MID & EAST ANTRIM DISTRICT

LOCAL DEVELOPMENT PLAN PREPARATORY STUDIES

PAPER 4: TOWN CENTRE & OPPORTUNITY SITES

MARCH 2015

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BACKGROUND & PURPOSE OF THE PAPER

The purpose of this paper is to provide the Council with an overview of the three main town centres of Ballymena, Larne and Carrickfergus.

The paper sets out the regional and local context for formulating Local Development Plan (LDP) policies for retailing and other uses in town centres. It then provides an overview of existing provision and up-take of identified development opportunity sites in the Ballymena Area Plan 1986-2001, Larne Area Plan 2010 and Belfast Metropolitan Area Plan (BMAP) so far as it refers to Carrickfergus. A town centre profile of the three towns is also provided.

This paper allows members to commence consideration of how a strategy for town centres and retailing may be formulated within the context of the RDS and the Strategic Planning Policy Statement.

However, at this stage the paper only aims to provide a foundation for developing the retail and town centre component of the LDP. The evidence base on this topic will need to be further informed by more detailed surveying and evaluation of town centre designations together with updated health checks and assessments of the need for retail and other town centre uses over the Plan period. A Sustainability Appraisal and public consultation will also inform the town centre strategy for the three towns.

Together with the initial papers on Population and Growth, Housing and Settlement and Employment and Economic Development, this preparatory work will build the evidence base for the new LDP. This evidence base will be supplemented with information gathered as part of the Community Planning process. When substantially in place the evidence base will provide a robust foundation for the Council in bringing forward a Plan Strategy for Mid & East Antrim District to replace that contained in the existing Area Plans.

AIMS

- To build the capacity of members to make informed planning decisions, particularly within the plan making context;
- To provide baseline information which will inform planning policy making at local level; and
- To link with important ongoing work in relation to the development of a Community Plan and other strategic work being undertaken by the Council.

CONTENT OVERVIEW

The paper provides-

i. The regional planning policy context relating to planning for town centres;

ii. An overview of the existing local planning framework, as contained in extant Area Plans;

iii. A town centre profile of Mid & East Antrim District, informed by relatively recent studies;

iv. A summary of Key Findings.

It is important to stress to members that in compiling the report the only statutory documents available are the Ballymena Area Plan 1986-2001, Larne Area Plan 2010 and BMAP 2015. However, two other recent retail papers prepared by retail consultants[1] and the three Masterplans[2] also provide important facts and findings in regard to relevant town centre issues.

RECOMMENDATION

Members note the findings and consider how to maintain and enhance vibrant town centres.

[1] *GL Hearn (2014) Town Centres and Retailing Research Project (DOENI) & GVA Grimley (2009) Antrim Ballymena Larne Town Centre & Commercial Leisure Development Study (Summary in Appendix A)*

[2] *DSD (2009) Ballymena Town Centre Masterplan, DSD (2010) Carrickfergus Town Centre Masterplan, DSD (2010) Larne Town Centre Masterplan*

SECTION 1

REGIONAL POLICY CONTEXT

REGIONAL DEVELOPMENT STRATEGY 2035

REGIONAL PLANNING POLICY STATEMENTS

SUPPLEMENTARY PLANNING GUIDANCE

1.0 REGIONAL POLICY CONTEXT

1.1 The Regional Policy Context is provided by the Regional Development Strategy (RDS) 2035 and regional planning policy statements. A summary of these documents as they pertain to plan making and town centre policy is provided in the following sections:

REGIONAL DEVELOPMENT STRATEGY 2035: BUILDING A BETTER FUTURE (RDS)

1.2 *The Regional Development Strategy 2035* (RDS), published on the 15th March 2012, is the spatial strategy of the Executive. It informs the spatial aspects of the strategies of all Government Departments and has a statutory basis. It is prepared under the Strategic Planning (Northern Ireland) Order 1999. Under that Order the Department for Regional Development (DRD) is responsible for formulating a strategy for the long term development of Northern Ireland.

"An outward-looking, dynamic and liveable Region with a strong sense of its place in the wider world; a Region of opportunity where people enjoy living and working in a healthy environment which enhances the quality of their lives and where diversity is a source of strength rather than division." (RDS Vision)

1.3 The RDS 2035 provides two types of long-term policy direction:

- **Regional Guidance**
- **Spatial Framework Guidance**

1.4 **Regional Guidance** (RG) is represented under 3 sustainable themes – Economy, Society and Environment. Two of the regional guidelines (*one included under the Economy theme and one under the Society theme*) have implications for town centres, as follows:

- **RG1 – Ensure adequate supply of land to facilitate sustainable economic growth** - 'The focus will be on larger urban centres and regional gateways taking advantage of their locations on the regional transport network'.

- **RG7 – Support urban and rural renaissance** - 'Develop innovative ways to bring forward under-utilised land and buildings, particularly for mixed use development'. The RDS recognises the importance of accessible, vibrant town centres which offer people more local choice for shopping, social activity and recreation.

1.5 **Spatial Framework Guidance** (SFG) – This is additional to the region-wide guidance and is tailored to each of the 5 elements of the spatial framework (Fig.1.1):

1. The Belfast Metropolitan Urban Area,
2. Londonderry (principal city of the Northwest),
3. Hubs and Clusters of Hubs,
4. The Rural Area; and
5. Gateways and corridors.

1.6 It also takes account of the hierarchy of settlements and the patterns of service provision (transport, education, commercial etc.) which the RDS deems to be appropriate at different spatial levels, i.e. villages, urban centres / smaller towns, regional towns / clusters and cities.

1.7 The overall purpose of the SFG is to promote balanced and integrated growth across Northern Ireland, including the revitalisation of established towns and villages. Within this context, the implications and main thrust of the SFG for the role and future development of towns and town centres in Mid & East Antrim District are discerned as follows:

1.8 **Ballymena** - The RDS recognises Ballymena as a 'main hub'. It emphasises the need for hubs to have attractive, vibrant town centres with multi-functional roles to include retail, service, administration, leisure and cultural roles. Ballymena is identified as having a well-established sub-regional role, particularly as a significant retail centre. The potential for tourism growth arising from the proximity of tourism attractions and good access to ports and airports is also noted.

1.9 **Larne** - is also recognised as a 'main hub' and a 'gateway' due to its strategic coastal location with a natural harbour and because it is the second largest port in Northern Ireland. The RDS notes that the location of the town on the Causeway Coastal Route has the potential to create a centre for tourism and with regeneration of the townscape to increase the vitality and prosperity of the town centre.

1.10 **Carrickfergus** - The RDS includes Carrickfergus as a key location within the Belfast Metropolitan Urban Area. It benefits from its position on the estuary of Belfast Lough. With a vibrant new marina, waterfront development and historic castle it has significant tourism potential, assisted by good transport links with Belfast and Scotland via Larne. The RDS notes that Carrickfergus has a complementary role to play within the BMUA and that it is important for the town to widen its economic base as a means of reducing its role as a mainly dormitory town.

Fig. 1.1: Spatial Framework for Northern Ireland

Source: DRD, Regional Development Strategy RDS 2035 Diagram No.2.3 Page 26

REGIONAL PLANNING POLICY STATEMENTS

Planning Policy Statement 5 (PPS5): Retailing & Town Centres & A Strategic Planning Policy Statement for Northern Ireland (draft SPPS)

1.11 The RDS, is complemented by the DOE's Planning Policy Statements, which set out the policies of the Department on particular aspects of land use planning and apply to the whole of Northern Ireland. The most relevant to the subject matter of this Preparatory Paper is *PPS5: Retailing and Town Centres*, published in 1996.

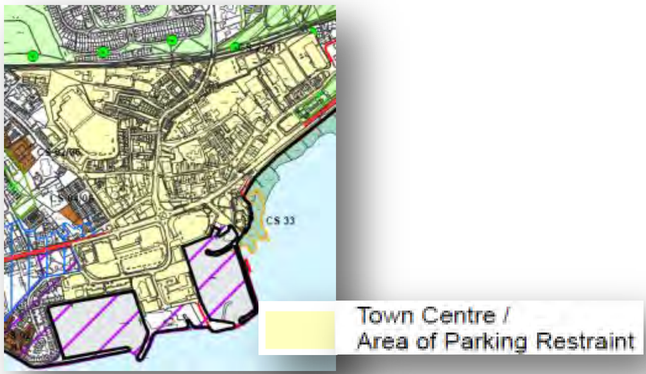
1.12 However, PPS 5 is to be replaced by new strategic policy relating to town centres and retailing, contained within the Strategic Planning Policy Statement (SPPS), a draft of which was issued for consultation in February 2014. The SPPS is intended to provide a framework for the operation of the new two–tier planning system coming into effect on 1st April 2015, when the majority of planning functions will transfer to local Councils. The SPPS will introduce a modified approach to planning policy for town centres that will encompass retailing and other appropriate town centre uses.

1.13 The stated aim of the draft SPPS in this regard is to support and sustain vibrant town centres across Northern Ireland, consistent with the RDS. The key policy requirement of the SPPS is that planning authorities must adopt a town centre first approach for retail and main town centre uses.

1.14 The SPPS requires the LDP to bring forward a Strategy for town centres and retailing containing appropriate policies and proposals to further the strategic direction as well as addressing the needs, challenges and opportunities for improving town centres.

Key elements of such a Strategy as identified in the SPPS include:

1. **Define a network and hierarchy of centres, town, district and local centres** acknowledging the role and function of rural centres;
2. **Define the spatial extent of town centres** and **primary retail cores**;
3. **Set out appropriate policies** that make clear which uses will be permitted in the hierarchy of centres and other locations and factors that will be taken into account for decision taking;
4. **Provide for a diverse offer and mix of uses** which reflect local circumstances;
5. **Allocate a range of suitable sites** to meet the scale and form of retail and other town centre uses.



1.15 In order to inform the Retail / Town Centre Strategy, the SPPS requires LDPs to prepare an evidence base, comprising:

- An assessment of the need or capacity for retail and other main town centre uses across the plan area, and;
- Preparation of town centre health checks which are to be regularly reviewed at least once every 5 years. The SPPS refers to a number of indicators (e.g. vacancy rates, footfall and commercial yields) which can be considered in carrying out such health checks.

SUPPLEMENTARY PLANNING GUIDANCE

1.16 In addition to regional policy, relevant supplementary planning guidance includes *Living Places: An Urban Stewardship and Design Guide for NI (2014)* which sets out the key principles behind good place making. It seeks to inform and inspire all those involved in the process of managing and making urban places.

SECTION 2

LOCAL POLICY CONTEXT - EXISTING DEVELOPMENT PLANS

BALLYMENA AREA PLAN 1986-2001

LARNE AREA PLAN 2010

BELFAST METROPOLITAN AREA PLAN 2015 (BMAP)

2.0 LOCAL POLICY CONTEXT – EXISTING DEVELOPMENT PLANS

BALLYMENA AREA PLAN 1986-2001

2.1 The Ballymena Area Plan 1986-2001 was adopted in November 1989. Ballymena is designated as the main town in its district and is seen as the focus for major commercial, retail and office development. The Department's aim was to facilitate the development of a vibrant town centre with a full range of associated uses and to provide centrally located land for these uses while ensuring good quality development to enhance the appearance of the main district town.

2.2 The Plan includes policies and guidance addressing the following:

- **Town Centre Boundary** – was drawn to include both existing typical town centre uses and adjoining land to allow for expansion over 15 years, providing a range of sites for commercial development to meet the ever changing pattern of retail activity. The Plan specified that vacant buildings or cleared sites in the town centre would be given "more favourable consideration" than those on the edge of town or Greenfield sites. The town centre boundary included additional areas with a significant proportion of vacant or underused land and property with a view to urban renewal.

- **Pedestrian Priority Areas** were introduced to enhance the attractiveness of the town for pedestrians. Three out of five have been developed to date.

- **Design** – The Area Plan promoted good quality design especially in areas with Listed Buildings (see Ballymena Town Centre Design guide).

- **Street Frontage** – The Plan stated that proposals for non-retail uses at street level in main shopping areas need to be carefully assessed in regard to the potential loss of retail frontage and the attractiveness of these streets to shoppers.

- **Residential use (retained and new)** – The Area Plan did not zone sites for housing within the town centre but promoted high density residential development where appropriate as part of mixed use proposals. Some terraces were identified for protection to prevent piecemeal development to the detriment of remaining dwellings. Sub-division from dwellings to apartments was accepted so long as there was adequate off street parking when needed.

