

Mid & East Antrim

Retail & Commercial Leisure Need & Capacity Study

on behalf of Mid & East Antrim Borough Council

January 2019

Final Report

Contact

1 Poultry
London
EC2R 8EJ

T: 020 7261 4240

E: info@nexusplanning.co.uk

Job reference no: 33199

Contents

1.0 Introduction 1

2.0 Policy Review & Market Trends 3

3.0 Town Centre Assessment..... 23

4.0 Retail & Leisure Capacity Assessment..... 64

5.0 Policy & Proposals Guidance 82

Glossary of Terms..... 94

Appendices

- Appendix A | Study Area Map
- Appendix B | Household Survey Results
- Appendix C | Land Use Maps
- Appendix D | Tables
- Appendix E | Retail Hierarchy Assessment Paper

1.0 Introduction

Instruction

- 1.1** Nexus Planning was commissioned by Mid & East Antrim Borough Council (the Council) in February 2018 to undertake a Retail and Commercial Leisure Need and Capacity Study for the Borough.
- 1.2** The Mid and East Antrim Retail and Commercial Leisure Need and Capacity Study will form part of the evidence base upon which the emerging Mid & East Antrim Local Development Plan 2030 will be established. The approach adopted by Nexus and the brief provided by the Council, has been refined to reflect the latest Government guidance provided in the Strategic Planning Policy Statement (SPPS) 2015.
- 1.3** The detailed scope of works has been separated into seven overarching elements of the Study, as detailed in the brief. Five of those are specifically relevant to this written report:
- Review Policy and Market Trends;
 - Retail and Leisure Capacity Assessment;
 - Assessment of Need for Additional Retail and Leisure Floorspace;
 - Undertake Town Centre Health Checks; and
 - Policies and Proposals Guidance.
- 1.4** This Study is supported by new empirical research, with NEMS Market Research Limited (NEMS) undertaking surveys of 800 households within a defined Study Area in February 2018. The Study Area for the household survey encompasses eight zones in total, six of which roughly cover the Borough area. For each zone, 100 surveys were undertaken. The zones were identified based on postcode sectors grouped to reflect areas that are expected to exhibit similar patterns of shopping behaviour.
- 1.5** To complete this Study, Nexus has examined land use data provided by the Council. Nexus has also referred to the latest NISRA and Experian population and expenditure data in order to establish the up-to-date position with regard to convenience retail, comparison retail, and leisure capacity.

Structure of the Report

1.6 The remainder of the report is set out in the following chapters:

- **Chapter 2** | a review of relevant planning policy, and an investigation of past, present and forecast retail and market trends and consumer behaviour;
- **Chapter 3** | details our qualitative and quantitative analysis of the key centres within Mid & East Antrim; Ballymena, Carrickfergus and Larne, including a health check assessment to assess the vitality and viability of town centres, as well as a quantitative analysis of market shares. Furthermore, we compare the town centre composition of the three main towns against other comparable centres in Northern Ireland and England;
- **Chapter 4** | provides an assessment of current convenience, comparison and leisure floorspace capacity across the Borough, and capacity forecasts to 2022, 2026 and 2030, based on population growth and expenditure growth rates; and
- **Chapter 5** | provides recommendations and example policy and proposals guidance to inform the emerging Plan Strategy of the Local Development Plan.

2.0 Policy Review & Market Trends

Introduction

- 2.1** Nexus has reviewed recent research completed by a number of retail research providers, including but not limited to Colliers International, Office for National Statistics (ONS), Experian, and Verdict. Through the analysis of this research, we can ascertain information on recent trends and future forecasts for the Northern Irish and wider UK retail and leisure market.
- 2.2** In addition to analysing current past, present and future retail trends, it is also important to understand the planning policy context of the local authority area.

Planning Policy Context

- 2.3** Mid and East Antrim Borough Council (the Council) is preparing a Local Development Plan (LDP) for its Borough in accordance with its statutory duty under the Planning Act (Northern Ireland) 2011. When adopted in full, the new LDP will replace the following extant Area Plans relating to the three legacy Councils:
- Ballymena Area Plan 1986 – 2001
 - Larne Area Plan 2010
 - Belfast Metropolitan Area Plan (BMAP) 2015¹ (insofar as it relates to the former Carrickfergus Borough Council area) / Carrickfergus Area Plan 2001
- 2.4** The main purpose of the new LDP is to inform the general public, statutory authorities, service providers, developers and other interested parties of the policy framework and land use proposals that will guide decisions on planning applications for development in Mid and East Antrim (MEA) until 2030.
- 2.5** The new LDP is a two stage process and will comprise two development plan documents, namely:

¹ BMAP remains unadopted following the Court of Appeal's decision in May 2017.

- The Plan Strategy
- The Local Policies Plan

2.6 This Study will inform the preparation of the LDP.

MEA Preferred Options Paper

2.7 The Preferred Options Paper (POP) identifies a series of strategic issues and alternative options relevant to the Plan area and is intended to promote public debate on these matters. The POP was published on 14th June 2017 for a period of 12 weeks consultation, ending on 6th September 2017.

2.8 The POP sets out a Vision and series of Plan objectives many of which reflect themes in the Council's Community Plan and the priorities of its Corporate Plan. It sets out a Proposed Spatial Growth Strategy which is underpinned by a proposed revised settlement hierarchy and supported by sectoral growth strategies relating to housing, economic development and retailing. The POP then sets out strategic issues under five key themes to be addressed in the LDP, as follows:

- Sustainable Economic Growth
- Building Sustainable Communities
- Transportation, Infrastructure and Connectivity
- Stewardship of our Built Environment and Creating Places
- Protecting and Accessing our Natural Environment

2.9 In terms of the future retail and town centres policy within the Borough, the POP identifies the Council's future retail strategy and preferred option for retail hierarchy.

Current Retail Picture Overview

2.10 The economic climate that prevailed during the most recent economic recession (circa 2008 to 2013) had substantial impacts on the retail market by restricting resident incomes and changing the way people spend. As a consequence, the level of spending retracted. Since 2013 (recognised as being the end of the recession in the UK), the economy slowly regained momentum and economic reports

released in early 2016 indicated a return to pre-recession levels of economic activity. The Brexit vote and subsequent triggering of Article 50, is though expected to dampen business and consumer confidence and the prospects for significant growth in the near future.

- 2.11** During 2017 the consumer economy tightened, with rising inflation and slowing wage growth. Experian reports that 2017 saw the UK shift from being one of the fastest growing G7 economies to one of the slowest². The ongoing uncertainty around Brexit and the 2017 general election only exacerbated the uncertain environment. However, in their Midsummer Retail Report 2017, Colliers International recognised that headline figures from the UK retail property sector are, on the face of it, positive with prime rents up 1.8% year-on-year – the largest increase since 2008³. Overall, prime vacancy has decreased by 0.2%, the first positive nationwide movement since 2014. The Office of National Statistics (ONS) has estimated that the UK economy grew 0.4% in Q4 of 2017⁴.
- 2.12** The Northern Ireland Composite Economic Index (NICEI) results⁵ show that NI economic activity was estimated to have increased by 0.4% in real terms from Quarter 3 (July – September) 2017 to Quarter 4 (October – December) 2017. However, the index decreased by 0.2% over the year to Quarter 4 2017.
- 2.13** While overall the economy has grown, consumer confidence is the lowest it has been since the Brexit vote of June 2016, and household incomes have suffered as a result of inflation and a decrease in median weekly earnings for full-time employees. Consequently, consumer spending power has been limited. Alongside this, companies are continuing to hold back on investment decisions in the wake of Brexit negotiations. The recent administration of Maplin and closure of Toys R Us serve to demonstrate the significant structural issues in the retail investor market.

² 'Retail Planner Briefing Note 15', Experian, December 2017

³ 'Midsummer Retail Report', Colliers, August 2017

⁴ 'Second Estimate of GDP: October to December 2017, ONS, 22 February 2018

⁵ NI Composite Economic Index, NISRA, 12 April 2018

The Labour Market and Wages

2.14 In April 2017, median gross weekly earnings for full-time employees in the UK were £550, up 2.2% from £539 in 2016⁶. However when adjusted for inflation, full-time workers' weekly earnings decreased by 0.4% compared with 2016. This is the first time since 2014 that there has been a fall in this measure which reflects a higher level of inflation in April 2017 (2.6%). For Northern Ireland, the median full-time gross weekly earnings were £501, up 1.5% from the previous year.

2.15 Domestic economic drivers of positive UK retail performance are linked to two key factors:

- (1) Low inflation – drives growth in real wages, strengthens household confidence and disposable income; and
- (2) Low interest rates – lead to low mortgage rates, which in turn results in more money in the pockets of borrowers.

Conversely, high inflation and high interest rates would lead to poor UK retail performance.

2.16 Each of the factors set out above have a significant impact on the public's general confidence, and in turn their tendency to spend their earnings on retail goods. Since the year 2010, taxation rates and levels have increased (including VAT, national insurance contributions, and capital gains tax). As a direct result of these increases, consumers' spending power reduced year-on-year in the period to 2016, impacting upon households' spending.

2.17 Employment rates (the proportion of people aged from 16 to 64 who were in work) across the UK offer a more positive outlook. The employment rate for the period August to October 2017 was 75.1%, lower than for the period between May to July 2017 (75.3%) but higher than for a year earlier (74.4%)⁷. The May to July rate was the highest rate since records began in 1971. The unemployment rate for the UK was recorded as being 4.3% at October 2017 down from 4.8% for a year earlier and the joint lowest since 1975.

⁶ 'Statistical bulletin: Annual Survey of Hours and Earnings: 2017 Provisional Results', ONS, 26 October 2017

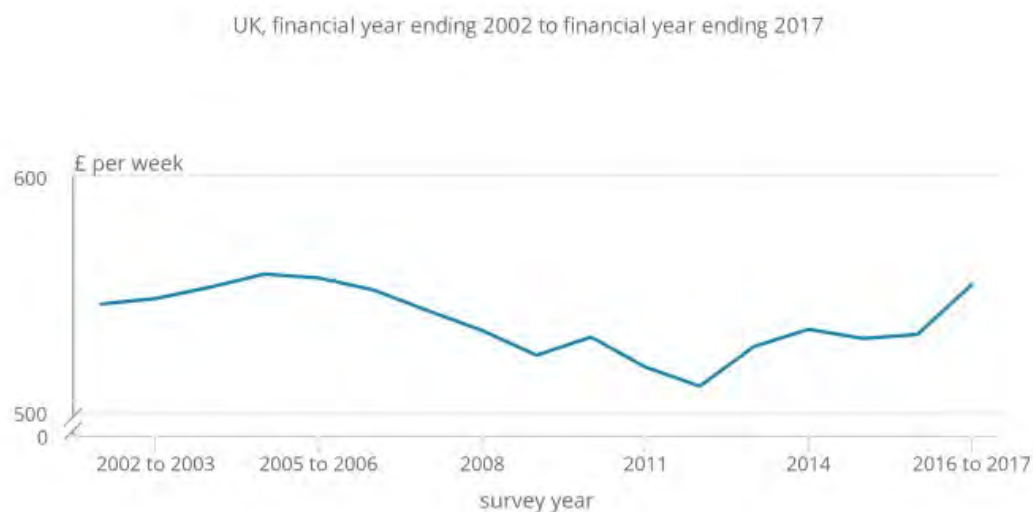
⁷ 'UK Labour Market' ONS, 13 December 2017

2.18 In terms of gender pay gap, this has decreased for all UK countries since 1997. In 2017, England had the highest gender pay gap, of 10%. In recent years the gender pay gap for full-time employees in Northern Ireland has been below 0%, that is, women earn more, on average, than men. This is, in part, due to a higher proportion of public sector jobs here than in the rest of the UK. There are more women employed in this sector than men and these jobs tend to be higher-paid, in general, than in the private sector.

Household Spending

2.19 In a turning of the tide, the ONS reported that total average weekly household spending across the UK rose to £554.20 in the financial year ending (FYE) 2017⁸. The total average weekly spending for households in Northern Ireland is £497.10. After adjusting for inflation, household spending has not been this high since the FYE 2006. It is also a rise of £21.20 in real terms when compared with the previous year. Figure 2.1 indicates that following the 2008 economic downturn, and subsequent period of uncertainty, total household expenditure per week returned to pre-recession levels at FYE 2017.

Figure 2.1 | Total household expenditure at financial year ending 2017



Source: Family spending in the UK: financial year ending 2017, ONS, 18 January 2018

⁸ 'Family spending in the UK: financial year ending 2017', ONS, 18 January 2018

2.20 Figure 2.2 shows the actual growth and forecast growth in retail and leisure spending per head as identified in the Experian's Retail Planner Briefing Note 15⁹.

Figure 2.2 / UK Retail and Leisure Spend per Head 2008-2036

Vol Growth per head (%)	Actual Growth								Forecast			Trends		
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020-24	2025-36
Retail spend	2.0	-2.8	0.7	-1.1	1.3	1.9	2.1	2.8	3.5	1.4	0.4	1.2	2.2	2.3
Convenience goods	-4.2	-4.2	-0.6	-3.3	-0.2	-0.3	-0.3	-1.0	1.0	0.0	-0.6	-0.2	0.1	0.1
Comparison goods	4.4	-2.9	1.4	0.1	2.3	3.5	3.6	5.2	5.0	2.3	0.9	2.1	3.2	3.2
Leisure	-2.9	-9.7	0.1	0.1	1.0	0.7	0.2	1.7	0.7	0.3	-0.1	0.8	1.1	1.2

Source: Experian Retail Planner Briefing Note 15, December 2017

2.21 Figures published in Experian's Retail Planner Briefing Note 15 identify steady growth in overall retail spending per head since 2012 coming to a head in 2016 at 3.5%. The forecast is slightly weaker, with Experian predicting growth of 1.4% in 2017, 0.4% in 2018 and 1.2% in 2019.

2.22 As Figure 2.2 shows, there has been negative annual growth in convenience goods expenditure since 2008 and this is forecast to continue into 2018 (-0.6%) and 2019 (-0.2%). This negative growth is due in part to falling prices of convenience goods, particularly in relation to the increasing market share of discounters such as Aldi and Lidl.

2.23 For the periods 2020-24, and 2025-36 Experian forecast limited growth per annum (0.1%) in convenience spending.

2.24 Comparison goods expenditure on the other hand has remained positive since 2010, peaking in 2015 (5.2%) and 2016 (5.0%). This growth is however forecast to weaken into 2018 (0.9%) and 2019 (2.1%). Predicted trends between 2020-24 and 2025-36 show positive annual growth of 3.2% for comparison goods.

⁹ 'Retail Planner Briefing Note 15', Experian, December 2017

- 2.25** At FYE 2009, at the height of the economic recession, growth in spending on leisure was at -9.7%. Spending recovered to some extent the following year, recording growth of 0.1%, and continued to be positive between 2010 and 2016. The forecast growth for leisure spend is positive again for 2017 (0.3%), falls in 2018 (-0.1%) and is forecast to improve again in 2019 (0.8%). The longer term forecast identifies that leisure spending will remain low but steady between 2020-24 (1.1%) and 2025-36 (1.2%).
- 2.26** Households in Northern Ireland spent 13% of their total expenditure on food and non-alcoholic drinks, compared with the UK average of 11%. One reason for this is that the average Northern Ireland household size is larger than the UK average. Cultural differences may also be a factor here, where households in Northern Ireland consider items such as good quality cuts of meat to be more of an essential food item compared with those in England. Northern Ireland households also spent a higher proportion of total expenditure on restaurant and café meals and take-away meals when compared with England, Wales and Scotland.

