APPENDICES

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APPENDIX A: GVA GRIMLEY & GL HEARN REPORTS

Antrim Ballymena & Larne Retail Commercial Leisure Development Study (GVA Grimley 2009/2010) was commissioned by the Department in preparation for the Antrim Ballymena & Larne 2016 Draft Area Plan. The research was taken from various sources between 2005 and 2009. The study provided a composite picture of retail and commercial leisure provision within Ballymena and Larne towns (as well as Antrim town), identifying potential requirements for new floor space in the period up to 2016. Terms of References were:

- to understand expenditure patterns through shopper surveys.
- to understand future quantitative capacity for new retail and commercial leisure floor space.
- to undertake health checks and appraise town centre performance against benchmarks.
- to provide recommendations in relation to town centre boundaries, primary retail cores, primary retail frontages and town centre opportunity sites.
- to provide strategic advice on future retail need and implications for future retail policies and strategies.

Key Outputs

- Recommendations were given on need to plan for additional convenient, comparison and Bulky Goods and Leisure floor space.
- Six Opportunity Sites were identified as having capacity to be developed and their potential uses recommended.
- A revised town centre boundary, primary retail core and primary retail frontages were recommended and mapped for each town.

Town Centres and Retail Research Project (2013/2014) led by GL Hearn together with RPD consulting and MCE Public Relations was commissioned by the Department in Jan 2013. This paper was asked to report on, among other topics, the current health of designated town centres in Northern Ireland and review existing and committed out-of-centre development.

Key Outputs

A town centre Health Check summary was provided for many Northern Ireland towns including Ballymena Larne and Carrickfergus. Several town centre topics were assessed and although they were not fully detailed vitality and viability assessments, they provided a flavour of the current diversity and performance of each town centre. It was made clear though that town centre composition is only one aspect of vitality and viability and should not be the sole factor in determining the town's health – Other factors such as evening economy are also important tools in assessing the vitality and viability of a town centre.

As each town centre has its own unique mix of multiple outlets, independent shops, convenience and comparison stores, food outlets and vacant premises a GOAD category report was also generated for Ballymena Larne and Carrickfergus towns which helped identify areas that were under or over represented compared to the UK average for similar sized town, in terms of shop type, numbers of units and floor space.
APPENDIX B: BALLYMENA TOWN CENTRE PROFILE

The table below is a summary of data from an Experian GOAD report from October 2012 which compares outlet counts from various sectors to UK averages for similar towns. Where 100% if the UK average, then the figure of 105/100 translates as Ballymena town being marginally above the average for comparison provision than a similar sized UK town. Likewise the figure of 77/100 means Ballymena is almost a quarter less than the average for convenience provision than a similar sized UK town.

Table B1:

<table>
<thead>
<tr>
<th>Ballymena Vs UK average</th>
<th>Comparison</th>
<th>Convenience</th>
<th>Retail Service</th>
<th>Leisure Services</th>
<th>Financial &amp; Business Services</th>
<th>Vacant Outlets</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. of units</td>
<td>178</td>
<td>32</td>
<td>62</td>
<td>70</td>
<td>56</td>
<td>117</td>
</tr>
<tr>
<td>Floorspace</td>
<td>560,500</td>
<td>77,500</td>
<td>82,000</td>
<td>120,000</td>
<td>84,100</td>
<td>234,600</td>
</tr>
<tr>
<td>Ballymena Vs UK average (100)</td>
<td>105/100</td>
<td>77/100</td>
<td>88/100</td>
<td>62/100</td>
<td>99/100</td>
<td>187/100</td>
</tr>
</tbody>
</table>

Table B2:

<table>
<thead>
<tr>
<th>Ballymena Vs UK average</th>
<th>Comparison</th>
<th>Convenience</th>
<th>Retail Services</th>
<th>Leisure Services</th>
<th>Financial &amp; Business Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>More than UK average</td>
<td>Electrical goods, furniture general, Ladieswear, menswear, vehicle accessories, Charity Shops</td>
<td>CTN, health food shops</td>
<td>Photo studio, TV cable &amp; video rental</td>
<td>Bingo &amp; amusements</td>
<td>Financial services, legal services</td>
</tr>
<tr>
<td>Less than UK average</td>
<td>Antique shops, DIY, fitted furniture, music shops, photographic</td>
<td>Fishmongers, markets</td>
<td>Filling stations, post offices</td>
<td>Bars &amp; winebars, Disco, Dance &amp; nightclubs, sports &amp; leisure facilities</td>
<td>Business goods and services</td>
</tr>
</tbody>
</table>
Fig. B1: **Vacancy Rate by Floor area**

- Portadown: 20%
- Lurgan: 19%
- Ballymena: 17%, 17%
- Ballymoney: 15%
- Cookstown: 14%
- Lisburn: 14%
- Larne: 14%, 14%
- Armagh: 14%
- Londonderry: 13%
- Bangor: 13%
- Downpatrick: 13%
- Coleraine: 13%
- Dungannon: 12%
- Omagh: 11%
- Belfast: 10%, 10%
- Carrickfergus: 10%
- UK National Average: 10%
- Newry: 10%
- Newcastle: 8%
- Enniskillen: 8%
- Strabane: 7%
- Banbridge: 6%
- Limavady: 6%
- Craigavon: 0%
**Table B3: Opportunity Sites – Ballymena Area Plan 1986 - 2001**

<table>
<thead>
<tr>
<th>Plan Ref</th>
<th>Location</th>
<th>Plan Proposal</th>
<th>Development Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Fairhill</td>
<td>Retail/commercial</td>
<td>Majority of site is Fairhill Shopping Centre, including anchor stores such as M&amp;S and Debenhams, other retail units and a foodhall. Remainder of the site at Alexander Street is a surface car park.</td>
</tr>
<tr>
<td></td>
<td>Bryan Street</td>
<td>Retail/commercial</td>
<td>Site has been mostly redeveloped including Toals bookmakers, a Public House but there are a number of unoccupied units.</td>
</tr>
<tr>
<td></td>
<td>Larne Road Link/Braidwater</td>
<td>Retail/commercial</td>
<td>Braidwater Retail Park, including Pets at Home, Harveys, Carpet Right, Currys, B&amp;M, Poundstretchers and Dreams.</td>
</tr>
<tr>
<td></td>
<td>High Street</td>
<td>Retail/commercial</td>
<td>Site largely developed as part of Tower Centre complex including Argos, Iceland and a cafe.</td>
</tr>
<tr>
<td></td>
<td>North Street</td>
<td>Retail/commercial</td>
<td>Dominos pizza and Maxol Petrol Filling Station.</td>
</tr>
<tr>
<td></td>
<td>Between Henry Street &amp; Queen</td>
<td>Retail/commercial</td>
<td>Mostly redeveloped including Boots, McCleans Bookmakers, Fast food takeaways, independent retail units and Government offices. A car park still exists within the site.</td>
</tr>
</tbody>
</table>
Map B1:

Ballymena Town Centre
Residential Properties-March 2015

Legend

- Town Centre Boundary
- Residential properties
Map B2: Statutory & Non-Statutory Development Opportunity Sites in Ballymena Town Centre
APPENDIX C: LARNE TOWN CENTRE PROFILE

The table below is a summary of data from an Experian GOAD report from October 2012 which compares outlet counts from various sectors to UK averages for similar towns. If the UK average for a similar town is 100 then the figure of 103/100 translates as Larne town being marginally above the average for comparison provision than a similar sized UK town. Likewise the figure of 97/100 means it is marginally less than the average for convenience provision than a similar sized UK town.

