 2.4%	5 0.0%
Supervalu (Long's), Duncastle Road, Newbuildings, Londonderry, BT47 2SF	0.6%	4 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 1.8%	4 0.0%
Supervalu, Main Street, Eglinton, BT47 3PQ	0.1%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.5%	1 0.0%
Supervalu, Northside Village Centre, Shantallow, Londonderry, BT48 8NN	0.7%	4 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 2.0%	4 0.0%
Tesco Superstore, Lisnagelvin Shopping Centre, Londonderry, BT47 6DA	6.8%	42 2.5%	2 0.0%	0 0.0%	0 0.0%	0 0.0%	0 20.3%	41 0.0%
Tesco Superstore, Quayside Centre, Strand Road, Londonderry, BT48 7PX	1.6%	10 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 4.8%	10 0.0%
<b>Outside Survey Area</b>								
Asda, Branch Road, Strabane, BT82 8EQ	1.7%	11 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 5.3%	11 0.0%
Asda, Dromore Road, Omagh, BT78 1QZ	0.1%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 0.0%	0 0.0%
Asda, Redlands Road, Larne, BT40 1AX	0.4%	3 0.0%	0 0.0%	0 0.0%	0 12.4%	3 0.0%	0 0.0%	0 0.0%
Asda, Sweep Road,	0.4%	3 0.0%	0 0.0%	0 0.0%	0 0.0%	0 3.6%	3 0.0%	0 0.0%

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7								
Cookstown, BT80 8JR																
Asda, The Junction Shopping Complex, Antrim, BT41 4GY	0.7%	4	0.0%	0	0.0%	0	2.6%	2	0.0%	0	0.0%	0	3.3%	2	0.0%	0
Centra Store, Antrim Road, Ballymena, BT42 2BJ	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0
Dunnes Stores, Spillars Place, Irishtown Road, Omagh, BT78 1EY	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2	0.0%	0
Eurospar, Brownstown Road, Portadown, BT62 4EB	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0
Home Bargains, Circular Road, Larn, BT40 3AH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Queen Street, Ballymena, BT42 2BG	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Meadow Lane Shopping Centre, Magherafelt, BT45 6PR	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	3	0.0%	0
Lidl, Castledawson Road, Magherafelt, BT45 6PA	2.1%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.4%	13	0.0%	0
Lidl, Circular Road, Larne, BT40 1JS	0.2%	1	0.0%	0	0.0%	0	0.0%	0	6.1%	1	0.0%	0	0.0%	0	0.0%	0
Lidl, Station Square Retail Park, Cookstown, BT80 8PA	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0
Lidl, Strabane Shopping Park, Bradley Way, Strabane, BT82 8EW	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	2
Local shops, Cookstown Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0
Marks & Spencer (M&S Foodhall), Orritor Road Retail Park, Cookstown, BT80 8BH	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0
Sainsbury's Superstore, Braidwater Retail Park, Ballymena, BT42 3AG	2.9%	18	0.0%	0	0.0%	0	1.1%	1	4.5%	1	20.1%	15	1.1%	1	0.0%	0
Tesco Superstore, Abbey Retail Park, Church Road, Newtownabbey, BT36 7GU	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0
Tesco Superstore, Ballyronan Road, Magherafelt, BT45 6BP	3.2%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.3%	20	0.0%	0
Tesco Superstore, Larne Road, Ballymena, BT42 3HB	8.6%	53	0.0%	0	0.0%	0	3.4%	2	25.2%	6	60.1%	45	0.5%	0	0.0%	0
Tesco Superstore, Orritor Road, Cookstown, BT80 8BH	0.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.4%	6	0.0%	0
Weighted base:	621		69		108		70		22		75		75		201	
Sample:	643		97		93		90		85		94		93		91	

## Q02 For your last main food internet / home delivery shopping order, how did you receive your goods?

Those that said 'Internet / delivery at Q01'

Collection at store	3.2%	3	0.0%	0	21.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home delivery	96.8%	77	100.0%	3	79.0%	10	100.0%	14	100.0%	7	100.0%	9	100.0%	9	100.0%	25
Delivery to place of work	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Collection at click and collect hub (non-store location)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Collection at other location (Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:	79		3		12		14		7		9		9		25	
Sample:	57		3		7		10		15		6		7		9	

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
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**Q03 Which retailer do you purchase your main food internet / home delivery shopping from?**

Those that said 'Internet / delivery at Q01'

Asda	37.6%	30	85.9%	2	42.1%	5	42.5%	6	46.8%	3	57.2%	5	41.1%	4	16.7%	4
Supervalu	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland	15.1%	12	0.0%	0	21.8%	3	25.1%	4	7.9%	1	38.6%	3	21.3%	2	0.0%	0
Sainsbury's	14.1%	11	0.0%	0	9.5%	1	0.0%	0	10.9%	1	0.0%	0	0.0%	0	36.5%	9
Tesco	32.0%	25	14.1%	0	26.6%	3	32.5%	5	34.5%	3	4.2%	0	37.6%	3	43.1%	11
Marks and Spencer	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	1
(Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		79		3		12		14		7		9		9		25
Sample:		57		3		7		10		15		6		7		9

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
<b>Q04 What is the main reason you choose STORE MENTIONED AT Q01 to do your main food and grocery shopping?</b>								
Near to home	29.3%	205	22.0%	16	23.9%	29	25.7%	22
Quality of food goods available	7.6%	53	2.3%	2	8.9%	11	7.3%	6
Habit / always use it / preference for retailer	7.0%	49	8.8%	6	8.5%	10	11.5%	10
Lower prices	6.5%	46	3.4%	2	5.3%	6	12.5%	11
Value for money	6.4%	45	5.8%	4	8.4%	10	6.4%	5
Choice of food goods available	5.8%	40	6.2%	4	6.0%	7	4.5%	4
Loyalty card / points scheme	5.5%	39	9.6%	7	1.5%	2	1.9%	2
Near to work	4.5%	31	12.9%	9	3.8%	5	1.4%	1
Delivery service	3.6%	25	1.8%	1	1.0%	1	2.0%	2
Internet shopping is convenient	3.2%	23	2.2%	2	2.7%	3	6.5%	6
Car parking provision	3.1%	21	5.2%	4	3.6%	4	2.5%	2
Nice shopping environment	1.7%	12	0.0%	0	1.6%	2	3.5%	3
Easy to get to by car	1.3%	9	0.6%	0	1.6%	2	0.0%	0
Good service / friendly staff	1.1%	8	1.7%	1	0.0%	0	0.5%	0
Choice of shops nearby selling non-food goods	1.1%	8	0.0%	0	5.9%	7	0.5%	0
Choice of shops selling food goods	1.0%	7	2.6%	2	3.3%	4	0.0%	0
Can get everything I need there	0.8%	6	2.8%	2	0.0%	0	1.9%	2
Car parking prices	0.8%	6	0.0%	0	0.0%	0	0.0%	0
Only one in the area / no other choice	0.6%	4	4.7%	3	0.5%	1	0.5%	0
Good offers	0.6%	4	0.0%	0	0.5%	1	2.1%	2
Staff discount / work there	0.6%	4	0.0%	0	0.0%	0	1.4%	1
Good internal layout	0.5%	4	1.1%	1	0.5%	1	0.0%	2
Provision of leisure facilities nearby	0.5%	3	0.0%	0	1.6%	2	0.5%	0
Accessibility by public transport	0.5%	3	0.0%	0	1.9%	2	0.0%	0
I have a caravan nearby	0.4%	3	0.0%	0	0.0%	0	0.0%	0
Near to a relatives care home	0.3%	2	0.0%	0	1.6%	2	0.0%	0
Familiar / know where everything is	0.3%	2	0.0%	0	1.4%	2	0.0%	0
Provision of services nearby, such as banks and other financial services	0.2%	2	1.1%	1	0.0%	0	0.0%	0
Large store	0.2%	1	0.6%	0	0.5%	1	0.0%	0
Quality of shops selling food goods	0.2%	1	0.0%	0	0.0%	0	0.5%	1
Can use a different currency there	0.2%	1	1.8%	1	0.0%	0	0.0%	0
To support local shops	0.2%	1	0.0%	0	0.5%	1	0.5%	0
Near to my church	0.1%	1	0.0%	0	0.5%	1	0.0%	0
New store	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Free car parking	0.1%	0	0.0%	0	0.0%	0	0.0%	0
They accept vouchers	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Cleanliness	0.0%	0	0.0%	0	0.0%	0	0.4%	0
Switched due to disappointment with previous retailer	0.0%	0	0.0%	0	0.0%	0	0.4%	0
Has a post office	0.0%	0	0.0%	0	0.0%	0	0.4%	0
Safety (during the day)	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Entertainment / events	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Safety (during the evening / night time)	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good opening hours	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Public information, signposts and public facilities	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(No particular reason)	3.9%	28	2.3%	2	4.8%	6	6.1%	5
(Don't know / varies)	0.2%	2	0.6%	0	0.0%	0	0.0%	0
Weighted base:	700	71	120	85	30	83	84	227
Sample:	700	100	100	100	100	100	100	100

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7								
<b>Q05 What if anything is the one thing you most dislike about your main food and grocery shopping destination STORE MENTIONED AT Q01 ?</b>																
Expensive	10.7%	75	16.1%	12	6.4%	8	2.9%	2	2.1%	1	8.4%	7	3.1%	3	18.8%	43
Too small	4.0%	28	7.8%	6	0.0%	0	0.0%	0	3.6%	1	0.0%	0	1.0%	1	9.1%	21
Difficult to park / lack of parking	3.6%	25	0.0%	0	3.1%	4	0.5%	0	0.0%	0	3.8%	3	0.0%	0	7.8%	18
Limited range of goods	3.5%	25	1.7%	1	4.2%	5	3.8%	3	0.9%	0	1.9%	2	4.8%	4	4.1%	9
Internet issues (can't choose own produce / substitutions etc.)	2.3%	16	0.0%	0	2.1%	3	4.1%	3	12.0%	4	5.9%	5	2.2%	2	0.0%	0
Too busy	2.2%	15	1.7%	1	2.2%	3	4.5%	4	3.2%	1	3.5%	3	3.1%	3	0.4%	1
Slow service at the tills / not enough staff	2.1%	15	1.7%	1	4.1%	5	3.1%	3	0.0%	0	1.7%	1	3.5%	3	0.8%	2
Poor quality	1.4%	10	2.4%	2	1.5%	2	1.5%	1	3.3%	1	2.4%	2	0.5%	0	0.8%	2
Lack of public transport	1.2%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	8
Change layout too often	1.1%	7	0.0%	0	0.0%	0	0.5%	0	2.1%	1	6.6%	5	0.0%	0	0.4%	1
Difficult to get to	0.9%	7	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	4
Self-service checkouts	0.9%	6	1.1%	1	1.6%	2	0.5%	0	0.0%	0	1.7%	1	0.0%	0	0.8%	2
Trolleys / stock block the aisles	0.7%	5	1.6%	1	0.5%	1	0.0%	0	0.0%	0	0.4%	0	0.5%	0	1.2%	3
Not enough stock / empty shelves	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0	0.0%	0	2.1%	5
Poor internal layout	0.7%	5	0.6%	0	0.0%	0	0.5%	0	5.2%	2	2.4%	2	0.5%	0	0.0%	0
Too far away	0.6%	5	0.6%	0	1.0%	1	0.5%	0	8.6%	3	0.0%	0	0.0%	0	0.0%	0
Preference for retailer	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	4
Toilets aren't clean	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	4
Staff rude / unhelpful	0.4%	3	1.8%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Doesn't have a café	0.3%	2	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.4%	0	1.0%	1	0.0%	0
No petrol station	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0
Lack of shops nearby	0.2%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Doesn't have changing rooms	0.2%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Doesn't have a butchers / meat counter	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Doesn't have small trolleys	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Traffic congestion	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Doesn't offer scan and go	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0
Expensive parking	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0
Use too much plastic	0.1%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Too cold	0.1%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor quality trolleys	0.1%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nobody helps pack your shopping	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0	0.0%	0
Lack of cycle parking	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing)	55.2%	387	54.7%	39	68.5%	82	70.5%	60	55.0%	16	53.4%	45	75.2%	63	36.0%	82
(Don't know / varies)	5.0%	35	4.4%	3	1.9%	2	4.8%	4	3.5%	1	5.1%	4	0.5%	0	8.7%	20
Weighted base:	700	71		120		85		30		83		84		227		
Sample:	700	100		100		100		100		100		100		100		

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
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**Meanscore: [£]****Q06 How much on average does your household normally spend on main food and grocery shopping in a week?**

£1 - £5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£6 - £10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£11 - £15	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0	0.0%	1
£16 - £20	1.4%	10	0.6%	0	2.2%	3	0.9%	1	0.0%	0	0.4%	0	5.5%	5
£21 - £25	0.5%	3	2.5%	2	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1
£26 - £30	1.6%	11	1.1%	1	2.4%	3	1.4%	1	3.7%	1	0.9%	1	1.0%	1
£31 - £35	2.8%	19	2.3%	2	3.7%	4	1.5%	1	0.9%	0	1.9%	2	2.9%	2
£36 - £40	2.6%	18	2.9%	2	1.5%	2	3.8%	3	3.7%	1	0.9%	1	0.5%	0
£41 - £45	2.3%	16	5.4%	4	2.8%	3	0.9%	1	0.4%	0	2.2%	2	1.0%	1
£46 - £50	5.7%	40	9.9%	7	4.6%	5	4.9%	4	5.6%	2	1.7%	1	4.8%	4
£51 - £60	5.7%	40	8.4%	6	6.9%	8	8.3%	7	4.6%	1	4.7%	4	6.0%	5
£61 - £70	4.9%	34	8.3%	6	3.0%	4	8.8%	7	1.7%	1	6.3%	5	5.4%	5
£71 - £80	7.8%	55	6.6%	5	7.3%	9	6.5%	5	6.5%	2	5.1%	4	7.8%	7
£81 - £90	4.8%	34	3.2%	2	6.7%	8	4.2%	4	6.4%	2	5.5%	5	9.0%	8
£91 - £100	18.8%	131	13.4%	10	12.7%	15	16.6%	14	17.1%	5	23.3%	19	20.4%	17
£101 - £110	1.9%	13	6.7%	5	0.0%	0	3.0%	3	0.0%	0	0.0%	0	1.9%	2
£111 - £120	5.8%	41	0.6%	0	8.0%	10	6.4%	5	2.1%	1	4.1%	3	4.9%	4
£121 - £130	2.5%	18	6.6%	5	1.4%	2	1.4%	1	0.4%	0	0.4%	0	4.2%	4
£131 - £140	1.1%	8	0.0%	0	0.5%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0
£141 - £150	8.4%	59	6.7%	5	9.9%	12	8.4%	7	16.8%	5	11.5%	10	5.8%	5
£151 - £175	4.4%	31	5.6%	4	0.5%	1	3.7%	3	1.7%	1	5.5%	5	2.1%	2
£176 - £200	6.6%	46	0.6%	0	8.6%	10	9.3%	8	15.6%	5	15.1%	13	1.6%	1
£201 - £225	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£226 - £250	2.2%	16	0.0%	0	3.8%	5	0.0%	0	5.3%	2	2.0%	2	5.9%	5
£251 - £275	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£276 - £300	0.8%	5	0.0%	0	2.7%	3	0.0%	0	0.0%	0	0.0%	0	2.6%	2
£301+	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0
(Don't know / varies)	5.6%	39	5.7%	4	8.0%	10	7.8%	7	5.7%	2	8.5%	7	6.7%	6
(Refused)	1.5%	11	3.1%	2	2.5%	3	0.5%	0	0.0%	0	0.0%	0	2.2%	5

Mean:	105.10	86.24	111.35	102.52	124.58	118.23	105.82	101.22
Weighted base:	700	71	120	85	30	83	84	227
Sample:	700	100	100	100	100	100	100	100

**Meanscore: [Number of visits per week]****Q07 How often do you normally do your main food shopping at STORE MENTIONED AT Q01?**

Daily	1.7%	12	2.8%	2	3.4%	4	0.5%	0	1.7%	1	0.0%	0	1.6%	1	1.7%	4
At least two times a week	16.9%	119	17.6%	13	21.1%	25	11.9%	10	18.0%	5	18.3%	15	15.1%	13	16.5%	37
At least once a week	57.8%	404	61.5%	44	50.5%	61	60.1%	51	37.5%	11	57.8%	48	58.1%	49	62.0%	141
At least once a fortnight	16.4%	114	14.1%	10	12.3%	15	23.4%	20	36.7%	11	14.8%	12	20.5%	17	13.0%	29
At least once a month	5.6%	39	4.1%	3	10.2%	12	3.7%	3	3.1%	1	7.7%	6	2.6%	2	5.1%	12
At least every two months	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Less often	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Have only visited once	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	1.6%	1	0.0%	0
(Don't know / varies)	1.0%	7	0.0%	0	2.5%	3	0.5%	0	1.7%	1	0.0%	0	0.5%	0	1.3%	3

Mean:	1.15	1.24	1.29	1.00	1.08	1.04	1.13	1.17
Weighted base:	700	71	120	85	30	83	84	227
Sample:	700	100	100	100	100	100	100	100

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7								
<b>Q08 How do you normally travel to STORE MENTIONED AT Q01?</b>																
<i>Not those that said 'Internet / delivery at Q01'</i>																
Car / van (as driver)	70.2%	435	63.1%	43	79.3%	86	80.4%	56	77.7%	17	80.9%	61	69.1%	52	59.7%	120
Car / van (as passenger)	17.2%	106	24.7%	17	17.0%	18	15.7%	11	11.4%	3	15.7%	12	25.1%	19	13.4%	27
Bus (including the busway or guided bus), minibus or coach	3.6%	22	1.8%	1	1.6%	2	0.0%	0	0.6%	0	0.0%	0	1.1%	1	9.3%	19
Motorcycle, scooter or moped	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	4
Walk	7.3%	45	9.3%	6	1.6%	2	3.9%	3	10.4%	2	3.5%	3	2.6%	2	13.6%	27
Taxi	0.4%	2	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.5%	1
Train	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Metro	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bicycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mobility scooter / disability vehicle	0.6%	4	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	1.5%	3
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		621		69		108		70		22		75		75		201
Sample:		643		97		93		90		85		94		93		91

**Meanscore: [Time in minutes]****Q09 How long did your last journey to STORE MENTIONED AT Q01 take?***Not those that said 'Internet / delivery at Q01'*

1 - 10 minutes	45.0%	279	40.1%	28	51.3%	55	39.5%	28	31.4%	7	55.2%	41	53.1%	40	40.0%	80
11 - 20 minutes	35.3%	219	23.7%	16	40.4%	44	45.0%	32	21.9%	5	35.3%	26	30.3%	23	36.7%	74
21 - 30 minutes	10.7%	66	14.1%	10	4.5%	5	12.1%	9	41.3%	9	7.6%	6	13.5%	10	9.1%	18
31 - 40 minutes	2.7%	17	16.2%	11	0.0%	0	0.0%	0	4.2%	1	0.0%	0	1.1%	1	2.0%	4
41 - 50 minutes	3.2%	20	2.7%	2	1.7%	2	0.0%	0	0.0%	0	0.5%	0	2.1%	2	7.2%	14
51 - 60 minutes	1.9%	12	0.0%	0	0.5%	1	1.1%	1	0.6%	0	0.5%	0	0.0%	0	5.0%	10
Over an hour	0.5%	3	2.6%	2	0.0%	0	1.7%	1	0.0%	0	0.5%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.2%	1	0.6%	0	0.0%	0	0.6%	0	0.6%	0	0.5%	0	0.0%	0	0.0%	0
(Refused)	0.3%	2	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		16.34		20.16		12.96		16.22		19.87		13.63		14.23		18.28
Weighted base:		621		69		108		70		22		75		75		201
Sample:		643		97		93		90		85		94		93		91

**Q10 When do you do your main food shopping?**

Weekdays during the day	49.9%	349	57.2%	41	59.0%	71	46.2%	39	35.4%	10	45.5%	38	47.6%	40	48.4%	110
Weekdays during the evening	15.2%	106	11.0%	8	10.6%	13	7.2%	6	20.3%	6	11.3%	9	14.0%	12	23.1%	52
Saturday	16.3%	114	18.9%	13	9.1%	11	20.7%	18	17.7%	5	18.4%	15	17.8%	15	16.1%	36
Sunday	2.0%	14	2.4%	2	2.6%	3	0.5%	0	1.4%	0	1.2%	1	5.3%	4	1.2%	3
(Don't know / varies)	16.7%	117	10.5%	8	18.6%	22	25.4%	22	25.2%	7	23.6%	20	15.2%	13	11.3%	26
Weighted base:		700		71		120		85		30		83		84		227
Sample:		700		100		100		100		100		100		100		100

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7								
<b>Q11 When you go main food shopping is your trip linked with any other activity?</b>																
<i>Not those that said 'Internet / delivery at Q01'</i>																
Yes – non-food shopping	10.1%	63	8.9%	6	15.8%	17	10.4%	7	14.6%	3	6.9%	5	7.0%	5	9.3%	19
Yes – other food shopping	7.2%	45	9.9%	7	9.6%	10	6.3%	4	5.1%	1	8.2%	6	6.4%	5	5.5%	11
Yes – visiting services such as banks and other financial institutions	1.1%	7	0.0%	0	1.1%	1	1.1%	1	0.6%	0	0.0%	0	2.1%	2	1.5%	3
Yes – leisure activity	2.6%	16	0.6%	0	4.2%	5	0.0%	0	1.7%	0	2.2%	2	5.2%	4	2.6%	5
Yes – travelling to/from work	7.0%	44	15.1%	10	6.7%	7	0.6%	0	6.2%	1	3.1%	2	3.3%	2	9.7%	20
Yes – travelling to/from school/college/university	1.8%	11	0.0%	0	2.3%	2	0.0%	0	0.6%	0	0.0%	0	0.0%	0	4.2%	8
Yes – getting petrol	5.6%	35	4.5%	3	2.4%	3	8.5%	6	16.9%	4	10.6%	8	4.9%	4	3.8%	8
Yes – visiting café / pub / restaurant	5.0%	31	7.8%	5	3.9%	4	5.8%	4	1.2%	0	5.3%	4	5.9%	4	4.5%	9
Yes – visiting family/friends	5.2%	33	5.1%	3	7.3%	8	5.7%	4	4.5%	1	3.7%	3	4.8%	4	4.9%	10
Yes – visiting health service such as doctor, dentist, hospital	1.7%	11	0.6%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	10
Yes – visiting other service such as laundrette, hairdresser, recycling	1.5%	9	0.6%	0	2.9%	3	0.6%	0	0.6%	0	0.0%	0	0.0%	0	2.5%	5
Yes – other activity	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes – going for a walk	0.6%	3	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	1.3%	3
Yes – visiting church	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes – window shopping / browsing	0.1%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(No activity)	48.5%	301	41.8%	29	41.7%	45	55.6%	39	48.0%	11	55.7%	42	59.3%	45	45.4%	91
(Don't know / varies)	1.8%	11	4.6%	3	1.1%	1	4.7%	3	0.0%	0	4.3%	3	0.5%	0	0.0%	0
Weighted base:		621		69		108		70		22		75		75		201
Sample:		643		97		93		90		85		94		93		91

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
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**Q12 Where do you do this linked trip?**

Those who said 'Non-food shopping', 'Other food shopping' or 'visiting services such as banks and other financial institutions' at Q09 AND Excl. Nulls &amp; SFT

**Zone 1**

Lidl, Main Street, Limavady, BT49 0EP	1.4%	2	12.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
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Limavady Town Centre	10.4%	12	78.1%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	2
Tesco Superstore, Main Street, Limavady, BT49 0ET	0.4%	0	3.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

**Zone 2**

Coleraine Town Centre	9.6%	11	0.0%	0	35.1%	10	0.0%	0	2.8%	0	0.0%	0	7.0%	1	0.0%	0
Garvagh Village Centre	2.0%	2	0.0%	0	6.5%	2	0.0%	0	0.0%	0	0.0%	0	3.5%	0	0.0%	0
Larkhill Post Office, Coleraine Road, Portstewart, BT55 7HU	0.5%	1	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Portstewart Town Centre	2.8%	3	0.0%	0	11.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Riverside Retail Park (& The Jet Centre), Coleraine, BT51 3QQ	11.8%	13	6.3%	1	34.7%	10	14.1%	2	2.8%	0	0.0%	0	7.0%	1	0.0%	0

Tesco Superstore, Bannfield Road, Coleraine, BT52 1HU	0.5%	1	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
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**Zone 3**

Ballymoney Town Centre	9.3%	11	0.0%	0	6.5%	2	70.0%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dervock Village Centre	0.4%	0	0.0%	0	0.0%	0	3.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Meeting House Street, Ballymoney, BT53 6JN	0.9%	1	0.0%	0	2.0%	1	3.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

**Zone 4**

Ballycastle Town Centre	0.2%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	0	0.0%	0	0.0%	0	0.0%	0
Cushendall Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Larne Link Road, Ballymena, BT44 0BD	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.8%	2	0.0%	0	0.0%	0

**Zone 5**

Apperley's, Ballykeel Business Centre, Crebilly Road, Ballymena, BT42 4DN	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	0	0.0%	0	0.0%	0
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Ballymena Town Centre	9.5%	11	0.0%	0	0.0%	0	3.2%	0	63.3%	3	45.8%	5	21.2%	2	0.0%	0
Marks & Spencer (M&S Store), The Fairhill Shopping Centre, Ballymena, BT43 6UG	1.3%	2	0.0%	0	0.0%	0	0.0%	0	8.2%	0	10.2%	1	0.0%	0	0.0%	0

**Zone 6**

Maghera Town Centre	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	1	0.0%	0
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**Zone 7**

Crescent Link Retail Park, Londonderry, BT47 6SA	6.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.9%	8
Foyleside Shopping Centre, Orchard Street, Londonderry, BT48 6XY	3.8%	4	0.0%	0	0.0%	0	0.0%	0	2.8%	0	0.0%	0	12.9%	4

Lidl, Buncrana Road / Springfield Road, Londonderry, BT48 0LY	2.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.1%	3
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Lisnagelvin Shopping Centre, Lisnagelvin Road, Londonderry, BT47 6DF	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	2
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Londonderry City Centre	9.1%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	31.9%	10
Supervalu, Strand Road, Londonderry, BT48 7PB	2.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.0%	3

**Outside Survey Area**

Asda, Dromore Road, Omagh, BT78 1QZ	0.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	0	0.0%	0
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Braidwater Retail Park, Ballymena, BT42 3AG	1.5%	2	0.0%	0	0.0%	0	0.0%	0	5.7%	0	9.2%	1	3.5%	0	0.0%	0
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Cookstown Town Centre	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.0%	1	0.0%	0
Jollyes, Larne Road, Ballymena, BT42 3HA	0.4%	0	0.0%	0	0.0%	0	3.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Larne Town Centre	0.2%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Castledawson Road, Magherafelt, BT45 6PA	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.4%	1	0.0%	0

Lidl, Strabane Shopping Park, Bradley Way,	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1		
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Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Strabane, BT82 8EW								
Magherafelt Town Centre	2.1%	2 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 20.5%	2 0.0%
Sainsbury's Superstore, Braidwater Retail Park, Ballymena, BT42 3AG	0.4%	0 0.0%	0 0.0%	0 3.2%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Tesco Superstore, Larne Road, Ballymena, BT42 3HB	0.6%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 6.4%	1 0.0%	0 0.0%
The Bridge Retail Park, Larne Road, Ballymena, BT42 3HA	0.7%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 3.2%	0 3.5%	0 0.0%
Weighted base:	114	13	29	13	5	11	12	33
Sample:	138	26	23	16	20	18	19	16

**Q13 Do you make 'top up' shopping trips for staple goods, such as bread and milk, in between your main food shopping trip?**

Yes	71.0%	497	74.4%	53	76.0%	91	80.0%	68	67.9%	20	71.1%	59	67.9%	57	65.5%	148
No	29.0%	203	25.6%	18	24.0%	29	20.0%	17	32.1%	9	28.9%	24	32.1%	27	34.5%	78
Weighted base:		700		71		120		85		30		83		84		227
Sample:		700		100		100		100		100		100		100		100

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7								
<b>Q14 Where did you last undertake this 'top up' shopping?</b> Those that do top-up shopping at Q13 AND Excl. Nulls & SFT																
<b>Zone 1</b>																
Centra Store, Ballyquin Road, Limavady, BT49 9EY	0.8%	4	7.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costcutter, Greystone Road, Limavady, BT49 0ND	0.4%	2	4.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costcutter, Main Street, Claudy, BT47 4HR	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Costcutter, Roebank Service Station, Limavady, BT49 9DB	0.4%	2	4.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Eurospar, Station Road, Dungiven, BT47 4LN	1.1%	5	9.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Main Street, Limavady, BT49 0EP	2.1%	10	19.9%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Limavady Town Centre	0.2%	1	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marshall Howe Greengrocer, Market Street, Limavady, BT49 0AB	0.3%	1	1.6%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
McAtamneys, Main Street, Limavady, BT49 0EP	0.9%	4	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	4	0.0%	0
Spar, Anderson Park, Ballyally, Limavady, BT49 0TF	1.1%	5	9.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Ballyclose Street, Limavady, BT49 0BN	0.1%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Cooleasan Walk, Gorteen Crescent, Limavady, BT49 9EN	0.2%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Glenroe Park, Dungiven, BT47 4PE	0.1%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Irish Green Street, Limavady, BT49 9BA	0.2%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Main Street, Claudy, BT47 4HR	1.1%	5	5.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	3
Spar, Main Street, Feeny, BT47 4TD	0.2%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Seacoast Road, Bellarena, BT49 0LD	0.2%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Supervalu, Garvagh Road, Dungiven, BT47 4LT	0.4%	2	3.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Supervalu, Main Street, Ballykelly, BT49 9HS	0.1%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Supervalu, Market Street, Limavady, BT49 0AB	0.7%	3	6.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Broad Road, Limavady, BT49 0QH	0.1%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Main Street, Limavady, BT49 0ET	0.9%	4	8.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Vivo Shop (McElhinney Store), Learmount Road, Park, BT47 4BA	0.2%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Vivo Shop, Drumsurn Road, Drumsurn, BT49 0PP	0.2%	1	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
<b>Zone 2</b>																
Asda, Ring Road, Coleraine, BT52 1QP	1.2%	6	0.0%	0	6.0%	5	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Bushmills Meat Centre, Main Street, Bushmills, BT57 8QB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Centra Store (Moran's), Dunhill Road, Coleraine, BT51 3QJ	1.7%	8	0.0%	0	7.0%	6	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Centra Store, Main Street, Bushmills, BT57 8QA	0.4%	2	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chestnutt's Farm, Ballybogey Road, Portrush, BT56 8NE	0.1%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Lower Main Street,	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Bushmills, BT57 8QA								
Costcutter, Main Street, Castlerock, BT51 4RA	0.1%	1	0.0%	0	0.6%	1	0.0%	0
Eurospar (Petrol Station), Millburn Road, Coleraine, BT52 1QY	1.0%	5	0.0%	0	5.2%	5	0.0%	0
Eurospar, Coleraine Road, Hillcrest, Portrush, BT56 8HN	1.0%	5	0.8%	0	4.6%	4	0.0%	0
Eurospar, Knocklynn Mountsandel, Sandel Local Centre, Knocklynn Road, Coleraine, BT52 1WT	0.8%	4	0.0%	0	4.3%	4	0.0%	0
Eurospar, Main Street, Garvagh, BT51 5AA	0.8%	4	0.8%	0	3.9%	4	0.0%	0
Kenny's Food Fare, Kilrea Service Station, Garvagh Road, Kilrea, BT51 5QP	0.1%	1	0.0%	0	0.6%	1	0.0%	0
Lidl, Glenmanus Road, Portrush, BT56 8HN	0.4%	2	0.0%	0	1.9%	2	0.0%	0
Lidl, Riverside Retail Park, Coleraine, BT51 3QQ	0.9%	4	0.0%	0	0.0%	0	2.7%	2
Local shops, Coleraine Town Centre	0.1%	0	0.8%	0	0.0%	0	0.0%	0
Mace (Stevenson's), Bridge Street, Kilrea, BT51 5RS	0.1%	1	0.0%	0	0.6%	1	0.0%	0
Marks & Spencer (M&S Foodhall), Riverside Retail Park, Coleraine, BT51 3AW	1.4%	7	0.0%	0	3.6%	3	3.7%	2
McCotter Gusty, Drumagardner Road, Kilrea, BT51 5TF	0.5%	3	0.0%	0	2.8%	3	0.0%	0
Sainsbury's Superstore, Riverside Retail Park, Coleraine, BT51 3QQ	0.1%	1	0.0%	0	0.6%	1	0.0%	0
Spar (Maxol Service Station), Bushmills Road, Portrush, BT56 8JG	0.4%	2	0.0%	0	0.6%	1	1.8%	1
Spar Harpurs Hill, Ballycastle Road / Newmills Road, Coleraine, BT52 2JB	2.1%	10	0.0%	0	11.0%	10	0.0%	0
Spar, Castlerock Road, Coleraine, BT51 3HP	1.1%	5	0.0%	0	5.6%	5	0.0%	0
Spar, Coleraine Road, Portstewart, BT55 7HP	0.8%	4	0.0%	0	4.2%	4	0.0%	0
Spar, Elmwood Park, Bushmills, BT57 8QT	1.7%	8	0.0%	0	8.3%	8	0.6%	0
Spar, Mountfield Drive, Mountsandel, Coleraine, BT52 1TW	0.2%	1	0.0%	0	1.3%	1	0.0%	0
Spar, Mussenden Road, Castlerock, Coleraine, BT51 4TX	0.1%	1	0.0%	0	0.6%	1	0.0%	0
Supervalu, Main Street, Garvagh, BT51 5AD	1.2%	6	0.0%	0	6.1%	6	0.0%	0
Supervalu, Station Road, Portstewart, BT55 7PU	0.4%	2	0.0%	0	1.9%	2	0.0%	0
Tesco Superstore, Bannfield Road, Coleraine, BT52 1HU	0.7%	3	0.0%	0	3.6%	3	0.0%	0
Tesco Superstore, Coleraine Road, Portstewart, BT55 7PL	1.0%	5	0.0%	0	4.1%	4	0.0%	0
Vivo Shop, Ringrash Road, Macosquin, Coleraine, BT51 4LH	0.1%	1	0.0%	0	0.6%	1	0.0%	0
<b>Zone 3</b>								
Brooklands Nearby, Balnamore Road, Balnamore, Ballymoney, BT53 7PT	0.5%	2	0.0%	0	0.0%	0	3.4%	2

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7								
Centra Store, Carnlough Road, Dervock, BT53 8BD	0.2%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costcutter, Bridge Road, Dunloy, Ballymena, BT44 9AN	0.2%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Eurospar (Fullan's FoodHall), Main Street, Portglenone, BT44 8HR	0.3%	2	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0
Eurospar (Moore's of Cloughmills), Main Street, Cloughmills, BT44 9LF	0.5%	2	0.0%	0	0.0%	0	3.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Eurospar, John Street, Ballymoney, BT53 6DS	2.3%	11	0.0%	0	0.6%	1	16.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Eurospar, Main Street, Rasharkin, BT44 8PU	0.4%	2	0.0%	0	0.0%	0	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kelly's Mace, Main Street, Dunloy, BT44 9AA	0.3%	1	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Meeting House Street, Ballymoney, BT53 6JN	0.4%	2	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Ballymoney Town Centre	0.1%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Portglenone Town Centre	0.1%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mace, Main Street, Armoy, BT53 8RF	0.3%	1	0.0%	0	0.0%	0	1.8%	1	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Nisa Local, Ballybogey Road, Ballybogey, Ballymoney, BT53 6PD	0.4%	2	0.0%	0	0.0%	0	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Main Street, Stranocum, Ballymoney, BT53 8PE	0.2%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Milltown Road, Ballymoney, BT53 6LF	1.5%	7	0.0%	0	0.0%	0	10.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Queen Street, Ballymoney, BT53 6JD	0.4%	2	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Route Service Station, Ballybogey Road, Ballymoney, BT53 6QD	0.8%	4	0.0%	0	2.1%	2	3.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Supervalu (McCool's), Ballymena Road, Ballymoney, BT53 7AB	1.3%	6	0.0%	0	0.0%	0	9.3%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Castle Street, Ballymoney, BT53 6JT	0.8%	4	0.0%	0	0.0%	0	6.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Bakery, Main Street, Dunloy, BT44 9AA	0.1%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
<b>Zone 4</b>																
Co-op, The Diamond, Ballycastle, BT54 6AW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Costcutter (Kearney's), Main Street, Glenariffe, Ballymena, BT44 0QR	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0	0.0%	0
Costcutter, A2, Cushendall, Ballymena, BT44 0NB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Costcutter, Main Street, Cushendun, BT44 0PH	0.2%	1	0.0%	0	0.0%	0	0.0%	0	4.4%	1	0.0%	0	0.0%	0	0.0%	0
D Kearney Flesher Butchers, Mill Street, Cushendall, BT44 0RP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0
Eurospar, Coast Road, Cushendall, BT44 0RU	0.7%	3	0.0%	0	0.0%	0	0.0%	0	14.2%	3	0.6%	0	0.0%	0	0.0%	0
Eurospar, Ramoan Road, Ballycastle, BT54 6EG	1.0%	5	0.0%	0	0.0%	0	3.7%	2	10.8%	2	0.0%	0	0.0%	0	0.0%	0
Lidl, Larne Link Road, Ballymena, BT44 0BD	0.5%	2	0.0%	0	0.0%	0	2.0%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Local shops, Carnlough Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0	0.0%	0
Mace, High Street, Carnlough, BT44 0EP	0.4%	2	0.0%	0	0.0%	0	0.0%	0	10.7%	2	0.0%	0	0.0%	0	0.0%	0
McKay Family Butchers Ballycastle, Ann Street, Ballycastle, BT54 6AA	0.1%	1	0.0%	0	0.0%	0	0.0%	0	3.5%	1	0.0%	0	0.0%	0	0.0%	0
McLister's Ballycastle, Ann	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7										
Street, Ballycastle, BT54 6AA																		
Spar, Castle Street, Ballycastle, BT54 6AR	0.2%	1	0.0%	0	0.0%	0	0.6%	0	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Harbour Road, Carnlough, BT44 0EU	1.2%	6	0.0%	0	0.0%	0	0.0%	0	28.3%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Moyle Road, Ballycastle, BT54 6LG	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, North Street, Ballycastle, BT54 6BN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wilson Stores, Toberwine Street, Glenarm, BT44 0AP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
<b>Zone 5</b>																		
Donnelly's Of Rathkenny, Cushendall Road, Rathkenny, BT43 6QE	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0
Eurospar, Doury Road, Ballymena, BT43 6JA	1.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.8%	6	0.0%	0	0.0%	0	0.0%	0
Eurospar, Main Street, Cullybackey, BT42 1BW	1.8%	9	0.0%	0	0.0%	0	4.8%	3	0.0%	0	9.4%	6	0.0%	0	0.0%	0	0.0%	0
Iceland, High Street, Ballymena, BT43 6DT	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0	0.0%	0	0.0%	0
Local shops, Ballymena Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Broughshane Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer (M&S Store), The Fairhill Shopping Centre, Ballymena, BT43 6UG	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.7%	0	5.0%	3	0.0%	0	0.0%	0	0.0%	0
McAtamneys, Fenaghy Road, Galgorm Parks, Ballymena, BT42 1GQ	0.1%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nisa Extra, Cullybackey Road, Ballymena, BT43 5JH	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0
Nisa Local, Glenhugh Road, Ahoghill, Ballymena, BT42 1LB	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Robinsons Supermarket, Cullybackey Road, Ballymena, BT43 5JH	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Dreen Road, Cullybackey, BT42 1EB	0.4%	2	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Dunclug Shopping Centre, Ballymena, BT43 6SA	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0	0.0%	0	0.0%	0
Spar, Fenaghy Road, Galgorm, Ballymena, BT42 1HW	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Frys Road, Ballymena, BT43 7EP	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Galgorm Road, Ahoghill, Ballymena, BT42 1HY	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Spar, Glenravel Road, Martinstown, Ballymena, BT43 6QQ	1.1%	5	0.0%	0	0.0%	0	0.0%	0	0.7%	0	8.9%	5	0.0%	0	0.0%	0	0.0%	0
Spar, Grove Road, Ballymena, BT43 6UB	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Raceview Road, Broughshane, BT42 4JL	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Ballymoney Road, Ballymena, BT43 5BZ	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0
Vivo Shop (McNeills), Main Street, Broughshane, BT42 4JW	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	3	0.0%	0	0.0%	0	0.0%	0
<b>Zone 6</b>																		
Centra Store (Bradley's), Coleraine Road, Maghera, BT46 5AA	1.1%	5	0.0%	0	2.8%	3	0.0%	0	0.0%	0	0.0%	0	4.7%	3	0.0%	0	0.0%	0
Centra Store (Clare's) Main	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Street, Tobermore, BT45 5PP								
Crawfords Express (Petrol Station), Church Street, Maghera, BT46 5EA	0.2%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 2.1%	1 0.0%
Crawfords, Main Street, Maghera, BT46 5AE	0.9%	4 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 7.5%	4 0.0%
Ditty's Bakery, Main Street, Castledawson, BT45 8AB	0.1%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.7%	0 0.0%
Eurospar, Magherafelt Road, Moneymore, BT45 7UL	0.5%	3 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 4.6%	3 0.0%
Eurospar, Main Street, Maghera, BT46 5AB	0.7%	3 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 5.7%	3 0.0%
Eurospar, St Patricks Street, Draperstown, BT45 7AJ	1.4%	7 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 12.1%	7 0.0%
JC Stewart Grocers, Union Road, Magherafelt, BT45 5DF	0.3%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 2.4%	1 0.0%
Local shops, Bellaghy Village Centre	0.2%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 2.1%	1 0.0%
Local shops, Gortin Village Centre	0.2%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 1.5%	1 0.0%
Local shops, Magherafelt Town Centre	0.1%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.7%	0 0.0%
Local shops, Swatragh Village Centre	0.1%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.7%	0 0.0%
Mace, Moneysharvan Road, Swatragh, BT46 5PY	0.4%	2 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 3.1%	2 0.0%
Nisa Local (Muldoons) William Street, Bellaghy, BT45 8HZ	0.3%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 2.2%	1 0.0%
Spar (Grahams), Main Street, Bellaghy, BT45 8HS	0.3%	2 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 2.9%	2 0.0%
Spar (Kelly's), Coleraine Road, Maghera, BT46 5BN	0.2%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 1.5%	1 0.0%
Spar, Rainey Street, Magherafelt, BT45 5DA	0.1%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.7%	0 0.0%
Spar, Tobermore Road, Magherafelt, BT45 5PN	0.2%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 2.1%	1 0.0%
Spar, Union Road, Magherafelt, BT45 5ED	0.1%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.7%	0 0.0%
Today's Local (Pinkerton's), Main Street, Plumbridge, BT79 8AA	0.3%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 2.4%	1 0.0%
Vivo Shop (Kelly's), Magherafelt Road, Castledawson, BT45 8AG	0.2%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 1.5%	1 0.0%
<b>Zone 7</b>								
Eurospar, Clooney Road, Greysteel, BT47 3DY	0.2%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.7%
Eurospar, Creggan Road, Hatfield, Londonderry, BT48 0JJ	0.9%	5 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 3.3%
Eurospar, Rosstowney Park, Londonderry, BT47 5NR	0.8%	4 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 2.7%
Eurospar, Trench Road, Londonderry, BT47 2TD	1.6%	7 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 5.5%
Iceland, Foyleside Shopping Centre, Londonderry, BT48 6XY	1.5%	7 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 5.3%
Lidl, Buncrana Road / Springtown Road, Londonderry, BT48 0LY	0.6%	3 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 2.2%
Local shops, Londonderry City Centre	0.9%	4 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 3.1%
Marks & Spencer (M&S Simply Food), Crescent Link Retail Park, Londonderry, BT47 6SA	1.9%	9 0.8%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 6.3%
McKeown's Day Today, Lisnaragh Road, Donemana, BT82 0QL	0.4%	2 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 1.4%
Nisa Local (Garden City)	0.2%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.7%

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7								
Stores), Garden City, Londonderry, BT48 7SN																
Sainsbury's Superstore, Strand Road, Londonderry, BT48 7TL	4.0%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.9%	19				
Spar, Ballynagard Road, Londonderry, BT48 8JR	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1				
Spar, Belt Road, Altnagelvin, BT47 2LW	1.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	8				
Spar, Berryhill Road, Artigarvan, BT82 0HN	2.7%	13	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	9.3%	13		
Spar, Church Brae, Drumahoe, Londonderry, BT47 3QG	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1		
Spar, Glenshane Road, Drumahoe, BT47 3SF	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1		
Spar, Main Street, Eglinton, BT47 3AA	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1		
Supervalu (Long's), Blackburn Crescent, Waterside, Londonderry, BT47 5QG	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1		
Supervalu (Long's), Duncastle Road, Newbuildings, Londonderry, BT47 2SF	1.3%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	6		
Supervalu, Greenhaw Road, Londonderry, BT48 7RZ	0.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	4		
Supervalu, Main Street, Eglinton, BT47 3PQ	1.5%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	7		
Supervalu, Strand Road, Londonderry, BT48 7PW	1.4%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	7		
Tesco Express, Crescent Link Retail Park, Londonderry, BT47 6SA	1.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	6		
Tesco Superstore, Lisnagelvin Shopping Centre, Londonderry, BT47 6DA	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	4		
Tesco Superstore, Quayside Centre, Strand Road, Londonderry, BT48 7PX	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1		
The Range, Buncrana Road, Londonderry, BT48 8QN	0.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	4		
<b>Outside Survey Area</b>																
Asda, Redlands Road, Larne, BT40 1AX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0		
B&M Store, Laharna Retail Park, Larne, BT40 1HR	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0		
Centra Store, Antrim Road, Ballymena, BT42 2BJ	1.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.4%	6	0.0%	0	0.0%	0
Centra Store, Castledawson Road, Magherafelt, BT45 6PA	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.5%	4	0.0%	0
Centra Store, Main Street, Kells, BT42 3JH	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Co-op, Rosetta Road, Belfast, BT6 0LR	0.2%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crosskeys Meats, Ross Park, Tullaghgarley, Ballymena, BT42 2LD	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Home Bargains, Queen Street, Ballymena, BT42 2BG	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Iceland, Meadow Lane Shopping Centre, Magherafelt, BT45 6PR	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0
Iceland, Point Street, Larne, BT40 1HU	0.1%	1	0.0%	0	0.0%	0	0.0%	0	3.1%	1	0.0%	0	0.0%	0	0.0%	0
Kenny's Food Fare, Moneymore Road, Highfield, Magherafelt, BT45 6HF	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0
Lidl, Castledawson Road,	0.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.7%	4	0.0%	0

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Magherafelt, BT45 6PA								
Lidl, Circular Road, Larne, BT40 1JS	0.1%	1	0.0%	0	0.0%	0	0.0%	1
Lidl, Strabane Shopping Park, Bradley Way, Strabane, BT82 8EW	0.2%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Antrim Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0
McNicholl's, Ballyronan Road, Magherafelt, BT45 6EN	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Nisa Local, Antrim Road, Lurgan, BT67 9BW	0.3%	2	0.0%	0	0.0%	0	2.7%	2
Poundland, Meadowlane Shopping Centre, Magherafelt, BT45 6PR	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Braidwater Retail Park, Ballymena, BT42 3AG	0.6%	3	0.0%	0	0.0%	0	5.1%	3
Spar, Gortin Road, Omagh, BT79 7DA	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Hanover Square, Coagh, BT80 0EF	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Larne Road, Ballymena, BT42 3HA	0.2%	1	0.0%	0	0.0%	0	1.8%	1
Spar, The Rosses, Tullygarley Road, Ballymena, BT42 2HZ	0.3%	2	0.0%	0	0.0%	0	2.7%	2
Tesco Superstore, Ballyronan Road, Magherafelt, BT45 6BP	0.6%	3	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Larne Road, Ballymena, BT42 3HB	1.5%	7	0.0%	0	0.0%	0	7.7%	7
Vivo Shop (Flanagan's), Urney Road, Clady, BT82 9RP	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:	478	51	91	65	19	59	55	136
Sample:	493	69	73	74	67	72	71	67

**Meanscore: [Number of visits per week]****Q15 How often do you make 'top up' shopping trips to STORE MENTIONED AT Q14?**

Those that do top-up shopping at Q13 excluding those who said '(Don't know / can't remember)' at Q14

Daily	11.2%	55	16.4%	9	12.6%	11	6.0%	4	21.3%	4	6.4%	4	10.0%	6	11.8%	17
At least two times a week	44.5%	218	41.4%	22	54.1%	49	52.1%	34	50.7%	10	55.4%	33	51.9%	29	27.9%	41
At least once a week	33.7%	165	39.9%	21	23.9%	22	31.8%	21	17.1%	3	30.6%	18	33.0%	18	42.3%	62
At least once a fortnight	6.2%	30	0.8%	0	5.4%	5	6.0%	4	4.4%	1	4.6%	3	1.5%	1	11.4%	17
At least once a month	1.3%	6	0.8%	0	0.0%	0	1.8%	1	1.3%	0	1.2%	1	2.1%	1	1.8%	3
At least every two months	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Less often	0.9%	5	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	4
Have only visited once	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	2.0%	10	0.0%	0	3.3%	3	2.4%	2	4.6%	1	1.8%	1	1.5%	1	1.8%	3
Mean:		2.09		2.38		2.32		1.86		2.83		1.93		2.11		1.91
Weighted base:		490		53		91		66		20		59		55		146
Sample:		500		70		73		75		69		72		71		70

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
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**Meanscore: [£]****Q16 How much on average does your household normally spend on top up shopping in a week?**

Those that do top-up shopping at Q13 excluding those who said '(Don't know / can't remember)' at Q14

£1 - £5	4.8%	23	2.3%	1	7.2%	7	3.8%	2	1.3%	0	1.2%	1	0.7%	0	8.1%	12
£6 - £10	9.7%	47	13.8%	7	6.6%	6	13.7%	9	13.9%	3	12.0%	7	11.7%	6	5.9%	9
£11 - £15	14.4%	71	6.6%	3	13.3%	12	10.1%	7	13.7%	3	8.0%	5	15.1%	8	22.5%	33
£16 - £20	12.7%	62	18.5%	10	11.4%	10	13.0%	9	11.3%	2	20.8%	12	10.7%	6	9.0%	13
£21 - £25	9.5%	46	8.7%	5	5.4%	5	10.4%	7	4.5%	1	10.0%	6	13.0%	7	11.0%	16
£26 - £30	9.3%	45	8.4%	4	11.5%	10	13.2%	9	9.1%	2	4.0%	2	9.9%	5	8.4%	12
£31 - £35	4.0%	19	7.5%	4	5.2%	5	4.3%	3	2.5%	1	1.2%	1	2.9%	2	3.5%	5
£36 - £40	6.6%	33	7.7%	4	8.8%	8	4.5%	3	8.2%	2	6.6%	4	9.0%	5	4.8%	7
£41 - £45	2.7%	13	0.8%	0	2.5%	2	3.3%	2	0.0%	0	0.6%	0	0.0%	0	5.6%	8
£46 - £50	8.7%	43	10.9%	6	8.9%	8	6.4%	4	0.6%	0	8.9%	5	5.5%	3	11.2%	16
£51 - £60	1.5%	7	0.8%	0	5.4%	5	0.0%	0	0.0%	0	0.6%	0	3.1%	2	0.0%	0
£61 - £70	0.5%	3	0.0%	0	0.6%	1	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
£71 - £80	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	0	1.2%	1	0.0%	0	0.0%	0
£81 - £90	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£91 - £100	2.8%	14	0.0%	0	4.7%	4	2.0%	1	6.0%	1	4.0%	2	3.1%	2	2.0%	3
£101 - £110	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£111 - £120	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£121 - £130	0.7%	3	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0	2.0%	3
£131 - £140	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£141 - £150	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£151 - £175	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£176 - £200	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	2.4%	1	0.0%	0
£201 - £225	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£226 - £250	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£251 - £275	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£276 - £300	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£301+	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	10.3%	50	10.8%	6	6.5%	6	13.6%	9	24.9%	5	18.4%	11	13.2%	7	4.5%	7
(Refused)	1.1%	6	3.4%	2	2.1%	2	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.6%	1
Mean:		29.56		26.42		31.86		26.08		32.10		30.69		32.58		28.92
Weighted base:		490		53		91		66		20		59		55		146
Sample:		500		70		73		75		69		72		71		70

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
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**Q17 Where did you last buy clothing or footwear goods?**

Excl. Nulls &amp; SFT

**Zone 1**

Limavady Town Centre	4.9%	22	30.8%	16	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	5
Tesco Superstore, Main Street, Limavady, BT49 0ET	0.1%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

**Zone 2**

Asda, Ring Road, Coleraine, BT52 1QP	0.4%	2	0.0%	0	0.0%	0	3.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Castlerock Garden Centre, Mussenden Road, Castlerock, Coleraine, BT51 4TX	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0
Coleraine Town Centre	12.6%	57	13.2%	7	49.2%	37	15.3%	8	3.5%	1	0.0%	0	1.5%	1	2.5%	4
Kilrea Village Centre	0.2%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Portrush Town Centre	0.3%	2	0.8%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Portstewart Town Centre	0.6%	3	0.8%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Riverside Retail Park (& The Jet Centre), Coleraine, BT51 3QQ	4.5%	20	5.8%	3	15.4%	12	7.0%	4	2.8%	0	0.7%	0	2.4%	1	0.0%	0

**Zone 3**

Ballymoney Town Centre	4.3%	19	2.3%	1	7.1%	5	21.3%	11	2.6%	0	0.7%	0	2.2%	1	0.0%	0
Tesco Superstore, Castle Street, Ballymoney, BT53 6JT	0.8%	3	0.0%	0	0.0%	0	6.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0

**Zone 4**

Ballycastle Town Centre	0.3%	1	0.0%	0	0.0%	0	0.8%	0	7.0%	1	0.0%	0	0.0%	0	0.0%	0
Cushendall Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0

**Zone 5**

Ballymena Town Centre	11.4%	52	0.8%	0	0.8%	1	20.3%	10	37.8%	6	49.4%	27	15.0%	8	0.0%	0
Marks & Spencer (M&S Store), The Fairhill Shopping Centre, Ballymena, BT43 6UG	1.9%	9	0.0%	0	4.0%	3	2.4%	1	4.4%	1	6.8%	4	0.0%	0	0.0%	0

**Zone 6**

Draperstown Town Centre	0.5%	2	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2	0.0%	0
Maghera Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0

**Zone 7**

Crescent Link Retail Park, Londonderry, BT47 6SA	3.6%	16	6.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.7%	13
Foyleside Shopping Centre, Orchard Street, Londonderry, BT48 6XY	2.2%	10	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.4%	10
Lidl, Buncrana Road / Springfield Road, Londonderry, BT48 0LY	0.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	4
Lisnagelvin Retail Park, Crescent Road, Londonderry, BT47 2NQ	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Lisnagelvin Shopping Centre, Lisnagelvin Road, Londonderry, BT47 6DF	0.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	4
Londonderry City Centre	14.4%	65	16.4%	9	4.7%	4	6.1%	3	0.9%	0	3.1%	2	0.0%	0	32.1%	48
Marks & Spencer (M&S Store), Foyleside Shopping Centre, Londonderry, BT48 6XY	3.7%	17	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	10.4%	16
Richmond Shopping Centre, Ferryquay Street, Londonderry, BT48 6PE	1.0%	5	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	4
Sainsbury's Superstore, Strand Road, Londonderry, BT48 7TL	0.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	4
Tesco Superstore, Lisnagelvin Shopping Centre, Londonderry, BT47 6DA	2.8%	13	2.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.5%	11
Tesco Superstore, Quayside Centre, Strand Road, Londonderry, BT48 7PX	1.5%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	7
The Range, Buncrana Road, Londonderry, BT48 8QN	0.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	4