LARNE AREA PLAN 2010 (LAP)

2.3 Adopted in March 1998, the *Larne Area Plan 2010* pre-dated publication of the RDS 2025 in September 2001.

2.4 **Town Centre Policies & Proposals:**

- **Town Centre Boundary** - (Policy TC1) Within the designated town centre, only uses which were compatible with existing uses would be acceptable in order to protect viability of the adjacent commercial core.
- The area to the north of Pound Road/Exchange Road/Victoria Road was protected from retail use by Policy TC2 to protect its residential and community amenity.
- **Environmental Improvement Schemes** - (Policies TC3, TC5 & TC6) including painting, planting open space provision, paving etc.
- **Protected Town Centre Housing** - (Policies TC7 & TC8) at Station Road and Circular Road.
- **Control of office Development outside the town centre** - (Policy TC9) Large scale (200+ sqm) and medium scale (6—200 sqm) office development would continue to be concentrated within the established town centre to help reinforce the existing administrative and service function.

2.5 **Commercial Core Policies & Proposals:**

- **Commercial Core boundary** - (Policy CC1) defined, within which all new large scale retail development was to be located.
- **Redevelopment Schemes** - (Policies CC2 & CC3) at Main Street and High Street/Pound Street were proposed to improve the appearance of the commercial core to attract both public and private investment.
- **Preferred Retail development sites** - (Policy CC4) at Main Street, High Street, Pound Street were proposed to strengthen the commercial base of the town centre.
- **Environmental Improvement Schemes** - (Policies CC5, CC6 & CC7) at Main Street, Broadway and Upper and Lower Cross Street were proposed to help develop the commercial core shopping environment.
- **Pedestrian Priority Area** - (Policy CC8) was proposed to exclude traffic from the west side of Broadway Square along with car park removal from the central area to create a pedestrian priority area. It was intended that this open area would have potential as a townscape feature.
- **Control of Office Development** - (Policy CC9) Office development at ground floor level was to be considered acceptable in principle at Upper and Lower Cross Street, Dunluce Street, Narrow Gauge Road, Quay Street and Agnew Street to help improve the local environment. (Policy CC10) Office development was also acceptable in principle at first floor level along the primary shopping frontage at Upper Main Street and Main Street. (Policy CC11) Non-office uses were to be controlled at ground floor level along primary retail frontages.
- **Protection from change of use to Housing in the Commercial Core** - (Policy CC12) Change to residential use will be resisted at Quay Street within the commercial core.

BELFAST METROPOLITAN AREA PLAN 2015 (BMAP)

2.6 *BMAP*, as adopted, became operative on 9 September 2014. Part 4 Volume 4 of BMAP 2015 sets out policies on Carrickfergus District and replaces Carrickfergus Area Plan 2001. The BMAP employment strategy seeks to sustain balanced economic growth and job creation by promoting City and Town centres as the focus for retail and office functions.

2.7 The policies of BMAP will apply to Carrickfergus area until a new LDP is published for Mid & East Antrim.

2.8 BMAP promotes Belfast City Centre as the leading shopping centre and Carrickfergus as one of the towns acting as the focus for additional retail capacity. The BMAP aim for Carrickfergus is to improve the general environment and strengthen town centre and promote the Marine Complex & Urban Waterfront.

2.9Policy R1 in Part 3, Volume 1 of BMAP sets out a general presumption in favour of retail development in all town and city centres in the plan area.

- **Town Centre Boundary** - (Designation CS 28)
2.10 The town centre boundary differs from that in the Carrickfergus Area Plan 2001, to encourage regeneration and improve the town centre image. The concentration of shopping and leisure uses in the Rodgers Key area of the Marina is now included, while the Scotch Quarter area is excluded. This is aimed at increasing footfall and concentrate activity in the main shopping areas, to help reduce vacancy and enhance viability of the town centre.

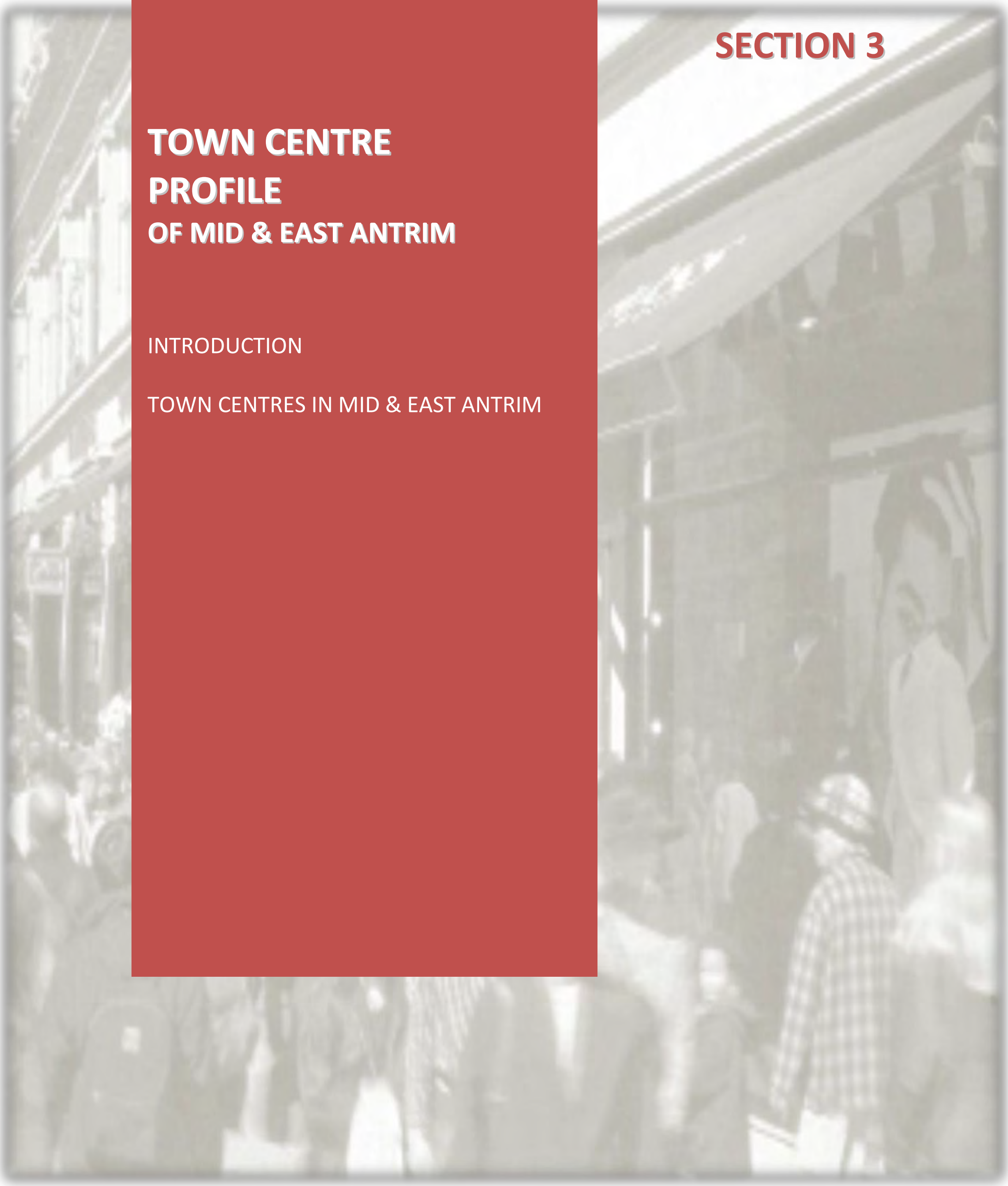
- **Protected Town Centre Housing Areas** - (Designation CS 29)
2.11 The Plan designates Albert Road, St. Brides Street, Thomas Street, Victoria Street, Unity Street, Nelson Street, West Street and Joymount as Protected Town Centre Housing Areas. These areas provide valuable housing stock and support established communities. They contribute to the vitality of the town centre, reduce vandalism and make it a more attractive place to live. The Plan policy states that the spread of commercial development into these areas will be resisted, with a presumption against planning permission for development that results in a change of use from housing.

- **Area of Parking Restraint** - (Designation CS 30)
2.12 This policy seeks to reduce dependence upon the car as a means of transport and promote a shift to more sustainable transport patterns, including greater use of public transport. The policy seeks to implement this through controls on the amount of non-operational parking to be provided in association with new development.

- **Urban Design Criteria** - (Policy CS 31)
  2.13 The Urban Design Criteria seek to strengthen the Town Centre character by promoting key sites and protecting the existing fine grain and structure. Its intention is also to restore the Waterfront and Castle as key focal points.

  - Development shall respect the established building line;
  - Building heights shall generally be 3 storeys on principal streets to reinforce scale and character. Taller buildings of up to 4 storeys will only be acceptable where it is demonstrated that they act as a landmark building, which aids legibility;
  - The external façade of development sites shall reflect the fine pattern and traditional character of the Town Centre; and
  - Developments in the vicinity of the waterfront shall preserve and, where possible, enhance views to the Castle.

- **Town Wall** - (Policy CS 32)
  2.14 New development should respect the town wall and allow access for long-term maintenance. Planning permission will not be granted for development that will prejudice the protection and conservation of the historic town wall.



SECTION 3

TOWN CENTRE PROFILE
OF MID & EAST ANTRIM

3.0 TOWN CENTRE PROFILE OF MID & EAST ANTRIM DISTRICT

INTRODUCTION- General Trends in Retailing

3.1 There are a number of concerns facing many town centres in NI. The weaknesses and threats identified by GL Hearn (2014), "*indicate that it would be appropriate to have a stronger policy stance on protecting and enhancing town centres, encouraging private sector investment & development and making town centres the focus for not just retail but other significant footfall generating uses*".

3.2 The retail sector is also described as one of the most dynamic sectors of the UK economy and is constantly evolving and adapting in response to consumer and lifestyle tends and other market influences. Over the past 30 years, the retail sector has benefited from growth in both personal income and disposable consumer spending, coupled with population growth. However, the recession has had a depressing effect and retail spending year on year for the next three to five years is expected to be relatively low.

3.3 Another significant change has been the rise of home shopping and electronic commerce. The home shopping sector includes a number of retailing channels including catalogue sales, direct retailing, TV shopping and internet shopping. An increasing number of 'high street' retailers now offer internet shopping (*GL Hearn, 2014*). eRetail now accounts for around 10-12% of the UK retail sales. However, the growth in online shopping habits does not mean the death of the High Street. The arrival of 'click and collect' where consumers order online but visit the store to collect their goods can be good for the market. For example, eBay recently announced a trial 'click and collect' service to allow customers to collect from Argos stores, purchased products from around 50 eBay merchants (*Lisney, 2013).* John Lewis has a similar type of arrangement with local shops in Northern Ireland such as Spar and Costcutter. Such services can help ensure that town centres continue to attract footfall and remain viable.

3.4 Nationally, the food and beverage sector is one of the few town centre components which continues to grow, fuelled primarily by coffee shops (e.g. Starbucks, Café Nero etc) and family dining operators (e.g. Pizza Express). These outlets do provide vitality and footfall to town centres but it needs to be balanced carefully against the loss of other retail elements *(GL Hearn, 2014)*.

3.5 There is also a growing trend by national multiple retailers to rationalise their property portfolios into larger stores in the larger centres for economies of scale and market penetration. This has implications for NI's centres, many of which are neither large enough nor have enough shop units to attract national multiples. Retailers are looking at affordability in their overall occupancy costs and will more readily locate in out of town or even secondary locations where business rates are not so prohibitive *(Lisney, 2013).*

3.6 In conclusion, the GL Hearn report suggested that in order for town centres throughout the UK to prosper, they needed to offer an experience over and above an average functional shopping trip which might otherwise be carried out on line or at the out of town retail park. The emphasis is on making town centres more attractive, viable and sustainable with more mixed use futures i.e. not just focusing on traditional shopping.

Town Centres in Mid & East Antrim

3.7 The remainder of the paper sets out a town centre profile of Ballymena, Larne and Carrickfergus towns. These profiles are centred on the two main types of evidence that the SPPS requires of Local Development Plans in bringing forward strategies for town centres and retailing:

- **An assessment of the need or capacity for retail and other main town centre uses**;
- **Town Centre health checks.**

3.8The profile will also look at the availability of Development Opportunity sites in the respective town centres.

3.9 A town centre health check is essentially a qualitative assessment in that it looks at the attractiveness, accessibility and amenity of the town centre. Although no single indicator can effectively measure the health of a town centre, the use of a series of them can provide a view of performance and offer a framework for assessing vitality and viability. Vitality is a measure of how busy a centre is and viability is a measure of its capacity to attract ongoing investment for maintenance, improvement and adaptation to changing needs. Key indicators include accessibility, customer views, diversity of uses, retailer profile, environmental quality, pedestrian flows, retailer views, shop rents, crime and vacancy rates.

