

Mid & East Antrim – Retail Hierarchy

Introduction

Nexus Planning has been engaged by Mid & East Antrim Borough Council to prepare the Mid & East Antrim Retail and Leisure Study 2032. As a standalone exercise for that Study, we have undertaken a review of the proposed Retail Hierarchy as published in the Preferred Options Paper (POP), as well as an independent assessment of each centre within the Borough. Through this assessment we are able to provide a set of recommendations relating to the future retail hierarchy to be incorporated into the LDP.

Policy Background

Strategic Planning Policy Statement

The Strategic Planning Policy Statement (SPPS) identifies that LPAs must define a network and hierarchy of centres for the purposes of retail planning. This retail hierarchy is different to the settlement hierarchy which is also required to be defined.

The most relevant parts of the SPPS, Paragraphs 6.277 – 6.278, have been included below for reference:

6.277 LDPs should also:

- *define a network and hierarchy of centres – town, district and local centres, acknowledging the role and function of rural centres;*
- *define the spatial extent of town centres and the primary retail core;*
- *set out appropriate policies that make clear which uses will be permitted in the hierarchy of centres and other locations, and the factors that will be taken into account for decision taking;*
- *provide for a diverse offer and mix of uses, which reflect local circumstances; and*
- *allocate a range of suitable sites to meet the scale and form of retail, and other town centre uses.*

6.278 Policies and proposals for shops in villages and small settlements must be consistent with the aim, objectives and policy approach for town centres and retailing, meet local need (i.e. day-to-day needs), and be of a scale, nature and design appropriate to the character of the settlement.

Planning Policy Statement 5: Retailing and Town Centres

Planning Policy Statement 5 (PPS5) is the previous development guidance for retail development and town centres in Northern Ireland. PPS5 has been superseded by the SPPS. Whilst the SPPS refers to district and local centres as components of the network and hierarchy of centres, it is silent in regard to the definition of these entities. Accordingly, for the purposes of the LDP, it is assumed that the previous definitions contained in the former PPS 5 remain valid. Specifically, the definitions for Town Centres, District Centres and Local Centres are still valid. These definitions are included below for reference:

Town Centre: City centres and town centres which provide a broad range of facilities and services and which fulfil a function as a focus both for the community and for public transport

District Centre: Groups of shops, separate from the town centre, usually containing at least one food supermarket or superstore and non-retail service uses such as banks, building societies and restaurants.

Local Centre: 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.

Mid & East Antrim Preferred Options Paper

The Mid & East Antrim (MEA) POP identifies a proposed retail hierarchy classification consisting of a 5 tier system including Main Town Centre, Small Town Centres, Village Centres, District Centres, and Local Centres.

The POP acknowledges a desire to largely align the proposed retail hierarchy with the proposed settlement hierarchy, which consists of Main Towns, Small Towns, Villages and Small Settlements. The proposed retail hierarchy includes the same Main Towns, Small Towns and Village Centres as the settlement hierarchy, but excludes Small Settlements, and includes additional tiers for District Centres and Local Centres. The proposed classification table is included at Figure 1:

Figure 1 | Proposed Classifications for the Retail Hierarchy of Centres, MEA POP (June 2017)

Tier	Classification	Role
Tier 1	Main Town Centre	A large range of shops, businesses and community facilities to serve a significant hinterland which includes smaller neighbouring towns. Could include shopping centres, retail warehousing, a range of restaurants, a leisure centre with pool, visitors/tourism centre, advice centre, arts and culture centre.
Tier 2	Small Town Centre	A range of shops businesses and community facilities to serve a hinterland which includes neighbouring villages.
Tier 3	Village Centre	A limited range of shops, generally comprising a grocery store, occasionally petrol filling station and other small shops of a local nature.
Tier 4	District Centre	A localised area with a group of shops, separate from the town centre, usually containing at least one food supermarket or superstore and non-retail services such as banks, bars and food outlets.
Tier 5	Local Centre	A localised area having a small grouping of shops, generally comprising a general grocery store, a sub-post office, occasionally a pharmacy and other small shops of a local nature.

As part of this hierarchy exercise, we have reviewed the SPPS and the proposed retail hierarchy options as identified in the POP. The preferred retail hierarchy of centres, as published in the POP is included in Figure 2.

Figure 2 | Preferred Option for Retail Hierarchy of Centres, MEA POP (June 2017)

Hierarchy of Centres				
Main Towns	Ballymena Carrickfergus Larne			
Small Towns	Greenisland Whitehead Ahoghill	Broughshane Cullybackey Portglenone		
Villages	Cargan Clough Kells/Connor	Martinstown Ballycarry Ballygalley	Ballystrudder Camlough Glenarm	Glynn
District/Local Centres	Braidwater Retail Park (Ballymena) Galgorm (Ballymena) Harryville (Ballymena) Redlands (Larne) Larne town centre south of Harbour Highway Waterfront Marina (Carrickfergus)			

Assessment of Centres

Nexus has been asked to comment on the hierarchy proposed in Figure 2. We are able to assist in this as we have up-to-date market share and town centre composition information. Whilst there is no set methodology for defining a retail hierarchy we have utilised our empirical evidence to assess a range of criteria which we feel provides a suitable basis for supporting the proposed hierarchy.

