APPENDICES

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: BALLYEMENA 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:

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

Table B2:

Ballymena Vs UK average	Comparison	Convenience	Retail Services	Leisure Services	Financial & Business Services
More than UK average	Electrical goods, furniture general, Ladieswear, menswear, vehicle accessories, Charity Shops	CTN, health food shops	Photo studio, TV cable & video rental	Bingo & amusements	Financial services, legal services
Less than UK average	Antique shops, DIY, fitted furniture, music shops, photographic	Fishmongers, markets	Filling stations, post offices	Bars & winebars, Disco, Dance & nightclubs, sports & leisure facilities	Business goods and services

Fig. B1: **Vacancy Rate by Floor area**

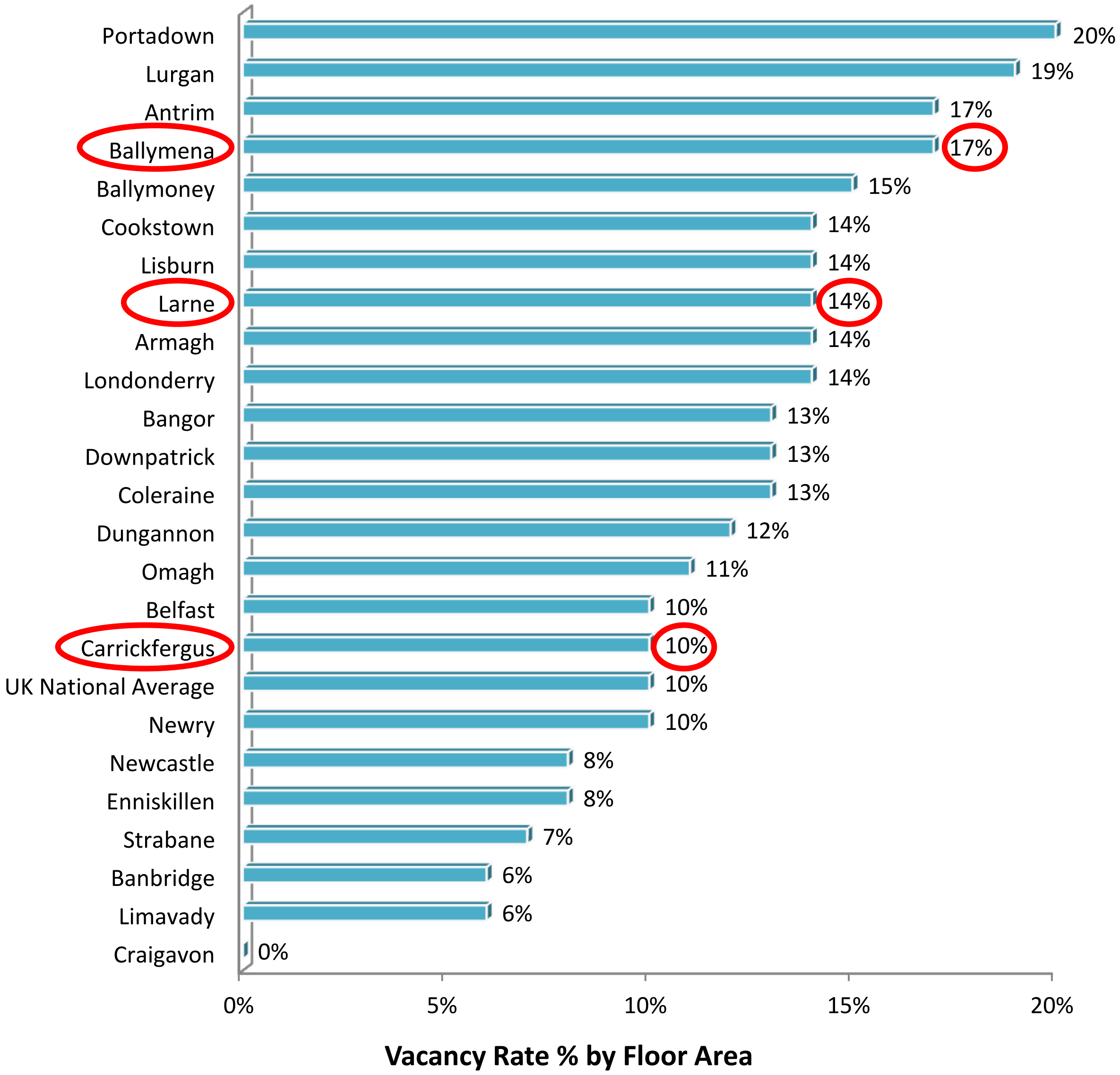
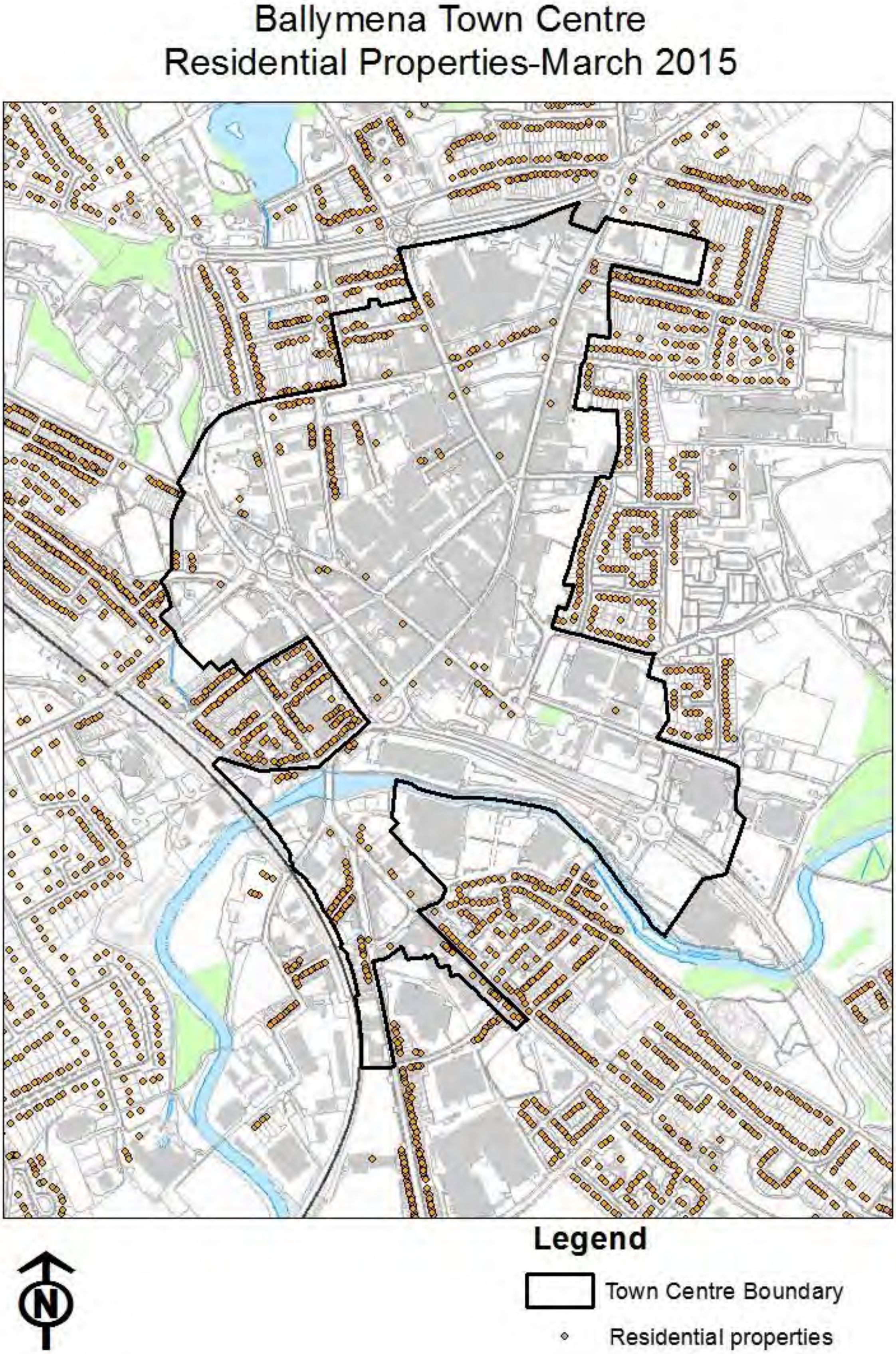


Table B3: **Opportunity Sites – Ballymena Area Plan 1986 - 2001**

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

Map B1:



Ballymena Town Centre
Residential Properties-March 2015
Legend
Town Centre Boundary
Residential properties
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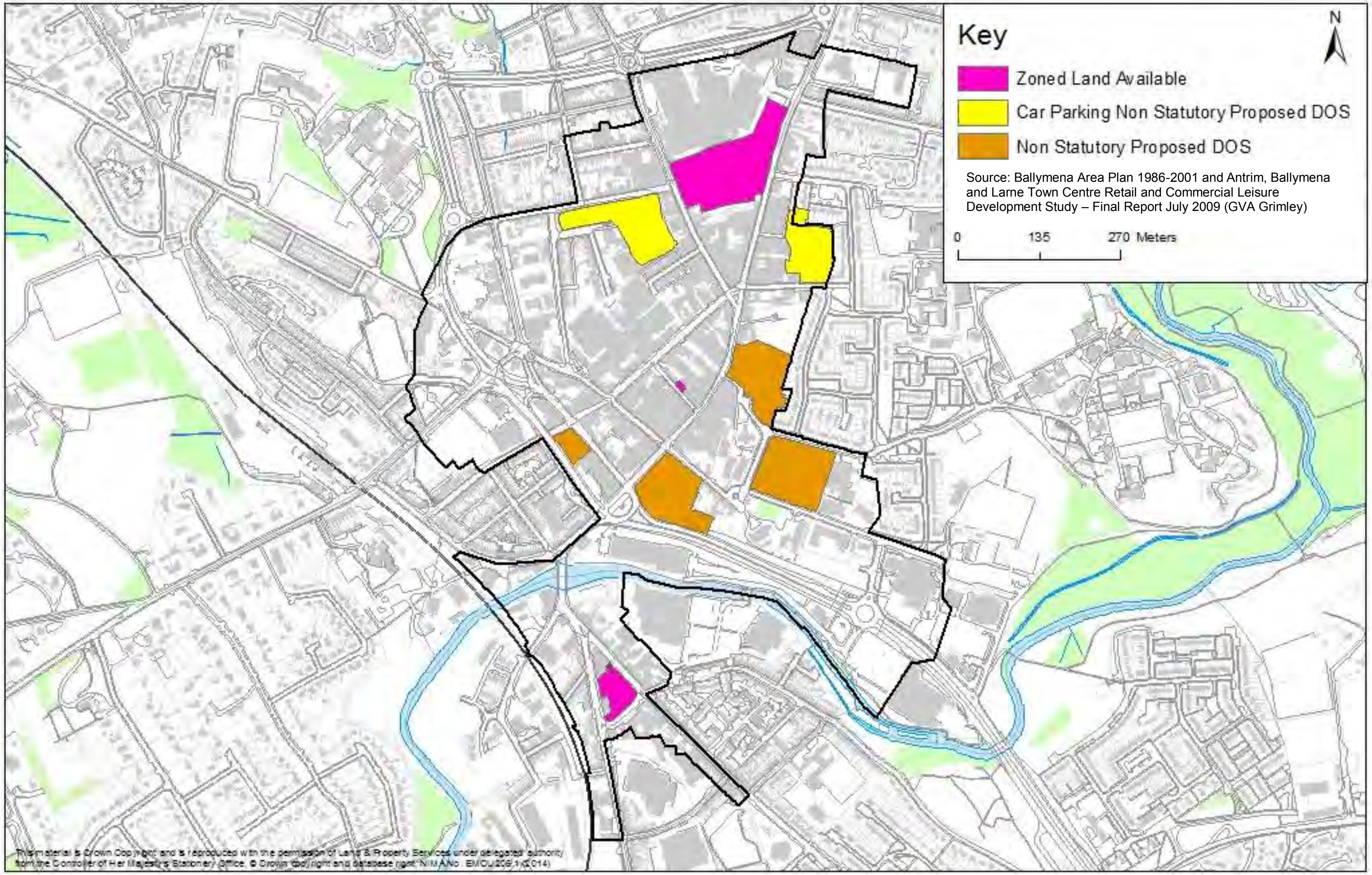
Map B2: **Statutory & Non-Statutory Development Opportunity Sites in Ballymena Town Centre**



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:

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

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

Table C2:

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

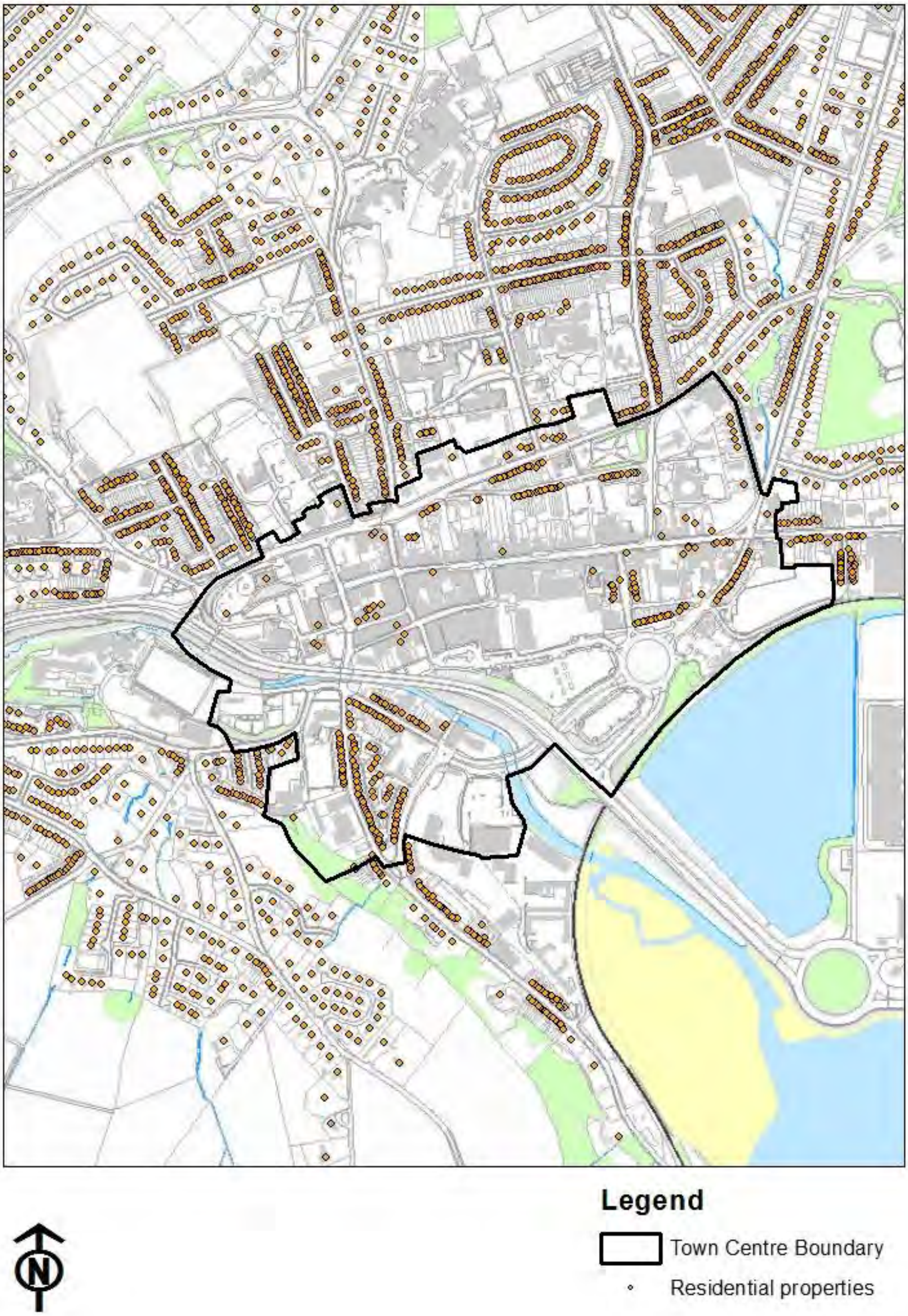
(This list is not exhaustive)