3.10 The health checks undertaken by GL Hearn to inform the draft SPPS are not full and detailed vitality and viability assessments, but are intended as a snapshot of each town centre to provide a flavour of the diversity and performance pertaining at the time of the survey.

3.11 A retail capacity study is a 'quantitative' assessment of the need for additional retail floorspace over the Plan period. This will include catchment area definition, calculating total expenditure and turnover of convenience and comparison goods, and projection of future needs. The most recent retail capacity study was carried out in 2009 by GVA Grimley and relates to Ballymena & Larne Town Centres.

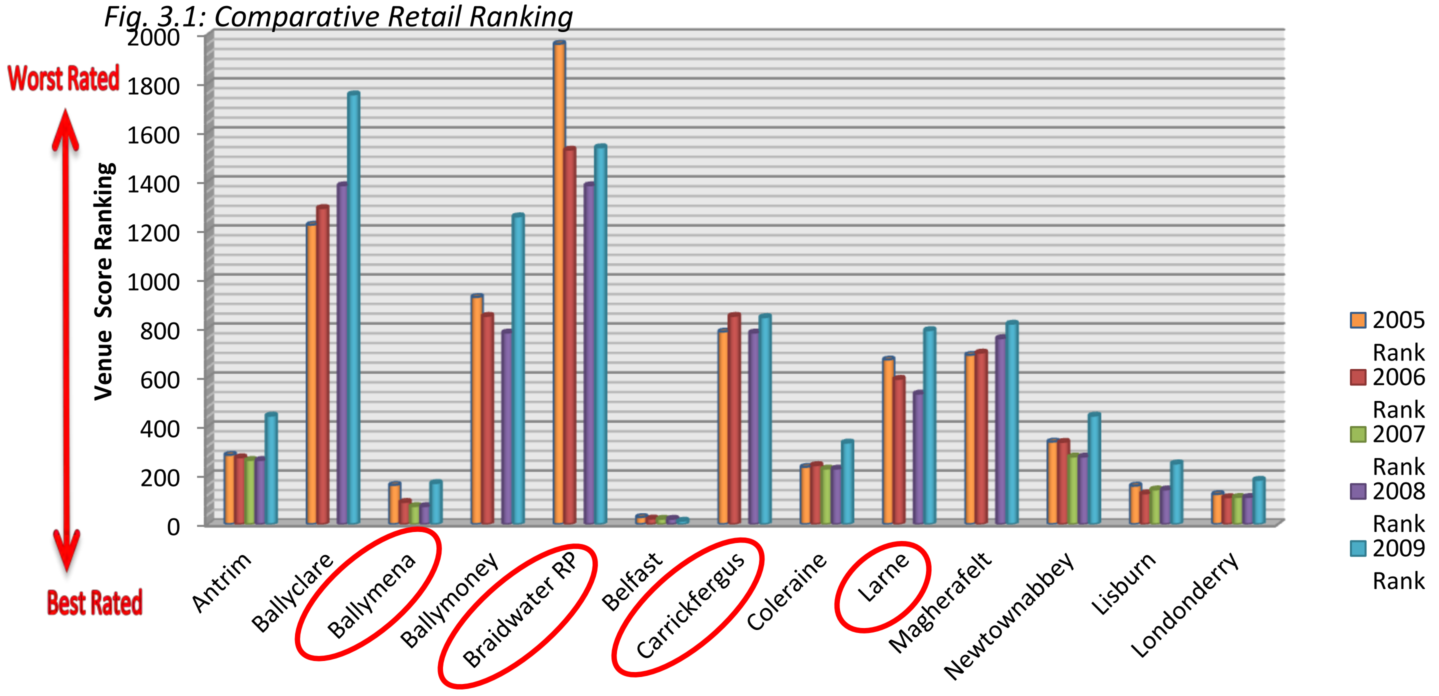
3.12 The new LDP for Mid & East Antrim will require an evidence base to be developed to reflect the current needs capacity and health of each town centre in order to inform the retail / town centre strategy of the emerging Plan. However, for the purpose of this paper, it is intended to refer to the most up-to-date available information[3], with a view to presenting a broad profile of each town centre.

3.13 A key indicator of the vitality and viability of a centre is its "ranking" over time (*Comparative Retail Ranking –DSD Report July 2009*). The performance of Ballymena, Carrickfergus and Larne relative to other NI centres in the retail hierarchy, is illustrated in Fig. 3.1, which is measured by the venue score ranking index on national retailer representation.

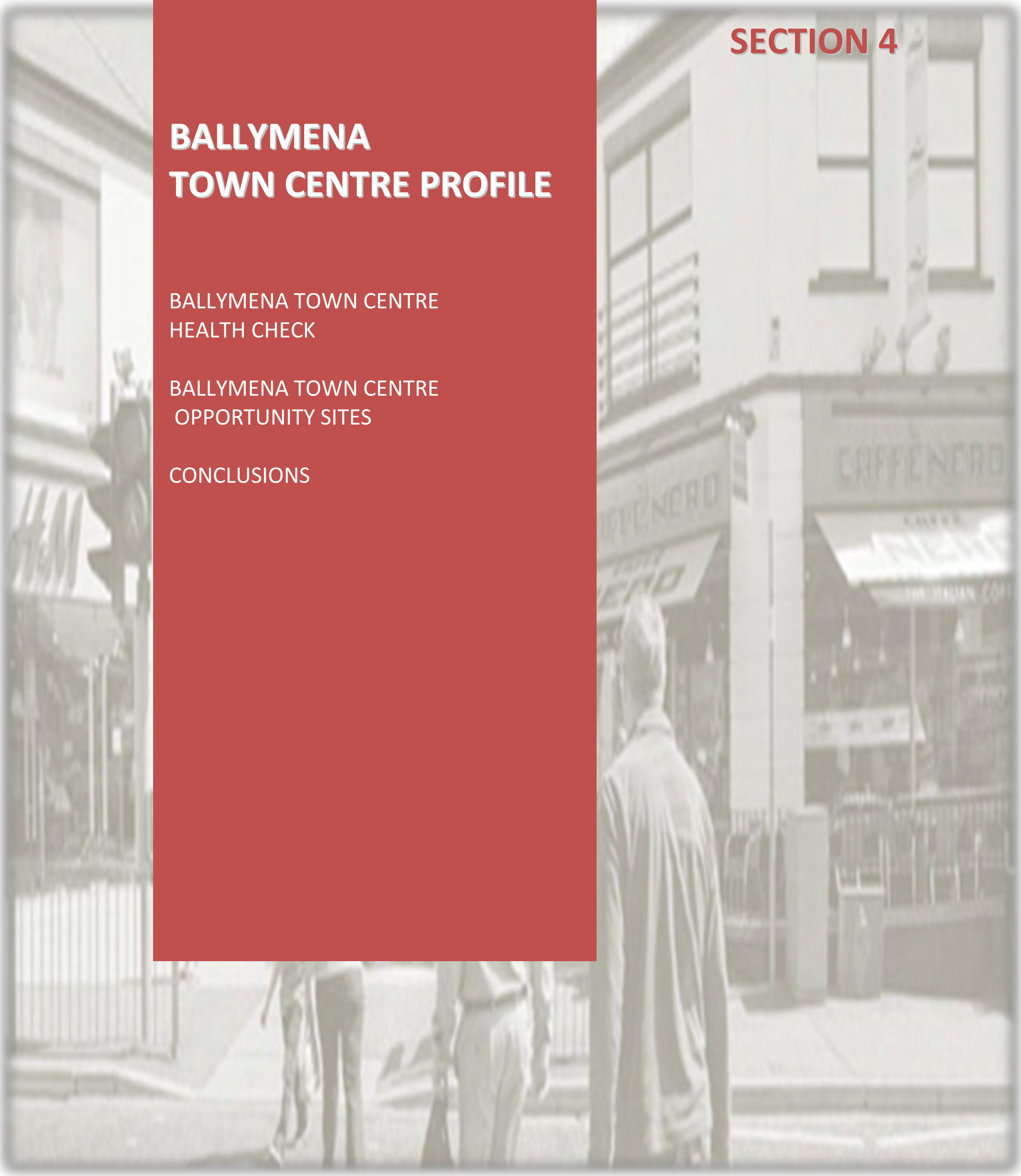
3.14 The best performing centres have the lowest rankings, and therefore a higher ranking equates to lower performance. The performance of the three towns has fluctuated between 2005 and 2009, however the vitality ranking for all of them has dropped during this period, with Larne experiencing the largest drop of 120 rankings. Fig. 3.1 also makes reference to Braidwater Retail Park, which is located within Ballymena town centre. This was ranked the worst performing centre in 2005, however its vitality ranking had improved significantly by 2009.

[3]*GVA Grimley (2009) Antrim, Ballymena and Larne Town Centre Retail & Commercial Leisure Development Study and GL Hearn Town Centres & Retailing Research Project (2014) remits & key outputs available in Appendix A.*

Fig. 3.1: Comparative Retail Ranking



Source: DSD/DOE - Town Centre Venue Score 2005 – 2009



SECTION 4

BALLYMENA
TOWN CENTRE PROFILE

BALLYMENA TOWN CENTRE
HEALTH CHECK

BALLYMENA TOWN CENTRE
OPPORTUNITY SITES

CONCLUSIONS

4.0 BALLYMENA TOWN CENTRE PROFILE

4.1 Ballymena is a large town centre, performing a sub-regional function and benefits from having a wide variety of town centre uses. The town centre provides a diverse range of retail units, formats and sizes and has good representation from independent retailers as well as national multiples.

4.2 The average town centre gross floorspace size in Northern Ireland outside of Belfast is 68,800 sq.m. Ballymena is almost double that at 132,490 sq.m with only Newry, Derry/Londonderry and Belfast having greater gross floorspace.

4.3 This section firstly considers the most recent assessment of need / capacity for retail and other main town centre uses in Ballymena. This is then followed up by consideration of the most recent town centre health check information available.

ASSESSMENT OF NEED OR CAPACITY FOR RETAIL & OTHER MAIN TOWN CENTRE USES IN BALLYMENA

4.4 The most recent formal assessment of need /capacity for Convenience, Comparison and Bulky Goods floor space is the Quantitative Analysis carried out by GVA Grimley in 2009 (Capacity Assessment Methodology provided in Appendix E).

Convenience Capacity Assessment findings (Main Food/Top up food share per food store)

4.5 This assessment gathered information on the in and out of town centre convenience spend per store. Statistics showed that the main Tesco store and Sainsbury's were grossly overtrading against their own benchmarks in 2009 but generally other convenience stores inside the town centre were under performing. The impending closure of Tesco Express on Church Street reflects these findings and supports the evidence regarding the strength of the out-of-town centre convenience provision.

Table 4.1: Percentage market share spend arising within Ballymena Catchment Area as defined in GVA Grimley report 2009

	Convenience Main Shop	Convenience Top up
Ballymena Town	82.2%	67%
Town Centre	**2.8%**	**14.5%**
Tesco	48.9%	9.5%
Sainsbury	26.5%	6.6%
Lidl	0.3%	1.4%
Neighbourhood Centres	4.3%	35%
Villages/Leakage	17.8%	33%

Table 4.2: Nominal amounts of floorspace need over the next 10 years for large & medium stores in Ballymena Town Centre

Floor space need (sqm)	2016	2018	2021	2026
Large Store	15sqm	23sqm	36sqm	58sqm
Medium Store	32sqm	50sqm	78sqm	125sqm

Projected Growth rate 0.4% per annum (2009-2016) and 0.9% per annum (2017 -2026)

4.6 The GVA Grimley assessment concluded (Table 4.2) that there is limited quantitative capacity for additional convenience provision in the town centre over this time frame. Moreover, due to the town centre convenience stores under performing (Table 4.1 refers), the report suggested there may be little justification for seeking additional convenience floor space in the town centre over the next 10 years.

4.7 Ballymena town centre convenience stores (main shop) only held 2.8% of the market share of catchment area even though there are no obvious deficiencies in offer with Lidl, Iceland, M&S foodhall and Spar and a strong local independent offer of bakers, butchers etc. However, they do perform better than the out-of-centre stores in the convenience top-up market share.

4.8 The village/leakage figure (17.8%) represents the remainder of total potential spend within the Ballymena catchment area that has been spent in other towns/villages. This leakage is most likely due to travel to work patterns.

4.9 Although the 2013/14 GL Hearn study did not include a formal quantitative needs assessment, it suggested that the town centre would benefit from being anchored by a medium/large food store as statistics showed that in 2012 convenience outlets comprised only 6% of the overall number of units in the town centre.

4.10 While additional out-of-centre convenience stores would increase customer offer and create competition for the hugely overtrading Tesco and Sainsbury food stores it would be likely to lead to further detrimental impact of the performance of the convenience retail offer in the town centre.