Figure 3 provides an assessment of each relevant centre within the Borough. Descriptors that have been chosen include population, number of units, comparison and convenience goods market share, convenience goods provision, and community services provision. These indicators provide a quantitative assessment of each centre.

Population data was sourced from Census 2011 Headcount and Household Estimate for Settlements, while information regarding the number of retail units and community facilities was gathered through a combination of MEA Borough Council records, Nexus Planning site visits, and desktop research. The comparison and convenience goods market share information is based on results from the NEMS Household Survey (March 2018), which surveyed the shopping habits of 800 residents across the Borough and the surrounding fringes.

This assessment should confirm whether the proposed retail hierarchy of centres, as published in the POP, is appropriate, and whether any amendments should be made.

Figure 3 | MEA Centres: Characteristics Informing Proposed Retail Hierarchy

Centre	Population ¹	Units (#) ²	Comparison Goods Market Share (%) ³	Convenience Goods Market Share (%) ⁴	Community Services	Primary Convenience offer ⁵
Ballymena	29,467	605	39.8	6.0	Community Centre Leisure Centre Library	Co-op, Iceland, Lidl, M&S
Carrickfergus	27,903	247	3.6	19.7	Community Centre Leisure Centre Library	Sainsbury's, Tesco Extra, Iceland
Larne	18,705	290	9.1	2.0	Community Centre Leisure Centre Library	Lidl, Tesco Express
Greenisland	5,484	9	-	-	Community Centre Library	Small convenience store
Whitehead	3,786	22	0.1	-	Library	Small convenience store
Ahoghill	3,403	20	0.5	-	Community Centre	Small convenience store, just outside

¹ Population data sourced from Census 2011 Headcount and Household Estimate for Settlements. Population is used to give an indication of the size of the town only.

² Number of units data sourced from a combination of MEA Borough, site visits and desktop research. Inclusive of convenience, comparison, retail services, leisure services, financial and business services and vacant units.

³ Comparison Goods Market Share derived using NEMS Household Survey data 2018 & Experian data, 2018

⁴ Convenience Goods Market Share derived using NEMS Household Survey data 2018 & Experian data, 2018

⁵ A broad description of the primary convenience offer in each town has been provided. Usually, this accounts for the main supermarkets or convenience stores within the town centre boundary, but does not represent a comprehensive list of all convenience units in each case.

Centre	Population ¹	Units (#) ²	Comparison Goods Market Share (%) ³	Convenience Goods Market Share (%) ⁴	Community Services	Primary Convenience offer ⁵
						settlement limit
Broughshane	2,851	16	0.2	0.9	Community Centre Library	Small convenience stores
Cullybackey	2,569	15	0.1	0.1	Community Centre	Small convenience store
Portglenone	1,174	33	0.2	2.1	Community Centre Library	2x medium convenience stores
Kells/Connor	2,053	9	0.1	0.9	Community Centre Library	Small convenience store
Carnlough	1,512	10	0.1	0.3	Community Centre Library	Small convenience store
Ballycarry	1,371	5	-	-	Community Centre	No
Ballystrudder	992	2	-	-	Community Centre	Small convenience store
Ballygalley	818	2	-	-	-	Small convenience store
Glynn	632	2	-	-	Community Centre	Small convenience store
Cargan	588	2	-	-	-	Small convenience with PFS
Glenarm	564	5	0.1	0.1	Community Centre	Small convenience store
Martinstown	345	2	-	-	-	Small convenience store
Clough	279	1	-	-	Community Centre	Small convenience store
Braidwater Retail Park (Ballymena)	n/a	13	4.2	7.1	-	Sainsbury's
Galgorm (Ballymena)	n/a	15	0.3	0.5	Community Centre	Small convenience store
Harryville (Ballymena)	n/a	20	-	-	-	No
Redlands (Larne)	n/a	8	-	11.6 (Asda)	-	Asda
Larne Town Centre south of Harbour Highway	n/a	15	-	-	-	No
Waterfront Marina (Carrickfergus)	n/a	11	-	4.6%	-	Sainsbury's

Discussion of Retail Hierarchy

Our independent assessment contained in Figure 4 assigns the various MEA centres to specific tiers in a retail hierarchy that is largely, but not wholly based on the proposed retail hierarchy as published in the POP, SPPS guidance and former PPS5 definitions. These tiers are Town Centres, Small Town Centres, Local Centres and Village Centres. A description of each tier has been provided for each grouping based on our initial analysis of the centres, and a review of SPPS and former PPS5 definitions. In each case, the relevant centre meets the majority of the defining characteristics identified in the description for the particular tier of the settlement hierarchy.