Retail Property Market

- 2.27** As with the retail market, the retail property landscape in the UK has dramatically developed over the last 50 years. The post-war years saw a significant redevelopment effort focused on town centres. However, in more recent times, and most notably during the 1990s, the retail landscape changed following the introduction of retail warehouse parks and large out-of-town regional shopping malls. However, new retail development is once again becoming more focused on town centre locations and a shift back to traditional High Streets.
- 2.28** In 2011 Colliers reported that economic conditions were resulting in significant structural changes to the UK high street, with many retailers displaying signs of caution by decreasing the size of their property portfolios, completely abandoning weaker towns and putting a concerted effort into acquiring sites in city centres and major regional shopping centres¹⁰. At this time, comparison goods retailers were finding it increasingly difficult to justify being represented in every town centre in the UK. However, the general consensus across retail commentary, is that there is a more positive picture for high street retail in the future. Most notably, Colliers declared in 2015 that high streets are 'no longer

¹⁰ 'Great Britain Retail: Autumn 2011', Colliers, 2011

dead or dying'. Representative of this is the fact that in 2014 investment into high street assets jumped by circa 30% to £2.39 billion¹¹.

- 2.29** It is important to remember that despite pressure from a growing internet shopping market and continued investment in shopping centre developments, 80% of retail spend still happens within High Street shops¹². Across the country, local groups and Business Improvement Districts (BID) are making a concerted effort to ensure the viability and vitality of their High Streets.
- 2.30** In terms of current vacancy rates, the UK average proportion of vacant units in town centres as at January 2018, was identified by Experian as 11.2%¹³. In NI the average proportion of vacant units in town centres was 18.1%¹⁴. The rate of vacancies is described by Colliers as being 'stubbornly high' as it is not typical or reflective of the total economic or retail climate. Colliers explain that, in light of recent advances in the performance of the UK economy, it should have improved a lot more against its 2012 peak of 16.3%.
- 2.31** Overall vacant floorspace in the UK fell from 9.7% to 9.5% between April 2016 and April 2017. This represented the first annual reduction since 2014. However as at May 2018, the vacant floorspace across the UK had increased to 9.9%¹⁵. While on the face of it this appears to be positive, it is tempered with a long-term level of persistent vacancies, which continues to be of concern. It is important to distinguish that this high level of vacancy is driven mainly by non-prime units. Colliers identify, in their Midsummer Report, that the prime unit vacancy rate (floorspace) sits around 5.4% while non-prime is as high as 12.8% as at April 2017. In Northern Ireland, vacant floorspace represented 30.6% of all retail floorspace in April 2017. This figure is substantially worse than the figure UKwide.
- 2.32** In short, the continually high average vacancy rate, despite improving economic conditions, is representative of a discernible divergence between in-demand high quality units and lack of demand for secondary premises in smaller locations.

¹¹ 'Midsummer Retail Report: 2015', Colliers, August 2015

¹² 'Midsummer Retail Report: 2017', Colliers, August 2017

¹³ 'Experian GOAD Category Report', Experian, January 2018

¹⁴ 'Experian GOAD Category Report', Experian, June 2018

¹⁵ 'Experian GOAD Category Report', Experian May 2018

The Role of the Town Centre

- 2.33** The improving high street environment is not solely driven by 'pure' retail offerings. The food and beverage sector is a significant contributing factor to the growth of UK high streets as town centres adapt to the changing way that people live and shop. Colliers explains the desire of UK shoppers to 'graze' while they shop has seen a significant boost in the quantity of coffee shops, restaurants, bars and grab-and-go convenience food outlets on UK high streets. We are also seeing a growing number of multi-faceted stores, such as a barber shop that also sells clothing, or a vape shop that also serves coffee. In addition to this, the growing popularity of going out to eat brings more visitors to the town centre¹⁶.
- 2.34** Further to this, as digital technologies continue to advance, the importance of understanding and operating within the digital world of retail shopping is becoming just as essential as trading in the traditional physical shopping world. The challenges set by online retailing are substantial. However, large cities, towns, or shopping centres, which offer an 'experience' and choice for customers with high volume trading potential for the retailers, continue to be attractive¹⁷. Growing investments in physical retail development is indicative of the desire of shoppers to have a physical retail experience and not just make all of their retail purchases online.
- 2.35** UK town centres and high streets provide highly visible and empirical evidence of the scale of the economic recession. Recent improvements in the economy (as evident when reviewing household spending and average earnings statistics) have seen increased investment into town centre retail stores and a small but important drop in vacancy rates.

Retail Trends

Convenience

- 2.36** Instability currently prevails in the food retailing market and supermarkets are most affected. Numerous supermarket chains are currently in the process of consolidating their assets; selling stores, pulling construction programmes, and letting go of sites already with planning permission.

¹⁶ 'UK Economic Outlook', PwC, March 2016

¹⁷ 'Midsummer Retail Report' Colliers, August 2015

- 2.37** The prominence and attractiveness of out-of-centre, large format food stores has resulted in suffering town centres. However, following recognition of these detrimental impacts in 2014, UK Governments enforced stricter local planning rules, which make these types of development harder to gain planning permission for. At the forefront of this is the 'town centre first' approach, which is re-asserted in the NPPFv2 (2018) and the SPPS 2015
- 2.38** Food and grocery retailers have had to return to town centres and adopt alternative methods of retailing. This is also a response to changing consumer behaviours. The UK food market has been shaped in recent years by the broad change in shopping habits with many customers opting to complete smaller but more frequent grocery shops. Fewer households now complete the traditional once-a-week "big shop".
- 2.39** The most common approach taken is to offer lower cost product ranges within stores. We also see retailers offering much more flexible models, including protracted opening hours (sometimes staying open 24 hours), online shopping, home delivery, and click and collect. Retailers are also diversifying into non-food items including fuel. In a bid to keep and win new customers, many retailers have opted to put a concerted effort into branding, and marketing, including presence on social media. Tapping into the modern consumer's desire to purchase food on the go, several food retailers now have a presence in dense town centre locations where their stores are accommodated over much smaller floor plates such as Sainsbury's Local and Tesco Express.
- 2.40** In a move that may change the face of supermarket shopping as we know it, Amazon opened a store in Seattle in January 2018 which involves no check-out operators or self-service tills¹⁸. Customers enter the store by swiping their smart-phone "Amazon Go app" and are tracked by hundreds of ceiling mounted cameras and electric sensors that register what items they pick up. Purchases are billed to the customers' credit card when they leave the store.

¹⁸ 'Amazon opens a supermarket with no checkouts' BBC, 22 January 2018

- 2.41** Discount food retailers remain the fastest growing supermarkets in UK town centres. When analysing the performance of Aldi, which is considered a food and grocery discounter, Retail Economics describes that it has “attacked the heartland of UK grocery” by undercutting the ‘big four’ with highly competitive prices and investing in more high quality premium produce. This approach has broadened Aldi’s appeal to more affluent customers. In the same way, Lidl has also adopted an aggressive growth programme relating to its pricing, produce offer and ambitious store expansion since 2013. To date, the strategy has achieved what it has intended by growing Lidl’s market share. The widening of product ranges will help broaden market appeal while a focus on more alcohol will help supportsales¹⁹.
- 2.42** In the 12 weeks to 31st December 2017, Aldi commanded 6.8% of the UK grocery market, while Lidl was on 5.0%²⁰. Even so, Tesco remains the UK’s largest supermarket with a 28.0% market share, while Sainsbury’s has 16.4%, Asda 15.3%, Morrisons 10.7%, Co-op 5.8%, and Waitrose 5.2%²¹.
- 2.43** The recently announced merger of Sainsbury’s and Asda indicates that supermarkets are having to think outside the box to bring prices down. In July 2018, Tesco announced a partnership with French supermarket giant Carrefour, thought to be a direct response to the Sainsbury’s and Asda merger. The scene set above indicates the food sector is facing a number of unique structural challenges, which is causing issues for food operations and subsequently restricting growth in this sector. One of the overriding challenges comes from the intense price competition created by the key food discounters (Aldi and Lidl), which are taking market shares away from the big four grocers (Tesco, Sainsbury’s, Morrisons, Asda)²².

¹⁹ ‘UK Food and Grocery’, Retail Economics, September 2015

²⁰ ‘Why Aldi and Lidl will keep on growing’, Management Today Online, 31 May 2017

²¹ Kantar World Panel, 31 December 2017

²² ‘UK Retail Sales’, Retail Economics, March 2016

Comparison

2.44 The comparison retail market saw the biggest drop in trade during the economic recession. The Economic and Social Research Council, in its March 2015 report, attributes the drop in sales to two factors –

- (1) consumers' general reluctance to spend on comparison 'big-ticket' items, and
- (2) the fact that comparison retailers are often more susceptible to online price comparison.

In recent years, consumers are growing more confident in making online purchases of comparison goods, meaning town centre stores continue to suffer as a consequence²³. The strong performance of comparison online retailing is supported by a report showing high levels of year-on-year growth in the sector²⁴.

2.45 When evaluating the current trends influencing the performance of the comparison retail market, it is important to recognise the physical shift that is evident in town centres nationwide. The number of comparison retail units present in UK high streets is decreasing. This trend is evident when reviewing Experian Goad data which identifies that in November 2016 the comparison sector accounted for 32.0%²⁵ of all town centre units, dropping from 33.4%²⁶ in 2011 (during the recession) and 47.4%²⁷ in 2006 (before the recession).

2.46 Against this background, in their Midsummer Retail Report, Colliers²⁸ predicts that comparison retailers are holding on to their current units while in search of larger higher quality retail units where they can provide a wider range of items. This is driven by the need to provide consumers with a high-quality shopping environment, coupled with their expectations for a wide selection of goods being available in store. Retailers must meet these demands in order to compete with the rise of e-tailing for comparison goods. Notwithstanding, Colliers more recent report identifies that retailers are continuing

²³ 'Annual Report', The Economic and Social Research Council, March 2015

²⁴ 'Online Retailing: Britain, Europe, US and Canada', Centres for Retailing, 2017

²⁵ 'Goad Category Report', Experian, November 2016

²⁶ WYG, 2011

²⁷ GVA Grimley, 2006

²⁸ 'Colliers Midsummer Retail Report', Colliers, August 2015

to invest in the integration between online and traditional retailing, and many retailers have entered into a new phase of consolidation²⁹.

2.47 In summary, comparison retailing is fuelled by fierce competition, and in particular competition made possible by the internet. Companies operating in the comparison market need to fight for their sales through adapting to the new and modern desires and needs of the consumer, and most importantly acknowledge the fact that prices are likely to be compared over the internet. The option of 'click and collect' is a combination being introduced in response to growing popularity. To attract customers into a physical store, it is vital that the stores:

- (1) provide an enjoyable experience for the shopper by being in a physically and aesthetically pleasing and exciting space; and
- (2) provide a wide array of different products that the shopper can see and touch.

Special Forms of Trading and Internet Shopping

2.48 It is very much apparent that internet shopping has revolutionised the retail market as we know it, particularly when considering the rise in the availability and popularity of online shopping. The popularity and increased availability of the internet, as well as the growing confidence of consumers in making purchases online, has led to a distinctive change in the way in which goods and services are purchased. Reports on "E-tailing" suggest it currently accounts for somewhere between one in every five to ten pounds that are spent in the UK³⁰ (taking account of monthly fluctuations).

2.49 The strong increase in online shopping in the past decade has lifted the share of special forms of trading (SFT) to a level where it now accounts for 16.5% of total retail sales³¹. The ONS collects data for SFT, comprising sales via the internet, mail order, stall and markets, door to door and telephone sales.

²⁹ 'Midsummer Retail Report: 2017', Colliers, August 2017

³⁰ 'UK online retail sales to reach £62.7bn in 2020', Verdict Retail, 17 September 2015

³¹ 'Retail Planner Briefing Note 15', Experian, December 2017

- 2.50** The internet's share of total retail is expected to come in at roughly 14% of all purchases for 2017, and is valued at £55.1 billion at 2017 prices. By comparison, internet sales accounted for 4.7% of all purchases in 2008. Non-internet forms of SFT were estimated to account for £8.8 billion in 2017, bringing the total SFT to £63.9 billion. Experian forecasts that by 2022 the SFT share of total retail sales will reach 20%, and 22.5% by the mid-2030s. Growth is expected to be maintained, particularly through new technology such as mobile phones and tablets that make internet shopping even more convenient.
- 2.51** In addition, a more co-ordinated approach to retail offer is expected with the online and physical world working together – an approach which is coined "omni-channel". This is indicative of the relationship between an online retail presence producing in-store purchasing. Research produced by Deloitte in 2015 estimated that digital technology influenced 33% of in-store retail sales in the UK in 2014, equivalent to £100 billion³².
- 2.52** In summary, the rise of the online retail world continues apace. As the influence of "E-Commerce" continues to grow, we can expect retailers to react and start prioritising how they will make sure the relationship between real world retail stores and their online presence become more integrated.

Out of Centre Retailing, Shopping Centres and Retail Parks

- 2.53** From 1996 to 2006, out-of-town retailing was recognised as the 'engine of retailing growth'. Between 1996 and 2006 retail sales as a whole increased by 62.1% and sales at out-of-town stores grew nearly twice as fast, at 118%³³.
- 2.54** The growth of out-of-centre retailing has been constrained by the 'town centre first' policy regime enforced through the NPPF in the UK, and the SPPS in Northern Ireland, which was published in 2015. As a consequence of the prevailing policy regime, traditionally out-of-centre retailers (for example supermarkets) are re-focusing back to the centre of UK towns.

³² 'The Deloitte Consumer Review (2015) – Digital Predictions 2015', Deloitte, 2015

³³ 'London Borough of Richmond-Upon-Thames Retail Study 2006', GVA Grimley, March 2006

- 2.55** In 2013, Deloitte highlighted the fact that there is a limit to how much an out-of-centre shopping centre can fully meet the needs of consumers³⁴. Deloitte reported the drive of consumers to out-of-centre locations is primarily motivated by their desire to seek out lower prices, convenience (e.g. ability to park cars, visit multiple shops on one trip), and the wide range of goods available at out-of-centre locations by virtue of their larger store formats. However, changes in consumer habits have driven a return to smaller format shops in more centrally located and accessible locations. As consumer habits return to traditional in-centre shopping, the draw of out-of-centre shopping venues is weakened.
- 2.56** Notwithstanding, shopping centre complexes and retail parks continue to be an integral part of retailing across the UK, although the emphasis on such complexes has changed over the past decade. In 2011, Colliers reported that shopping centre development was at a standstill and little activity was anticipated over the next four years to 2015³⁵. However, in recent years the level of shopping centre development in the UK has seen some progression, following a number of years of very minimal development.
- 2.57** It is clear that the draw of shopping centres includes the experience, and not the retail offer alone. Trends show that consumers are increasingly willing to travel to larger out of town shopping centres for their overall experience and to use the leisure facilities. In response to this, the split between retail and leisure units present within UK shopping centres is shifting; with more experiential offers in the form of leisure services.