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
<b>Outside Survey Area</b>								
Antrim Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Redlands Road, Larne, BT40 1AX	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Ballybofey Town Centre	0.1%	0	0.8%	0	0.0%	0	0.0%	0
Ballyclare Town Centre	0.2%	1	0.0%	0	0.0%	0	2.5%	0
Bath City Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Belfast City Centre	4.0%	18	11.0%	6	5.5%	4	7.2%	4
Braidwater Retail Park, Ballymena, BT42 3AG	3.5%	16	0.0%	0	0.0%	0	8.1%	4
Cookstown Town Centre	1.0%	4	0.0%	0	0.0%	0	0.0%	0
Cork City Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Dunnes Stores, Spillars Place, Irishtown Road, Omagh, BT78 1EY	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Enniskillen Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Laharna Retail Park, Larne, BT40 1HR	0.4%	2	0.0%	0	0.0%	0	11.1%	2
Larne Town Centre	0.1%	0	0.0%	0	0.0%	0	2.5%	0
Lesley Abbeycentre, Longwood Road, Newtownabbey, Belfast, BT37 9UH	0.9%	4	0.0%	0	3.6%	3	0.0%	0
Magherafelt Town Centre	4.1%	18	0.0%	0	0.8%	1	0.0%	0
Moira Village Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Newtownstewart Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Omagh Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0
Orritor Road Retail Park (aka Broadfields Retail Park), Cookstown, BT80 8BH	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Pavilion Retail Park, Railway Street, Strabane, BT82 8EQ	0.2%	1	0.0%	0	0.0%	0	0.0%	0
Rushmers Shopping Centre, Central Way, Craigavon, BT64 1AA	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Sainsbury's Superstore, Braidwater Retail Park, Ballymena, BT42 3AG	0.4%	2	0.0%	0	0.0%	0	0.0%	0
Showgrounds Retail Park, Omagh, BT79 7AQ	0.5%	2	0.0%	0	0.0%	0	0.0%	0
Strabane Town Centre	1.5%	7	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Ballyronan Road, Magherafelt, BT45 6BP	0.5%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Larne Road, Ballymena, BT42 3HB	0.6%	3	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Orritor Road, Cookstown, BT80 8BH	0.3%	1	0.0%	0	0.0%	0	0.0%	0
The Junction Shopping Complex (aka Junction 1), Antrim, BT41 4LL	3.7%	16	4.3%	2	3.4%	3	0.8%	1
Weighted base:	450		53		75		50	
Sample:	479		73		66		65	
							15	
							61	
							54	
							71	
							54	
							73	
							150	
							70	

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7								
<b>Q18 When you go shopping for clothing or footwear, do you link this trip with another activity?</b>																
Not those that said 'Abroad', 'Internet / delivery', '(Don't know / can't remember)' or '(Don't do this type of shopping)' at Q17																
Yes – food shopping	5.6%	25	1.5%	1	12.0%	9	4.3%	2	7.2%	1	6.9%	4	10.8%	6	1.8%	3
Yes – non-food shopping	6.5%	29	5.4%	3	15.6%	12	6.7%	3	3.4%	1	3.9%	2	7.3%	4	3.2%	5
Yes – visiting services such as banks and other financial institutions	2.4%	11	0.0%	0	0.0%	0	0.0%	0	2.6%	0	0.0%	0	0.7%	0	6.8%	10
Yes – leisure activity	3.1%	14	9.4%	5	0.0%	0	0.0%	0	1.7%	0	0.0%	0	0.7%	0	5.7%	8
Yes – travelling to/from work	1.6%	7	5.9%	3	0.8%	1	6.0%	3	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Yes – travelling to/from school/college/university	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes – getting petrol	0.5%	2	0.0%	0	0.8%	1	0.0%	0	2.8%	0	0.0%	0	2.2%	1	0.0%	0
Yes – visiting café / pub / restaurant	14.7%	66	20.7%	11	18.5%	14	17.9%	9	5.1%	1	12.6%	7	9.6%	5	13.3%	20
Yes – visiting family/friends	5.2%	24	12.1%	6	1.6%	1	2.3%	1	5.6%	1	1.3%	1	4.3%	2	7.3%	11
Yes – visiting health service such as doctor, dentist, hospital	2.5%	11	4.2%	2	4.3%	3	0.0%	0	0.9%	0	2.8%	2	2.4%	1	2.0%	3
Yes – visiting other service such as laundrette, hairdresser, recycling	2.5%	11	3.5%	2	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	8
Yes – other activity	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes – window shopping / browsing	2.6%	12	8.2%	4	0.0%	0	5.3%	3	0.9%	0	0.0%	0	0.0%	0	3.0%	5
Yes – going for a walk	0.1%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(No activity)	51.3%	231	28.3%	15	44.9%	34	56.7%	29	66.1%	10	64.0%	35	60.4%	33	51.4%	77
(Don't know / varies)	1.3%	6	0.0%	0	0.0%	0	0.8%	0	3.7%	1	8.5%	5	0.7%	0	0.0%	0
Weighted base:		450		53		75		50		15		54		54		150
Sample:		479		73		66		65		61		71		73		70

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7								
<b>Q19 Where did you last buy books, CDs, DVDs?</b>																
<i>Excl. Nulls &amp; SFT</i>																
<b>Zone 1</b>																
Dungiven Town Centre	0.6%	1	5.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Limavady Town Centre	2.6%	6	21.2%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Tesco Superstore, Main Street, Limavady, BT49 0ET	2.9%	6	24.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
<b>Zone 2</b>																
Asda, Ring Road, Coleraine, BT52 1QP	2.2%	5	0.0%	0	8.1%	3	7.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coleraine Town Centre	14.1%	30	14.4%	3	53.4%	20	16.7%	4	4.7%	0	1.4%	0	6.6%	2	1.2%	1
Garvagh Village Centre	0.3%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kilrea Village Centre	0.7%	2	0.0%	0	0.0%	0	1.7%	0	0.0%	0	0.0%	0	4.9%	1	0.0%	0
Portrush Town Centre	0.3%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Riverside Retail Park (& The Jet Centre), Coleraine, BT51 3QQ	2.4%	5	0.0%	0	13.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Riverside Retail Park, Coleraine, BT51 3QQ	0.9%	2	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0	4.9%	1	0.0%	0
Tesco Superstore, Bannfield Road, Coleraine, BT52 1HU	1.1%	2	0.0%	0	6.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
<b>Zone 3</b>																
Ballymoney Town Centre	2.3%	5	0.0%	0	0.0%	0	19.6%	5	0.0%	0	0.0%	0	1.7%	0	0.0%	0
Dervock Village Centre	0.2%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Portglenone Town Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0
Tesco Superstore, Castle Street, Ballymoney, BT53 6JT	2.4%	5	0.0%	0	4.5%	2	14.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
<b>Zone 4</b>																
Ballycastle Town Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	16.1%	1	0.0%	0	0.0%	0	0.0%	0
<b>Zone 5</b>																
Ballymena Town Centre	11.6%	25	0.0%	0	1.6%	1	28.1%	7	43.3%	2	50.5%	13	10.2%	2	0.0%	0
Broughshane Village Centre	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0
<b>Zone 6</b>																
Draperstown Town Centre	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	1	0.0%	0
Gortin Village Centre	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0
<b>Zone 7</b>																
Crescent Link Retail Park, Londonderry, BT47 6SA	2.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	4
Eglington Village Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Foyleside Shopping Centre, Orchard Street, Londonderry, BT48 6XY	2.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.8%	5
Londonderry City Centre	20.8%	45	32.7%	7	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0	48.3%	37
Marks & Spencer (M&S Store), Foyleside Shopping Centre, Londonderry, BT48 6XY	3.9%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.9%	8
Northside Village Shopping Centre, Glengalliaigh Road, Londonderry, BT48 8NN	1.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	4
Richmond Shopping Centre, Ferryquay Street, Londonderry, BT48 6PE	2.2%	5	1.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	4
Shantallow Local Centre, Londonderry	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Tesco Superstore, Quayside Centre, Strand Road, Londonderry, BT48 7PX	2.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	4
<b>Outside Survey Area</b>																
Asda, Branch Road, Strabane, BT82 8EQ	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Bangor City Centre	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0
Belfast City Centre	3.0%	6	0.0%	0	5.0%	2	7.2%	2	0.0%	0	6.2%	2	5.1%	1	0.0%	0
Belfast International Airport, Airport Road, Crumlin, BT29 4AB	1.8%	4	0.0%	0	4.5%	2	0.0%	0	0.0%	0	0.0%	0	4.9%	1	1.2%	1
Braidwater Retail Park, Ballymena, BT42 3AG	3.3%	7	0.0%	0	0.0%	0	0.0%	0	17.8%	1	23.3%	6	0.0%	0	0.0%	0

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Cookstown Town Centre	1.5%	3 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 13.4%	3 0.0%
Laharna Retail Park, Larne, BT40 1HR	0.1%	0 0.0%	0 0.0%	0 0.0%	0 2.3%	0 0.0%	0 0.0%	0 0.0%
Larne Town Centre	1.2%	2 0.0%	0 0.0%	0 0.0%	0 15.8%	1 6.2%	2 0.0%	0 0.0%
Magherafelt Town Centre	3.5%	8 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 31.7%	8 0.0%
Omagh Town Centre	0.4%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 3.4%	1 0.0%
Strabane Town Centre	1.2%	3 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 3.5%
Tesco Superstore, Larne Road, Ballymena, BT42 3HB	0.7%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 5.6%	1 0.0%	0 0.0%
The Junction Shopping Complex (aka Junction 1), Antrim, BT41 4LL	0.5%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 4.0%	1 0.0%	0 0.0%
York City Centre	0.2%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 1.7%	0 0.0%
Weighted base:	215	22	37	23	6	26	24	76
Sample:	229	33	39	31	22	34	38	32

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7								
<b>Q20 Where did you last buy small household goods such as home furnishings, jewellery, glass and china items?</b>																
<i>Excl. Nulls &amp; SFT</i>																
<b>Zone 1</b>																
Home Bargains, Catherine Street, Limavady, BT49 9DA	1.1%	4	8.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Main Street, Limavady, BT49 0EP	0.4%	1	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Limavady Town Centre Seacoast Nurseries, Seacoast Road, Limavady, BT49 9DW	3.3% 0.5%	11 2	15.2% 4.1%	7 0.0%	0 0.0%	0										
Tesco Superstore, Main Street, Limavady, BT49 0ET	1.7%	6	13.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
<b>Zone 2</b>																
Asda, Ring Road, Coleraine, BT52 1QP	0.7%	3	0.0%	0	4.3%	2	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0
Coleraine Town Centre	5.7%	20	2.7%	1	16.4%	9	7.0%	2	3.7%	0	0.0%	0	4.4%	2	4.0%	4
Portrush Town Centre	1.1%	4	0.0%	0	5.6%	3	1.1%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0
Portstewart Town Centre	1.4%	5	0.0%	0	4.1%	2	4.4%	2	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Riverside Retail Park (& The Jet Centre), Coleraine, BT51 3QQ	15.6%	54	18.3%	8	53.0%	30	28.0%	10	9.0%	1	0.0%	0	10.6%	5	0.0%	0
Sainsbury's Superstore, Riverside Retail Park, Coleraine, BT51 3QQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0
<b>Zone 3</b>																
Ballymoney Town Centre	2.7%	9	0.0%	0	3.0%	2	19.4%	7	0.0%	0	0.8%	0	0.8%	0	0.0%	0
Basil Knipe Electrics, Ballymena Road, Ballymoney, BT53 7EX	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Meeting House Street, Ballymoney, BT53 6JN	0.1%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Portglenone Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0
Tesco Superstore, Castle Street, Ballymoney, BT53 6JT	0.9%	3	0.0%	0	3.0%	2	3.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
<b>Zone 4</b>																
Ballycastle Town Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	12.6%	1	0.0%	0	0.0%	0	0.0%	0
Glenarm Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0
<b>Zone 5</b>																
Ahoghill Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Ballymena Town Centre	6.3%	22	0.0%	0	0.0%	0	14.7%	5	22.4%	2	26.8%	12	5.0%	2	0.0%	0
Marks & Spencer (M&S Store), The Fairhill Shopping Centre, Ballymena, BT43 6UG	0.6%	2	0.0%	0	0.0%	0	3.6%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0
<b>Zone 6</b>																
Home Bargains, Station Road, Magherafelt, BT45 5EY	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1	0.0%	0
Maghera Town Centre	2.0%	7	0.0%	0	4.3%	2	3.6%	1	0.0%	0	0.8%	0	5.9%	3	0.0%	0
<b>Zone 7</b>																
Crescent Link Retail Park, Londonderry, BT47 6SA	6.1%	21	4.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.0%	19
Faustina Retail Park, Buncrana Road, Londonderry, BT48 8TH	1.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	5
Foyleside Shopping Centre, Orchard Street, Londonderry, BT48 6XY	2.7%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.9%	9
Glenkeen Furnishings, Glendermott Road, Londonderry, BT47 6BG	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Harry Corry, Foyle View, Strand Road, Londonderry, BT48 7PU	0.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	3
Home Bargains, Foyle View, Strand Road, Londonderry, BT48 7PU	1.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	4
Lisnagelvin Retail Park, Crescent Road,	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7								
Londonderry, BT47 2NQ																
Lisnagelvin Shopping Centre, Lisnagelvin Road, Londonderry, BT47 6DF	1.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.4%	7				
Londonderry City Centre	8.3%	29	15.7%	7	0.0%	0	0.0%	0	0.0%	0	20.3%	21				
Marks & Spencer (M&S Store), Foyleside Shopping Centre, Londonderry, BT48 6XY	1.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4				
Pennyburn Industrial Estate, Buncrana Road, Londonderry, BT48 0LU	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1				
Quayside Shopping Centre, Strand Road, Londonderry, BT48 7PX	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1				
Tesco Superstore, Quayside Centre, Strand Road, Londonderry, BT48 7PX	0.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	3				
The Range, Buncrana Road, Londonderry, BT48 8QN	1.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	4				
<b>Outside Survey Area</b>																
Antrim Town Centre	1.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4				
Asda, Branch Road, Strabane, BT82 8EQ	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2				
Ballybofey Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1				
Balmoral Plaza, Boucher Road, Belfast, BT12 6HR	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0				
Belfast City Centre	2.4%	8	4.0%	2	3.3%	2	1.1%	0	3.6%	0	2.6%	1	5.5%	3	0.0%	0
Bradley's Furniture, Aughrim Road, Magherafelt, BT45 6JY	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0		
Braidwater Retail Park, Ballymena, BT42 3AG	6.3%	22	0.0%	0	0.0%	0	8.5%	3	29.3%	3	35.1%	16	0.0%	0	0.0%	0
Buncrana Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1		
Cookstown Town Centre	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	3	0.0%	0
Dunelm, Larne Road, Ballymena, BT42 3HA	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	0	1.6%	1	0.0%	0	0.0%	0
Dungannon Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0
IKEA Belfast, Holywood Exchange, Airport Road West, Belfast, BT3 9EJ	1.3%	5	3.8%	2	0.0%	0	0.0%	0	0.0%	0	3.7%	2	2.4%	1	0.0%	0
Laharna Retail Park, Larne, BT40 1HR	0.3%	1	0.0%	0	0.0%	0	0.0%	0	10.6%	1	0.0%	0	0.0%	0	0.0%	0
Larne Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	0	2.3%	1	0.0%	0	0.0%	0
Lidl, Castledawson Road, Magherafelt, BT45 6PA	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Magherafelt Town Centre	5.8%	20	0.0%	0	0.0%	0	3.6%	1	0.0%	0	0.0%	0	38.7%	19	0.0%	0
Newtownards Town Centre	0.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	3
Newtownstewart Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0
Omagh Town Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1	0.0%	0
Portadown Town Centre	0.5%	2	4.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Braidwater Retail Park, Ballymena, BT42 3AG	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Strabane Town Centre	1.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	4		
Tesco Superstore, Ballyronan Road, Magherafelt, BT45 6BP	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0		
Tesco Superstore, Larne Road, Ballymena, BT42 3HB	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.6%	3	0.0%	0	0.0%	0
The Bridge Retail Park, Larne Road, Ballymena, BT42 3HA	1.5%	5	0.0%	0	1.0%	1	0.0%	0	2.5%	0	6.9%	3	2.5%	1	0.0%	0
The Junction Shopping Complex (aka Junction 1), Antrim, BT41 4LL	1.8%	6	4.1%	2	0.0%	0	0.0%	0	0.0%	0	5.9%	3	3.7%	2	0.0%	0
Weighted base:	346		45		57		35		10		45		49		106	
Sample:	350		54		48		43		45		53		60		47	

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
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**Q21 Where did you last buy goods such as toys, games, bicycles and recreational goods?**

Excl. Nulls &amp; SFT

**Zone 1**

Claudy Village Centre	0.5%	1	5.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Limavady Town Centre	1.0%	3	10.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Main Street, Limavady, BT49 0ET	1.3%	3	9.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1

**Zone 2**

Asda, Ring Road, Coleraine, BT52 1QP	1.5%	4	1.6%	0	6.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coleraine Town Centre	8.6%	22	10.4%	3	31.9%	17	9.2%	3	1.5%	0	0.0%	0	0.0%	0
Lidl, Riverside Retail Park, Coleraine, BT51 3QQ	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0
Portrush Town Centre	0.2%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Riverside Retail Park (& The Jet Centre), Coleraine, BT51 3QQ	10.7%	28	10.7%	3	40.9%	22	9.7%	3	3.0%	0	0.0%	0	1.2%	0

**Zone 3**

Ballymoney Town Centre	4.2%	11	0.0%	0	6.7%	4	24.0%	7	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Castle Street, Ballymoney, BT53 6JT	0.5%	1	0.0%	0	0.0%	0	4.2%	1	0.0%	0	0.0%	0	0.0%	0

**Zone 4**

Ballycastle Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	0	0.0%	0	0.0%	0
Lidl, Larne Link Road, Ballymena, BT44 0BD	0.7%	2	7.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

**Zone 5**

Ballymena Town Centre	10.3%	27	0.0%	0	9.5%	5	16.0%	5	26.6%	2	29.6%	10	14.0%	5
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**Zone 6**

Castledawson Town Centre	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	1	0.0%	0
Home Bargains, Station Road, Magherafelt, BT45 5EY	0.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	2	0.0%	0

**Zone 7**

Maghera Town Centre	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	2	0.0%	0
Crescent Link Retail Park, Londonderry, BT47 6SA	6.1%	16	7.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.5%	14
Foyleside Shopping Centre, Orchard Street, Londonderry, BT48 6XY	2.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.8%	5
Home Bargains, Foyle View, Strand Road, Londonderry, BT48 7PU	1.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	4

Londonderry City Centre	7.9%	21	20.6%	5	0.0%	0	4.2%	1	0.0%	0	0.0%	0	17.0%	13
Maydown Village Centre	0.2%	0	1.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Strand Road, Londonderry, BT48 7TL	2.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.8%	5

Smyths, Strand Road, Londonderry, BT48 7PB	6.3%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.6%	16
Tesco Superstore, Quayside Centre, Strand Road, Londonderry, BT48 7PX	1.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	4
The Range, Buncrana Road, Londonderry, BT48 8QN	1.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	4

**Outside Survey Area**

Antrim Town Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Asda, Branch Road, Strabane, BT82 8EQ	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Belfast City Centre	0.5%	1	0.0%	0	0.0%	0	0.0%	0	4.3%	0	0.0%	0	0.0%	0
Braintree Retail Park, Ballymena, BT42 3AG	14.5%	38	0.0%	0	3.2%	2	32.8%	10	30.0%	3	65.5%	22	3.6%	1
Cookstown Town Centre	1.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Circular Road, Larne, BT40 3AH	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0
Home Bargains, Queen Street, Ballymena, BT42 2BG	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	2	0.0%	0
Laharna Retail Park, Larne, BT40 1HR	0.8%	2	0.0%	0	0.0%	0	0.0%	0	24.3%	2	0.0%	0	0.0%	0
Larne Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	0	0.0%	0	0.0%	0
Lidl, Castledawson Road,	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	2	0.0%	0

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Magherafelt, BT45 6PA								
Magherafelt Town Centre	3.5%	9 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 28.0%	9 0.0%
Orritor Road Retail Park (aka Broadfields Retail Park), Cookstown, BT80 8BH	0.7%	2 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 5.5%	2 0.0%
Station Square Retail Park, Cookstown, BT80 8PA	0.7%	2 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 5.7%	2 0.0%
Strabane Retail Park (aka Lesley Retail Park), Strabane, BT82 8EW	0.4%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 1.2%	1
Strabane Town Centre	3.4%	9 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 5.7%	2 9.1%
The Junction Shopping Complex (aka Junction 1), Antrim, BT41 4LL	1.6%	4 14.6%	4 0.0%	0 0.0%	0 0.0%	0 0.0%	0 1.2%	0 0.0%
Weighted base:	260	25	53	31	9	34	33	76
Sample:	215	23	38	32	29	29	33	31

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
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**Q22 Where did you last buy chemist goods (including health and beauty products)?**

Excl. Nulls &amp; SFT

**Zone 1**

Ballykelly Village Centre	0.3%	2	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Claudy Village Centre	0.8%	5	6.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Dungiven Town Centre	0.6%	3	5.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Main Street, Limavady, BT49 0EP	0.6%	3	4.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Limavady Town Centre	5.4%	31	47.6%	29	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2
Spar, Irish Green Street, Limavady, BT49 9BA	0.1%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Main Street, Limavady, BT49 0ET	1.6%	9	11.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2

**Zone 2**

Asda, Ring Road, Coleraine, BT52 1QP	1.4%	8	2.1%	1	4.7%	5	2.5%	2	0.0%	0	0.0%	0	0.0%	0
Bushmills Village Centre	2.2%	13	0.0%	0	10.4%	11	2.3%	2	0.0%	0	0.0%	0	0.0%	0
Clear Pharmacy, Waterside, Coleraine, BT51 3DP	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coast Chemists, Castlerock Road, Coleraine, BT51 3HP	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coleraine Town Centre	9.3%	54	1.3%	1	41.1%	44	5.2%	4	3.9%	1	0.0%	0	3.8%	3
Garvagh Village Centre	0.4%	2	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kilrea Village Centre	0.7%	4	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Riverside Retail Park, Coleraine, BT51 3QQ	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Portrush Town Centre	0.8%	5	0.0%	0	4.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Portstewart Town Centre	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Riverside Retail Park (& The Jet Centre), Coleraine, BT51 3QQ	2.8%	16	0.0%	0	14.7%	16	0.0%	0	0.5%	0	0.0%	0	0.6%	0
Sainsbury's Superstore, Riverside Retail Park, Coleraine, BT51 3QQ	1.2%	7	1.3%	1	5.1%	5	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Bannfield Road, Coleraine, BT52 1HU	1.3%	7	0.0%	0	5.2%	6	1.8%	1	0.5%	0	0.0%	0	0.6%	0
Tesco Superstore, Coleraine Road, Portstewart, BT55 7PL	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0

**Zone 3**

Armagh Village Centre	0.1%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Ballymoney Town Centre	6.2%	36	0.0%	0	3.9%	4	42.7%	31	0.5%	0	0.5%	0	0.6%	0
Cloughmills Village Centre	0.3%	2	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0
Kelly's Mace, Main Street, Dunloy, BT44 9AA	0.1%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Meeting House Street, Ballymoney, BT53 6JN	0.4%	2	0.0%	0	0.0%	0	3.1%	2	0.5%	0	0.0%	0	0.0%	0
Portglenone Town Centre	0.2%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.6%	0
Rasharkin Village Centre	0.1%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Spar, Route Service Station, Ballybogey Road, Ballymoney, BT53 6QD	0.3%	2	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Castle Street, Ballymoney, BT53 6JT	1.8%	11	0.0%	0	0.0%	0	14.6%	11	0.0%	0	0.0%	0	0.0%	0

**Zone 4**

Ballycastle Town Centre	0.5%	3	0.0%	0	0.0%	0	0.0%	0	11.8%	3	0.0%	0	0.0%	0
Carnlough Village Centre	0.7%	4	0.0%	0	0.0%	0	0.0%	0	16.7%	4	0.0%	0	0.0%	0
Cushendall Village Centre	0.6%	4	0.0%	0	0.0%	0	0.0%	0	15.2%	4	0.0%	0	0.0%	0
Eurospar, Ramoan Road, Ballycastle, BT54 6EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0
Lidl, Larne Link Road, Ballymena, BT44 0BD	0.5%	3	2.9%	2	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0

**Zone 5**

Ahoghill Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0	0.0%	0
Ballykeel Pharmacy, Crebilly Road, Ballymena, BT42 4AZ	0.3%	2	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0
Ballymena Town Centre	6.1%	35	0.0%	0	0.0%	0	6.1%	4	12.1%	3	34.1%	24	6.2%	4
Boots Pharmacy, Cushendall	0.3%	2	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Road, Ballymena, BT43 6HB								
Broughshane Village Centre	0.5%	3	0.0%	0	0.0%	0	0.0%	0
Cullybackey Village Centre	0.8%	5	0.0%	0	0.0%	0	5.0%	4
Galgorm Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0
<b>Zone 6</b>								
Bellaghy Village Centre	0.6%	3	0.0%	0	0.0%	0	0.0%	0
Castledawson Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	1
Draperstown Town Centre	0.7%	4	0.0%	0	0.0%	0	0.0%	0
Gortin Village Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Station Road, Magherafelt, BT45 5EY	0.6%	4	0.0%	0	0.0%	0	0.0%	0
Maghera Town Centre	1.1%	7	0.0%	0	0.0%	0	0.0%	0
Moneymore Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Swatragh Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0
<b>Zone 7</b>								
Artigarvan Village Centre	0.5%	3	0.0%	0	0.0%	0	0.0%	0
Bradley's Pharmacy, Northland Road, Springfield, Londonderry, BT48 0LX	0.9%	5	0.0%	0	0.0%	0	0.0%	0
Bradley's Pharmacy, Trench Road, Londonderry, BT47 2DS	0.2%	1	0.0%	0	0.0%	0	0.0%	0
Crescent Link Retail Park, Londonderry, BT47 6SA	5.1%	30	1.9%	1	0.0%	0	0.0%	0
Donemana Village Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0
Dunnes Stores, Springfield Centre, Northland Road, Londonderry, BT48 0PU	0.5%	3	0.0%	0	0.0%	0	0.0%	0
Eglinton Village Centre	1.4%	8	0.0%	0	0.0%	0	0.0%	0
Foyleside Shopping Centre, Orchard Street, Londonderry, BT48 6XY	2.2%	13	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Foyle View, Strand Road, Londonderry, BT48 7PU	0.7%	4	0.0%	0	0.0%	0	0.0%	0
Lidl, Buncrana Road / Springfield Road, Londonderry, BT48 0LY	0.7%	4	0.0%	0	0.0%	0	0.0%	0
Lisnagelvin Shopping Centre, Lisnagelvin Road, Londonderry, BT47 6DF	0.6%	4	0.0%	0	0.0%	0	0.0%	0
Londonderry City Centre	7.2%	42	6.5%	4	0.0%	0	0.0%	0
Quayside Shopping Centre, Strand Road, Londonderry, BT48 7PX	0.5%	3	0.0%	0	0.0%	0	0.0%	0
Richmond Shopping Centre, Ferryquay Street, Londonderry, BT48 6PE	0.7%	4	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Strand Road, Londonderry, BT48 7TL	0.9%	5	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Lisnagelvin Shopping Centre, Londonderry, BT47 6DA	3.7%	21	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Quayside Centre, Strand Road, Londonderry, BT48 7PX	1.2%	7	0.0%	0	0.0%	0	0.0%	0
The Range, Buncrana Road, Londonderry, BT48 8QN	0.7%	4	0.0%	0	0.0%	0	0.0%	0
<b>Outside Survey Area</b>								
Asda, Branch Road, Strabane, BT82 8EQ	0.5%	3	0.0%	0	0.0%	0	0.0%	0
Asda, Dromore Road, Omagh, BT78 1QZ	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Redlands Road, Larne, BT40 1AX	0.3%	1	0.0%	0	0.0%	0	6.3%	1
Asda, Sweep Road, Cookstown, BT80 8JR	0.4%	2	0.0%	0	0.0%	0	0.0%	0
Belfast City Centre	1.4%	8	0.0%	0	0.0%	0	2.2%	2
Braidwater Retail Park,	3.5%	20	0.0%	0	0.0%	0	5.1%	4

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Ballymena, BT42 3AG								
Centra Store, Antrim Road, Ballymena, BT42 2BJ	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Cookstown Town Centre	0.6%	3	0.0%	0	0.0%	0	0.0%	0
Douglas Town Centre	0.3%	2	3.0%	2	0.0%	0	0.0%	0
Home Bargains, Circular Road, Larne, BT40 3AH	0.0%	0	0.0%	0	0.0%	0	1.1%	0
Laharna Retail Park, Larne, BT40 1HR	0.3%	2	0.0%	0	0.0%	0	8.0%	2
Larne Town Centre	0.1%	1	0.0%	0	0.0%	0	2.7%	1
Lidl, Circular Road, Larne, BT40 1JS	0.1%	1	0.0%	0	0.0%	0	2.5%	1
Magherafelt Town Centre	3.7%	21	0.0%	0	0.0%	0	0.0%	0
Omagh Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Braidwater Retail Park, Ballymena, BT42 3AG	0.9%	5	0.0%	0	0.0%	0	3.4%	2
Strabane Town Centre	1.7%	10	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Ballyronan Road, Magherafelt, BT45 6BP	0.5%	3	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Larne Road, Ballymena, BT42 3HB	3.2%	19	0.0%	0	0.0%	0	1.6%	1
Tesco Superstore, Millennium Way, Lurgan, BT66 8DH	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Tesco Superstore, Orritor Road, Cookstown, BT80 8BH	0.2%	1	0.0%	0	0.0%	0	0.0%	0
The Junction Shopping Complex (aka Junction 1), Antrim, BT41 4LL	0.3%	2	3.0%	2	0.0%	0	0.0%	0
Weighted base:	578		62		107		73	
Sample:	610		91		92		88	
							24	
							85	
							70	
							85	
							66	
							179	
							84	

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
<b>Q23 Where did you last buy electrical items, such as televisions, washing machines and computers?</b>								
<i>Excl. Nulls &amp; SFT</i>								
<b>Zone 1</b>								
Limavady Town Centre	9.3%	39	36.2%	19	1.4%	1	0.0%	0
Rathbawn Business Park, Greystone Road, Limavady, BT49 0PB	0.3%	1	2.5%	1	0.0%	0	0.0%	0
Roxborough Electrics, Rathbawn Business Park, Limavady, BT49 0PB	0.6%	2	4.6%	2	0.0%	0	0.0%	0
Tesco Superstore, Main Street, Limavady, BT49 0ET	0.1%	0	0.8%	0	0.0%	0	0.0%	0
<b>Zone 2</b>								
Asda, Ring Road, Coleraine, BT52 1QP	0.3%	1	0.0%	0	0.7%	1	0.8%	0
Coleraine Town Centre	3.5%	15	4.2%	2	10.5%	9	5.4%	3
Kilrea Village Centre	2.8%	12	0.8%	0	1.4%	1	7.8%	4
Portrush Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Portstewart Town Centre	2.6%	11	0.0%	0	9.9%	8	0.0%	0
Riverside Retail Park (& The Jet Centre), Coleraine, BT51 3QQ	14.9%	62	11.8%	6	47.5%	40	21.2%	11
Sainsbury's Superstore, Riverside Retail Park, Coleraine, BT51 3QQ	0.2%	1	1.5%	1	0.0%	0	0.0%	0
Sperrin Business Park, Ballycastle Road, Coleraine, BT52 2DH	0.1%	1	0.0%	0	0.7%	1	0.0%	0
Tesco Superstore, Bannfield Road, Coleraine, BT52 1HU	0.4%	2	0.0%	0	2.0%	2	0.0%	0
Tesco Superstore, Coleraine Road, Portstewart, BT55 7PL	0.6%	3	0.0%	0	3.2%	3	0.0%	0
<b>Zone 3</b>								
Ballymoney Town Centre	8.7%	36	3.4%	2	13.1%	11	31.3%	17
Basil Knipe Electrics, Ballymena Road, Ballymoney, BT53 7EX	3.3%	14	0.0%	0	5.4%	5	10.8%	6
FMC Appliances, Tullaghans Road, Dunloy, Ballymena, BT44 9EB	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Portglenone Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Castle Street, Ballymoney, BT53 6JT	0.1%	0	0.0%	0	0.0%	0	0.0%	0
<b>Zone 4</b>								
Ballycastle Town Centre	0.7%	3	0.0%	0	0.0%	0	0.8%	0
Cushendall Village Centre	0.0%	0	0.0%	0	0.0%	0	1.0%	0
<b>Zone 5</b>								
Ballymena Town Centre	7.9%	33	0.0%	0	0.0%	0	10.1%	5
Broughshane Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0
<b>Zone 6</b>								
Bellaghy Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Draperstown Town Centre	2.1%	9	0.8%	0	0.0%	0	0.0%	0
Maghera Town Centre	1.0%	4	0.0%	0	0.0%	0	0.0%	0
<b>Zone 7</b>								
B&M, Strand Road, Londonderry, BT48 7PU	0.6%	3	0.0%	0	0.0%	0	0.0%	0
Campsie Business Park, Campsie, Londonderry, BT47 3XX	0.1%	0	0.8%	0	0.0%	0	0.0%	0
Crescent Link Retail Park, Londonderry, BT47 6SA	15.5%	65	16.4%	9	2.0%	2	0.0%	0
Eglinton Village Centre	1.0%	4	0.0%	0	0.0%	0	0.0%	0
Lidl, Buncrana Road / Springtown Road, Londonderry, BT48 0LY	1.0%	4	0.0%	0	0.0%	0	0.0%	0
Lisnagelvin Shopping Centre, Lisnagelvin Road, Londonderry, BT47 6DF	0.2%	1	0.0%	0	0.0%	0	0.0%	0
Londonderry City Centre	3.0%	12	0.8%	0	0.0%	0	0.0%	0

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7								
Maydown Electrics, Carrakeel Drive, Maydown, Londonderry, BT47 6UQ	0.9%	4	2.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	3		
Quinnspares, Bigwood Road, Ardmore, Londonderry, BT47 3RR	0.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	3		
Sainsbury's Superstore, Strand Road, Londonderry, BT48 7TL	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2		
Strand Electrics, Pennyburn Industrial Estate, Londonderry, BT48 0LU	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1		
Tesco Superstore, Lisnagelvin Shopping Centre, Londonderry, BT47 6DA	1.2%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	5		
<b>Outside Survey Area</b>																
Abbey Retail Park, Newtownabbey, Belfast, BT36 7LB	0.4%	2	0.0%	0	0.0%	0	0.0%	0	3.0%	0	0.0%	0	2.8%	1	0.0%	0
Antrim Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0
Asda, Branch Road, Strabane, BT82 8EQ	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	3		
Asda, Dromore Road, Omagh, BT78 1QZ	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0		
Belfast City Centre	1.4%	6	5.9%	3	2.2%	2	0.0%	0	0.0%	0	0.7%	0	0.9%	0	0.0%	0
Braidwater Retail Park, Ballymena, BT42 3AG	6.2%	26	0.0%	0	0.0%	0	7.4%	4	22.6%	3	34.2%	17	4.8%	2	0.0%	0
Callaghans Electrical Burt, Bohullion Lower, Burt, F93 XDP8	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1		
Cookstown Town Centre	1.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.1%	5	0.0%	0
Kells Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Laharna Retail Park, Larne, BT40 1HR	0.2%	1	0.0%	0	0.0%	0	0.0%	0	5.6%	1	0.0%	0	0.0%	0	0.0%	0
Larne Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Castledawson Road, Magherafelt, BT45 6PA	0.3%	1	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0
Lidl, Strabane Shopping Park, Bradley Way, Strabane, BT82 8EW	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1		
Magherafelt Town Centre	0.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.4%	4	0.0%	0
Omagh Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0
Orritor Road Retail Park (aka Broadfields Retail Park), Cookstown, BT80 8BH	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0
Ramsey Town Centre	0.4%	2	3.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rushmere Shopping Centre, Central Way, Craigavon, BT64 1AA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Braidwater Retail Park, Ballymena, BT42 3AG	0.4%	2	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Station Square Retail Park, Cookstown, BT80 8PA	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0
Strabane Town Centre	0.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	4
Tesco Superstore, Larne Road, Ballymena, BT42 3HB	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	3	0.0%	0	0.0%	0
The Junction Shopping Complex (aka Junction 1), Antrim, BT41 4LL	0.4%	2	3.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:	420		52		84		53		13		50		46		122	
Sample:	463		73		72		65		58		71		62		62	

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7								
<b>Q24 Where did you last buy DIY or gardening goods?</b>																
<i>Excl. Nulls &amp; SFT</i>																
<b>Zone 1</b>																
Claudy Village Centre	0.4%	2	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coopers Lane Garden Centre, Ballyquin Road, Limavady, BT49 9EZ	1.9%	8	14.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dungiven Town Centre Lidl, Main Street, Limavady, BT49 0EP	0.1%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Limavady Town Centre Seacoast Nurseries, Seacoast Road, Limavady, BT49 9DW	3.5%	14	18.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	4
Spar, Seacoast Road, Bellarena, BT49 0LD	2.2%	9	14.3%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	1
<b>Zone 2</b>																
Asda, Ring Road, Coleraine, BT52 1QP	0.3%	1	2.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coleraine Town Centre Creative Gardens Bushmills, Ballyclogh Road, Bushmills, BT57 8XA	1.7%	7	0.0%	0	6.4%	5	2.8%	1	0.8%	0	0.0%	0	0.0%	0	0.0%	0
2.6%	10	1.5%	1	4.6%	4	9.6%	4	2.4%	0	0.0%	0	0.0%	0	0.9%	1	
Damhead Nursery (Lamonts Garden Centre), Damhead Road, Coleraine, BT52 2JS	0.5%	2	0.0%	0	2.1%	2	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
David Coils Farm, Garden, Solid Fuel, Lawnmowers, Hillman's Way, Coleraine, BT52 2ED	0.6%	2	0.0%	0	3.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Garvagh Village Centre	0.9%	4	0.0%	0	4.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kilrea Village Centre	0.5%	2	0.0%	0	0.7%	1	2.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Riverside Retail Park, Coleraine, BT51 3QQ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.9%	0	0.0%	0
Riverside Retail Park (& The Jet Centre), Coleraine, BT51 3QQ	24.2%	97	13.7%	7	72.9%	60	30.9%	14	8.1%	1	2.3%	1	11.2%	5	7.0%	7
Screwfix, Sperrin Business Park, Ballycastle Road, Coleraine, BT52 2DH	0.5%	2	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sperrin Business Park, Ballycastle Road, Coleraine, BT52 2DH	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Coleraine Road, Portstewart, BT55 7PL	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
<b>Zone 3</b>																
Ashwood Garden Centre, Greenhill Road, Ballymoney, BT53 6LZ	0.9%	4	0.0%	0	0.0%	0	7.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ballymoney Town Centre Convery's Island Nurseries, Kilrea Road, Portglenone, BT44 8JL	2.0%	8	0.0%	0	0.0%	0	16.3%	8	0.0%	0	0.0%	0	0.9%	0	0.0%	0
0.5%	2	0.0%	0	0.0%	0	0.9%	0	0.0%	0	1.4%	1	1.7%	1	0.0%	0	
Lidl, Meeting House Street, Ballymoney, BT53 6JN	0.1%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
MacBlair (Builders Merchant), Ballybrakes Road, Ballymoney, BT53 6LQ	0.5%	2	0.0%	0	0.0%	0	4.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
MacBlair (Builders Merchant), Garvagh Road, Portglenone, BT44 8EF	0.1%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
North Antrim Nurseries, Moycraig Road, Mossside, Dervock, Ballymoney, BT53 8EL	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0	0.0%	0
<b>Zone 4</b>																
Ballycastle Town Centre	0.5%	2	0.0%	0	0.0%	0	0.0%	0	12.1%	2	0.0%	0	0.0%	0	0.0%	0
Cushendall Village Centre	0.5%	2	0.0%	0	0.0%	0	0.0%	0	12.0%	2	0.0%	0	0.0%	0	0.0%	0
Eurospar, Ramoan Road,	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Ballycastle, BT54 6EG								
Lidl, Larne Link Road, Ballymena, BT44 0BD	0.1%	0	0.0%	0	0.0%	0	0.0%	0
<b>Zone 5</b>								
Ahoghill Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Ballymena Town Centre	3.3%	13	0.0%	0	0.0%	2	8.3%	1
Broughshane Village Centre	1.6%	6	0.0%	0	0.0%	0	2.3%	0
Creative Gardens Galgorm, Galgorm Road, Galgorm Parks, Ballymena, BT42 1HL	0.7%	3	0.0%	0	0.0%	0	0.9%	0
<b>Zone 6</b>								
Birchview Garden Centre, Aughrim Road, Magherafelt, BT45 8HB	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Booth Lawnmowers & Garden Machinery, Lower Town Road, Magherafelt, BT45 5DU	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Castledawson Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Draperstown Town Centre	0.6%	2	0.0%	0	0.0%	0	0.0%	0
Eurospar, Main Street, Maghera, BT46 5AB	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Gortin Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0
Maghera Town Centre	1.4%	5	0.0%	0	0.0%	0	0.0%	0
Mid Ulster Garden Centre, Station Road, Maghera, BT46 5BS	1.3%	5	0.8%	0	0.0%	0	0.0%	0
Montgomery Nurseries & Garden Centre, Kilrea Road, Maghera, BT46 5HX	0.2%	1	0.0%	0	0.0%	0	0.0%	0
Tobermore Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0
<b>Zone 7</b>								
Altnagelvin Garden Centre, Irish Street, Londonderry, BT47 2ND	6.7%	27	4.1%	2	0.0%	0	0.0%	0
Crescent Link Retail Park, Londonderry, BT47 6SA	5.5%	22	7.8%	4	0.0%	0	0.0%	0
Lidl, Buncrana Road / Springtown Road, Londonderry, BT48 0LY	0.2%	1	0.0%	0	0.0%	0	0.0%	0
Lisnagelvin Shopping Centre, Lisnagelvin Road, Londonderry, BT47 6DF	1.0%	4	0.0%	0	0.0%	0	0.0%	0
Londonderry City Centre	1.8%	7	0.0%	0	2.3%	2	0.0%	0
Maydown Village Centre	1.1%	4	0.0%	0	0.0%	0	0.0%	0
Screwfix, Springtown Road, Londonderry, BT48 0LY	0.9%	4	0.0%	0	0.0%	0	0.0%	0
Springrowth Garden Centre, Springrowth Business Park, Londonderry, BT48 0LY	3.6%	14	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Quayside Centre, Strand Road, Londonderry, BT48 7PX	0.2%	1	0.0%	0	0.0%	0	0.0%	0
The Range, Buncrana Road, Londonderry, BT48 8QN	0.7%	3	0.0%	0	0.0%	0	0.0%	0
<b>Outside Survey Area</b>								
Antrim Town Centre	0.5%	2	0.0%	0	0.0%	0	0.0%	0
Arbuckle & Calderwood, Queen Street, Ballymena, BT42 2BE	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Branch Road, Strabane, BT82 8EQ	0.7%	3	0.0%	0	0.0%	0	0.0%	0
B&Q, Airport Road West, Holywood, Belfast, BT3 9EJ	0.3%	1	0.0%	0	0.0%	1	0.0%	0
BMG Homevalue Hardware & Garden Centre, Finner Road Roundabout, Bundoran, Ireland	0.1%	0	0.8%	0	0.0%	0	0.0%	0
Bearney Nurseries, Liskey Road, Strabane, BT82	0.1%	0	0.0%	0	0.0%	0	0.9%	0

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
<b>8NR</b>								
Belfast City Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Ben Vista Garden Centre, Crosskeys Road, Ballymena, BT42 2QT	0.7%	3	0.0%	0	0.0%	0	4.0%	2
Braidwater Retail Park, Ballymena, BT42 3AG	7.4%	30	0.0%	0	0.0%	0	6.7%	3
Coleman's Garden Centre, Old Ballyclare Road, Templepatrick, BT39 0BJ	0.2%	1	0.8%	0	0.0%	0	0.9%	0
Cookstown Town Centre	0.6%	3	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre Antrim, The Junction, Ballymena Road, Antrim, BT41 4LL	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Circular Road, Larne, BT40 3AH	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Home Bargains, Queen Street, Ballymena, BT42 2BG	0.2%	1	0.0%	0	0.0%	0	0.0%	0
Inver Garden Centre, Brownodod Road, Milbrook, Larne, BT40 3JS	0.1%	1	0.0%	0	0.0%	0	3.1%	1
Laharna Retail Park, Larne, BT40 1HR	0.1%	0	0.0%	0	0.0%	0	2.6%	0
Larne Town Centre	0.5%	2	0.0%	0	0.0%	0	12.5%	2
Lidl, Castledawson Road, Magherafelt, BT45 6PA	0.2%	1	0.0%	0	0.0%	0	0.0%	0
Lidl, Strabane Shopping Park, Bradley Way, Strabane, BT82 8EW	0.5%	2	0.0%	0	0.0%	0	0.0%	0
Magherafelt Building Supplies, Church Street, Magherafelt, BT45 6AW	0.5%	2	0.0%	0	0.0%	0	0.0%	0
Magherafelt Town Centre	1.5%	6	0.0%	0	0.0%	0	0.0%	0
Montrose Garden Supplies, Wakehurst Road, Ballymena, BT42 3AZ	0.8%	3	0.0%	0	0.0%	0	0.0%	0
Orritor Road Retail Park (aka Broadfields Retail Park), Cookstown, BT80 8BH	0.5%	2	0.0%	0	0.0%	0	0.0%	0
Orritor Road, Cookstown Pennybridge Industrial Estate, Ballymena, BT42 3HB	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Braidwater Retail Park, Ballymena, BT42 3AG	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Ballyronan Road, Magherafelt, BT45 6EN	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Screwfix, Pennybridge Industrial Estate, Ballymena, BT42 3HB	1.1%	4	0.0%	0	0.0%	0	2.5%	1
Strabane Town Centre	1.7%	7	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Ballyronan Road, Magherafelt, BT45 6BP	0.1%	0	0.0%	0	0.0%	0	0.0%	0
The Junction Shopping Complex (aka Junction 1), Antrim, BT41 4LL	0.2%	1	0.0%	0	0.0%	0	2.3%	0
The Range, Orritor Road, Cookstown, BT80 8BH	0.4%	2	0.0%	0	0.0%	0	0.0%	0
Weighted base:	400	54	83	46	16	51	47	103
Sample:	435	70	68	57	62	65	63	50

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7								
<b>Q25 Where did you last buy furniture, carpets and floor coverings?</b>																
<i>Excl. Nulls &amp; SFT</i>																
<b>Zone 1</b>																
Express Interiors, Ballyquin Road, Limavady, BT49 9EY	0.4%	1	3.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Limavady Town Centre McClarey's Carpets, Windyhill Road, Limavady, BT49 0JW	4.0% 0.8%	14 3	28.4% 8.2%	10 3	0.0% 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	4 0		
<b>Zone 2</b>																
Coleraine Town Centre Garvagh Village Centre Loguestown Industrial Estate, Bushmills Road, Coleraine, BT52 2NS	11.2% 0.1% 0.2%	38 0 1	7.0% 0.0% 0.0%	2 0 0	43.2% 0.0% 0.8%	31 0 1	6.1% 0.0% 0.0%	3 0 0	3.5% 0.0% 0.0%	1 0 0	1.5% 0.0% 0.0%	1 0 0	1.0% 1.0% 0.0%	0 0 0	0.0% 0.0% 0.0%	0
Portrush Town Centre Right Price Carpets & Furniture, Cloyfin Road, Coleraine, BT52 2NU	0.0% 2.5%	0 9	0.0% 0.0%	0 0	0.0% 6.6%	0 5	0.0% 7.6%	0 3	0.7% 0.0%	0 0	0.0% 0.7%	0 0	0.0% 0.0%	0 0	0.0% 0.0%	0
Riverside Retail Park (& The Jet Centre), Coleraine, BT51 3QQ	6.9%	24	2.4%	1	21.6%	16	11.5%	5	4.3%	1	0.0%	0	3.0%	1	0.0%	0
Small Cost Carpets, Hillman's Way, Coleraine, BT52 2ED	0.5%	2	0.0%	0	1.6%	1	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Somerset Furnishings, Sperrin Business Park, Ballycastle Road, Coleraine, BT52 2DH	0.6%	2	3.8%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
<b>Zone 3</b>																
Ballybee Barpets & Flooring, Ballybrakes Business Park, Ballymoney, BT53 7PL	0.5%	2	0.0%	0	0.0%	0	4.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ballymoney Town Centre Classic Floors, Eastburn Avenue, Ballymoney, BT53 6PL	7.7% 1.6%	26 5	0.0% 0.0%	0 0	6.7% 0.0%	5 0	39.0% 12.2%	17 5	5.0% 0.0%	1 0	6.4% 0.0%	3 0	0.0% 0.0%	0 0	0.0% 0.0%	0
Knock Road Furnishings, Knock Road, Ballymoney, BT53 6LY	0.3%	1	0.0%	0	0.8%	1	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Logans of Cloughmills, Frosses Road, Ballymena, BT44 9PU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Portglenone Town Centre Somerset Furnishings, Taughey Road, Ballymoney, BT53 6RA	0.6% 0.2%	2 1	0.0% 0.0%	0 0	0.0% 0.8%	0 1	0.9% 0.0%	0 0	0.0% 0.0%	0 0	3.1% 0.0%	2 0	0.0% 0.0%	0 0	0.0% 0.0%	0
<b>Zone 4</b>																
Ballycastle Town Centre	0.6%	2	0.0%	0	0.0%	0	0.0%	0	11.1%	2	0.0%	0	0.0%	0	0.0%	0
<b>Zone 5</b>																
Ahoghill Town Centre Ballymena Town Centre Clydes Building Supplies & Kitchen Centre, Ballylig Road, Broughshane, BT43 7HH	0.2% 10.7% 0.3%	1 37	0.0% 1.2%	0 0	0.0% 0.8%	0 1	0.0% 8.6%	0 4	0.0% 37.2%	0 7	1.5% 47.9%	1 24	0.0% 4.0%	0 2	0.0% 0.0%	0
<b>Zone 6</b>																
Maghera Town Centre Station Road Industrial Estate, Station Road, Magherafelt, BT45 5EY	2.5% 0.7%	8 2	0.0% 0.0%	0 0	0.0% 0.0%	0 0	0.0% 0.0%	0 0	2.1% 0.0%	0 0	0.7% 0.0%	0 0	19.5% 5.8%	8 2	0.0% 0.0%	0
Tobermore Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0
<b>Zone 7</b>																
Ballyore Retail Park, Victoria Road, Newbuildings, Londonderry, BT47 2TH	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
CFC Interiors, County, Clooney Road, Campsie, BT47 3PA	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2
Campsie Business Park,	0.1%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7								
Campsie, Londonderry, BT47 3XX																
Carpet Centre, Glendermott Road, Londonderry, BT47 6BG	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1				
Crescent Link Retail Park, Londonderry, BT47 6SA	8.0%	27	6.7%	2	0.0%	0	0.0%	0	0.0%	0	29.8%	25				
Crumley's Furnishings, William Street, Londonderry, BT48 6EP	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1				
Faustina Retail Park, Buncrana Road, Londonderry, BT48 8TH	0.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	3				
Foyleside Shopping Centre, Orchard Street, Londonderry, BT48 6XY	1.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	4				
Glenkeen Furnishings, Glendermott Road, Londonderry, BT47 6BG	3.8%	13	3.4%	1	0.0%	0	0.0%	0	0.0%	0	14.0%	12				
Lisnagelvin Retail Park, Crescent Road, Londonderry, BT47 2NQ	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1				
Londonderry City Centre	4.7%	16	1.2%	0	2.6%	2	0.0%	0	0.0%	0	0.0%	0	16.5%	14		
McCarter Carpets & Flooring, Church Brae, Altanagelvin, Londonderry, BT47 3QG	0.5%	2	5.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0		
Quayside Shopping Centre, Strand Road, Londonderry, BT48 7PX	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1		
Tesco Superstore, Quayside Centre, Strand Road, Londonderry, BT48 7PX	0.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	3		
Town & Country Discount, Culmore Road, Londonderry, BT48 8JL	0.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	3		
<b>Outside Survey Area</b>																
Balmoral Plaza, Boucher Road, Belfast, BT12 6HR	0.2%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0		
Belfast City Centre	4.6%	16	14.4%	5	2.6%	2	0.0%	0	0.0%	0	9.1%	4	1.0%	0	4.9%	4
Bradley's Furniture, Aughrim Road, Magherafelt, BT45 6JY	0.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	3	0.0%	0	0.0%	0
Braidwater Retail Park, Ballymena, BT42 3AG	2.7%	9	0.0%	0	0.8%	1	0.0%	0	4.0%	1	16.0%	8	0.0%	0	0.0%	0
Bridge End Village Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Buncrana Town Centre	0.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	3
Carsons Of Duneane, Moneynick Road, Randalstown, BT41 3HU	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Cookstown Town Centre	1.9%	6	1.2%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0	12.1%	5	0.0%	0
Dungannon Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0
Floors For Living, Church Street, Magherafelt, BT45 6AW	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	2	0.0%	0
IKEA Belfast, Holywood Exchange, Airport Road West, Belfast, BT3 9EJ	1.9%	7	1.2%	0	6.9%	5	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Laharna Retail Park, Larne, BT40 1HR	0.1%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	0	0.0%	0	0.0%	0	0.0%	0
Larne Town Centre	1.4%	5	0.0%	0	0.0%	0	0.0%	0	20.8%	4	2.1%	1	0.0%	0	0.0%	0
Magherafelt Town Centre	2.7%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.4%	9	0.0%	0
Marks & Spencer (M&S Store), Hillsborough Road, Sprucefield Roundabout, Lisburn, BT27 5UJ	0.5%	2	0.0%	0	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
McGuckin Furniture, Moss Road, Ballinderry, Cookstown, BT80 0BZ	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	1	0.0%	0	0.0%	0
Moy Town Centre	0.1%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newtownstewart Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	1	2.1%	1	0.0%	0
Orritor Road Retail Park (aka Broadfields Retail Park),	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	2	0.0%	0	0.0%	0

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Cookstown, BT80 8BH								
Pennybridge Industrial Estate, Ballymena, BT42 3HB	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Rea's of Larne, Bank Road, Larne, BT40 3AN	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Small Cost Carpets, Railway Street, Ballymena, BT42 2AD	1.2%	4	0.0%	0	0.0%	0	2.1%	0
Station Square Retail Park, Cookstown, BT80 8PA	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Strabane Town Centre	1.2%	4	3.8%	1	0.0%	0	0.0%	0
The Bridge Retail Park, Larne Road, Ballymena, BT42 3HA	0.3%	1	0.0%	0	0.0%	0	0.0%	0
The Junction Shopping Complex (aka Junction 1), Antrim, BT41 4LL	0.5%	2	5.5%	2	0.0%	0	0.0%	0
Village Floors, Larne Road, Ballymena, BT42 3HA	0.5%	2	0.0%	0	0.0%	0	0.0%	0
Weighted base:	342		34		72		45	
Sample:	349		44		58		47	
							18	
							49	
							39	
							46	
							41	
							84	