Figure 4 | Retail Hierarchy Based on Nexus Assessment

Tier	Title	Description	Centres
1	Town Centres	Provides (or has the potential to provide) a range of shops, services, businesses and community facilities to a significant hinterland which includes smaller neighbouring towns or suburbs.	Ballymena Carrickfergus Larne
2	Small Town Centres	Provides (or has the potential to provide) a range of shops, services, businesses and community facilities to serve a hinterland which includes neighbouring small towns and villages.	Whitehead Ahoghill Broughshane Cullybackey Portglenone ¹
3	Local Centres	Provides (or has the potential to provide) a limited range of shops, services, businesses and community facilities to serve the immediate local area.	Greenisland ² Galgorm
4	Village Centres	Provides (or has the potential to provide) a limited range of shops, generally comprising a grocery store, occasionally a petrol filling station, and other small shops of a local nature serving a small village and surrounding rural area.	Kells/Connor Cargan Carnlough Clough Martinstown Ballygalley Ballystrudder Glenarm Glynn Ballycarry

¹ While Portglenone is included in Tier 2 – Small Town Centres in the recommended Retail Hierarchy, it is proposed as a Village in the LDP Settlement Hierarchy.

² While Greenisland is included in Tier 3 – Local Centres in the recommended Retail Hierarchy, it is proposed as a Small Town in the LDP Settlement Hierarchy

Tier 1 – Town Centres

Ballymena is the major town centre within MEA Borough, and has more than double the number of units of both Carrickfergus and Larne, and accounts for almost 40% of the comparison goods market share of the Borough. Ballymena has comprehensive community facilities including community centre, library and leisure centre.

Larne and Carrickfergus are also major centres within the Borough, particularly in regard to population, the overall number of units and their comparison goods market share. All three towns have full provision of community service (community centre, library and leisure centre) which are each of a similar standard in all three locations.

Ballymena, Carrickfergus and Larne all provide a broad range of services and facilities that provides a function as a focus for both the community and for public transport, as per the definition of town centres in the former PPS5.

Tier 2 – Small Town Centres

In the POP, Greenisland, Whitehead, Ahoghill, Broughshane, Cullybackey and Portglenone are grouped together in the second tier of the proposed settlement hierarchy, as small towns. These town centres each have a small grouping of shops, typically between 15-30 units, including convenience store or supermarket and a range of other local services. Each of the small town centres also offers community facilities including at least one of a community centre and library, and in the cases of Portglenone and Broughshane, both.

Portglenone is of particular interest, as it has a smaller population than the other small towns in the settlement hierarchy, but a larger, more comprehensive array of shops and services. A market share of both convenience and comparison goods has been identified. In this respect we had considered that Portglenone could be elevated to a higher tier, however for the purposes of this Study feel that Portglenone could equally remain grouped with the other small towns as identified in the settlement hierarchy.

The exception in this category is Greenisland, which, despite being categorised as a small town in the settlement hierarchy, has a very limited offer of shopping facilities, services and no real sense of 'centre'. Only 9 retail units were identified, and as a result, we have recommended that Greenisland be included in Tier 3 (Local Centre) of the retail hierarchy.

Tier 3 – Local Centres

In addition to Greenisland, we have identified that Galgorm should also be considered to be a local centre. Galgorm is a neighbourhood within the main town of Ballymena. It is located outside of the town centre, but within the settlement boundary. It contains 15 retail units. Galgorm accounts for a small market share of both convenience and comparison goods spend and has its own community centre. The centre consists of a range of shops of a localised nature, in line with the PPS5 definition of 'Local Centre'.

Tier 4 – Village Centres

The final tier of the retail hierarchy is village centres, which align with the settlement hierarchy. For the most part, each of these centres generally has between 1-5 retail units and consists of small convenience store or petrol filling station and a public house. Cargan, Clough, Martinstown, Ballygalley, Ballystrudder, Glenarm, Glynn and Ballycarry all fit this bill.

Kells/Connor and Carnlough are included in the village tier of the proposed settlement hierarchy. They have 9 and 10 units respectively, a recognised market share (albeit small), and a community centre and library. While both these centres could potentially be elevated to Local Centres when considering their retail offer, they are both villages and therefore are well placed in the Village Centre tier.

While we have not included Small Settlements (as identified in the Settlement Hierarchy) in our assessment of centres, the Council may wish to include these here in Tier 4. In this case, Tier 4 could be named 'Village Centres and Small Settlements'. Including small settlements within the tier would result in future small scale retail development in these small settlements having a grounding in policy.

Recommendations

Based on the assessment and discussion above, we have provided a recommended retail hierarchy of centres as set out in Figure 4. This recommended retail hierarchy of centres has been prepared based on a review of MEA's POP, the SPPS and the Council's consideration of the applicability of definitions relating to aspects of the retail hierarchy as set out in the former PPS5.

While the preferred option identified in the POP was designed to largely align with the proposed settlement hierarchy, the assessment undertaken by Nexus identifies that practically, the retail hierarchy of centres deviates slightly from the proposed settlement hierarchy. The recommendation is for a four tier retail hierarchy of town centres, small town centres, local centres and village centres. Since none of the centres in MEA Borough falls within the definition of a district centre, it is recommended that this tier is omitted from the LDP retail hierarchy.

We do not recommend that an additional category for out-of-centre retail locations is included in the retail hierarchy.