Residential Growth in Town Centres

- 2.58** Residential uses within town centres are proving both beneficial and challenging in terms of town centre revitalisation. Residential uses within town centres lead to added footfall and patronage for food and non-food stores, and retail and leisure services. On the other hand, residential development within town centres can have a negative impact on the functionality of retail and leisure due to the sensitivities associated with residential development such as noise, odour and air quality. It is vitally important to strike a balance between all interests and find an equilibrium.

³⁴ 'The Deloitte Consumer Review 2013', Deloitte, 2013

³⁵ 'Colliers Midsummer Retail Report', Colliers, August 2016

Trends in Leisure

- 2.59** Leisure is often considered a discretionary activity and, as such, consumer spending on leisure is greatly influenced by the economic climate and, in particular, average levels of disposable incomes. However, when assessing the average spend of UK households on leisure activities, it becomes clear that, even in light of an economic downturn, consumers in the UK have shown a growing desire to engage in leisure activities. Mintel estimated that this industry was worth £80 billion in 2015, approximately 15% higher than the 2010 total expected worth³⁶.
- 2.60** Figure 2.3 illustrates changes in UK average weekly household spending on leisure before the recession (2006), during the recession (2011) and after the recession (2014 and 2018). ONS have adjusted all the figures to strip out the effects of inflation, so that true like-for-like comparisons can be made.

Figure 2.3 / ONS Weekly Household Spending Data on Leisure Items

Leisure Item / Activity	2006		2011		2014		2017	
	£	%	£	%	£	%	£	%
Sports admissions, subscriptions, leisure class fees and equipment hire	£5.80	17.6	£6.70	18.9	£6.90	17.9	£7.10	16.8
Cinema, theatre and museums etc.	£2.00	6.1	£2.40	6.8	£2.80	7.3	£2.80	6.6
Admissions to clubs, dances, discos, bingo	£0.60	1.8	£0.60	1.7	£0.50	1.3	£0.70	1.7
Gambling payments	£3.60	10.9	£2.70	7.6	£2.90	7.5	£2.50	5.9
Restaurants and café meals	£12.80	38.9	£14.70	41.4	£16.60	43.1	£19.00	45.0
Take away meals/food and other snack food	£8.10	24.6	£8.40	23.7	£8.80	22.9	£10.10	23.9
Total	£32.90	100	£35.50	100	£38.50	100	£42.20	100

Sources: 'Family Spending, 2018 Edition', ONS, released on 18 January 2018
 'Family Spending, 2015 Edition', ONS, released on 8 December 2015
 'Family Spending, 2012 Edition', ONS, released on 4 December 2012
 'Family Spending, 2007 Edition', ONS, released on 28 January 2008

- 2.61** The most recent ONS data (for the 2017 year based on three year average) identified that an average UK household would spend £42.20 on leisure activities, out a total of £554.20 spent on average by UK households per week. It is interesting to assess the data on average household spending from the

³⁶ 'Leisure Review', Mintel, October 2015

ONS for years preceding the recession (2006), during the recession (2011) and after the recession (2014). Overall spend on leisure activities has generally increased in that time from £32.90 in 2006 to £42.20 in 2017. There was an overall increase in average leisure spend per week from £32.90 in 2006 to £42.20 in 2017. Overall the proportion of spend on particular leisure items has for the most part stayed reasonably similar, although there has been a reduction in gambling payments (10.9% in 2006, compared with 5.0% in 2017). There has also been an increase in spend on restaurants and café meals (38.9% in 2006 compared with 45.0% in 2017).

- 2.62** A challenge now faces the industry with the introduction of the National Living Wage. From 1 April 2016, the UK introduced a new mandatory National Minimum Wage (NMW) for workers aged 25 and above, initially set at £7.20 per hour - a rise of 50p relative to the previous NMW rate. That represents a £910 per annum increase in earnings for a full-time worker on the former National Minimum Wage. A NMW rate of £6.70 per hour continues to apply for those aged 21 to 24. As of April 2017 the NMW for workers aged 25 and over was £7.50, and £7.05 for those aged 21 to 24³⁷.
- 2.63** Therefore, while the increased base level wage will improve living standards for low-paid workers, in the process it seems certain to push up leisure operators' wage costs, since they largely rely on unskilled workers.

Regional Market Trends – Northern Ireland

- 2.64** ONS publishes headline labour market trends at the end of each quarter. Figure 2.4 shows employment rate, unemployment rate and inactivity rate for the United Kingdom as a whole, England, and Northern Ireland.
- 2.65** The tables shows that Northern Ireland, had both the lowest employment rate and the lowest unemployment rate. Interestingly, Northern Ireland also had the highest economic inactivity rate.

³⁷ 'National Minimum Wage and National Living Wage Rates', Gov.uk, accessed January 2018

Figure 2.4 / ONS Regional Labour Market Statistics Comparison

	Employment rate (%) aged 16 to 64	Unemployment rate (%) aged 16 and over	Inactivity rate (%) aged 16 to 64
United Kingdom	75.6	4.2	21.0
England	76.0	4.2	20.6
Northern Ireland	69.7	3.1	28.0

Source: ONS: Regional labour market statistics in the UK: May 2018

- 2.66** The ONS reported an unemployment rate of 3.1% for the period February 2018 to April 2018, and when seasonally adjusted was 3.3%³⁸, the third lowest on record. By comparison, the same rate for the previous year was 5.4%, showing a significant improvement overall.
- 2.67** The latest NI unemployment rate (3.3%) was below the UK average of 4.2% (the joint lowest since 1992). The NI unemployment rate was the joint lowest rate of the UK regions (with the South West) and was below the European Union (7.1%) and the Republic of Ireland (6.1%) rates for March 2018.
- 2.68** A look into household expenditure shows that Northern Ireland had a lower than average weekly household expenditure of £497.10 between 2015 and 2017. This is compared with the UK average for the same period of £536.80. Of note, only three regions (London, South East, and East) had weekly household expenditure that exceeded the UK average.
- 2.69** Recent UK wide store closures have had an impact on major stores in Northern Ireland, including in Ballymena, where three high street clothing chains - Evans, Monsoon and Miss Selfridge - have closed in Fairhill Shopping Centre. The administrators of electrical chain Maplin have said they will start closing its stores - there are four in Northern Ireland - while four Toys R Us shops in the province have also shut after its collapse.
- 2.70** Notwithstanding economic volatility, Collier's Midsummer Retail Report 2018 identifies that the Northern Ireland Economy relies heavily on its role as a provider of services to the local population, the national economy and the Government. While public sector employment is not necessarily associated with high value industries, it is one of the less volatile parts of the economy, a contributing factor to Northern Ireland's ability to withstand turbulence in the retail market³⁹.

³⁸ Labour Force Survey, NISRA, June 2018³⁹ 'Colliers Midsummer Retail Report', Colliers, July 2018

- 2.71** The Kantar Worldpanel Northern Ireland Supermarket Share Survey for 2018 showed that Lidl, which has 38 stores here, has the strongest increase in consumer spend over the past year at 5.7%, even though it holds the smallest market share overall. Tesco consumer spend was up 2.3%, followed by Sainsbury's, which saw an increase of 1.9%.
- 2.72** Asda was at the bottom of the supermarket growth league as it experienced a rise in consumer spend of just 0.2%. The research also showed that Tesco, which has around 50 stores in Northern Ireland, continues to dominate the sector with a market share of 35.2%. Sainsbury's and Asda hold 17.4% and 17.1% respectively, while Lidl holds 5.6% of the market – a rise of 0.2% over the past year. Asda and Sainsbury's, which have 17 and 14 stores in NI respectively, are in talks over a merger.

Conclusion

- 2.73** The retail market has experienced significant changes in recent years. The prevailing retail environment continues to be somewhat unstable. In response to this unpredictability, those operating in the market are forced to adapt quickly or otherwise face failing profits.
- 2.74** Consumer expectations are continually evolving, producing a dynamic and unstable retail market. The providers operating in the market are required to evolve as a result of numerous dynamic factors, including: the characteristics of the UK population; consumer demands; popularity in private car ownership; planning policy; and digital advances. The diverse nature of the factors which form consumer expectations is forcing retailers to pursue new innovative development proposals.
- 2.75** During 2017 the consumer economy tightened, with rising inflation and slowing wage growth. Experian reports that 2017 saw the UK shift from being one of the fastest growing G7 economies to one of the slowest⁴⁰. The ongoing uncertainty around Brexit and the 2017 general election only exacerbated the prevailing uncertainty.

⁴⁰ 'Retail Planner Briefing Note 15', Experian, December 2017

2.76 In Northern Ireland, low unemployment and a high proportion of people employed within the public services mean there is a certain level of economic resilience. Notwithstanding, NI has not been immune to economic volatility and UK wide store closures, with key chains closing stores in some of NI's largest towns. The region also has a lower than average weekly household expenditure, compared with most parts of the UK. Ongoing market uncertainty around Brexit is likely to mean that overall household expenditure remains low.

3.0 Town Centre Assessment

Introduction

- 3.1 This section of the report details our qualitative and quantitative analysis of the key centres within Mid & East Antrim; Ballymena, Carrickfergus and Larne. This assessment includes a health check assessment to assess the vitality and viability of town centres, as well as a quantitative analysis of market shares.

Methodology

- 3.2 This town centre assessment builds on our analysis of market trends as outlined in Chapter 2. We do so through two sources of new empirical evidence; the results of a household telephone survey, and our town centre health-checks. By combining the results of both, we are able to build a picture of the current health of each centre, based on analysis of its market share for different goods, as well as its performance against the range of health-check indicators set out in the SPPS. We describe our methodology for each step below, before going on to examine each of the Borough's three main centres.

The Household Telephone Survey

- 3.3 Household Telephone Surveys are recognised across the retail industry, and within planning policy guidance, as an excellent means of understanding where people within a specified area carry out their retail and leisure expenditure, and why. We utilise the results of a household telephone survey to inform our quantitative analysis of the turnover of specific towns and other destinations, as well as its qualitative findings on attitudes and perceptions of different centres.
- 3.4 For Mid & East Antrim Borough, we identified a suitable 'Study Area' as shown on the plan at Appendix A. A Study Area should cover the key area of interest (in this case the Borough itself) and is the area within which you would expect the resident population of the Borough to carry out the majority of its retail and leisure spending.
- 3.5 The Study Area is defined by postcode geography in order to allow analysis by sub-areas, and to allow market research companies to obtain accurate samples. In this instance, we defined that there should be eight postcode 'Zones' within the Study Area. Zones 1-6 broadly comprise the extent of the

Borough. We ensure that the survey area extends beyond the Borough boundary though, in order to ensure that all parts of the Borough are covered. We also do this to ensure that we get an understanding of any inflow of trade from beyond the Borough from residents in nearby areas. Zones 7 and 8 therefore cover the areas around Ballyclare and Antrim.

- 3.6 We are always also mindful of the potential for inflows of trade from outside the Study Area. We therefore make suitable allowances for these potential flows of trade in our assessment.
- 3.7 Accordingly, we instructed NEMS Market Research to conduct a Household Telephone Survey of 800 representative households across the Study Area in February 2018. The results of their survey are contained at Appendix B. At the beginning of their report is a full description of the research methodology, sampling size, weightings and sample profiles. Having worked with NEMS on more than 30 similar studies over the past few years, we are content that their methodology is robust in the eyes of a range of Inspectors at LDP Independent Examination and provides an accurate snapshot of market share information at the point of survey. NEMS quote this as being to a 95% confidence range.
- 3.8 In addition to providing information regarding spending habits, the results of the NEMS Household Survey offer an indication of locations/facilities where residents of the Study Area satisfy their leisure and cultural needs. As such, the Survey enables us to analyse patterns of travel and potential deficiencies (those that are qualitative in nature) in the Borough.

Health Checks

- 3.9 In tandem with the Household Survey results, Nexus acting jointly with Council in March and April 2018 carried out a series of town centre health checks for the three main town centres under prime consideration in this study; Ballymena, Carrickfergus and Larne. Health checks are both a physical exercise in walking the town centres to understand their make-up and any physical strengths or weaknesses, as well as an exercise in consulting with local stakeholders.
- **Diversity of uses** – Data on the diversity of uses in each of the town centres was collated during retail surveys conducted by the Council. The collected data includes the number of units in each retail category provided in these locations. Appendix C contains ground floor land use maps developed the Council for each of the main town centres.

- **Vacancy rates** – Vacancy rates were identified during Council retail surveys. The volume of vacant floorspace within a town centre can provide an indication of how it is performing. However, it is important to acknowledge that a degree of vacancy is inevitable and sometimes desirable. Some 'churn' is expected in the market as units alter and change as new businesses enter a town and others leave. In this context, vacant units are commonly found in even the strongest of town centres. Equally, a low vacancy rate does not necessarily mean a town centre is performing well; as the quality and performance of the occupied units may be relatively poor. For example, if a town centre is dominated by a high number of charity shops, while it may have a low vacancy rate, the town's overall attractiveness is likely to be poor and the town may be facing decline.
- **Environmental quality** – Consideration of the quality of the buildings and public realm in each of the centres was informed by a combination of Council assessment, Nexus Planning's site visits to each of the centres and the results of the NEMS household telephone survey.
- **Physical structure and constraints** – Consideration of development constraints including heritage assets and flood risk. Constraints maps have been provided by the Council in this regard.
- **Footfall** – The Council has undertaken formal footfall counts at key locations in some centres including assessing walk in routes to each town centre. General footfall and pedestrian flows were also observed by Nexus Planning during site visits to each of the study centres.
- **Retailer representation** – Information on the current strength of centres and retailer representation has been derived from Experian GOAD Category Reports and from other published sources and is explored throughout the health check assessments.
- **Prime rent** – An examination of average prime rents within each town centre to facilitate an understanding of shopping rents and investment yields.
- **Perceptions of safety and occurrence of crime** – General perceptions of safety were gathered during the site visits and from a review of existing crime statistics published by the Department of Communities.

- **Accessibility** – Consideration of access to and around each centre was informed by the council's review of data detailing access to public transport and parking facilities. The accessibility of a centre is determined by the ease and convenience of access by a variety of transport means; including that which is provided to pedestrians, cyclists and disabled people – and the ease of access from the main arrival points to the principal attractions in the centre.

3.10 The following sections of the report provides a health check assessment of each of the main town centres in respect to the above indicators as selected by the Council and guided by the requirements of the SPPS and the Study brief.

3.11 As part of the health check assessments, Nexus undertook stakeholder engagement with local representatives to understand the local context, including issues and concerns affecting local residents and businesses. This involved a stakeholder session in each town that was attended by invited stakeholders. A presentation was given at each, followed by a round table discussion during which attendees were invited to give their feedback.

3.12 The engagement covered the vitality and viability of the centres, vacancies, mix of retail, parking, street environment, accessibility, crime and security and town centre events.

Ballymena Town Centre

Health Check Assessment

Description

Ballymena is the main town and largest settlement within MEA Borough with a population of 29,467.