**Q26 Do you ever visit any of the following centres? [MR/PR]**

Coleraine	55.4%	388	72.5%	52	81.5%	98	68.2%	58	43.5%	13	40.5%	34	48.4%	41	41.1%	93
Coleraine Riverside Retail Park	56.0%	392	78.3%	56	94.4%	113	73.1%	62	47.8%	14	42.4%	35	49.6%	42	30.7%	70
Limavady	34.7%	243	94.7%	68	26.0%	31	19.7%	17	6.5%	2	13.4%	11	11.1%	9	46.4%	105
Ballycastle	25.5%	178	20.7%	15	25.0%	30	37.6%	32	56.7%	17	22.3%	19	17.9%	15	22.6%	51
Ballymoney	37.2%	260	37.3%	27	48.1%	58	87.2%	74	35.8%	11	33.2%	28	26.8%	23	18.3%	41
Portrush	43.7%	306	43.2%	31	50.5%	61	50.2%	42	32.0%	9	35.3%	29	43.3%	36	42.6%	97
Portstewart	40.5%	284	41.2%	29	53.2%	64	52.6%	45	24.8%	7	31.2%	26	47.1%	39	32.1%	73
(Don't visit any of these centres)	20.9%	146	1.7%	1	0.5%	1	4.2%	4	34.8%	10	38.4%	32	35.3%	30	30.5%	69
Weighted base:		700		71		120		85		30		83		84		227
Sample:		700		100		100		100		100		100		100		100

**Q27 Which of those centres do you visit the most?**

Not those that said '(Don't visit any of these centres)' at Q26

Coleraine	23.7%	131	15.5%	11	38.5%	46	9.5%	8	9.4%	2	18.8%	10	35.6%	19	22.6%	36
Coleraine Riverside Retail Park	17.3%	96	6.6%	5	35.5%	42	15.7%	13	14.7%	3	17.6%	9	22.1%	12	7.6%	12
Limavady	20.1%	111	70.4%	49	1.5%	2	1.6%	1	0.0%	0	0.0%	0	0.0%	0	37.3%	59
Ballycastle	6.1%	34	0.0%	0	0.5%	1	8.3%	7	57.1%	11	9.0%	5	0.7%	0	6.7%	10
Ballymoney	12.5%	69	0.0%	0	11.2%	13	47.0%	38	11.8%	2	19.5%	10	10.4%	6	0.0%	0
Portrush	11.3%	63	2.4%	2	3.9%	5	7.9%	6	5.6%	1	23.1%	12	14.4%	8	18.3%	29
Portstewart	9.0%	50	5.1%	4	9.0%	11	9.9%	8	1.3%	0	12.0%	6	16.8%	9	7.6%	12
Weighted base:		554		70		120		81		19		51		54		158
Sample:		575		97		99		98		73		66		72		70

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7								
<b>Q28 Why don't you visit Coleraine? [MR]</b>																
<i>Those that didn't say 'Coleraine' at Q26</i>																
Too far away from home	22.9%	72	38.8%	8	11.6%	3	28.4%	8	36.4%	6	25.2%	13	34.6%	15	15.1%	20
Lack of choice and range of non-food shops	10.5%	33	12.7%	3	39.9%	9	16.4%	4	5.0%	1	15.3%	8	7.0%	3	4.2%	6
Health / mobility reasons	2.9%	9	4.1%	1	2.6%	1	6.8%	2	2.2%	0	2.2%	1	0.9%	0	2.9%	4
Lack of choice and range of food shops	2.7%	8	10.7%	2	11.0%	2	4.8%	1	5.9%	1	3.2%	2	0.0%	0	0.0%	0
Not accessible by public transport	2.2%	7	2.1%	0	0.0%	0	1.5%	0	0.8%	0	0.0%	0	4.6%	2	3.1%	4
Inconveniently located car parking	1.8%	6	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0	4.0%	2	2.7%	4
Too far away from work	1.8%	5	0.0%	0	0.0%	0	0.0%	0	3.4%	1	9.9%	5	0.0%	0	0.0%	0
Traffic congestion	1.7%	5	0.0%	0	0.0%	0	3.0%	1	0.0%	0	0.7%	0	2.7%	1	2.2%	3
Environmental quality of centre	1.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2	0.0%	0	2.0%	3
Too busy / crowded	1.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	4
Don't know what's there / not familiar with the area	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1	0.7%	1
Expensive car parking	0.6%	2	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0	2.7%	1	0.0%	0
Choice of services (hairdressers, banks etc.)	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2	0.0%	0	0.0%	0
Choice of leisure facilities (cinema, gym, pubs etc.)	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2	0.0%	0	0.0%	0
Don't drive / have access to a car	0.4%	1	4.1%	1	0.0%	0	1.5%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0
Doesn't have an M&S store	0.2%	1	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hard to get to by car	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Difficult to park / lack of parking	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor layout / difficult to get around	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor service in the cafes	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
It's expensive there	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Too many tourists	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing, no reason to visit)	54.1%	169	38.2%	8	33.8%	8	40.9%	11	50.2%	8	56.5%	28	42.2%	18	66.0%	88
(Don't know)	1.5%	5	0.0%	0	12.0%	3	0.0%	0	0.0%	0	0.0%	0	4.3%	2	0.0%	0
Weighted base:		312		20		22		27		17		50		43		133
Sample:		276		27		13		34		48		53		49		52

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7								
<b>Q29 Why don't you visit Coleraine Riverside Retail Park? [MR]</b>																
<i>Those that didn't say 'Coleraine Riverside Retail Park' at Q26</i>																
Too far away from home	24.4%	75	51.9%	8	36.2%	2	27.7%	6	39.5%	6	26.0%	13	31.7%	13	16.8%	26
Not accessible by public transport	3.4%	10	5.2%	1	0.0%	0	1.8%	0	0.8%	0	3.7%	2	7.5%	3	2.6%	4
Lack of choice and range of non-food shops	2.4%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.9%	4	8.5%	4	0.0%	0
Health / mobility reasons	2.0%	6	2.6%	0	8.6%	1	0.0%	0	0.0%	0	3.0%	1	0.0%	0	2.5%	4
Traffic congestion	1.7%	5	0.0%	0	0.0%	0	8.6%	2	0.0%	0	0.7%	0	0.0%	0	1.9%	3
Too busy / crowded	1.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	4
Too far away from work	1.3%	4	0.0%	0	0.0%	0	0.0%	0	3.7%	1	6.9%	3	0.0%	0	0.0%	0
Lack of choice and range of food shops	0.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	3	0.0%	0	0.0%	0
Choice of leisure facilities (cinema, gym, pubs etc.)	0.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	3	0.0%	0	0.0%	0
Don't know what's there / not familiar with the area	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.7%	0	0.0%	0	1.2%	2
Environmental quality of centre	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.0%	0	0.0%	0
Choice of services (hairdressers, banks etc.)	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.0%	0	0.0%	0
Don't drive / have access to a car	0.5%	2	5.2%	1	8.6%	1	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0
Expensive car parking	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0
Inconveniently located car parking	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Doesn't have an M&S store	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hard to get to by car	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Difficult to park / lack of parking	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor layout / difficult to get around	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor service in the cafes	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
It's expensive there	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Too many tourists	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing, no reason to visit)	60.5%	186	35.0%	5	46.6%	3	61.9%	14	54.3%	8	57.1%	27	45.2%	19	69.2%	109
(Don't know)	2.2%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	2	3.2%	5
Weighted base:		308		15		7		23		15		48		42		157
Sample:		280		26		6		28		48		59		47		66

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7								
<b>Q30 Why don't you visit Limavady? [MR]</b>																
<i>Those that didn't say 'Limavady' at Q26</i>																
Too far away from home	35.4%	162	21.2%	1	33.5%	30	49.5%	34	43.8%	12	40.8%	29	47.3%	35	17.1%	21
Lack of choice and range of non-food shops	6.3%	29	10.6%	0	11.9%	11	14.2%	10	7.5%	2	3.2%	2	0.0%	0	2.9%	4
Lack of choice and range of food shops	4.1%	19	10.6%	0	8.9%	8	7.9%	5	4.0%	1	4.3%	3	0.0%	0	0.8%	1
Not accessible by public transport	2.9%	13	0.0%	0	3.2%	3	3.5%	2	0.0%	0	1.9%	1	3.2%	2	3.4%	4
Inconveniently located car parking	1.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	3.4%	4
Choice of leisure facilities (cinema, gym, pubs etc.)	1.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	5	0.0%	0	0.0%	0	0.0%	0
Traffic congestion	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	2.4%	3
Health / mobility reasons	0.7%	3	0.0%	0	0.7%	1	0.6%	0	0.9%	0	1.0%	1	0.5%	0	0.8%	1
Too far away from work	0.5%	2	0.0%	0	0.0%	0	0.0%	0	2.1%	1	2.3%	2	0.0%	0	0.0%	0
Don't drive / have access to a car	0.4%	2	0.0%	0	1.9%	2	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0
Expensive car parking	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0
Environmental quality of centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0
Choice of services (hairdressers, banks etc.)	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0
Don't know what's there / not familiar with the area	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Hard to get to by car	0.1%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Doesn't have an M&S store	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Difficult to park / lack of parking	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
It's expensive there	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor layout / difficult to get around	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor service in the cafes	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Too busy / crowded	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Too many tourists	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing, no reason to visit)	48.9%	224	68.2%	3	44.2%	39	27.4%	19	45.2%	13	42.0%	30	42.6%	32	72.7%	88
(Don't know)	2.7%	12	0.0%	0	3.7%	3	3.3%	2	0.0%	0	4.9%	4	4.3%	3	0.0%	0
Weighted base:		457		4		89		68		28		72		75		122
Sample:		461		6		65		80		93		84		84		49

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7								
<b>Q31 Why don't you visit Ballycastle? [MR]</b>																
<i>Those that didn't say 'Ballycastle' at Q26</i>																
Too far away from home	39.2%	204	55.4%	31	43.4%	39	41.1%	22	32.8%	4	38.9%	25	53.2%	37	26.2%	46
Lack of choice and range of non-food shops	3.9%	20	0.7%	0	2.1%	2	15.1%	8	0.0%	0	12.2%	8	0.6%	0	1.1%	2
Not accessible by public transport	2.4%	12	1.4%	1	0.6%	1	0.8%	0	0.0%	0	1.6%	1	3.5%	2	4.0%	7
Lack of choice and range of food shops	2.3%	12	0.7%	0	2.1%	2	13.2%	7	0.0%	0	2.5%	2	0.0%	0	0.5%	1
Too far away from work	1.0%	5	0.0%	0	2.9%	3	0.0%	0	9.1%	1	2.5%	2	0.0%	0	0.0%	0
Environmental quality of centre	0.8%	4	0.0%	0	2.1%	2	0.0%	0	1.0%	0	3.6%	2	0.0%	0	0.0%	0
Too busy / crowded	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	4
Traffic congestion	0.6%	3	0.0%	0	0.0%	0	0.0%	0	3.2%	0	0.0%	0	0.0%	0	1.7%	3
Choice of leisure facilities (cinema, gym, pubs etc.)	0.6%	3	0.0%	0	0.0%	0	3.4%	2	0.0%	0	2.5%	2	0.0%	0	0.0%	0
Health / mobility reasons	0.5%	2	0.7%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.6%	0	0.5%	1
Expensive car parking	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0
Choice of services (hairdressers, banks etc.)	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0
Inconveniently located car parking	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0
Don't know what's there / not familiar with the area	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Don't drive / have access to a car	0.1%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor service in the cafes	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hard to get to by car	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Difficult to park / lack of parking	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor layout / difficult to get around	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Doesn't have an M&S store	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
It's expensive there	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Too many tourists	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing, no reason to visit)	48.7%	254	42.4%	24	45.2%	41	45.1%	24	58.5%	7	44.5%	29	37.7%	26	58.8%	103
(Don't know)	3.0%	16	0.0%	0	5.9%	5	0.0%	0	0.0%	0	0.0%	0	2.7%	2	4.7%	8
Weighted base:		522		57		90		53		13		65		69		175
Sample:		469		79		72		56		35		71		79		77

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
<b>Q32 Why don't you visit Ballymoney? [MR]</b>								
<i>Those that didn't say 'Ballymoney' at Q26</i>								
Too far away from home	29.1%	128	50.2%	23	15.3%	10	32.7%	4
Lack of choice and range of non-food shops	5.6%	25	5.2%	2	16.1%	10	3.7%	0
Not accessible by public transport	2.8%	12	2.7%	1	0.0%	0	0.0%	0
Lack of choice and range of food shops	2.2%	10	2.6%	1	4.3%	3	3.7%	0
Too busy / crowded	1.0%	4	0.0%	0	0.0%	0	0.0%	0
Health / mobility reasons	0.7%	3	0.0%	0	0.9%	1	0.0%	0
Traffic congestion	0.7%	3	0.0%	0	0.0%	0	0.0%	0
Don't know what's there / not familiar with the area	0.5%	2	0.9%	0	0.0%	0	0.0%	0
Too far away from work	0.5%	2	0.0%	0	0.0%	0	3.0%	1
Environmental quality of centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0
Expensive car parking	0.4%	2	0.0%	0	0.0%	0	0.0%	0
Choice of services (hairdressers, banks etc.)	0.4%	2	0.0%	0	0.0%	0	0.0%	0
Choice of leisure facilities (cinema, gym, pubs etc.)	0.4%	2	0.0%	0	0.0%	0	0.0%	0
Inconveniently located car parking	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Don't drive / have access to a car	0.1%	1	0.9%	0	0.0%	0	0.7%	0
Doesn't have an M&S store	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hard to get to by car	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Difficult to park / lack of parking	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor layout / difficult to get around	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor service in the cafes	0.0%	0	0.0%	0	0.0%	0	0.0%	0
It's expensive there	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Too many tourists	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing, no reason to visit)	57.9%	254	43.5%	20	66.7%	42	63.6%	7
(Don't know)	2.1%	9	0.0%	0	5.2%	3	0.0%	0
Weighted base:		440		45		62		11
Sample:		387		68		46		11

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7								
<b>Q33 Why don't you visit Portrush? [MR]</b>																
<i>Those that didn't say 'Portrush' at Q26</i>																
Too far away from home	20.3%	80	20.9%	8	2.0%	1	16.6%	7	33.3%	7	24.8%	13	34.2%	16	20.8%	27
Lack of choice and range of non-food shops	6.8%	27	2.0%	1	16.5%	10	11.9%	5	3.8%	1	12.2%	7	7.7%	4	0.0%	0
Lack of choice and range of food shops	3.8%	15	1.0%	0	7.9%	5	7.0%	3	2.5%	1	8.5%	5	3.8%	2	0.0%	0
Too busy / crowded	3.3%	13	4.9%	2	5.6%	3	3.0%	1	0.6%	0	0.7%	0	3.3%	2	3.3%	4
Traffic congestion	2.8%	11	5.4%	2	1.0%	1	7.4%	3	7.1%	1	0.0%	0	0.0%	0	3.0%	4
Not accessible by public transport	2.6%	10	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	3	5.4%	7
Environmental quality of centre	1.6%	6	0.0%	0	1.0%	1	1.9%	1	3.9%	1	2.9%	2	0.0%	0	2.0%	3
Inconveniently located car parking	1.5%	6	4.2%	2	6.4%	4	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Health / mobility reasons	0.9%	3	0.0%	0	1.0%	1	0.0%	0	0.6%	0	2.7%	1	0.9%	0	0.7%	1
Too far away from work	0.6%	2	0.0%	0	0.0%	0	0.0%	0	2.8%	1	3.1%	2	0.0%	0	0.0%	0
Expensive car parking	0.5%	2	0.0%	0	0.0%	0	0.9%	0	0.0%	0	3.1%	2	0.0%	0	0.0%	0
Choice of services (hairdressers, banks etc.)	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2	0.0%	0	0.0%	0
Choice of leisure facilities (cinema, gym, pubs etc.)	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2	0.0%	0	0.0%	0
Don't drive / have access to a car	0.2%	1	1.0%	0	0.0%	0	0.9%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Don't know what's there / not familiar with the area	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Poor layout / difficult to get around	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Difficult to park / lack of parking	0.1%	1	1.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Too many tourists	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Doesn't have an M&S store	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hard to get to by car	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor service in the cafes	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
It's expensive there	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing, no reason to visit)	58.2%	229	60.6%	25	63.0%	38	60.7%	26	44.7%	9	60.2%	33	44.2%	21	60.8%	79
(Don't know)	2.3%	9	0.0%	0	4.5%	3	0.0%	0	1.9%	0	0.0%	0	3.9%	2	3.3%	4
Weighted base:		394		41		60		42		20		54		48		130
Sample:		377		57		43		50		66		56		51		54

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
<b>Q34 Why don't you visit Portstewart? [MR]</b>								
<i>Those that didn't say 'Portstewart' at Q26</i>								
Too far away from home	21.4%	89	30.3%	13	12.4%	7	15.9%	6
Lack of choice and range of non-food shops	6.2%	26	2.8%	1	15.6%	9	12.9%	5
Lack of choice and range of food shops	3.8%	16	2.8%	1	9.3%	5	12.9%	5
Traffic congestion	3.4%	14	5.2%	2	1.0%	1	7.8%	3
Not accessible by public transport	2.4%	10	1.0%	0	1.0%	1	0.0%	0
Too busy / crowded	1.6%	7	1.0%	0	0.0%	0	4.2%	2
Health / mobility reasons	0.9%	4	0.0%	0	1.0%	1	0.0%	0
Expensive car parking	0.8%	3	0.0%	0	0.0%	0	0.0%	0
Choice of leisure facilities (cinema, gym, pubs etc.)	0.7%	3	2.8%	1	0.0%	0	0.0%	0
Inconveniently located car parking	0.6%	3	1.0%	0	1.0%	1	1.0%	0
Too far away from work	0.5%	2	0.0%	0	0.0%	0	2.6%	1
Environmental quality of centre	0.5%	2	0.0%	0	0.0%	0	1.9%	0
Choice of services (hairdressers, banks etc.)	0.4%	2	0.0%	0	0.0%	0	0.0%	0
Don't drive / have access to a car	0.2%	1	1.0%	0	0.0%	0	1.0%	0
Don't know what's there / not familiar with the area	0.2%	1	0.0%	0	0.0%	0	0.0%	0
Difficult to park / lack of parking	0.1%	1	1.0%	0	0.0%	0	0.6%	0
It's expensive there	0.1%	0	0.0%	0	0.0%	0	1.0%	0
Doesn't have an M&S store	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hard to get to by car	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor layout / difficult to get around	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor service in the cafes	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Too many tourists	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing, no reason to visit)	59.8%	249	56.9%	24	60.1%	34	56.2%	23
(Don't know)	2.7%	11	0.0%	0	7.7%	4	0.0%	0
Weighted base:		416		42		56		40
Sample:		379		53		39		47
								22
								57
								44
								154
								62

**Q35 Which of the following, if any, methods of electronic home shopping do you use? [MR/PR]**

Internet	48.9%	342	41.9%	30	47.1%	57	51.7%	44	49.7%	15	46.2%	39	37.7%	32	56.1%	127
Portable Internet shopping (through mobile phone)	48.0%	336	54.9%	39	46.8%	56	45.6%	39	51.5%	15	49.9%	42	34.6%	29	51.2%	116
TV Shopping	3.1%	22	4.6%	3	4.3%	5	3.3%	3	3.0%	1	0.9%	1	2.9%	2	2.9%	7
(None of these)	26.9%	189	28.2%	20	27.3%	33	29.8%	25	16.4%	5	29.0%	24	35.7%	30	22.6%	51
Weighted base:		700		71		120		85		30		83		84		227
Sample:		700		100		100		100		100		100		100		100

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
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**Q36 Which goods or services do you currently purchase via electronic (home / mobile) shopping? [MR]**

Those who said 'Internet', 'Portable Internet shopping (through mobile phone)' or 'TV Shopping' at Q35

Baby items	5.6%	29	3.6%	2	9.6%	8	2.6%	2	22.3%	6	13.8%	8	5.6%	3	0.0%	0
Banking / finance	21.4%	110	27.6%	14	10.3%	9	9.9%	6	18.3%	5	23.1%	14	24.1%	13	28.2%	49
Batteries	2.1%	11	0.0%	0	0.7%	1	3.7%	2	3.2%	1	1.9%	1	3.3%	2	2.3%	4
Books	14.5%	74	20.0%	10	14.9%	13	9.8%	6	14.4%	4	5.2%	3	17.2%	9	16.6%	29
Car parts / products	4.4%	22	12.4%	6	3.1%	3	0.0%	0	0.0%	0	4.3%	3	3.3%	2	5.1%	9
CDs, DVDs, Vinyl (physical products)	3.2%	16	3.5%	2	2.1%	2	3.7%	2	2.0%	1	5.6%	3	6.5%	4	1.7%	3
Cleaning products	10.9%	56	6.9%	4	9.0%	8	9.2%	5	15.6%	4	20.3%	12	11.9%	6	9.5%	17
Clothes	56.2%	287	44.2%	23	75.5%	66	61.1%	36	73.1%	18	71.0%	42	62.3%	34	39.1%	69
Computer / printer accessories	5.6%	29	8.0%	4	0.0%	0	1.9%	1	2.4%	1	0.0%	0	0.0%	0	13.0%	23
Console / PC games	4.5%	23	7.2%	4	2.1%	2	6.1%	4	8.9%	2	11.1%	7	3.5%	2	1.7%	3
Craft / hobby items	5.8%	30	6.7%	3	5.1%	4	8.9%	5	7.2%	2	3.4%	2	6.5%	4	5.2%	9
DIY goods	10.5%	54	5.8%	3	7.1%	6	11.2%	7	10.8%	3	12.5%	7	4.4%	2	14.5%	25
Downloadable / streamed content (e.g. music / movies / tv / games / apps)	7.0%	36	9.5%	5	3.1%	3	0.0%	0	8.7%	2	18.6%	11	6.8%	4	6.4%	11
Food	18.2%	93	16.6%	8	13.2%	12	18.6%	11	27.6%	7	22.8%	14	11.0%	6	20.4%	36
Furniture / Carpets	10.6%	54	0.8%	0	15.1%	13	11.4%	7	10.9%	3	21.8%	13	13.4%	7	6.4%	11
Garden items	8.1%	42	1.6%	1	7.2%	6	1.3%	1	6.8%	2	17.5%	10	8.6%	5	9.7%	17
Gifts	8.5%	43	7.3%	4	3.5%	3	3.7%	2	3.4%	1	14.8%	9	12.4%	7	10.3%	18
Health / beauty / cosmetic / toiletry items	21.0%	107	23.2%	12	12.5%	11	19.1%	11	17.8%	4	34.5%	20	22.4%	12	20.7%	36
Holiday and / or Travel Tickets	19.7%	101	33.2%	17	5.0%	4	8.8%	5	16.3%	4	18.8%	11	9.7%	5	30.7%	54
Jewellery	3.6%	18	0.0%	0	0.0%	0	1.3%	1	16.4%	4	3.3%	2	0.0%	0	6.5%	11
Major electrical items	10.8%	55	6.6%	3	10.3%	9	8.2%	5	35.2%	9	17.7%	10	16.6%	9	5.6%	10
Mobile phone / tablet / pad accessories	16.6%	85	12.9%	7	11.1%	10	8.3%	5	8.8%	2	15.8%	9	12.4%	7	25.8%	45
Pet products	3.7%	19	5.8%	3	8.0%	7	6.1%	4	5.6%	1	6.2%	4	0.8%	0	0.0%	0
Photographs	1.7%	9	3.5%	2	0.0%	0	3.0%	2	1.7%	0	2.8%	2	0.0%	0	1.7%	3
Shoes	15.1%	77	11.4%	6	10.6%	9	12.5%	7	19.1%	5	34.5%	20	16.5%	9	11.7%	20
Small electrical items	28.4%	145	27.5%	14	24.4%	21	32.7%	19	34.3%	8	44.0%	26	29.1%	16	22.8%	40
Small household goods	23.1%	118	13.3%	7	23.3%	20	24.4%	15	40.7%	10	39.9%	24	25.9%	14	16.5%	29
Sports goods	9.2%	47	0.0%	0	0.0%	0	13.4%	8	7.2%	2	14.7%	9	10.1%	5	13.1%	23
Stationery	5.6%	29	5.8%	3	3.1%	3	6.8%	4	4.8%	1	5.6%	3	6.8%	4	6.3%	11
Takeaway food	25.3%	130	26.5%	14	12.1%	11	14.3%	9	20.7%	5	22.8%	14	13.6%	7	40.4%	71
Toys	23.2%	119	14.1%	7	36.3%	32	31.5%	19	41.4%	10	37.4%	22	25.2%	14	8.5%	15
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alcohol	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Farm products	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0
Lottery / bingo	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0	0.0%	0
Transport (e.g. taxi apps)	0.4%	2	3.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Vapes / vaping accessories	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Vehicle parts	0.3%	2	0.0%	0	0.7%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
(Don't know / varies)	6.3%	32	2.5%	1	3.5%	3	18.5%	11	14.1%	3	5.0%	3	10.0%	5	2.9%	5
Weighted base:		512		51		87		59		25		59		54		175
Sample:		428		58		64		56		74		56		53		67

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7								
<b>Q37 What, if anything, would change your internet / electronic shopping preferences in the next 3 - 5 years? [MR/PR]</b>																
<i>Those who said 'Internet', 'Portable Internet shopping (through mobile phone)' or 'TV Shopping' at Q35</i>																
Improved broadband	26.0%	133	18.6%	10	25.9%	23	24.7%	15	25.7%	6	32.5%	19	28.4%	15	25.9%	45
More / nearer click and collect services	14.4%	74	22.3%	11	14.4%	13	10.3%	6	1.0%	0	15.6%	9	15.8%	9	14.5%	25
Increased local collection points	22.4%	115	37.5%	19	24.1%	21	22.0%	13	6.2%	2	20.9%	12	20.6%	11	20.6%	36
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Being able to see what I'm buying more clearly	0.1%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheaper broadband	0.5%	2	3.5%	2	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easier to return items	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Faster deliveries	0.7%	4	0.0%	0	2.1%	2	3.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Free click and collect	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0
Free delivery	1.0%	5	0.0%	0	0.0%	0	1.9%	1	0.0%	0	1.8%	1	0.0%	0	1.7%	3
Higher online prices would discourage me to shop online	0.3%	1	2.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lower online prices would encourage me to shop online	1.6%	8	3.5%	2	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.8%	0	2.4%	4
More reliable delivery service	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0
More TV shopping channels (Don't know)	0.1%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing)	14.4%	73	13.4%	7	5.1%	4	11.2%	7	15.8%	4	9.2%	5	20.7%	11	19.9%	35
Weighted base:		512		51		87		59		25		59		54		175
Sample:		428		58		64		56		74		56		53		67

We now have a few questions about a range of different social and leisure activities.

**Q38 Which of these leisure activities do you participate in? [MR/PR]**

Indoor sports or health and fitness activity	21.5%	151	21.4%	15	27.8%	33	13.0%	11	14.1%	4	12.1%	10	18.5%	15	27.0%	61
Cinema	28.7%	201	30.8%	22	35.6%	43	25.9%	22	28.1%	8	24.4%	20	28.5%	24	27.2%	62
Restaurant	55.1%	385	58.1%	42	66.2%	80	55.5%	47	44.3%	13	48.7%	41	49.0%	41	54.0%	122
Pub / bars	24.7%	173	30.5%	22	28.1%	34	15.5%	13	22.6%	7	16.8%	14	10.1%	8	33.0%	75
Nightclub	2.3%	16	10.2%	7	2.1%	3	0.0%	0	0.0%	0	1.4%	1	0.0%	0	2.3%	5
Social club	3.2%	22	3.6%	3	2.4%	3	3.8%	3	1.3%	0	4.6%	4	1.0%	1	3.9%	9
Ten pin bowling	12.3%	86	8.4%	6	19.1%	23	11.8%	10	2.7%	1	4.5%	4	13.9%	12	13.6%	31
Swimming	17.1%	119	10.0%	7	19.9%	24	16.4%	14	15.8%	5	20.1%	17	19.6%	16	16.1%	37
Theatre / concert hall	22.5%	157	18.1%	13	25.2%	30	21.2%	18	17.3%	5	17.8%	15	18.1%	15	26.9%	61
Museum / art galleries	14.4%	101	11.1%	8	20.6%	25	17.4%	15	10.6%	3	10.7%	9	12.7%	11	13.4%	30
Outdoor activities (such as jogging / running / cycling / 11-a-side football etc.)	21.4%	150	23.5%	17	18.3%	22	19.0%	16	15.4%	5	14.3%	12	18.0%	15	28.0%	63
(None mentioned)	22.5%	158	12.8%	9	18.5%	22	23.7%	20	26.6%	8	30.5%	25	29.0%	24	21.4%	48
Weighted base:		700		71		120		85		30		83		84		227
Sample:		700		100		100		100		100		100		100		100

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
<b>Q39 Which centre / facility did you last visit for indoor sports or health and fitness activity?</b>								
<i>Those that said 'Indoor sports or health and fitness activity' at Q38 AND Excl. Nulls &amp; SFT</i>								
<b>Zone 1</b>								
Bethany Community Centre, Irish Green Street, Limavady, BT49 9AB	0.3%	0	2.6%	0	0.0%	0	0.0%	0
Dungiven Town Centre	1.5%	2	14.4%	2	0.0%	0	0.0%	0
Limavady Town Centre	3.4%	5	14.8%	2	8.0%	3	0.0%	0
Roe Valley Intergrated Primary School, Ballyquin Road, Limavady, BT49 9ET	0.3%	0	2.6%	0	0.0%	0	0.0%	0
Roe Valley Leisure Centre, Greystone Road, Limavady	6.2%	9	53.4%	8	0.0%	0	0.0%	0
<b>Zone 2</b>								
Coleraine Leisure Centre, Railway Road, Coleraine	10.3%	15	12.2%	2	39.2%	13	0.0%	0
Coleraine Town Centre	0.4%	1	0.0%	0	1.7%	1	0.0%	0
Core Gym, Ballyrashane Road, Coleraine	1.8%	3	0.0%	0	8.0%	3	0.0%	0
Evolution Gym NI, Somerset House, Somerset Road, Coleraine, BT51 3LL	1.8%	3	0.0%	0	8.0%	3	0.0%	0
Pure Gym, Riverside Park North, Coleraine, BT51 3GE	1.7%	2	0.0%	0	7.3%	2	0.0%	0
University of Ulster Sports Centre, Cromore Road, Coleraine	2.9%	4	0.0%	0	0.0%	0	0.0%	0
<b>Zone 3</b>								
Ballymoney Town Centre	2.6%	4	0.0%	0	0.0%	0	33.9%	4
Joey Dunlop Leisure Centre, Garryduff Road, Ballymoney	6.9%	10	0.0%	0	12.4%	4	54.4%	6
<b>Zone 4</b>								
Ballycastle Town Centre	0.3%	0	0.0%	0	0.0%	0	0.0%	0
Cushendall Village Centre	0.7%	1	0.0%	0	0.0%	0	30.5%	1
Glenariff Community and Recreation Centre, Garron Road, Glenariff, Ballymena, BT44 0RB	0.3%	1	0.0%	0	0.0%	0	14.1%	1
Sheskburn Recreation Centre, Mary Street, Ballycastle	0.6%	1	0.0%	0	0.0%	0	24.9%	1
<b>Zone 5</b>								
Ballymena North Business & Recreation Centre, Cushendall Road, Ballymena, BT43 6HB	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Ballymena Town Centre	1.5%	2	0.0%	0	0.0%	0	15.2%	1
Cullybackey Village Centre	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Seven Towers Leisure Centre, Trostan Avenue, Ballymena	2.7%	4	0.0%	0	0.0%	0	0.0%	0
The Gallgorm Club, Fenagh Road, Ballymena, BT42 1PY	0.9%	1	0.0%	0	0.0%	0	11.7%	1
<b>Zone 6</b>								
Curves, Station Road Industrial Estate, Magherafelt, BT45 5EY	1.1%	2	0.0%	0	0.0%	0	0.0%	0
Greenvale Leisure Centre, Market Street, Magherafelt	4.0%	6	0.0%	0	0.0%	0	0.0%	0
Maghera Leisure Centre, Coleraine Road, Maghera	1.5%	2	0.0%	0	1.7%	1	0.0%	0
Maghera Town Centre	1.3%	2	0.0%	0	5.6%	2	0.0%	0
Magherafelt Town Centre	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Meadowbank Sports Arena, Ballyronan Road, Magherafelt	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Tobermore Village Centre	0.8%	1	0.0%	0	0.0%	0	0.0%	0
<b>Zone 7</b>								

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7		
City Baths, William Street, Londonderry	2.9%	4	0.0%	0	0.0%	0	0.0%	0	7.2%	4
Eglinton Village Centre	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Everlast Gym, Crescent Link Retail Park, Crescent Link, Belfast, BT47 5FR	1.8%	3	0.0%	0	0.0%	0	0.0%	0	4.6%	3
Foyle Arena, Limavady Road, Londonderry	9.3%	14	0.0%	0	0.0%	0	0.0%	0	23.2%	14
Londonderry City Centre	9.5%	14	0.0%	0	0.0%	0	0.0%	0	23.6%	14
Pure Gym, Lesley Retail Park, Strand Road, Londonderry, BT48 7PW	4.9%	7	0.0%	0	0.0%	0	0.0%	0	12.3%	7
Springtown Industrial Estate, Springtown Road, Derry / Londonderry, BT48 0LY	2.8%	4	0.0%	0	0.0%	0	0.0%	0	7.0%	4
White Horse Hotel, Clooney Road, Campsie, Londonderry, BT47 3PA	2.0%	3	0.0%	0	0.0%	0	0.0%	0	5.1%	3
<b>Outside Survey Area</b>										
David Lloyd, Old Dundonald Road, Belfast, BT16 1DL	1.8%	3	0.0%	0	8.0%	3	0.0%	0	0.0%	0
JD Gyms, Larne Road Retail Park, Pennybridge Industrial Estate, Ballymena, BT42 3HB	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Larne Leisure Centre, Tower Road, Antrim, Larne	0.1%	0	0.0%	0	0.0%	0	3.6%	0	0.0%	0
Olympia Leisure Centre and Spa, Boucher Road, Belfast, BT12 6HR	1.3%	2	0.0%	0	0.0%	0	0.0%	0	12.0%	2
Strabane Town Centre	2.7%	4	0.0%	0	0.0%	0	0.0%	0	6.6%	4
Weighted base:	146		15	33	11	4	8	15	59	
Sample:	102		14	21	10	15	8	14	20	

**Meanscore: [Number of visits per month]****Q40 How often do you visit FACILITY MENTIONED AT Q39 for indoor sports or health and fitness activities?**

Those that said 'Indoor sports or health and fitness activity' at Q38

Daily	10.8%	16	0.0%	0	21.6%	7	16.8%	2	0.0%	0	23.0%	2	8.4%	1	5.9%	4
At least two times a week	37.2%	56	30.5%	5	45.1%	15	46.8%	5	56.5%	2	26.8%	3	30.2%	5	35.0%	21
At least once a week	18.5%	28	10.6%	2	18.5%	6	10.5%	1	29.2%	1	19.4%	2	29.8%	5	18.1%	11
At least once a fortnight	13.0%	20	12.2%	2	6.8%	2	10.5%	1	0.0%	0	0.0%	0	2.6%	0	22.8%	14
At least once a month	9.9%	15	22.4%	3	8.0%	3	3.6%	0	0.0%	0	15.1%	2	0.0%	0	11.3%	7
At least every two months	1.2%	2	12.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
At least every 3 months	5.1%	8	0.0%	0	0.0%	0	11.7%	1	0.0%	0	0.0%	0	14.2%	2	6.9%	4
At least every 6 months	1.5%	2	12.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	0	0.0%	0
Less often than once every 6 months	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Have only visited once (Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:	7.32		3.42		10.61		9.14		6.64		11.28		6.90		5.76	
Weighted base:	151		15		33		11		4		10		15		61	
Sample:	105		14		21		10		16		9		14		21	

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
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**Q41 Which cinema did you last visit?**

Those that said 'Cinema' at Q38 AND Excl. Nulls &amp; SFT

**Zone 2**

Movie House Coleraine, Jet Centre, Riverside Park, Coleraine	39.0%	76	77.4%	17	88.6%	38	72.7%	16	21.4%	2	0.0%	0	4.9%	1	4.5%	3
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The Playhouse Portrush, Main Street, Portrush	0.3%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
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**Zone 6**

Movie House Cinema Maghera, St Lurachs Road, Maghera	8.1%	16	7.7%	2	5.7%	2	0.0%	0	0.0%	0	0.0%	0	48.8%	12	0.0%	0
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**Zone 7**

Brunswick Moviebowl, Brunswick Lane, Pennyburn Industrial Estate, Londonderry	17.2%	34	11.2%	2	0.0%	0	5.9%	1	0.0%	0	0.0%	0	0.0%	0	51.1%	30
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Omniplex Cinema Derry, Quayside Shopping Centre, Londonderry	11.3%	22	3.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	36.2%	21
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**Outside Survey Area**

Eclipse Cinema, Station Road, Lifford, F93 NX99	0.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	2
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IMC Cinema Ballymena, Larne Road Link, Ballymena	15.6%	31	0.0%	0	4.4%	2	21.4%	5	69.5%	5	83.5%	16	0.0%	0	5.0%	3
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Odeon, Victoria Square, Belfast, BT1 4QG	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	1	1.7%	0	0.0%	0
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Omniplex Cinema Antrim, Junction One Retail Park, Antrim	1.1%	2	0.0%	0	0.0%	0	0.0%	0	1.7%	0	1.9%	0	7.2%	2	0.0%	0
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Omniplex Cinema Larne, Port of Larne Leisure Park, Larne	1.1%	2	0.0%	0	0.0%	0	0.0%	0	7.4%	1	8.5%	2	0.0%	0	0.0%	0
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Omniplex Cinema Omagh, Kevlin Road, Omagh	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
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The Ritz Multiplex, Burn Road, Cookstown	4.4%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	35.7%	9	0.0%	0
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Weighted base:	196	22		43		22		8		19		24		59		
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Sample:	168	22		33		21		22		20		25		25		
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**Meanscore: [Number of visits per month]****Q42 How often do you visit CINEMA MENTIONED AT Q41?**

Those that said 'Cinema' at Q38

Daily	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
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At least two times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
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At least once a week	1.1%	2	0.0%	0	5.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
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At least once a fortnight	2.0%	4	0.0%	0	1.4%	1	1.8%	0	0.0%	0	1.8%	0	0.0%	0	4.3%	3
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At least once a month	16.2%	32	38.9%	9	18.6%	8	1.8%	0	3.1%	0	0.0%	0	10.4%	2	20.8%	13
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At least every two months	19.2%	39	7.7%	2	11.7%	5	24.7%	5	17.4%	1	10.7%	2	3.4%	1	35.8%	22
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At least every 3 months	19.3%	39	32.0%	7	27.3%	12	9.5%	2	13.4%	1	9.2%	2	8.3%	2	21.0%	13
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At least every 6 months	17.6%	35	9.6%	2	8.4%	4	26.4%	6	14.0%	1	30.7%	6	41.5%	10	10.6%	7
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Less often than once every 6 months	16.6%	33	10.0%	2	23.0%	10	13.6%	3	32.9%	3	34.2%	7	16.7%	4	7.5%	5
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Have only visited once (Don't know / varies)	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0	0.0%	0
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Mean:	0.49		0.56		0.63		0.35		0.27		0.25		0.31		0.57	
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Weighted base:	201	22		43		22		8		20		24		62		
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Sample:	171	22		33		21		23		21		25		26		
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Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
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**Q43 Which centre / facility did you last visit to go to a restaurant?**

Those that said 'Restaurant' at Q38 AND Excl. Nulls &amp; SFT

**Zone 1**

Ballykelly Village Centre	0.9%	3	8.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Drenagh Estate, Dowland Road, Limavady, BT49 0HP	0.4%	1	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Dungiven Town Centre	0.3%	1	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Limavady Town Centre	5.9%	21	35.1%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.5%	7
Roe Valley Country Park, Dogleap Road, Limavady, BT49 9NN	0.1%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Point Bar and Restaurant, Point Road, Magilligan Point, Limavady, BT49 0LR	0.6%	2	5.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Ponderosa, Glenshane Road, Londonderry, BT47 4SD	0.2%	1	1.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0

**Zone 2**

Bushmills Village Centre	1.6%	6	0.0%	0	6.0%	5	1.9%	1	0.0%	0	0.9%	0	0.0%	0
Bushtown Hotel, Drumcroon Road, Coleraine, BT51 3QT	0.2%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Castlerock Golf Club, Circular Road, Coleraine, BT51 4TJ	0.3%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Castlerock Village Centre	0.2%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coleraine Town Centre	10.3%	37	9.4%	4	32.4%	25	11.9%	5	2.1%	0	3.5%	1	5.1%	2
Cromore Halt Guest Inn, Station Road, Portstewart, BT55 7PU	0.5%	2	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elephant Rock Hotel, Lansdowne Crescent, Portrush, BT56 8AY	0.4%	1	0.0%	0	0.0%	0	3.0%	1	0.0%	0	0.0%	0	0.0%	0
Garvagh Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kilrea Village Centre	0.3%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	0
Portballintrae Village Centre	0.2%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Portrush Town Centre	9.7%	35	2.0%	1	22.4%	17	21.8%	9	0.0%	0	9.3%	4	1.1%	0
Portstewart Town Centre	2.8%	10	2.0%	1	9.7%	7	0.9%	0	2.1%	0	0.0%	0	1.1%	1
Riverside Retail Park (& The Jet Centre), Coleraine, BT51 3QQ	1.8%	6	5.7%	2	4.0%	3	0.0%	0	0.0%	0	2.6%	1	0.0%	0

Royal Court Hotel, Ballybogey Road, Portrush, BT56 8NF	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0
Strawberry Fayre Tea Room and Bakery, Blagh Road, Coleraine, BT52 2PG	0.1%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0
The Lodge Hotel, Lodge Road Roundabout, Coleraine, BT52 1NF	0.8%	3	0.0%	0	2.3%	2	1.9%	1	0.0%	0	0.9%	0	0.0%	0
The Tides Restaurant, Ballyreagh Road, Portrush, BT56 8LR	0.7%	3	0.0%	0	3.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Two Twenty, Ballybogey Road, Portrush, BT56 8NE	0.2%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0

**Zone 3**

Armagh Village Centre	0.2%	1	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0
Ballybogey Village Centre	0.1%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0
Ballymoney Town Centre	1.8%	6	0.0%	0	0.0%	0	13.8%	6	4.1%	1	0.0%	0	0.0%	0
Cloughmills Village Centre	0.6%	2	0.0%	0	0.0%	0	5.4%	2	0.0%	0	0.0%	0	0.0%	0
Dunloy Village Centre	0.4%	1	0.0%	0	0.0%	0	3.0%	1	0.0%	0	0.0%	0	0.0%	0
Portglenone Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0
Stranocum Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0

**Zone 4**

Ballycastle Town Centre	2.2%	8	0.0%	0	0.8%	1	9.1%	4	28.6%	4	0.0%	0	0.0%	0
Carnlough Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0
Cushendall Village Centre	0.9%	3	0.0%	0	0.0%	0	0.0%	0	26.3%	3	0.0%	0	0.0%	0
Cushendun Village Centre	0.1%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0
Glenarm Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	7.1%	1	0.0%	0	0.0%	0
The Salthouse Hotel, Dunamallagh Road,	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7								
Ballycastle, BT54 6PF																
<b>Zone 5</b>																
Ballymena Town Centre	8.1%	29	3.3%	1	6.4%	5	5.5%	2	13.6%	2	46.0%	18	2.1%	1	0.0%	0
Broughshane Village Centre	0.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.9%	3	0.0%	0	0.0%	0
Galgorm Castle Golf Club, Galgorm Road, Ballymena, BT42 1HL	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0
Tullyglass Hotel, Galgorm Road, Ballymena, BT42 1HJ	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
<b>Zone 6</b>																
Ardtara Country House, Gorteade Road, Upperlands, BT46 5SA	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0
Bellaghy Village Centre	0.8%	3	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	6.1%	2	0.0%	0
Castledawson Town Centre	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	2	0.0%	0
Draperstown Town Centre	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	2	0.0%	0
Maghera Town Centre	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.5%	2	0.0%	0
Magherafelt Town Centre	3.9%	14	0.0%	0	0.0%	0	0.9%	0	0.0%	0	2.9%	1	32.1%	12	0.0%	0
Swatragh Village Centre	0.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.4%	2	0.8%	1
<b>Zone 7</b>																
Bishop's Gate Hotel, Bishop Street, Londonderry, BT48 6PP	1.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	4		
Crescent Link Retail Park, Londonderry, BT47 6SA	2.9%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.3%	10		
Eglinton Village Centre	1.5%	6	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	5		
Londonderry City Centre	17.6%	63	18.2%	7	0.0%	0	3.0%	1	0.0%	0	0.0%	0	0.0%	0	49.6%	55
The Cosh Bar, Buncrana Road, Coshquin, Londonderry, BT48 8LB	0.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	3		
The Waterfoot Hotel, Clooney Road, Londonderry, BT47 6TB	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1		
Waterside Local Centre, Londonderry, BT47 5RS	0.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	3		
<b>Outside Survey Area</b>																
Antrim Town Centre	0.8%	3	0.0%	0	0.0%	0	0.9%	0	0.0%	0	5.8%	2	0.0%	0	0.0%	0
Ballygally Village Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	4.1%	1	0.9%	0	1.1%	0	0.0%	0
Bangor City Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Belfast City Centre	3.3%	12	0.0%	0	3.2%	2	6.4%	3	3.1%	0	3.8%	2	7.5%	3	1.7%	2
Carrickfergus Town Centre	0.3%	1	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London / West End	0.5%	2	0.0%	0	0.0%	0	4.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cookstown Town Centre	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	2	0.0%	0
Donegal Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Dungloe Town Centre	0.1%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gracehill Village Centre	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	2	0.0%	0	0.0%	0
Larne Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	5.8%	1	0.0%	0	0.0%	0	0.0%	0
Leighinmohr House Hotel, Leighinmohr Avenue, Ballymena, BT42 2AN	0.2%	1	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Lifford Town Centre	0.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	3		
Moville Town Centre, Ireland	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0
Newbridge Road, Coleraine	0.5%	2	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	3.0%	1	0.0%	0
Omagh Town Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0
Portnablagh Village Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Redcastle Hotel, Inishowen Peninsula, Redcastle, F93 Y660	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Rossspark Hotel Kells, Doagh Road, Kells, Ballymena, BT42 3LZ	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Strabane Town Centre	1.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	5
Templepatrick Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0
The Boathouse, Lough Road, Antrim, BT41 4DQ	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
The Rabbit Hotel, Antrim Road, Templepatrick, Ballyclare, BT39 0AH	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
The Railway Tavern, Main Street, Castlefin, County Donegal, F93 VE02	0.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	3		

Weighted base:

361

40

76

43

12

40

39

111

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7								
Sample:	418	67	69	60	55	57	52	58								
<b>Meanscore: [Number of visits per month]</b>																
<b>Q44 How often do you visit FACILITY MENTIONED AT Q43 to visit a restaurant?</b>																
<i>Those that said 'Restaurant' at Q38</i>																
Daily	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1				
At least two times a week	0.5%	2	2.9%	1	0.7%	1	0.0%	0	1.0%	0	0.0%	0	0.0%	0		
At least once a week	6.4%	25	5.7%	2	2.8%	2	9.8%	5	11.5%	2	7.1%	3	7.1%	8		
At least once a fortnight	17.0%	66	14.2%	6	14.1%	11	12.0%	6	10.7%	1	16.9%	7	12.0%	30		
At least once a month	23.6%	91	17.1%	7	16.1%	13	35.3%	17	24.8%	3	20.0%	8	25.1%	10	26.6%	33
At least every two months	14.3%	55	16.8%	7	19.9%	16	11.5%	5	20.1%	3	19.8%	8	17.7%	7	7.2%	9
At least every 3 months	12.9%	50	13.9%	6	11.0%	9	10.5%	5	11.8%	2	15.7%	6	24.5%	10	10.0%	12
At least every 6 months	9.1%	35	16.2%	7	14.3%	11	7.3%	3	3.9%	1	12.7%	5	2.0%	1	5.7%	7
Less often than once every 6 months	7.3%	28	4.9%	2	6.5%	5	5.1%	2	6.8%	1	0.9%	0	3.0%	1	13.2%	16
Have only visited once (Don't know / varies)	3.6%	14	2.9%	1	5.7%	5	4.4%	2	3.8%	1	0.9%	0	5.7%	2	2.3%	3
Weighted base:	385		42		80		47		13		41		41		122	
Sample:	439		68		72		64		57		59		56		63	
Mean:		1.18		1.18		0.92		1.20		1.27		1.07		1.03		1.40

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7						
<b>Q45 Which centre / facility did you last visit to go to bars, pubs and nightclubs or social clubs?</b>														
<i>Those that said 'Pub / bars', 'Nightclub' or 'Social club' at Q38 AND Excl. Nulls &amp; SFT</i>														
<b>Zone 1</b>														
Claudy Village Centre	0.8%	1	5.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dungiven Town Centre	1.0%	2	7.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Limavady Town Centre	9.0%	15	63.4%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Park Village Centre	0.2%	0	1.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Point Bar and Restaurant, Point Road, Magilligan Point, Limavady, BT49 0LR	0.2%	0	1.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
<b>Zone 2</b>														
Bushmills Village Centre	1.0%	2	0.0%	0	5.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coleraine Town Centre	6.6%	11	0.0%	0	12.8%	4	4.0%	0	0.0%	0	6.4%	1	0.0%	0
Garvagh Village Centre	1.1%	2	0.0%	0	5.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenullin Village Centre	1.1%	2	0.0%	0	5.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kilrea Village Centre	0.3%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Portrush Town Centre	10.4%	18	0.0%	0	44.3%	15	19.3%	2	0.0%	0	6.4%	1	0.0%	0
Portstewart Golf Club, Strand Road, Portstewart, BT55 7PG	1.5%	3	0.0%	0	7.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Portstewart Town Centre	2.1%	4	0.0%	0	10.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Royal Court Hotel, Ballybogey Road, Portrush, BT56 8NF	0.2%	0	1.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
<b>Zone 3</b>														
Armagh Village Centre	0.7%	1	0.0%	0	0.0%	0	12.7%	1	0.0%	0	0.0%	0	0.0%	0
Ballymoney Town Centre	1.7%	3	4.8%	1	0.0%	0	16.6%	2	0.0%	0	0.0%	0	0.0%	0
Stranocum Village Centre	0.2%	0	0.0%	0	0.0%	0	4.0%	0	0.0%	0	0.0%	0	0.0%	0
<b>Zone 4</b>														
Ballycastle Town Centre	1.7%	3	0.0%	0	0.0%	0	16.6%	2	17.8%	1	0.0%	0	0.0%	0
Carlough Village Centre	0.6%	1	0.0%	0	0.0%	0	0.0%	0	14.7%	1	0.0%	0	0.0%	0
Cushendall Golf Club, Shore Road, Cushendall, BT44 0NG	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0
Cushendall Village Centre	1.0%	2	0.0%	0	0.0%	0	0.0%	0	25.7%	2	0.0%	0	0.0%	0
Glenarm Village Centre	0.5%	1	0.0%	0	0.0%	0	0.0%	0	13.1%	1	0.0%	0	0.0%	0
Waterfoot Village Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	11.1%	1	0.0%	0	0.0%	0
<b>Zone 5</b>														
Ballymena Town Centre	5.2%	9	0.0%	0	0.0%	0	15.4%	2	7.5%	1	42.3%	7	0.0%	0
Broughshane Village Centre	1.4%	2	0.0%	0	0.0%	0	0.0%	0	15.1%	2	0.0%	0	0.0%	0
<b>Zone 6</b>														
Castledawson Town Centre	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.6%	1	0.0%	0
Maghera Town Centre	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	0	0.0%	0
Magherafelt Town Centre	2.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	47.9%	4	0.0%	0
Plumbridge Village Centre	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.2%	1	0.0%	0
Swatragh Village Centre	0.3%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
<b>Zone 7</b>														
Crescent Link Retail Park, Londonderry, BT47 6SA	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Donemana Cricket Club, Duncastle Road, Donemana, Strabane, BT82 0LR	2.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	4
Donemana Village Centre	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Eglington Village Centre	5.4%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.8%	9
Londonderry City Centre	29.6%	51	14.6%	4	5.0%	2	0.0%	0	0.0%	0	0.0%	0	62.5%	46
Waterside Local Centre, Londonderry, BT47 5RS	1.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	3
<b>Outside Survey Area</b>														
Antrim Town Centre	1.0%	2	0.0%	0	0.0%	0	0.0%	0	10.2%	2	0.0%	0	0.0%	0
Belfast City Centre	5.4%	9	0.0%	0	0.0%	0	11.4%	1	0.0%	0	17.4%	3	16.2%	1
Cookstown Town Centre	0.2%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	0	0.0%	0	0.0%	0
Leighinmohr House Hotel, Leighinmohr Avenue, Ballymena, BT42 2AN	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	0	0.0%	0
Newtownards Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0
Weighted base:	172		24	34	10	7	16	8					73	
Sample:	143		24	23	13	26	22	8					27	

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
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**Meanscore: [Number of visits per month]****Q46 How often do you visit FACILITY MENTIONED AT Q45 for bars, pubs, nightclubs or social clubs?**

Those that said 'Pub / bars', 'Nightclub' or 'Social club' at Q38

Daily	2.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.5%	4
At least two times a week	10.4%	19	14.3%	3	17.6%	6	0.0%	0	3.9%	0	6.1%	1	4.6%	0
At least once a week	14.8%	27	37.8%	9	13.7%	5	11.2%	2	10.1%	1	10.0%	2	0.0%	0
At least once a fortnight	12.9%	24	16.6%	4	29.6%	10	7.7%	1	10.5%	1	13.5%	2	4.6%	0
At least once a month	24.1%	44	5.3%	1	10.5%	4	15.6%	2	36.8%	2	29.2%	5	47.3%	4
At least every two months	11.5%	21	14.6%	4	7.1%	2	2.7%	0	21.2%	1	6.6%	1	21.1%	2
At least every 3 months	7.7%	14	1.7%	0	4.9%	2	27.3%	4	1.9%	0	12.5%	2	17.8%	2
At least every 6 months	4.5%	8	6.4%	2	0.0%	0	12.2%	2	1.9%	0	8.2%	1	4.6%	0
Less often than once every 6 months	0.5%	1	1.7%	0	0.0%	0	0.0%	0	8.1%	1	0.0%	0	0.0%	0
Have only visited once (Don't know / varies)	2.6%	5	1.7%	0	7.8%	3	8.5%	1	5.6%	0	0.0%	0	0.0%	0
	8.6%	16	0.0%	0	8.8%	3	14.8%	2	0.0%	0	13.9%	2	0.0%	0
Mean:		2.99		3.19		3.24		1.14		1.50		1.79		1.10
Weighted base:		184		24		34		15		7		18		9
Sample:		152		24		24		16		26		24		10
														77
														28

**Q47 Which centre / facility did you last visit to go ten-pin bowling?**

Those that said 'Ten pin bowling' at Q38 AND Excl. Nulls &amp; SFT

<b>Zone 2</b>														
The Jet Centre, Riverside Park South, Coleraine	63.6%	48	64.8%	4	89.4%	21	100.0%	8	100.0%	1	100.0%	4	88.8%	9
<b>Zone 7</b>														
Brunswick Moviebowl, Brunswick Lane, Pennyburn Industrial Estate, Londonderry	32.3%	24	35.2%	2	2.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
<b>Outside Survey Area</b>														
Cookstown Leisure Centre, Fountain Road, Cookstown	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.2%	1	0.0%	0
Hollywood Bowl, Queens Quay, Belfast, BT3 9QQ	2.5%	2	0.0%	0	8.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		75		6		23		8		1		4		11
Sample:		62		9		16		8		4		3		12
														22
														10