Ballymena Comparison Goods Analysis

4.11 In 2012, the GVA Grimley report found that comparison outlets comprised 35% of the overall number of units in the town centre and 48% of overall floorspace.

4.12 The GVA Grimley household survey carried out as part of this assessment, showed that Ballymena commands an overall 89.3% comparison goods market share of its catchment area in addition to significant expenditure inflow from Carnlough, Antrim, Ballymoney and Ballycastle catchment zones with only a minor outflow to Belfast. Overall, the town centre performs well with high expenditure retention from the immediate catchment retaining 95.8% in clothing spend, 81.3% of recreational goods (Braidwater Park retained a further 12.7%), 82.5% of domestic appliances (with Braidwater again performing a secondary role with a 7.3% market share). Personal/luxury goods also has a vast proportion of the market share at 88.1%.

Future Need for Comparison Shopping

4.13 On the basis of the forward population and expenditure growth, the current market share performance secured by the town centre from its sub-regional hinterland, generates the quantitative need for comparison goods floor space in Ballymena as illustrated in Table 4.3.

Table 4.3: Quantitative need for comparison goods floor space in Ballymena

Scenario/Year	2012	2018	2026
1) Low Growth	2,659 sq m. (gross)	8,258 sq m. (gross)	16,414 sq m. (gross)
2) High Growth	3,598 sq m. (gross)	13,624 sq m. (gross)	35,936 sq m. (gross)

Low growth rate 1.5% per annum 2009-2016, 2.8% per annum 2017-2026 High Growth rate 2.5% per annum 2009-2016, 5% per annum 2017-2026. The adjusted expenditure figures are applied to the population forecasts to obtain the total available expenditure within the catchment zone

4.14 The GVA Grimley baseline capacity assessment identifies a potential need to plan for additional comparison development within the town centre during the latter stages of the plan period. However, the report also recommends that given the strength of the town centre retail offer, the overriding emphasis should be on securing qualitative improvements such as improving the shopping environment in the Tower Centre (dated design, layout and entrances) which would enhance the town centre retail offer without the need for quantitative expansion.

Scope for improvement in the Market Share

4.15 In order to improve the c. 90% market share the town centre needs to attract higher order fashion retailers such as those located in Victoria Square, Belfast. The potential to attract this type of retailer however would be limited and probably would need to be developer–led in any event.

4.16 Having said that, in order to consolidate the towns role as the main retail centre for the north east of NI, the creation of additional comparison development floor space should still be considered in bringing forward new town centre plans.

4.17 Similarly, If it is deemed appropriate to improve the market share of the town centre, then the LDP could bring forward policy to restrict major comparison shopping or mixed retailing proposals that may arise outside the town centre.

Ballymena Bulky Goods Analysis

4.18 The GVA Grimley household survey carried out as part of this assessment showed that Ballymena town centre retains 71.7% of the total bulky goods expenditure available within the immediate Ballymena catchment. While this is lower than the Comparison retention rate it is still positive given the strength of the bulky goods offer at Braidwater Retail Park (16.2%), which is also within the designated town centre boundary. The town centre also attracts significant inflows from the wider sub-region including Carnlough and Antrim catchment zones. Outflows to Belfast are negligible.

4.19 Whilst the overall performance of the town centre is strong, the performance is consistent when assessed on an individual bulky goods sector basis with 78.8% retention of furniture/flooring spend; 57.3% DIY Goods (with Braidwater anchored by B&Q claiming another 35.2%); 76.3% major household appliances; and 75.1% Large Electrical goods.

Future Need for Bulky Goods Shopping

4.20 On the basis of low and high expenditure growth scenarios modelled by Grimley, the capacity modelling exercise identifies quantitative capacity for bulky goods identified in Table 4.4.

Table 4.4: Quantitative Need for bulky goods in Ballymena

Scenario/Year	2012	2018	2026
1) Low Growth	975 sq m. (gross)	3,027 sq m. (gross)	6,017 sq m. (gross)
2) High Growth	1,319 sq m. (gross)	4,994 sq m. (gross)	13,173 sq m (gross)

4.21 Whilst the baseline capacity assessment identifies a need for additional floor space the report considers there to be limited prospect of the town centre enhancing its bulky goods market share beyond current retention levels. It therefore suggests there is no overriding need for additional provision for bulky goods especially given the availability of vacant town centre units.

4.22 If developer-led proposals for bulky goods/ retail warehousing should emerge within Ballymena then it should be assessed against emerging SPPS tests. It was suggested by Grimley that if a sequentially preferable, centrally located site becomes available in the town centre, priority should be given to improvement and expansion of the comparison offer.

Other Town Centre Uses- Leisure Assessment

4.23 The GVA Grimley household survey results revealed that 16% of respondents visited the town centre 2-3 times a week for daytime leisure activities but 39% never used the town centre for this purpose. However, there would appear to be no obvious deficiency in the town centre's commercial leisure offer, given the presence of the cinema complex as well as public and private gyms. The report therefore does not see a requirement to identify any new town centre sites for leisure or health provision. However if a developer-led proposal on a centrally located site should emerge, then subject to addressing SPPS policy tests, additional provision could bring qualitative benefits to the town centre.

4.24 The Ballymena Masterplan has aspirations to create an office based commercial quarter in the town centre.

Evening Economy

4.25 The household survey shows that the town centre is a popular destination in terms of evening economy for those in the immediate Ballymena catchment area. However, as the town performs a wider regional role, the report considers, the food and drink offer as well as family orientated entertainment to be underdeveloped. The Bridge Street/ Braid River corridor is identified by the Ballymena Masterplan as a possible opportunity site for a mix of cultural and leisure uses. Development of this area within the town centre as a leisure quarter could address leisure deficiencies without adversely impacting on the primary retail function of the town centre.

Summary of Ballymena Town Centre Strengths and Deficiencies of the Retail Offer

4.26 Ballymena town centre has varied market share retention in convenience, comparison and bulky goods expenditure within its immediate catchment area, performing very strongly in the comparison sector, particularly in clothing. The bulky goods sector has a good overall market share, albeit that this relies much on the sale of DIY goods from B&Q, Braidwater Retail Park's anchor store. The most apparent problem for the retail sector in the town centre is the low level of convenience expenditure. Despite a reasonable variety in the town centre convenience offer, the larger out of centre food stores take the major share of main food expenditure. The town centre stores however, perform better in the food top-up market. Sustaining this positive aspect is likely to influence future retail strategy brought forward by the LDP.

4.27 As the town performs a sub-regional role there would seem to be merit in seeking to better its market share of the already very successful comparison goods expenditure. Improvement of the evening economy by increasing the offer of restaurants and pubs as well as family orientated leisure would also seem to be worth pursuing.

4.28 The overall emphasis coming through in Grimley's analysis is that before considering additional provision for the various retail sectors in the town centre, the primary remit should be to improve the quality of the shopping environment. It is envisaged that this should attract more people into the town centre thereby maximising the potential for increased expenditure.

BALLYMENA TOWN CENTRE HEALTH CHECK

Retail Use

4.29 The retail floorspace within the town centre is estimated to be 107,665 sq. m. gross (2013) consisting of convenience, comparison and service uses (*GL Hearn, 2014*). The primary retail frontage streets in Ballymena Town Centre are Wellington Street, Church Street, Ballymoney Street and Broughshane Street. There are also two shopping centres included within this floorspace calculation – Fairhill Shopping Centre and Tower Centre.

4.30 The most recent survey of town centre uses available is an Experian Goad[4] category report generated in October 2012. Appendix B Table B1 shows a breakdown of units and floorspace. The main findings are that the town centre has approximately one third less retail services and almost double the number of vacant units than the UK average for similar towns. There are much higher numbers of ladies clothing and charity shops and a lower number of winebars and leisure facilities than UK averages also.

Convenience goods

4.31 The outlet counts for Convenience, Comparison and Retail Services focused on the primary and secondary shopping streets and the Fairhill and Tower centres. Of the 515 units surveyed, convenience outlets accounted for 6.21%. Iceland, M&S and Tesco national foodstore operators are present in the town centre. There is also a good level of representation of independent convenience retailers including 4 butchers, 1 greengrocers, and 6 bakeries /confectioners, 2 small convenience stores and 4 health food shops. The Tesco and Sainsbury outlets outside the town centre on the Larne Link Road attract the majority of the convenience market share away from the town centre.

[4] *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*

Comparison goods

4.32 In terms of comparison provision, there is an excellent selection of clothing and footwear retailers alongside a healthy number of national multiples and clothing-led department stores throughout the town centre. Other comparison sectors represented include toys/ gaming, chemists, crafts/ gifts/ china etc. jewellers, electrical and other durables, and phone shops. In 2012, 34.5% of town centre outlets were comparison. These are mainly concentrated in the Fair Hill Centre, followed by Ballymoney Street and Church Street.

Retailer Representation

4.33 Ballymena has 24 out of the 29 national multiples operating in Northern Ireland at present. These retailers are most likely to improve the consumer appeal of a centre and increase pedestrian traffic which will increase sales opportunities. Notable multiple retailers absent from the town centre are BHS, House of Fraser and John Lewis.

Financial and Retail Services

4.34 Financial Services including banks, building societies, financial advisors, solicitors and estate agents are found throughout the town centre but with a notable concentration along Wellington Street accounting for 11% of all units. In terms of retail services, there is a range of dry cleaners, opticians, travel agents, repair services and notably 32 hairdressers and beauticians spread evenly throughout the town centre. These account for approximately 12% of outlets.

Residential Use

4.35 The location of residential accommodation within the town centre boundary is shown in Map B1 of Appendix B. More detailed information will be forthcoming when the 2011 census data becomes available.

Leisure Services

4.36 There are 70 outlets within Ballymena town centre that fall under this category with some 53 of these are made up of cafes, pubs and fast food take-aways. Winebars, nightclubs, hotels/guesthouses and sports and leisure facilities are poorly represented according to UK averages for similar towns

Edge of town floorspace

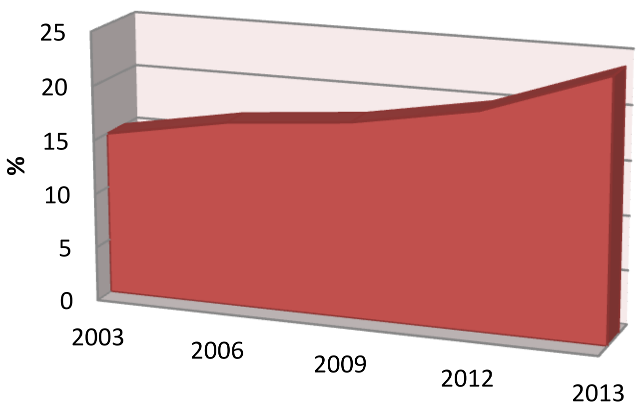
4.37 There is limited retail floorspace available along edge of centre land apart from on Henry Street and Broughshane Street. The dominant uses are residential, carparks and educational uses. The extensive town centre boundary was designated by the Department to encourage urban renewal and as such included a number of areas with a significant proportion of vacant or underused land and property. The majority of this land has now been developed with Sainsbury's Foodstore, Pentagon Retail Park, and additional land incorporated into the Fairhill Shopping Centre along with the zoned development site.

Vacancy

4.38 Vacancy rates are a key measure of how healthy a town centre is. According to Lisney[5] vacancy rates in NI are declining although the regional vacancy rate in 2014 was 17.7% compared to the average vacancy rate in the UK of 10.3%. A Goad report carried out in October 2012 found 23% of outlets in Ballymena town centre were vacant.

4.39 In May 2013, there were 126 vacant units in Ballymena Town Centre *(GL Hearn, 2014)* accounting for 24% of all premises, which was an increase from the 112 counted in October 2012. There were notable concentrations of vacant premises in the Tower Centre and Linenhall Street. Historic Experian Goad data shows that vacancy rates in Ballymena have been steadily on the increase since 2003. However, statistics gathered by the Ballymena BID team for the town centre retail core show that vacancy rates are not as high in these main shopping streets at around 16-18%.

Fig 4.1: Vacancy Rates in Ballymena town centre



[5] *Lisney (2014) Northern Ireland Retail Update*

Rental Values

4.40 Research for the GVA Grimley report, 2009 indicated that local agents advised that Zone A rents for the primary retail pitch within the town centre (Ballymoney Street, Wellington Street, Church Street and Broughshane Street) were in the order of £35 – £40 per ft^2 although agents commented that lettings at this level were extremely infrequent at that time and are likely to fall further. However, the Fairhill Shopping Centre achieved prime-pitch rental values of £900 – £950 per m^2.

Business Rates

4.41 Business rates have been cited as the primary factor in deterioration in the level of occupancy on the prime pitch (primary shopping streets). The introduction of revised rateable values – effective from 1st April 2015 – is anticipated to bring reductions in rates for prime retail shops in the high street.