Ballymena town centre is broadly defined by Parkway in the north, the A26 to the west, Braid River in the south and Broughshane Street/Church Street to the east.

Ballymena is identified as being a Sub Regional Town and Main Hub in the Regional Development Strategy. The town has an excellent location on the edge of BMUA with easy access to ports and airports. The town is located on the main route between Belfast and the important tourism attractions of the north coast.

Status

Main Town



Figure 3.1/Town Centre Composition

Ballymena	Units (#) 2018	Units (%) 2018	Units (%) NI Avg.	Units (%) UK Avg.
Convenience	29	4.8	7.5	9.0
Comparison	184	30.5	33.2	30.8
Retail Services	109	18.1	12.8	14.5
Leisure Services	88	14.6	19.3	24.0
Financial and Business Services	68	11.3	9.2	10.3
Miscellaneous	0	0	0	0.1
Vacant	125	20.7	18.1	11.2
TOTAL	603	100	100	100

Source: Mid & East Antrim Borough Council, 2018 & Experian, 2018

Overall Composition Ballymena is the largest centre in MEA Borough, and had 603 retail units within the town centre at the time of the MEA Borough Council retail surveys. Ballymena has the most comprehensive and diverse offer of retail and services of the three main towns in the Borough and as a result, is the most popular of three.

The centre has two main shopping centres within the town centre boundary; the Fairhill Centre and the Tower Centre. The Fairhill Centre in particular is very popular, although it is located towards the edge of the town centre boundary. The Braidwater Retail Park is also located on the edge of the town centre boundary, partially in, and partially out.

Convenience & Comparison

Just 4.8% of retail units are convenience goods units which is below the NI average of 7.5% and the UK average of 9.0%. This low proportion of convenience goods is a trend that is seen across the Borough. This is partly due to the prominence of large format convenience retail in the Borough, and the dominance of mostly out of centre supermarkets. In Ballymena for example, Tesco is located out of the town centre at Larne Road Link dominates the convenience goods market. Historical composition data for Ballymena indicates that the proportion of convenience goods stores has seen a reduction from 6.2% in 2012 (Experian, 2012).

Conversely, Ballymena's comparison goods offer of 30.5% of units is very similar to the UK average of 30.8%, and just lower than the NI average of 33.2%. The town dominates the comparison goods shopping patterns of residents from the Borough across most categories of comparison goods, indicating that the comparison goods market in Ballymena is very

	strong. Historical composition data for Ballymena indicates that in 2012, 34.6% of units were comparison goods units.
Services	<p>Turning to services, and Ballymena has a higher than average proportion of retail services and a lower than average proportion of leisure services. The proportion of financial and business services meanwhile is marginally higher than both the NI and UK averages.</p> <p>In terms of retail services, Ballymena has a proportion of 18.1% retail services units. This is higher than the NI average of 12.8% and the UK average of 14.5%. This is a trend present in all three MEA town centres.</p> <p>Turning to leisure services, Ballymena has a lower proportion of leisure services in the town centre (14.6%) compared with the NI average of 19.3% and the UK average of 24.0%. Again, this is a trend across all three town centres within MEA indicating that we are yet to see the influx of restaurants and cafes and other non-retail town centre uses into the MEA town centres.</p>
Vacancies	Ballymena has a high proportion of vacant units within the town centre, with 20.7% of units vacant at the time of the MEA Borough Council retail survey. This is above the NI average of 18.1% and the UK average of 11.2%. Notwithstanding, Ballymena had the lowest vacancy rate of the three main town centres in MEA and has seen a slight reduction in vacancies since 2012 when the Experian survey found 22.7% vacant units.
Miscellaneous	At the time of Mid and East Antrim land use survey, there were no miscellaneous units within Ballymena Town Centre.
Retailer Representation	<p>Ballymena Town Centre includes an extensive list of national multiples and major retailers, testimony to Ballymena being the largest centre within the Borough. 76 national multiples and major retailers were identified at the time of Mid & East Antrim Borough Council centre survey, including H&M, Superdrug, EE, New Look, Next, Primark, River Island and Topshop.</p> <p>Experian's Goad Category Report identify a list of 30 national multiples that have been identified as major retailers. These are considered to be retailers that are most likely to improve the consumer appeal of a centre. Ballymena Town Centre includes 22 retailers that are on Experian's major retailer list.</p>
Average Prime Rents	£150 per square metre pa (propertypal.com)
Accessibility	Ballymena is reasonably well serviced by public transport, and Ballymena railway station is located a 3-7 minute walk from the Town centre. Train services link Ballymena with Belfast and Londonderry and operate daily.

There are four main bus routes into the Town Centre, with 36 services operating each weekday, and 23 services on Saturdays. These bus routes do not operate on Sundays. There are also Ulsterbus Services servicing 14 destinations, and Goldline services to Belfast daily.

Park and Ride Facilities are located at the Bus/Train Station off Princes Street and also Ballee Park and Ride on Antrim Road off A26/ Ballee Roundabout.

The Town Centre is well catered for in terms of parking, with the January 2018 Parking Study Baseline Report completed by Systra, identifying 3,320 car parking spaces, 1,986 of which are in Council run car parks, and 1,244 within private car parks.

Footfall

The walk in routes from surrounding residential areas to Ballymena Town centre are clean and graffiti free, with a good level of lighting. Footpaths are of a reasonable to good width and surfaces are of a good standard, suitable for pushchairs/wheelchairs, especially on the streets where the recent public realm works have been carried out.

Bridge Street/ Linenhall Street and George Street are traffic dominated with up to 4 lanes of traffic as the A26 main traffic route runs through the south western corner of the town centre. As a result this may contribute to high vacancy on these three streets.

Footfall counts were undertaken between Ballymena Town Centre and Braidwater Retail Park at two locations.

A count was undertaken of people moving between Bridge Street and Braidwater Retail Park in both directions. The results showed in general that there were more people travelling from Bridge Street to the Retail Park than the opposite.

The second count was carried out of people travelling from James Street, in Harryville into Braidwater Retail Park. Counts were taken on Thursday and Saturday, and it was generally observed that more people used this route on Saturdays.

Physical Structure and Constraints

The Ballymena Flood Map shows potential for some minor river and surface water flooding throughout the town centre. The majority of river flooding (Q100) is located around the Braid, and in the north west segment of Ballymena. Surface water flooding (I200) is seen at isolated locations throughout the centre.

The Ballymena constraints map prepared by the Council identifies defence and industrial heritage assets, sites and monuments, and listed buildings. These assets are located throughout the centre, constraining development in some parts of Ballymena. A Tree Preservation Order

	exists along the stretch of the Ballymoney Road which falls within the town centre boundary
Perception of Crime and Safety	The Town Centre Database, published by the Department of Communities reports that in 2018 there were 1,633 incidences of crime within Ballymena Town Centre. Of the total crimes, 30% were listed as anti-social behaviour, 17% were violence and sexual offences, and 26% were shoplifting.
Environmental Quality	Public Realm works have recently been completed on Church Street, Wellington Street, Ballymoney Street and Broughshane Street, including widening and re-surfacing of footpaths, soft landscaping, reduction of on-street parking, and installation of street furniture. Most central parts of the town centre were found to be a good standard.
Stakeholder Feedback	<p>Stakeholder feedback and discussion identified a desire to provide some small scale convenience supermarkets within the Ballymena Town Centre to facilitate top-up shopping for workers and those visiting the town centre</p> <p>Stakeholder feedback also indicated some support for encouraging smaller businesses and start-ups in vacant units in the town centre, with lower than normal rents or other incentives. This would provide an opportunity for smaller businesses as well as filling vacant units, which would in turn, improve the perception of the town centre.</p> <p>There was also a point made about bringing interesting and different stores into Ballymena. At the moment stores like Smiggle, Build a Bear and Tiger are all present in Belfast, and therefore people will travel to Belfast specifically to visit those stores. Should such stores be present in Ballymena, that spend would be likely to be retained within the town centre and the Borough.</p>

Town Centre Turnover

- 3.13 Our household telephone survey suggests that the retail turnover of Ballymena is approximately £313.7m per annum (see Tables A5, A10, A12, A14, A16, A18, A20, A22 and A24 at Appendix D). Importantly, this does not include the turnover of service uses, or any spend by residents beyond the Study Area or tourists. Figure 3.2 provides a breakdown of convenience and comparison turnover within the town centre and includes analysis by destination within the town centre. For Ballymena, a breakdown of spend at Fairhill Centre, Braidwater Retail Park and the Tower Centre has been included.
- 3.14 Whilst, Braidwater Retail Park has been included within the turnover calculations for Ballymena Town Centre, it is only partially included within the existing town centre boundary. The Sainsbury's store, for example, is not presently included within the boundary. However, due to proximity and opportunity for linked trips, Braidwater Retail Park has been included in the calculations in Figure 3.2. Almost 17% of the overall turnover of Ballymena Town Centre is derived from Braidwater Retail Park.

Figure 3.2 / Ballymena Town Centre Turnover (£ million)

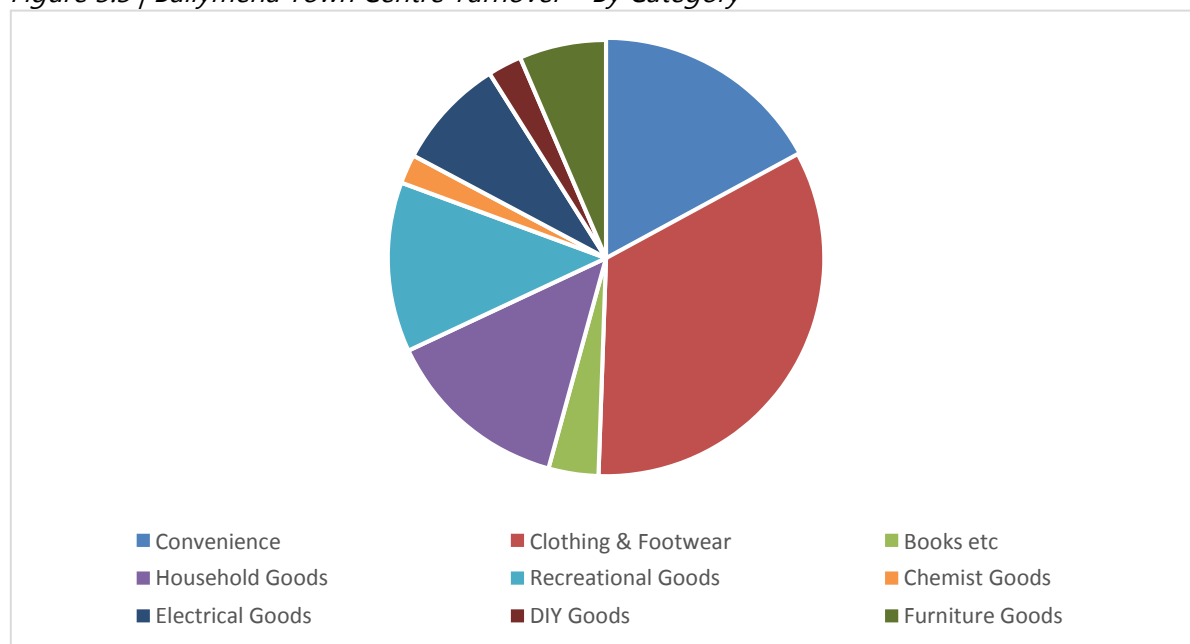
Category	Central Area Shops*	Fairhill Centre	Braidwater RP	Total
Convenience	24.0	2.1	27.5	53.6
Clothing & Footwear	94.1	8.8	2.1	105.0
Books etc	9.1	1.7	0.9	11.6
Household Goods	36.7	1.5	5.0	43.2
Recreational Goods	31.0	0.3	8.1	39.5
Chemist Goods	6.5	0.1	0.3	6.8
Electrical Goods	20.9	0.1	5.0	25.9
DIY Goods	6.0	0.0	1.9	7.9
Furniture Goods	18.4	0.0	1.7	20.2
Total Retail	254.2	14.6	52.5	313.7

Source: Appendix D (Tables A5, A10, A12, A14, A16, A18, A20, A22 and A24)

*The Tower Centre turnover included within Central Area Shops figure, as the location of the shopping centre is difficult to distinguish against the the core town centre shopping area.

3.15 Figure 3.3 provides a chart showing the breakdown of total turnover by category. Spend on clothing and footwear comprises a significant portion of total spend, followed by convenience goods (a high proportion of which is spent at Sainsbury's at Braidwater Retail Park), household goods, and recreational goods.

Figure 3.3 / Ballymena Town Centre Turnover – By Category



Source: Appendix D (Tables A5, A10, A12, A14, A16, A18, A20, A22 and A24)

Expenditure Retention

3.16 In order to establish the extent to which the current retail and leisure provision satisfies the level and nature of consumer demand, we can use the Household Survey to ascertain the rate of retention of spend in particular zones. For Ballymena, we consider residents of Zones 2, 3 and 4, which incorporate Ballymena Town Centre and the surrounding area. Figure 3.4 identifies the proportion of convenience spend of those residents spent in Ballymena Town Centre. In this case, Sainsbury's at Braidwater Retail Park is included in the calculations for spend in the town centre. The overall retention of spend on convenience goods in the town centre by Zone 2, 3 and 4 residents is 25.0% (26.2% of main food shopping and 19.8% of top up shopping).

Figure 3.4 / Convenience Spend by Residents of Zone 2, 3 and 4 in Ballymena

	Main Food	Top-Up	Total
Spend in Town Centre (£ million)	38.1	6.4	44.5
Spend Total (£ million)	145.4	32.4	177.8
Retention (%)	26.2	19.8	25.0

Source: Appendix D (Table A5)

- 3.17 An important factor in these figures is that the most popular convenience goods destination in the Study Area is Tesco Superstore at Larne Road Link, Ballymena. This store is located at an out of centre destination, and is therefore not included in the calculation shown in Figure 3.4, however has an annual survey turnover of £70.3 million. The Tesco Superstore is the largest convenience supermarket in the Borough, having a net sales area of 2,350 sq m. If that store were included in the Ballymena spend figures, the retention rate would increase to 64.6%.
- 3.18 Turning now to comparison goods expenditure, residents of Zones 2, 3 and 4 were surveyed as spending £243.0 million per annum on comparison goods. Figure 3.5 shows that 77.5% of that spend was spent in Ballymena Town Centre.

Figure 3.5 / Comparison Spend by Residents of Zones 2, 3 and 4 in Ballymena

	Total
Spend in Town Centre (£ million)	188.3
Spend Total (£ million)	243.0
Retention (%)	77.5

Source: Appendix D (Table A25)

Market Share

- 3.19 Question 26 of the Household Survey asked residents which centre they visited the most. Ballymena Town Centre was cited as the most popular destination by residents in 6 of the 8 zones.

Figure 3.6 / Ballymena Town Centre Market Share

Zone Residents	Ballymena (%)
Zone 1 Portglenone and Fringe	68.4
Zone 2 Ballymena and West	67.4
Zone 3 Ballymena and East	64.5
Zone 4 Ballymena and South	85.8
Zone 5 Larne	13.1
Zone 6 Carrickfergus	15.1
Zone 7 Ballyclare	70.8
Zone 8 Antrim and Fringe	88.7
Total Study Area	58.7

Source: Appendix B (Question 26)

Leisure

- 3.20 As evident in Figure 3.7, the most popular leisure activity for residents of Zone 2, Zone 3 and Zone 4 was visiting restaurants, with 57.7% of the population of those zones identifying that they visit restaurants. The next most popular activities were visiting the cinema (30.0%), participating in outdoor activities (25.7%), and swimming (22.7%).