**Meanscore: [Number of visits per month]****Q48 How often do you visit FACILITY MENTIONED AT Q47 to go ten-pin bowling?**

Those that said 'Ten pin bowling' at Q38

Daily	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
At least two times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
At least once a week	0.5%	0	6.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
At least once a fortnight	2.2%	2	0.0%	0	8.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
At least once a month	6.3%	5	0.0%	0	0.0%	0	12.9%	1	0.0%	0	0.0%	0	10.0%	1
At least every two months	22.1%	19	13.5%	1	25.8%	6	0.0%	0	0.0%	0	0.0%	0	20.1%	2
At least every 3 months	11.6%	10	31.0%	2	20.5%	5	17.0%	2	16.1%	0	42.1%	2	0.0%	0
At least every 6 months	20.0%	17	6.8%	0	21.3%	5	32.6%	3	51.7%	0	57.9%	2	21.2%	2
Less often than once every 6 months	23.9%	21	35.2%	2	21.8%	5	24.6%	2	32.2%	0	0.0%	0	41.7%	5
Have only visited once (Don't know / varies)	2.0%	2	6.8%	0	0.0%	0	12.9%	1	0.0%	0	0.0%	0	0.0%	0
	11.5%	10	0.0%	0	2.5%	1	0.0%	0	0.0%	0	0.0%	0	7.0%	1
Mean:		0.39		0.51		0.43		0.31		0.18		0.24		0.31
Weighted base:		86		6		23		10		1		4		12
Sample:		67		9		16		10		4		3		13
														31
														12

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
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**Q49 Which centre / facility did you last visit to go swimming?**

Those that said 'Swimming' at Q38 AND Excl. Nulls &amp; SFT

**Zone 1**

Limavady Town Centre	0.4%	0	8.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Roe Valley Leisure Centre, Greystone Road, Limavady	2.8%	3	55.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

**Zone 2**

Coleraine Leisure Centre, Railway Road, Coleraine	20.6%	21	0.0%	0	77.1%	18	9.5%	1	23.6%	1	0.0%	0	0.0%	0
Portrush Town Centre	0.4%	0	0.0%	0	0.0%	0	3.0%	0	0.0%	0	0.0%	0	0.0%	0

**Zone 3**

Ballymoney Town Centre	3.4%	3	0.0%	0	2.4%	1	18.1%	2	8.2%	0	0.0%	0	0.0%	0
Joey Dunlop Leisure Centre, Garryduff Road, Ballymoney	11.6%	12	0.0%	0	15.6%	4	56.9%	8	5.7%	0	0.0%	0	0.0%	0

**Zone 4**

Ballycastle Beach, Carrickmore Road, Ballycastle, BT54 6QS	0.1%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	0	0.0%	0	0.0%	0
Ballycastle Town Centre	0.4%	0	0.0%	0	0.0%	0	3.0%	0	0.0%	0	0.0%	0	0.0%	0

**Zone 5**

Ballymena Town Centre	1.6%	2	0.0%	0	0.0%	0	9.5%	1	0.0%	0	2.4%	0	0.0%	0
Seven Towers Leisure Centre, Trostan Avenue, Ballymena	17.0%	17	0.0%	0	0.0%	0	0.0%	0	50.6%	2	97.6%	15	0.0%	0

**Zone 6**

Greenvale Leisure Centre, Market Street, Magherafelt	11.7%	12	0.0%	0	2.4%	1	0.0%	0	0.0%	0	69.8%	11	0.0%	0
Magherafelt Town Centre	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.3%	1	0.0%	0

**Zone 7**

Everlast Gym, Crescent Link Retail Park, Crescent Link, Belfast, BT47 5FR	2.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.8%	3
Foyle Arena, Limavady Road, Londonderry	13.2%	13	36.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	51.1%	12
Templemore Sports Complex, Buncrana Road, Londonderry, BT48 7QL	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	1
White Horse Hotel, Clooney Road, Campsie, Londonderry, BT47 3PA	6.2%	6	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0	24.9%	6

**Outside Survey Area**

Antrim Forum Leisure Centre, Lough Road, Antrim	2.2%	2	0.0%	0	0.0%	0	0.0%	0	9.1%	0	0.0%	0	11.2%	2	0.0%	0
Olympia Leisure Centre and Spa, Boucher Road, Belfast, BT12 6HR	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.7%	2	0.0%	0
Strabane Town Centre	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.2%	2		
Weighted base:		101		5		24		14		5		15		16		23
Sample:		81		7		16		12		13		12		10		11

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
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**Meanscore: [Number of visits per month]****Q50 How often do you visit FACILITY MENTIONED AT Q49 for swimming?**

Those that said 'Swimming' at Q38

Daily	0.3%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	0	0.0%	0	0.0%	0
At least two times a week	4.7%	6	0.0%	0	17.3%	4	2.9%	0	2.8%	0	0.0%	0	0.0%	0
At least once a week	19.0%	23	11.3%	1	22.1%	5	17.6%	2	27.2%	1	2.1%	0	26.0%	4
At least once a fortnight	19.1%	23	21.9%	2	20.6%	5	26.9%	4	8.9%	0	19.3%	3	18.5%	3
At least once a month	20.3%	24	11.3%	1	11.2%	3	22.0%	3	20.2%	1	35.3%	6	22.3%	4
At least every two months	14.0%	17	0.0%	0	26.4%	6	9.3%	1	15.9%	1	19.7%	3	30.7%	5
At least every 3 months	2.5%	3	30.6%	2	0.0%	0	0.0%	0	16.8%	1	0.0%	0	0.0%	0
At least every 6 months	1.7%	2	0.0%	0	2.4%	1	9.3%	1	2.8%	0	0.0%	0	0.0%	0
Less often than once every 6 months	3.2%	4	0.0%	0	0.0%	0	0.0%	0	2.8%	0	2.1%	0	2.5%	0
Have only visited once (Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
15.2%	18	25.0%	2	0.0%	0	12.1%	2	2.8%	0	19.3%	3	0.0%	0	30.9%
<i>Mean:</i>		2.23		1.46		2.93		2.00		1.88		1.89		1.79
Weighted base:		119		7		24		14		5		17		16
Sample:		91		9		16		13		14		13		11
														37
														15

**Q51 Which centre / facility did you last visit for art/culture activities (i.e. theatres / galleries / museums)?**

Those that said 'Theatre / concert hall' or 'Museum / art galleries' at Q38 AND Excl. Nulls &amp; SFT

**Zone 1**

Dungiven Town Centre	0.8%	1	0.0%	0	0.0%	0	5.9%	1	0.0%	0	0.0%	0	0.0%	0
Limavady Town Centre	1.8%	3	10.4%	2	0.0%	0	5.9%	1	0.0%	0	0.0%	0	0.0%	0
Roe Valley Country Park, Dogleap Road, Limavady, BT49 9NN	0.2%	0	2.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

**Zone 2**

Bushmills Village Centre	0.1%	0	0.0%	0	0.0%	0	2.9%	0	0.0%	0	0.0%	0	0.0%	0
Coleraine Town Centre	9.3%	15	11.0%	2	21.2%	7	17.2%	4	0.0%	0	0.0%	0	0.0%	0
Garvagh Village Centre	0.4%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Riverside Retail Park (& The Jet Centre), Coleraine, BT51 3QQ	2.0%	3	0.0%	0	5.3%	2	5.3%	1	0.0%	0	0.0%	0	2.8%	0

**Zone 3**

Ballymoney Town Centre	1.0%	2	0.0%	0	0.0%	0	7.8%	2	0.0%	0	0.0%	0	0.0%	0
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**Zone 4**

Ballycastle Town Centre	0.1%	0	0.0%	0	0.0%	0	2.9%	0	0.0%	0	0.0%	0	0.0%	0
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**Zone 5**

Ballymena Town Centre	0.8%	1	0.0%	0	0.0%	0	3.7%	1	2.9%	0	2.5%	0	0.0%	0
Ecos Nature Park, Broughshane Road, Ballymena, BT43 7QA	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	0	0.0%	0

**Zone 7**

Londonderry City Centre	20.0%	33	7.8%	1	0.0%	0	7.8%	2	11.5%	1	0.0%	0	16.8%	2
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**Outside Survey Area**

Antrim Town Centre	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Beattie's Farm, Tullyveery Road, Killyleagh, Downpatrick, BT30 9TD	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Belfast City Centre	53.1%	87	32.6%	5	68.2%	23	44.4%	10	71.1%	3	89.9%	13	77.7%	11
Central London / West End	1.6%	3	2.6%	0	1.8%	1	0.0%	0	0.0%	0	5.0%	1	0.0%	0
Cookstown Town Centre	1.0%	2	7.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	0
Douglas Town Centre, Isle of Man	1.1%	2	12.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dublin City Centre	0.7%	1	5.2%	1	0.0%	0	0.0%	0	8.5%	0	0.0%	0	0.0%	0
Omagh Town Centre	1.1%	2	8.4%	1	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Strabane Town Centre	3.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waterfront Hall, Lanyon Place, Belfast, BT1 3WH	0.2%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0	0.0%	0

Weighted base:	163	16	33	22	4	14	15	60
Sample:	174	21	32	25	20	23	17	36

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
<b>Meanscore: [Number of visits per month]</b>								
<b>Q52 How often do you visit FACILITY MENTIONED AT Q51 for art / culture activities (i.e. theatres / galleries / museums)?</b>								
<i>Those that said 'Theatre / concert hall' or 'Museum / art galleries' at Q38</i>								
Daily	0.0%	0	0.0%	0	0.0%	0	0.0%	0
At least two times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0
At least once a week	0.5%	1	0.0%	0	0.0%	0	0.0%	0
At least once a fortnight	0.7%	1	0.0%	0	5.7%	1	0.0%	0
At least once a month	5.6%	10	4.6%	1	5.8%	2	4.6%	0
At least every two months	6.1%	11	0.0%	0	6.0%	2	20.6%	1
At least every 3 months	19.6%	37	28.5%	5	15.2%	6	9.3%	2
At least every 6 months	24.6%	46	13.4%	2	19.2%	7	25.9%	6
Less often than once every 6 months	26.1%	49	38.9%	7	31.5%	12	30.1%	7
Have only visited once (Don't know / varies)	5.9%	11	0.0%	0	12.6%	5	7.5%	2
	11.0%	21	14.7%	3	9.7%	4	5.2%	1
Mean:	0.31		0.23		0.26		0.39	
Weighted base:	188		18		39		22	
Sample:	196		23		36		27	
							0.32	0.30
							17	18
							24	26
							22	22
								38
								0.21
								0.35

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
<b>Q53 Which centre / facility did you last visit for running / cycling / outdoor activities?</b>								
<i>Those that said 'Outdoor activities' at Q38 AND Excl. Nulls &amp; SFT</i>								
<b>Zone 1</b>								
Benone Beach, Londonderry	3.0%	4 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 7.0%
Binevenagh Mountain, Limavady	1.4%	2 13.3%	2 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Claudy Country Park, Cumber Road, Claudy, Londonderry, BT47 4JA	0.3%	0 2.9%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Dungiven Town Centre	0.3%	0 2.9%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Limavady Town Centre	3.8%	5 36.2%	5 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Park Village Centre	0.3%	0 2.9%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Roe Valley Country Park, Dogleap Road, Limavady, BT49 9NN	1.8%	2 17.1%	2 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Roe Valley Golf Club, Lissakilly Road, Limavady, BT49 9FB	0.3%	0 2.9%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Roe Valley Leisure Centre, Greystone Road, Limavady	1.4%	2 13.3%	2 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
<b>Zone 2</b>								
Bushmills Village Centre	1.7%	2 0.0%	0 9.6%	2 3.4%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Castlerock Beach, Londonderry	0.4%	1 0.0%	0 3.0%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Castleroe Local Centre, Coleraine	0.3%	0 0.0%	0 0.0%	0 3.4%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Coleraine Tennis Club, Riversdale Road, Coleraine, BT52 1QX	2.3%	3 0.0%	0 0.0%	0 9.9%	1 0.0%	0 0.0%	0 12.3%	2 0.0%
Coleraine Town Centre	1.5%	2 0.0%	0 6.0%	1 3.4%	0 0.0%	0 3.2%	0 0.0%	0 0.0%
Kilrea Village Centre	0.4%	1 0.0%	0 3.0%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Moorbrook Fishery, Glebe Road, Castlerock, Coleraine, BT51 4SW	0.9%	1 8.4%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Portballintrae Village Centre	1.0%	1 0.0%	0 0.0%	0 11.0%	1 0.0%	0 0.0%	0 0.0%	0 0.0%
Portna Lock, Portna Road, Kilrea, BT51 5SW	1.4%	2 0.0%	0 9.6%	2 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Portrush Golf Club, Dunluce Road, Portrush, BT56 8JQ	0.7%	1 0.0%	0 3.0%	1 3.4%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Portrush Town Centre	3.8%	5 0.0%	0 20.5%	4 0.0%	0 0.0%	0 0.0%	0 0.0%	0 1.7%
Portstewart Golf Club, Strand Road, Portstewart, BT55 7PG	2.0%	3 0.0%	0 13.7%	3 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Portstewart Town Centre	4.3%	6 0.0%	0 28.7%	6 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
River Bann, Coleraine	0.4%	1 0.0%	0 3.0%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
University of Ulster Sports Centre, Cromore Road, Coleraine	3.2%	4 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 7.7%
<b>Zone 3</b>								
Ballymoney Town Centre	4.1%	5 0.0%	0 0.0%	0 45.4%	5 0.0%	0 0.0%	0 0.0%	0 0.0%
Portglenone Forest, Portglenone	0.3%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 2.7%	0 0.0%
River Clady, Pantin	0.3%	0 0.0%	0 0.0%	0 3.4%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Sheans Horse Farm, Coolkeeran Road, Armoy, Ballymoney, BT53 8XL	0.9%	1 0.0%	0 0.0%	0 9.9%	1 0.0%	0 0.0%	0 0.0%	0 0.0%
<b>Zone 4</b>								
Ballycastle Beach, Carrickmore Road, Ballycastle, BT54 6QS	0.1%	0 0.0%	0 0.0%	0 0.0%	0 2.8%	0 0.0%	0 0.0%	0 0.0%
Ballycastle Town Centre	1.0%	1 0.0%	0 0.0%	0 3.4%	0 21.0%	1 0.0%	0 0.0%	0 0.0%
Ballyvoy Village Centre	0.1%	0 0.0%	0 0.0%	0 0.0%	0 2.8%	0 0.0%	0 0.0%	0 0.0%
Cushendall Golf Club, Shore Road, Cushendall, Ballymena, BT44 0NG	0.1%	0 0.0%	0 0.0%	0 0.0%	0 2.8%	0 0.0%	0 0.0%	0 0.0%
Cushendall Village Centre	1.4%	2 0.0%	0 0.0%	0 0.0%	0 40.2%	2 0.0%	0 0.0%	0 0.0%
Glenarm Village Centre	0.6%	1 0.0%	0 0.0%	0 0.0%	0 16.4%	1 0.0%	0 0.0%	0 0.0%
Waterfoot Village Centre	0.3%	0 0.0%	0 0.0%	0 0.0%	0 8.2%	0 0.0%	0 0.0%	0 0.0%
<b>Zone 5</b>								
Ballymena Golf Club, Raceview Road, Ballymena, BT42 4HY	0.3%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 3.2%	0 0.0%	0 0.0%

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Ballymena Town Centre	3.6%	5 0.0%	0 0.0%	0 0.0%	0 0.0%	0 41.7%	5 0.0%	0 0.0%
Broughshane Village Centre	0.1%	0 0.0%	0 0.0%	0 0.0%	0 2.8%	0 0.0%	0 0.0%	0 0.0%
Cullybackey Village Centre	0.9%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 10.3%	1 0.0%	0 0.0%
Galgorm Village Centre	1.2%	2 0.0%	0 0.0%	0 0.0%	0 0.0%	0 14.2%	2 0.0%	0 0.0%
People's Park, Doury Road, Ballymena, BT43 6JA	1.3%	2 0.0%	0 0.0%	0 0.0%	0 0.0%	0 14.8%	2 0.0%	0 0.0%
<b>Zone 6</b>								
Castledawson Town Centre	0.3%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 2.7%	0 0.0%
Greenvale Leisure Centre, Market Street, Magherafelt	0.3%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 2.7%	0 0.0%
Maghera Town Centre	3.4%	4 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 29.5%	4 0.0%
Magherafelt Town Centre	2.5%	3 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 21.8%	3 0.0%
Tobermore Village Centre	0.9%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 7.8%	1 0.0%
<b>Zone 7</b>								
Ardmore Cricket Club, Green Road, Ardmore, Londonderry, BT47 3RG	2.3%	3 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 5.4%
Ballymagorry Village Centre	0.7%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 1.7%
City of Derry Golf Club, Victoria Road, Newbuildings, Londonderry, BT47 2PU	2.3%	3 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 5.4%
Drumahoe Village Centre	0.7%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 1.7%
Eglinton Village Centre	0.7%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 1.7%
Foyle Arena, Limavady Road, Londonderry	3.1%	4 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 7.4%
Londonderry City Centre	17.1%	22 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 40.8%
Waterside Local Centre, Londonderry	6.2%	8 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 14.7%
<b>Outside Survey Area</b>								
Antrim Town Centre	0.8%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 9.3%	1 0.0%	0 0.0%
Ballygally Village Centre	0.3%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 3.2%	0 0.0%	0 0.0%
Cookstown Town Centre	1.0%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 8.6%	1 0.0%
Larne Town Centre	0.7%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 1.7%
Mid Ulster Sports Arena, Tullywigan Road, Cookstown, BT80 8SD	1.4%	2 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 11.9%	2 0.0%
Newtownards Town Centre	0.3%	0 0.0%	0 0.0%	0 3.4%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Portnablagh Village Centre	0.7%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 1.7%
Strabane Golf Club, Ballycolman Road, Strabane, BT82 9PH	0.7%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 1.7%
Torr Head, Ballycastle	0.1%	0 0.0%	0 0.0%	0 0.0%	0 2.8%	0 0.0%	0 0.0%	0 0.0%
Weighted base:	131	14	20	12	5	11	15	55
Sample:	127	18	18	17	17	14	16	27

**Meanscore: [Number of visits per month]**

**Q54 How often do you visit FACILITY MENTIONED AT Q53 for running / cycling / outdoor activities?**  
Those that said 'Outdoor activities' at Q38

Daily	17.2%	26 11.8%	2 24.1%	5 5.0%	1 31.1%	1 6.0%	1 23.6%	4 18.9%	12
At least two times a week	25.5%	38 12.0%	2 41.9%	9 37.9%	6 45.9%	2 36.2%	4 21.8%	3 17.6%	11
At least once a week	23.6%	35 37.8%	6 31.4%	7 30.7%	5 13.9%	1 32.6%	4 16.4%	2 16.0%	10
At least once a fortnight	3.1%	5 7.0%	1 0.0%	0 5.0%	1 0.0%	0 0.0%	0 0.0%	0 4.2%	3
At least once a month	9.9%	15 2.4%	0 0.0%	0 7.5%	1 0.0%	0 0.0%	0 14.0%	2 17.5%	11
At least every two months	8.5%	13 11.1%	2 0.0%	0 0.0%	0 0.0%	0 0.0%	0 24.3%	4 11.3%	7
At least every 3 months	1.2%	2 11.1%	2 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0
At least every 6 months	0.6%	1 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 1.5%	1
Less often than once every 6 months	0.5%	1 0.0%	0 0.0%	0 2.5%	0 9.1%	0 0.0%	0 0.0%	0 0.0%	0
Have only visited once (Don't know / varies)	2.8%	4 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 6.7%	4
Mean:	8.88	6.47	11.66	6.59	12.96	7.87	9.26	8.80	
Weighted base:	150	17	22	16	5	12	15	63	
Sample:	142	21	20	22	17	16	16	30	

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
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**Q55 How do you normally travel when visiting leisure destinations?**

Those that said an activity at Q38

Car / van (as driver)	59.1%	321	38.1%	24	75.4%	74	70.5%	46	68.0%	15	54.5%	32	64.3%	38	52.1%	93
Car / van (as passenger)	20.9%	113	36.8%	23	15.5%	15	21.8%	14	20.9%	5	22.6%	13	17.2%	10	18.6%	33
Bus, minibus or coach	4.8%	26	2.6%	2	0.0%	0	0.0%	0	1.2%	0	0.6%	0	3.6%	2	12.1%	22
Motorcycle, scooter or moped	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	3
Walk	6.4%	35	9.0%	6	2.9%	3	0.6%	0	6.0%	1	7.5%	4	11.7%	7	7.5%	13
Taxi	2.5%	13	7.7%	5	1.7%	2	0.0%	0	0.0%	0	5.3%	3	0.0%	0	2.2%	4
Train	2.9%	15	0.0%	0	4.4%	4	4.3%	3	1.2%	0	7.1%	4	0.7%	0	2.0%	4
Metro	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bicycle	0.6%	3	3.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.0%	0
Mobility scooter / disability vehicle	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	3
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aeroplane	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.7%	9	2.9%	2	0.0%	0	2.9%	2	2.7%	1	1.8%	1	0.0%	0	2.3%	4
Weighted base:		542		62		98		65		22		58		60		178
Sample:		553		83		83		80		80		73		72		82

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
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**Q56 Which leisure facilities would you like to see more of in the Causeway Coast and Glens Borough Council area? [MR]**

More children facilities / activities	12.0%	84	11.0%	8	17.6%	21	8.8%	7	21.7%	6	19.5%	16	15.7%	13	5.1%	12
Restaurants	8.8%	61	4.2%	3	12.4%	15	6.4%	5	15.2%	4	21.6%	18	10.3%	9	3.1%	7
Bars / pubs	8.1%	57	5.1%	4	7.6%	9	1.5%	1	3.8%	1	14.7%	12	4.4%	4	11.3%	26
Leisure centre	8.1%	56	13.6%	10	3.3%	4	6.1%	5	6.7%	2	17.9%	15	0.0%	0	9.1%	21
Better shopping facilities	7.1%	49	1.1%	1	13.1%	16	14.3%	12	4.8%	1	14.3%	12	3.0%	2	2.1%	5
Better public transport	6.2%	43	14.0%	10	0.0%	0	0.0%	0	0.9%	0	3.9%	3	0.0%	0	13.1%	30
More for older people to do	6.0%	42	6.1%	4	6.1%	7	0.9%	1	0.9%	0	8.6%	7	4.4%	4	8.1%	18
Health and fitness (gym)	5.3%	37	9.4%	7	4.7%	6	0.5%	0	3.5%	1	5.3%	4	1.4%	1	7.9%	18
Swimming pool	5.2%	36	5.9%	4	5.2%	6	2.5%	2	6.6%	2	4.3%	4	6.2%	5	5.8%	13
Play spaces / park facilities	4.7%	33	10.4%	7	1.4%	2	3.7%	3	7.2%	2	5.7%	5	8.1%	7	3.2%	7
Cinema	4.1%	29	6.1%	4	1.6%	2	4.6%	4	0.4%	0	3.9%	3	2.6%	2	5.8%	13
More walking facilities / routes	4.0%	28	6.3%	5	3.4%	4	1.4%	1	1.7%	1	5.3%	4	0.5%	0	5.6%	13
More sports facilities (football pitches, tennis courts)	3.7%	26	5.3%	4	0.5%	1	5.1%	4	7.2%	2	7.4%	6	0.0%	0	4.0%	9
Bowling alley	3.2%	22	0.6%	0	2.1%	3	1.5%	1	3.1%	1	11.0%	9	7.2%	6	0.8%	2
Ice rink	3.0%	21	0.0%	0	1.6%	2	2.1%	2	0.0%	0	5.9%	5	0.0%	0	5.5%	13
Indoor soft play areas	2.8%	20	2.6%	2	2.2%	3	2.2%	2	9.8%	3	5.8%	5	1.6%	1	1.8%	4
Concert hall / venue	2.7%	19	0.0%	0	0.5%	1	0.9%	1	0.0%	0	3.9%	3	2.1%	2	5.5%	12
Theatre	2.6%	18	0.6%	0	1.0%	1	3.8%	3	0.4%	0	3.9%	3	1.9%	2	3.7%	8
Museum / art galleries	2.3%	16	0.0%	0	2.1%	3	0.0%	0	0.0%	0	4.3%	4	0.0%	0	4.4%	10
Dance facilities	2.2%	15	4.2%	3	0.0%	0	0.5%	0	1.4%	0	3.9%	3	0.0%	0	3.5%	8
Extreme sports	2.1%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	3	0.0%	0	5.0%	11
Karting	2.1%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.8%	6	0.0%	0	3.6%	8
Paintballing	1.7%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	3	0.0%	0	3.7%	8
Better disabled facilities	1.6%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	6	0.0%	0	2.6%	6
Cycle paths / area	1.6%	11	7.8%	6	1.6%	2	0.0%	0	2.7%	1	3.9%	3	0.0%	0	0.0%	0
Skateboarding	1.5%	11	0.0%	0	0.0%	0	0.5%	0	0.0%	0	3.9%	3	0.0%	0	3.1%	7
Hotels	1.5%	11	0.0%	0	1.6%	2	0.0%	0	0.0%	0	3.9%	3	1.4%	1	1.9%	4
Bingo	0.6%	4	0.0%	0	0.0%	0	0.0%	0	2.5%	1	3.9%	3	0.0%	0	0.0%	0
Improving the current leisure facilities	0.5%	3	0.0%	0	0.5%	1	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.4%	1
Lido / outdoor swimming pool	0.4%	3	0.6%	0	2.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mini golf	0.4%	3	0.0%	0	2.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More festivals / events	0.3%	2	0.6%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.4%	1
More art / craft classes	0.3%	2	0.0%	0	1.6%	2	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More art / craft classes	0.3%	2	0.0%	0	1.6%	2	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Outdoor gyms	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.4%	1
More for families to do	0.3%	2	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better nightlife	0.3%	2	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More activities for people with disabilities	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0
Arcades	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.0%	0
More markets	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0
More bowling greens	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Climbing wall	0.1%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Live music venues	0.1%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Community centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0	0.0%	0
Lower prices to access leisure facilities	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0	0.0%	0
Library	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0	0.0%	0	0.0%	0
Better beaches	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(None)	43.0%	301	49.3%	35	39.9%	48	41.4%	35	30.2%	9	35.3%	29	49.7%	42	45.3%	103
(Don't know)	10.2%	72	6.6%	5	9.5%	11	15.8%	13	14.8%	4	10.0%	8	12.4%	10	8.3%	19
Weighted base:		700		71		120		85		30		83		84		227
Sample:		700		100		100		100		100		100		100		100

Column %ges.

Weighted:

July 2025

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
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**Q57 Which other community facilities and businesses would you like to see in the Causeway Coast and Glens Borough Council area? [MR/PR]**

Hotels	13.4%	94	16.8%	12	14.1%	17	8.8%	7	20.5%	6	17.1%	14	10.1%	8	12.7%	29
Cultural centres	15.0%	105	23.7%	17	11.2%	13	8.6%	7	3.4%	1	17.0%	14	4.2%	4	21.4%	48
Religious institutions	4.1%	29	2.9%	2	7.6%	9	1.4%	1	2.1%	1	8.0%	7	2.4%	2	3.0%	7
Tourist attractions	22.8%	160	19.5%	14	26.2%	32	21.2%	18	15.4%	5	24.0%	20	30.2%	25	20.4%	46
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Bs	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	1.4%	1	0.0%	0
Clothes shops	0.3%	2	0.0%	0	0.5%	1	1.5%	1	0.0%	0	0.0%	0	0.5%	0	0.0%	0
Farmers markets	0.1%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Green spaces	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0
Hostels	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0
Independent stores	0.8%	6	0.0%	0	1.9%	2	0.5%	0	0.4%	0	0.0%	0	0.5%	0	1.2%	3
Leisure facilities for children	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.4%	1
Lidl store	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0	0.0%	0	0.0%	0
M&S store in Ballymoney	0.2%	1	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
McDonald's restaurant	0.3%	2	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better car parks	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0	0.0%	0	1.2%	3
More government jobs	0.3%	2	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More housing	0.1%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More local businesses	0.9%	6	2.6%	2	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0	1.9%	4
More multinational companies	0.2%	1	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Museums	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0	0.0%	0
Post offices	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0	0.0%	0
Railway station in Portstewart	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Restaurants	0.3%	2	0.6%	0	0.5%	1	0.5%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0
Sheskburn Recreation Centre to be refurbished	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0	0.0%	0	0.0%	0
Theatres	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0	0.0%	0
Town hall in Portstewart	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	12.3%	86	8.6%	6	11.2%	13	12.0%	10	9.4%	3	10.5%	9	14.8%	12	14.3%	32
(None)	47.2%	330	43.1%	31	49.0%	59	52.1%	44	56.3%	17	49.7%	41	47.9%	40	43.3%	98
Weighted base:		700		71		120		85		30		83		84		227
Sample:		700		100		100		100		100		100		100		100

**GEN Gender of respondent.**

Male	26.5%	185	30.6%	22	25.1%	30	22.7%	19	13.8%	4	20.5%	17	14.1%	12	35.7%	81
Female	73.5%	515	69.4%	50	74.9%	90	77.3%	65	86.2%	25	79.5%	66	85.9%	72	64.3%	146
Weighted base:		700		71		120		85		30		83		84		227
Sample:		700		100		100		100		100		100		100		100

**AGE Could I ask how old you are please?**

18 – 24 years	9.3%	65	7.8%	6	6.7%	8	6.5%	6	6.0%	2	7.9%	7	4.4%	4	15.0%	34
25 – 34 years	12.4%	87	10.4%	7	13.3%	16	13.1%	11	10.0%	3	17.8%	15	11.1%	9	11.2%	25
35 – 44 years	17.3%	121	15.0%	11	17.1%	21	16.8%	14	21.3%	6	19.1%	16	15.0%	13	18.0%	41
45 – 54 years	18.2%	127	16.3%	12	17.1%	21	19.8%	17	16.8%	5	16.6%	14	21.8%	18	18.3%	41
55 – 64 years	17.2%	121	9.8%	7	16.8%	20	16.4%	14	24.0%	7	16.2%	14	19.6%	16	18.8%	43
65+ years	25.5%	178	40.7%	29	29.0%	35	27.5%	23	21.8%	6	22.4%	19	28.1%	24	18.7%	42
(Refused)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		700		71		120		85		30		83		84		227
Sample:		700		100		100		100		100		100		100		100

**QUOTA Zone**

Zone 1	10.2%	71	100.0%	71	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2	17.2%	120	0.0%	0	100.0%	120	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3	12.1%	85	0.0%	0	0.0%	0	100.0%	85	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 4	4.2%	30	0.0%	0	0.0%	0	0.0%	0	100.0%	30	0.0%	0	0.0%	0	0.0%	0
Zone 5	11.9%	83	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	83	0.0%	0	0.0%	0
Zone 6	12.0%	84	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	84	0.0%	0
Zone 7	32.4%	227	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	227
Weighted base:		700		71		120		85		30		83		84		227
Sample:		700		100		100		100		100		100		100		100

Column %ges.

Weighted:

July 2025

PC Postcode Sector	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
BT42 1	4.6%	32	0.0%	0	0.0%	0	0.0%	0
BT42 4	3.8%	27	0.0%	0	0.0%	0	0.0%	0
BT43 5	0.7%	5	0.0%	0	0.0%	0	0.0%	0
BT43 6	1.2%	8	0.0%	0	0.0%	0	0.0%	0
BT43 7	1.7%	12	0.0%	0	0.0%	0	0.0%	0
BT44 0	3.5%	25	0.0%	0	0.0%	0	0.0%	0
BT44 8	1.2%	8	0.0%	0	0.0%	0	0.0%	0
BT44 9	1.9%	13	0.0%	0	0.0%	0	0.0%	0
BT45 5	3.1%	22	0.0%	0	0.0%	0	0.0%	0
BT45 7	3.1%	22	0.0%	0	0.0%	0	0.0%	0
BT45 8	2.0%	14	0.0%	0	0.0%	0	0.0%	0
BT46 5	3.0%	21	0.0%	0	0.0%	0	0.0%	0
BT47 2	4.7%	33	0.0%	0	0.0%	0	0.0%	0
BT47 3	6.1%	42	0.0%	0	0.0%	0	0.0%	0
BT47 4	2.0%	14	19.1%	14	0.0%	0	0.0%	0
BT47 5	5.4%	38	0.0%	0	0.0%	0	0.0%	0
BT47 6	0.7%	5	0.0%	0	0.0%	0	0.0%	0
BT48 0	2.2%	15	0.0%	0	0.0%	0	0.0%	0
BT48 6	0.6%	4	0.0%	0	0.0%	0	0.0%	0
BT48 7	3.9%	28	0.0%	0	0.0%	0	0.0%	0
BT48 8	4.1%	29	0.0%	0	0.0%	0	0.0%	0
BT48 9	1.9%	13	0.0%	0	0.0%	0	0.0%	0
BT49 0	5.6%	39	54.7%	39	0.0%	0	0.0%	0
BT49 9	2.7%	19	26.2%	19	0.0%	0	0.0%	0
BT51 3	2.2%	15	0.0%	0	12.8%	15	0.0%	0
BT51 4	1.5%	10	0.0%	0	8.6%	10	0.0%	0
BT51 5	3.0%	21	0.0%	0	17.5%	21	0.0%	0
BT52 1	2.9%	21	0.0%	0	17.1%	21	0.0%	0
BT52 2	2.5%	18	0.0%	0	14.7%	18	0.0%	0
BT53 6	2.8%	20	0.0%	0	0.0%	0	23.1%	20
BT53 7	3.7%	26	0.0%	0	0.0%	0	30.7%	26
BT53 8	2.5%	18	0.0%	0	0.0%	0	20.8%	18
BT54 6	0.7%	5	0.0%	0	0.0%	0	0.0%	0
BT55 7	1.8%	13	0.0%	0	10.7%	13	0.0%	0
BT56 8	1.1%	8	0.0%	0	6.4%	8	0.0%	0
BT57 8	2.1%	15	0.0%	0	12.2%	15	0.0%	0
BT79 8	0.7%	5	0.0%	0	0.0%	0	0.0%	0
BT82 0	2.8%	20	0.0%	0	0.0%	0	0.0%	0
Weighted base:	700	71	120	85	30	83	84	227
Sample:	700	100	100	100	100	100	100	100

Column %ges.

## **Appendix 7:**

### Sample Questionnaire

**Job No: 060A25****Causeway Coast & Glens Council Retail & Leisure Study**

Good morning / afternoon / evening, I am ..... from NEMS market research, an independent market research company, and we are conducting a survey on behalf of Causeway Coast & Glens Borough Council about shopping and leisure habits. Do you have time to answer some questions please? It will take about 7 minutes.

**QA** Are you the person responsible, or jointly responsible for the main food shopping in your household?

Yes  
No

IF 'YES' – CONTINUE INTERVIEW.

IF 'NO' – ASK, COULD I SPEAK TO THE PERSON WHO IS RESPONSIBLE FOR MOST OF THE FOOD SHOPPING, IF NOT AVAILABLE THANK AND CLOSE INTERVIEW

**READ OUT: We now have a few questions about where you go Food shopping. In answering these questions the location may be a store, a town, a specific road or area, or it could be the internet.**

**Q01** Where did you last undertake your household's main food and grocery shopping?  
DO NOT READ OUT. ONE ANSWER ONLY.

#Food	Convenience List	GO TO Q03
502	Internet / delivery	GO TO Q02
505	(Don't know / varies)	CLOSE
506	(Don't do this type of shopping)	CLOSE

**ASKED TO THOSE WHO SAID "INTERNET / DELIVERY" AT Q01**

**Q02** For your last main food internet / home delivery shopping order, how did you receive your goods?  
DO NOT READ OUT. ONE ANSWER ONLY.

1	Collection at store
2	Home delivery
3	Delivery to place of work
4	Collection at click and collect hub (non-store location)
5	Collection at other location (PLEASE WRITE IN)
6	(Don't know / varies)

**ASKED TO THOSE WHO SAID "INTERNET / DELIVERY" AT Q01**

**Q03** Which retailer do you purchase your main food internet / home delivery shopping from?  
DO NOT READ OUT. ONE ANSWER ONLY.

1	Asda
2	Supervalu
3	Iceland
4	Sainsbury's
5	Tesco
6	Marks and Spencer
7	Other (PLEASE WRITE IN)
8	(Don't know / varies)

**Q04** What is the main reason you choose (STORE MENTIONED AT Q01) to do your main food and grocery shopping?  
DO NOT READ OUT. ONE ANSWER ONLY

001	Accessibility by public transport
002	Car parking prices
003	Car parking provision
004	Choice of food goods available
005	Choice of shops nearby selling non-food goods
006	Choice of shops selling food goods
007	Cleanliness
008	Delivery service
009	Easy to get to by car
010	Entertainment / events
011	Good internal layout
012	Good opening hours
013	Good service / friendly staff
014	Habit / always use it / preference for retailer
015	Internet shopping is convenient
016	Lower prices
017	Loyalty card / points scheme
018	Near to home
019	Near to work
020	Nice shopping environment
021	Only one in the area / no other choice
022	Provision of leisure facilities nearby
023	Provision of services nearby, such as banks and other financial services
024	Public information, signposts and public facilities
025	Quality of food goods available
026	Quality of shops selling food goods
027	Safety (during the day)
028	Safety (during the evening / night time)
029	Staff discount / work there
030	To support local shops
031	Value for money
500	Other (PLEASE WRITE IN)
505	(Don't know / varies)
509	(No particular reason)

**Q05** **What if anything is the one thing you most dislike about your main food and grocery shopping destination (STORE MENTIONED AT Q01) ?**  
DO NOT READ OUT. ONE ANSWER ONLY

- 001 Change layout too often
- 002 Difficult to get to
- 003 Difficult to park/Lack of parking
- 004 Expensive
- 005 Expensive parking
- 006 Internet issues (can't choose own produce / substitutions etc.)
- 007 Lack of cycle parking
- 008 Lack of public transport
- 009 Limited range of goods
- 010 No petrol station
- 011 Poor internal layout
- 012 Poor quality
- 013 Preference for retailer
- 014 Staff rude / unhelpful
- 015 Too busy
- 016 Too far away
- 017 Too small
- 500 Other (PLEASE WRITE IN)
- 505 (Don't know)
- 509 (Nothing)

**Q06** **How much on average does your household normally spend on main food and grocery shopping in a week?**  
DO NOT PROMPT. ONE ANSWER ONLY.

- X To the nearest £: (PLEASE WRITE IN)
- Y (Don't know / varies)
- Z (Refused)

**Q07** **How often do you normally do your main food shopping at (STORE MENTIONED AT Q01)?**  
DO NOT READ OUT. ONE ANSWER ONLY. PROMPT IF NECESSARY

- 1 Daily
- 2 At least two times a week
- 3 At least once a week
- 4 At least once a fortnight
- 5 At least once a month
- 6 At least every two months
- 7 Less often
- 8 Have only visited once
- 9 (Don't know / varies)

**NOT ASKED TO THOSE WHO SAID "INTERNET / DELIVERY" AT Q01**

**Q08** **How do you normally travel to (STORE MENTIONED AT Q01)?**  
DO NOT READ OUT. ONE ANSWER ONLY.

- 1 Car / van (as driver)
- 2 Car / van (as passenger)
- 3 Bus (including the busway or guided bus), minibus or coach
- 4 Motorcycle, scooter or moped
- 5 Walk
- 6 Taxi
- 7 Train
- 8 Metro
- 9 Bicycle
- A Mobility scooter / disability vehicle
- B Other (PLEASE WRITE IN)
- C (Don't know / varies)

**NOT ASKED TO THOSE WHO SAID "INTERNET / DELIVERY" AT Q01**

**Q09** **How long did your last journey to (STORE MENTIONED AT Q01) take?**  
DO NOT PROMPT. ONE ANSWER ONLY.

- X Amount of time taken to nearest whole minute (PLEASE WRITE IN)
- Y (Don't know / can't remember)
- Z (Refused)

**Q10** **When do you do your main food shopping?**  
DO NOT PROMPT. ONE ANSWER ONLY.

- 1 Weekdays during the day
- 2 Weekdays during the evening
- 3 Saturday
- 4 Sunday
- 5 (Don't know / varies)

<b>NOT ASKED TO THOSE WHO SAID "INTERNET / DELIVERY" AT Q01</b>		
<b>Q11 When you go main food shopping is your trip linked with any other activity?</b>		
DO NOT PROMPT. ONE ANSWER ONLY. IF IN STORE IN A SUPERMARKET WRITE IN NAME OF SUPERMARKET AND TOWN. IF 'COLERAINE' MENTIONED, PLEASE PROBE TO DETERMINE IF RESPONDENT USES COLERAINE TOWN CENTRE OR THE COLERAINE RIVERSIDE RETAIL PARK.		
1	Yes – non-food shopping	GO TO Q12
2	Yes – other food shopping	GO TO Q12
3	Yes – visiting services such as banks and other financial institutions	GO TO Q12
4	Yes – leisure activity	GO TO Q13
5	Yes – travelling to/from work	GO TO Q13
6	Yes – travelling to/from school/college/university	GO TO Q13
7	Yes – getting petrol	GO TO Q13
8	Yes – visiting café / pub / restaurant	GO TO Q13
9	Yes – visiting family/friends	GO TO Q13
A	Yes – visiting health service such as doctor, dentist, hospital	GO TO Q13
B	Yes – visiting other service such as laundrette, hairdresser, recycling	GO TO Q13
C	Yes – other activity (PLEASE WRITE IN)	GO TO Q13
D	(No activity)	GO TO Q13
E	(Don't know / varies)	GO TO Q13
<b>ASK THOSE WHO SAID YES TO: "NON-FOOD", "OTHER FOOD" OR "FINANCIAL INSTITUTIONS" AT Q11 OTHERS GO TO Q13</b>		
<b>Q12 Where do you do this linked trip?</b>		
DO NOT PROMPT. ONE ANSWER ONLY. IF IN STORE IN A SUPERMARKET WRITE IN NAME OF SUPERMARKET AND TOWN.		
#NFood	Comparison List	
<b>Q13 Do you make 'top up' shopping trips for staple goods, such as bread and milk, in between your main food shopping trip?</b>		
DO NOT READ OUT. ONE ANSWER ONLY.		
1	Yes	GO TO Q14
2	No	GO TO Q17
<b>ASKED TO THOSE WHO DO TOP UP SHOPPING AT Q13</b>		
<b>Q14 Where did you last undertake this 'top up' shopping?</b>		
DO NOT READ OUT. ONE ANSWER ONLY.		
#Food	Convenience List	
<b>ASKED TO THOSE WHO DO TOP UP SHOPPING AT Q13</b>		
<b>Q15 How often do you make 'top up' shopping trips to (STORE MENTIONED AT Q14)?</b>		
DO NOT READ OUT. ONE ANSWER ONLY.		
1	Daily	
2	At least two times a week	
3	At least once a week	
4	At least once a fortnight	
5	At least once a month	
6	At least every two months	
7	Less often	
8	Have only visited once	
9	(Don't know / varies)	
<b>ASKED TO THOSE WHO DO TOP UP SHOPPING AT Q13</b>		
<b>Q16 How much on average does your household normally spend on top up shopping in a week?</b>		
DO NOT READ OUT. ONE ANSWER ONLY.		
X	To the nearest £: (PLEASE WRITE IN)	
Y	(Don't know / varies)	
Z	(Refused)	
<b>READ OUT: We now have a few questions about where you go for non-food shopping. In answering these questions the location may be a town centre, a retail park, or a free standing store, or could be facilities such as the Internet, TV / interactive shopping or use of a home catalogue.</b>		
<b>Q17 Where did you last buy clothing or footwear goods?</b>		
DO NOT PROMPT. ONE ANSWER ONLY. IF IN STORE IN A SUPERMARKET WRITE IN NAME OF SUPERMARKET AND TOWN. IF 'COLERAINE' MENTIONED, PLEASE PROBE TO DETERMINE IF RESPONDENT USES COLERAINE TOWN CENTRE OR THE COLERAINE RIVERSIDE RETAIL PARK.		
#NFood	Comparison List	GO TO Q18
502	Abroad	GO TO Q19
502	Internet / delivery	GO TO Q19
505	(Don't know / varies)	GO TO Q18
506	(Don't do this type of shopping)	GO TO Q19

NOT ASKED TO THOSE WHO SAID "INTERNET / DELIVERY" OR "ABROAD" OR (DON'T DO THIS TYPE OF SHOPPING) AT Q17

**Q18 When you go shopping for clothing or footwear, do you link this trip with another activity?**  
DO NOT PROMPT. ONE ANSWER ONLY. IF RESPONDENT STATES MORE THAN ONE ANSWER - TAKE THEIR FIRST ANSWER

- 1 Yes – food shopping
- 2 Yes – non-food shopping
- 3 Yes – visiting services such as banks and other financial institutions
- 4 Yes – leisure activity
- 5 Yes – travelling to/from work
- 6 Yes – travelling to/from school/college/university
- 7 Yes – getting petrol
- 8 Yes – visiting café / pub / restaurant
- 9 Yes – visiting family/friends
- A Yes – visiting health service such as doctor, dentist, hospital
- B Yes – visiting other service such as laundrette, hairdresser, recycling
- C Yes – other activity (PLEASE WRITE IN)
- D No
- E (Don't know / varies)

**Q19 Where did you last buy books, CDs, DVDs?**

DO NOT PROMPT. ONE ANSWER ONLY. IF IN STORE IN A SUPERMARKET WRITE IN NAME OF SUPERMARKET AND TOWN. IF 'COLERAINE' MENTIONED, PLEASE PROBE TO DETERMINE IF RESPONDENT USES COLERAINE TOWN CENTRE OR THE COLERAINE RIVERSIDE RETAIL PARK.

#NFood Comparison List

**Q20 Where did you last buy small household goods such as home furnishings, jewellery, glass and china items?**

DO NOT PROMPT. ONE ANSWER ONLY. IF IN STORE IN A SUPERMARKET WRITE IN NAME OF SUPERMARKET AND TOWN. IF 'COLERAINE' MENTIONED, PLEASE PROBE TO DETERMINE IF RESPONDENT USES COLERAINE TOWN CENTRE OR THE COLERAINE RIVERSIDE RETAIL PARK.

#NFood Comparison List

**Q21 Where did you last buy goods such as toys, games, bicycles and recreational goods?**

DO NOT PROMPT. ONE ANSWER ONLY. IF IN STORE IN A SUPERMARKET WRITE IN NAME OF SUPERMARKET AND TOWN. IF 'COLERAINE' MENTIONED, PLEASE PROBE TO DETERMINE IF RESPONDENT USES COLERAINE TOWN CENTRE OR THE COLERAINE RIVERSIDE RETAIL PARK.

#NFood Comparison List

**Q22 Where did you last buy chemist goods (including health and beauty products)?**

DO NOT PROMPT. ONE ANSWER ONLY. IF IN STORE IN A SUPERMARKET WRITE IN NAME OF SUPERMARKET AND TOWN. IF 'COLERAINE' MENTIONED, PLEASE PROBE TO DETERMINE IF RESPONDENT USES COLERAINE TOWN CENTRE OR THE COLERAINE RIVERSIDE RETAIL PARK.

#NFood Comparison List

**Q23 Where did you last buy electrical items, such as televisions, washing machines and computers?**

DO NOT PROMPT. ONE ANSWER ONLY. IF IN STORE IN A SUPERMARKET WRITE IN NAME OF SUPERMARKET AND TOWN. IF 'COLERAINE' MENTIONED, PLEASE PROBE TO DETERMINE IF RESPONDENT USES COLERAINE TOWN CENTRE OR THE COLERAINE RIVERSIDE RETAIL PARK.

#NFood Comparison List

**Q24 Where did you last buy DIY or gardening goods?**

DO NOT PROMPT. ONE ANSWER ONLY. IF IN STORE IN A SUPERMARKET WRITE IN NAME OF SUPERMARKET AND TOWN. IF 'COLERAINE' MENTIONED, PLEASE PROBE TO DETERMINE IF RESPONDENT USES COLERAINE TOWN CENTRE OR THE COLERAINE RIVERSIDE RETAIL PARK.

#NFood Comparison List

**Q25 Where did you last buy furniture, carpets and floor coverings?**

DO NOT PROMPT. ONE ANSWER ONLY. IF IN STORE IN A SUPERMARKET WRITE IN NAME OF SUPERMARKET AND TOWN. IF 'COLERAINE' MENTIONED, PLEASE PROBE TO DETERMINE IF RESPONDENT USES COLERAINE TOWN CENTRE OR THE COLERAINE RIVERSIDE RETAIL PARK.

#NFood Comparison List

**Q26 Do you ever visit any of the following centres?**

READ OUT. CAN BE MULTICODED.

- 1 Coleraine
- 2 Coleraine Riverside Retail Park
- 3 Limavady
- 4 Ballycastle
- 5 Ballymoney
- 6 Portrush
- 7 Portstewart
- 8 (Don't visit any of these centres)

GO TO Q28

**LIST POPULATED BY LOCATION ANSWERS GIVEN AT Q26 (IF MORE THAN ONE LOCATION STATED)**

**Q27**

**Which of those centres do you visit the most?**

ONE ANSWER ONLY. IF THEY AREN'T SURE ASK THEM TO STATE THE CENTRE THEY THINK THEY VISIT THE MOST.

- 1 Coleraine
- 2 Coleraine Riverside Retail Park
- 3 Limavady
- 4 Ballycastle
- 5 Ballymoney
- 6 Portrush
- 7 Portstewart

**ASK THOSE WHO DON'T VISIT COLERAINE AT Q26**

**Q28**

**Why don't you visit Coleraine?**

DO NOT READ OUT. CAN BE MULTICODED

- 1 Lack of choice and range of non-food shops
- 2 Lack of choice and range of food shops
- 3 Choice of leisure facilities (cinema, gym, pubs etc.)
- 4 Choice of services (hairdressers, banks etc.)
- 5 Environmental quality of centre
- 6 Too far away from home
- 7 Too far away from work
- 8 Not accessible by public transport
- 9 Inconveniently located car parking
- A Expensive car parking
- B Traffic congestion
- C Other (PLEASE WRITE IN)
- D (Nothing, no reason to visit)
- E (Don't know)

**ASK THOSE WHO DON'T VISIT COLERAINE RIVERSIDE AT Q26**

**Q29**

**Why don't you visit Coleraine Riverside?**

DO NOT READ OUT. CAN BE MULTICODED

- 1 Lack of choice and range of non-food shops
- 2 Lack of choice and range of food shops
- 3 Choice of leisure facilities (cinema, gym, pubs etc.)
- 4 Choice of services (hairdressers, banks etc.)
- 5 Environmental quality of centre
- 6 Too far away from home
- 7 Too far away from work
- 8 Not accessible by public transport
- 9 Inconveniently located car parking
- A Expensive car parking
- B Traffic congestion
- C Other (PLEASE WRITE IN)
- D (Nothing, no reason to visit)
- E (Don't know)

**ASK THOSE WHO DON'T VISIT LIMAVADY AT Q26**

**Q30**

**Why don't you visit Limavady?**

DO NOT READ OUT. CAN BE MULTICODED

- 1 Lack of choice and range of non-food shops
- 2 Lack of choice and range of food shops
- 3 Choice of leisure facilities (cinema, gym, pubs etc.)
- 4 Choice of services (hairdressers, banks etc.)
- 5 Environmental quality of centre
- 6 Too far away from home
- 7 Too far away from work
- 8 Not accessible by public transport
- 9 Inconveniently located car parking
- A Expensive car parking
- B Traffic congestion
- C Other (PLEASE WRITE IN)
- D (Nothing, no reason to visit)
- E (Don't know)

**ASK THOSE WHO DON'T VISIT BALLYCASTLE AT Q26**

**Q31**

**Why don't you visit Ballycastle?**

DO NOT READ OUT. CAN BE MULTICODED

- 1 Lack of choice and range of non-food shops
- 2 Lack of choice and range of food shops
- 3 Choice of leisure facilities (cinema, gym, pubs etc.)
- 4 Choice of services (hairdressers, banks etc.)
- 5 Environmental quality of centre
- 6 Too far away from home
- 7 Too far away from work
- 8 Not accessible by public transport
- 9 Inconveniently located car parking
- A Expensive car parking
- B Traffic congestion
- C Other (PLEASE WRITE IN)
- D (Nothing, no reason to visit)
- E (Don't know)

**ASK THOSE WHO DON'T VISIT BALLYMONEY AT Q26**

**Q32 Why don't you visit Ballymoney?**  
DO NOT READ OUT. CAN BE MULTICODED

- 1 Lack of choice and range of non-food shops
  - 2 Lack of choice and range of food shops
  - 3 Choice of leisure facilities (cinema, gym, pubs etc.)
  - 4 Choice of services (hairdressers, banks etc.)
  - 5 Environmental quality of centre
  - 6 Too far away from home
  - 7 Too far away from work
  - 8 Not accessible by public transport
  - 9 Inconveniently located car parking
- A Expensive car parking  
B Traffic congestion  
C Other (PLEASE WRITE IN)  
D (Nothing, no reason to visit)  
E (Don't know)

**ASK THOSE WHO DON'T VISIT PORTRUSH AT Q26**

**Q33 Why don't you visit Portrush?**  
DO NOT READ OUT. CAN BE MULTICODED

- 1 Lack of choice and range of non-food shops
  - 2 Lack of choice and range of food shops
  - 3 Choice of leisure facilities (cinema, gym, pubs etc.)
  - 4 Choice of services (hairdressers, banks etc.)
  - 5 Environmental quality of centre
  - 6 Too far away from home
  - 7 Too far away from work
  - 8 Not accessible by public transport
  - 9 Inconveniently located car parking
- A Expensive car parking  
B Traffic congestion  
C Other (PLEASE WRITE IN)  
D (Nothing, no reason to visit)  
E (Don't know)

**ASK THOSE WHO DON'T VISIT PORTSTEWART AT Q26**

**Q34 Why don't you visit Portstewart?**  
DO NOT READ OUT. CAN BE MULTICODED

- 1 Lack of choice and range of non-food shops
  - 2 Lack of choice and range of food shops
  - 3 Choice of leisure facilities (cinema, gym, pubs etc.)
  - 4 Choice of services (hairdressers, banks etc.)
  - 5 Environmental quality of centre
  - 6 Too far away from home
  - 7 Too far away from work
  - 8 Not accessible by public transport
  - 9 Inconveniently located car parking
- A Expensive car parking  
B Traffic congestion  
C Other (PLEASE WRITE IN)  
D (Nothing, no reason to visit)  
E (Don't know)

**Q35 Which of the following, if any, methods of electronic home shopping do you use?**

READ OUT. CAN BE MULTICODED

- |   |           |
|---|-----------|
| 1 Internet  | GO TO Q36 |
| 2 Portable Internet shopping (through mobile phone) | GO TO Q36 |
| 3 TV Shopping                                       | GO TO Q36 |
| 4 (None of these)                                   | GO TO Q38 |

**ASKED TO THOSE WHO USE ELECTRONIC HOME SHOPPING AT Q29**

**Q36** **Which goods or services do you currently purchase via electronic (home / mobile) shopping?**  
DO NOT READ OUT. CAN BE MULTICODED.