Table C1:

<table>
<thead>
<tr>
<th>Larne</th>
<th>Comparison</th>
<th>Convenience</th>
<th>Retail Service</th>
<th>Leisure Services</th>
<th>Financial &amp; Business Services</th>
<th>Vacant Outlets</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. of units</td>
<td>87</td>
<td>20</td>
<td>35</td>
<td>39</td>
<td>31</td>
<td>45</td>
</tr>
<tr>
<td>Floorspace</td>
<td>236,700</td>
<td>62,600</td>
<td>53,400</td>
<td>67,000</td>
<td>56,700</td>
<td>84,700</td>
</tr>
<tr>
<td>Larne Vs UK average (100)</td>
<td>103/100</td>
<td>97/100</td>
<td>100/100</td>
<td>69/100</td>
<td>110/100</td>
<td>144/100</td>
</tr>
</tbody>
</table>

*These statistics give an overview of the situation in November 2009*

Table C2:

<table>
<thead>
<tr>
<th>Ballymena Vs UK average</th>
<th>Comparison</th>
<th>Convenience</th>
<th>Retail Services</th>
<th>Leisure Services</th>
<th>Financial &amp; Business Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>More than UK average</td>
<td>Carpet and flooring, Charity Shops, Department &amp; variety stores, Charity Shops</td>
<td>Butchers, green grocers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less than UK average</td>
<td>Cycle accessories, musical instruments, garden equipment, photographic equipment</td>
<td>Fishmongers, health foods, markets</td>
<td>Photo processing, vehicle rental, DVD rental</td>
<td>Nightclubs, hotels &amp; guesthouses</td>
<td>Building societies, business goods, employment/ careers</td>
</tr>
</tbody>
</table>

(This list is not exhaustive)
<table>
<thead>
<tr>
<th>Plan Ref</th>
<th>Location</th>
<th>Plan Proposal</th>
<th>Development Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>TC4</td>
<td>The Market Yard (Station Road - Circular Road)</td>
<td>Small commercial units / residential</td>
<td>Mixed use development incorporating offices and community space</td>
</tr>
<tr>
<td>CCS3</td>
<td>Laharna Hotel Site (Main Street/Glenarm Road)</td>
<td>Retail / commercial</td>
<td>Apartment Development / Commercial Units (1 unit occupied) / No.128 - No.132 Main Street Undeveloped</td>
</tr>
<tr>
<td>CCS4</td>
<td>High Street/Pound Street</td>
<td>Retail / commercial</td>
<td>Undeveloped</td>
</tr>
<tr>
<td>CCS4</td>
<td>No. 49-51 Main Street</td>
<td>Retail / commercial</td>
<td>Undeveloped</td>
</tr>
<tr>
<td>CCS4</td>
<td>No. 78-80 Main Street</td>
<td>Retail / commercial</td>
<td>Undeveloped</td>
</tr>
<tr>
<td>CCS4</td>
<td>No. 99-103 Main Street</td>
<td>Retail / commercial</td>
<td>Undeveloped</td>
</tr>
</tbody>
</table>
Map C1:

Larne Town Centre Residential Properties 2015

Legend
- Town Centre Boundary
- Residential properties
Map C2: **Statutory & Non-Statutory Development Opportunity Sites in Larne Town Centre**

APPENDIX D: CARRICKFERGUS TOWN CENTRE PROFILE

If the UK average for a similar town is 100% then the figure of 126/100 translates as Carrickfergus town centre being a quarter above the average for vacant outlets than a similar sized UK town. Likewise the figure of 66/100 means it is third less than the average for comparison provision than a similar sized UK town.