Figure 3.7 / Participation in Leisure Activities in Zones 2, 3 and 4

	Ballymena (Zones 2, 3 + 4) (%)
Restaurants	57.7
Cinema	30.0
Outdoor activities	25.7
Swimming	22.7
Pub / bars	22.3
Theatre / concert hall	20.3
Health & Fitness	19.3
Museum / art galleries	12.7
Social club	6.7
Ten pin bowling	4.7
Nightclub	3.3
Bingo	3.0

Source: Appendix B (Question 31)

- 3.21 When asked what leisure facilities residents would like to see more of or improved in the area, 9.3% of respondents identified that they would like to see more or improved children's facilities and activities, 8.3% identified leisure centre, and 7.0% identified swimming pool. Considering that there is already a leisure centre and swimming pool in Ballymena, we assume that respondents were more likely to be suggesting that they would like to see improvements to the existing facility. Notably, 51.3% of respondents stated that there were no facilities they would like to see more or improved, and 7.7% responded that they didn't know. These figures, as outlined in Figure 3.8, indicate that overall, there is a fairly high level of satisfaction with leisure activities and facilities in the Borough.

Figure 3.8 / Top 5 Requests for New or Improved Leisure Facilities

Ballymena (Zones 2, 3 + 4) (%)	
More children facilities / activities	9.3
Leisure centre	8.3
Swimming pool	7.0
More sports facilities (football pitches, tennis courts)	5.7
Bowling alley	5.0

Source: Appendix B (Question 51)

- 3.22 The Ballymena IMC Multiplex Cinema on Larne Road Link, and just outside the town centre boundary was the most popular cinema in the study area with 34.1% of all respondents who said they last attended this cinema.
- 3.23 Similarly, Ballymena was the most popular place in the Study Area to visit restaurants, with 24.4% of all respondents choosing to travel to Ballymena Town Centre the last time they visited a restaurant. The next most popular destination was Belfast. Ballymena and Belfast were also the most popular destinations for visits to bars, clubs, and pubs.
- 3.24 Ballymena was the most popular destination for swimming, with 25.0% of all respondents having last visited the Seven Towers Leisure Centre in Ballymena Town Centre the last time they went swimming.

Recommendations

3.25 Based on the assessment of town centre vitality and viability through the health check assessment of Ballymena Town Centre, and an evaluation of market shares, and retention rates, a set of recommendations has been provided. These recommendations also stem from our analysis of retail and leisure trends and from discussions with local stakeholders.

3.26 LDP Recommendations:

- Promote the development of more leisure services, such as restaurants and bars, in the town centre to continue to strengthen the leisure services offer of Ballymena Town Centre and continue to reduce the reliance on comparison goods shopping as the main draw for visitors, as we continue to see trends away from traditional comparison goods shopping. This could be achieved by avoiding the introduction of planning policy that is prescriptive to only allowing A1 units in the town centre, or core areas within it;
- Promote a thriving evening economy within Ballymena Town Centre by encouraging leisure services such as pubs, bars, and restaurants through planning policy that specifically encourages the improvement of the evening economy. This might be achieved by including policies that specifically allow leisure uses within core town centre areas and promote uses that are active in the evenings. Example policy text is included in Chapter 5 of this Study;
- ☐ Promote the provision of more convenience floorspace in the town centre to reduce the reliance on out of centre supermarkets, particularly Tesco Superstore at Larne Road Link, and help to promote more linked trips within the town centre. Promotion of convenience goods stores might be achieved by allowing the amalgamation of vacant units for provision of a larger foodstore within the town centre. This should be given priority over the provision of additional new convenience floorspace;
- ☐ Promote policies for mixed use developments in appropriate locations throughout the town centre, including for residential led mixed-use developments, to increase footfall within the town centre.

3.27 General Recommendations:

- ☐ Provide incentives, such as rent free periods and monetary grants, for businesses taking up existing vacant units within the town centre to reduce the number of vacant units overall, and to help improve the perception of the town centre.

Carrickfergus Town Centre

Health Check Assessment

Description

Carrickfergus is located in the south east part of Mid & East Antrim, and is a coastal town. At the time of 2011 Census, the town had a population of 27,903 people, making it the second largest settlement in the Borough.

The town is serviced by bus and train, and is within 30 minute driving time of Belfast.

Status

Main Town



Figure 3.9/Town Centre Composition

Carrickfergus	Units (#) 2018	Units (%) 2018	Units (%) NI Avg. 2018.	Units (%) UK Avg. 2018
Convenience	12	5.0	7.5	9.0
Comparison	48	19.9	33.2	30.8
Retail Services	52	21.6	12.8	14.5
Leisure Services	30	12.5	19.3	24.0
Financial and Business Services	30	12.5	9.2	10.3
Miscellaneous	0	0	0	0.1
Vacant	69	28.6	18.1	11.2
TOTAL	241	100	100	100

Source: Mid & East Antrim Borough Council, 2018 & Experian, 2018

Overall Composition

The Carrickfergus Town Centre composition varies quite considerably from both NI averages and UK averages. The headline figures are the particularly high vacancy rate which is significantly higher than both the NI and UK averages. In addition, the town centre has a high proportion of retail services and low proportion of leisure services when compared with both the NI averages and UK wide averages.

Convenience & Comparison

In 2018, there were 12 convenience units counted in Carrickfergus, equating to a proportion of 5.0% of the overall retail units within the town centre boundary. This proportion is lower than both the NI average of 7.5% and the UK average of 9.0%. This low proportion of units is due to the dominance of two large supermarkets within the Town Centre boundary –Sainsbury's and Tesco. Historical composition data from Experian shows that in 2012, Carrickfergus had 4.5% convenience units.

In a similar pattern to convenience units, Carrickfergus has a lower proportion of comparison units than both the NI average (33.2%) and UK average (30.8%), accounting for just 19.9% of retail units within the town centre. Historical data from Experian shows that in 2012, 30.5% of units were comparison goods, an indication that the town centre has struggled to retain comparison retailers in the period in between.

The low proportion of both convenience and comparison retailers within the town centre indicates that there is a deviation from typical town centre retailing opportunities within Carrickfergus Town Centre.

Services	<p>At the time of the Council's survey, retail services units accounted for 21.6% of retail units within the town centre. This is considerably higher than the NI average of 12.8% and the UK average of 14.5%, and an indication that the town centre is not as healthy as it could be. The majority of retail services units were health and beauty units.</p> <p>Leisure services accounted for 12.5% of retail units in the town centre, below the NI average of 19.3%. Notably, the NI average is also below the UK average of 24.0%, indicating that NI centres have not yet reached the same prevalence of leisure services, such as restaurants and cafes, within their town centres as other parts of the UK.</p> <p>Carrickfergus Town Centre had a proportion 12.5% financial and business service units, which is slightly higher than the NI and UK averages.</p>
Vacancies	<p>Carrickfergus has a concerning level of vacant units within the town centre with more than a quarter of retail units within the town centre currently vacant (27.9%). This is well above the NI average of 18.1%, which is in itself above the UK average of 11.2%. Historical composition data indicates that in 2012 there was a proportion of 25.4% vacant units in Carrickfergus Town Centre. The proportion of vacancies is evident and noticeable when visiting the centre, and achieving a reduction in vacancies should be a made a priority.</p>
Miscellaneous	<p>There were no miscellaneous units identified in Carrickfergus Town Centre at the time of the MEA Borough Council survey.</p>
Retailer Representation	<p>Experian's Goad Category Report identify a list of 30 national multiples that have been identified as major retailers. These are considered to be retailers that are most likely to improve the consumer appeal of a centre. Carrickfergus Town Centre includes six retailers that are on Experian's major retailer list, being Argos, Boots, New Look, Sainsbury's, Superdrug and Tesco. Attracting other major retailers to Carrickfergus Town Centre is likely to benefit the overall perception of Carrickfergus and may help to attract more visitors into the town centre.</p>
Prime Rents	<p>£90-£100 per square metre pa (propertypal.com)</p>

Accessibility	<p>Both walk in routes and car parking provision were considered to be adequate within the centre, and there are 1,078 car parking spaces throughout the town (551 Council run, and 527 private spaces). Park and Ride facilities are available at Carrickfergus Train Station. Parking facilities are considered to be well signed throughout the town.</p> <p>The town also has a railway station approximately 0.2 miles from the town centre that provides services to Belfast. On weekdays there are 36 services to Belfast, whilst there are 30 services on Saturday and 14 services on Sunday.</p> <p>In addition to trains, numerous bus services connect Carrickfergus with the surrounding towns.</p>
Physical Structure and Constraints	<p>The Flood Map shows the potential extent of coastal flooding (Q200) along the coast, which can impact southern parts of the town centre. The map also shows some incidence of surface water flooding throughout the town centre.</p> <p>The Carrickfergus Constraints map prepared by the Council identifies defence and industrial heritage assets, sites and monuments, and listed buildings. These assets are located extensively throughout the centre, constraining development in some parts of Carrickfergus. In addition, the majority of the town centre is included within the Area of Archaeological Potential, and parts of the centre are included in the Area of Special Scientific Interest. Carrickfergus Castle is designated as a historic monument in state care.</p>
Footfall	<p>At the time of Nexus site visits there was limited footfall noted in the core Carrickfergus Town Centre. Other parts of the centre including Tesco and Sainsbury's were noted to have higher levels of footfall. An important step to increasing the number of visitors to the town centre may be to encourage customers of those larger supermarkets on the edge of the town centre to link their trips with visits to stores or services within the core town centre area.</p>
Perception of Crime and Safety	<p>The NI Town Centre Database identifies that in 2018 there were 484 incidences of crime in Carrickfergus Town Centre, up from 378 incidences in 2015. 54% of the incidences in 2018 were classed as anti-social behaviour, 16% were classed as violence, and 5% were classed as shoplifting.</p> <p>The overall perception of safety in Carrickfergus would be improved with a reduction in the level of vacant units, and with improved footfall into the core parts of the town centre.</p>

**Environmental
Quality**

The environmental quality of Carrickfergus Town Centre suffers due to the overall number of vacant units. However, there is still potential for the town centre environment to be significantly improved. It is understood that public realm works over the last decade have improved the environmental quality of the town centre, and that more work is to be undertaken.

Carrickfergus is an area with important historical character and value. There are a number of historic sites and monuments and listed buildings throughout the centre, which is within a designated conservation area. The historic environment is both an opportunity and a constraint in terms of further development within the town centre, but overall, it offers significant potential to be utilised more fully to improve the quality of the built environment within the town centre.

**Stakeholder
Feedback**

Stakeholder feedback highlighted a need to improve the image of Carrickfergus in order to attract businesses into the town centre. Improved branding and marketing were seen as important in this context.

Stakeholders also considered that there is an opportunity to tap into the tourist market which is perceived as under-developed. Currently those visiting Carrickfergus Castle are unlikely to also visit shops in the town centre as there is no incentive to do so. Providing links and incentives to also make the trip into the town centre would be an important step towards achieving this.

Town Centre Turnover

- 3.28 Our household telephone survey suggests that the retail turnover of Carrickfergus is approximately £97.3m per annum (see Tables A5, A10, A12, A14, A16, A18, A20, A22 and A24 at Appendix D). Importantly, this does not include the turnover of service uses, or any income from residents beyond the Study Area or from tourism.
- 3.29 Figure 3.10 provides a breakdown of turnover by category. The convenience turnover figure is comprised of spend at the two main supermarkets within Carrickfergus Town Centre (Tesco Extra and Sainsbury's) as well as Home Bargains in the De Courcy Centre, and 'Other Stores, Carrickfergus' which incorporates Iceland in the De Courcy Centre. Tesco Extra had a net sales area of 2,720 m sq, and was established as the most popular convenience goods location in Carrickfergus with an annual survey turnover of £57.2 million, or 75.8% of total convenience spend in Carrickfergus. Sainsbury's, with a net sales area of 1,450 sq m had an annual turnover of £17.3 million.
- 3.30 When considering comparison goods turnover, Carrickfergus accounted for significantly less comparison spend than either Ballymena or Larne, with a total of just £21.9 million. Of that, £5.8 million was on clothing and footwear, and £4.1 million was on recreational goods.

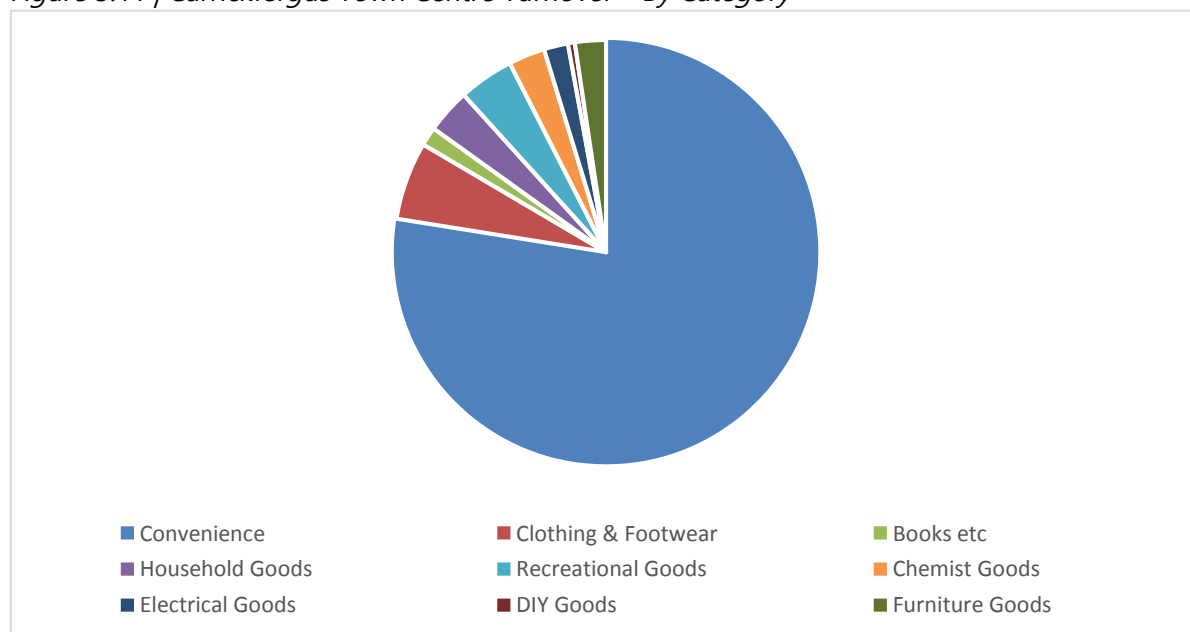
Figure 3.10 / Carrickfergus Town Centre Turnover (£ million)

Category	Town Centre
Convenience	75.5
Clothing & Footwear	5.8
Books etc	1.4
Household Goods	3.3
Recreational Goods	4.1
Chemist Goods	2.7
Electrical Goods	1.8
DIY Goods	0.5
Furniture Goods	2.3
Total Retail	97.3

Source: Appendix D (Tables A5, A10, A12, A14, A16, A18, A20, A22 and A24)

3.31 Figure 3.11 provides a visual representation of the proportion of annual turnover spent on each category in Carrickfergus. The vast majority (77.6%) was convenience goods expenditure.