- 1 Baby items
- 2 Banking / finance
- 3 Batteries
- 4 Books
- 5 Car parts / products
- 6 CDs, DVDs, Vinyl (physical products)
- 7 Cleaning products
- 8 Clothes
- 9 Computer / printer accessories
- A Console / PC games
- B Craft / hobby items
- C DIY goods
- D Downloadable / streamed content (e.g. music / movies / tv / games / apps)
- E Food
- F Furniture / Carpets
- G Garden items
- H Gifts
- I Health / beauty / cosmetic / toiletry items
- J Holiday and / or Travel Tickets
- K Jewellery
- L Major electrical items
- M Mobile phone / tablet / pad accessories
- N Pet products
- O Photographs
- P Shoes
- Q Small electrical items
- R Small household goods
- S Sports goods
- T Stationery
- U Takeaway food
- V Toys
- W Other (PLEASE WRITE IN)
- X (Don't know / varies)

**Q37** **What, if anything, would change your internet / electronic shopping preferences in the next 3 - 5 years?**  
READ OUT. ALLOW MULTIPLE ANSWERS.

- 1 Improved broadband
- 2 More / nearer click and collect services
- 3 Increased local collection points
- 4 Other (PLEASE WRITE IN)
- 5 (Don't know)
- 6 (Nothing)

**READ OUT: We now have a few questions about a range of different social and leisure activities.**

**Q38** **Which of these leisure activities do you participate in?**  
READ OUT. CAN BE MULTICODED.

1	Indoor sports or health and fitness activity	GO TO Q39 & Q40
2	Cinema	GO TO Q41 & Q42
3	Restaurant	GO TO Q43 & Q44
4	Pub / bars	GO TO Q45 & Q46
5	Nightclub	GO TO Q45 & Q46
6	Social club	GO TO Q45 & Q46
7	Ten pin bowling	GO TO Q47 & Q48
8	Swimming	GO TO Q49 & Q50
9	Theatre / concert hall	GO TO Q51 & Q52
A	Museum / art galleries	GO TO Q51 & Q52
B	Outdoor activities (such as jogging / running / cycling / 11-a-side football etc.)	GO TO Q53 & Q54
C	(None mentioned)	GO TO Q56

**ASKED TO THOSE WHO PARTICIPATE IN HEALTH AND FITNESS OR LEISURE CENTRE ACTIVITIES AT Q38**

**Q39** **Which centre / facility did you last visit for indoor sports or health and fitness activity?**  
DO NOT PROMPT. ONE ANSWER ONLY.

#Health Health List

**Q40** **How often do you visit (FACILITY MENTIONED AT Q39) for indoor sports or health and fitness activities?**  
DO NOT READ OUT. ONE ANSWER ONLY.

- 1 Daily
- 2 At least two times a week
- 3 At least once a week
- 4 At least once a fortnight
- 5 At least once a month
- 6 At least every two months
- 7 At least every 3 months
- 8 At least every 6 months
- 9 Less often than once every 6 months
- A Have only visited once
- B (Don't know / varies)

**ASKED TO THOSE WHO GO TO THE CINEMA AT Q38**  
**Q41 Which cinema did you last visit?**  
DO NOT PROMPT. ONE ANSWER ONLY.

#Cinema Cinema List

**Q42 How often do you visit (CINEMA MENTIONED AT Q41)?**  
DO NOT READ OUT. ONE ANSWER ONLY.

- 1 Daily
- 2 At least two times a week
- 3 At least once a week
- 4 At least once a fortnight
- 5 At least once a month
- 6 At least every two months
- 7 At least every 3 months
- 8 At least every 6 months
- 9 Less often than once every 6 months
- A Have only visited once
- B (Don't know / varies)

**ASKED TO THOSE WHO GO TO RESTAURANTS AT Q38**  
**Q43 Which centre / facility did you last visit to go to a restaurant?**  
DO NOT PROMPT. ONE ANSWER ONLY.

#Social Social List

**Q44 How often do you visit (FACILITY MENTIONED AT Q43) to visit a restaurant?**  
DO NOT READ OUT. ONE ANSWER ONLY.

- 1 Daily
- 2 At least two times a week
- 3 At least once a week
- 4 At least once a fortnight
- 5 At least once a month
- 6 At least every two months
- 7 At least every 3 months
- 8 At least every 6 months
- 9 Less often than once every 6 months
- A Have only visited once
- B (Don't know / varies)

**ASKED TO THOSE WHO GO TO PUB/BARS, NIGHTCLUBS OR A SOCIAL CLUB AT Q38**  
**Q45 Which centre / facility did you last visit to go to bars, pubs and nightclubs & social clubs?**  
DO NOT PROMPT. ONE ANSWER ONLY.

#Social Social List

**Q46 How often do you visit (FACILITY MENTIONED AT Q45) for bars, pubs, nightclubs & social clubs?**  
DO NOT READ OUT. ONE ANSWER ONLY.

- 1 Daily
- 2 At least two times a week
- 3 At least once a week
- 4 At least once a fortnight
- 5 At least once a month
- 6 At least every two months
- 7 At least every 3 months
- 8 At least every 6 months
- 9 Less often than once every 6 months
- A Have only visited once
- B (Don't know / varies)

**ASKED TO THOSE WHO GO TEN PIN BOWLING AT Q38**  
**Q47 Which centre / facility did you last visit to go ten-pin bowling?**  
DO NOT PROMPT. ONE ANSWER ONLY.

#TenPin Bowling List

**Q48 How often do you visit (FACILITY MENTIONED AT Q47) to go ten-pin bowling?**  
DO NOT READ OUT. ONE ANSWER ONLY.

- 1 Daily
- 2 At least two times a week
- 3 At least once a week
- 4 At least once a fortnight
- 5 At least once a month
- 6 At least every two months
- 7 At least every 3 months
- 8 At least every 6 months
- 9 Less often than once every 6 months
- A Have only visited once
- B (Don't know / varies)

**ASKED TO THOSE WHO GO TO BINGO AT Q38**  
**Q49 Which centre / facility did you last visit to go swimming?**  
DO NOT PROMPT. ONE ANSWER ONLY.

#Health Health List

**Q50 How often do you visit (FACILITY MENTIONED AT Q49) for swimming?**  
DO NOT READ OUT. ONE ANSWER ONLY.

- 1 Daily
- 2 At least two times a week
- 3 At least once a week
- 4 At least once a fortnight
- 5 At least once a month
- 6 At least every two months
- 7 At least every 3 months
- 8 At least every 6 months
- 9 Less often than once every 6 months
- A Have only visited once
- B (Don't know / varies)

**ASKED TO THOSE WHO VISIT THEATRE/CONCERT HALL; MUSEUM/ART GALLERIES AT Q38**

**Q51 Which centre / facility did you last visit for art/culture activities (i.e. theatres / galleries / museums)?**  
DO NOT PROMPT. ONE ANSWER ONLY.

#Social Social List

**Q52 How often do you visit (FACILITY MENTIONED AT Q51) for art / culture activities (i.e. theatres / galleries / museums)?**

DO NOT READ OUT. ONE ANSWER ONLY.

- 1 Daily
- 2 At least two times a week
- 3 At least once a week
- 4 At least once a fortnight
- 5 At least once a month
- 6 At least every two months
- 7 At least every 3 months
- 8 At least every 6 months
- 9 Less often than once every 6 months
- A Have only visited once
- B (Don't know / varies)

**ASKED TO THOSE WHO DO RUNNING/CYCLING/OUTDOOR ACTIVITIES AT Q38**

**Q53 Which centre / facility did you last visit for running / cycling / outdoor activities?**  
DO NOT PROMPT. ONE ANSWER ONLY.

#Health Health List

**Q54 How often do you visit (FACILITY MENTIONED AT Q53) for running / cycling / outdoor activities?**  
DO NOT READ OUT. ONE ANSWER ONLY.

- 1 Daily
- 2 At least two times a week
- 3 At least once a week
- 4 At least once a fortnight
- 5 At least once a month
- 6 At least every two months
- 7 At least every 3 months
- 8 At least every 6 months
- 9 Less often than once every 6 months
- A Have only visited once
- B (Don't know / varies)

**Q55 How do you normally travel when visiting leisure destinations?**  
DO NOT READ OUT. ONE ANSWER ONLY.

- 1 Car / van (as driver)
- 2 Car / van (as passenger)
- 3 Bus, minibus or coach
- 4 Motorcycle, scooter or moped
- 5 Walk
- 6 Taxi
- 7 Train
- 8 Metro
- 9 Bicycle
- A Mobility scooter / disability vehicle
- B Other (PLEASE WRITE IN)
- C (Don't know / varies)

**Q56** **Which leisure facilities would you like to see more of in the Causeway Coast and Glens Borough Council area?**  
DO NOT READ OUT. CAN BE MULTICODED.

- 1 Bars / pubs
- 2 Better disabled facilities
- 3 Better public transport
- 4 Better shopping facilities
- 5 Bingo
- 6 Bowling alley
- 7 Cinema
- 8 Concert hall / venue
- 9 Cycle paths / area
- A Dance facilities
- B Extreme sports
- C Health and fitness (gym)
- D Hotels
- E Ice rink
- F Indoor soft play areas
- G Karting
- H Leisure centre
- I More children facilities / activities
- J More for older people to do
- K More sports facilities (football pitches, tennis courts)
- L More walking facilities / routes
- M Museum / art galleries
- N Paintballing
- O Play spaces / park facilities
- P Restaurants
- Q Skateboarding
- R Swimming pool
- S Theatre
- P Other (PLEASE WRITE IN)
- Q (Don't know)
- R (None)

**Q57** **Which other community facilities and businesses would you like to see in the Causeway Coast and Glens Borough Council area?**  
READ LIST. CAN BE MULTICODED

- 1 Hotels
- 2 Cultural centres
- 3 Religious institutions
- 4 Tourist attractions
- 5 Other (PLEASE WRITE IN)
- 6 (Don't know)
- 7 (None)

**GEN** **Gender of respondent.**  
DO NOT READ OUT. CODE FROM OBSERVATION

- 1 Male
- 2 Female

**AGE** **Could I ask how old you are please?**  
DO NOT READ OUT. ONE ANSWER ONLY.

- 1 18 – 24 years
- 2 25 – 34 years
- 3 35 – 44 years
- 4 45 – 54 years
- 5 55 – 64 years
- 6 65+ years
- 7 (Refused)

***Thank & close.***

## Appendix C – Market Shares and Capacity Assessment

2023 Prices

Table 1a: Population and convenience goods expenditure per capita

Zone	Population					Population Growth	Convenience expenditure per capita (excluding SFT)				
	2025	2028	2031	2034	2038		2025	2028	2031	2034	2038
Zone 1	35,677	35,616	35,480	35,266	34,911	-2.1%	£3,073	£3,021	£2,985	£2,958	£2,923
Zone 2	65,066	64,955	64,708	64,318	63,669	-2.1%	£3,291	£3,235	£3,196	£3,168	£3,130
Zone 3	42,301	42,229	42,068	41,814	41,393	-2.1%	£3,075	£3,023	£2,987	£2,960	£2,925
Zone 4	16,007	15,979	15,919	15,822	15,663	-2.1%	£3,271	£3,215	£3,177	£3,149	£3,111
Zone 5	43,310	43,407	43,405	43,346	43,213	-0.2%	£3,124	£3,072	£3,035	£3,008	£2,972
Zone 6	44,663	45,388	46,025	46,612	47,371	6.1%	£2,869	£2,820	£2,786	£2,761	£2,728
Zone 7	115,406	114,894	114,145	113,233	111,879	-3.1%	£2,995	£2,944	£2,909	£2,883	£2,848
<b>Total Study Area</b>	<b>362,429</b>	<b>362,468</b>	<b>361,751</b>	<b>360,412</b>	<b>358,098</b>	<b>-1.2%</b>					

Notes:

- a. Zones are based on postal sectors as shown on the plan at Appendix A  
b. Population data is sourced from Experian App Library (Data Version UK24) and NISRA 2018-based population projections  
c. Per capita expenditure figures are derived from Experian App Library data (2024 report) at 2023 - the 2023 figures are then projected to the assessment years using "Ex. SFT adjusted for sales via stores' forecast growth rates taken from Figure 7 of Experian Retail Planner Briefing Note 22.

Table 1b: Total convenience goods expenditure available (excluding SFT)

Zones	Convenience expenditure (£m)				Growth %	
	2025	2028	2031	2034	2038	
Zone 1	£109.6	£107.6	£105.9	£104.3	£102.0	-6.9%
Zone 2	£214.1	£210.1	£206.8	£203.7	£199.3	-6.9%
Zone 3	£130.1	£127.7	£125.7	£123.8	£121.1	-6.9%
Zone 4	£52.4	£51.4	£50.6	£49.8	£48.7	-6.9%
Zone 5	£135.3	£133.3	£131.7	£130.4	£128.4	-5.1%
Zone 6	£128.1	£128.0	£128.2	£128.7	£129.2	0.9%
Zone 7	£345.6	£338.2	£332.0	£326.4	£318.7	-7.8%
<b>Total Study Area</b>	<b>£1,115.2</b>	<b>£1,096.4</b>	<b>£1,081.0</b>	<b>£1,067.2</b>	<b>£1,047.5</b>	<b>-6.1%</b>

Notes:

- a. Figures derived from multiplying per capita expenditure with population within each zone using data provided in Table 1a

Table 1c: Convenience goods expenditure split between main food shopping and top-up food shopping spend (2024) (excluding SFT)

Zones	Convenience expenditure (£m)		
	Main Food	Top-Up	Total
Zone 1	£82.2	£27.4	£109.6
Zone 2	£160.6	£53.5	£214.1
Zone 3	£97.6	£32.5	£130.1
Zone 4	£39.3	£13.1	£52.4
Zone 5	£101.5	£33.8	£135.3
Zone 6	£96.1	£32.0	£128.1
Zone 7	£259.2	£86.4	£345.6
<b>Total Study Area</b>	<b>£836.4</b>	<b>£278.8</b>	<b>£1,115.2</b>

Notes:

- a. Ratio of main food shopping to top-up food shopping is assumed to be 75:25 in line with Nexus professional judgement, as informed by the results of the NEMS household survey.

Table 2a:

Main Food - (excluding SFT)

Survey Results Shopping Patterns (%)

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
<b>Zones 1-4</b>	<b>42.1%</b>		<b>94.2%</b>	<b>98.3%</b>	<b>89.9%</b>	<b>38.7%</b>	<b>0.5%</b>	<b>7.0%</b>	<b>46.0%</b>
<b>Zone 1 - Limavady</b>	<b>11.6%</b>		<b>89.4%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>7.3%</b>
Limavady Town Centre	9.8%		73.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Main Street, Limavady	2.2%		14.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Market Street, Limavady	0.9%		6.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Main Street, Limavady	6.4%		50.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limavady Town Centre - Other	0.3%		2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limavady - Out of Centre	0.9%		8.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 1 - Out of Centre - Other	0.9%		8.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.3%
<b>Zone 2 - Coleraine</b>	<b>19.8%</b>		<b>4.8%</b>	<b>91.6%</b>	<b>18.8%</b>	<b>2.3%</b>	<b>0.0%</b>	<b>5.9%</b>	<b>28.5%</b>
Coleraine Town Centre	4.9%		0.6%	<b>26.7%</b>	<b>0.6%</b>	<b>0.6%</b>	<b>0.0%</b>	<b>0.5%</b>	<b>1.4%</b>
Iceland, Railway Road, Coleraine	0.5%		0.0%	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Bannfield Road, Coleraine	4.3%		0.6%	23.2%	0.6%	0.6%	0.0%	0.5%	0.9%
Coleraine Town Centre - Other	0.1%		0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.5%
Portrush Town Centre	0.1%		0.0%	<b>0.5%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
Portstewart Town Centre	0.0%		0.0%	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
Coleraine - Out of Centre	11.5%		3.7%	<b>46.0%</b>	<b>18.2%</b>	<b>1.7%</b>	<b>0.0%</b>	<b>4.3%</b>	<b>2.0%</b>
Asda, Ring Road, Coleraine	3.3%		1.9%	11.5%	7.2%	0.0%	0.0%	2.1%	0.0%
Centra Store (Moran's), Dunhill Road	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Riverside Retail Park	1.7%		0.0%	8.8%	0.0%	0.6%	0.0%	1.1%	0.0%
Marks & Spencer (M&S Foodhall), Riverside Retail Park	1.2%		0.0%	3.5%	5.5%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Superstore, Riverside Retail Park	4.9%		1.8%	19.7%	5.6%	1.2%	0.0%	1.1%	0.0%
Coleraine - Out of Centre - Other	0.4%		0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	2.0%
Portrush - Out of Centre	0.2%		0.0%	<b>1.1%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>2.7%</b>
Portstewart - Out of Centre	1.3%		0.6%	<b>7.2%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
Tesco Superstore, Coleraine Road, Portstewart	1.2%		0.0%	6.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Portstewart - Out of Centre - Other	0.2%		0.6%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Zone 2 - Out of Centre - Other</b>	<b>1.9%</b>		<b>0.0%</b>	<b>10.1%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>1.1%</b>	<b>22.4%</b>
<b>Zone 3 - Ballymoney</b>	<b>9.3%</b>		<b>0.0%</b>	<b>6.6%</b>	<b>69.9%</b>	<b>1.2%</b>	<b>0.5%</b>	<b>1.1%</b>	<b>5.5%</b>
Ballymoney Town Centre	8.8%		0.0%	<b>6.1%</b>	<b>67.1%</b>	<b>1.2%</b>	<b>0.0%</b>	<b>0.5%</b>	<b>1.3%</b>
Lidl, Meeting House Street, Ballymoney	1.3%		0.0%	2.3%	8.1%	0.6%	0.0%	0.0%	0.0%
Tesco Superstore, Castle Street, Ballymoney	6.3%		0.0%	3.3%	49.4%	0.6%	0.0%	0.5%	0.0%
Ballymoney Town Centre - Other	1.2%		0.0%	0.5%	9.6%	0.0%	0.0%	0.0%	1.3%
Ballymoney - Out of Centre	0.1%		0.0%	<b>0.0%</b>	<b>1.1%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>2.1%</b>
Zone 3 - Out of Centre - Other	0.4%		0.0%	0.5%	1.7%	0.0%	0.5%	0.5%	2.0%
<b>Zone 4 - The Glens</b>	<b>1.4%</b>		<b>0.0%</b>	<b>0.0%</b>	<b>1.1%</b>	<b>35.2%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>4.8%</b>
Ballycastle Town Centre	0.2%		0.0%	0.0%	0.0%	<b>5.7%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>4.8%</b>
Ballycastle - Out of Centre	0.6%		0.0%	0.0%	<b>1.1%</b>	<b>13.6%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
Zone 4 - Out of Centre - Other	0.6%		0.0%	0.0%	0.0%	<b>15.9%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
<b>Zones 5-7</b>	<b>37.7%</b>		<b>5.8%</b>	<b>1.7%</b>	<b>4.1%</b>	<b>15.4%</b>	<b>38.9%</b>	<b>23.0%</b>	<b>53.5%</b>
<b>Zone 5 - Ballymena</b>	<b>6.9%</b>		<b>0.0%</b>	<b>1.7%</b>	<b>4.1%</b>	<b>15.4%</b>	<b>38.9%</b>	<b>3.2%</b>	<b>43.2%</b>
<b>Zone 6 - Maghera</b>	<b>2.4%</b>		<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>19.8%</b>	<b>0.5%</b>
<b>Zone 7 - Londonderry</b>	<b>28.5%</b>		<b>5.8%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>9.8%</b>
<b>Outside Study Area</b>	<b>20.1%</b>		<b>0.0%</b>	<b>0.0%</b>	<b>6.0%</b>	<b>45.9%</b>	<b>60.6%</b>	<b>70.0%</b>	<b>0.5%</b>
Cookstown	1.5%		0.0%	0.0%	0.0%	0.0%	0.0%	12.6%	0.0%
Larne	0.7%		0.0%	0.0%	0.0%	19.0%	0.0%	0.0%	0.0%
Strabane	2.0%		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside Study Area - Other	15.9%		0.0%	0.0%	6.0%	26.8%	60.6%	57.4%	0.5%
<b>Total</b>	<b>100.0%</b>		<b>100.0%</b>						

Notes

a. Figures may not add up due to rounding

b. The data is derived from Appendix 1 the NEMS Report (Appendix B of the Study).

**Table 2b:**  
**Main Food - (excluding SFT)**  
**Weighted Shopping Patterns reflecting the mean spend at each location (%)**

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
<b>Zones 1-4</b>	<b>38.6%</b>		<b>92.7%</b>	<b>96.2%</b>	<b>87.6%</b>	<b>30.2%</b>	<b>0.5%</b>	<b>7.6%</b>	<b>16.9%</b>
<b>Zone 1 - Limavady</b>	<b>9.7%</b>		<b>87.1%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>10.8%</b>
Limavady Town Centre	8.1%		70.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Main Street, Limavady	1.5%		11.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Market Street, Limavady	0.8%		7.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Main Street, Limavady	5.5%		49.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limavady Town Centre - Other	0.2%		2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Limavady - Out of Centre</b>	<b>1.0%</b>		<b>10.2%</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>
Zone 1 - Out of Centre - Other	0.6%		6.4%	0.0%	0.0%	0.0%	0.0%	0.0%	10.8%
<b>Zone 2 - Coleraine</b>	<b>19.5%</b>		<b>5.6%</b>	<b>89.7%</b>	<b>21.2%</b>	<b>2.3%</b>	<b>0.0%</b>	<b>6.5%</b>	<b>3.3%</b>
Coleraine Town Centre	4.6%		0.7%	25.6%	0.6%	0.6%	0.0%	0.5%	3.3%
Iceland, Railway Road, Coleraine	0.4%		0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Banfield Road, Coleraine	4.3%		0.7%	23.5%	0.6%	0.6%	0.0%	0.5%	3.3%
Coleraine Town Centre - Other	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Portrush Town Centre</b>	<b>0.0%</b>		<b>0.0%</b>	<b>0.2%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
<b>Portstewart Town Centre</b>	<b>0.0%</b>		<b>0.0%</b>						
Coleraine - Out of Centre	12.2%		4.5%	49.8%	20.6%	1.7%	0.0%	4.9%	0.0%
Asda, Ring Road, Coleraine	4.1%		2.7%	14.6%	9.5%	0.0%	0.0%	2.6%	0.0%
Centra Store (Moran's), Dunhill Road	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Riverside Retail Park	2.3%		0.0%	12.0%	0.0%	0.8%	0.0%	1.4%	0.0%
Marks & Spencer (M&S Foodhall), Riverside Retail Park	1.2%		0.0%	3.5%	5.9%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Superstore, Riverside Retail Park	4.2%		1.8%	17.5%	5.2%	1.0%	0.0%	0.9%	0.0%
Coleraine - Out of Centre - Other	0.4%		0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Portrush - Out of Centre</b>	<b>0.1%</b>		<b>0.0%</b>	<b>0.7%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
<b>Portstewart - Out of Centre</b>	<b>1.0%</b>		<b>0.4%</b>	<b>5.7%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
Tesco Superstore, Coleraine Road, Portstewart	0.9%		0.0%	5.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Portstewart - Out of Centre - Other	0.1%		0.4%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 - Out of Centre - Other	1.4%		0.0%	7.6%	0.0%	0.0%	0.0%	1.0%	0.0%
<b>Zone 3 - Ballymoney</b>	<b>8.3%</b>		<b>0.0%</b>	<b>6.5%</b>	<b>65.2%</b>	<b>1.1%</b>	<b>0.5%</b>	<b>1.1%</b>	<b>2.8%</b>
Ballymoney Town Centre	7.8%		0.0%	5.8%	63.2%	1.1%	0.0%	0.5%	2.8%
Lidl, Meeting House Street, Ballymoney	1.4%		0.0%	2.4%	9.0%	0.6%	0.0%	0.0%	0.0%
Tesco Superstore, Castle Street, Ballymoney	5.6%		0.0%	3.0%	46.7%	0.5%	0.0%	0.5%	0.0%
Ballymoney Town Centre - Other	0.9%		0.0%	0.5%	7.4%	0.0%	0.0%	0.0%	2.8%
<b>Ballymoney - Out of Centre</b>	<b>0.1%</b>		<b>0.0%</b>	<b>0.0%</b>	<b>0.6%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
Zone 3 - Out of Centre - Other	0.4%		0.0%	0.7%	1.4%	0.0%	0.5%	0.7%	0.0%
<b>Zone 4 - The Glens</b>	<b>1.1%</b>		<b>0.0%</b>	<b>0.0%</b>	<b>1.2%</b>	<b>26.8%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
Ballycastle Town Centre	0.1%		0.0%	0.0%	0.0%	3.5%	0.0%	0.0%	0.0%
Ballycastle - Out of Centre	0.6%		0.0%	0.0%	1.2%	13.1%	0.0%	0.0%	0.0%
Zone 4 - Out of Centre - Other	0.4%		0.0%	0.0%	0.0%	10.3%	0.0%	0.0%	0.0%
<b>Zones 5-7</b>	<b>39.8%</b>		<b>7.3%</b>	<b>3.8%</b>	<b>5.6%</b>	<b>15.7%</b>	<b>35.7%</b>	<b>23.8%</b>	<b>83.1%</b>
<b>Zone 5 - Ballymena</b>	<b>7.5%</b>		<b>0.0%</b>	<b>3.8%</b>	<b>5.6%</b>	<b>15.7%</b>	<b>35.7%</b>	<b>3.1%</b>	<b>74.3%</b>
<b>Zone 6 - Maghera</b>	<b>2.6%</b>		<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>20.7%</b>	<b>1.3%</b>
<b>Zone 7 - Londonderry</b>	<b>29.7%</b>		<b>7.3%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>7.5%</b>
<b>Outside Study Area</b>	<b>21.6%</b>		<b>0.0%</b>	<b>0.0%</b>	<b>6.8%</b>	<b>54.0%</b>	<b>63.8%</b>	<b>68.6%</b>	<b>0.0%</b>
Cookstown	1.5%		0.0%	0.0%	0.0%	0.0%	0.0%	12.1%	0.0%
Larne	0.9%		0.0%	0.0%	0.0%	23.7%	0.0%	0.0%	0.0%
Strabane	1.8%		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside Study Area - Other	17.4%		0.0%	0.0%	6.8%	30.3%	63.8%	56.5%	0.0%
<b>Total</b>	<b>100.0%</b>		<b>100.0%</b>						

a. Figures may not add up due to rounding

b. The data is calculated by taking the figures in table 2a, and adjusting them pro-rata to take account of the mean spend at each location as referenced in Appendix 6 of the NEMS Report (Appendix B of the Study). There are a number of locations for which respondents refused to state their spend, and hence the total Study's mean figure is utilised in such cases.

Table 2c:

Main Food - (excluding SFT)

Expenditure based on Weighted Shopping Patterns - (2025) (£m)

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
<b>Zones 1-4</b>	<b>£379.7</b>	<b>£328.0</b>	<b>£76.2</b>	<b>£154.5</b>	<b>£85.5</b>	<b>£11.9</b>	<b>£0.5</b>	<b>£7.3</b>	<b>£43.9</b>
<b>Zone 1 - Limavady</b>	<b>£99.6</b>	<b>£71.6</b>	<b>£71.6</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£27.9</b>
Limavady Town Centre	£57.9	£57.9	£57.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Lidl, Main Street, Limavady	£9.2	£9.2	£9.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Supervalu, Market Street, Limavady	£5.9	£5.9	£5.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Main Street, Limavady	£40.8	£40.8	£40.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Limavady Town Centre - Other	£2.0	£2.0	£2.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<b>Limavady - Out of Centre</b>	<b>£8.4</b>	<b>£8.4</b>	<b>£8.4</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>
Zone 1 - Out of Centre - Other	£33.2	£5.3	£5.3	£0.0	£0.0	£0.0	£0.0	£0.0	£27.9
<b>Zone 2 - Coleraine</b>	<b>£184.9</b>	<b>£170.2</b>	<b>£4.6</b>	<b>£144.0</b>	<b>£20.6</b>	<b>£0.9</b>	<b>£0.0</b>	<b>£6.2</b>	<b>£8.5</b>
Coleraine Town Centre	£51.6	£42.6	£0.6	£41.2	£0.6	£0.2	£0.0	£0.5	£8.5
Iceland, Railway Road, Coleraine	£3.4	£3.4	£0.0	£3.4	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Bannfield Road, Coleraine	£48.2	£39.2	£0.6	£37.8	£0.6	£0.2	£0.0	£0.5	£8.5
Coleraine Town Centre - Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Portrush Town Centre	£0.3	£0.3	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0
Portstewart Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<b>Coleraine - Out of Centre</b>	<b>£109.2</b>	<b>£104.4</b>	<b>£3.7</b>	<b>£80.0</b>	<b>£20.1</b>	<b>£0.7</b>	<b>£0.0</b>	<b>£4.7</b>	<b>£0.0</b>
Asda, Ring Road, Coleraine	£37.4	£35.0	£2.2	£23.5	£9.3	£0.0	£0.0	£2.5	£0.0
Centra Store (Moran's), Dunhill Road	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Lidl, Riverside Retail Park	£21.0	£19.6	£0.0	£19.3	£0.0	£0.3	£0.0	£1.4	£0.0
Marks & Spencer (M&S Foodhall), Riverside Retail Park	£11.4	£11.4	£0.0	£5.7	£5.7	£0.0	£0.0	£0.0	£0.0
Sainsbury's Superstore, Riverside Retail Park	£35.8	£35.0	£1.5	£28.0	£5.1	£0.4	£0.0	£0.9	£0.0
Coleraine - Out of Centre - Other	£3.5	£3.5	£0.0	£3.5	£0.0	£0.0	£0.0	£0.0	£0.0
<b>Portrush - Out of Centre</b>	<b>£1.1</b>	<b>£1.1</b>	<b>£0.0</b>	<b>£1.1</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>
<b>Portstewart - Out of Centre</b>	<b>£9.5</b>	<b>£9.5</b>	<b>£0.3</b>	<b>£9.1</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>
Tesco Superstore, Coleraine Road, Portstewart	£8.6	£8.6	£0.0	£8.6	£0.0	£0.0	£0.0	£0.0	£0.0
Portstewart - Out of Centre - Other	£0.9	£0.9	£0.3	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 2 - Out of Centre - Other	£13.2	£12.2	£0.0	£12.2	£0.0	£0.0	£0.0	£1.0	£0.0
<b>Zone 3 - Ballymoney</b>	<b>£83.6</b>	<b>£74.5</b>	<b>£0.0</b>	<b>£10.5</b>	<b>£63.7</b>	<b>£0.4</b>	<b>£0.5</b>	<b>£1.1</b>	<b>£7.4</b>
Ballymoney Town Centre	£79.3	£71.5	£0.0	£9.4	£61.7	£0.4	£0.0	£0.5	£7.4
Lidl, Meeting House Street, Ballymoney	£12.9	£12.9	£0.0	£3.9	£8.8	£0.2	£0.0	£0.0	£0.0
Tesco Superstore, Castle Street, Ballymoney	£51.0	£50.6	£0.0	£4.8	£45.6	£0.2	£0.0	£0.5	£0.0
Ballymoney Town Centre - Other	£15.4	£8.0	£0.0	£0.7	£7.3	£0.0	£0.0	£0.0	£7.4
Ballymoney - Out of Centre	£0.6	£0.6	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0
Zone 3 - Out of Centre - Other	£3.7	£2.5	£0.0	£1.1	£1.4	£0.0	£0.5	£0.6	£0.0
<b>Zone 4 - The Glens</b>	<b>£11.7</b>	<b>£11.7</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£1.2</b>	<b>£10.5</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>
Ballycastle Town Centre	£1.4	£1.4	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£0.0
Ballycastle - Out of Centre	£6.3	£6.3	£0.0	£0.0	£1.2	£5.1	£0.0	£0.0	£0.0
Zone 4 - Out of Centre - Other	£4.0	£4.0	£0.0	£0.0	£4.0	£0.0	£0.0	£0.0	£0.0
<b>Zones 5-7</b>	<b>£298.2</b>	<b>£23.8</b>	<b>£6.0</b>	<b>£6.1</b>	<b>£5.5</b>	<b>£6.2</b>	<b>£36.2</b>	<b>£22.8</b>	<b>£215.3</b>
<b>Zone 5 - Ballymena</b>	<b>£249.7</b>	<b>£17.8</b>	<b>£0.0</b>	<b>£6.1</b>	<b>£5.5</b>	<b>£6.2</b>	<b>£36.2</b>	<b>£3.0</b>	<b>£192.7</b>
<b>Zone 6 - Maghera</b>	<b>£23.1</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>£19.9</b>	<b>£3.3</b>
<b>Zone 7 - Londonderry</b>	<b>£25.4</b>	<b>£6.0</b>	<b>£6.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£19.4</b>
<b>Outside Study Area</b>	<b>£158.5</b>	<b>£27.8</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£6.5</b>	<b>£21.2</b>	<b>£64.7</b>	<b>£65.9</b>	<b>£0.0</b>
Cookstown	£11.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£11.6	£0.0
Larne	£9.3	£9.3	£0.0	£0.0	£0.0	£9.3	£0.0	£0.0	£0.0
Strabane	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Outside Study Area - Other	£137.5	£18.5	£0.0	£0.0	£6.6	£11.9	£64.7	£54.3	£0.0
<b>Total</b>	<b>£836.4</b>	<b>£379.7</b>	<b>£82.2</b>	<b>£160.6</b>	<b>£97.6</b>	<b>£39.3</b>	<b>£101.5</b>	<b>£96.1</b>	<b>£259.2</b>

Table 2a:

Top-Up Food - (excluding SFT)  
Survey Results Shopping Patterns (%)

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
<b>Zones 1-4</b>	<b>47.8%</b>		<b>99.2%</b>	<b>97.2%</b>	<b>88.1%</b>	<b>89.8%</b>	<b>0.6%</b>	<b>6.4%</b>	<b>7.6%</b>
<b>Zone 1 - Limavady</b>	<b>12.2%</b>		<b>96.9%</b>	<b>0.6%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>5.6%</b>
Limavady Town Centre	5.8%		44.8%	0.6%	0.0%	0.0%	0.0%	0.0%	3.0%
Lidl, Main Street, Limavady	2.1%		19.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Market Street, Limavady	0.7%		6.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Main Street, Limavady	0.9%		8.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limavady Town Centre - Other	2.0%		9.5%	0.6%	0.0%	0.0%	0.0%	0.0%	3.0%
Limavady - Out of Centre	2.7%		24.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 1 - Out of Centre - Other	3.7%		27.2%	0.0%	0.0%	0.0%	0.0%	0.0%	2.6%
<b>Zone 2 - Coleraine</b>	<b>20.5%</b>		<b>2.4%</b>	<b>92.0%</b>	<b>12.2%</b>	<b>2.0%</b>	<b>0.0%</b>	<b>4.2%</b>	<b>2.0%</b>
Coleraine Town Centre	1.8%		0.8%	9.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Railway Road, Coleraine	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Bannfield Road, Coleraine	0.7%		0.0%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Coleraine Town Centre - Other	1.2%		0.8%	5.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Portrush Town Centre	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Portstewart Town Centre	0.8%		0.0%	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Coleraine - Out of Centre	9.5%		0.0%	39.0%	9.2%	0.7%	0.0%	2.1%	2.0%
Asda, Ring Road, Coleraine	1.2%		0.0%	6.0%	0.0%	0.7%	0.0%	0.0%	0.0%
Centra Store (Moran's), Dunhill Road	1.7%		0.0%	7.0%	2.7%	0.0%	0.0%	0.0%	0.0%
Lidl, Riverside Retail Park	0.9%		0.0%	0.0%	2.7%	0.0%	0.0%	0.0%	2.0%
Marks & Spencer (M&S Foodhall), Riverside Retail Park	1.4%		0.0%	3.6%	3.7%	0.0%	0.0%	2.1%	0.0%
Sainsbury's Superstore, Riverside Retail Park	0.1%		0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Coleraine - Out of Centre - Other	4.1%		0.0%	21.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Portrush - Out of Centre	1.8%		0.8%	7.2%	2.4%	0.0%	0.0%	0.0%	0.0%
Portstewart - Out of Centre	1.4%		0.0%	6.0%	0.0%	0.0%	0.0%	2.1%	0.0%
Tesco Superstore, Coleraine Road, Portstewart	1.0%		0.0%	4.1%	0.0%	0.0%	0.0%	2.1%	0.0%
Portstewart - Out of Centre - Other	0.4%		0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Zone 2 - Out of Centre - Other</b>	<b>5.2%</b>		<b>0.8%</b>	<b>26.3%</b>	<b>0.6%</b>	<b>1.3%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
<b>Zone 3 - Ballymoney</b>	<b>10.9%</b>		<b>0.0%</b>	<b>4.5%</b>	<b>71.6%</b>	<b>0.7%</b>	<b>0.0%</b>	<b>2.2%</b>	<b>0.0%</b>
Ballymoney Town Centre	3.6%		0.0%	2.5%	22.6%	0.0%	0.0%	0.0%	0.0%
Lidl, Meeting House Street, Ballymoney	0.4%		0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Castle Street, Ballymoney	0.8%		0.0%	0.0%	6.0%	0.0%	0.0%	0.0%	0.0%
Ballymoney Town Centre - Other	2.4%		0.0%	0.6%	16.6%	0.0%	0.0%	0.0%	0.0%
Ballymoney - Out of Centre	3.9%		0.0%	2.1%	25.7%	0.0%	0.0%	0.0%	0.0%
Zone 3 - Out of Centre - Other	3.5%		0.0%	0.0%	23.3%	0.7%	0.0%	2.2%	0.0%
<b>Zone 4 - The Glens</b>	<b>4.2%</b>		<b>0.0%</b>	<b>0.0%</b>	<b>4.4%</b>	<b>87.1%</b>	<b>0.6%</b>	<b>0.0%</b>	<b>0.0%</b>
Ballycastle Town Centre	0.4%		0.0%	0.0%	0.6%	8.4%	0.0%	0.0%	0.0%
Ballycastle - Out of Centre	1.1%		0.0%	0.0%	3.7%	13.4%	0.0%	0.0%	0.0%
Zone 4 - Out of Centre - Other	2.7%		0.0%	0.0%	0.0%	65.3%	0.6%	0.0%	0.0%
<b>Zones 5-7</b>	<b>44.1%</b>		<b>0.8%</b>	<b>2.8%</b>	<b>10.1%</b>	<b>1.3%</b>	<b>68.2%</b>	<b>64.2%</b>	<b>91.7%</b>
<b>Zone 5 - Ballymena</b>	<b>9.8%</b>		<b>0.0%</b>	<b>0.0%</b>	<b>10.1%</b>	<b>1.3%</b>	<b>67.5%</b>	<b>0.0%</b>	<b>0.0%</b>
<b>Zone 6 - Maghera</b>	<b>8.0%</b>		<b>0.0%</b>	<b>2.8%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>64.2%</b>	<b>0.0%</b>
<b>Zone 7 - Londonderry</b>	<b>26.3%</b>		<b>0.8%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.6%</b>	<b>0.0%</b>	<b>91.7%</b>
<b>Outside Study Area</b>	<b>8.1%</b>		<b>0.0%</b>	<b>0.0%</b>	<b>1.8%</b>	<b>8.9%</b>	<b>31.2%</b>	<b>29.4%</b>	<b>0.7%</b>
Cookstown	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Larne	0.3%		0.0%	0.0%	0.0%	8.2%	0.0%	0.0%	0.0%
Strabane	0.2%		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
Outside Study Area - Other	7.6%		0.0%	0.0%	1.8%	0.7%	31.2%	29.4%	0.0%
<b>Total</b>	<b>100.0%</b>		<b>100.0%</b>						

Notes

a. Figures may not add up due to rounding

b. The data is derived from Appendix 1 the NEMS Report (Appendix B of the Study).

**Table 2b:**  
**Top-Up Food - (excluding SFT)**  
**Weighted Shopping Patterns reflecting the mean spend at each location (%)**

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
<b>Zones 1-4</b>	<b>46.3%</b>		<b>99.0%</b>	<b>98.4%</b>	<b>83.1%</b>	<b>88.2%</b>	<b>1.0%</b>	<b>5.5%</b>	<b>8.7%</b>
<b>Zone 1 - Limavady</b>	<b>10.7%</b>		<b>96.0%</b>	<b>0.6%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>6.0%</b>
Limavady Town Centre	5.6%		49.6%	0.6%	0.0%	0.0%	0.0%	0.0%	3.3%
Lidl, Main Street, Limavady	2.5%		27.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Market Street, Limavady	0.6%		6.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Main Street, Limavady	0.9%		9.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limavady Town Centre - Other	1.6%		6.2%	0.6%	0.0%	0.0%	0.0%	0.0%	3.3%
<b>Limavady - Out of Centre</b>	<b>1.9%</b>		<b>20.7%</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>
Zone 1 - Out of Centre - Other	3.1%		25.7%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%
<b>Zone 2 - Coleraine</b>	<b>22.6%</b>		<b>3.0%</b>	<b>93.1%</b>	<b>12.4%</b>	<b>2.4%</b>	<b>0.0%</b>	<b>4.3%</b>	<b>2.7%</b>
Coleraine Town Centre	1.8%		0.0%	8.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Railway Road, Coleraine	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Banfield Road, Coleraine	0.7%		0.0%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Coleraine Town Centre - Other	1.1%		0.0%	5.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Portrush Town Centre	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Portstewart Town Centre	0.9%		0.0%	4.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Coleraine - Out of Centre	9.7%		0.0%	34.6%	11.8%	1.0%	0.0%	2.1%	2.7%
Asda, Ring Road, Coleraine	1.7%		0.0%	7.8%	0.0%	1.0%	0.0%	0.0%	0.0%
Centra Store (Moran's), Dunhill Road	1.9%		0.0%	7.0%	3.3%	0.0%	0.0%	0.0%	0.0%
Lidl, Riverside Retail Park	1.3%		0.0%	0.0%	4.1%	0.0%	0.0%	0.0%	2.7%
Marks & Spencer (M&S Foodhall), Riverside Retail Park	1.5%		0.0%	3.4%	4.4%	0.0%	0.0%	2.1%	0.0%
Sainsbury's Superstore, Riverside Retail Park	0.3%		0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Coleraine - Out of Centre - Other	3.1%		0.0%	15.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Portrush - Out of Centre	1.2%		0.6%	5.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Portstewart - Out of Centre	1.5%		0.0%	5.8%	0.0%	0.0%	0.0%	2.2%	0.0%
Tesco Superstore, Coleraine Road, Portstewart	1.1%		0.0%	4.2%	0.0%	0.0%	0.0%	2.2%	0.0%
Portstewart - Out of Centre - Other	0.3%		0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 - Out of Centre - Other	7.4%		2.3%	34.1%	0.6%	1.4%	0.0%	0.0%	0.0%
<b>Zone 3 - Ballymoney</b>	<b>9.3%</b>		<b>0.0%</b>	<b>4.7%</b>	<b>66.1%</b>	<b>0.3%</b>	<b>0.0%</b>	<b>1.2%</b>	<b>0.0%</b>
Ballymoney Town Centre	3.1%		0.0%	2.1%	21.9%	0.0%	0.0%	0.0%	0.0%
Lidl, Meeting House Street, Ballymoney	0.3%		0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Castle Street, Ballymoney	0.9%		0.0%	0.0%	7.0%	0.0%	0.0%	0.0%	0.0%
Ballymoney Town Centre - Other	1.9%		0.0%	0.5%	15.0%	0.0%	0.0%	0.0%	0.0%
<b>Ballymoney - Out of Centre</b>	<b>4.0%</b>		<b>0.0%</b>	<b>2.6%</b>	<b>28.1%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
Zone 3 - Out of Centre - Other	2.1%		0.0%	0.0%	16.1%	0.3%	0.0%	1.2%	0.0%
<b>Zone 4 - The Glens</b>	<b>3.8%</b>		<b>0.0%</b>	<b>0.0%</b>	<b>4.6%</b>	<b>85.6%</b>	<b>1.0%</b>	<b>0.0%</b>	<b>0.0%</b>
Ballycastle Town Centre	0.5%		0.0%	0.0%	0.9%	10.7%	0.0%	0.0%	0.0%
Ballycastle - Out of Centre	0.9%		0.0%	0.0%	3.7%	13.3%	0.0%	0.0%	0.0%
Zone 4 - Out of Centre - Other	2.4%		0.0%	0.0%	0.0%	61.6%	1.0%	0.0%	0.0%
<b>Zones 5-7</b>	<b>47.3%</b>		<b>1.0%</b>	<b>1.6%</b>	<b>16.0%</b>	<b>2.3%</b>	<b>79.8%</b>	<b>68.9%</b>	<b>90.7%</b>
<b>Zone 5 - Ballymena</b>	<b>12.5%</b>		<b>0.0%</b>	<b>0.0%</b>	<b>16.0%</b>	<b>2.3%</b>	<b>79.3%</b>	<b>0.0%</b>	<b>0.0%</b>
<b>Zone 6 - Maghera</b>	<b>8.9%</b>		<b>0.0%</b>	<b>1.6%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>68.9%</b>	<b>0.0%</b>
<b>Zone 7 - Londonderry</b>	<b>26.0%</b>		<b>1.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.4%</b>	<b>0.0%</b>	<b>90.7%</b>
<b>Outside Study Area</b>	<b>6.3%</b>		<b>0.0%</b>	<b>0.0%</b>	<b>0.9%</b>	<b>9.4%</b>	<b>19.3%</b>	<b>25.7%</b>	<b>0.6%</b>
Cookstown	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Larne	0.3%		0.0%	0.0%	0.0%	8.6%	0.0%	0.0%	0.0%
Strabane	0.2%		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
Outside Study Area - Other	5.8%		0.0%	0.0%	0.9%	0.8%	19.3%	25.7%	0.0%
<b>Total</b>	<b>100.0%</b>		<b>100.0%</b>						

a. Figures may not add up due to rounding

b. The data is calculated by taking the figures in table 2a, and adjusting them pro-rata to take account of the mean spend at each location as referenced in Appendix 6 of the NEMS Report (Appendix B of the Study). There are a number of locations for which respondents refused to state their spend, and hence the total Study's mean figure is utilised in such cases.

Table 2c:

Top-Up Food - (excluding SFT)

Expenditure based on Weighted Shopping Patterns - (2025) (£m)

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
<b>Zones 1-4</b>	<b>£127.9</b>	<b>£118.4</b>	<b>£27.1</b>	<b>£52.7</b>	<b>£27.0</b>	<b>£11.5</b>	<b>£0.3</b>	<b>£1.7</b>	<b>£7.5</b>
<b>Zone 1 - Limavady</b>	<b>£31.8</b>	<b>£26.6</b>	<b>£26.3</b>	<b>£0.3</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£5.2</b>
Limavady Town Centre	£16.8	£13.9	£13.6	£0.3	£0.0	£0.0	£0.0	£0.0	£2.8
Lidl, Main Street, Limavady	£7.5	£7.5	£7.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Supervalu, Market Street, Limavady	£1.8	£1.8	£1.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Main Street, Limavady	£2.6	£2.6	£2.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Limavady Town Centre - Other	£4.9	£2.0	£1.7	£0.3	£0.0	£0.0	£0.0	£0.0	£2.8
<b>Limavady - Out of Centre</b>	<b>£5.7</b>	<b>£5.7</b>	<b>£5.7</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>
Zone 1 - Out of Centre - Other	£9.4	£7.0	£7.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.3
<b>Zone 2 - Coleraine</b>	<b>£58.7</b>	<b>£55.0</b>	<b>£0.8</b>	<b>£49.8</b>	<b>£4.0</b>	<b>£0.3</b>	<b>£0.0</b>	<b>£1.4</b>	<b>£2.3</b>
Coleraine Town Centre	£4.6	£4.6	£0.0	£4.6	£0.0	£0.0	£0.0	£0.0	£0.0
Iceland, Railway Road, Coleraine	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Bannfield Road, Coleraine	£1.9	£1.9	£0.0	£1.9	£0.0	£0.0	£0.0	£0.0	£0.0
Coleraine Town Centre - Other	£2.7	£2.7	£0.0	£2.7	£0.0	£0.0	£0.0	£0.0	£0.0
Portrush Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Portstewart Town Centre	£2.4	£2.4	£0.0	£2.4	£0.0	£0.0	£0.0	£0.0	£0.0
<b>Coleraine - Out of Centre</b>	<b>£25.5</b>	<b>£22.5</b>	<b>£0.0</b>	<b>£18.5</b>	<b>£3.8</b>	<b>£0.1</b>	<b>£0.0</b>	<b>£0.7</b>	<b>£2.3</b>
Asda, Ring Road, Coleraine	£4.3	£4.3	£0.0	£4.2	£0.0	£0.1	£0.0	£0.0	£0.0
Centra Store (Moran's), Dunhill Road	£4.8	£4.8	£0.0	£3.7	£1.1	£0.0	£0.0	£0.0	£0.0
Lidl, Riverside Retail Park	£3.7	£1.3	£0.0	£0.0	£1.3	£0.0	£0.0	£0.0	£2.3
Marks & Spencer (M&S Foodhall), Riverside Retail Park	£3.9	£3.3	£0.0	£1.8	£1.4	£0.0	£0.0	£0.7	£0.0
Sainsbury's Superstore, Riverside Retail Park	£0.7	£0.7	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0
Coleraine - Out of Centre - Other	£8.1	£8.1	£0.0	£8.1	£0.0	£0.0	£0.0	£0.0	£0.0
<b>Portrush - Out of Centre</b>	<b>£3.0</b>	<b>£3.0</b>	<b>£0.2</b>	<b>£2.9</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>
<b>Portstewart - Out of Centre</b>	<b>£3.8</b>	<b>£3.1</b>	<b>£0.0</b>	<b>£3.1</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.7</b>	<b>£0.0</b>
Tesco Superstore, Coleraine Road, Portstewart	£2.9	£2.2	£0.0	£2.2	£0.0	£0.0	£0.0	£0.7	£0.0
Portstewart - Out of Centre - Other	£0.9	£0.9	£0.0	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0
<b>Zone 2 - Out of Centre - Other</b>	<b>£19.3</b>	<b>£19.3</b>	<b>£0.6</b>	<b>£18.3</b>	<b>£0.2</b>	<b>£0.2</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>
<b>Zone 3 - Ballymoney</b>	<b>£24.4</b>	<b>£24.1</b>	<b>£0.0</b>	<b>£2.5</b>	<b>£21.5</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.4</b>	<b>£0.0</b>
Ballymoney Town Centre	£8.3	£8.3	£0.0	£1.1	£7.1	£0.0	£0.0	£0.0	£0.0
Lidl, Meeting House Street, Ballymoney	£0.9	£0.9	£0.0	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Castle Street, Ballymoney	£2.3	£2.3	£0.0	£0.0	£2.3	£0.0	£0.0	£0.0	£0.0
Ballymoney Town Centre - Other	£5.1	£5.1	£0.0	£0.3	£4.9	£0.0	£0.0	£0.0	£0.0
<b>Ballymoney - Out of Centre</b>	<b>£10.5</b>	<b>£10.5</b>	<b>£0.0</b>	<b>£1.4</b>	<b>£9.1</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>
<b>Zone 3 - Out of Centre - Other</b>	<b>£5.6</b>	<b>£5.3</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£5.2</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.4</b>	<b>£0.0</b>
<b>Zone 4 - The Glens</b>	<b>£13.0</b>	<b>£12.7</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£1.5</b>	<b>£11.2</b>	<b>£0.3</b>	<b>£0.0</b>	<b>£0.0</b>
Ballycastle Town Centre	£1.7	£1.7	£0.0	£0.0	£0.3	£1.4	£0.0	£0.0	£0.0
<b>Ballycastle - Out of Centre</b>	<b>£2.9</b>	<b>£2.9</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£1.2</b>	<b>£1.7</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>
<b>Zone 4 - Out of Centre - Other</b>	<b>£8.4</b>	<b>£8.1</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£8.1</b>	<b>£0.3</b>	<b>£0.0</b>	<b>£0.0</b>
<b>Zones 5-7</b>	<b>£134.1</b>	<b>£6.7</b>	<b>£0.3</b>	<b>£0.9</b>	<b>£5.2</b>	<b>£0.3</b>	<b>£27.0</b>	<b>£22.1</b>	<b>£78.4</b>
<b>Zone 5 - Ballymena</b>	<b>£32.4</b>	<b>£5.5</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£5.2</b>	<b>£0.3</b>	<b>£26.8</b>	<b>£0.0</b>	<b>£0.0</b>
<b>Zone 6 - Maghera</b>	<b>£22.9</b>	<b>£0.9</b>	<b>£0.0</b>	<b>£0.9</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£22.1</b>	<b>£0.0</b>
<b>Zone 7 - Londonderry</b>	<b>£78.8</b>	<b>£0.3</b>	<b>£0.3</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.1</b>	<b>£0.0</b>	<b>£78.4</b>
<b>Outside Study Area</b>	<b>£16.8</b>	<b>£1.5</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.3</b>	<b>£1.2</b>	<b>£6.5</b>	<b>£8.2</b>	<b>£0.5</b>
Cookstown	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Larne	£1.1	£1.1	£0.0	£0.0	£0.0	£1.1	£0.0	£0.0	£0.0
Strabane	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
Outside Study Area - Other	£15.1	£0.4	£0.0	£0.0	£0.3	£0.1	£6.5	£8.2	£0.0
<b>Total</b>	<b>£278.8</b>	<b>£126.6</b>	<b>£27.4</b>	<b>£53.5</b>	<b>£32.5</b>	<b>£13.1</b>	<b>£33.8</b>	<b>£32.0</b>	<b>£86.4</b>

Table 4a:

Convenience Goods - (excluding SFT)

Weighted Shopping Patterns reflecting the mean spend at each location (%)

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
<b>Zones 1-4</b>	<b>45.5%</b>	<b>88.2%</b>	<b>94.3%</b>	<b>96.7%</b>	<b>86.5%</b>	<b>44.7%</b>	<b>0.6%</b>	<b>7.1%</b>	<b>14.9%</b>
<b>Zone 1 - Limavady</b>	<b>11.8%</b>	<b>19.4%</b>	<b>89.3%</b>	<b>0.1%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>9.6%</b>
Limavady Town Centre	6.7%	14.2%	65.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.8%
Lidl, Main Street, Limavady	1.5%	3.3%	15.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supervalu, Market Street, Limavady	0.7%	1.5%	7.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Main Street, Limavady	3.9%	8.6%	39.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Limavady Town Centre - Other	0.6%	0.8%	3.4%	0.1%	0.0%	0.0%	0.0%	0.0%	0.8%
Limavady - Out of Centre	1.3%	2.8%	12.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 1 - Out of Centre - Other	3.8%	2.4%	11.2%	0.0%	0.0%	0.0%	0.0%	0.0%	8.8%
<b>Zone 2 - Coleraine</b>	<b>21.8%</b>	<b>44.5%</b>	<b>4.9%</b>	<b>90.5%</b>	<b>19.0%</b>	<b>2.3%</b>	<b>0.0%</b>	<b>5.9%</b>	<b>3.1%</b>
Coleraine Town Centre	5.0%	9.3%	0.5%	21.4%	0.5%	0.4%	0.0%	0.4%	2.5%
Iceland, Railway Road, Coleraine	0.3%	0.7%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Bannfield Road, Coleraine	4.5%	8.1%	0.5%	18.6%	0.5%	0.4%	0.0%	0.4%	2.5%
Coleraine Town Centre - Other	0.2%	0.5%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Portrush Town Centre	0.0%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Portstewart Town Centre	0.2%	0.5%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Coleraine - Out of Centre	12.1%	25.1%	3.4%	46.0%	18.4%	1.6%	0.0%	4.2%	0.7%
Asda, Ring Road, Coleraine	3.7%	7.8%	2.0%	12.9%	7.1%	0.3%	0.0%	1.9%	0.0%
Centra Store (Moran's), Dunhill Road	0.4%	0.9%	0.0%	1.7%	0.8%	0.0%	0.0%	0.0%	0.0%
Lidl, Riverside Retail Park	2.2%	4.1%	0.0%	9.0%	1.0%	0.6%	0.0%	1.1%	0.7%
Marks & Spencer (M&S Foodhall), Riverside Retail Park	1.4%	2.9%	0.0%	3.5%	5.5%	0.0%	0.0%	0.5%	0.0%
Sainsbury's Superstore, Riverside Retail Park	3.3%	7.1%	1.3%	13.4%	3.9%	0.7%	0.0%	0.7%	0.0%
Coleraine - Out of Centre - Other	1.0%	2.3%	0.0%	5.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Portrush - Out of Centre	0.4%	0.8%	0.2%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Portstewart - Out of Centre	1.2%	2.5%	0.3%	5.7%	0.0%	0.0%	0.0%	0.6%	0.0%
Tesco Superstore, Coleraine Road, Portstewart	1.0%	2.1%	0.0%	5.1%	0.0%	0.0%	0.0%	0.6%	0.0%
Portstewart - Out of Centre - Other	0.2%	0.3%	0.3%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Zone 2 - Out of Centre - Other</b>	<b>2.9%</b>	<b>6.2%</b>	<b>0.6%</b>	<b>14.3%</b>	<b>0.1%</b>	<b>0.3%</b>	<b>0.0%</b>	<b>0.8%</b>	<b>0.0%</b>
<b>Zone 3 - Ballymoney</b>	<b>9.7%</b>	<b>19.5%</b>	<b>0.0%</b>	<b>6.1%</b>	<b>65.5%</b>	<b>0.9%</b>	<b>0.4%</b>	<b>1.1%</b>	<b>2.1%</b>
Ballymoney Town Centre	7.9%	15.8%	0.0%	4.9%	52.9%	0.8%	0.0%	0.4%	2.1%
Lidl, Meeting House Street, Ballymoney	1.2%	2.7%	0.0%	2.2%	6.8%	0.4%	0.0%	0.0%	0.0%
Tesco Superstore, Castle Street, Ballymoney	4.8%	10.4%	0.0%	2.2%	36.8%	0.4%	0.0%	0.4%	0.0%
Ballymoney Town Centre - Other	1.8%	2.6%	0.0%	0.5%	9.3%	0.0%	0.0%	0.0%	2.1%
Ballymoney - Out of Centre	1.0%	2.2%	0.0%	0.6%	7.5%	0.0%	0.0%	0.0%	0.0%
Zone 3 - Out of Centre - Other	0.8%	1.5%	0.0%	0.5%	5.1%	0.1%	0.4%	0.8%	0.0%
<b>Zone 4 - The Glens</b>	<b>2.2%</b>	<b>4.8%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>2.1%</b>	<b>41.5%</b>	<b>0.2%</b>	<b>0.0%</b>	<b>0.0%</b>
Ballycastle Town Centre	0.3%	0.6%	0.0%	0.0%	0.2%	5.3%	0.0%	0.0%	0.0%
Ballycastle - Out of Centre	0.8%	1.8%	0.0%	0.0%	1.8%	13.1%	0.0%	0.0%	0.0%
Zone 4 - Out of Centre - Other	1.1%	2.4%	0.0%	0.0%	0.0%	23.1%	0.2%	0.0%	0.0%
<b>Zones 5-7</b>	<b>38.8%</b>	<b>6.0%</b>	<b>5.7%</b>	<b>3.3%</b>	<b>8.2%</b>	<b>12.4%</b>	<b>46.7%</b>	<b>35.0%</b>	<b>85.0%</b>
<b>Zone 5 - Ballymena</b>	<b>25.3%</b>	<b>4.6%</b>	<b>0.0%</b>	<b>2.9%</b>	<b>8.2%</b>	<b>12.4%</b>	<b>46.6%</b>	<b>2.3%</b>	<b>55.8%</b>
<b>Zone 6 - Maghera</b>	<b>4.1%</b>	<b>0.2%</b>	<b>0.0%</b>	<b>0.4%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>32.7%</b>	<b>0.9%</b>
<b>Zone 7 - Londonderry</b>	<b>9.3%</b>	<b>1.2%</b>	<b>5.7%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.1%</b>	<b>0.0%</b>	<b>28.3%</b>
<b>Outside Study Area</b>	<b>15.7%</b>	<b>5.8%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>5.3%</b>	<b>42.9%</b>	<b>52.7%</b>	<b>57.9%</b>	<b>0.2%</b>
Cookstown	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.1%	0.0%
Larne	0.9%	2.1%	0.0%	0.0%	0.0%	19.9%	0.0%	0.0%	0.0%
Strabane	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Outside Study Area - Other	13.7%	3.7%	0.0%	0.0%	5.3%	22.9%	52.7%	48.8%	0.0%
<b>Total</b>	<b>100.0%</b>								

Notes

a. Figures may not add up due to rounding

b. The data is calculated by taking the figures in table 2a, and adjusting them pro-rata to take account of the mean spend at each location as referenced in Appendix 6 the NEMS Report (Appendix B of the Study). There are a number of locations for which respondents refused to state their spend, and hence the total Study's mean figure is utilised in such cases.