Table C3: **Opportunity Sites – Larne Area Plan 2010**

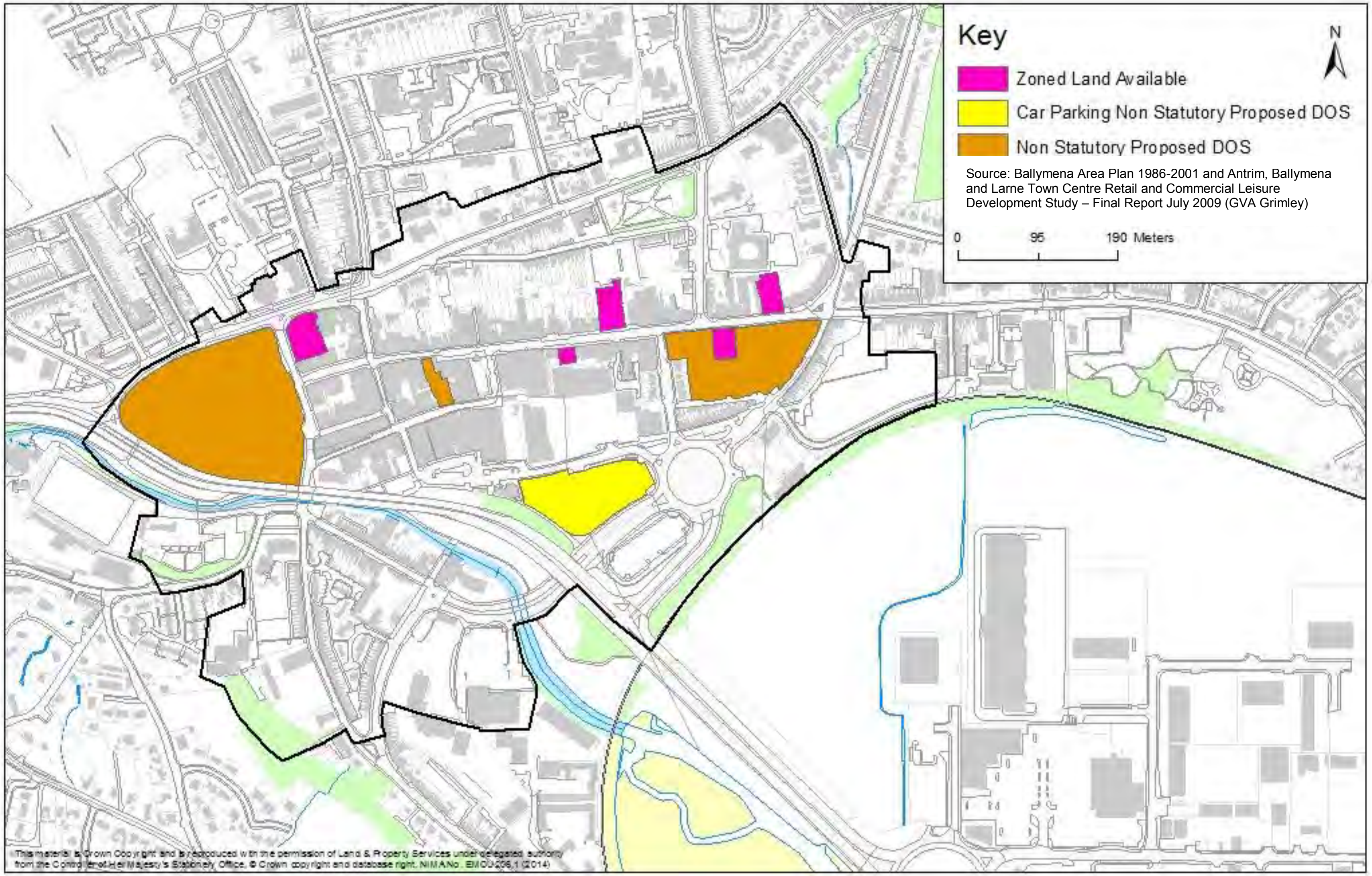
Plan Ref	Location	Plan Proposal	Development Status
TC4	The Market Yard (Station Road - Circular Road)	Small commercial units / residential	Mixed use development incorporating offices and community space
CCS3	Laharna Hotel Site (Main Street/ Glenarm Road)	Retail / commercial	Apartment Development / Commercial Units (1 unit occupied) / No.128 - No.132 Main Street Undeveloped
CCS4	High Street/Pound Street	Retail / commercial	Undeveloped
CCS4	No. 49-51 Main Street	Retail / commercial	Undeveloped
CCS4	No. 78-80 Main Street	Retail / commercial	Undeveloped
CCS4	No. 99-103 Main Street	Retail / commercial	Undeveloped

Map C1:

Larne Town Centre Residential Properties 2015



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:

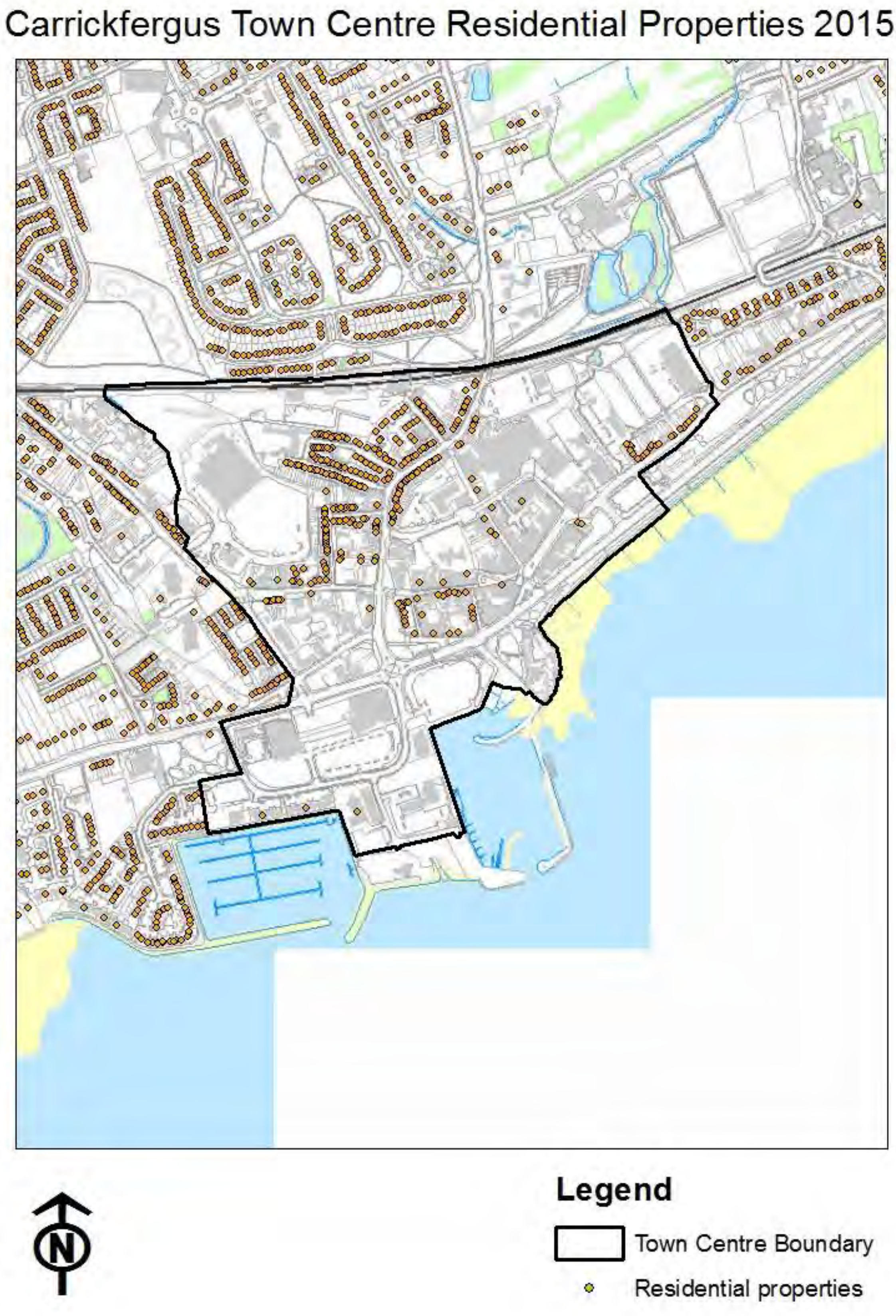
Carrickfergus	Comparison	Convenience	Retail Service	Leisure Services	Financial & Business services	Vacant Outlets
No. of units	54	8	28	27	15	45
Floorspace	97,000	55,100	28,200	145,100	26,500	51,600
Carrick Vs UK average (100)	66/100	95/100	96/100	158/100	79/100	126/100

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

Table D2:

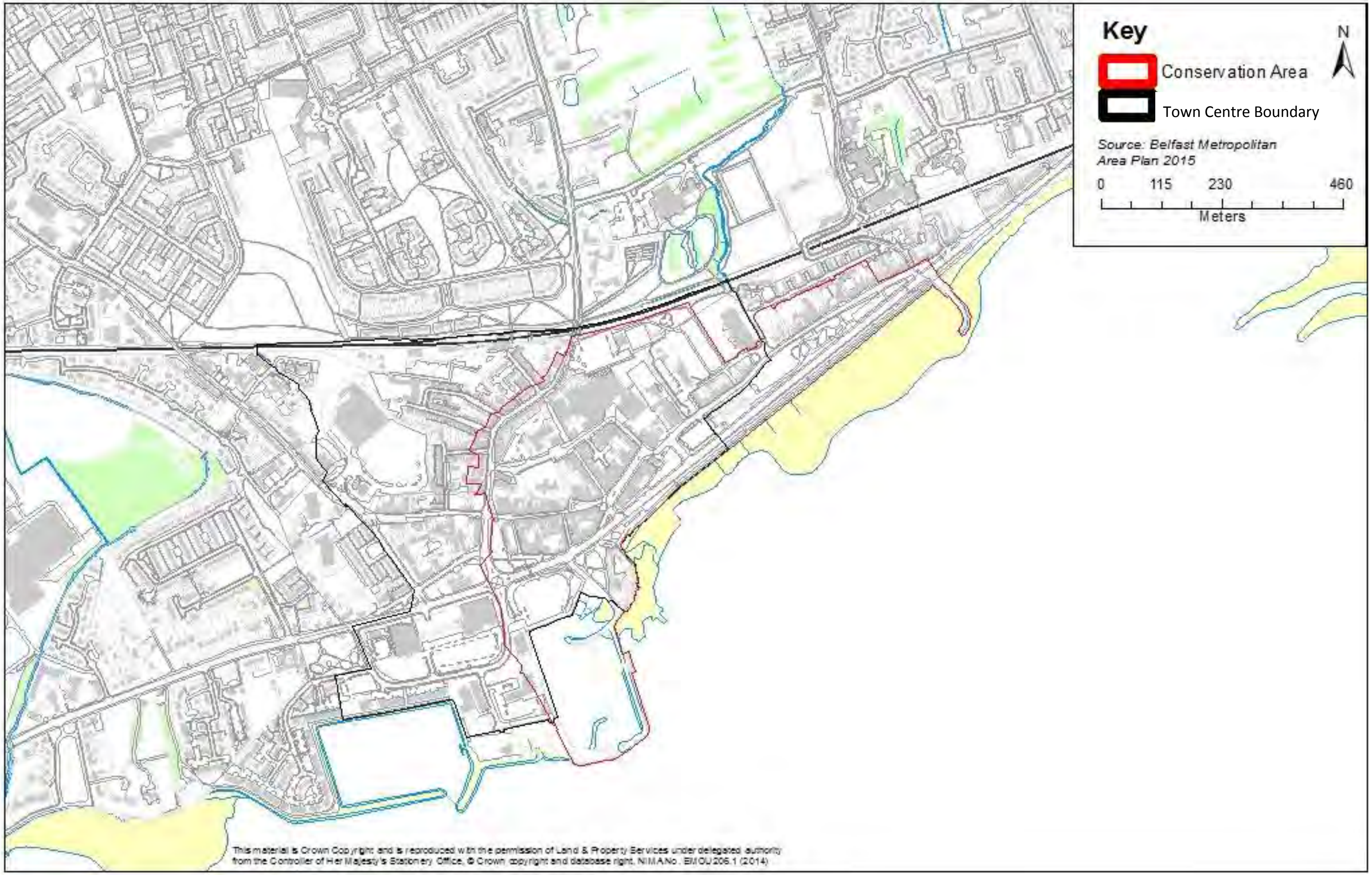
Carrick Vs UK average	Comparison	Convenience	Retail Services	Leisure Services	Financial & Business Services
More than UK average	Charity shops Childrens wear, footwear			Cinemas, clubs, sports and leisure facilities	
Less than UK average	Furniture general, newsagents, musical instruments, textiles and soft furnishings	Fishmongers, greengrocers off licences, markets, health food shops	Vehicle repairs , vehicle rental	Bars & winebars, Disco, Dance & nightclubs, sports and leisure facilities	Business goods and services, printing and copying

Map D1:



Carrickfergus Town Centre Residential Properties 2015
N
Legend
Town Centre Boundary
Residential properties

Map D2: **Carrickfergus Town Centre Boundary**



APPENDIX E RETAIL CAPACITY STUDY METHODOLOGY

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 Floorspace

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

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