Figure 3.11 / Carrickfergus Town Centre Turnover – By Category



Source: Appendix D (Tables A5, A10, A12, A14, A16, A18, A20, A22 and A24)

Expenditure Retention

3.32 Turning now to retention of spend, we consider Zone 6 residents' spending habits. Figure 3.12 provides an analysis of spend on convenience goods, and shows that the town centre accounts for 78.4% of main food shopping spend, and 37.5% of top-up shopping. While the retention of top-up shopping is lower than for main food shopping, this is to be expected to some extent as residents are more likely to do their top-up shopping closer to their homes, or at a smaller convenience store at an out-of-centre location. Overall, 71.1% of Zone 6 residents' convenience spend was in Carrickfergus Town Centre, further testimony to the dominance of the Tesco Extra and Sainsbury's that are located within Carrickfergus Town Centre boundary.

Figure 3.12 / Convenience Spend by Residents of Zone 6 in Carrickfergus

	Main Food	Top-Up	Total
Spend in Town Centre (£ million)	62.5	6.4	68.9
Spend Total (£ million)	79.7	17.2	96.9
Retention (%)	78.4	37.5	71.1

Source: Appendix D (Table A5)

- 3.33 Figure 3.13 provides an analysis of Zone 6 residents' spending habits on comparison goods items. The table shows that of the £131.1 million spent on comparison goods annually, just £20.1 million, or 15.3% is spent in Carrickfergus Town Centre. This is a very low proportion of comparison goods spend, and shows that while residents are generally doing their convenience goods shopping within the town centre, they are far more likely to do their comparison goods shopping elsewhere.

Figure 3.13 / Comparison Spend by Residents of Zone 6 in Carrickfergus

	Total
Spend in Town Centre (£ million)	20.1
Spend Total (£ million)	131.1
Retention (%)	15.3

Source: Appendix D (Table A25)

Market Share

- 3.34 Question 26 of the Household Survey asked residents which centre they visited the most and the results are outlined in Figure 3.14. Carrickfergus Town Centre was cited as the most popular destination by the majority of residents surveyed from Zone 6. The results show that residents of other zones were much less likely to visit Carrickfergus Town Centre.

Figure 3.14 / Carrickfergus Town Centre Market Share

Zone Residents	Carrickfergus (%)
Zone 1 Portglenone and Fringe	0.0
Zone 2 Ballymena and West	1.1
Zone 3 Ballymena and East	2.2
Zone 4 Ballymena and South	0.0
Zone 5 Larne	10.1
Zone 6 Carrickfergus	62.4
Zone 7 Ballyclare	5.6
Zone 8 Antrim and Fringe	1.1
Total Study Area	10.3

Source: Appendix B (Question 26)

Leisure

- 3.35 As evident in Figure 3.15, the most popular leisure activity for residents of Zone 6 was visiting restaurants, with 65.0% of respondents from Zone 6 identifying that this was an activity that they participate in. The next most popular activities were outdoor activities (43.0%), visiting the cinema (41.0%), and visiting the theatre or a concert hall (37.0%).

Figure 3.15 / Participation in Leisure Activities in Zones 6

	Carrickfergus (Zone 6) (%)
Restaurant	65.0
Outdoor activities	43.0
Cinema	41.0
Theatre / concert hall	37.0
Pub / bars	31.0
Health & Fitness	30.0
Swimming	24.0
Museum / art galleries	23.0
Social club	11.0
Ten pin bowling	8.0
Nightclub	3.0
Bingo	2.0

Source: Appendix B (Question 31)

3.36 When asked what leisure facilities residents would like to see more of or improved in the area, 10.0% of respondents suggested more children's facilities and activities, 9.0% identified better shopping facilities, and 5.0% identified a leisure centre. Notably, 53.0% of respondents stated that there were no facilities they would like to see more or improved, and 6.0% responded that they didn't know. These figures, as outlined in Figure 3.16, indicate that overall, there is a fairly high level of satisfaction with leisure activities and facilities in the Borough.

Figure 3.16 / Top 5 Requests for New or Improved Leisure Facilities

Carrickfergus (Zone 6) (%)	
More children facilities / activities	10.0
Better shopping facilities	9.0
Leisure centre	5.0
Cycle paths / area	5.0
Bowling alley	4.0

Source: Appendix B (Question 51)

3.37 The Amphitheatre Wellness Centre in Carrickfergus was the most popular destination for indoor sports or health and fitness amongst Zone 6 residents, although it was not popular with residents of other zones. The Amphitheatre Wellness centre was also a popular location for those participating in swimming with 58.3% indicating this was the destination they last swam at.

3.38 The Carrickfergus Omniplex was the third most popular cinema across the Study Area, (12.4%), behind IMC Multiplex in Ballymena (34.2%), and Omniplex in Larne (22.18%). On average, residents of Zone 6 who visited the cinema, visited 10 times per year.

3.39 Residents of Zone 6 who identified that they visited restaurants, were most likely to go to Carrickfergus Town Centre (41.5%), followed by Belfast City Centre (38.5%). Similarly, Carrickfergus and Belfast were the most popular destinations for visits to bars, clubs, and pubs.

Recommendations

3.40 Based on the assessment of town centre vitality and viability through the health check assessment of Carrickfergus Town Centre, and an evaluation of market shares, and retention rates, a set of recommendations has been provided. These recommendations also stem from our analysis of retail and leisure trends and from feedback from key stakeholders.

3.41 LDP Recommendations:

- ☐ Promote the development of more leisure services, such as restaurants and bars, within the town centre to attract visitors, through avoiding the introduction of planning policy that is prescriptive to only allowing A1 retail units in the town centre, or core areas within it;
- ☐ Promote policies for mixed use development in appropriate locations throughout the town centre, including residential led mixed-use development, to increase footfall within the town centre.

3.42 General Recommendations:

- ☐ There is a high level of vacant units within Carrickfergus. We recommend promoting programs to provide incentives to attract major retailers, independent retailers and start-up businesses to take up currently vacant units within the town centre, such as rent free periods and grant funding to assist businesses with moving and set up costs;
- Develop branding and marketing specific to Carrickfergus Town Centre to improve the overall perception of Carrickfergus, and run events that promote the town centre and more specifically, businesses in the town centre. In addition, promote Carrickfergus' unique heritage and historical character to attract the tourist market such as a heritage trail that meanders through the town centre;
- Provide physical connections between footfall generators on the edge of the centre (e.g. Carrickfergus Castle, Sainsbury's and Tesco) and the core town centre area, by improving the urban environment, and providing incentives for customers to link their trips, including vouchers, or where applicable, free parking. Paul Hogarth Company has been engaged by the

Council to produce a Masterplan for urban improvements to Carrickfergus Town Centre, which provide further suggestions for urban improvements.

Larne Town Centre

Health Check Assessment

Description

Larne is located on the coast, on the eastern boundary of the Mid & East Antrim Borough. It is the second largest sea port in Northern Ireland. At the time of the 2011 census, Larne had a population of 18,705, making it the third largest town within the Borough, behind Ballymena and Carrickfergus.

The Larne bus and railway station is located approximately 0.3 miles from the Town Centre and regular train services connect the town with Belfast.

Status

Main Town



Figure 3.17/Town Centre Composition

Larne	Units (#) 2018	Units (%) 2018	Units (%) NI Avg.	Units (%) UK Avg.
Convenience	17	6.0	7.5	9.0
Comparison	77	27.1	33.2	30.8
Retail Services	54	19.0	12.8	14.5
Leisure Services	42	14.8	19.3	24.0
Financial and Business Services	32	11.3	9.2	10.3
Miscellaneous	0	0	0	0.1
Vacant	62	21.8	18.1	11.2
TOTAL	284	100	100	100

Source: Mid & East Antrim Borough Council, 2018 & Experian, 2018

Overall Composition Larne Town Centre had a total of 284 retail units within the town centre boundary at the time of the MEA Borough Council survey. The headline points are that Larne Town Centre has lower than average proportion of convenience units, comparison units and leisure services, and higher than average retail services and vacant units.

Overall the centre has a diverse range of shops, albeit that the breakdown of categories diverges slightly from both the Northern Ireland averages and the UK averages.

Convenience & Comparison

At the time of the MEA Borough survey, there were 17 convenience units, accounting for 6.0% of the total units. This is below the NI average of 7.5% and the UK average of 9.0%. This is due in part to the prominence of large format supermarkets within the Borough, which dominate the convenience goods market. As such there are fewer convenience units in total, and the town is reliant on out of centre convenience supermarkets.

Comparison goods units account for 27.1% of the total units. This proportion is below the NI average of 33.2% and the UK average of 30.8%. This proportion is down from the 2009 Experian Goad survey which identified 33.9% comparison units indicating that there has been an overall reduction in the comparison goods units in the period between 2009 and 2018.

Services

When considering services, Larne has a strong offer of retail services (19.0%) and financial and business services (11.3%), both above the NI averages and UK averages.

As has been seen across all three main town centres within MEA Borough, Larne has a lower proportion of leisure services within the town centre (14.8%) compared with the NI average of 19.3%, and the UK average of 24.0%. Over time we would expect to see the proportion of leisure services increase in the town centre with the growing popularity of restaurants, cafes and bars in town centres.

Vacancies

At the time of the MEA Council survey, Larne had 62 vacant units, resulting in a proportion of 21.8%. This is higher than both the NI vacancy average of 18.1% and the UK average of 11.2%.

According to the GL Hearn Northern Ireland Town Centre Study of 2014, historic vacancy rates have been higher, at 26% in 2007. Subsequently in 2012 there were 21% vacant units. This general reduction over time is a positive sign for the future vitality of Larne Town Centre.

Miscellaneous

At the time of the MEA Borough Council survey there were no miscellaneous units within Larne Town Centre.

Retailer Representation

Experian's Goad Category Reports identify a list of 30 national multiples that have been identified as major retailers. These are considered to be retailers that are most likely to improve the consumer appeal of a centre. Larne Town Centre includes seven retailers that are on Experian's major retailer list, including Argos, Boots, Carphone Warehouse, New Look, O2, Superdrug and Tesco.

Prime Rents

£120-£140 per square metre pa (propertypal.com)

Accessibility

The town centre benefits from a bus and railway station located 0.3 miles from the town centre. Furthermore, there are 951 car parking spaces in the centre, 596 of which are Council run, and 355 privately run.

Some bus and train services connect Larne with other towns within Mid and East Antrim and further afield.

Footpaths were generally seen to be adequate, although it has been noted that some walk in routes would benefit from lighting and improved pavement.

Physical Structure and Constraints

The Flood Map shows potential for some limited river flooding in Larne, particularly in areas to the south of Harbour Highway. Surface water flooding can occur throughout the Town Centre.

The Larne Constraints map prepared by the Council identifies defence and industrial heritage assets, sites and monuments, and listed buildings. These assets are located throughout the centre, constraining development in some parts of Larne.

Footfall

Main Street was perceived as being the most popular part of the town centre along with Laharna Retail Park which offers a large quantity of car parking.

Perception of Crime and Safety

According to the Town Centre database, there were 429 incidences of crime within Larne Town Centre in 2018. 44% of those incidents were anti-social behaviour, 22% were violence and sexual offences, 10% criminal damage and arson, and 11% were shoplifting.

Environmental Quality

Larne was thought to have a good level of environmental quality, with an attractive High Street and good quality pedestrian paths.

A concerted effort by local group Larne Renovation Generation to improve the urban environment in Larne has resulted in a series of small scale projects across the town centre. The group use crowd funding, and aim to turn Larne into '*a creative cultural hub for all the local people and tourists to enjoy*'. The project has resulted in numerous small scale urban improvements including the coloured bicycles.

Stakeholder Feedback

Stakeholders perceived that there is tourist market that currently bypasses Larne. Tour groups that pass through and stay in local hotels tend not to come into the town centre. Encouraging tour groups to utilise shops and services within Larne Town Centre was mentioned as being important.

It was also acknowledged that facilitating residential development within the town centre may help to increase footfall and patronage, particularly where it is possible to turn vacant units above shops into residential apartments.

A further factor identified was the need to improve the overall image of Larne town centre. This could be achieved by improving town centre marketing and branding, and improving the town centre vibrancy in order to attract visitors, and importantly, customers, into the town centre.

Town Centre Turnover

- 3.43 Our household telephone survey suggests that the retail turnover of Larne Town Centre is approximately £74.6m per annum (see Tables A5, A10, A12, A14, A16, A18, A20, A22 and A24 at Appendix D). Importantly, this does not include the turnover of service uses, or any income from tourism.
- 3.44 Figure 3.18 provides a breakdown of turnover by retail category. The convenience turnover figure is comprised of spend at Dunnes Store, Lidl (Laharna Retail Park), Iceland, and 'Local Shops in Larne Town Centre'. Outside of the town centre, Asda was established as the most popular convenience goods location in Larne with an annual survey turnover of £44.6 million, however as the store is not included within the Larne Town Centre boundary, it is not included in Figure 3.18. Asda, Larne, has a net convenience sales floorspace area of 1,285 sq m.
- 3.45 Larne Town Centre, Laharna Retail Park and Murrayfield Shopping Centre have been separated. Figure 3.18 shows that Murrayfield Shopping Centre attracts limited turnover (£0.5 million). Laharna Retail Park had a total turnover of £6.6 million, while the town centre had a turnover of £67.5 million.