Table 4b:

Convenience Goods - (excluding SFT)

Expenditure based on Weighted Shopping Patterns - (£m)

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
<b>Zones 1-4</b>	<b>£507.7</b>	<b>£446.4</b>	<b>£103.4</b>	<b>£207.1</b>	<b>£112.5</b>	<b>£23.4</b>	<b>£0.9</b>	<b>£9.1</b>	<b>£51.4</b>
<b>Zone 1 - Limavady</b>	<b>£131.4</b>	<b>£98.2</b>	<b>£97.9</b>	<b>£0.3</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£33.1</b>
Limavady Town Centre	£74.7	£71.8	£71.5	£0.3	£0.0	£0.0	£0.0	£0.0	£2.8
Lidl, Main Street, Limavady	£16.7	£16.7	£16.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Supervalu, Market Street, Limavady	£7.7	£7.7	£7.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Main Street, Limavady	£43.5	£43.5	£43.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Limavady Town Centre - Other	£6.8	£4.0	£3.7	£0.3	£0.0	£0.0	£0.0	£0.0	£2.8
<b>Limavady - Out of Centre</b>	<b>£14.1</b>	<b>£14.1</b>	<b>£14.1</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>Zone 1 - Out of Centre - Other</b>	<b>£42.6</b>	<b>£12.3</b>	<b>£12.3</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£30.3</b>
<b>Zone 2 - Coleraine</b>	<b>£243.6</b>	<b>£225.1</b>	<b>£5.4</b>	<b>£193.8</b>	<b>£24.7</b>	<b>£1.2</b>	<b>£0.0</b>	<b>£7.6</b>	<b>£10.9</b>
Coleraine Town Centre	£56.2	£47.2	£0.6	£45.8	£0.6	£0.2	£0.0	£0.5	£8.5
Iceland, Railway Road, Coleraine	£3.4	£3.4	£0.0	£3.4	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Bannfield Road, Coleraine	£50.1	£41.1	£0.6	£39.7	£0.6	£0.2	£0.0	£0.5	£8.5
Coleraine Town Centre - Other	£2.7	£2.7	£0.0	£2.7	£0.0	£0.0	£0.0	£0.0	£0.0
Portrush Town Centre	£0.3	£0.3	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0
Portstewart Town Centre	£2.4	£2.4	£0.0	£2.4	£0.0	£0.0	£0.0	£0.0	£0.0
Coleraine - Out of Centre	£134.6	£126.9	£3.7	£98.5	£23.9	£0.8	£0.0	£5.4	£2.3
Asda, Ring Road, Coleraine	£41.7	£39.3	£2.2	£27.6	£9.3	£0.1	£0.0	£2.5	£0.0
Centra Store (Moran's), Dunhill Road	£4.8	£4.8	£0.0	£3.7	£1.1	£0.0	£0.0	£0.0	£0.0
Lidl, Riverside Retail Park	£24.6	£21.0	£0.0	£19.3	£1.3	£0.3	£0.0	£1.4	£2.3
Marks & Spencer (M&S Foodhall), Riverside Retail Park	£15.3	£14.6	£0.0	£7.5	£7.1	£0.0	£0.0	£0.7	£0.0
Sainsbury's Superstore, Riverside Retail Park	£36.6	£35.7	£1.5	£28.8	£5.1	£0.4	£0.0	£0.9	£0.0
Coleraine - Out of Centre - Other	£11.6	£11.6	£0.0	£11.6	£0.0	£0.0	£0.0	£0.0	£0.0
Portrush - Out of Centre	£4.2	£4.2	£0.2	£4.0	£0.0	£0.0	£0.0	£0.0	£0.0
Portstewart - Out of Centre	£13.3	£12.6	£0.3	£12.2	£0.0	£0.0	£0.0	£0.7	£0.0
Tesco Superstore, Coleraine Road, Portstewart	£11.6	£10.8	£0.0	£10.8	£0.0	£0.0	£0.0	£0.7	£0.0
Portstewart - Out of Centre - Other	£1.7	£1.7	£0.3	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0
<b>Zone 2 - Out of Centre - Other</b>	<b>£32.5</b>	<b>£31.5</b>	<b>£0.6</b>	<b>£30.5</b>	<b>£0.2</b>	<b>£0.2</b>	<b>£0.0</b>	<b>£1.0</b>	<b>£0.0</b>
<b>Zone 3 - Ballymoney</b>	<b>£108.0</b>	<b>£98.6</b>	<b>£0.0</b>	<b>£13.0</b>	<b>£85.2</b>	<b>£0.5</b>	<b>£0.5</b>	<b>£1.5</b>	<b>£7.4</b>
Ballymoney Town Centre	£87.6	£79.8	£0.0	£10.5	£68.8	£0.4	£0.0	£0.5	£7.4
Lidl, Meeting House Street, Ballymoney	£13.8	£13.8	£0.0	£4.8	£8.8	£0.2	£0.0	£0.0	£0.0
Tesco Superstore, Castle Street, Ballymoney	£53.3	£52.8	£0.0	£4.8	£47.9	£0.2	£0.0	£0.5	£0.0
Ballymoney Town Centre - Other	£20.5	£13.1	£0.0	£1.0	£12.1	£0.0	£0.0	£0.0	£7.4
Ballymoney - Out of Centre	£11.1	£11.1	£0.0	£1.4	£9.7	£0.0	£0.0	£0.0	£0.0
Zone 3 - Out of Centre - Other	£9.3	£7.7	£0.0	£1.1	£6.6	£0.0	£0.5	£1.0	£0.0
<b>Zone 4 - The Glens</b>	<b>£24.7</b>	<b>£24.4</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£2.7</b>	<b>£21.7</b>	<b>£0.3</b>	<b>£0.0</b>	<b>£0.0</b>
Ballycastle Town Centre	£3.0	£3.0	£0.0	£0.0	£0.3	£2.8	£0.0	£0.0	£0.0
Ballycastle - Out of Centre	£9.3	£9.3	£0.0	£0.0	£2.4	£6.9	£0.0	£0.0	£0.0
Zone 4 - Out of Centre - Other	£12.4	£12.1	£0.0	£0.0	£0.0	£12.1	£0.3	£0.0	£0.0
<b>Zones 5-7</b>	<b>£432.3</b>	<b>£30.5</b>	<b>£6.3</b>	<b>£7.0</b>	<b>£10.7</b>	<b>£6.5</b>	<b>£63.2</b>	<b>£44.9</b>	<b>£293.7</b>
<b>Zone 5 - Ballymena</b>	<b>£282.1</b>	<b>£23.3</b>	<b>£0.0</b>	<b>£6.1</b>	<b>£10.7</b>	<b>£6.5</b>	<b>£63.1</b>	<b>£3.0</b>	<b>£192.7</b>
<b>Zone 6 - Maghera</b>	<b>£46.1</b>	<b>£0.9</b>	<b>£0.0</b>	<b>£0.9</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£41.9</b>	<b>£3.3</b>
<b>Zone 7 - Londonderry</b>	<b>£104.2</b>	<b>£6.3</b>	<b>£6.3</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.1</b>	<b>£0.0</b>	<b>£97.7</b>
<b>Outside Study Area</b>	<b>£175.3</b>	<b>£29.3</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£6.9</b>	<b>£22.5</b>	<b>£71.2</b>	<b>£74.2</b>	<b>£0.5</b>
Cookstown	£11.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£11.6	£0.0
Larne	£10.4	£10.4	£0.0	£0.0	£0.0	£10.4	£0.0	£0.0	£0.0
Strabane	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
Outside Study Area - Other	£152.6	£18.9	£0.0	£0.0	£6.9	£12.0	£71.2	£62.5	£0.0
<b>Total</b>	<b>£1,115.2</b>	<b>£506.2</b>	<b>£109.6</b>	<b>£214.1</b>	<b>£130.1</b>	<b>£52.4</b>	<b>£135.3</b>	<b>£128.1</b>	<b>£345.6</b>

Table 5: Convenience goods benchmark (2025)

Destination	Gross Retail Floorspace (sq m)	Net Sales Area (sq m)	Net Convenience Sales Area (sq m)	Sales Density (£ per sq m)	Benchmark Turnover (£m)	Survey Turnover (£m)	Survey Turnover (With Inflow from Beyond Study Area) (£m)	Trading Position against Benchmark (£m)	Trading Position against Benchmark (%)
<b>Zones 1-4</b>									
<b>Zone 1 - Limavady</b>									
Limavady Town Centre					£437.7	£507.7	£530.0	£92.3	21.1%
Lidl, Main Street, Limavady	1,300	845	690	£8,883	£104.4	£131.4	£131.4	£26.9	25.8%
Supervalu, Market Street, Limavady					£67.7	£74.7	£74.7	£6.9	56.4%
Tesco Superstore, Main Street, Limavady	3,374	2,193	1,611	£16,789	£6.1	£16.7	£16.7	£10.5	171.7%
Limavady Town Centre - Other					£7.7	£7.7	£7.7	£0.0	0.0%
Limavady - Out of Centre					£27.1	£42.5	£42.5	£16.4	60.6%
Zone 1 - Out of Centre - Other					£6.8	£6.8	£6.8	£0.0	0.0%
Zone 1 - Out of Centre - Other					£14.1	£14.1	£14.1	£0.0	0.0%
Zone 1 - Out of Centre - Other					£42.6	£42.6	£42.6	£0.0	0.0%
<b>Zone 2 - Coleraine</b>									
Coleraine Town Centre					£42.7	£56.2	£61.9	£19.2	45.0%
Asda, Railway Road, Coleraine	673	437	399	£7,429	£3.0	£3.4	£3.7	£0.7	25.1%
Tesco Superstore, Bannfield Road, Coleraine	4,578	2,976	2,186	£16,789	£36.7	£50.1	£55.2	£18.5	50.3%
Coleraine Town Centre - Other					£3.0	£2.7	£3.0	£0.0	0.0%
Portrush Town Centre					£0.3	£0.3	£0.3	£0.0	0.0%
Portstewart Town Centre					£2.7	£2.4	£2.7	£0.0	0.0%
Coleraine - Out of Centre					£120.1	£134.6	£148.1	£28.0	23.3%
Asda, Ring Road, Coleraine	7,355	4,781	3,387	£11,491	£38.9	£41.7	£45.9	£7.0	18.0%
Centra Store (Morans), Dunhill Road					£5.3	£4.8	£5.3	£0.0	0.0%
Lidl, Riverside Retail Park	2,475	1,752	1,431	£8,883	£12.7	£24.6	£27.1	£14.4	113.3%
Marks & Spencer (M&S Foodhall), Riverside Retail Park	1,068	1,753	1,520	£11,313	£17.2	£15.3	£16.8	£-0.4	-2.1%
Sainsbury's Superstore, Riverside Retail Park	4,739	3,080	2,320	£14,350	£33.3	£36.6	£40.2	£6.9	20.8%
Coleraine - Out of Centre - Other					£12.7	£11.6	£12.7	£0.0	0.0%
Portrush - Out of Centre					£4.6	£4.2	£4.6	£0.0	0.0%
Portstewart - Out of Centre					£15.7	£13.3	£14.6	£-1.1	-6.8%
Tesco Superstore, Coleraine Road, Portstewart	1,717	1,116	820	£16,789	£13.8	£11.6	£12.7	£-1.1	-7.7%
Portstewart - Out of Centre - Other					£1.9	£1.7	£1.9	£0.0	0.0%
Zone 2 - Out of Centre - Other					£32.5	£32.5	£32.5	£0.0	0.0%
<b>Zone 3 - Ballymoney</b>									
Ballymoney Town Centre					£88.7	£108.0	£108.0	£19.3	21.7%
Lidl, Meeting House Street, Ballymoney	2,203	1,432	1,170	£8,883	£68.3	£87.6	£87.6	£19.3	28.2%
Tesco Superstore, Castle Street, Ballymoney	4,670	3,036	2,230	£16,789	£10.4	£13.8	£13.8	£3.4	32.9%
Ballymoney Town Centre - Other					£37.4	£53.3	£53.3	£15.8	42.3%
Ballymoney - Out of Centre					£20.5	£20.5	£20.5	£0.0	0.0%
Zone 3 - Out of Centre - Other					£11.1	£11.1	£11.1	£0.0	0.0%
Zone 3 - Out of Centre - Other					£9.3	£9.3	£9.3	£0.0	0.0%
<b>Zone 4 - The Glen</b>									
Ballycastle Town Centre					£26.0	£24.7	£26.0	£0.0	0.0%
Ballycastle - Out of Centre					£3.4	£3.0	£3.4	£0.0	0.0%
Zone 4 - Out of Centre - Other					£10.2	£9.3	£10.2	£0.0	0.0%
Zone 4 - Out of Centre - Other					£12.4	£12.4	£12.4	£0.0	0.0%

Notes:

- a. Due to the level of data available, the benchmarking exercise is informed by research collected in relation to the larger national supermarket operators only (namely Tesco, Sainsbury, Asda, Morrisons, Co-op, Waitrose, M&S, Aldi and Lidl), based on the destinations listed in Tables 2 and 3 - the relevant stores are shown in blue. Assumption is made
- b. The gross retail floorspace has been sourced from the Land and Property Services Valuation Services tool.
- c. Net sales area is based on Nexus Planning professional judgement.
- d. The proportion of net floorspace dedicated to convenience goods sales is taken from the company benchmark average (sourced from GlobalData 2024).
- e. The survey turnover is taken from GlobalData 2024.
- f. For stores where average sales densities are known, the benchmark convenience turnover is calculated by multiplying the sales area by the sales density. It is assumed that all other stores are 'trading at equilibrium' (i.e. their 'benchmark' turnover equates to that identified by the survey in Table 4b).
- g. Survey derived performance of stores is sourced from Table 4b.
- h. Figures may not add up due to rounding
- i. 2023 prices

Capacity Findings - Causeway Coast & Glens Borough

Table 6a-a: Convenience goods market share derived turnover (based on household survey results, as weighted)

	% Market Share	2025 Survey Turnover (£m)	2028 Survey Turnover (£m)	2031 Survey Turnover (£m)	2034 Survey Turnover (£m)	2038 Survey Turnover (£m)
Expenditure in the Study Area (£m)		£1,115.2	£1,096.4	£1,081.0	£1,067.2	£1,047.5
Expenditure directed to Causeway Coast and Glens	45.5%	£507.7	£499.1	£492.1	£485.8	£476.8

Notes:

a. Market Share percentage figures are derived from Table 4a. This is then applied to the total convenience goods expenditure available (excluding SFT) as taken from Table 1b

Table 6b-a: Convenience goods market share derived turnover, and assumed inflow from outside of the Study Area (£m)

	Estimated 'Inflow' from Outside Study Area (%)	2025 Turnover with Inflow (£m)	2028 Turnover with Inflow (£m)	2031 Turnover with Inflow (£m)	2034 Turnover with Inflow (£m)	2038 Turnover with Inflow (£m)
Expenditure directed to Causeway Coast and Glens	4.40%	£530.0	£521.0	£513.7	£507.2	£497.8

Notes:

a. The inflow figures have been estimated by Nexus. This is then applied to the survey turnover as presented in Table 6a.

Table 6c-a: Benchmark Turnovers (£m)

	2025 Benchmark Turnover (£m)	2028 Benchmark Turnover (£m)	2031 Benchmark Turnover (£m)	2034 Benchmark Turnover (£m)	2038 Benchmark Turnover (£m)
Causeway Coast and Glens	£437.7	£437.7	£437.7	£436.4	£434.7

Notes:

a. Benchmark turnover figure at 2024 is sourced from Table 5. It is then "grown" to the respective years using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

Table 6d-a: Extant convenience goods commitments

Site Address	Application Reference	Summary of the Proposal	Net* Convenience Floorspace (sqm)	Estimated Sales Density (£ per sq m) at 2025	Estimated Convenience Turnover (£m) - 2025	Estimated Convenience Turnover (£m) - 2028	Estimated Convenience Turnover (£m) - 2031	Estimated Convenience Turnover (£m) - 2034	Estimated Convenience Turnover (£m) - 2038
Limavady Local Centre Bally Spar, Unit 1-2 Anderson Park	LA01/2022/1588/F	Extension of Existing Shop at Ground Floor Level Along with a New Lift to an Existing First Floor Level. Adjustments to Car Parking & Associated Site Works. Net increase of 229 sqm convenience floorspace.	229	£8,000	£1.8	£1.8	£1.8	£1.8	£1.8
Causeway Coast and Glens			229		£1.8	£1.8	£1.8	£1.8	£1.8

Notes:

a. The list of commitments and the associated net sales areas have been provided by the Council.

b. Sales density is assumed to be £8,000 based on Nexus Planning judgement.

c. The turnover for respective years is "grown" using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

Causeway Coast & Glens Retail Capacity Assessment

Nexus Planning

2023 Prices

Table 7a-a: Convenience Goods Capacity Assessment

	2025	2028	2031	2034	2038
STEP 1: Survey Derived (with inflow) Turnover of all Floorspace (£m);	£530.0	£512.0	£513.7	£507.2	£497.8
STEP 2: Total Forecast "Benchmark" Turnover of all Floorspace (£m)	£437.7	£437.7	£437.7	£436.4	£434.7
STEP 3: Available Expenditure before commitments (£m)	£83.3	£76.0	£76.0	£70.8	£63.1
STEP 4: Turnover of all committed floorspace (£m)	£1.8	£1.8	£1.8	£1.8	£1.8
STEP 5: Surplus Expenditure (£m)	£81.5	£74.2	£69.0	£61.3	
STEP 6: MAXIMUM FORECAST CAPACITY FOR NEW CONVENIENCE FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,519	£10,519	£10,519	£10,488	£10,446
(ii) MAXIMUM "Net" Floorspace Capacity (sq m):	7,700	7,100	6,600	5,900	
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	
(iv) Gross Floorspace Capacity (sq m):	11000	10143	9429	8,429	
STEP 7: MINIMUM FORECAST CAPACITY FOR NEW CONVENIENCE FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£13,481	£13,481	£13,481	£13,441	£13,387
(ii) MINIMUM "Net" Floorspace Capacity (sq m):	6,000	5,500	5,100	4,600	
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	
(iv) Gross Floorspace Capacity (sq m):	8,571	7,857	7,286	6,571	

Notes

STEP 1: Survey Derived (with Inflow) turnover is derived from Table 6b.

STEP 2: Benchmark Turnover is derived from Table 6a.

STEP 3: Available Expenditure before commitments is derived from Steps 1 and 2.

STEP 4: The turnover of all known commitments has been derived from Table 6d. It is assumed that all commitments would be operational and with mature trading conditions by 2028.

STEP 5: Surplus Expenditure incorporates the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement utilising the average sales density of deep discounter operators (Aldi and Lidl) as sourced from GlobalData 2024. The sales density for respective years is "grown" using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

STEP 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement utilising the average sales density of Top 4 operators (Asda, Tesco, Sainsbury's and Morrisons) as sourced from GlobalData 2024. The sales density for respective years is "grown" using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

Capacity Findings - Coleraine

Table 6a-b: Convenience goods market share derived turnover (based on household survey results, as weighted)

	% Market Share	2025 Survey Turnover (£m)	2028 Survey Turnover (£m)	2031 Survey Turnover (£m)	2034 Survey Turnover (£m)	2038 Survey Turnover (£m)
Expenditure in the Study Area (£m)		£1,115.2	£1,096.4	£1,081.0	£1,067.2	£1,047.5
Expenditure directed to Coleraine	17.1%	£190.9	£187.6	£185.0	£182.7	£179.3

Notes:

a. Market Share percentage figures are derived from Table 4a. This is then applied to the total convenience goods expenditure available (excluding SFT) as taken from Table 1b

Table 6b-b: Convenience goods market share derived turnover, and assumed inflow from outside of the Study Area (£m)

	Estimated 'Inflow' from Outside Study Area (%)	2025 Turnover with Inflow (£m)	2028 Turnover with Inflow (£m)	2031 Turnover with Inflow (£m)	2034 Turnover with Inflow (£m)	2038 Turnover with Inflow (£m)
Expenditure directed to Coleraine	10.00%	£210.0	£206.4	£203.5	£200.9	£197.2

Notes:

a. The inflow figures have been estimated by Nexus. This is then applied to the survey turnover as presented in Table 6a.

Table 6c-b: Benchmark Turnovers (£m)

	2025 Benchmark Turnover (£m)	2028 Benchmark Turnover (£m)	2031 Benchmark Turnover (£m)	2034 Benchmark Turnover (£m)	2038 Benchmark Turnover (£m)
Coleraine	£162.8	£162.8	£162.8	£162.3	£161.7

Notes:

a. Benchmark turnover figure at 2024 is sourced from Table 5. It is then "grown" to the respective years using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

Causeway Coast & Glens Retail Capacity Assessment

Nexus Planning

2023 Prices

Table 7a-b: Convenience Goods Capacity Assessment

	2025	2028	2031	2034	2038
STEP 1: Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£210.0	£206.4	£203.5	£200.9	£197.2
STEP 2: Total Forecast "Benchmark" Turnover of all Floorspace (£m)	£162.8	£162.8	£162.8	£162.3	£161.7
STEP 3: Available Expenditure before commitments (£m)		£43.6	£40.7	£38.6	£35.6
STEP 4: Turnover of all committed floorspace (£m)		£0.0	£0.0	£0.0	£0.0
STEP 5: Surplus Expenditure (£m)		£43.6	£40.7	£38.6	£35.6
STEP 6: MAXIMUM FORECAST CAPACITY FOR NEW CONVENIENCE FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,519	£10,519	£10,519	£10,488	£10,446
(ii) MAXIMUM "Net" Floorspace Capacity (sq m):	4,100	3,900	3,700	3,400	
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	5857	5571	5286	4,857	
STEP 7: MINIMUM FORECAST CAPACITY FOR NEW CONVENIENCE FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£13,481	£13,481	£13,481	£13,441	£13,387
(ii) MINIMUM "Net" Floorspace Capacity (sq m):	3,200	3,000	2,900	2,700	
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	4,571	4,286	4,143	3,857	

Notes

STEP 1: Survey Derived (with Inflow) turnover is derived from Table 6b.

STEP 2: Benchmark Turnover is derived from Table 6c

STEP 3: Available Expenditure before commitments is derived from Steps 1 and 2.

STEP 4: The turnover of all known commitments has been derived from Table 6d. It is assumed that all commitments would be operational and with mature trading conditions by 2028.

STEP 5: Surplus Expenditure incorporates the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement utilising the average sales density of deep discounter operators (Aldi and Lidl) as sourced from GlobalData 2024. The sales density for respective years is "grown" using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

STEP 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement utilising the average sales density of Top 4 operators (Asda, Tesco, Sainsbury's and Morrisons) as sourced from GlobalData 2024. The sales density for respective years is "grown" using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

Capacity Findings - Limavady

Table 6a-c: Convenience goods market share derived turnover (based on household survey results, as weighted)

	% Market Share	2025 Survey Turnover (£m)	2028 Survey Turnover (£m)	2031 Survey Turnover (£m)	2034 Survey Turnover (£m)	2038 Survey Turnover (£m)
Expenditure in the Study Area (£m)		£1,115.2	£1,096.4	£1,081.0	£1,067.2	£1,047.5
Expenditure directed to Limavady	8.0%	£88.8	£87.3	£86.0	£84.9	£83.4

Notes:

a. Market Share percentage figures are derived from Table 4a. This is then applied to the total convenience goods expenditure available (excluding SFT) as taken from Table 1b

Table 6b-c: Convenience goods market share derived turnover, and assumed inflow from outside of the Study Area (£m)

	Estimated 'Inflow' from Outside Study Area (%)	2025 Turnover with Inflow (£m)	2028 Turnover with Inflow (£m)	2031 Turnover with Inflow (£m)	2034 Turnover with Inflow (£m)	2038 Turnover with Inflow (£m)
Expenditure directed to Limavady	0.00%	£88.8	£87.3	£86.0	£84.9	£83.4

Notes:

a. The inflow figures have been estimated by Nexus. This is then applied to the survey turnover as presented in Table 6a.

Table 6c-c: Benchmark Turnovers (£m)

	2025 Benchmark Turnover (£m)	2028 Benchmark Turnover (£m)	2031 Benchmark Turnover (£m)	2034 Benchmark Turnover (£m)	2038 Benchmark Turnover (£m)
Limavady	£61.8	£61.8	£61.8	£61.7	£61.4

Notes:

a. Benchmark turnover figure at 2024 is sourced from Table 5. It is then "grown" to the respective years using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

Table 6d-c: Extant convenience goods commitments

Site Address	Application Reference	Summary of the Proposal	Net* Convenience Floorspace (sqm)	Estimated Sales Density (£ per sq m) at 2025	Estimated Convenience Turnover (£m) - 2025	Estimated Convenience Turnover (£m) - 2028	Estimated Convenience Turnover (£m) - 2031	Estimated Convenience Turnover (£m) - 2034	Estimated Convenience Turnover (£m) - 2038
Limavady Local Centre Bally Spar, Unit 1-2 Anderson Park	LA01/2022/1588/F	Extension of Existing Shop at Ground Floor Level Along with a New Lift to an Existing First Floor Level. Adjustments to Car Parking & Associated Site Works. Net increase of 229 sqm convenience floorspace.	229	£8,000	£1.8	£1.8	£1.8	£1.8	£1.8
Limavady			229		£1.8	£1.8	£1.8	£1.8	£1.8

Notes:

a. The list of commitments and the associated net sales areas have been provided by the Council.

b. Sales density is assumed to be £8,000 based on Nexus Planning judgement.

c. The turnover for respective years is "grown" using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

Causeway Coast & Glens Retail Capacity Assessment

Nexus Planning

2023 Prices

Table 7a-c: Convenience Goods Capacity Assessment

	2025	2028	2031	2034	2038
STEP 1: Survey Derived (with inflow) Turnover of all Floorspace (£m):	£88.8	£87.3	£86.0	£84.9	£83.4
STEP 2: Total Forecast "Benchmark" Turnover of all Floorspace (£m)	£61.8	£61.8	£61.8	£61.7	£61.4
STEP 3: Available Expenditure before commitments (£m)		£25.4	£24.2	£23.3	£22.0
STEP 4: Turnover of all committed floorspace (£m)		£1.8	£1.8	£1.8	£1.8
STEP 5: Surplus Expenditure (£m)		£23.6	£22.4	£21.5	£20.1
STEP 6: MAXIMUM FORECAST CAPACITY FOR NEW CONVENIENCE FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,519	£10,519	£10,519	£10,488	£10,446
(ii) MAXIMUM "Net" Floorspace Capacity (sq m):		2,200	2,100	2,000	1,900
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		3143	3000	2857	2,714
STEP 7: MINIMUM FORECAST CAPACITY FOR NEW CONVENIENCE FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£13,481	£13,481	£13,481	£13,441	£13,387
(ii) MINIMUM "Net" Floorspace Capacity (sq m):		1,800	1,700	1,600	1,500
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		2,571	2429	2,286	2,143

Notes

STEP 1: Survey Derived (with Inflow) turnover is derived from Table 6b.

STEP 2: Benchmark Turnover is derived from Table 6a

STEP 3: Available Expenditure before commitments is derived from Steps 1 and 2.

STEP 4: The turnover of all known commitments has been derived from Table 6d. It is assumed that all commitments would be operational and with mature trading conditions by 2028.

STEP 5: Surplus Expenditure incorporates the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement utilising the average sales density of deep discounter operators (Aldi and Lidl) as sourced from GlobalData 2024. The sales density for respective years is "grown" using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

STEP 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement utilising the average sales density of Top 4 operators (Asda, Tesco, Sainsbury's and Morrisons) as sourced from GlobalData 2024. The sales density for respective years is "grown" using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

Capacity Findings - Portrush

Table 6a-d: Convenience goods market share derived turnover (based on household survey results, as weighted)

	% Market Share	2025 Survey Turnover (£m)	2028 Survey Turnover (£m)	2031 Survey Turnover (£m)	2034 Survey Turnover (£m)	2038 Survey Turnover (£m)
Expenditure in the Study Area (£m)		£1,115.2	£1,096.4	£1,081.0	£1,067.2	£1,047.5
Expenditure directed to Portrush	0.4%	£4.5	£4.4	£4.3	£4.3	£4.2

Notes:

a. Market Share percentage figures are derived from Table 4a. This is then applied to the total convenience goods expenditure available (excluding SFT) as taken from Table 1b

Table 6b-d: Convenience goods market share derived turnover, and assumed inflow from outside of the Study Area (£m)

	Estimated 'Inflow' from Outside Study Area (%)	2025 Turnover with Inflow (£m)	2028 Turnover with Inflow (£m)	2031 Turnover with Inflow (£m)	2034 Turnover with Inflow (£m)	2038 Turnover with Inflow (£m)
Expenditure directed to Portrush	10.00%	£4.9	£4.8	£4.8	£4.7	£4.6

Notes:

a. The inflow figures have been estimated by Nexus. This is then applied to the survey turnover as presented in Table 6a.

Table 6c-d: Benchmark Turnovers (£m)

	2025 Benchmark Turnover (£m)	2028 Benchmark Turnover (£m)	2031 Benchmark Turnover (£m)	2034 Benchmark Turnover (£m)	2038 Benchmark Turnover (£m)
Portrush	£4.9	£4.9	£4.9	£4.9	£4.9

Notes:

a. Benchmark turnover figure at 2024 is sourced from Table 5. It is then "grown" to the respective years using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

Causeway Coast & Glens Retail Capacity Assessment

Nexus Planning

2023 Prices

Table 7a-d: Convenience Goods Capacity Assessment

	2025	2028	2031	2034	2038
STEP 1: Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£4.9	£4.8	£4.7	£4.6	£4.6
STEP 2: Total Forecast "Benchmark" Turnover of all Floorspace (£m)	£4.9	£4.9	£4.9	£4.9	£4.9
STEP 3: Available Expenditure before commitments (£m)		-£0.1	-£0.2	-£0.2	-£0.3
STEP 4: Turnover of all committed floorspace (£m)		£0.0	£0.0	£0.0	£0.0
STEP 5: Surplus Expenditure (£m)		-£0.1	-£0.2	-£0.2	-£0.3
STEP 6: MAXIMUM FORECAST CAPACITY FOR NEW CONVENIENCE FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,519	£10,519	£10,519	£10,488	£10,446
(ii) MAXIMUM "Net" Floorspace Capacity (sq m):	0	0	0	0	0
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		0	0	0	0
STEP 7: MINIMUM FORECAST CAPACITY FOR NEW CONVENIENCE FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£13,481	£13,481	£13,481	£13,441	£13,387
(ii) MINIMUM "Net" Floorspace Capacity (sq m):	0	0	0	0	0
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		0	0	0	0

Notes

STEP 1: Survey Derived (with Inflow) turnover is derived from Table 6b.

STEP 2: Benchmark Turnover is derived from Table 6c

STEP 3: Available Expenditure before commitments is derived from Steps 1 and 2.

STEP 4: The turnover of all known commitments has been derived from Table 6d. It is assumed that all commitments would be operational and with mature trading conditions by 2028.

STEP 5: Surplus Expenditure incorporates the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement utilising the average sales density of deep discounter operators (Aldi and Lidl) as sourced from GlobalData 2024. The sales density for respective years is "grown" using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

STEP 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement utilising the average sales density of Top 4 operators (Asda, Tesco, Sainsbury's and Morrisons) as sourced from GlobalData 2024. The sales density for respective years is "grown" using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

Capacity Findings - Portstewart

Table 6a-e: Convenience goods market share derived turnover (based on household survey results, as weighted)

	% Market Share	2025 Survey Turnover (£m)	2028 Survey Turnover (£m)	2031 Survey Turnover (£m)	2034 Survey Turnover (£m)	2038 Survey Turnover (£m)
Expenditure in the Study Area (£m)		£1,115.2	£1,096.4	£1,081.0	£1,067.2	£1,047.5
Expenditure directed to Portstewart	1.4%	£15.7	£15.4	£15.2	£15.0	£14.8

Notes:

a. Market Share percentage figures are derived from Table 4a. This is then applied to the total convenience goods expenditure available (excluding SFT) as taken from Table 1b

Table 6b-e: Convenience goods market share derived turnover, and assumed inflow from outside of the Study Area (£m)

	Estimated 'Inflow' from Outside Study Area (%)	2025 Turnover with Inflow (£m)	2028 Turnover with Inflow (£m)	2031 Turnover with Inflow (£m)	2034 Turnover with Inflow (£m)	2038 Turnover with Inflow (£m)
Expenditure directed to Portstewart	10.00%	£17.3	£17.0	£16.7	£16.5	£16.2

Notes:

a. The inflow figures have been estimated by Nexus. This is then applied to the survey turnover as presented in Table 6a.

Table 6c-e: Benchmark Turnovers (£m)

	2025 Benchmark Turnover (£m)	2028 Benchmark Turnover (£m)	2031 Benchmark Turnover (£m)	2034 Benchmark Turnover (£m)	2038 Benchmark Turnover (£m)
Portstewart	£18.3	£18.3	£18.3	£18.3	£18.2

Notes:

a. Benchmark turnover figure at 2024 is sourced from Table 5. It is then "grown" to the respective years using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

Causeway Coast & Glens Retail Capacity Assessment

Nexus Planning

2023 Prices

Table 7a-e: Convenience Goods Capacity Assessment

	2025	2028	2031	2034	2038
STEP 1: Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£17.3	£17.0	£16.7	£16.5	£16.2
STEP 2: Total Forecast "Benchmark" Turnover of all Floorspace (£m)	£18.3	£18.3	£18.3	£18.3	£18.2
STEP 3: Available Expenditure before commitments (£m)		-£1.3	-£1.6	-£1.7	-£2.0
STEP 4: Turnover of all committed floorspace (£m)		£0.0	£0.0	£0.0	£0.0
STEP 5: Surplus Expenditure (£m)		-£1.3	-£1.6	-£1.7	-£2.0
STEP 6: MAXIMUM FORECAST CAPACITY FOR NEW CONVENIENCE FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,519	£10,519	£10,519	£10,488	£10,446
(ii) MAXIMUM "Net" Floorspace Capacity (sq m):		-100	-200	-200	-200
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-143	-286	-286	-286
STEP 7: MINIMUM FORECAST CAPACITY FOR NEW CONVENIENCE FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£13,481	£13,481	£13,481	£13,441	£13,387
(ii) MINIMUM "Net" Floorspace Capacity (sq m):		-100	-100	-100	-100
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-143	-143	-143	-143

Notes

STEP 1: Survey Derived (with Inflow) turnover is derived from Table 6b.

STEP 2: Benchmark Turnover is derived from Table 6c

STEP 3: Available Expenditure before commitments is derived from Steps 1 and 2.

STEP 4: The turnover of all known commitments has been derived from Table 6d. It is assumed that all commitments would be operational and with mature trading conditions by 2028.

STEP 5: Surplus Expenditure incorporates the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement utilising the average sales density of deep discounter operators (Aldi and Lidl) as sourced from GlobalData 2024. The sales density for respective years is "grown" using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

STEP 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement utilising the average sales density of Top 4 operators (Asda, Tesco, Sainsbury's and Morrisons) as sourced from GlobalData 2024. The sales density for respective years is "grown" using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

Capacity Findings - Ballycastle

Table 6a-f: Convenience goods market share derived turnover (based on household survey results, as weighted)

	% Market Share	2025 Survey Turnover (£m)	2028 Survey Turnover (£m)	2031 Survey Turnover (£m)	2034 Survey Turnover (£m)	2038 Survey Turnover (£m)
Expenditure in the Study Area (£m)		£1,115.2	£1,096.4	£1,081.0	£1,067.2	£1,047.5
Expenditure directed to Ballycastle	1.1%	£12.3	£12.1	£11.9	£11.8	£11.6

Notes:

a. Market Share percentage figures are derived from Table 4a. This is then applied to the total convenience goods expenditure available (excluding SFT) as taken from Table 1b

Table 6b-f: Convenience goods market share derived turnover, and assumed inflow from outside of the Study Area (£m)

	Estimated 'Inflow' from Outside Study Area (%)	2025 Turnover with Inflow (£m)	2028 Turnover with Inflow (£m)	2031 Turnover with Inflow (£m)	2034 Turnover with Inflow (£m)	2038 Turnover with Inflow (£m)
Expenditure directed to Ballycastle	10.00%	£13.5	£13.3	£13.1	£13.0	£12.7

Notes:

a. The inflow figures have been estimated by Nexus. This is then applied to the survey turnover as presented in Table 6a.

Table 6c-f: Benchmark Turnovers (£m)

	2025 Benchmark Turnover (£m)	2028 Benchmark Turnover (£m)	2031 Benchmark Turnover (£m)	2034 Benchmark Turnover (£m)	2038 Benchmark Turnover (£m)
Ballycastle	£13.5	£13.5	£13.5	£13.5	£13.4

Notes:

a. Benchmark turnover figure at 2024 is sourced from Table 5. It is then "grown" to the respective years using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

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Table 7a-f: Convenience Goods Capacity Assessment

	2025	2028	2031	2034	2038
STEP 1: Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£13.5	£13.3	£13.1	£13.0	£12.7
STEP 2: Total Forecast "Benchmark" Turnover of all Floorspace (£m)	£13.5	£13.5	£13.5	£13.5	£13.4
STEP 3: Available Expenditure before commitments (£m)		-£0.2	-£0.4	-£0.5	-£0.7
STEP 4: Turnover of all committed floorspace (£m)		£0.0	£0.0	£0.0	£0.0
STEP 5: Surplus Expenditure (£m)		-£0.2	-£0.4	-£0.5	-£0.7
STEP 6: MAXIMUM FORECAST CAPACITY FOR NEW CONVENIENCE FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,519	£10,519	£10,519	£10,488	£10,446
(ii) MAXIMUM "Net" Floorspace Capacity (sq m):	0	0	0	-100	-100
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		0	0	-143	-143
STEP 7: MINIMUM FORECAST CAPACITY FOR NEW CONVENIENCE FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£13,481	£13,481	£13,481	£13,441	£13,387
(ii) MINIMUM "Net" Floorspace Capacity (sq m):	0	0	0	0	-100
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		0	0	0	-143

Notes

STEP 1: Survey Derived (with Inflow) turnover is derived from Table 6b.

STEP 2: Benchmark Turnover is derived from Table 6c

STEP 3: Available Expenditure before commitments is derived from Steps 1 and 2.

STEP 4: The turnover of all known commitments has been derived from Table 6d. It is assumed that all commitments would be operational and with mature trading conditions by 2028.

STEP 5: Surplus Expenditure incorporates the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement utilising the average sales density of deep discounter operators (Aldi and Lidl) as sourced from GlobalData 2024. The sales density for respective years is "grown" using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

STEP 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement utilising the average sales density of Top 4 operators (Asda, Tesco, Sainsbury's and Morrisons) as sourced from GlobalData 2024. The sales density for respective years is "grown" using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

Capacity Findings - Ballymoney

Table 6a-g: Convenience goods market share derived turnover (based on household survey results, as weighted)

	% Market Share	2025 Survey Turnover (£m)	2028 Survey Turnover (£m)	2031 Survey Turnover (£m)	2034 Survey Turnover (£m)	2038 Survey Turnover (£m)
Expenditure in the Study Area (£m)		£1,115.2	£1,096.4	£1,081.0	£1,067.2	£1,047.5
Expenditure directed to Ballymoney	8.8%	£98.7	£97.0	£95.7	£94.4	£92.7

Notes:

a. Market Share percentage figures are derived from Table 4a. This is then applied to the total convenience goods expenditure available (excluding SFT) as taken from Table 1b

Table 6b-g: Convenience goods market share derived turnover, and assumed inflow from outside of the Study Area (£m)

	Estimated 'Inflow' from Outside Study Area (%)	2025 Turnover with Inflow (£m)	2028 Turnover with Inflow (£m)	2031 Turnover with Inflow (£m)	2034 Turnover with Inflow (£m)	2038 Turnover with Inflow (£m)
Expenditure directed to Ballymoney	0.00%	£98.7	£97.0	£95.7	£94.4	£92.7

Notes:

a. The inflow figures have been estimated by Nexus. This is then applied to the survey turnover as presented in Table 6a.

Table 6c-g: Benchmark Turnovers (£m)

	2025 Benchmark Turnover (£m)	2028 Benchmark Turnover (£m)	2031 Benchmark Turnover (£m)	2034 Benchmark Turnover (£m)	2038 Benchmark Turnover (£m)
Ballymoney	£79.4	£79.4	£79.4	£79.2	£78.9

Notes:

a. Benchmark turnover figure at 2024 is sourced from Table 5. It is then "grown" to the respective years using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

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Table 7a-g: Convenience Goods Capacity Assessment

	2025	2028	2031	2034	2038
STEP 1: Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£98.7	£97.0	£95.7	£94.4	£92.7
STEP 2: Total Forecast "Benchmark" Turnover of all Floorspace (£m)	£79.4	£79.4	£79.4	£79.2	£78.9
STEP 3: Available Expenditure before commitments (£m)		£17.6	£16.2	£15.2	£13.8
STEP 4: Turnover of all committed floorspace (£m)		£0.0	£0.0	£0.0	£0.0
STEP 5: Surplus Expenditure (£m)		£17.6	£16.2	£15.2	£13.8
STEP 6: MAXIMUM FORECAST CAPACITY FOR NEW CONVENIENCE FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,519	£10,519	£10,519	£10,488	£10,446
(ii) MAXIMUM "Net" Floorspace Capacity (sq m):	1,700	1,500	1,500	1,500	1,300
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	2429	2143	2143	2143	1,857
STEP 7: MINIMUM FORECAST CAPACITY FOR NEW CONVENIENCE FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£13,481	£13,481	£13,481	£13,441	£13,387
(ii) MINIMUM "Net" Floorspace Capacity (sq m):	1,300	1,200	1,200	1,100	1,000
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	1,857	1,714	1,714	1,571	1,429

Notes

STEP 1: Survey Derived (with Inflow) turnover is derived from Table 6b.

STEP 2: Benchmark Turnover is derived from Table 6c

STEP 3: Available Expenditure before commitments is derived from Steps 1 and 2.

STEP 4: The turnover of all known commitments has been derived from Table 6d. It is assumed that all commitments would be operational and with mature trading conditions by 2028.

STEP 5: Surplus Expenditure incorporates the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement utilising the average sales density of deep discounter operators (Aldi and Lidl) as sourced from GlobalData 2024. The sales density for respective years is "grown" using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

STEP 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement utilising the average sales density of Top 4 operators (Asda, Tesco, Sainsbury's and Morrisons) as sourced from GlobalData 2024. The sales density for respective years is "grown" using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

Capacity Findings - Rest of Causeway Coast & Glens

Table 6a-h: Convenience goods market share derived turnover (based on household survey results, as weighted)

	% Market Share	2025 Survey Turnover (£m)	2028 Survey Turnover (£m)	2031 Survey Turnover (£m)	2034 Survey Turnover (£m)	2038 Survey Turnover (£m)
Expenditure in the Study Area (£m)		£1,115.2	£1,096.4	£1,081.0	£1,067.2	£1,047.5
Expenditure directed to Rest of CCG	8.7%	£96.8	£95.2	£93.9	£92.7	£91.0

Notes:

a. Market Share percentage figures are derived from Table 4a. This is then applied to the total convenience goods expenditure available (excluding SFT) as taken from Table 1b

Table 6b-h: Convenience goods market share derived turnover, and assumed inflow from outside of the Study Area (£m)

	Estimated 'Inflow' from Outside Study Area (%)	2025 Turnover with Inflow (£m)	2028 Turnover with Inflow (£m)	2031 Turnover with Inflow (£m)	2034 Turnover with Inflow (£m)	2038 Turnover with Inflow (£m)
Expenditure directed to Rest of CCG	0.00%	£96.8	£95.2	£93.9	£92.7	£91.0

Notes:

a. The inflow figures have been estimated by Nexus. This is then applied to the survey turnover as presented in Table 6a.

Table 6c-h: Benchmark Turnovers (£m)

	2025 Benchmark Turnover (£m)	2028 Benchmark Turnover (£m)	2031 Benchmark Turnover (£m)	2034 Benchmark Turnover (£m)	2038 Benchmark Turnover (£m)
Rest of CCG	£96.8	£96.8	£96.8	£96.5	£96.2

Notes:

a. Benchmark turnover figure at 2024 is sourced from Table 5. It is then "grown" to the respective years using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

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Table 7a-h: Convenience Goods Capacity Assessment

	2025	2028	2031	2034	2038
STEP 1: Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£96.8	£95.2	£93.9	£92.7	£91.0
STEP 2: Total Forecast "Benchmark" Turnover of all Floorspace (£m)	£96.8	£96.8	£96.8	£96.5	£96.2
STEP 3: Available Expenditure before commitments (£m)		-£1.6	-£3.0	-£3.9	-£5.2
STEP 4: Turnover of all committed floorspace (£m)		£0.0	£0.0	£0.0	£0.0
STEP 5: Surplus Expenditure (£m)		-£1.6	-£3.0	-£3.9	-£5.2
STEP 6: MAXIMUM FORECAST CAPACITY FOR NEW CONVENIENCE FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,519	£10,519	£10,519	£10,488	£10,446
(ii) MAXIMUM "Net" Floorspace Capacity (sq m):	-200	-300	-400	-500	
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	-286	-429	-571	-714	
STEP 7: MINIMUM FORECAST CAPACITY FOR NEW CONVENIENCE FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£13,481	£13,481	£13,481	£13,441	£13,387
(ii) MINIMUM "Net" Floorspace Capacity (sq m):	-100	-200	-300	-400	
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	-143	-286	-429	-571	

Notes:

STEP 1: Survey Derived (with Inflow) turnover is derived from Table 6b.

STEP 2: Benchmark Turnover is derived from Table 6c.

STEP 3: Available Expenditure before commitments is derived from Steps 1 and 2.

STEP 4: The turnover of all known commitments has been derived from Table 6d. It is assumed that all commitments would be operational and with mature trading conditions by 2028.

STEP 5: Surplus Expenditure incorporates the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement utilising the average sales density of deep discounter operators (Aldi and Lidl) as sourced from GlobalData 2024. The sales density for respective years is "grown" using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

STEP 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement utilising the average sales density of Top 4 operators (Asda, Tesco, Sainsbury's and Morrisons) as sourced from GlobalData 2024. The sales density for respective years is "grown" using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

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Table 8a: Population and comparison goods expenditure per capita (excluding SFT)

Zone	Population					Population Growth	Comparison expenditure per capita (excluding SFT)				
	2025	2028	2031	2034	2038		2025	2028	2031	2034	2038
Zone 1	35,677	35,616	35,480	35,266	34,911	-2.1%	£3,197	£3,334	£3,550	£3,762	£4,036
Zone 2	65,066	64,955	64,708	64,318	63,669	-2.1%	£3,515	£3,666	£3,903	£4,137	£4,438
Zone 3	42,301	42,229	42,068	41,814	41,393	-2.1%	£3,219	£3,357	£3,574	£3,788	£4,064
Zone 4	16,007	15,979	15,919	15,822	15,663	-2.1%	£3,227	£3,365	£3,582	£3,797	£4,074
Zone 5	43,310	43,407	43,405	43,346	43,213	-0.2%	£3,331	£3,474	£3,699	£3,920	£4,206
Zone 6	44,663	45,388	46,025	46,612	47,371	6.1%	£3,029	£3,159	£3,364	£3,565	£3,825
Zone 7	115,406	114,894	114,145	113,233	111,879	-3.1%	£3,157	£3,293	£3,506	£3,715	£3,986
<b>Total Study Area</b>	<b>362,429</b>	<b>362,468</b>	<b>361,751</b>	<b>360,412</b>	<b>358,098</b>	<b>-1.2%</b>					

Notes

a. Zones are based on postal sectors as shown on the plan at Appendix A

b. Population data is sourced from Experian App Library (Data Version UK24) and NISRA 2018-based population projections

c. Per capita expenditure figures are derived from Experian App Library data (2024 report) at 2023 - the 2023 figures are then projected to the assessment years using "Ex. SFT adjusted for sales via stores' forecast growth rates taken from Figure 7 of Experian Retail Planner Briefing Note 22.