Table D1:

<table>
<thead>
<tr>
<th>Carrickfergus</th>
<th>Comparison</th>
<th>Convenience</th>
<th>Retail Services</th>
<th>Leisure Services</th>
<th>Financial &amp; Business Services</th>
<th>Vacant Outlets</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. of units</td>
<td>54</td>
<td>8</td>
<td>28</td>
<td>27</td>
<td>15</td>
<td>45</td>
</tr>
<tr>
<td>Floorspace</td>
<td>97,000</td>
<td>55,100</td>
<td>28,200</td>
<td>145,100</td>
<td>26,500</td>
<td>51,600</td>
</tr>
<tr>
<td>Carrick Vs UK average (100)</td>
<td>66/100</td>
<td>95/100</td>
<td>96/100</td>
<td>158/100</td>
<td>79/100</td>
<td>126/100</td>
</tr>
</tbody>
</table>

*These statistics give an overview of the retail and town centre offer in October 2012

Table D2:

<table>
<thead>
<tr>
<th>Carrick Vs UK average</th>
<th>Comparison</th>
<th>Convenience</th>
<th>Retail Services</th>
<th>Leisure Services</th>
<th>Financial &amp; Business Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>More than UK average</td>
<td>Charity shops</td>
<td>Childrens wear, footwear</td>
<td>Cinemas, clubs, sports and leisure facilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less than UK average</td>
<td>Furniture general, newsagents, musical instruments, textiles and soft furnishings</td>
<td>Fishmongers, greengrocers off licences, markets, health food shops</td>
<td>Vehicle repairs , vehicle rental</td>
<td>Bars &amp; winebars, Disco, Dance &amp; nightclubs, sports and leisure facilities</td>
<td>Business goods and services, printing and copying</td>
</tr>
</tbody>
</table>
Map D1:

Carrickfergus Town Centre Residential Properties 2015

Legend
- Town Centre Boundary
- Residential properties
Map D2: Carrickfergus Town Centre Boundary
The following steps should be followed when carrying out a retail capacity study. It should be noted that there can be other factors that influence “need” and these can be factored into assessments. Also it should be noted that Capacity Studies, tend to be objective assessments, and do not reflect policy aspirations, hence, there may be a need for additional allowance for policy directions to be allowed for.

1. **Define a catchment area of the settlement being assessed**
   a) The study area needs to be drawn sufficiently wide to enable the interrelationship between facilities within the settlement and neighbouring centres to be properly examined.
   b) To define catchment area it will be necessary to conduct a household survey to establish the existing patterns of shopping behaviours and retailer consumer expenditure flows for the settlement. The surveys should quantify shoppers’ behaviour separately for the main goods categories (main food; top up food, and non bulky food; non bulky goods). This data must be analysed to remove anomalies, where local knowledge would show the survey results to be reliable and potentially incorrect.
   c) Within the catchment area figures for expenditure and turnover should be estimated. Spend and turnover may balance, however, there is often spending flows into and out of a catchment. Inflow of spending can come from alternative sources of spending (e.g. from adjacent districts, from tourists or cross border trading).

2. **Obtain details of Floor space**
   a) Assess the existing retail floorspace in terms of food and non food shopping. This can be obtained from site surveys, planning histories or Goad’s maps. Cross check secondary data sources within on-site inspection.

3. **Calculate the projected expenditure figures over the plan period**
   a) Project retail expenditure figures for food and non food categories.
   b) Incorporate allowances for inflow and outflow of expenditure, as also Special forms of Shopping (SFT) (e.g. internet).

4. **Convert the resulting expenditure figures into floorspace needed applying suitable sales density ratios.**

5. **Convert the need to deduct any existing approved and committed floorspace figures to decide an estimated future requirement.**

6. **Interpret “need” in light of Policy considerations**
   a) If the committed retail development is out of centre, it is necessary to determine whether the assumption is that this will be built out, hence there is no future need, or whether an allowance is going to be provided in town centres to cater for need, irrespective of out of town permissions – so that alternative opportunities are available.
APPENDIX F BIBLIOGRAPHY


DOE - Planning Service (1998) Larne Area Plan 2010


DOE - Planning Service (2014) Belfast Metropolitan Area Plan (BMAP)

DOE (2014) A Strategic Planning Policy Statement for Northern Ireland (draft SPPS) - Public Consultation Draft


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Lisney (2013) Northern Ireland Commercial Property Report

Lisney (2014) Northern Ireland Retail Update