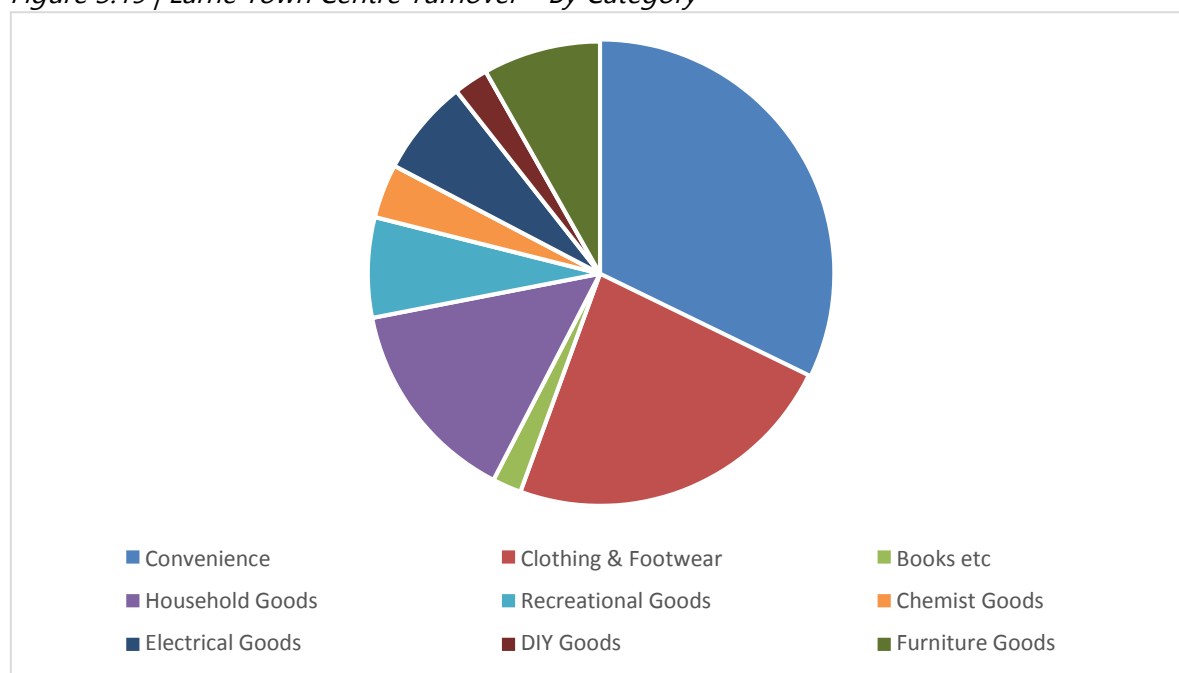
Figure 3.18 / Larne Town Centre Turnover (£ million)

Category	Central Area Shops	Laharna Retail Park	Murrayfield Shopping Centre	Total
Convenience	21.7	2.3	0.0	24.0
Clothing & Footwear	15.3	2.1	0.0	17.4
Books etc	1.5	0.0	0.0	1.5
Household Goods	9.8	0.5	0.3	10.7
Recreational Goods	4.6	0.6	0.0	5.2
Chemist Goods	2.7	0.0	0.0	2.8
Electrical Goods	4.3	0.7	0.1	5.0
DIY Goods	1.8	0.0	0.0	1.8
Furniture Goods	5.8	0.2	0.1	6.1
Total Retail	67.5	6.6	0.5	74.6

Source: Appendix D (Tables A5, A10, A12, A14, A16, A18, A20, A22 and A24)

- 3.46 Figure 3.19 provides a visual representation of the proportion of annual turnover spent on each category in Larne. Of the total turnover, 32.2% of spend in Larne was spent on convenience goods. Expenditure on clothing and footwear is also proportionately significant.

Figure 3.19 / Larne Town Centre Turnover – By Category



Source: Appendix D (Tables A5, A10, A12, A14, A16, A18, A20, A22 and A24)

Retention

- 3.47 Turning now to retention of spend, we consider Zone 5 residents' spending habits. Figure 3.20 provides an analysis of spend on convenience goods, and shows that Larne Town Centre accounts for 11.4% of main food shopping spend, and 25.1% of top-up shopping.
- 3.48 An important factor in these figures is that one of the most popular convenience goods destinations in the Study Area is Asda which is located to the south of the town centre therefore not accounted for in Figure 3.20. Asda has an annual turnover of £44.6 million, and if it were included in the Larne spend figures, the retention rate would increase to 91.1%.

Figure 3.20 / Convenience Spend by Residents of Zone 5 in Larne

	Main Food	Top-Up	Total
Spend in Town Centre (£ million)	6.1	0.8	6.8
Spend Total (£ million)	53.4	3.1	56.4
Retention (%)	11.4	25.1	12.1

Source: Appendix D (Table A5)

- 3.49 The picture regarding comparison goods expenditure is slightly better, with 46.3% of Zone 5 residents' expenditure being retained in Larne Town Centre, as shown in Figure 3.21.

Figure 3.21 / Comparison Spend by Residents of Zone 5 in Larne

	Total
Spend in Town Centre (£ million)	40.0
Spend Total (£ million)	86.5
Retention (%)	46.3

Source: Appendix D (Table A25)

Market Share

- 3.50 Question 26 of the Household Survey asked residents which centre they visited the most. Larne Town Centre was cited as the most popular destination by residents of Zone 5 as shown in Figure 3.22. Despite Larne being more isolated than other town centres in the Borough, overall 15.6% of survey respondents said they visited Larne the most.

Figure 3.22 / Larne Town Centre Market Share

Zone Residents	Larne (%)
Zone 1 Portglenone and Fringe	1.1
Zone 2 Ballymena and West	1.1
Zone 3 Ballymena and East	7.5
Zone 4 Ballymena and South	2.0
Zone 5 Larne	74.8
Zone 6 Carrickfergus	11.8
Zone 7 Ballyclare	20.2
Zone 8 Antrim and Fringe	3.4
Total Study Area	15.6

Source: Appendix B (Question 26)

Leisure

- 3.51 As evident in Figure 3.23, the most popular leisure activity for residents of Zone 5 was visiting restaurants, with 68.0% of the respondents from Zone 5 identifying that they visit restaurants. The next most popular activities were visiting the outdoor activities (42.0%), the cinema (38.0%), and visiting the theatre or a concert hall (36.0%).

Figure 3.23 / Participation in Leisure Activities in Zones 5

Larne (Zone 5) (%)	
Restaurant	68.0
Outdoor activities	42.0
Cinema	38.0
Theatre / concert hall	36.0
Pub / bars	29.0
Museum / art galleries	27.0
Health & Fitness	25.0
Swimming	25.0
Social club	15.0
Ten pin bowling	7.0
Nightclub	3.0
Bingo	1.0

Source: Appendix B (Question 31)

- 3.52 When asked what leisure facilities residents from Zone 5 would like to see more of or improved in the area, 13.0% of respondents identified that they would like to see more children's facilities and activities, 13.0% identified a bowling alley, and 10.0% identified better shopping facilities. Notably, 45.0% of respondents stated that there were no facilities they would like to see more or improved, and 9.0% responded that they didn't know.

Figure 3.24 / Top 5 Requests for New or Improved Leisure Facilities

Larne (Zone 5) (%)	
More children facilities / activities	13.0
Bowling alley	13.0
Better shopping facilities	10.0
Restaurants	10.0
Cycle paths / area	8.0

Source: Appendix B (Question 51)

- 3.53 Larne Leisure Centre was the most popular destination for indoor sports or health and fitness amongst Zone 5 residents. The centre was also popular amongst swimmers, with 64% of those Zone 5 respondents who participate in swimming identifying that they last swam the Larne Leisure Centre.
- 3.54 The Larne Omniplex was one of the most popular cinemas across the Study Area, (22.2%), second only to IMC Multiplex in Ballymena (34.2%). On average, residents of Zone 5 who visited the cinema, attended 9 times per year.
- 3.55 Residents of Zone 5 who identified that they visited restaurants, were most likely to go to Larne Town Centre (50.0%), followed by Belfast City Centre (22.1%) and Carrickfergus Town Centre (10.3%). Similarly, Larne and Belfast were the most popular destinations for visits to bars, clubs, and pubs.

Recommendations

- 3.56 Based on the assessment of town centre vitality and viability through the health check assessment of Larne Town Centre, and an evaluation of market shares and retention rates, a set of recommendations has been provided. These recommendations also stem from our analysis of retail and leisure trends as well as feedback from key stakeholders.
- 3.57 LDP Recommendations:
- Promote the provision of more convenience floorspace in the town centre to reduce the reliance on out of centre supermarkets, particularly Asda at Redlands, and help to promote more linked trips within the town centre. Promotion of convenience goods stores might be achieved by allowing the amalgamation of vacant units for provision of a larger foodstore

within the town centre. This should be given priority over the provision of additional new convenience floorspace;

- Promote the development of more leisure services, such as restaurants and bars, in the town centre to continue to strengthen the leisure services offer of Larne Town Centre and continue to reduce the reliance on comparison goods shopping as the main draw for visitors. This could be achieved by avoiding the introduction of planning policy that is prescriptive to only allowing A1 units in the town centre, or core areas within it;
- Promote policies for mixed use developments in appropriate locations throughout the town centre, including for residential led mixed-use developments, to increase footfall within the town centre.

3.58 General Recommendations:

- Attract and provide incentives, such as rent free periods and grant funding for major and independent retailers to take up vacant units in the town centre which may help to improve the perception of Larne Town Centre;
- Promote tourism within the town centre by encouraging tourism based development including hotel development in the town centre, improving the overall offer of leisure services,, such as restaurants, cafes, and drinking establishments, and working with tourism operators in the area to increase the volume of tourists visiting Larne.

Town Centre Performance Benchmark

- 3.59 The brief asks us to benchmark the performance of the three main town centres in the Borough against comparable town centres in NI and the UK.
- 3.60 Part of the health check exercise was a study of the diversity of uses, or composition, of each of the main town centres. Figure 3.25 provides a comparison of the composition of each town centre by unit number and sectoral representation.
- 3.61 Furthermore, Figure 3.25 also provides composition figures for comparable towns in Northern Ireland and the UK, allowing us to benchmark their performance. Centres have been selected that have a broadly comparable number of units in their town centres. Antrim, Ballyclare, Coleraine and Enniskillen have been selected from Northern Ireland, while Chesterfield, Northampton, Harpenden and Watford have been selected from England.

Figure 3.25 / Comparison of Composition for Study Centres, by Unit, 2018

	Units (#)	Con (%)	Com (%)	RS (%)	LS (%)	FBS (%)	Misc (%)	Vac (%)
MEA Centres								
Ballymena	603	4.8	30.5	18.1	14.6	11.3	0.0	20.7
Carrickfergus	241	5.0	19.9	21.6	12.5	12.5	0.0	28.6
Larne	284	6.0	27.1	19.0	14.8	11.3	0.0	21.8
Comparable Centres								
Antrim	148	11.5	26.4	14.2	18.2	9.5	0.0	20.3
Ballyclare	136	6.6	27.9	17.6	19.1	13.2	0.0	15.4
Enniskillen	338	6.8	32.2	46.7 ¹	-	-	0.0	14.2
Coleraine	431	7.4	38.5	34.3 ¹	-	-	0.0	19.7
Chesterfield	426	7.0	36.9	12.4	23.0	11.7	1.9	7.8
Northampton	224	7.3	26.0	15.2	28.0	9.7	0.0	13.7
Harpenden	210	8.1	26.7	19.0	23.3	13.8	0.0	9.0
Watford	391	6.9	35.3	10.0	27.1	11.0	0.0	9.7
Averages								
NI Average	-	7.5	33.2	12.8	19.3	9.2	0.1	18.1
UK Average	-	9.0	30.8	14.5	24.0	10.3	0.1	11.2

Source: MEA Borough Council, 2018; Experian, 2016-2018, Nexus Planning 2016-2018

Abbreviations: Con – Convenience, Com – Comparison, RS – Retail Services, LS – Leisure Services, FBS – Financial and Business Services, Misc – Miscellaneous, Vac – Vacant.

¹. Enniskillen and Coleraine composition data captured in 2016, using a 'services' category that did not differentiate between retail services, leisure services and financial and business services categories.

- 3.62 Figure 3.25 provides an interesting comparison of the three main centres in the Borough, compared with the other centres in Northern Ireland, and other centres in the England. We also provide NI and UK based averages. The comparison reinforces a couple of key points about how MEA Borough centres are performing that are discussed below.
- 3.63 Overall, MEA centres tend to have a lower proportion of convenience goods units. This is due to the dominance and popularity of large format supermarkets, some of which are located out of centre, such as Tesco Superstore outside of Ballymena Town Centre, and Asda Supermarket outside of Larne Town Centre. The dominance of these large supermarkets means that smaller convenience units such as bakeries, butchers, grocery stores and newsagents struggle to compete, and therefore there are less convenience units overall.
- 3.64 Across the UK over the last few years we are seeing a shift towards more services within town centres, and a shift away from the traditional, purely retail function, as the popularity of online shopping continues to grow. As such, the proportion of comparison goods units within town centres has been in decline, while services units, particularly retail services and leisure services, are becoming more prominent. In the MEA towns in particular, we see a higher than average proportion of retail services units, which is generally a sign of a weaker town centre. In contrast we are not yet seeing the same prominence of leisure services in town centres, when compared against similar sized centres in both Northern Ireland and in England.
- 3.65 Harpenden, for example, in Hertfordshire in England, has a total of 210 units within the town centre, and is therefore comparable to both Carrickfergus and Larne in terms of size. 23.3% of units in Harpenden were leisure services units, compared with just 12.5% in Carrickfergus and 14.8% in Larne. In addition, Harpenden's vacancy rate was just 9.0%, compared with 28.6% in Carrickfergus and 21.8% in Larne.

Smaller Centres

- 3.66 Nexus Planning has undertaken a separate exercise to provide an assessment on the proposed retail hierarchy as outlined in the POP. This complete assessment is attached at Appendix E. The assessment provides commentary on smaller centres within the Borough.

Conclusion

- 3.67 This section of the report has detailed our qualitative and quantitative analysis of Ballymena, Carrickfergus and Larne. This assessment included a health check assessment to assess the vitality and viability of town centres, as well as a quantitative analysis of market shares. By combining the results of both, we have been able to build a picture of the current health of each centre, based on analysis of its market share for different goods, as well as its performance against the range of health-check indicators set out in the SPPS. We have also undertaken a benchmarking exercise that compared MEA centres to other comparable centres in Northern Ireland and in England.
- 3.68 Through the assessment process we have been able to provide recommendations applicable to each of the three main towns, which are designed to improve the vitality and viability of each. Key recommendations relate to reducing vacancies in each town centre, and promoting the incorporation of leisure uses such as restaurants, cafés, bars and drinking establishments, and other footfall generating uses. In addition, we have recommended measures to be taken including environmental improvements, linking footfall generators at the edges of centres, and promoting each town centre through marketing and public relations, and promoting tourism.

4.0 Retail & Leisure Capacity Assessment

Introduction

- 4.1** One of the key aims of this Study is to provide recommendations on the capacity for new retail and leisure floorspace over the plan period to 2030. The use of long-term projections should be treated with caution and reviewed regularly in order to test the accuracy of the forecasts against emerging datasets. External national and international factors can influence the wider performance of the economy, which can have trickle down effects on local shopping patterns. As discussed in Section 2, one such example has been the trend toward convenience discounters (such as Lidl and Aldi) in response to the period of economic downturn between 2008 and 2013.
- 4.2** We also note that any identified retail capacity across the Study Area does not necessarily equate to justification for new retail floorspace in itself (especially in out-of-centre locations), and any such development would be required to be assessed in line with regional policy in terms of impacts on the vitality and viability of town centres, the potential to prejudice emerging town centre developments, and the 'town centre first' sequential approach to site selection.
- 4.3** Detailed quantitative retail capacity tables are enclosed at Appendix D.

Methodology

- 4.4** Retail capacity modelling follows a consistent, robust methodology which incorporates a number of datasets and informed assumptions which we describe further below, but broadly speaking:

Available Expenditure – Turnover of Existing Stores/Centre – Commitments = Surplus or Deficit

- 4.5** Experian MMG3 census software is used to provide localised expenditure per capita per annum for various forms of retail spending. These figures are then projected forwards based on population growth, changes in expenditure over time and Special Forms of Trading (SFT) such as internet shopping.
- 4.6** The turnover of existing retailers across the Study Area is calculated based on average sales densities, or turnover, per square metre. Various retail planning sources such as Verdict UK Food & Grocery Company Briefing Reports, and Mintel Retail Rankings, provide average (or benchmark) sales densities for all national multiple retailers.