Footfall

4.42 The town appeared to have high levels of footfall along Church Street, Wellington Street, Ballymoney Street and in the Fairhill Shopping centre, with significantly lower pedestrian flows in and around the Tower Centre according to GL Hearn, who observed pedestrian flow in April/ May 2013.

4.43 GVA Grimley monitored footfall counts in 2009 and recommended improving pedestrian assess and circulation, with a view to improving footfall. The approved Public Realm scheme will hopefully go some way to addressing this issue with its pedestrian/car compromise along the core streets.

4.44 In 2013, permanent footfall counters were installed at Church Street, Broughshane Street and Ballymoney Street, to assist with information gathering for the preparation of the Ballymena BID application. Monitoring of these figures will be useful in comparing Ballymena to similar sized towns and will help inform the emerging Plan.

Accessibility

4.45 The town centre is located off the A26 and serves a wide rural catchment. There is ample car parking provision with a total of 2,350 parking spaces provide by multi-storey and surface level car parks around the town centre.

4.46 For those using public transport, the Ulsterbus and Train Stations are located together on Galgorm Road with reasonable pedestrian linkages across North Road. However, they are not readily accessible to the town centre at approximately 500 metres away. There are, however, a series of local bus routes in operation that provide services to the town centre from the outlying residential areas, connecting into the bus/rail station along with other bus stops in the town centre itself.

4.47 In terms of walking there are a number of residential areas located on the periphery of the town centre with pedestrian access varying in standard, convenience and environmental quality. The quality of pedestrian linkages between Sainsbury's foodstore and the main town centre is poor.

4.48 The volume of traffic in the town centre, particularly around the bandstand area, has a detrimental impact on pedestrian movement particularly at peak times. The Masterplan informed by a transport assessment identified lost street connections, pavements being too narrow for pedestrians, pedestrian/vehicle conflict and poor cycle storage as specific movement related problems.

4.49 In considered of these issues the Ballymena Masterplan suggested a number of measures including, restructuring of the traffic system.

Environmental Quality

4.50 In terms of environmental quality, a public realm scheme, sponsored by DSD including Ballymoney Street, Broughshane Street, Wellington Street, Church Street, Bryan Street, Thomas Street, Mill Street and William Street is due to commence in Spring 2015 promoting a shared space so that people are given priority over traffic. The main features incorporated in the scheme for the area are the creation of a main focal point for the town centre and public space at Broadway, the use of high quality materials such as Caithness stone, introduction of bespoke street lighting, street furniture and signage.

4.51 Smaller ongoing schemes implemented by the Council include a successful 'revitalise scheme' on Church Street and Bridge Street which was funded by the Department of Social Development (DSD). In all some 47 properties and two gap sites were enhanced and five new businesses opened in the 'Revitalise Zone'. There is anecdotal evidence of increase retail performance linked with these improvements. A second 'Revitalise' scheme is approved for Castle St, Lower Bridge St and Mill St to improve street frontages (painting, new shop fronts, guttering).

4.52 Environmental quality is compromised by high vacancy rates in specific areas such as Linenhall Street and Mill Street. Unfortunately this negates the positive contribution of the new Braid Arts Centre. In other areas such as Greenvale Street which is pedestrianised, there is a high quality environment with well maintained active commercial frontages. The Fairhill Shopping centre is a modern well maintained environment but the tower centre has a dated layout and unit configuration *(GVA Grimley, 2009).*

BALLYMENA BID

(Business Improvement District)

4.53 A BID business plan has recently been circulated to all eligible businesses within the town centre BID area. It aims to create a quality Environment where people can access the town centre easily and efficiently by car, on foot or by public transport. It also strives to ensure the town holds a mix of sectors and services which support each other and further enhances the towns offer and vitality.

Ballymena Town Centre Issues

Strengths/Opportunities	Weaknesses/ Threats
+ Diversity of town centre uses.	– Train/Bus Station detached from town centre
+ Recognised sub-regional town with strong market share in comparison sectors from the Ballymena catchment area & beyond.	– Vacancies & potential obsolesce of some floorspace.
+ Strong national multiple & local independent retail offer.	– Amount & profile of out of Centre convenience retailing.
+ Available Town Centre parking provision.	– Limited private sector town centre development/ investment.
+ Good accessibility & public transport to get to town.	– Retail core traffic flows & congestion leads to conflict with shoppers.
	– Lack of public realm & poor environmental quality in some areas.
	– Limited interest in town centre leisure activity aside from cinema.
	– Low footfall on secondary streets

Summary of Ballymena Town Centre Health Check

4.54 In summary, the key findings from these town centre studies are as follows:

- Recent retail capacity studies would suggest that there is only a modest need for additional floorspace in Ballymena. However, such studies need to be updated to take account of changes in retail and property market trends, as well as spend and population growth projections;
- The town centre has a diverse range of shops, retail services, offices and other businesses. This diversity – highlighted as a strength of many NI towns in GL Hearn's study for the DOE - is important to the vitality of town centres which should be viewed as multi-functional locations providing a range of uses including shopping, community, residential, office and leisure uses;
- The town centre has a good presence of family-run or independent retailers alongside more well-known national multiples;
- Increasing vacancies in the town centre is a concern.

BALLYMENA TOWN CENTRE OPPORTUNITY SITES

Ballymena Area Plan 1986-2001 - Development Opportunity Sites

4.55 A number of development opportunity sites were identified in the Ballymena Area Plan particularly for commercial or retail proposals. Whilst residential development was acceptable on some of these sites, preference was stated for proposals of a commercial nature.

4.56 In these areas the Department hoped to stimulate redevelopment by combining private and public investment.

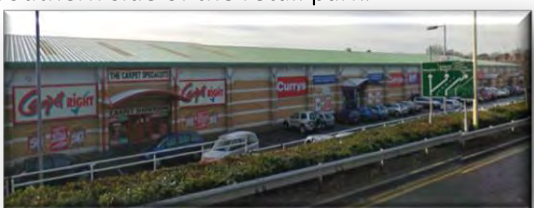
Ballymena Town Centre Development Opportunity Sites in Ballymena Area Plan:

- Henry Street / Queen Street
- Braidwater Mill
- North Street / Smithfield Place
- Bryan Street (North & South)
- High Street
- The Fairhill / Old Ballymena Academy

4.57 The vast majority of these sites have now been completely or mostly developed:

4.58 **Henry Street / Queen Street** - This site has now been developed to incorporate a number of modern shops including a Chemist, newsagents, hot food bars etc. A portion of the site also made way for the road link at Gilmore Street. Only the car park portion remains undeveloped but this is currently well used.

4.59 **Braidwater Mill** - This site has now been completely developed with large retail units, the anchor tenants including Curry's and Poundstretchers. A number of large retailers also occupy the site. This also leads to the Sainsbury's site and across the river to the Southern side of the retail park.



4.60 **North Street / Smithfield Place** - This site has now been completely developed and currently contains the Smithfield Surgery and Domino's Pizza. No further development opportunity potential exists.

4.61 **Bryan Street North** - Most of this site was developed by the building now occupied by Poundstretchers. The former bank, although currently empty had seen re-development to a commercial unit. A small portion remains undeveloped behind the former bank building of approx 50m2.

4.62 **Bryan Street South** - This site has mostly been developed with an almost entirely new front facade along Bryan Street. These properties are currently unoccupied save for the Halifax Building Society.

4.63 **High Street** - This site has been largely developed as retail units and a cafe which front out to the multi-storey car park/lower Greenvale Street area.

4.64 **The Fairhill / Old Ballymena Academy** - This site when originally zoned comprised the Alexander Street site and the old Fairhill Market. The Fairhill Shopping Centre has now been developed and has encompassed the Old Ballymena Academy site which did not form part of the zoning. The Alexander Street/William Street portion of the zoning remains undeveloped, although Compulsory Purchase powers may be needed to acquire the remaining portions of private land. The land either side of Alexander Street is currently being used for surface car parking. On the fringes of the site some units have already been re-developed such as the Casino Experience on the site of the former Sportsmans Bar and the commercial development currently occupied by Spice Indian Restaurant/Yvonnes Florist on the site of the old filling station.

GVA Grimley Report, 2009 – Development Opportunity Sites

4.65 The GVA Grimley report also identified the above Fairhill Site as having development potential and recommended that it be allocated for Class A1 comparison retail development, although upper floor residential or commercial development would be appropriate a part of a comprehensive mixed use scheme. The site specific policy should recognise that this under used site represents a significant opportunity to accommodate a high quality retail development which integrates the Fairhill Shopping Centre with the wider retail core.

4.66 **The Tower Centre Extension (Wellington Street)** - was considered appropriate for Class A1 Retail Development as well as an opportunity to extend the Tower Centre and provide modern retail floor space on a prominent retail frontage in the retail core.

4.67 Several town centre car parks are identified by GVA Grimley as having development potential:

4.68 **Church Street car park** - is recommended for allocation as a Class A1 retail development, the site is presently under utilised and given that Tesco Express is closing the overall site and building offers a significant opportunity to deliver a large retail unit in a prominent location.

4.69 **Rear of Garfield Place car park** - subject to comprehensive review of town centre car parking capacity, the site could provide additional opportunities for mixed use development including Class A1 retailing if frontage onto Broughshane Street can be achieved. Although any new development would have to be carefully designed given surrounding residential dwellings.

4.70 **Springwell Street car park** - This site could provide additional opportunities for mixed use town centre development subject to comprehensive review of town centre car parking capacity. Any new development should seek to provide a transition between residential uses on Springwell Street and the primary retail area to the south of John Street.

4.71 **Bridge Street / Castle Street** – this site is a prominent town centre gateway opportunity located opposite the Braid Arts Centre. It presently comprises of a surface car park and a mix of secondary retail and commercial uses, with a lot of vacancy along Bridge Street. Given its location between the town centre primary retail area and the Braidwater Retail Park to the south of the Larne Road Link the site provides an opportunity to create linkages between the respective retail areas and could be suitable for a mixed-use development including commercial leisure (restaurants and bars), civic uses, employment (office), residential apartments and ancillary Class A1 retail uses.

4.72 All sites with remaining development potential are shown in Appendix B: Map B2.

Ballymena Masterplan, 2009 – Development Opportunity Sites

4.73 The Masterplan proposes 4 focus areas that need specific projects to revitalise those areas and the town centre as a whole.

4.74 **Bridge Street & Braid River** - The plan annotates the Castle Street car park/Bridge Street and Castle Street area as a major development opportunity. Proposals include creating a public Square in front of the Braids Art Centre, improving the pedestrian environment around the Bridge Street traffic island and establishing riverfront development and associated public realm to reconnect the underused Braid River asset.

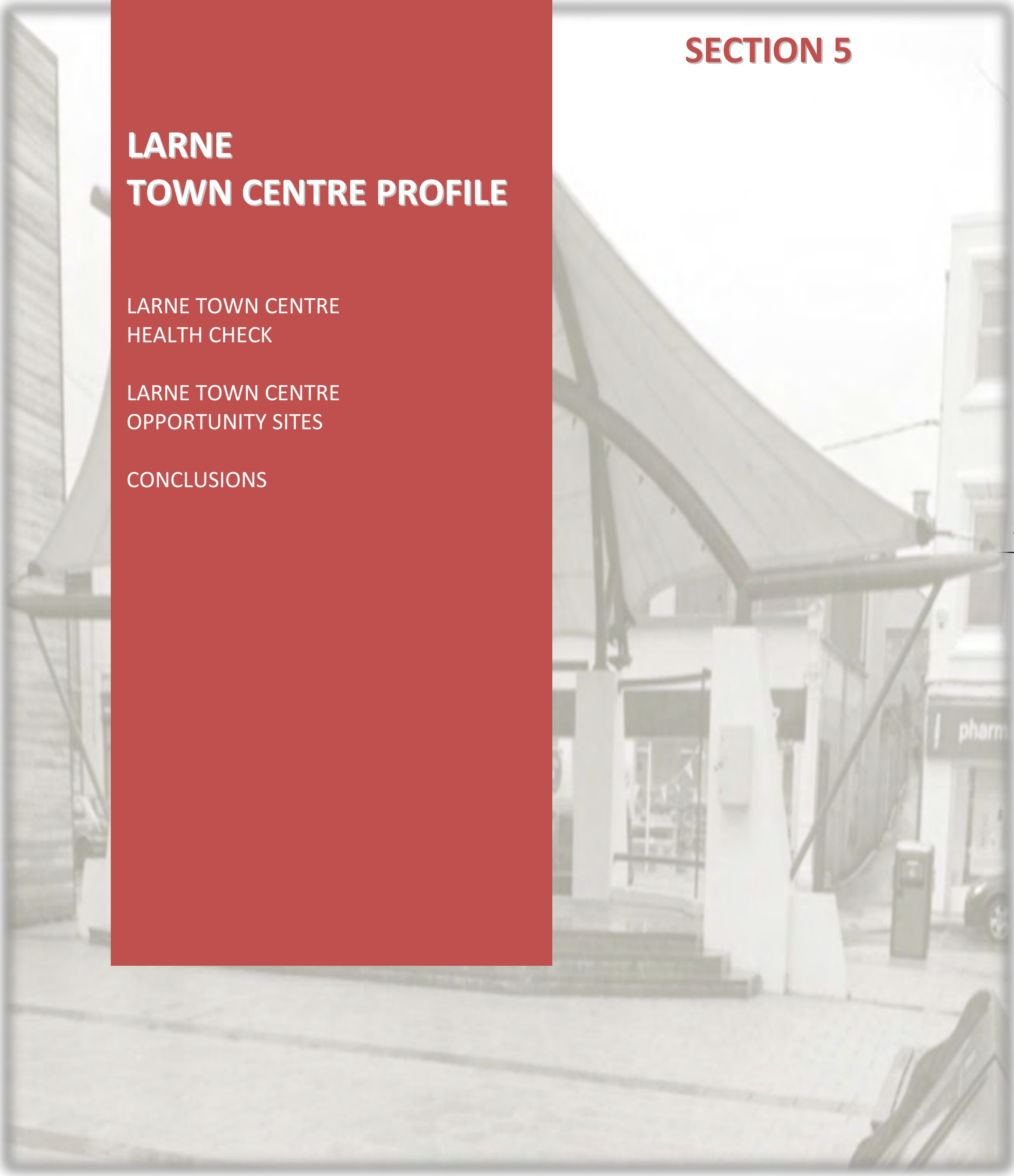
4.75 **Galgorm Road** - The proposal focuses on the connectivity from the bus/train station to the town centre rather than development of a specific site.