Table 8b: Total comparison goods expenditure available (excluding SFT)

Zones	Comparison expenditure (£m)					Growth (£m)
	2025	2028	2031	2034	2038	
Zone 1	£114.1	£118.7	£125.9	£132.7	£140.9	23.5%
Zone 2	£228.7	£238.1	£252.6	£266.1	£282.6	23.5%
Zone 3	£136.2	£141.8	£150.4	£158.4	£168.2	23.5%
Zone 4	£51.6	£53.8	£57.0	£60.1	£63.8	23.5%
Zone 5	£144.3	£150.8	£160.6	£169.9	£181.8	26.0%
Zone 6	£135.3	£143.4	£154.8	£166.2	£181.2	33.9%
Zone 7	£364.4	£378.3	£400.1	£420.7	£446.0	22.4%
<b>Total Study Area</b>	<b>£1,174.6</b>	<b>£1,225.0</b>	<b>£1,301.4</b>	<b>£1,374.0</b>	<b>£1,464.4</b>	<b>24.7%</b>

Notes:

a. Figures derived from multiplying per capita expenditure with population within each zone using data provided at Table 8a

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Table 8c: Comparison goods expenditure per capita (excluding SFT) - For each zone, split between comparison goods categories

Year	Clothing & Footwear	Furniture	DIY	Electrical	Small Household	Small Media	Chemist	Recreational	Total
2025	£372.1	£106.6	£84.7	£123.2	£251.4	£50.7	£59.1	£126.8	£1,174.6
2028	£388.0	£111.1	£88.4	£128.5	£262.2	£52.9	£61.6	£132.2	£1,225.0
2031	£412.1	£118.1	£93.9	£136.5	£278.6	£56.2	£65.5	£140.5	£1,301.4
2034	£435.1	£124.6	£99.2	£144.1	£294.2	£59.4	£69.1	£148.3	£1,374.0
2038	£463.6	£132.8	£105.8	£153.6	£313.6	£63.3	£73.6	£158.1	£1,464.4

Table 8d: Total comparison goods expenditure available (excluding SFT) (£m)

2025	Clothing & Footwear	Furniture	DIY	Electrical	Small Household	Small Media	Chemist	Recreational	Total
Zone 1	£35.4	£9.8	£8.9	£12.3	£25.0	£5.5	£5.1	£12.1	£114.1
Zone 2	£71.2	£21.7	£16.7	£23.9	£48.1	£9.5	£12.3	£25.3	£228.7
Zone 3	£41.9	£11.8	£11.1	£14.4	£30.2	£6.5	£6.1	£14.4	£136.2
Zone 4	£15.7	£4.2	£4.3	£5.8	£11.0	£2.5	£2.7	£5.6	£51.6
Zone 5	£45.7	£13.9	£10.0	£14.7	£30.7	£5.9	£7.6	£15.8	£144.3
Zone 6	£41.2	£11.7	£11.2	£14.2	£30.1	£6.4	£6.1	£14.4	£135.3
Zone 7	£121.0	£33.5	£22.5	£38.0	£76.4	£14.5	£19.2	£39.3	£364.4
<b>Total Study Area</b>	<b>£372.1</b>	<b>£106.6</b>	<b>£84.7</b>	<b>£123.2</b>	<b>£251.4</b>	<b>£50.7</b>	<b>£59.1</b>	<b>£126.8</b>	<b>£1,174.6</b>

2028	Clothing & Footwear	Furniture	DIY	Electrical	Small Household	Small Media	Chemist	Recreational	Total
Zone 1	£36.8	£10.2	£9.3	£12.8	£26.1	£5.7	£5.3	£12.6	£118.7
Zone 2	£74.1	£22.6	£17.4	£24.9	£50.1	£9.9	£12.8	£26.4	£238.1
Zone 3	£43.6	£12.2	£11.5	£15.0	£31.4	£6.7	£6.3	£15.0	£141.8
Zone 4	£16.3	£4.4	£4.5	£6.0	£11.4	£2.6	£2.8	£5.8	£53.8
Zone 5	£47.8	£14.5	£10.5	£15.4	£32.0	£6.1	£8.0	£16.5	£150.8
Zone 6	£43.7	£12.4	£11.8	£15.0	£31.9	£6.8	£6.5	£15.2	£143.4
Zone 7	£125.6	£34.8	£23.3	£39.4	£79.3	£15.1	£19.9	£40.8	£378.3
<b>Total Study Area</b>	<b>£388.0</b>	<b>£111.1</b>	<b>£88.4</b>	<b>£128.5</b>	<b>£262.2</b>	<b>£52.9</b>	<b>£61.6</b>	<b>£132.2</b>	<b>£1,225.0</b>

2031	Clothing & Footwear	Furniture	DIY	Electrical	Small Household	Small Media	Chemist	Recreational	Total
Zone 1	£39.1	£10.8	£9.9	£13.6	£27.6	£6.1	£5.6	£13.3	£125.9
Zone 2	£78.6	£23.9	£18.4	£26.4	£53.1	£10.5	£13.6	£28.0	£252.6
Zone 3	£46.3	£13.0	£12.2	£15.9	£33.3	£7.1	£6.7	£15.9	£150.4
Zone 4	£17.3	£4.7	£4.7	£6.4	£12.1	£2.7	£3.0	£6.1	£57.0
Zone 5	£50.9	£15.5	£11.2	£16.4	£34.1	£6.5	£8.5	£17.6	£160.6
Zone 6	£47.2	£13.4	£12.8	£16.2	£34.4	£7.4	£7.0	£16.4	£154.8
Zone 7	£132.9	£36.8	£24.7	£41.7	£83.8	£16.0	£21.1	£43.2	£400.1
<b>Total Study Area</b>	<b>£412.1</b>	<b>£118.1</b>	<b>£93.9</b>	<b>£136.5</b>	<b>£278.6</b>	<b>£56.2</b>	<b>£65.5</b>	<b>£140.5</b>	<b>£1,301.4</b>

2034	Clothing & Footwear	Furniture	DIY	Electrical	Small Household	Small Media	Chemist	Recreational	Total
Zone 1	£41.1	£11.4	£10.4	£14.3	£29.1	£6.4	£5.9	£14.1	£132.7
Zone 2	£82.8	£25.2	£19.4	£27.8	£56.0	£11.0	£14.3	£29.5	£266.1
Zone 3	£48.7	£13.7	£12.9	£16.7	£35.1	£7.5	£7.0	£16.7	£158.4
Zone 4	£18.2	£4.9	£5.0	£6.7	£12.8	£2.9	£3.2	£6.5	£60.1
Zone 5	£53.8	£16.4	£11.8	£17.3	£36.1	£6.9	£9.0	£18.6	£169.9
Zone 6	£50.6	£14.4	£13.7	£17.4	£37.0	£7.9	£7.5	£17.6	£166.2
Zone 7	£139.7	£38.7	£26.0	£43.8	£88.2	£16.8	£22.2	£45.4	£420.7
<b>Total Study Area</b>	<b>£435.1</b>	<b>£124.6</b>	<b>£99.2</b>	<b>£144.1</b>	<b>£294.2</b>	<b>£59.4</b>	<b>£69.1</b>	<b>£148.3</b>	<b>£1,374.0</b>

2038	Clothing & Footwear	Furniture	DIY	Electrical	Small Household	Small Media	Chemist	Recreational	Total
Zone 1	£43.7	£12.1	£11.0	£15.2	£30.9	£6.8	£6.3	£14.9	£140.9
Zone 2	£88.0	£26.8	£20.6	£29.5	£59.5	£11.7	£15.2	£31.3	£282.6
Zone 3	£51.8	£14.5	£13.7	£17.8	£37.3	£8.0	£7.5	£17.8	£168.2
Zone 4	£19.3	£5.2	£5.3	£7.1	£13.5	£3.0	£3.4	£6.9	£63.8
Zone 5	£57.6	£17.5	£12.7	£18.5	£38.6	£7.4	£9.6	£19.9	£181.8
Zone 6	£55.2	£15.7	£14.9	£19.0	£40.3	£8.6	£8.2	£19.2	£181.2
Zone 7	£148.1	£41.0	£27.5	£46.5	£93.4	£17.8	£23.5	£48.1	£446.0
<b>Total Study Area</b>	<b>£463.6</b>	<b>£132.8</b>	<b>£105.8</b>	<b>£153.6</b>	<b>£313.6</b>	<b>£63.3</b>	<b>£73.6</b>	<b>£158.1</b>	<b>£1,464.4</b>

**Table 9a:**  
Clothing & footwear goods  
Shopping Patterns (%)

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Zones 1-4	29.3%	60.9%	54.5%	77.1%	55.1%	16.8%	1.3%	9.8%	6.1%
Zone 1 - Limavady	5.0%	7.1%	31.6%	0.8%	0.0%	0.0%	0.0%	0.0%	3.6%
Limavady	5.0%	7.1%	31.6%	0.8%	0.0%	0.0%	0.0%	0.0%	3.6%
Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 - Coleraine	18.9%	41.8%	20.6%	69.3%	26.3%	6.3%	0.7%	7.6%	2.5%
Coleraine	17.5%	39.5%	19.1%	64.6%	26.3%	6.3%	0.7%	3.9%	2.5%
Portrush	0.3%	0.8%	0.8%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Portstewart	0.6%	1.2%	0.8%	2.3%	0.0%	0.0%	0.0%	0.7%	0.0%
Zone 2 - Other	0.5%	0.3%	0.0%	0.8%	0.0%	0.0%	0.0%	2.9%	0.0%
Zone 3 - Ballymoney	5.0%	11.0%	2.3%	7.1%	28.1%	2.6%	0.7%	2.2%	0.0%
Ballymoney	5.0%	11.0%	2.3%	7.1%	28.1%	2.6%	0.7%	2.2%	0.0%
Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 4 - The Glens	0.3%	1.0%	0.0%	0.0%	0.8%	7.9%	0.0%	0.0%	0.0%
Ballycastle	0.3%	0.9%	0.0%	0.0%	0.8%	7.0%	0.0%	0.0%	0.0%
Zone 4 - Other	0.0%	0.1%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%
Zones 5-7	51.2%	22.3%	29.4%	10.3%	28.8%	43.0%	59.3%	50.3%	85.2%
Zone 5 - Ballymena	13.3%	12.1%	0.8%	4.8%	22.7%	42.2%	56.2%	15.0%	0.0%
Zone 6 - Maghera	4.8%	0.5%	0.8%	0.8%	0.0%	0.0%	0.0%	34.5%	1.2%
Zone 7 - Londonderry	33.1%	9.7%	27.9%	4.7%	6.1%	0.9%	3.1%	0.7%	84.0%
Outside Study Area	19.5%	16.8%	16.0%	12.5%	16.1%	40.2%	39.4%	39.9%	8.7%
Antrim	3.7%	2.9%	4.3%	3.4%	0.8%	3.4%	7.1%	3.9%	3.4%
Belfast	5.0%	8.5%	11.0%	9.1%	7.2%	3.4%	5.8%	4.6%	0.0%
Cookstown	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	12.6%	0.0%
Larne	0.5%	1.6%	0.0%	0.0%	0.0%	16.5%	0.0%	0.0%	0.0%
Omagh	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.7%	0.0%
Strabane	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.2%
Outside Study Area - Other	6.3%	3.9%	0.8%	0.0%	8.1%	16.9%	26.5%	13.0%	0.0%
<b>Total</b>	<b>100.0%</b>								

Notes:

a. Figures may not add up due to rounding.

**Table 9b:**  
Clothing & footwear goods  
Shopping Expenditure (£m at 2025)

2023 Prices

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Zones 1-4	£112.0	£99.9	£19.3	£54.9	£23.1	£2.6	£0.6	£4.0	£7.4
Zone 1 - Limavady	£16.1	£11.7	£11.2	£0.6	£0.0	£0.0	£0.0	£0.0	£4.4
Limavady	£16.1	£11.7	£11.2	£0.6	£0.0	£0.0	£0.0	£0.0	£4.4
Zone 1 - Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 2 - Coleraine	£75.0	£68.6	£7.3	£49.3	£11.0	£1.0	£0.3	£3.1	£3.0
Coleraine	£69.7	£64.8	£6.7	£46.0	£11.0	£1.0	£0.3	£1.6	£3.0
Portrush	£1.4	£1.4	£0.3	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0
Portstewart	£2.2	£1.9	£0.3	£1.7	£0.0	£0.0	£0.0	£0.3	£0.0
Zone 2 - Other	£1.8	£0.6	£0.0	£0.6	£0.0	£0.0	£0.0	£1.2	£0.0
Zone 3 - Ballymoney	£19.2	£18.0	£0.8	£5.0	£11.8	£0.4	£0.3	£0.9	£0.0
Ballymoney	£19.2	£18.0	£0.8	£5.0	£11.8	£0.4	£0.3	£0.9	£0.0
Zone 3 - Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 4 - The Glens	£1.6	£1.6	£0.0	£0.0	£0.3	£1.2	£0.0	£0.0	£0.0
Ballycastle	£1.4	£1.4	£0.0	£0.0	£0.3	£1.1	£0.0	£0.0	£0.0
Zone 4 - Other	£0.1	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0
Zones 5-7	£187.5	£36.6	£10.4	£7.4	£12.0	£6.7	£27.1	£20.7	£103.1
Zone 5 - Ballymena	£51.7	£19.8	£0.3	£3.4	£9.5	£6.6	£25.7	£6.2	£0.0
Zone 6 - Maghera	£16.6	£0.8	£0.3	£0.6	£0.0	£0.0	£0.0	£14.2	£1.5
Zone 7 - Londonderry	£119.3	£15.9	£9.9	£3.4	£2.6	£0.1	£1.4	£0.3	£101.6
Outside Study Area	£72.6	£27.6	£5.7	£8.9	£6.8	£6.3	£18.0	£16.5	£10.5
Antrim	£13.9	£4.8	£1.5	£2.4	£0.3	£0.5	£3.3	£1.6	£4.2
Belfast	£18.4	£13.9	£3.9	£6.5	£3.0	£0.5	£2.6	£1.9	£0.0
Cookstown	£5.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£5.2	£0.0
Larne	£2.6	£2.6	£0.0	£0.0	£0.0	£2.6	£0.0	£0.0	£0.0
Omagh	£2.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.3	£0.0
Strabane	£6.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£6.3
Outside Study Area - Other	£23.8	£6.3	£0.3	£0.0	£3.4	£2.6	£12.1	£5.4	£0.0
<b>Total</b>	<b>£372.1</b>	<b>£164.1</b>	<b>£35.4</b>	<b>£71.2</b>	<b>£41.9</b>	<b>£15.7</b>	<b>£45.7</b>	<b>£41.2</b>	<b>£121.0</b>

Notes:

a. Figures may not add up due to rounding.

**Table 10a:**  
Small media (books, CDs, DVDs)  
Shopping Patterns (%)

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Zones 1-4	33.7%	64.5%	33.7%	65.5%	88.9%	64.7%	20.7%	1.4%	21.4%
Zone 1 - Limavady	6.2%	21.7%	6.2%	51.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Limavady	5.6%	19.2%	5.6%	45.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 1 - Other	0.6%	2.4%	0.6%	5.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 - Coleraine	21.9%	36.6%	21.9%	14.4%	84.4%	29.0%	4.7%	1.4%	16.4%
Coleraine	20.6%	35.3%	20.6%	14.4%	81.3%	27.3%	4.7%	1.4%	11.5%
Portrush	0.3%	0.5%	0.3%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%
Portstewart	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 - Other	1.0%	0.8%	1.0%	0.0%	1.6%	1.7%	0.0%	0.0%	4.9%
Zone 3 - Ballymoney	5.3%	6.1%	5.3%	0.0%	4.5%	35.7%	0.0%	0.0%	5.1%
Ballymoney	4.7%	5.8%	4.7%	0.0%	4.5%	34.0%	0.0%	0.0%	1.7%
Zone 3 - Other	0.6%	0.3%	0.6%	0.0%	0.0%	1.7%	0.0%	0.0%	3.4%
Zone 4 - The Glens	0.4%	0.1%	0.4%	0.0%	0.0%	0.0%	16.1%	0.0%	0.0%
Ballycastle	0.4%	0.1%	0.4%	0.0%	0.0%	0.0%	16.1%	0.0%	0.0%
Zone 4 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zones 5-7	52.0%	28.9%	52.0%	34.5%	1.6%	28.1%	43.3%	53.3%	48.5%
Zone 5 - Ballymena	11.8%	6.0%	11.8%	0.0%	1.6%	28.1%	43.3%	51.9%	10.2%
Zone 6 - Maghera	4.3%	1.0%	4.3%	0.0%	0.0%	0.0%	0.0%	0.0%	38.3%
Zone 7 - Londonderry	35.9%	21.9%	35.9%	34.5%	0.0%	0.0%	0.0%	1.4%	0.0%
Outside Study Area	14.3%	6.6%	14.3%	0.0%	9.5%	7.2%	35.9%	45.3%	30.1%
Antrim	0.5%	0.1%	0.5%	0.0%	0.0%	0.0%	4.0%	0.0%	0.0%
Belfast	3.0%	2.8%	3.0%	0.0%	5.0%	7.2%	0.0%	6.2%	5.1%
Cookstown	1.5%	0.3%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	13.4%
Larne	1.2%	0.3%	1.2%	0.0%	0.0%	0.0%	18.1%	6.2%	0.0%
Omagh	0.4%	0.1%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	3.4%
Strabane	1.7%	0.4%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside Study Area - Other	6.1%	2.6%	6.1%	0.0%	4.5%	0.0%	17.8%	28.9%	8.3%
<b>Total</b>	<b>100.0%</b>								

Notes:

a. Figures may not add up due to rounding.

**Table 10b:**  
Small media (books, CDs, DVDs)  
Shopping Expenditure (£m at 2025)

2023 Prices

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Zones 1-4	£19.8	£15.4	£1.9	£6.2	£5.8	£1.6	£1.2	£0.1	£3.1
Zone 1 - Limavady	£5.2	£5.2	£0.3	£4.8	£0.0	£0.0	£0.0	£0.0	£0.0
Limavady	£4.6	£4.6	£0.3	£4.3	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 1 - Other	£0.6	£0.6	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 2 - Coleraine	£11.5	£8.7	£1.2	£1.4	£5.5	£0.7	£0.3	£0.1	£2.4
Coleraine	£10.5	£8.4	£1.1	£1.4	£5.3	£0.7	£0.3	£0.1	£1.7
Portrush	£0.1	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
Portstewart	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 2 - Other	£0.9	£0.2	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.7
Zone 3 - Ballymoney	£2.2	£1.5	£0.3	£0.0	£0.3	£0.9	£0.0	£0.0	£0.7
Ballymoney	£1.6	£1.4	£0.3	£0.0	£0.3	£0.8	£0.0	£0.0	£0.2
Zone 3 - Other	£0.6	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
Zone 4 - The Glens	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.0	£0.0
Ballycastle	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.0	£0.0
Zone 4 - Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zones 5-7	£19.9	£6.9	£2.9	£3.3	£0.1	£0.7	£2.5	£3.4	£7.1
Zone 5 - Ballymena	£8.8	£1.4	£0.6	£0.0	£0.1	£0.7	£2.5	£3.3	£1.5
Zone 6 - Maghera	£5.8	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£5.6
Zone 7 - Londonderry	£5.3	£5.2	£2.0	£3.3	£0.0	£0.0	£0.0	£0.1	£0.0
Outside Study Area	£11.0	£1.6	£0.8	£0.0	£0.6	£0.2	£2.1	£2.9	£4.4
Antrim	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0
Belfast	£1.8	£0.7	£0.2	£0.0	£0.3	£0.2	£0.0	£0.4	£0.7
Cookstown	£2.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£1.9
Larne	£1.5	£0.1	£0.1	£0.0	£0.0	£0.0	£1.1	£0.4	£0.0
Omagh	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
Strabane	£0.1	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Outside Study Area - Other	£4.7	£0.6	£0.3	£0.0	£0.3	£0.0	£1.0	£1.9	£1.2
<b>Total</b>	<b>£50.7</b>	<b>£23.9</b>	<b>£5.5</b>	<b>£9.5</b>	<b>£6.5</b>	<b>£2.5</b>	<b>£5.9</b>	<b>£6.4</b>	<b>£14.5</b>

Notes:

a. Figures may not add up due to rounding.

**Table 11a:**  
**Small household goods**  
**Shopping Patterns (%)**

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Zones 1-4	36.1%	72.0%	64.3%	90.3%	64.7%	29.1%	3.4%	16.6%	9.1%
Zone 1 - Limavady	6.9%	9.5%	43.4%	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%
Limavady	6.9%	9.5%	43.4%	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%
Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 - Coleraine	24.6%	51.9%	20.9%	83.4%	40.6%	15.2%	0.0%	15.8%	4.9%
Coleraine	22.1%	46.3%	20.9%	73.7%	35.0%	15.2%	0.0%	14.9%	4.0%
Portrush	1.1%	2.6%	0.0%	5.6%	1.1%	0.0%	0.0%	0.8%	0.0%
Portstewart	1.4%	2.9%	0.0%	4.1%	4.4%	0.0%	0.0%	0.0%	0.9%
Zone 2 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 3 - Ballymoney	4.2%	9.3%	0.0%	7.0%	24.2%	0.0%	3.4%	0.8%	0.0%
Ballymoney	3.8%	9.3%	0.0%	7.0%	24.2%	0.0%	0.8%	0.8%	0.0%
Zone 3 - Other	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%
Zone 4 - The Glens	0.4%	1.3%	0.0%	0.0%	0.0%	13.8%	0.0%	0.0%	0.0%
Ballycastle	0.4%	1.2%	0.0%	0.0%	0.0%	12.6%	0.0%	0.0%	0.0%
Zone 4 - Other	0.0%	0.1%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%
Zones 5-7	41.7%	15.1%	19.8%	4.3%	25.7%	22.4%	30.0%	54.0%	77.5%
Zone 5 - Ballymena	7.0%	7.0%	0.0%	0.0%	18.4%	22.4%	29.2%	5.0%	0.0%
Zone 6 - Maghera	8.2%	3.7%	0.0%	4.3%	7.3%	0.0%	0.8%	47.3%	0.0%
Zone 7 - Londonderry	26.5%	4.3%	19.8%	0.0%	0.0%	0.0%	0.0%	1.7%	77.5%
Outside Study Area	22.2%	12.9%	15.9%	5.3%	9.6%	48.5%	66.6%	29.4%	13.4%
Antrim	3.0%	0.9%	4.1%	0.0%	0.0%	0.0%	5.9%	3.7%	4.0%
Belfast	3.9%	4.2%	7.8%	4.3%	1.1%	3.6%	6.3%	7.9%	0.0%
Cookstown	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.9%	0.0%
Larne	0.7%	1.1%	0.0%	0.0%	0.0%	11.8%	2.3%	0.0%	0.0%
Omagh	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%
Strabane	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.1%
Outside Study Area - Other	11.7%	6.7%	4.0%	1.0%	8.5%	33.1%	52.1%	8.3%	4.3%
<b>Total</b>	<b>100.0%</b>								

Notes:

a. Figures may not add up due to rounding.

**Table 11b:**  
**Small household goods**  
**Shopping Expenditure (£m at 2025)**

2023 Prices

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Zones 1-4	£95.3	£82.3	£16.1	£43.5	£19.5	£3.2	£1.0	£5.0	£7.0
Zone 1 - Limavady	£14.1	£10.9	£10.9	£0.0	£0.0	£0.0	£0.0	£0.0	£3.3
Limavady	£14.1	£10.9	£10.9	£0.0	£0.0	£0.0	£0.0	£0.0	£3.3
Zone 1 - Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 2 - Coleraine	£67.7	£59.3	£5.2	£40.1	£12.2	£1.7	£0.0	£4.7	£3.7
Coleraine	£60.5	£52.9	£5.2	£35.5	£10.6	£1.7	£0.0	£4.5	£3.1
Portrush	£3.3	£3.0	£0.0	£2.7	£0.3	£0.0	£0.0	£0.3	£0.0
Portstewart	£4.0	£3.3	£0.0	£2.0	£1.3	£0.0	£0.0	£0.0	£0.7
Zone 2 - Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 3 - Ballymoney	£11.9	£10.6	£0.0	£3.3	£7.3	£0.0	£1.0	£0.3	£0.0
Ballymoney	£11.1	£10.6	£0.0	£3.3	£7.3	£0.0	£0.2	£0.3	£0.0
Zone 3 - Other	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0
Zone 4 - The Glens	£1.5	£1.5	£0.0	£0.0	£0.0	£1.5	£0.0	£0.0	£0.0
Ballycastle	£1.4	£1.4	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£0.0
Zone 4 - Other	£0.1	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0
Zones 5-7	£101.8	£17.2	£5.0	£2.1	£7.7	£2.5	£9.2	£16.2	£59.2
Zone 5 - Ballymena	£18.5	£8.0	£0.0	£0.0	£5.5	£2.5	£9.0	£1.5	£0.0
Zone 6 - Maghera	£18.8	£4.3	£0.0	£2.1	£2.2	£0.0	£0.2	£14.2	£0.0
Zone 7 - Londonderry	£64.6	£5.0	£5.0	£0.0	£0.0	£0.0	£0.0	£0.5	£59.2
Outside Study Area	£54.3	£14.8	£4.0	£2.6	£2.9	£5.3	£20.4	£8.9	£10.2
Antrim	£7.0	£1.0	£1.0	£0.0	£0.0	£0.0	£1.8	£1.1	£3.1
Belfast	£9.1	£4.8	£1.9	£2.1	£0.3	£0.4	£1.9	£2.4	£0.0
Cookstown	£2.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.1	£0.0
Larne	£2.0	£1.3	£0.0	£0.0	£0.0	£1.3	£0.7	£0.0	£0.0
Omagh	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.0
Strabane	£3.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.9
Outside Study Area - Other	£29.4	£7.7	£1.0	£0.5	£2.6	£3.6	£16.0	£2.5	£3.3
<b>Total</b>	<b>£251.4</b>	<b>£114.3</b>	<b>£25.0</b>	<b>£48.1</b>	<b>£30.2</b>	<b>£11.0</b>	<b>£30.7</b>	<b>£30.1</b>	<b>£76.4</b>

Notes:

a. Figures may not add up due to rounding.

**Table 12a:**  
Recreational goods  
Shopping Patterns (%)

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Zones 1-4	28.8%	61.5%	48.5%	87.3%	47.1%	8.9%	0.0%	1.2%	1.2%
Zone 1 - Limavady	2.8%	5.4%	25.8%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%
Limavady	2.3%	4.3%	20.6%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%
Zone 1 - Other	0.5%	1.1%	5.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 - Coleraine	21.1%	45.7%	22.7%	80.6%	18.9%	5.9%	0.0%	1.2%	0.0%
Coleraine	20.9%	45.2%	22.7%	79.5%	18.9%	5.9%	0.0%	1.2%	0.0%
Portrush	0.2%	0.5%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Portstewart	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 3 - Ballymoney	4.7%	10.0%	0.0%	6.7%	28.2%	0.0%	0.0%	0.0%	0.0%
Ballymoney	4.7%	10.0%	0.0%	6.7%	28.2%	0.0%	0.0%	0.0%	0.0%
Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 4 - The Glens	0.1%	0.3%	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%	0.0%
Ballycastle	0.1%	0.3%	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%	0.0%
Zone 4 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zones 5-7	45.5%	19.6%	36.8%	9.5%	20.1%	26.6%	29.6%	61.2%	86.1%
Zone 5 - Ballymena	11.0%	12.3%	7.2%	9.5%	16.0%	26.6%	29.6%	14.0%	0.0%
Zone 6 - Maghera	5.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	43.2%	0.0%
Zone 7 - Londonderry	29.0%	7.3%	29.7%	0.0%	4.2%	0.0%	0.0%	4.0%	86.1%
Outside Study Area	25.7%	19.0%	14.6%	3.2%	32.8%	64.4%	70.4%	37.6%	12.7%
Antrim	1.9%	3.1%	14.6%	0.0%	0.0%	0.0%	0.0%	1.2%	1.2%
Belfast	0.5%	0.4%	0.0%	0.0%	0.0%	4.3%	0.0%	2.5%	0.0%
Cookstown	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	19.9%	0.0%
Larne	1.0%	2.9%	0.0%	0.0%	0.0%	30.1%	0.0%	0.0%	0.0%
Omagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Strabane	4.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.7%	11.5%
Outside Study Area - Other	15.8%	12.5%	0.0%	3.2%	32.8%	30.0%	70.4%	8.4%	0.0%
<b>Total</b>	<b>100.0%</b>								

Notes:

a. Figures may not add up due to rounding.

**Table 12b:**  
Recreational goods  
Shopping Expenditure (£m at 2025)

2023 Prices

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Zones 1-4	£35.9	£35.2	£5.9	£22.1	£6.8	£0.5	£0.0	£0.2	£0.5
Zone 1 - Limavady	£3.6	£3.1	£3.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
Limavady	£3.0	£2.5	£2.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
Zone 1 - Other	£0.6	£0.6	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 2 - Coleraine	£26.4	£26.2	£2.7	£20.4	£2.7	£0.3	£0.0	£0.2	£0.0
Coleraine	£26.1	£25.9	£2.7	£20.1	£2.7	£0.3	£0.0	£0.2	£0.0
Portrush	£0.3	£0.3	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0
Portstewart	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 2 - Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 3 - Ballymoney	£5.8	£5.8	£0.0	£1.7	£4.1	£0.0	£0.0	£0.0	£0.0
Ballymoney	£5.8	£5.8	£0.0	£1.7	£4.1	£0.0	£0.0	£0.0	£0.0
Zone 3 - Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 4 - The Glens	£0.2	£0.2	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0
Ballycastle	£0.2	£0.2	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0
Zone 4 - Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zones 5-7	£58.5	£11.2	£4.5	£2.4	£2.9	£1.5	£4.7	£8.8	£33.8
Zone 5 - Ballymena	£13.7	£7.1	£0.9	£2.4	£2.3	£1.5	£4.7	£2.0	£0.0
Zone 6 - Maghera	£6.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£6.2	£0.0
Zone 7 - Londonderry	£38.6	£4.2	£3.6	£0.0	£0.6	£0.0	£0.0	£0.6	£33.8
Outside Study Area	£32.4	£10.9	£1.8	£0.8	£4.7	£3.6	£11.1	£5.4	£5.0
Antrim	£2.4	£1.8	£1.8	£0.0	£0.0	£0.0	£0.0	£0.2	£0.5
Belfast	£0.6	£0.2	£0.0	£0.0	£0.0	£0.2	£0.0	£0.4	£0.0
Cookstown	£2.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.9	£0.0
Larne	£1.7	£1.7	£0.0	£0.0	£0.0	£1.7	£0.0	£0.0	£0.0
Omagh	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Strabane	£5.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£4.5
Outside Study Area - Other	£19.5	£7.2	£0.0	£0.8	£4.7	£1.7	£11.1	£1.2	£0.0
<b>Total</b>	<b>£126.8</b>	<b>£57.3</b>	<b>£12.1</b>	<b>£25.3</b>	<b>£14.4</b>	<b>£5.6</b>	<b>£15.8</b>	<b>£14.4</b>	<b>£39.3</b>

Notes:

a. Figures may not add up due to rounding.

**Table 13a:**  
**Chemist goods**  
**Shopping Patterns (%)**

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
<b>Zones 1-4</b>	<b>41.2%</b>	<b>86.6%</b>	<b>82.6%</b>	<b>100.0%</b>	<b>78.8%</b>	<b>50.3%</b>	<b>0.5%</b>	<b>6.3%</b>	<b>4.1%</b>
<b>Zone 1 - Limavady</b>	<b>9.3%</b>	<b>15.1%</b>	<b>77.9%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>3.1%</b>
Limavady	7.6%	12.4%	63.9%	0.0%	0.0%	0.0%	0.0%	0.0%	2.6%
Zone 1 - Other	1.7%	2.7%	14.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
<b>Zone 2 - Coleraine</b>	<b>20.6%</b>	<b>48.9%</b>	<b>4.7%</b>	<b>94.4%</b>	<b>12.8%</b>	<b>5.0%</b>	<b>0.0%</b>	<b>5.1%</b>	<b>1.0%</b>
Coleraine	16.3%	38.0%	4.7%	72.4%	10.5%	5.0%	0.0%	5.1%	1.0%
Portrush	0.8%	2.1%	0.0%	4.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Portstewart	0.2%	0.5%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 - Other	3.3%	8.3%	0.0%	16.5%	2.3%	0.0%	0.0%	0.0%	0.0%
<b>Zone 3 - Ballymoney</b>	<b>9.6%</b>	<b>18.0%</b>	<b>0.0%</b>	<b>5.6%</b>	<b>66.0%</b>	<b>1.1%</b>	<b>0.5%</b>	<b>1.2%</b>	<b>0.0%</b>
Ballymoney	8.8%	16.7%	0.0%	5.6%	60.4%	1.1%	0.5%	0.6%	0.0%
Zone 3 - Other	0.8%	1.3%	0.0%	0.0%	5.6%	0.0%	0.0%	0.6%	0.0%
<b>Zone 4 - The Glens</b>	<b>1.8%</b>	<b>4.6%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>44.2%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
Ballycastle	0.5%	1.3%	0.0%	0.0%	0.0%	12.3%	0.0%	0.0%	0.0%
Zone 4 - Other	1.3%	3.3%	0.0%	0.0%	0.0%	31.9%	0.0%	0.0%	0.0%
<b>Zones 5-7</b>	<b>44.1%</b>	<b>6.0%</b>	<b>11.3%</b>	<b>0.0%</b>	<b>11.1%</b>	<b>12.1%</b>	<b>49.6%</b>	<b>70.5%</b>	<b>87.7%</b>
<b>Zone 5 - Ballymena</b>	<b>8.9%</b>	<b>4.4%</b>	<b>2.9%</b>	<b>0.0%</b>	<b>11.1%</b>	<b>12.1%</b>	<b>49.6%</b>	<b>6.2%</b>	<b>0.0%</b>
Zone 6 - Maghera	7.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	64.2%	0.0%
Zone 7 - Londonderry	28.0%	1.6%	8.4%	0.0%	0.0%	0.0%	0.0%	0.0%	87.7%
<b>Outside Study Area</b>	<b>14.6%</b>	<b>7.4%</b>	<b>6.0%</b>	<b>0.0%</b>	<b>10.0%</b>	<b>37.6%</b>	<b>49.9%</b>	<b>23.2%</b>	<b>8.2%</b>
Antrim	0.3%	0.6%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Belfast	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	3.5%	2.3%
Cookstown	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.5%	0.0%
Larne	0.8%	2.1%	0.0%	0.0%	0.0%	20.7%	0.0%	0.0%	0.0%
Omagh	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%
Strabane	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	5.9%
Outside Study Area - Other	8.7%	4.7%	3.0%	0.0%	10.0%	16.9%	47.8%	5.8%	0.0%
<b>Total</b>	<b>100.0%</b>								

Notes:

a. Figures may not add up due to rounding.

**Table 13b:**  
**Chemist goods**  
**Shopping Expenditure (£m at 2025)**

2023 Prices

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
<b>Zones 1-4</b>	<b>£23.9</b>	<b>£22.6</b>	<b>£4.2</b>	<b>£12.3</b>	<b>£4.8</b>	<b>£1.4</b>	<b>£0.0</b>	<b>£0.4</b>	<b>£0.8</b>
<b>Zone 1 - Limavady</b>	<b>£4.5</b>	<b>£3.9</b>	<b>£3.9</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.6</b>
Limavady	£3.7	£3.2	£3.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
Zone 1 - Other	£0.8	£0.7	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
<b>Zone 2 - Coleraine</b>	<b>£13.3</b>	<b>£12.8</b>	<b>£0.2</b>	<b>£11.6</b>	<b>£0.8</b>	<b>£0.1</b>	<b>£0.0</b>	<b>£0.3</b>	<b>£0.2</b>
Coleraine	£10.4	£9.9	£0.2	£8.9	£0.6	£0.1	£0.0	£0.3	£0.2
Portrush	£0.5	£0.5	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0
Portstewart	£0.1	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 2 - Other	£2.2	£2.2	£0.0	£2.0	£0.1	£0.0	£0.0	£0.0	£0.0
<b>Zone 3 - Ballymoney</b>	<b>£4.8</b>	<b>£4.7</b>	<b>£0.0</b>	<b>£0.7</b>	<b>£4.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.1</b>	<b>£0.0</b>
Ballymoney	£4.5	£4.4	£0.0	£0.7	£3.7	£0.0	£0.0	£0.0	£0.0
Zone 3 - Other	£0.4	£0.3	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0
<b>Zone 4 - The Glens</b>	<b>£1.2</b>	<b>£1.2</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£1.2</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>
Ballycastle	£0.3	£0.3	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0
Zone 4 - Other	£0.9	£0.9	£0.0	£0.0	£0.0	£0.9	£0.0	£0.0	£0.0
<b>Zones 5-7</b>	<b>£26.5</b>	<b>£1.6</b>	<b>£0.6</b>	<b>£0.0</b>	<b>£0.7</b>	<b>£0.3</b>	<b>£3.8</b>	<b>£4.3</b>	<b>£16.8</b>
<b>Zone 5 - Ballymena</b>	<b>£5.3</b>	<b>£1.1</b>	<b>£0.1</b>	<b>£0.0</b>	<b>£0.7</b>	<b>£0.3</b>	<b>£3.8</b>	<b>£0.4</b>	<b>£0.0</b>
Zone 6 - Maghera	£3.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.9	£0.0
Zone 7 - Londonderry	£17.3	£0.4	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£16.8
<b>Outside Study Area</b>	<b>£8.7</b>	<b>£1.9</b>	<b>£0.3</b>	<b>£0.0</b>	<b>£0.6</b>	<b>£1.0</b>	<b>£3.8</b>	<b>£1.4</b>	<b>£1.6</b>
Antrim	£0.2	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Belfast	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.2	£0.4
Cookstown	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.0
Larne	£0.6	£0.6	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0
Omagh	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Strabane	£1.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£1.1	£0.0
Outside Study Area - Other	£5.2	£1.2	£0.2	£0.0	£0.6	£0.5	£3.6	£0.4	£0.0
<b>Total</b>	<b>£59.1</b>	<b>£26.2</b>	<b>£5.1</b>	<b>£12.3</b>	<b>£6.1</b>	<b>£2.7</b>	<b>£7.6</b>	<b>£6.1</b>	<b>£19.2</b>

Notes:

a. Figures may not add up due to rounding.

**Table 14a:**  
**Electrical goods**  
**Shopping Patterns (%)**

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
<b>Zones 1-4</b>	<b>48.7%</b>	<b>78.2%</b>	<b>65.8%</b>	<b>95.8%</b>	<b>79.5%</b>	<b>28.8%</b>	<b>16.0%</b>	<b>26.5%</b>	<b>19.2%</b>
<b>Zone 1 - Limavady</b>	<b>10.3%</b>	<b>10.2%</b>	<b>44.1%</b>	<b>1.4%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>15.5%</b>
Limavady	10.3%	10.2%	44.1%	1.4%	0.0%	0.0%	0.0%	0.0%	15.5%
Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Zone 2 - Coleraine</b>	<b>25.6%</b>	<b>45.8%</b>	<b>18.3%</b>	<b>75.8%</b>	<b>35.2%</b>	<b>6.2%</b>	<b>0.7%</b>	<b>20.4%</b>	<b>3.7%</b>
Coleraine	19.4%	37.3%	17.6%	61.4%	27.4%	4.1%	0.7%	7.3%	1.5%
Portrush	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%
Portstewart	3.3%	5.6%	0.0%	13.1%	0.0%	0.0%	0.0%	0.0%	2.2%
Zone 2 - Other	2.8%	3.0%	0.8%	1.4%	7.8%	2.0%	0.0%	12.3%	0.0%
<b>Zone 3 - Ballymoney</b>	<b>12.2%</b>	<b>20.0%</b>	<b>3.4%</b>	<b>18.6%</b>	<b>43.6%</b>	<b>2.0%</b>	<b>15.3%</b>	<b>6.1%</b>	<b>0.0%</b>
Ballymoney	12.0%	19.8%	3.4%	18.6%	42.8%	2.0%	15.3%	5.2%	0.0%
Zone 3 - Other	0.2%	0.2%	0.0%	0.0%	0.8%	0.0%	0.0%	0.9%	0.0%
<b>Zone 4 - The Glens</b>	<b>0.7%</b>	<b>2.3%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.8%</b>	<b>20.6%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
Ballycastle	0.7%	2.2%	0.0%	0.0%	0.8%	19.6%	0.0%	0.0%	0.0%
Zone 4 - Other	0.0%	0.1%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%
<b>Zones 5-7</b>	<b>36.9%</b>	<b>11.8%</b>	<b>21.2%</b>	<b>2.0%</b>	<b>10.1%</b>	<b>37.0%</b>	<b>42.2%</b>	<b>45.3%</b>	<b>74.2%</b>
<b>Zone 5 - Ballymena</b>	<b>8.0%</b>	<b>6.4%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>10.1%</b>	<b>37.0%</b>	<b>41.5%</b>	<b>6.1%</b>	<b>0.0%</b>
Zone 6 - Maghera	4.1%	0.2%	0.8%	0.0%	0.0%	0.0%	0.7%	35.4%	0.0%
Zone 7 - Londonderry	24.9%	5.3%	20.4%	2.0%	0.0%	0.0%	0.0%	3.7%	74.2%
<b>Outside Study Area</b>	<b>14.4%</b>	<b>9.9%</b>	<b>13.0%</b>	<b>2.2%</b>	<b>10.4%</b>	<b>34.2%</b>	<b>41.8%</b>	<b>28.2%</b>	<b>6.6%</b>
Antrim	0.7%	0.8%	3.6%	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%
Belfast	1.8%	2.5%	5.9%	2.2%	0.0%	3.0%	0.7%	3.7%	0.0%
Cookstown	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.6%	0.0%
Larne	0.2%	0.8%	0.0%	0.0%	0.0%	7.6%	0.0%	0.0%	0.0%
Omagh	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%
Strabane	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.9%
Outside Study Area - Other	8.4%	5.8%	3.6%	0.0%	10.4%	23.6%	41.1%	7.5%	0.8%
<b>Total</b>	<b>100.0%</b>								

Notes:

a. Figures may not add up due to rounding.

**Table 14b:**  
**Electrical goods**  
**Shopping Expenditure (£m at 2025)**

2023 Prices

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
<b>Zones 1-4</b>	<b>£57.5</b>	<b>£44.1</b>	<b>£8.1</b>	<b>£22.9</b>	<b>£11.4</b>	<b>£1.7</b>	<b>£2.4</b>	<b>£3.8</b>	<b>£7.3</b>
<b>Zone 1 - Limavady</b>	<b>£11.6</b>	<b>£5.7</b>	<b>£5.4</b>	<b>£0.3</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£5.9</b>
Limavady	£11.6	£5.7	£5.4	£0.3	£0.0	£0.0	£0.0	£0.0	£5.9
Zone 1 - Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<b>Zone 2 - Coleraine</b>	<b>£30.2</b>	<b>£25.8</b>	<b>£2.3</b>	<b>£18.1</b>	<b>£5.1</b>	<b>£0.4</b>	<b>£0.1</b>	<b>£2.9</b>	<b>£1.4</b>
Coleraine	£22.7	£21.0	£2.2	£14.7	£3.9	£0.2	£0.1	£1.0	£0.6
Portrush	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
Portstewart	£4.0	£3.1	£0.0	£3.1	£0.0	£0.0	£0.0	£0.0	£0.8
Zone 2 - Other	£3.4	£1.7	£0.1	£0.3	£1.1	£0.1	£0.0	£1.7	£0.0
<b>Zone 3 - Ballymoney</b>	<b>£14.4</b>	<b>£11.3</b>	<b>£0.4</b>	<b>£4.4</b>	<b>£6.3</b>	<b>£0.1</b>	<b>£2.2</b>	<b>£0.9</b>	<b>£0.0</b>
Ballymoney	£14.1	£11.1	£0.4	£4.4	£6.2	£0.1	£2.2	£0.7	£0.0
Zone 3 - Other	£0.2	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.1	£0.0
<b>Zone 4 - The Glens</b>	<b>£1.3</b>	<b>£1.3</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.1</b>	<b>£1.2</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>
Ballycastle	£1.2	£1.2	£0.0	£0.0	£0.1	£1.1	£0.0	£0.0	£0.0
Zone 4 - Other	£0.1	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0
<b>Zones 5-7</b>	<b>£47.5</b>	<b>£6.7</b>	<b>£2.6</b>	<b>£0.5</b>	<b>£1.5</b>	<b>£2.1</b>	<b>£6.2</b>	<b>£6.4</b>	<b>£28.2</b>
<b>Zone 5 - Ballymena</b>	<b>£10.6</b>	<b>£3.6</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£1.5</b>	<b>£2.1</b>	<b>£6.1</b>	<b>£0.9</b>	<b>£0.0</b>
Zone 6 - Maghera	£5.2	£0.1	£0.1	£0.0	£0.0	£0.0	£0.1	£5.0	£0.0
Zone 7 - Londonderry	£31.7	£3.0	£2.5	£0.5	£0.0	£0.0	£0.0	£0.5	£28.2
<b>Outside Study Area</b>	<b>£18.3</b>	<b>£5.6</b>	<b>£1.6</b>	<b>£0.5</b>	<b>£1.5</b>	<b>£2.0</b>	<b>£6.1</b>	<b>£4.0</b>	<b>£2.5</b>
Antrim	£0.8	£0.4	£0.4	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0
Belfast	£2.1	£1.4	£0.7	£0.5	£0.0	£0.2	£0.1	£0.5	£0.0
Cookstown	£1.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.9	£0.0
Larne	£0.4	£0.4	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0
Omagh	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
Strabane	£2.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.2
Outside Study Area - Other	£10.7	£3.3	£0.4	£0.0	£1.5	£1.4	£6.0	£1.1	£0.3
<b>Total</b>	<b>£123.2</b>	<b>£56.4</b>	<b>£12.3</b>	<b>£23.9</b>	<b>£14.4</b>	<b>£5.8</b>	<b>£14.7</b>	<b>£14.2</b>	<b>£38.0</b>

Notes:

a. Figures may not add up due to rounding.

**Table 15a:**  
**DIY goods**  
**Shopping Patterns (%)**

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Zones 1-4	47.8%	83.5%	85.9%	97.7%	77.5%	38.5%	3.7%	14.6%	12.9%
Zone 1 - Limavady	10.5%	14.9%	68.2%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Limavady	9.9%	13.9%	63.6%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Zone 1 - Other	0.6%	1.0%	4.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 - Coleraine	32.2%	57.6%	17.7%	97.7%	46.9%	12.1%	2.3%	12.0%	7.9%
Coleraine	27.0%	47.2%	16.2%	82.3%	33.7%	9.7%	2.3%	12.0%	7.0%
Portrush	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Portstewart	0.1%	0.3%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 - Other	5.1%	10.1%	1.5%	14.7%	13.2%	2.4%	0.0%	0.0%	0.9%
Zone 3 - Ballymoney	4.1%	8.4%	0.0%	0.0%	30.6%	1.6%	1.4%	2.6%	0.0%
Ballymoney	3.5%	7.8%	0.0%	0.0%	28.8%	0.0%	0.0%	0.9%	0.0%
Zone 3 - Other	0.6%	0.6%	0.0%	0.0%	1.7%	1.6%	1.4%	1.7%	0.0%
Zone 4 - The Glens	1.0%	2.6%	0.0%	0.0%	0.0%	24.8%	0.0%	0.0%	0.0%
Ballycastle	0.5%	1.3%	0.0%	0.0%	0.0%	12.9%	0.0%	0.0%	0.0%
Zone 4 - Other	0.5%	1.3%	0.0%	0.0%	0.0%	12.0%	0.0%	0.0%	0.0%
Zones 5-7	33.7%	6.4%	12.6%	2.3%	5.9%	10.6%	34.2%	55.3%	76.0%
Zone 5 - Ballymena	5.9%	2.5%	0.0%	0.0%	5.1%	10.6%	34.2%	4.2%	0.0%
Zone 6 - Maghera	6.1%	0.4%	0.8%	0.0%	0.9%	0.0%	0.0%	50.2%	0.0%
Zone 7 - Londonderry	21.7%	3.5%	11.9%	2.3%	0.0%	0.0%	0.0%	0.9%	76.0%
Outside Study Area	18.5%	10.1%	1.5%	0.0%	16.6%	50.9%	62.1%	30.1%	11.1%
Antrim	0.7%	0.2%	0.0%	0.0%	0.0%	2.3%	0.0%	5.6%	0.0%
Belfast	0.4%	0.9%	0.0%	0.0%	2.5%	2.3%	0.0%	0.0%	0.0%
Cookstown	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	14.4%	0.0%
Larne	0.8%	2.0%	0.0%	0.0%	0.0%	18.9%	0.0%	0.0%	0.0%
Omagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Strabane	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.1%
Outside Study Area - Other	12.1%	7.0%	1.5%	0.0%	14.1%	27.3%	62.1%	10.1%	0.0%
<b>Total</b>	<b>100.0%</b>								

Notes:

a. Figures may not add up due to rounding.

**Table 15b:**  
**DIY goods**  
**Shopping Expenditure (£m at 2025)**

2023 Prices

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Zones 1-4	£39.1	£34.2	£7.7	£16.3	£8.6	£1.6	£0.4	£1.6	£2.9
Zone 1 - Limavady	£7.2	£6.1	£6.1	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1
Limavady	£6.8	£5.7	£5.7	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1
Zone 1 - Other	£0.4	£0.4	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 2 - Coleraine	£27.0	£23.6	£1.6	£16.3	£5.2	£0.5	£0.2	£1.3	£1.8
Coleraine	£22.5	£19.3	£1.4	£13.8	£3.7	£0.4	£0.2	£1.3	£1.6
Portrush	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Portstewart	£0.1	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 2 - Other	£4.4	£4.2	£0.1	£2.5	£1.5	£0.1	£0.0	£0.0	£0.2
Zone 3 - Ballymoney	£3.9	£3.5	£0.0	£0.0	£3.4	£0.1	£0.1	£0.3	£0.0
Ballymoney	£3.3	£3.2	£0.0	£0.0	£3.2	£0.0	£0.0	£0.1	£0.0
Zone 3 - Other	£0.6	£0.3	£0.0	£0.0	£0.2	£0.1	£0.1	£0.2	£0.0
Zone 4 - The Glens	£1.1	£1.1	£0.0	£0.0	£0.0	£1.1	£0.0	£0.0	£0.0
Ballycastle	£0.6	£0.6	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0
Zone 4 - Other	£0.5	£0.5	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0
Zones 5-7	£29.3	£2.6	£1.1	£0.4	£0.7	£0.5	£3.4	£6.2	£17.1
Zone 5 - Ballymena	£4.9	£1.0	£0.0	£0.0	£0.6	£0.5	£3.4	£0.5	£0.0
Zone 6 - Maghera	£5.8	£0.2	£0.1	£0.0	£0.1	£0.0	£0.0	£5.6	£0.0
Zone 7 - Londonderry	£18.6	£1.4	£1.1	£0.4	£0.0	£0.0	£0.0	£0.1	£17.1
Outside Study Area	£16.2	£4.1	£0.1	£0.0	£1.8	£2.2	£6.2	£3.4	£2.5
Antrim	£0.7	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0	£0.6	£0.0
Belfast	£0.4	£0.4	£0.0	£0.0	£0.3	£0.1	£0.0	£0.0	£0.0
Cookstown	£1.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£0.0
Larne	£0.8	£0.8	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0
Omagh	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Strabane	£2.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.5
Outside Study Area - Other	£10.2	£2.9	£0.1	£0.0	£1.6	£1.2	£6.2	£1.1	£0.0
<b>Total</b>	<b>£84.7</b>	<b>£41.0</b>	<b>£8.9</b>	<b>£16.7</b>	<b>£11.1</b>	<b>£4.3</b>	<b>£10.0</b>	<b>£11.2</b>	<b>£22.5</b>

Notes:

a. Figures may not add up due to rounding.

**Table 16a:**  
Furniture goods  
Shopping Patterns (%)

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
<b>Zones 1-4</b>	<b>38.6%</b>	<b>71.8%</b>	<b>53.7%</b>	<b>82.9%</b>	<b>83.0%</b>	<b>25.3%</b>	<b>11.7%</b>	<b>5.1%</b>	<b>4.9%</b>
<b>Zone 1 - Limavady</b>	<b>5.2%</b>	<b>8.4%</b>	<b>40.5%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>4.9%</b>
Limavady	5.2%	8.4%	40.5%	0.0%	0.0%	0.0%	0.0%	0.0%	4.9%
Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Zone 2 - Coleraine</b>	<b>21.9%</b>	<b>44.0%</b>	<b>13.2%</b>	<b>74.6%</b>	<b>26.0%</b>	<b>8.5%</b>	<b>2.2%</b>	<b>5.1%</b>	<b>0.0%</b>
Coleraine	21.7%	44.0%	13.2%	74.6%	26.0%	8.5%	2.2%	4.0%	0.0%
Portrush	0.0%	0.1%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%
Portstewart	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 - Other	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%
<b>Zone 3 - Ballymoney</b>	<b>10.9%</b>	<b>18.4%</b>	<b>0.0%</b>	<b>8.3%</b>	<b>57.0%</b>	<b>5.7%</b>	<b>9.5%</b>	<b>0.0%</b>	<b>0.0%</b>
Ballymoney	10.0%	17.5%	0.0%	7.5%	55.2%	5.0%	6.4%	0.0%	0.0%
Zone 3 - Other	0.9%	0.9%	0.0%	0.8%	1.8%	0.7%	3.1%	0.0%	0.0%
<b>Zone 4 - The Glens</b>	<b>0.6%</b>	<b>1.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>11.1%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
Ballycastle	0.6%	1.0%	0.0%	0.0%	0.0%	11.1%	0.0%	0.0%	0.0%
Zone 4 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Zones 5-7</b>	<b>39.9%</b>	<b>11.1%</b>	<b>19.0%</b>	<b>3.4%</b>	<b>8.6%</b>	<b>39.2%</b>	<b>52.2%</b>	<b>53.8%</b>	<b>82.8%</b>
<b>Zone 5 - Ballymena</b>	<b>11.3%</b>	<b>6.1%</b>	<b>1.2%</b>	<b>0.8%</b>	<b>8.6%</b>	<b>37.2%</b>	<b>51.5%</b>	<b>4.0%</b>	<b>0.0%</b>
Zone 6 - Maghera	5.9%	0.2%	0.0%	0.0%	0.0%	2.1%	0.7%	49.8%	0.0%
Zone 7 - Londonderry	22.7%	4.9%	17.8%	2.6%	0.0%	0.0%	0.0%	0.0%	82.8%
<b>Outside Study Area</b>	<b>21.5%</b>	<b>17.1%</b>	<b>27.3%</b>	<b>13.7%</b>	<b>8.3%</b>	<b>35.5%</b>	<b>36.1%</b>	<b>41.1%</b>	<b>12.3%</b>
Antrim	0.5%	1.1%	5.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Belfast	6.7%	8.6%	15.6%	10.3%	2.6%	0.0%	9.1%	1.0%	4.9%
Cookstown	2.8%	1.0%	1.2%	0.0%	2.9%	0.0%	0.0%	20.1%	0.0%
Larne	1.6%	2.2%	0.0%	0.0%	0.0%	24.5%	2.1%	0.0%	0.0%
Omagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Strabane	1.2%	0.8%	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%
Outside Study Area - Other	8.7%	3.5%	1.2%	3.4%	2.9%	11.0%	24.9%	20.0%	4.3%
<b>Total</b>	<b>100.0%</b>								

Notes:

a. Figures may not add up due to rounding.

**Table 16b:**  
Furniture goods  
Shopping Expenditure (£m at 2025)

2023 Prices

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
<b>Zones 1-4</b>	<b>£37.9</b>	<b>£34.1</b>	<b>£5.3</b>	<b>£18.0</b>	<b>£9.8</b>	<b>£1.1</b>	<b>£1.6</b>	<b>£0.6</b>	<b>£1.6</b>
<b>Zone 1 - Limavady</b>	<b>£5.6</b>	<b>£4.0</b>	<b>£4.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£1.6</b>
Limavady	£5.6	£4.0	£4.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6
Zone 1 - Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<b>Zone 2 - Coleraine</b>	<b>£21.8</b>	<b>£20.9</b>	<b>£1.3</b>	<b>£16.2</b>	<b>£3.1</b>	<b>£0.4</b>	<b>£0.3</b>	<b>£0.6</b>	<b>£0.0</b>
Coleraine	£21.6	£20.9	£1.3	£16.2	£3.1	£0.3	£0.3	£0.5	£0.0
Portrush	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Portstewart	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 2 - Other	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
<b>Zone 3 - Ballymoney</b>	<b>£10.1</b>	<b>£8.7</b>	<b>£0.0</b>	<b>£1.8</b>	<b>£6.7</b>	<b>£0.2</b>	<b>£1.3</b>	<b>£0.0</b>	<b>£0.0</b>
Ballymoney	£9.2	£8.3	£0.0	£1.6	£6.5	£0.2	£0.9	£0.0	£0.0
Zone 3 - Other	£0.8	£0.4	£0.0	£0.2	£0.2	£0.0	£0.4	£0.0	£0.0
<b>Zone 4 - The Glens</b>	<b>£0.5</b>	<b>£0.5</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.5</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.0</b>
Ballycastle	£0.5	£0.5	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0
Zone 4 - Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<b>Zones 5-7</b>	<b>£46.6</b>	<b>£5.3</b>	<b>£1.9</b>	<b>£0.7</b>	<b>£1.0</b>	<b>£1.7</b>	<b>£7.3</b>	<b>£6.3</b>	<b>£27.8</b>
<b>Zone 5 - Ballymena</b>	<b>£10.5</b>	<b>£2.9</b>	<b>£0.1</b>	<b>£0.2</b>	<b>£1.0</b>	<b>£1.6</b>	<b>£7.1</b>	<b>£0.5</b>	<b>£0.0</b>
Zone 6 - Maghera	£6.0	£0.1	£0.0	£0.0	£0.0	£0.1	£0.1	£5.8	£0.0
Zone 7 - Londonderry	£30.1	£2.3	£1.7	£0.6	£0.0	£0.0	£0.0	£0.0	£27.8
<b>Outside Study Area</b>	<b>£22.1</b>	<b>£8.1</b>	<b>£2.7</b>	<b>£3.0</b>	<b>£1.0</b>	<b>£1.5</b>	<b>£5.0</b>	<b>£4.8</b>	<b>£4.1</b>
Antrim	£0.5	£0.5	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Belfast	£7.1	£4.1	£1.5	£2.2	£0.3	£0.0	£1.3	£0.1	£1.6
Cookstown	£2.8	£0.5	£0.1	£0.0	£0.3	£0.0	£0.0	£2.4	£0.0
Larne	£1.3	£1.0	£0.0	£0.0	£0.0	£1.0	£0.3	£0.0	£0.0
Omagh	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Strabane	£1.4	£0.4	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1
Outside Study Area - Other	£8.9	£1.7	£0.1	£0.7	£0.3	£0.5	£3.5	£2.3	£1.4
<b>Total</b>	<b>£106.6</b>	<b>£47.4</b>	<b>£9.8</b>	<b>£21.7</b>	<b>£11.8</b>	<b>£4.2</b>	<b>£13.9</b>	<b>£11.7</b>	<b>£33.5</b>

Notes:

a. Figures may not add up due to rounding.