4.76 **Alexander Street / Springwell Street** - design proposals focus on alleviating the lack of activity and high number of derelict properties by developing the Alexander Street site in a way that keeps activity on the adjacent streets. Also, the design proposals seek to develop the area in front of Springwell Street into a new public space.

4.77 **St. Patrick's Barracks** - The focus is to maximise pedestrian and vehicular linkages with the town centre and provide outward-facing development to front onto the river capitalising on valuable river and greenway views. The Masterplan suggests mixed use as likely to benefit the town centre, with housing forming a significant part of the development. It was also suggested that relocation of key public services could be relocated here such as PSNI and the Fire & Rescue Service.

Conclusions

4.78 A mix of large and small opportunity sites and several car parks are identified in the town centre through the Ballymena Area Plan, Masterplan and the GVA Grimley study. The suitability and physical capacity of all potential development opportunity sites needs to be assessed in order to identify the appropriate uses and scale of floorspace that could realistically be delivered. This will involve consultation with relevant bodies and stakeholders.



SECTION 5

LARNE
TOWN CENTRE PROFILE

5.0 LARNE TOWN CENTRE PROFILE

5.1 Larne is a coastal town with a traditional linear town centre. There is a high concentration of small shop units comprising independent retailers and service uses as a well a reasonable level of national multiples. Compared to the average town centre gross floorspace size in Northern Ireland (outside of Belfast) of 68,800 Sq. m, Larne is close to the average, having 57,070sq.m.

5.2 This section firstly considers the most recent assessment of need / capacity for retail and other main town centre uses in Larne. This is then followed up by consideration of the most recent town centre health check information available.

ASSESSMENT OF NEED OR CAPACITY FOR RETAIL & OTHER MAIN TOWN CENTRE USES IN LARNE

5.3 The most recent formal assessment of need /capacity for Convenience, Comparison and Bulky Goods floor space is the Quantitative Analysis carried out by GVA Grimley in 2009 (Capacity Assessment Methodology provided in Appendix E).

Convenience Capacity Assessment findings (Main Food/Top up food share per food store)

5.4 This assessment gathered information on the town centre convenience spend per store to give an overview of the position at 2009. There was a clear quantitative and qualitative need for a new convenience retail offer in Larne town centre given the lack of a main stream foodstore. However, since then a new Asda foodstore has opened, outside Larne town centre. A new up to date household survey would need to be carried out for the new plan given the likely changes in shopping patterns and to understand the market share performance and impact of Asda on the existing town centre convenience provision.

Larne Comparison Goods Analysis

5.5 According to GVA Grimleys quantitative needs analysis in 2009, Larne's comparison goods sector was performing relatively well, given its position in the sub-regional hierarchy, securing 50% of the comparison goods spend from the immediate catchment zone. This however, was attributed more to the geographical location of Larne town, rather than the strength of its retail offer.

5.6 The household surveys carried out by Grimley highlighted that local residents found the existing town centre comparison offer to be deficient and lacking quality national multiples with a significant number of local residents in the Larne catchment looking to larger centres in the retail hierarchy for comparison shopping needs.

Future Need for Comparison Shopping

5.7 In considering future need for comparison shopping in Larne town centre, GVA Grimley suggested two alternative scenarios. Firstly, accept that it is unlikely Larne could compete on a like-for-like basis with towns such as Ballymena and therefore assess future need based on projected spend and population only, so as to retain a constant market share. Alternatively, seek to increase the market share by attracting national multiples and retail provision of a sufficient quality so as to change shopping patterns. Grimley suggested additional lower end comparison provision would not in itself facilitate an increase in the comparison retail market share.

Table 5.1: Quantitative Need for comparison goods floor space in Larne- retain market share

Scenario/Year	2012	2018	2026
1) Low Growth	327 sq m. (gross)	1015 sq m. (gross)	2018 sq m. (gross)
2) High Growth	442 sq m. (gross)	1675 sq m. (gross)	4418 sq m. (gross)

Low growth rate 1.5% per annum 2009-2016, 2.8% per annum 2017-2026
High Growth rate 2.5% per annum 2009-2016, 5% per annum 2017-2026.
The adjusted expenditure figures are applied to the population forecasts to obtain the total available expenditure within the catchment zone

Table 5.2: Quantitative Need for Comparison Goods floor space in Larne- improve market share

Scenario/Year	2012	2018	2026
1) Low Growth	1,554 sq m. (gross)	2,189 sq m. (gross)	3,222 sq m. (gross)
2) High Growth	1,703 sq m. (gross)	2,864 sq m. (gross)	5,664 sq m. (gross)

Low growth rate 1.5% per annum 2009-2016, 2.8% per annum 2017-2026
High Growth rate 2.5% per annum 2009-2016, 5% per annum 2017-2026.
The adjusted expenditure figures are applied to the population forecasts to obtain the total available expenditure within the catchment zone

Larne Bulky Goods Analysis

5.8 The household survey carried out as part of this assessment showed that Larne town centre retained 48.4% of the total bulky goods expenditure available within the immediate Larne catchment in 2009 as well as notable market shares from Ballyclare and Carnlough. However, there is also significant outflow to Belfast, Ballymena and Newtownabbey. Finer analysis of the individual bulky goods shopping patterns identified the retention within the town centre of the following expenditure arising within the Larne catchment area:

- Furniture/ Flooring 47.4%,
- DIY goods 33.7%,
- Major household appliances 55.7%;
- Large electrical 59.1%

The table below is GVA Grimleys calculation of floorspace required for bulky goods based on population and expenditure growth.

Table 5.3: Quantitative need for Bulky Goods floor space in Larne, Constant Market Share

Scenario/Year	2012	2018	2026
1) Low Growth	156 sq m. (gross)	484 sq m. (gross)	961 sq m. (gross)
2) High Growth	211 sq m. (gross)	798 sq m. (gross)	2,104sq m. (gross)

Low growth rate 1.5% per annum 2009-2016, 2.8% per annum 2017-2026 High Growth rate 2.5% per annum 2009-2016, 5% per annum 2017-2026. The adjusted expenditure figures are applied to the population forecasts to obtain the total available expenditure within the catchment zone

Table 5.4: Quantitative Need for Bulky Goods floor space in Larne, Potential for improvement

Scenario/Year	2012	2018	2026
1) Low Growth	2,541 sq m. (gross)	2,836 sq m. (gross)	3,444 sq m. (gross)
2) High Growth	2,661 sq m. (gross)	3,250 sq m. (gross)	4,897 sq m. (gross)

Low growth rate 1.5% per annum 2009-2016, 2.8% per annum 2017-2026 High Growth rate 2.5% per annum 2009-2016, 5% per annum 2017-2026. The adjusted expenditure figures are applied to the population forecasts to obtain the total available expenditure within the catchment zone

5.9 Table 5.3 shows a limited quantitative need for expansion of the bulky goods sector in Larne town centre. However, GVA Grimley suggest there is considerable scope to deliver an enhancement in the bulky goods retail offer in Larne which would bring economic and sustainability benefits given distances travelled to other places. A model was therefore run projecting an increase in the existing market share performance from 48% to 60%. The results of this are shown in Table 5.4.

5.10 Whilst there are limited development opportunity sites in Larne town centre, GVA Grimley advise that plans should proactively seek to identify sites for bulky goods/ retail warehousing development in close proximity to the town centre. It also suggested that the provision of a new mainstream DIY store and also electrical store retailing major household and large electrical appliances are a particular priority which could significantly increase overall expenditure retention within the Larne catchment.

Other Town Centre Uses- Leisure Assessment

5.11 Cinema trips to locations outside the Larne catchment should be significantly reduced with the opening of the new cinema complex adjacent to the Asda foodstore, albeit the facility lies outside the town centre boundary. Likewise the Larne leisure centre lies well outside the town centre boundary but is very popular with nearly half of all local residents visiting it regularly according to the telephone survey conducted by GVA Grimley who report no need to proactively plan for additional fitness facilities in the town centre.

Evening Economy

5.12 The household survey shows that the town centre is a popular destination in terms of evening economy for those in the immediate Larne catchment area. However, the survey also showed that 45% of local residents never go into Larne town centre for daytime leisure activities and it was suggested that there is a need to seek to diversify the existing leisure offer towards more family oriented establishments.

LARNE TOWN CENTRE HEALTH CHECK

Retail Use

5.13 The retail floorspace within Larne town centre is estimated to be 52,127 sq.m. gross (2013) consisting of convenience, comparison and service uses *(GL Hearn, 2014)*. The streets within the commercial core in the Town Centre are Upper Main Street, Main Street, Upper and Lower Cross Street and Point Street. Laharna Retail Park is also included within this floorspace calculation.

5.14 The most recent published survey of town centre uses available is a Goad category report generated in November 2009. Appendix C: Table C1 shows a breakdown of units and floorspace by comparison/ convenience/ retail services/ leisure services, financial and retail services and vacancy and compares the findings to the UK average for similar towns. This shows that there were approximately one third less leisure services and almost 50% more vacant units than in similar UK towns. There were more financial services and charity shops and fewer nightclubs, hotels and guesthouses than a similar UK town.

Convenience goods

5.15 The outlet counts for convenience, comparison and retail services focused on the primary and secondary shopping streets and Laharna Retail Park. Of the 257 units surveyed, convenience outlets accounted for 7.78%. Dunnes, Lidl and Iceland national foodstore operators are present in the town centre. There is also a good level of representation of independent convenience retailers including 4 butchers, 3 greengrocers, and 4 bakeries /confectioners. A new Asda foodstore was developed outside the town centre in June 2010.

Comparison goods

5.16 In terms of comparison provision, there is a reasonable level of town centre diversity with a fair representation of national multiples and independent retailers. In 2012, 33.85% of town centre units were comparison outlets. These are mainly concentrated on Main Street and Laharna Retail Park.

Retailer Representation

5.17 Larne had 8 out of the 29 national multiples operating in Northern Ireland in April 2013 (*GL Hearn, 2014*), a significantly lower figure than Ballymena.

Financial and Retail Services

5.18 Financial Services including banks, building societies, financial advisors, solicitors and estate agents are found throughout the town centre accounting for 12% of all units as shown in the GOAD report in December 2009. In terms of retail services, there is a range of dry cleaners, opticians, travel agents, repair services and hairdressers / beauticians spread throughout the town centre. These account for approximately 13.62 % of outlets.

Residential use

5.19 The location of residential accommodation within the town centre boundary is shown on Map C1 of Appendix C. More detailed information will be forthcoming when the 2011 census data becomes available.

Leisure uses

5.20 According to the GOAD report (December 2009) there were 39 outlets within Larne town centre which fell into this category however half of these were made up of cafes and fast food take-aways. There was an under-representation of pubs, nightclubs, restaurants and hotels/guest houses and family entertainment facilities in Larne town centre at that time.

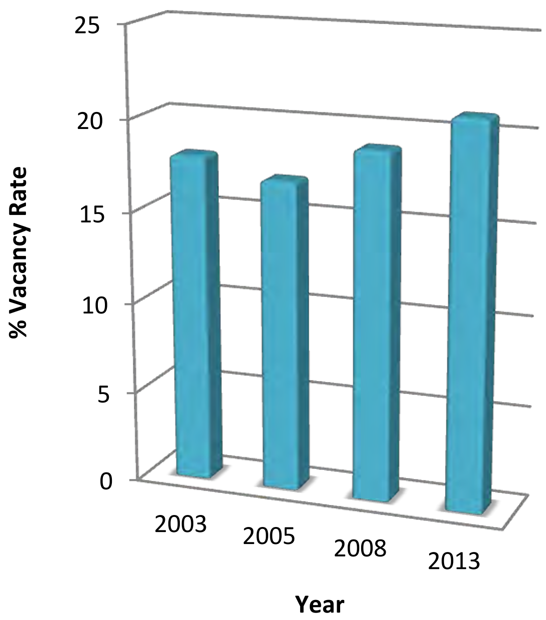
Edge of town floorspace

5.21 There is limited edge of centre commercial floorspace. The dominant uses are residential, car parks community and educational uses.

Vacancy

5.22 A Goad report estimated that approximately 18% of outlets in Larne town centre were vacant in October 2012 (Appendix C: Fig. C1). In May 2013 there were 55 vacant units in Larne Town Centre (*GL Hearn, 2014)* accounting for 21% of all premises. Notable concentrations of vacancy occured along Point Street and Dunluce Street, although many of these were small premises and in need of significant upgrading and investment to bring them back to meaningful use. The data shows that vacancy rates in Larne have been steadily on the increase since 2005.

Fig. 5.1: Larne % Vacancy Rate



Rental Values

5.23 Zone A rents in Larne Town centre, which are primarily focused along Main Street, are in the region of £30-£35 per square ft. Laharna Retail Park, located to the immediate south of Larne's primary shopping streets, is reported to have achieved prime-pitch rental values of £8.50 per square ft over the past 10-11 years.

Footfall

5.24 GL Hearn observed pedestrian flows in Larne town centre in April/ May 2013. The survey noted high levels of footfall along Main Street, particularly in the core retail area around Dunnes Stores which acts as somewhat of an anchor for the town centre. Steady pedestrian movement was also observed between Laharna Retail Park and Main Street indicating that the car park at the retail park may be performing a wider town centre function. Pedestrian flow was significantly reduced towards the eastern end of the town centre and southern edge along Point Street where most vacancy exists.

Accessibility

5.25 The town centre is located at the end of the A2 coastal route from Belfast, the A8 from Newtownabbey and the A36 from Ballymena and is the last stop on the regional rail service from Belfast (via Carrickfergus). Larne has an extensive bus service which serves outlying residential areas but there is also scope to improve bus stop provision along Main Street. However, notwithstanding the good public transport accessibility, the bus and rail stations are physically detached from the primary shopping area with users having to cross the busy Circular Road roundabout to reach the town centre. The Larne town centre regeneration Masterplan proposes relocation of the bus station adjacent to Larne Railway Station.

5.26 In terms of private car transport the one-way system does give rise to some accessibility issues and the Harbour Highway acts as something of a barrier between the main town centre to the north and the residual area to the south.

5.27 There is ample car parking provision in the town centre and Laharna Retail Park has 300 surface level parking space allowing shoppers to access the town centre retail stores with ease. Elsewhere the town centre car parks are located on the edge of the town centre and do not provide shoppers with such convenient arrangements. Main Street appeared to be particularly deficient in terms of car parking when assessed by GL Hearn, with very few spaces available and on street car parking subject to parking restrictions.

5.28 It is noted that the Larne town centre Masterplan proposes road improvements and environmental improvements to rationalise parking provision and pedestrian priority on Main Street. In terms of cycle access there is no dedicated cycle lanes or storage facilities.

Environmental Quality

5.29 As highlighted in the Local Policy context, the Larne Area Plan 2010 has several Environmental Improvement Schemes proposed within the Town Centre and Commercial Core. The key locations for improvement were the Town Core and Waterfront/Riverdale to be carried out in 3 phases over 15 years.

5.30 GL Hearn considered vacant plots along primary retail frontages to detract from the visual continuity of Main Street. Dunluce Street and Point Street suffer from high vacancy and unattractive servicing areas which impact adversely upon environmental quality.

5.31 The DSD 'ReStore' programme for Larne Town Centre commenced in July 2011 to help promote the town as a shopping destination and create a positive image for the town centre. The scheme was located on part of Upper Main Street to create a central area to attract greater footfall which would also benefit areas around it. A combined environmental improvements scheme in the town's Dunluce, Cross and Point Streets worth £85,000 ran alongside the ReStore programme. Works were completed in June 2012.

Designations and Constraints

5.32 The GVA Grimley report suggested omitting land to the South/South West of the Harbour Highway from the Town Centre Boundary as the road is a major physical barrier which isolates this area from the town centre. The report also suggested omitting the western side of Point Street from the Commercial Core as it has a mix of lower order shops. These recommendations have no statutory basis and may fall to be reconsidered in the emerging LDP.

Larne Town Centre Issues

Strengths/Opportunities	Weaknesses/ Threats
+ Good accessibility & public transport to get to town. + High % of Larne catchment area who socialise in bars/pubs & eat out do so in Larne town. + Comprehensive 15 year Regeneration Masterplan strategy in place & ongoing environmental improvements.	– Train/Bus Station detached from town centre. – Poor range of comparison shops including national multiples. – Major leakage of Bulky Goods expenditure to other towns. – Most town centre parking on edge of town locations. – Poor pedestrian linkages between town centre and Asda / cinema. – Limited town centre family leisure activities. – Low footfall and high vacancies on secondary streets.

Summary of Larne Town Centre Health Check

5.33 In summary, the key findings from these town centre studies are as follows:

- The town centre has a reasonable diversity of shops, retail services, offices and other businesses;
- Enhancement of the comparison retail offer, particularly increased representation of national multiples, would improve vitality and viability in the town centre;
- Enhancement of the bulky goods offer would reduce leakage of expenditure to other towns;
- The vitality of the town centre would benefit from additional family orientated leisure provision;
- The potential to attract significant tourist spend in this coastal and ferry port location needs to be fully exploited;
- The trend for increased vacancy rates in the town centre is a concern

LARNE TOWN CENTRE OPPORTUNITY SITES

Larne Area Plan 2010 - Development Opportunity Sites

5.34 Larne Area Plan zoned 5 small opportunity sites within the town centre. Proposed uses were discussed in the Local context section. Table C3 in Appendix C shows the current development status of these sites.

The Larne Town Centre Regeneration Masterplan (2010) & the GVA Grimley report (2009) - Development Opportunity Sites

5.35 These reports identified several similar sites within the town centre but have suggested varying potential uses.

5.36 **Land to West of High Street**- This is a triangular plot of land enclosed by Pound Street, High Street and the Harbour Highway. The Masterplan envisages the northern part of this site as an area for community gardens and public realm with a mix of office and residential mix in the short to medium term with redevelopment of the whole site, removal of buildings and replacement with a landmark hotel, mixed use retail, residential and associated public realm in the medium to long term. GVA Grimley, however, considers the site suitable for comparison retail offer as an extension to the commercial core and a possible area to facilitate larger sized national multiple stores.

5.37 **Circular Road car park** - The Masterplan sees this area as an events space around the tourist information centre, while GVA Grimley suggest an opportunity for bulky goods development in line with their need/ capacity study.

5.38 **Main Street East** - The Masterplan suggests a mix of retail, office and residential accommodation while GVA Grimley sees a significant development opportunity site with potential for a comprehensive redevelopment scheme to anchor the eastern end of Main Street. There is extant planning permission for Mixed use development, including ground floor retail, 57 Apartments, gym and 57 basement parking spaces covering a quarter of this site which has yet to be developed.

5.39 Other major town centre development proposals included in the Masterplan involve:

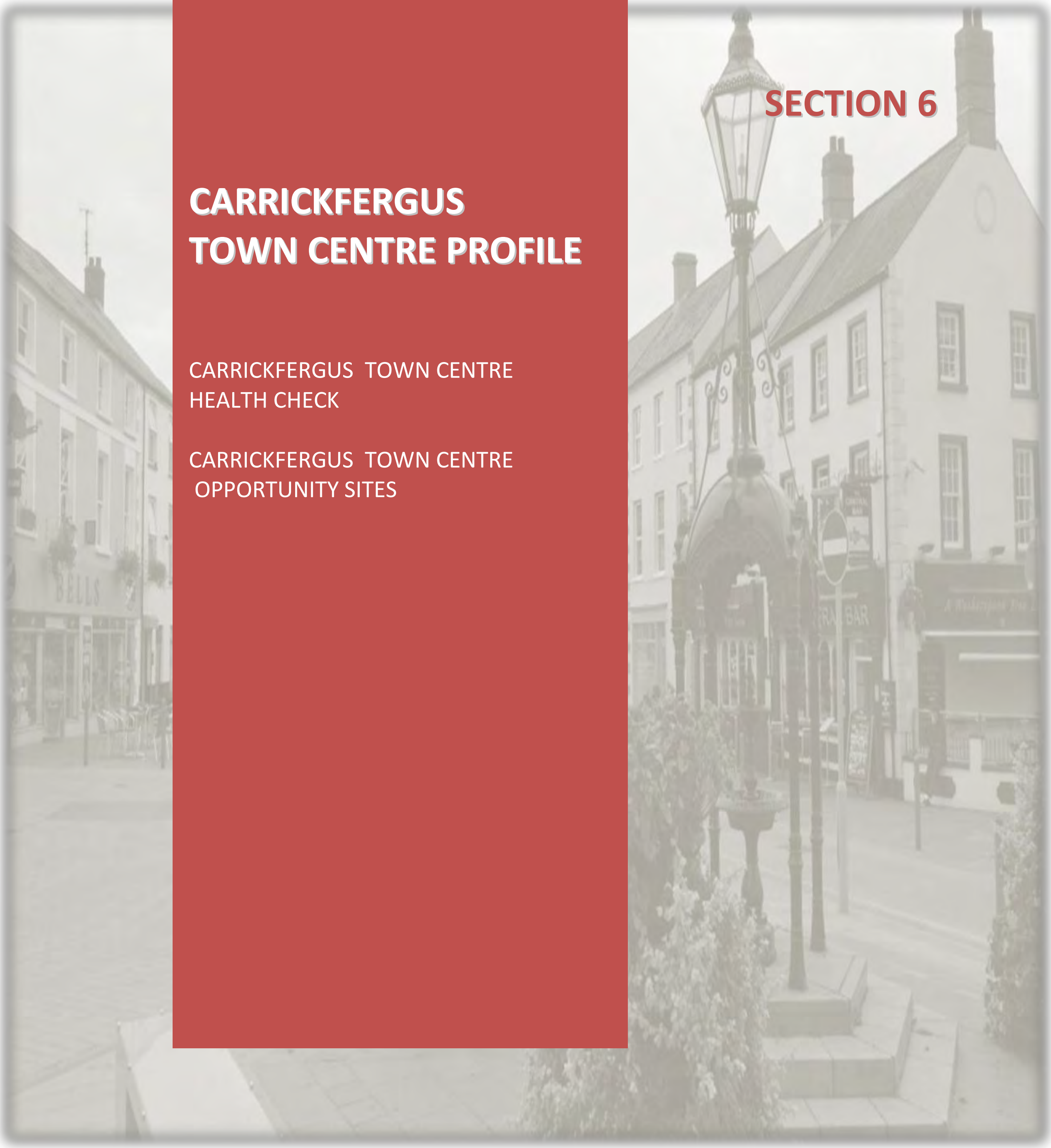
5.40 **Broadway Extension/ Redevelopment** - involving relocation of the existing Murrayfield Shopping Centre and creation of an associated public realm and redevelopment. Construction of a new road link between Main Street and Narrow Gauge Road and local transport interchange.

5.41 **Dunluce Point Street Redevelopment** - Removal of central buildings and installation of public plaza. Redevelopment of surrounding buildings and provision of multi-storey carpark.

5.42 **Waterfront Redevelopment** – Development of reclaimed land following Circular Road reconfiguration for leisure development and more permanent development of Events space.

Conclusions

5.43 A mix of small and larger opportunity sites have been identified in the town centre through the Larne Area Plan, Masterplan and GVA Grimley study. A few sites have already been developed and other sites will require phased development over 5-15 years in accordance with the long term plans of the Larne Regeneration Masterplan. Where appropriate the suitability and physical capacity of some development opportunity sites needs to be assessed in order to define the scale of floorspace and potential uses that could realistically be delivered. This will involve consultation with relevant bodies and stakeholders.