**Table 17a:**  
**Comparison goods**  
**Shopping Patterns (%)**

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Zones 1-4	35.9%	69.3%	59.9%	85.8%	65.9%	26.4%	5.0%	11.6%	8.4%
Zone 1 - Limavady	5.8%	9.5%	39.4%	2.5%	0.0%	0.0%	0.0%	0.0%	4.8%
Limavady	5.6%	9.1%	37.8%	2.3%	0.0%	0.0%	0.0%	0.0%	4.7%
Zone 1 - Other	0.2%	0.4%	1.6%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 - Coleraine	23.2%	46.3%	19.2%	75.9%	33.4%	9.8%	0.8%	9.8%	3.4%
Coleraine	20.8%	42.1%	18.4%	68.4%	30.0%	9.2%	0.8%	7.0%	2.8%
Portrush	0.5%	1.0%	0.3%	2.0%	0.3%	0.1%	0.0%	0.3%	0.0%
Portstewart	0.9%	1.6%	0.2%	3.1%	1.0%	0.0%	0.0%	0.2%	0.4%
Zone 2 - Other	1.1%	1.7%	0.2%	2.4%	2.1%	0.5%	0.0%	2.3%	0.3%
Zone 3 - Ballymoney	6.2%	12.1%	1.3%	7.4%	32.1%	3.4%	3.5%	1.8%	0.2%
Ballymoney	5.9%	11.8%	1.3%	7.4%	31.5%	3.1%	2.6%	1.5%	0.1%
Zone 3 - Other	0.3%	0.2%	0.0%	0.1%	0.6%	0.3%	0.9%	0.3%	0.1%
Zone 4 - The Glens	0.7%	1.4%	0.0%	0.0%	0.3%	13.2%	0.7%	0.0%	0.0%
Ballycastle	0.6%	1.1%	0.0%	0.0%	0.3%	9.9%	0.7%	0.0%	0.0%
Zone 4 - Other	0.1%	0.3%	0.0%	0.0%	0.0%	3.3%	0.0%	0.0%	0.0%
Zones 5-7	44.1%	16.6%	25.3%	7.3%	19.5%	30.9%	44.5%	53.5%	80.4%
Zone 5 - Ballymena	10.6%	8.5%	1.8%	2.6%	15.5%	30.4%	43.2%	11.3%	0.4%
Zone 6 - Maghera	5.8%	1.1%	0.6%	1.2%	1.7%	0.2%	0.3%	40.7%	1.9%
Zone 7 - Londonderry	27.7%	7.1%	22.9%	3.5%	2.3%	0.3%	1.0%	1.5%	78.1%
Outside Study Area	20.1%	14.1%	14.8%	6.9%	14.6%	42.7%	50.5%	34.9%	11.2%
Antrim	2.2%	1.7%	4.8%	1.1%	0.2%	1.2%	3.5%	3.1%	2.1%
Belfast	3.4%	4.8%	7.2%	4.9%	3.1%	3.1%	4.2%	4.4%	0.8%
Cookstown	1.6%	0.1%	0.2%	0.0%	0.2%	0.0%	0.0%	12.3%	0.5%
Larne	0.9%	1.6%	0.1%	0.0%	0.0%	16.3%	1.4%	0.3%	0.0%
Omagh	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.1%
Strabane	2.0%	0.1%	0.4%	0.0%	0.0%	0.0%	0.0%	0.7%	6.0%
Outside Study Area - Other	9.6%	5.8%	2.1%	0.9%	11.0%	22.1%	41.3%	11.7%	1.7%
<b>Total</b>	<b>100.0%</b>								

Notes:

a. Figures may not add up due to rounding.

**Table 17b:**  
**Comparison goods**  
**Shopping Expenditure (£m at 2025)**

2023 Prices

Destination	Total	Zones 1-4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Zones 1-4	£421.4	£367.9	£68.3	£196.2	£89.7	£13.7	£7.3	£15.7	£30.5
Zone 1 - Limavady	£68.0	£50.6	£44.9	£5.7	£0.0	£0.0	£0.0	£0.0	£17.3
Limavady	£65.6	£48.3	£43.1	£5.2	£0.0	£0.0	£0.0	£0.0	£17.2
Zone 1 - Other	£2.4	£2.3	£1.8	£0.5	£0.0	£0.0	£0.0	£0.0	£0.1
Zone 2 - Coleraine	£272.9	£245.9	£21.8	£173.5	£45.5	£5.1	£1.2	£13.3	£12.5
Coleraine	£244.0	£223.2	£21.0	£156.5	£40.9	£4.8	£1.2	£9.5	£10.1
Portrush	£5.7	£5.4	£0.3	£4.6	£0.4	£0.0	£0.0	£0.4	£0.0
Portstewart	£10.4	£8.6	£0.3	£7.0	£1.3	£0.0	£0.0	£0.3	£1.5
Zone 2 - Other	£12.7	£8.8	£0.3	£5.4	£2.8	£0.3	£0.0	£3.1	£0.9
Zone 3 - Ballymoney	£72.3	£64.0	£1.5	£17.0	£43.7	£1.7	£5.1	£2.4	£0.7
Ballymoney	£68.8	£62.8	£1.5	£16.8	£42.9	£1.6	£3.7	£2.1	£0.2
Zone 3 - Other	£3.4	£1.2	£0.0	£0.2	£0.9	£0.1	£1.4	£0.4	£0.5
Zone 4 - The Glens	£8.2	£7.3	£0.0	£0.0	£0.4	£6.8	£0.9	£0.0	£0.0
Ballycastle	£6.5	£5.6	£0.0	£0.0	£0.4	£5.1	£0.9	£0.0	£0.0
Zone 4 - Other	£1.7	£1.7	£0.0	£0.0	£0.0	£1.7	£0.0	£0.0	£0.0
Zones 5-7	£517.7	£88.1	£28.8	£16.7	£26.6	£15.9	£64.2	£72.4	£293.0
Zone 5 - Ballymena	£124.0	£44.9	£2.1	£6.0	£21.1	£15.7	£62.3	£15.2	£1.5
Zone 6 - Maghera	£68.3	£5.7	£0.7	£2.6	£2.3	£0.1	£0.5	£55.1	£7.1
Zone 7 - Londonderry	£325.4	£37.4	£26.1	£8.0	£3.2	£0.1	£1.4	£2.1	£284.5
Outside Study Area	£235.5	£74.6	£16.9	£15.8	£19.9	£22.0	£72.9	£47.2	£40.8
Antrim	£25.8	£8.9	£5.5	£2.4	£0.3	£0.6	£5.1	£4.1	£7.7
Belfast	£40.2	£25.4	£8.2	£11.3	£4.3	£1.6	£6.1	£5.9	£2.8
Cookstown	£19.1	£0.5	£0.2	£0.0	£0.3	£0.0	£0.0	£16.7	£1.9
Larne	£10.9	£8.5	£0.1	£0.0	£0.0	£8.4	£2.1	£0.4	£0.0
Omagh	£3.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.3	£0.5
Strabane	£23.1	£0.5	£0.5	£0.0	£0.0	£0.0	£0.0	£1.0	£21.7
Outside Study Area - Other	£112.4	£30.8	£2.4	£2.0	£15.0	£11.4	£59.6	£15.8	£6.2
<b>Total</b>	<b>£1,174.6</b>	<b>£530.6</b>	<b>£114.1</b>	<b>£228.7</b>	<b>£136.2</b>	<b>£51.6</b>	<b>£144.3</b>	<b>£135.3</b>	<b>£364.4</b>

Notes:

a. Figures may not add up due to rounding.

**Causeway Coast & Glens Retail Capacity Assessment**

Nexus Planning

**2023 Prices**

Capacity Findings - Causeway Coast & Glens

**Table 18a-a: Comparison goods market share derived turnover (based on household survey results)**

	% Market Share	2025 Survey Turnover (£m)	2028 Survey Turnover (£m)	2031 Survey Turnover (£m)	2034 Survey Turnover (£m)	2038 Survey Turnover (£m)
Expenditure in the Study Area (£m)		£1,174.6	£1,225.0	£1,301.4	£1,374.0	£1,464.4
Expenditure directed to Causeway Coast and Glens	35.9%	£421.4	£439.4	£466.9	£492.9	£525.4

**Notes:**

a. Market Share percentage figures are derived from Table 17a. This is then applied to the total comparison goods expenditure available (excluding SFT) as taken from Table 8b

**Table 18b-a: Comparison goods market share derived turnover, and assumed inflow from outside of the Study Area (£m)**

	Estimated 'Inflow' from Outside Study Area	2025 Survey Turnover (£m)	2028 Survey Turnover (£m)	2031 Survey Turnover (£m)	2034 Survey Turnover (£m)	2038 Survey Turnover (£m)
Expenditure directed to Causeway Coast and Glens	3.4%	£435.8	£454.5	£482.9	£509.8	£543.4

**Notes:**

a. The inflow percentages have been estimated by Nexus. The inflow figures are then applied to the survey turnover as presented in Table 18a

**Table 18c-a: Extant comparison goods commitments**

Site Address	Application Reference	Summary of the Proposal	Net* Comparison Floorspace (sqm)	Estimated Sales Density (£ per sq m) at 2025	Estimated Comparison Turnover (£ m) - 2025	Estimated Comparison Turnover (£ m) - 2028	Estimated Comparison Turnover (£ m) - 2031	Estimated Comparison Turnover (£ m) - 2034	Estimated Comparison Turnover (£ m) - 2038
Limavady Town Centre 23-29 Catherine Street	LA01/2022/0470/F AC 19/02/2024	Proposed Demolition of Existing Licensed Premises and Construction of New Two Storey Retail Unit. (Assumed Comparison, not indicated on application form.) Net increase of 240 sqm comparison floorspace.	240	£4,800	£1.2	£1.2	£1.3	£1.4	£1.5
<b>Causeway Coast and Glens</b>			<b>240</b>		<b>£1.2</b>	<b>£1.2</b>	<b>£1.3</b>	<b>£1.4</b>	<b>£1.5</b>

**Notes:**

a. The list of commitments and the associated net sales areas have been provided by the Council.

b. Sales density is assumed to be £4,800 based on Nexus Planning judgement.

c. The turnover for respective years is "grown" using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

**Causeway Coast & Glens Retail Capacity Assessment**

Nexus Planning

**2023 Prices**

**Table 19a-a: Comparison Goods Capacity Assessment**

Assume Equilibrium at Base Year and Constant Market Shares

		2025	2028	2031	2034	2038
STEP 1:	Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£435.8	£454.5	£482.9	£509.8	£543.4
STEP 2:	Total Forecast "Benchmark" Turnover of all Floorspace (£m)	£435.8	£463.4	£496.1	£531.2	£581.7
STEP 3:	Available Expenditure before commitments (£m)		£8.9	£13.2	£21.3	£38.3
STEP 4:	Turnover of all committed floorspace (£m)		£1.2	£1.3	£1.4	£1.5
STEP 5:	<b>Surplus Expenditure (£m)</b>		<b>-£10.1</b>	<b>-£14.5</b>	<b>-£22.7</b>	<b>-£39.9</b>
STEP 6:	<b>MAXIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:</b>					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£3,500	£3,721	£3,984	£4,265	£4,672
	<b>(ii) MAXIMUM "Net" Floorspace Capacity (sq m):</b>		<b>-2,700</b>	<b>-3,600</b>	<b>-5,300</b>	<b>-8,500</b>
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-3,857	-5,143	-7,571	-12,143
STEP 7:	<b>MINIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:</b>					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,848	£6,261	£6,703	£7,341
	<b>(ii) MINIMUM "Net" Floorspace Capacity (sq m):</b>		<b>-1,700</b>	<b>-2,300</b>	<b>-3,400</b>	<b>-5,400</b>
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-2,429	-3,286	-4,857	-7,714

**Notes**

STEP 1: Survey Derived (with Inflow) turnovers assume constant market shares over the forecast period, derived from Table 18b.

STEP 2: Assumption is made that comparison retail market is in 'equilibrium' at the base year (i.e. 2025, 'benchmark' turnovers are equivalent to the survey-derived turnover levels, with inflow). Average productivity growth rates from Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 22, are then used to project the available benchmark expenditure.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2.

STEP 4: The Surplus Expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement. Average sales density is assumed to be £3,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved. The sales density for respective years is "grown" using Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 22.

STEP 5: The Surplus Expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement. Average sales density is assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved. The sales density for respective years is "grown" using Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 22.

Capacity Findings - Coleraine

**Table 18a-b: Comparison goods market share derived turnover (based on household survey results)**

	% Market Share	2025 Survey Turnover (£m)	2028 Survey Turnover (£m)	2031 Survey Turnover (£m)	2034 Survey Turnover (£m)	2038 Survey Turnover (£m)
Expenditure in the Study Area (£m)		£1,174.6	£1,225.0	£1,301.4	£1,374.0	£1,464.4
Expenditure directed to Coleraine	20.8%	£244.0	£254.5	£270.3	£285.4	£304.2

**Notes:**

a. Market Share percentage figures are derived from Table 17a. This is then applied to the total comparison goods expenditure available (excluding SFT) as taken from Table 8b

**Table 18b-b: Comparison goods market share derived turnover, and assumed inflow from outside of the Study Area (£m)**

	Estimated 'Inflow' from Outside Study Area	2025 Survey Turnover (£m)	2028 Survey Turnover (£m)	2031 Survey Turnover (£m)	2034 Survey Turnover (£m)	2038 Survey Turnover (£m)
Expenditure directed to Coleraine	5.0%	£256.2	£267.2	£283.9	£299.7	£319.4

**Notes:**

a. The inflow percentages have been estimated by Nexus. The inflow figures are then applied to the survey turnover as presented in Table 18a

**Table 19a-b: Comparison Goods Capacity Assessment**

Assume Equilibrium at Base Year and Constant Market Shares

	2025	2028	2031	2034	2038
STEP 1: Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£256.2	£267.2	£283.9	£299.7	£319.4
STEP 2: Total Forecast "Benchmark" Turnover of all Floorspace (£m)	£256.2	£272.4	£291.6	£312.2	£341.9
STEP 3: Available Expenditure before commitments (£m)		-£5.2	-£7.8	-£12.5	-£22.5
STEP 4: Turnover of all committed Floorspace (£m)		£0.0	£0.0	£0.0	£0.0
STEP 5: Surplus Expenditure (£m)		-£5.2	-£7.8	-£12.5	-£22.5
STEP 6: <b>MAXIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:</b>					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£3,500	£3,721	£3,984	£4,265	£4,672
(ii) <b>MAXIMUM "Net" Floorspace Capacity (sq m):</b>		-1,400	-2,000	-2,900	-4,800
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-2,000	-2,857	-4,143	-6,857
STEP 7: <b>MINIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:</b>					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,848	£6,261	£6,703	£7,341
(ii) <b>MINIMUM "Net" Floorspace Capacity (sq m):</b>		.900	-1,100	-1,900	-3,100
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-1,286	-1,714	-2,714	-4,429

**Notes:**

STEP 1: Survey Derived (with Inflow) turnovers assume constant market shares over the forecast period, derived from Table 18b.

STEP 2: Assumption is made that comparison retail market is in 'equilibrium' at the base year (i.e. 2025, 'benchmark' turnovers are equivalent to the survey-derived turnover levels, with inflow). Average productivity growth rates from Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 22, are then used to project the available benchmark expenditure.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2.

STEP 4: The Surplus Expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement. Average sales density is assumed to be £3,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved. The sales density for respective years is "grown" using Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 22.

STEP 5: The Surplus Expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement. Average sales density is assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved. The sales density for respective years is "grown" using Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 22.

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Capacity Findings - Limavady

**Table 18a-c: Comparison goods market share derived turnover (based on household survey results)**

	% Market Share	2025 Survey Turnover (£m)	2028 Survey Turnover (£m)	2031 Survey Turnover (£m)	2034 Survey Turnover (£m)	2038 Survey Turnover (£m)
Expenditure in the Study Area (£m)		£1,174.6	£1,225.0	£1,301.4	£1,374.0	£1,464.4
Expenditure directed to Limavady	5.6%	£65.6	£68.4	£72.6	£76.7	£81.7

**Notes:**

a. Market Share percentage figures are derived from Table 17a. This is then applied to the total comparison goods expenditure available (excluding SFT) as taken from Table 8b

**Table 18b-c: Comparison goods market share derived turnover, and assumed inflow from outside of the Study Area (£m)**

	Estimated 'Inflow' from Outside Study Area	2025 Survey Turnover (£m)	2028 Survey Turnover (£m)	2031 Survey Turnover (£m)	2034 Survey Turnover (£m)	2038 Survey Turnover (£m)
Expenditure directed to Limavady	£0.0	£65.6	£68.4	£72.6	£76.7	£81.7

**Notes:**

a. The inflow percentages have been estimated by Nexus. The inflow figures are then applied to the survey turnover as presented in Table 18a

**Table 18c-c: Extant comparison goods commitments**

Site Address	Application Reference	Summary of the Proposal	Net* Convenience Floorspace (sqm)	Estimated Sales Density (£ per sq m) at 2025	Estimated Convenience Turnover (£ m) - 2025	Estimated Convenience Turnover (£ m) - 2028	Estimated Convenience Turnover (£ m) - 2031	Estimated Convenience Turnover (£ m) - 2034	Estimated Convenience Turnover (£ m) - 2038
Limavady Town Centre 23-29 Catherine Street	LA01/2022/0470/F AC 19/02/2024	Proposed Demolition of Existing Licensed Premises and Construction of New Two Storey Retail Unit. (Assumed Comparison, not indicated on application form.) Net increase of 240 sqm comparison floorspace.	240	£4,800	£1.2	£1.2	£1.3	£1.4	£1.5
Limavady			240		£1.2	£1.2	£1.3	£1.4	£1.5

**Notes:**

a. The list of commitments and the associated net sales areas have been provided by the Council.

b. Sales density is assumed to be £4,800 based on Nexus Planning judgement.

c. The turnover for respective years is "grown" using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 22.

**Causeway Coast & Glens Retail Capacity Assessment**

Nexus Planning

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**Table 19a-c: Comparison Goods Capacity Assessment**

Assume Equilibrium at Base Year and Constant Market Shares

		2025	2028	2031	2034	2038
STEP 1:	Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£65.6	£68.4	£72.6	£76.7	£81.7
STEP 2:	Total Forecast "Benchmark" Turnover of all Floorspace (£m)	£65.6	£69.7	£74.6	£79.9	£87.5
STEP 3:	Available Expenditure before commitments (£m)		-£1.3	-£2.0	-£3.2	-£5.8
STEP 4:	Turnover of all committed floorspace (£m)		£1.2	£1.3	£1.4	£1.5
STEP 5:	Surplus Expenditure (£m)		-£2.6	-£3.3	-£4.6	-£7.3
STEP 6:	<b>MAXIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:</b>					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£3,500	£3,721	£3,984	£4,265	£4,672
	(ii) <b>MAXIMUM "Net" Floorspace Capacity (sq m):</b>		-700	-800	-1,100	-1,600
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-1,000	-1,143	-1,571	-2,286
STEP 7:	<b>MINIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:</b>					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,848	£6,261	£6,703	£7,341
	(ii) <b>MINIMUM "Net" Floorspace Capacity (sq m):</b>		-400	-500	-700	-1,000
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-571	-714	-1,000	-1,429

**Notes:**

STEP 1: Survey Derived (with Inflow) turnovers assume constant market shares over the forecast period, derived from Table 18b.

STEP 2: Assumption is made that comparison retail market is in 'equilibrium' at the base year (i.e. 2025, 'benchmark' turnovers are equivalent to the survey-derived turnover levels, with inflow). Average productivity growth rates from Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 22, are then used to project the available benchmark expenditure.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2.

STEP 4: The Surplus Expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement. Average sales density is assumed to be £3,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved. The sales density for respective years is "grown" using Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 22.

STEP 5: The Surplus Expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement. Average sales density is assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved. The sales density for respective years is "grown" using Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 22.

Capacity Findings - Portrush

Table 18a-d: Comparison goods market share derived turnover (based on household survey results)

	% Market Share	2025 Survey Turnover (£m)	2028 Survey Turnover (£m)	2031 Survey Turnover (£m)	2034 Survey Turnover (£m)	2038 Survey Turnover (£m)
Expenditure in the Study Area (£m)		£1,174.6	£1,225.0	£1,301.4	£1,374.0	£1,464.4
Expenditure directed to Portrush	0.5%	£5.7	£6.0	£6.4	£6.7	£7.2

Notes:

a. Market Share percentage figures are derived from Table 17a. This is then applied to the total comparison goods expenditure available (excluding SFT) as taken from Table 8b

Table 18b-d: Comparison goods market share derived turnover, and assumed inflow from outside of the Study Area (£m)

	Estimated 'Inflow' from Outside Study Area	2025 Survey Turnover (£m)	2028 Survey Turnover (£m)	2031 Survey Turnover (£m)	2034 Survey Turnover (£m)	2038 Survey Turnover (£m)
Expenditure directed to Portrush	10.0%	£6.3	£6.6	£7.0	£7.4	£7.9

Notes:

a. The inflow percentages have been estimated by Nexus. The inflow figures are then applied to the survey turnover as presented in Table 18a

Table 19a-d: Comparison Goods Capacity Assessment

Assume Equilibrium at Base Year and Constant Market Shares

		2025	2028	2031	2034	2038
STEP 1:	Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£6.3	£6.6	£7.0	£7.4	£7.9
STEP 2:	Total Forecast "Benchmark" Turnover of all Floorspace (£m)	£6.3	£6.7	£7.2	£7.7	£8.4
STEP 3:	Available Expenditure before commitments (£m)		-£0.1	-£0.2	-£0.3	-£0.6
STEP 4:	Turnover of all committed Floorspace (£m)		£0.0	£0.0	£0.0	£0.0
STEP 5:	Surplus Expenditure (£m)		-£0.1	-£0.2	-£0.3	-£0.6
STEP 6:	<b>MAXIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:</b>					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£3,500	£3,721	£3,984	£4,265	£4,672
	(ii) <b>MAXIMUM "Net" Floorspace Capacity (sq m):</b>		0	0	-100	-100
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		0	0	-143	-143
STEP 7:	<b>MINIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:</b>					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,848	£6,261	£6,703	£7,341
	(ii) <b>MINIMUM "Net" Floorspace Capacity (sq m):</b>		0	0	0	-100
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		0	0	0	-143

Notes

STEP 1: Survey Derived (with Inflow) turnovers assume constant market shares over the forecast period, derived from Table 18b.

STEP 2: Assumption is made that comparison retail market is in 'equilibrium' at the base year (i.e. 2025, 'benchmark' turnovers are equivalent to the survey-derived turnover levels, with inflow). Average productivity growth rates from Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 22, are then used to project the available benchmark expenditure.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2.

STEP 4: The Surplus Expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement. Average sales density is assumed to be £3,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved. The sales density for respective years is "grown" using Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 22

STEP 5: The Surplus Expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement. Average sales density is assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved. The sales density for respective years is "grown" using Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 22.

Capacity Findings - Portstewart

Table 18a-e: Comparison goods market share derived turnover (based on household survey results)

	% Market Share	2025 Survey Turnover (£m)	2028 Survey Turnover (£m)	2031 Survey Turnover (£m)	2034 Survey Turnover (£m)	2038 Survey Turnover (£m)
Expenditure in the Study Area (£m)		£1,174.6	£1,225.0	£1,301.4	£1,374.0	£1,464.4
Expenditure directed to Portstewart	0.9%	£10.4	£10.9	£11.6	£12.2	£13.0

Notes:

a. Market Share percentage figures are derived from Table 17a. This is then applied to the total comparison goods expenditure available (excluding SFT) as taken from Table 8b

Table 18b-e: Comparison goods market share derived turnover, and assumed inflow from outside of the Study Area (£m)

	Estimated 'Inflow' from Outside Study Area	2025 Survey Turnover (£m)	2028 Survey Turnover (£m)	2031 Survey Turnover (£m)	2034 Survey Turnover (£m)	2038 Survey Turnover (£m)
Expenditure directed to Portstewart	10.0%	£11.5	£12.0	£12.7	£13.4	£14.3

Notes:

a. The inflow percentages have been estimated by Nexus. The inflow figures are then applied to the survey turnover as presented in Table 18a

Table 19a-e: Comparison Goods Capacity Assessment

Assume Equilibrium at Base Year and Constant Market Shares

	2025	2028	2031	2034	2038
STEP 1: Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£11.5	£12.0	£12.7	£13.4	£14.3
STEP 2: Total Forecast "Benchmark" Turnover of all Floorspace (£m)	£11.5	£12.2	£13.1	£14.0	£15.3
STEP 3: Available Expenditure before commitments (£m)	-£0.2	-£0.3	-£0.6	-£1.0	
STEP 4: Turnover of all committed Floorspace (£m)		£0.0	£0.0	£0.0	£0.0
STEP 5: Surplus Expenditure (£m)	-£0.2	-£0.3	-£0.6	-£1.0	
STEP 6: MAXIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£3,500	£3,721	£3,984	£4,265	£4,672
(ii) MAXIMUM "Net" Floorspace Capacity (sq m):		-100	-100	-100	-200
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-143	-143	-143	-286
STEP 7: MINIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,848	£6,261	£6,703	£7,341
(ii) MINIMUM "Net" Floorspace Capacity (sq m):		0	-100	-100	-100
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		0	-143	-143	-143

Notes

STEP 1: Survey Derived (with Inflow) turnovers assume constant market shares over the forecast period, derived from Table 18b.

STEP 2: Assumption is made that comparison retail market is in 'equilibrium' at the base year (i.e. 2025, 'benchmark' turnovers are equivalent to the survey-derived turnover levels, with inflow). Average productivity growth rates from Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 22, are then used to project the available benchmark expenditure.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2.

STEP 4: The Surplus Expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement. Average sales density is assumed to be £3,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved. The sales density for respective years is "grown" using Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 22

STEP 5: The Surplus Expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement. Average sales density is assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved. The sales density for respective years is "grown" using Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 22.

Capacity Findings - Ballycastle

Table 18a-f: Comparison goods market share derived turnover (based on household survey results)

	% Market Share	2025 Survey Turnover (£m)	2028 Survey Turnover (£m)	2031 Survey Turnover (£m)	2034 Survey Turnover (£m)	2038 Survey Turnover (£m)
Expenditure in the Study Area (£m)		£1,174.6	£1,225.0	£1,301.4	£1,374.0	£1,464.4
Expenditure directed to Ballycastle	0.6%	£6.5	£6.8	£7.2	£7.6	£8.1

Notes:

a. Market Share percentage figures are derived from Table 17a. This is then applied to the total comparison goods expenditure available (excluding SFT) as taken from Table 8b

Table 18b-f: Comparison goods market share derived turnover, and assumed inflow from outside of the Study Area (£m)

	Estimated 'Inflow' from Outside Study Area	2025 Survey Turnover (£m)	2028 Survey Turnover (£m)	2031 Survey Turnover (£m)	2034 Survey Turnover (£m)	2038 Survey Turnover (£m)
Expenditure directed to Ballycastle	10.0%	£6.6	£6.9	£7.3	£7.7	£8.2

Notes:

a. The inflow percentages have been estimated by Nexus. The inflow figures are then applied to the survey turnover as presented in Table 18a

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Table 19a-f: Comparison Goods Capacity Assessment

Assume Equilibrium at Base Year and Constant Market Shares

		2025	2028	2031	2034	2038
STEP 1:	Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£6.6	£6.9	£7.3	£7.7	£8.2
STEP 2:	Total Forecast "Benchmark" Turnover of all Floorspace (£m)	£6.6	£7.1	£7.6	£8.1	£8.9
STEP 3:	Available Expenditure before commitments (£m)		-£0.1	-£0.2	-£0.3	-£0.6
STEP 4:	Turnover of all committed Floorspace (£m)		£0.0	£0.0	£0.0	£0.0
STEP 5:	<b>Surplus Expenditure (£m)</b>		-£0.1	-£0.2	-£0.3	-£0.6
STEP 6:	<b>MAXIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:</b>					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£3,500	£3,721	£3,984	£4,265	£4,672
	(ii) <b>MAXIMUM "Net" Floorspace Capacity (sq m):</b>		0	-100	-100	-100
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		0	-143	-143	-143
STEP 7:	<b>MINIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:</b>					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,848	£6,261	£6,703	£7,341
	(ii) <b>MINIMUM "Net" Floorspace Capacity (sq m):</b>		0	0	-100	-100
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		0	0	-143	-143

Notes

STEP 1: Survey Derived (with Inflow) turnovers assume constant market shares over the forecast period, derived from Table 18b.

STEP 2: Assumption is made that comparison retail market is in 'equilibrium' at the base year (i.e. 2025, 'benchmark' turnovers are equivalent to the survey-derived turnover levels, with inflow). Average productivity growth rates from Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 22, are then used to project the available benchmark expenditure.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2.

STEP 4: The Surplus Expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement. Average sales density is assumed to be £3,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved. The sales density for respective years is "grown" using Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 22

STEP 5: The Surplus Expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement. Average sales density is assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved. The sales density for respective years is "grown" using Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 22.

Capacity Findings - Ballymoney

Table 18a-g: Comparison goods market share derived turnover (based on household survey results)

	% Market Share	2025 Survey Turnover (£m)	2028 Survey Turnover (£m)	2031 Survey Turnover (£m)	2034 Survey Turnover (£m)	2038 Survey Turnover (£m)
Expenditure in the Study Area (£m)		£1,174.6	£1,225.0	£1,301.4	£1,374.0	£1,464.4
Expenditure directed to Ballymoney	5.9%	£68.8	£71.8	£76.3	£80.5	£85.8

Notes:

a. Market Share percentage figures are derived from Table 17a. This is then applied to the total comparison goods expenditure available (excluding SFT) as taken from Table 8b

Table 18b-g: Comparison goods market share derived turnover, and assumed inflow from outside of the Study Area (£m)

	Estimated 'Inflow' from Outside Study Area	2025 Survey Turnover (£m)	2028 Survey Turnover (£m)	2031 Survey Turnover (£m)	2034 Survey Turnover (£m)	2038 Survey Turnover (£m)
Expenditure directed to Ballymoney	0.0%	£68.8	£71.8	£76.3	£80.5	£85.8

Notes:

a. The inflow percentages have been estimated by Nexus. The inflow figures are then applied to the survey turnover as presented in Table 18a

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Table 19a-g: Comparison Goods Capacity Assessment

Assume Equilibrium at Base Year and Constant Market Shares

		2025	2028	2031	2034	2038
STEP 1:	Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£68.8	£71.8	£76.3	£80.5	£85.8
STEP 2:	Total Forecast "Benchmark" Turnover of all Floorspace (£m)	£68.8	£73.2	£78.4	£83.9	£91.9
STEP 3:	Available Expenditure before commitments (£m)		-£1.4	-£2.1	-£3.4	-£6.1
STEP 4:	Turnover of all committed Floorspace (£m)		£0.0	£0.0	£0.0	£0.0
STEP 5:	Surplus Expenditure (£m)		-£1.4	-£2.1	-£3.4	-£6.1
STEP 6:	<b>MAXIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:</b>					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£3,500	£3,721	£3,984	£4,265	£4,672
	(ii) <b>MAXIMUM "Net" Floorspace Capacity (sq m):</b>		-400	-500	-800	-1,300
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-571	-714	-1,143	-1,857
STEP 7:	<b>MINIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:</b>					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,848	£6,261	£6,703	£7,341
	(ii) <b>MINIMUM "Net" Floorspace Capacity (sq m):</b>		-200	-300	-500	-800
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-286	-429	-714	-1,143

Notes

STEP 1: Survey Derived (with Inflow) turnovers assume constant market shares over the forecast period, derived from Table 18b.

STEP 2: Assumption is made that comparison retail market is in 'equilibrium' at the base year (i.e. 2025, 'benchmark' turnovers are equivalent to the survey-derived turnover levels, with inflow). Average productivity growth rates from Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 22, are then used to project the available benchmark expenditure.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2.

STEP 4: The Surplus Expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement. Average sales density is assumed to be £3,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved. The sales density for respective years is "grown" using Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 22

STEP 5: The Surplus Expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement. Average sales density is assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved. The sales density for respective years is "grown" using Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 22.

Capacity Findings - Rest of Causeway Coast & Glens

Table 18a-h: Comparison goods market share derived turnover (based on household survey results)

	% Market Share	2025 Survey Turnover (£m)	2028 Survey Turnover (£m)	2031 Survey Turnover (£m)	2034 Survey Turnover (£m)	2038 Survey Turnover (£m)
Expenditure in the Study Area (£m)		£1,174.6	£1,225.0	£1,301.4	£1,374.0	£1,464.4
Expenditure directed to Rest of CCG	1.7%	£20.3	£21.2	£22.5	£23.7	£25.3

Notes:

a. Market Share percentage figures are derived from Table 17a. This is then applied to the total comparison goods expenditure available (excluding SFT) as taken from Table 8b

Table 18b-h: Comparison goods market share derived turnover, and assumed inflow from outside of the Study Area (£m)

	Estimated 'Inflow' from Outside Study Area	2025 Survey Turnover (£m)	2028 Survey Turnover (£m)	2031 Survey Turnover (£m)	2034 Survey Turnover (£m)	2038 Survey Turnover (£m)
Expenditure directed to Rest of CCG	0.0%	£20.3	£21.2	£22.5	£23.7	£25.3

Notes:

a. The inflow percentages have been estimated by Nexus. The inflow figures are then applied to the survey turnover as presented in Table 18a

Table 19a-h: Comparison Goods Capacity Assessment

Assume Equilibrium at Base Year and Constant Market Shares

	2025	2028	2031	2034	2038
STEP 1: Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£20.3	£21.2	£22.5	£23.7	£25.3
STEP 2: Total Forecast "Benchmark" Turnover of all Floorspace (£m)	£20.3	£21.6	£23.1	£24.7	£27.1
STEP 3: Available Expenditure before commitments (£m)	-£0.4	-£0.6	-£1.0	-£1.8	
STEP 4: Turnover of all committed Floorspace (£m)		£0.0	£0.0	£0.0	£0.0
STEP 5: Surplus Expenditure (£m)	-£0.4	-£0.6	-£1.0	-£1.8	
STEP 6: MAXIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£3,500	£3,721	£3,984	£4,265	£4,672
(ii) MAXIMUM "Net" Floorspace Capacity (sq m):		-100	-200	-200	-400
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-143	-286	-286	-571
STEP 7: MINIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,848	£6,261	£6,703	£7,341
(ii) MINIMUM "Net" Floorspace Capacity (sq m):		-100	-100	-100	-200
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-143	-143	-143	-286

Notes

STEP 1: Survey Derived (with Inflow) turnovers assume constant market shares over the forecast period, derived from Table 18b.

STEP 2: Assumption is made that comparison retail market is in 'equilibrium' at the base year (i.e. 2025, 'benchmark' turnovers are equivalent to the survey-derived turnover levels, with inflow). Average productivity growth rates from Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 22, are then used to project the available benchmark expenditure.

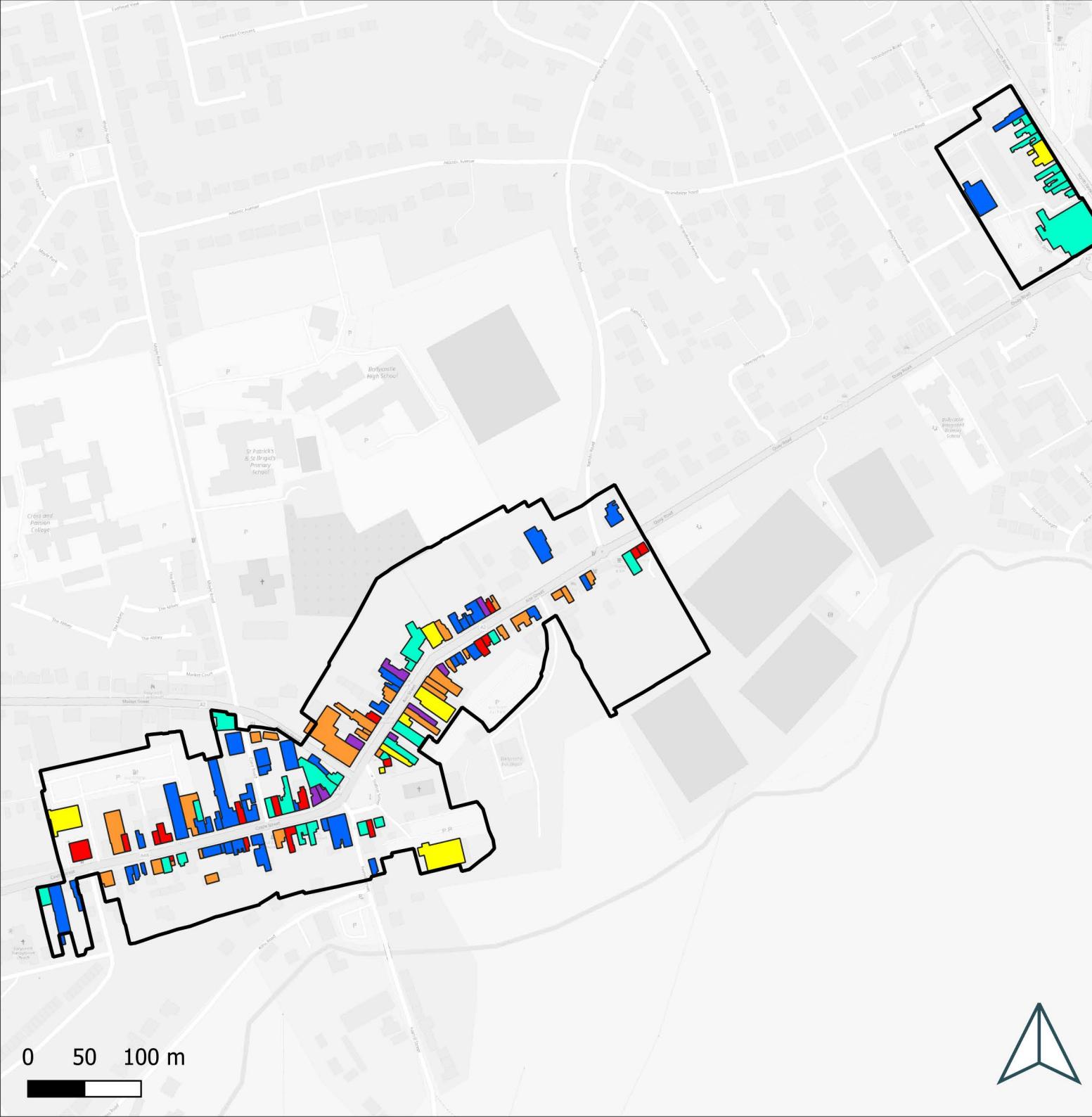
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2.

STEP 4: The Surplus Expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement. Average sales density is assumed to be £3,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved. The sales density for respective years is "grown" using Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 22

STEP 5: The Surplus Expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement. Average sales density is assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved. The sales density for respective years is "grown" using Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 22.

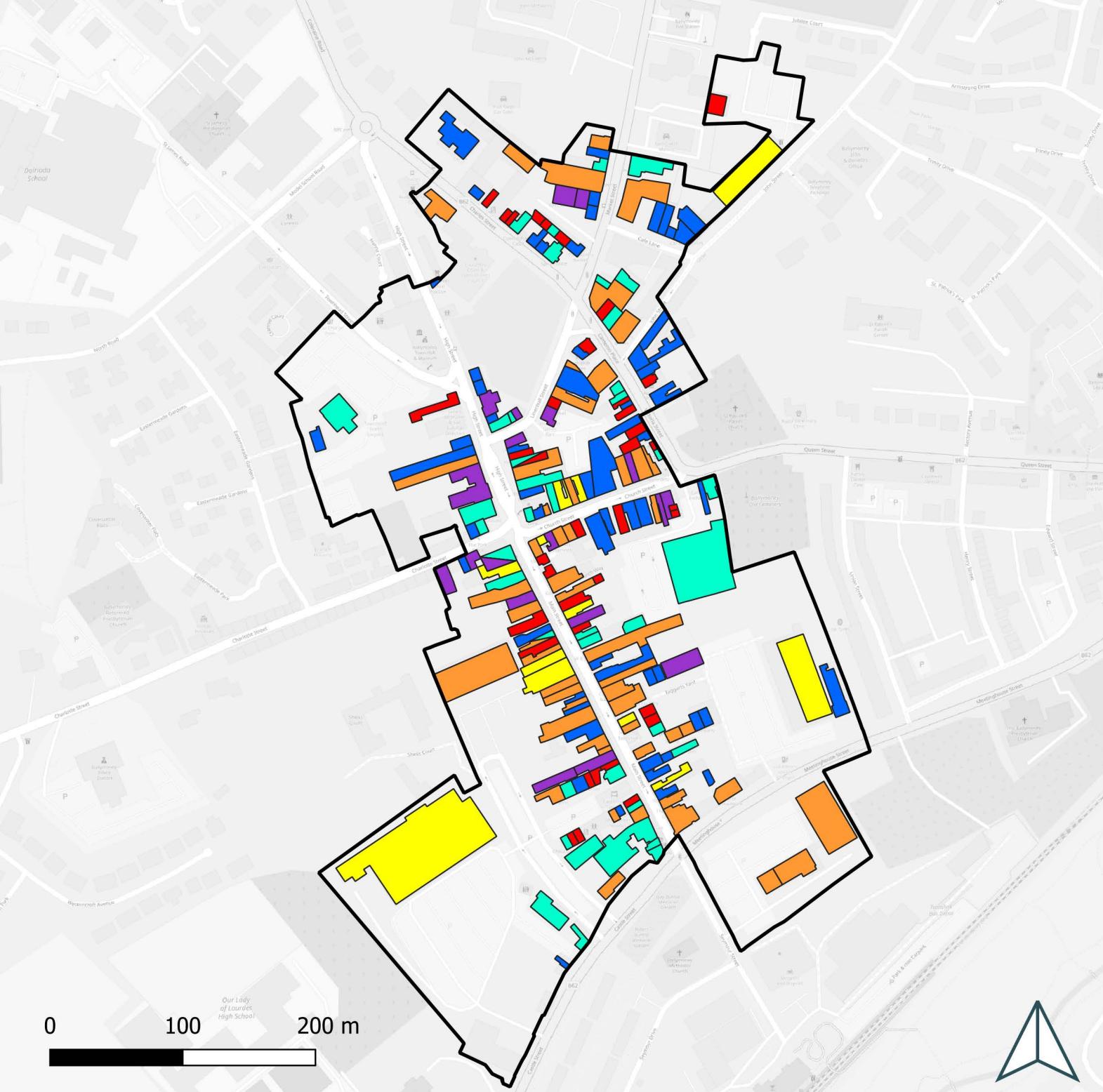
## Appendix D – Centre Composition Plan

## Ballycastle Town Centre Composition

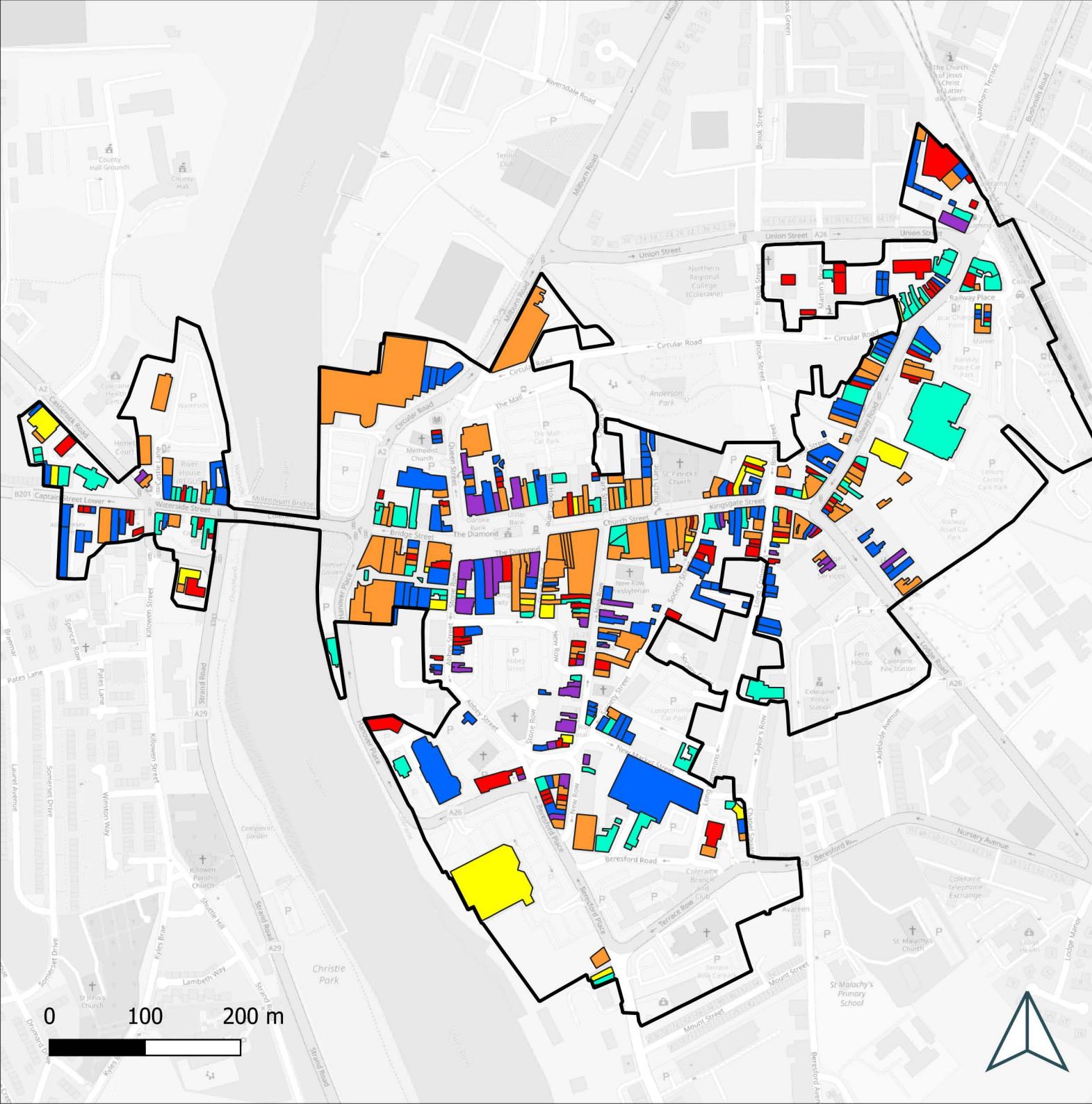


# Ballymoney Town Centre Composition

-  Comparison
  -  Convenience
  -  Financial & Business Service
  -  Leisure Service
  -  Retail Service
  -  Vacant
  -  Ballymoney Town Centre Boundary

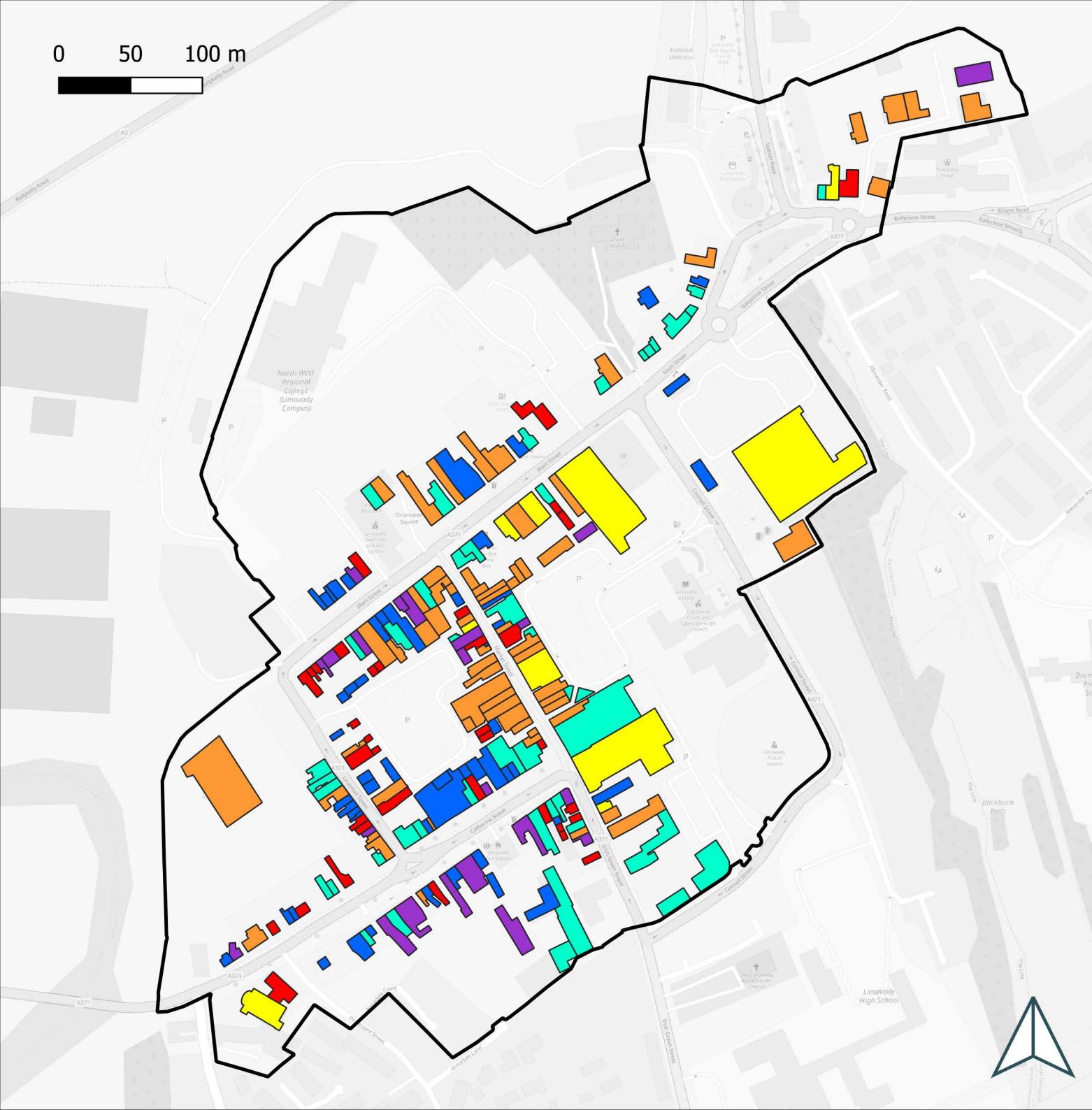


# Coleraine Town Centre



- Comparison
- Convenience
- Financial & Business Service
- Leisure Service
- Retail Service
- Vacant
- Coleraine Town Centre Boundary

0 50 100 m



**NEXXUS**  
PLANNING

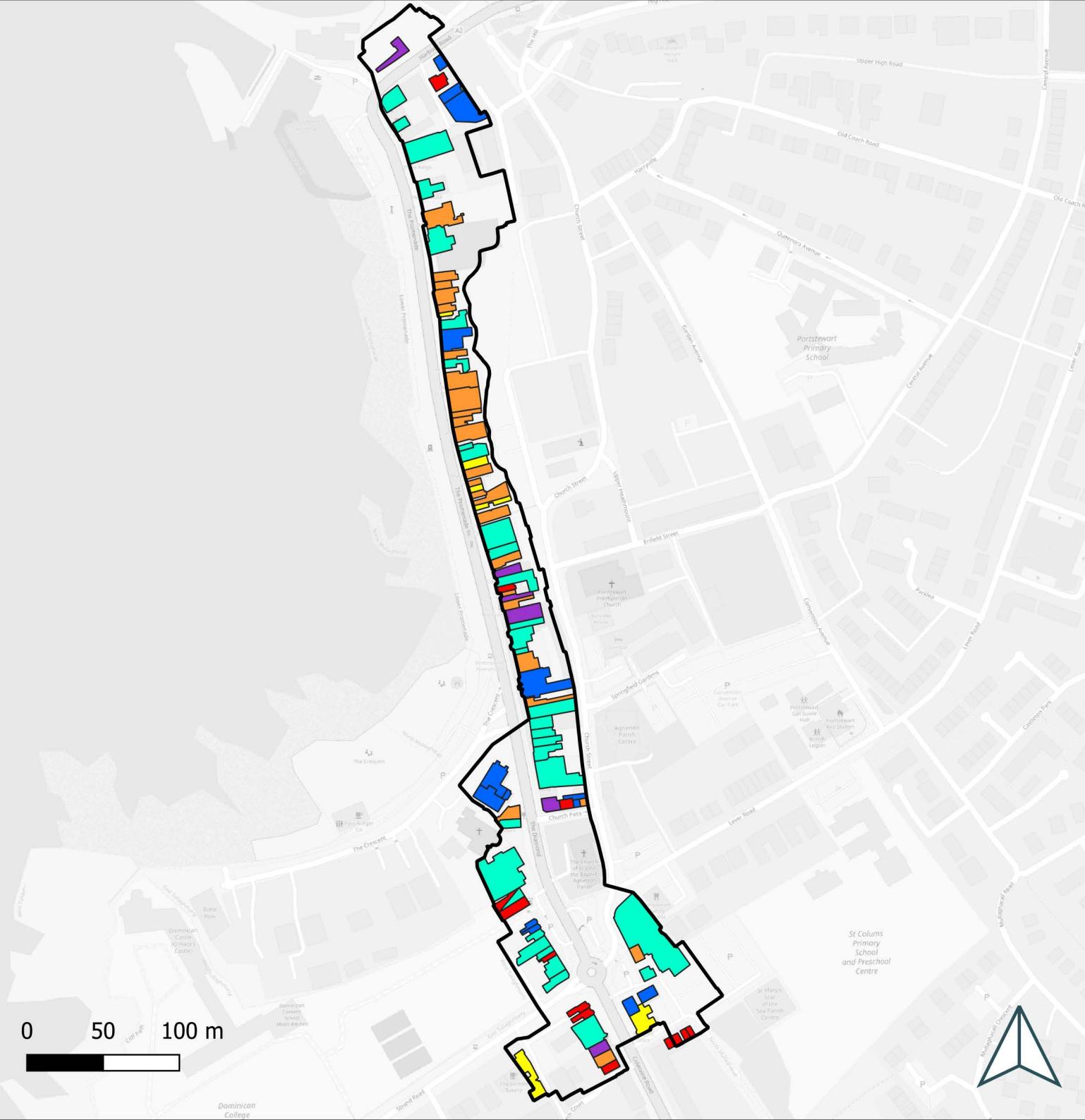
## Limavady Town Centre Composition

- Comparison
- Convenience
- Financial & Business Service
- Leisure Service
- Retail Service
- Vacant
- Limavady Town Centre Boundary

## Portrush Town Centre Composition



# Portstewart Town Centre Composition



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**Nexus Planning**  
London  
Holmes House  
4 Pear Place  
London SE1 8BT

[nexusplanning.co.uk](http://nexusplanning.co.uk)