SECTION 6

CARRICKFERGUS TOWN CENTRE PROFILE

CARRICKFERGUS TOWN CENTRE HEALTH CHECK

CARRICKFERGUS TOWN CENTRE OPPORTUNITY SITES

6.0 CARRICKFERGUS TOWN CENTRE PROFILE

6.1 Carrickfergus town centre is a retail, tourist and general service centre, much of which is concentrated within a compact area defined in part by the historic town wall. In terms of overall floor space, Carrickfergus town centre is the fourth largest town centre within the BMA, after Belfast, Lisburn and Bangor. The gross floorspace size as noted in the GL Hearn report is 48,270sq.m. i.e. 20,000 sq. m less than the Northern Ireland Town Centre average in Carrickfergus

6.2 The town has faced strong competition from Belfast and other shopping centres and suffers from a huge leakage of comparison goods expenditure to both Belfast city centre and the Abbey Centre. Although small independent retailers provide most of the town centre shopping, a few larger retailers have recently moved into the town centre. Continued regeneration is essential to create a healthy and vibrant town centre.

ASSESSMENT OF NEED OR CAPACITY FOR RETAIL & OTHER MAIN TOWN CENTRE USES IN CARRICKFERGUS

6.3 During preparation of the Draft BMAP the Department appointed retail consultants, Colliers CRE, to assess the need for additional retail floorspace within the Plan Area up to 2015. The Study and an update carried out in 2006 are available on the Department's website www.planningni.gov.uk.

6.4 General findings of floorspace need in the comparison, convenience and bulky goods sectors were as follows:

- Considerable leakage of **comparison goods** expenditure to Belfast City Centre and Abbey Centre.
- After commitments (planning permission) were factored into **convenience goods** need assessments, calculations did not demonstrate an over or under supply of convenience goods floorspace in Carrickfergus Town Centre.
- A need was not demonstrated for additional **bulky comparison goods** floorspace up to 2015 in Carrickfergus town centre when re-assessed in 2006.
- Qualitative need was identified to provide appropriately located and configured units to attract national multiples.

6.5 However, as this information is very outdated a new assessment of need for additional convenience/comparison and bulky goods retail floorspace should be prepared for Carrickfergus town centre projecting forward.

CARRICKFERGUS TOWN CENTRE HEALTH CHECK

Retail Use

6.6 The retail floorspace within Carrickfergus town centre is estimated to be 37,486 sq.m. gross (October 2012) consisting of convenience, comparison and retail service uses. The primary retail frontages in Carrickfergus Town Centre are Market Place, West Street and North Street. The DeCourcy shopping centre is also included within this floorspace calculation.

6.7 The most recent published survey of town centre uses available is a GOAD category report generated in October 2012. Appendix D Table D1 shows a breakdown by outlet numbers and floorspace of comparison, convenience, retail services, leisure service, financial and business service sectors as well as vacancy levels. The table illustrates whether they are above or below the UK average for similar sized towns. Some of the key findings are that Carrickfergus has more children's wear and footwear retailers and less variety stores and newsagents than the UK average for similar towns. See Appendix D: Table D2 for further examples.

6.8 GL Hearn consider the retail sector in Carrickfergus as having the potential to exploit the tourism market if it is carefully marketed as a specialist/unique retail centre.

Convenience goods

6.9 The outlet counts for Convenience, Comparison and Retail Service focused on the primary and secondary shopping streets and the DeCourcy centre. Of the 177 units surveyed in Carrickfergus, convenience outlets accounted for 4.5%. Iceland, Sainsbury and Tesco are the national foodstore operators present in the town centre. Local independent food retailers mainly comprise butchers, greengrocers, and bakeries /confectioners, small convenience stores.

Comparison goods

6.10 In terms of comparison goods the range and choice within the town centre is limited. The majority of the traders are local independents and whilst some of the clothing and footwear retailers within the town centre are of good quality, the centre did not appear to be particularly viable when assessed by GL Hearn in Spring 2013. Only 23% of town centre outlets were comparison goods outlets.

Retailer Representation

6.11 Carrickfergus had 6 out of the 29 national multiples operating in Northern Ireland in 2013.

Financial and Retail Services

6.12 Financial Services including banks, building societies, financial advisors, solicitors and estate agents are found in the town centre accounted for 8.47% of all units in 2013. In terms of retail services, there is a range of opticians, travel agents, repair services and hairdressers/beauticians spread throughout the town centre. These accounted for approximately 16% of outlets.

Residential Use

6.13 The location of residential accommodation within the town centre boundary is shown on Map D1 of Appendix D. More detailed information will be forthcoming when the 2011 census data becomes available.

Leisure uses

6.14 According to the GOAD report (October 2012) there were 27 outlets within Carrickfergus town centre which fell into this category. Approximately half of these facilities consisted of cafes, fast food takeaways and restaurants, with a fairly even spread of other leisure uses like winebars, pubs, guest houses, and betting offices.

Edge of town floorspace

6.15 The Carrickfergus town centre boundary is defined by the railway track to the north and coastline/marina to the south. Most of the land adjacent to the town centre boundary is residential in use.

Vacancy

6.16 In October 2012 there were 45 vacant units accounting for 25% of all outlets in Carrickfergus town Centre, according to the GOAD category report contained in the GL Hearn study. It has however been higher at 26% in 2007. A lot of these units are long term vacant and many are in a poor state of repair.

Footfall

6.17 GL Hearn observed pedestrian flows in Carrickfergus town centre in April/May 2013. The survey noted very limited pedestrian/shopper activity even on the main shopping streets. The limited footfall in the centre impacts upon the overall viability of the town as a trading location. Whilst the Sainsbury store and carpark were busy GL Hearn did not observe any significant pedestrian flow between Sainsbury and the town centre.

Accessibility

6.18 The town centre is located off the Belfast Road and is easily accessible. There is ample surface car parking and some on street 'in-bay' spaces provided. Buses whilst available did not appear to be used that much by shoppers when assessed by GL Hearn in Spring 2013. The train station is located within the town centre. Pedestrian movement between the castle/marina and the town centre is adversely effected by the Marine Highway which represents a significant physical barrier. The Carrickfergus Town Centre Masterplan proposed improving linkages for pedestrians and cyclists to the town centre. A car parking strategy was also suggested.

Environmental Quality

6.19 As Carrickfergus town centre falls within a designated Conservation Areas, environmental quality is of a reasonably high standard. An Environmental Improvement scheme was carried out in 2012. The scheme which attracted almost £2.4 million of investment from the Department for Social Development and was completed in February 2013. The environmental works have helped to reduce the dominance of cars within the town centre and reduced the potential for vehicular/pedestrian conflict. Shop units are all relatively well maintained although some longer term vacant units detract from the overall street scene.

Carrickfergus Town Centre Issues

Strengths/Opportunities	Weaknesses/ threats
+ Availability of Town centre parking provision.	– Significant vacancies & potential obsolesce of some floorspace.
+ Good accessibility & public transport to get to town.	– Poor level of retailer representation in all sectors including national multiples
+ Environmental Quality	– Low footfall generally
+ Potential to exploit tourism spend if marketed as a specialist unique retail centre, given the historic setting.	– Separation of the town centre from the waterfront /Castle area by the Marine Highway

Summary

6.20 In summary, the key findings from these town centre studies are as follows:

- The town centre has a limited diversity of shops, retail services, offices and other businesses.
- The potential to attract significant tourist spend in this coastal location needs to be fully exploited.
- Closer examination of vacancy rate is required to get a clear picture of trends and reasons for long term vacancy.

CARRICKFERGUS TOWN CENTRE OPPORTUNITY SITES

Draft Belfast Metropolitan Area Plan

6.21 Draft BMAP had designated 9 Development Opportunity Sites, (CS33-CS41) within Carrickfergus Town Centre.

6.22 Some of the these, most notably the Tesco site have been developed. However, given the uptake of draft Development Opportunity Sites during the time lapse between publication of the draft and adopted BMAP (so far as it addresses Carrickfergus) and following recommendations in the PAC report, the Department removed all Development Opportunity Site designations, considering DSD to be best placed to pursue town regeneration objectives through their Masterplan.

Carrickfergus Town Centre Masterplan

6.23 This document focuses on 4 discrete areas within which development opportunities are identified.

6.24 **The Walled Town** – Proposals include creation of public places at Bastion and Lancasterian Street and improvement of Market Square as well as reconfiguration of streets/ shopping areas to provide frontages onto the town walls.

6.25 **The Waterfront** – A major redevelopment scheme is proposed on the peninsula, retaining all existing land uses and adding others, so to comprehensively enhance the quality of this environment and creating a new, vibrant waterfront quarter, centred around an extension to Davy street to form a spine road to the end of the peninsula creating a series of perimeter blocks with active frontage on the outside and parking to the inside.

6.26 **Irish Quarter** - A range of development and public realm proposals are recommended in the Masterplan. Mixed use development is proposed at Irish Quarter West and Davy Street.

6.27 **Scotch Quarter** – By constructing a new railway bridge, potential exists to join Shaftsbury Park with the grounds of the leisure centre and football club, which would create a larger park and better linkages to the town centre. An opportunity for frontage development from properties to the south and west, would greatly improve Shaftsbury Park also.

6.28 The Masterplan recognises that although each area has its own distinctive history and character, it is important that they are not treated as separate entities, in line with the concept of a cohesive town centre.

OVERALL CONCLUSIONS & KEY FINDINGS

A key role for a Local Development Plan is to support and sustain vibrant town centres. Town centres should not be viewed simply as destinations for shopping but also places providing a wide range of uses to attract people into them. This includes cultural, community, residential, retail, leisure, public/open space, entertainment and businesses.

Recent studies have established that Ballymena town centre has a sub-regional role with a diverse range of retail and service uses, although clearly there is room for improvement particularly in commercial leisure market and the convenience retail offer which has suffered from out of town competition. These studies have also indicated that a reduction in pedestrian/vehicle conflict together with ongoing environmental improvements to the public realm are necessary to attract more people into the town centre.

Larne has an important role as a gateway to Northern Ireland. However, the town centre also has a local role in offering a reasonable range of retail and related services. Retailing would be further enhanced by additional national multiples and bulky goods offer. There is also a need for family orientated commercial leisure in the town centre. Potential tourism spend should be exploited given the constant through flow at the ferry port.

Carrickfergus is within the BMA with a retail and general services role. In order to ameliorate competition from nearby larger centres, consideration should be given to developing a niche tourism orientated retail and leisure offer. The severance caused by the Marine Highway needs to be addressed so as to fully exploit the potential for enhanced tourism benefit.

LDPs are required, by the SPPS to include a Retail Strategy and contain appropriate policies and proposals that must promote town centres first for retail and other main town centre uses. Accordingly the retail strategy of the Plan must ensure that retail growth remains focused in these centres. That said, the need for some provision in the small towns, villages and at local level is also recognised, as this can complement the offer provided by main town centres. Thus, opportunities for small scale growth which helps meet the daily shopping needs of local residents and add to the vitality of the small towns and villages through the creation of local services such as financial/professional services and cafes and restaurants, should be encouraged.

These considerations will require the LDP Retail Strategy to not only promote the vitality and viability of town centre's but also to bring forward an appropriate retail hierarchy across the district. The main elements of such a hierarchy could include the following: -

- **The Hubs/Main Town Centres** – the principal focus for new retail, commercial and leisure activities providing a broad range of facilities and services.
- **Local Town Centres** – local service centres important for meeting both the daily and weekly needs of surrounding residents.
- **Village Centres** – provide a small number of shops and services, including at least one food shop, a post office, and are important for meeting the daily of shoppers.
- **Neighbourhood or Local Centres** – small groupings of shops, typically comprising a general grocery store, a sub-post office, occasionally a pharmacy and other small shops of a local nature.

As the Local Development Plan progresses, members' views will be sought on how the Plan should facilitate continuous improvement in the health of the town centres as well as defining an appropriate retail hierarchy for the district.

RECOMMENDATIONS

Members are asked to agree to the need to update the Retailing and Town Centre evidence base so as to inform the Preferred Options, Plan Strategy and Local Policies Plan elements of the Local Development Plan.

The following information is required:

- A retail capacity study and town centre health check, incorporating retailer and shopper surveys, will be needed for each town centre. This will provide Council with essential up to date information on existing retail patterns and floorspace provision as well as an expert assessment of the future retail and other town centre needs over the plan period;
- Advice concerning an appropriate retail hierarchy across Mid and East Antrim District;
- This work will require the engagement of retail consultants as the expertise is not available within the Development Plan Team.