- 4.7** Committed retail floorspace, or 'commitments', are then deducted from the available expenditure. Commitments are calculated by establishing the amount of retail floorspace that is due to come forward in existing extant planning permissions. That way, floorspace that is due to come forward but was not accounted for in the household survey, is considered in our calculations. The surplus or deficit equates to the difference between the available retail expenditure across the Study Area and the turnover of existing facilities within the Study Area. If the total turnover is greater than the available expenditure then the model would identify an oversupply of retail floorspace, whilst a surplus of expenditure would suggest capacity for additional retail floorspace.
- 4.8** Once the surplus or deficit of expenditure is calculated, it is then presented in floorspace figures (using average sales density assumptions) in order to demonstrate the findings within a 'real world' context. Often surplus figures are presented under a number of different scenarios representing various retailers. For example, considering convenience spend, discount retailers (such as Aldi and Lidl) operate at a lower sales density than the 'big 4' (Tesco, Asda, Sainsbury's and Morrisons). Given the same pot of expenditure, a higher sales density would result in a lower floorspace capacity than a lower sales density which would result in a higher floorspace capacity.

Pipeline Development

- 4.9** Given the Council's duty to consult with neighbouring councils, the adjoining Council's, Antrim and Newtownabbey, Causeway Coast and Glens, and Mid Ulster were contacted in order to ensure that any committed developments in those local authority areas are accounted for in our capacity forecasting. All adjoining Councils have provided a list of committed and current planning applications and these have been considered in our assessment of capacity for future retail and leisure floorspace.

Capacity for Future Convenience Goods Floorspace

- 4.10** The household survey results show that the Borough has a 67.1% convenience goods market share of all spending carried out by residents of the Study Area (Figure 4.1). The combined turnover of its stores and centres (£314.9m) contrasts to the combined expenditure of the Study Area (£469.0m).
- 4.11** In keeping with standard retail study methodology, when assessing the capacity for new convenience floorspace we adopt a constant market share in line with findings of the latest household survey (i.e.

that stores across MEA Borough will continue to draw 67.1% of all convenience goods spending from the Study Area.

4.12 Based therefore on a constant market share, we then allow for growth in retail expenditure over the period to 2030, as well as utilising data provided within the latest Experian Retail Planner Briefing Note 15 in order to take account of forecast growth in efficiencies in retailers trading (for example, through the adoption of new technologies and more efficient use of available floorspace). Floorspace efficiencies are estimated to have a greater impact on comparison retailers than convenience retailers over the plan period as the rise of food discounting continues to subdue the projected efficiencies in turnover of existing convenience retail floorspace.

4.13 We go on to make a number of statistical assumptions through the quantitative capacity exercise in order to account for the following variables. These are contained at Table 5 of Appendix E and can be summarised as:

- Utilising a 'goods based' approach, we strip out expenditure for non-food comparison goods such as clothing, household goods, CDs, DVDs and other media that are now commonly sold at major foodstores so that only the convenience goods floorspace is being considered (i.e. on a like-for-like basis with available convenience expenditure). These deductions are made in line with floorspace figures sourced from Verdict UK or, where data is not available, Nexus' professional judgement based on site visits.
- We also make assumptions as to the gross to net convenience goods sales floorspace of each store, again utilising online planning records where available, Storepoint 2016, Verdict UK Food & Grocery Retailers 2015 or Nexus' professional judgement.
- Finally, we consider whether foodstores are likely to attract any additional 'inflow' from outside of the Study Area. We have based this assessment on the results obtained from survey, as well as an assessment of potential spend from other areas (including tourist spend).

4.14 We then go on to calculate the anticipated turnover of all major convenience goods operators based on the published company sales data, referred to as 'benchmark' turnover. 'Benchmark' turnover is calculated from national average 'sales densities' (turnover per square metre) from sources such as Verdict UK Food & Grocery Company Briefing Reports and Mintel Retail Rankings. By comparing the turnover estimates derived from the findings of the household survey (total available expenditure

distributed on the basis of each destinations' market share) to the benchmark turnovers, we are able to establish where stores are trading above (overtrading) or below (under-trading) company averages.

- 4.15** Surplus expenditure over and above benchmark turnover is considered to be available to support new floorspace, as this suggests that existing convenience goods providers in the Study Area are stretched and overproviding to meet the existing need. These sums, together with the additional spend generated by the growing population of MEA Borough over the period 2018-2030, therefore provides the 'surplus expenditure' shown in Table 6 at Appendix D.
- 4.16** Based on the household survey, we identify in Tables 3-5 that convenience retailers in the Borough turnover an estimated £314.9m. This is significantly higher than the benchmark turnover of £209.4m (see Table 5 at Appendix D). Once inflow expenditure is taken into account, this overtrade equates to £116.2m of additional expenditure across the Borough at 2018 (see Table 5). Put another way, the combined existing convenience stores are trading at around 55% above company average expectations. Figure 4.1 identifies a surplus of £116.2m expenditure in 2018, increasing to £123.1m by 2030.

Figure 4.1 / Gross Additional Convenience Goods Capacity in Mid & East Antrim

Year	Benchmark Turnover (£m) ¹	Survey Turnover (£m) ²	Inflow (£m)	Designated Centre Overtrading (£m)
2018	209.4	314.9	10.7	116.2
2022	209.0	316.8	10.8	118.5
2026	209.2	319.1	10.9	120.7
2030	210.1	322.2	11.0	123.1
Borough Market Share (%)		67.1		

¹ Benchmark for stores and centres in Borough. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15 (December 2017)

² Assumes constant market share claimed by Borough facilities at 67.1% from Study Area expenditure (assumes no inflow)
Source: Table 6a, Appendix D

- 4.17** We then consider committed and extant planning permissions for new convenience floorspace across the Borough. Three extant planning permissions have been taken into account including a proposed demolition and reconstruction of a supermarket, and a proposed new M&S Outlet Store, both to be located at Belfast Road outside of Carrickfergus Town Centre. The commitments also take into account the erection of a farm shop to the south of Galgorm Castle.

- 4.18** These commitments are deducted from the surplus expenditure set out in Figure 4.2. Once accounted for, we are able to calculate the net additional convenience goods capacity for Mid & East Antrim Borough.

Figure 4.2 / Net Additional Convenience Goods Capacity in Mid & East Antrim Borough

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2018	116.2	11.1	105.0	9,000	11,500
2022	118.5	11.1	107.4	9,200	11,700
2026	120.7	11.1	109.6	9,300	11,900
2030	123.1	11.2	112.0	9,500	12,100

Source: Table 6d, Appendix D

¹ Average sales density assumed to be £11,605 per sq m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2016

² 50% of residual expenditure assumed to be consumed by leading four supermarkets (£11,605 sq m) and 50% assumed to be consumed by discount operators (£6,670 per sq m) as identified by Verdict 2016. This equates to £9,137/sq m

- 4.19** Taking account of committed turnover (see table 6c at Appendix D), we identify a residual expenditure at 2018 of £105.0m, growing to £112.0m by 2030.
- 4.20** Using average sales densities to calculate a minimum floorspace scenario (a large supermarket operator) and a maximum floorspace scenario (a combination of discount foodstores and larger supermarket operators), we calculate that there is capacity in the Borough for additional convenience goods, ranging between 9,000 sq m and 11,500 sq m in 2018, and between 9,500 sq m and 12,100 sq m in 2030.
- 4.21** We then take the Borough-wide figure and look at how this capacity might be distributed on a town-by-town basis. This exercise is carried out in Tables 6e – 6t at Appendix D. We apportion the floorspace capacity based on existing market share of the Borough. This exercise shows that stores and centres in the Borough attract 67.1% (£314.9) of the total available convenience goods expenditure of residents of the Study Area (£469.0). This market share is broken down as follows between the towns of the Borough:

- Ballymena – 27.2%
- Carrickfergus – 18.7%
- Larne – 11.3%
- Rest of the Borough – 10.0%

4.22 For the purposes of this exercise, all foodstores within each town's settlement area have been included to obtain the market share. For example, the Tesco Superstore located at Larne Road Link in Ballymena, is not included within the town centre boundary, but has been included in the Ballymena market share calculation.

4.23 Based on these constant market shares through until 2030, convenience goods floorspace capacity in the Borough is divided as shown in Figure 4.3. The results show that the majority of forecast capacity would be diverted in similar proportions to Carrickfergus and Larne, while a larger amount apportioned to Ballymena. There are negative capacities shown for the rest of the Borough. We discuss the apportionment of convenience goods capacity further in Chapter 5.

Figure 4.3 / Convenience Goods Floorspace Capacity in Mid & East Antrim Borough, by Town

Year	Surplus Expenditure (£m)	Surplus Expenditure (£m)	Commitments (£)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
					Min ¹	Max ²
2018	Ballymena	53.5	2.2	51.3	4,400	5,600
	Carrickfergus	35.3	9.0	26.4	2,300	2,900
	Larne	25.7	0.0	25.7	2,200	2,800
	Rest of Borough	1.7	0.0	1.7	100	200
	Borough Total	116.2	11.1	105.0	9,000	11,500
2022	Ballymena	54.4	2.2	52.2	4,500	5,700
	Carrickfergus	36.0	8.9	27.1	2,300	3,000
	Larne	26.1	0.0	26.1	2,200	2,800
	Rest of Borough	2.0	0.0	2.0	200	200
	Borough Total	118.5	11.1	107.4	9,200	11,700
2026	Ballymena	55.3	2.2	53.1	4,500	5,800
	Carrickfergus	36.6	8.9	27.7	2,300	3,000
	Larne	26.4	0.0	26.4	2,200	2,900
	Rest of Borough	2.4	0.0	2.4	200	300
	Borough Total	120.7	11.1	109.6	9,300	11,900
2030	Ballymena	56.3	2.2	54.1	4,600	5,900
	Carrickfergus	37.3	9.0	28.3	2,400	3,100
	Larne	26.8	0.0	26.8	2,300	2,900
	Rest of Borough	2.7	0.0	2.7	200	300
	Borough Total	123.1	11.2	112.0	9,500	12,100

Source: Appendix D (Tables 6a – 6t)

Capacity for Future Comparison Goods Floorspace

- 4.24** The methodology for calculating capacity for comparison goods floorspace differs from that used to model capacity for convenience goods floorspace. The principal reason for this is that there are no robust, industry standard benchmark sales densities for calculating the turnover of smaller independent retailers that typically make up the majority of the comparison provision of town centres (although it is noted that Mintel Retail Rankings do provide published sales densities for national multiple comparison retailers). Moreover, the trading levels of comparison retailers can fluctuate significantly

depending on a number of localised variables, most notably the location of the retailer relative to similar providers (as customers are likely to link multiple comparison goods trips to retailers in close proximity to each other).

- 4.25** As such, we adopt a standard approach that comparison goods retailers across the Study Area are trading 'at equilibrium' at 2018, meaning that we adopt the survey derived turnover of each facility, and examine capacity by measuring the growth in available expenditure to 2030.

Figure 4.4 / Gross Additional Comparison Goods Capacity in Mid & East Antrim

Year	Total Survey Turnover (£m) ¹	Borough Turnover (£m) ²	Inflow (£m)	Surplus Expenditure (£m)
2018	358.0	347.0	11.0	0.0
2022	384.8	385.8	12.2	13.2
2026	420.6	439.3	13.9	32.6
2030	458.9	501.7	15.8	58.6
Borough Market Share (%)		53.1		

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15 (December 2017)

2. Assumes constant market share claimed by Mid and East Antrim facilities at 53.1% from the Study Area

- 4.26** Figure 4.4 identifies a surplus of £13.2m by 2022, £32.6m in 2026 and £58.6m in 2030.
- 4.27** We then consider committed and extant permissions for new comparison retail floorspace across the authority areas that could come forward over the next few years. This includes any developments which are currently under construction, or have opened since February 2018, and so would not have been operating at the time of the household telephone survey.
- 4.28** In total, these committed developments equate to a net comparison goods floorspace of 1,011 sq m and an estimated turnover of £4.5m (see Table 26c at Appendix D). The most notable development is a proposed mixed use development with retail units at the ground floor and residential above, equating to 470 sq m of comparison goods floorspace to be located on Broadway Avenue, Ballymena.
- 4.29** These commitments are deducted from the surplus expenditure set out in Figure 4.4. Once accounted for, we are able to calculate the net comparison goods capacity. This is set out in Figure 4.5.

Figure 4.5 / Net Additional Comparison Goods Capacity in Mid & East Antrim Borough

Year	Surplus Expenditure (£m)	Commitments (£m) ⁴	Residual Expenditure (£m) ³	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2018	0.0	4.5	-4.5	-800	-1,300
2022	13.2	5.1	8.1	1,300	2,100
2026	32.6	5.8	26.8	3,800	6,000
2030	58.6	6.6	52.1	6,600	10,300

Source: Table 26d, Appendix D

1. Average sales density assumed to be £5,500 per sq m which Nexus Planning considers to be towards the higher end of what could be achieved in Mid & East Antrim

2. Average sales density assumed to be £3,500 per sq m which Nexus Planning considers to be towards the lower end of what could be achieved in Mid & East Antrim

3. 'Residual Expenditure' calculated by subtracting turnover of commitments (sourced from Table 26c) from surplus expenditure (sourced from Table 26a)

4. 'Commitments' allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15 (December 2017)

4.30 Taking account of committed turnover (see Table 26c at Appendix D), we identify residual expenditure ranging from £-4.5m in 2018 to £8.1 in 2022, £26.8m in 2026, and £52.1 in 2030. Positive capacity is forecast as the turnover of the range of commitments is less than the amount of expenditure growth.

4.31 Using average sales densities to calculate a minimum floorspace scenario (£3,500/sq m at 2018) and a maximum floorspace scenario (£5,500 /sq m at 2018), we calculate that there is capacity in the Borough for additional comparison goods, as identified in Figure 4.5. This is after factoring in the current range of committed developments. Population and expenditure growth are higher than projected turnover efficiency of commitments, and therefore there is positive floorspace capacity to 2030.

4.32 In a similar fashion to our assessment of convenience goods, we then take the Borough-wide figure and look at how this capacity might be distributed on a town-by-town basis. This exercise is carried out in Tables 26e – 26t at Appendix D. We apportion the floorspace capacity based on existing market share performance from the Study Area. This exercise shows that stores and centres in the Borough attract 53.1% (£358.0) of the expenditure carried out by residents of the Study Area (£635.5m). This market share is broken down as follows between the towns of the Borough:

- Ballymena – 40.2%
- Carrickfergus – 3.3%
- Larne – 8.0%

- Rest of the Borough – 1.5%

4.33 Based on these constant market shares through until 2030, comparison goods floorspace capacity in the Borough is divided as shown in Figure 4.6. The results show that while there is zero capacity or negative capacity forecast for 2018 in all locations, there will be a small amount of capacity floorspace at the end of the plan period in Carrickfergus, Larne and the rest of the Borough, and a larger amount of floorspace capacity in Ballymena.

Figure 4.6 / Comparison Goods Floorspace Capacity in Mid & East Antrim Borough, by Town

Year	Surplus Expenditure (£m)	Surplus Expenditure (£m)	Commitments (£)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
					Min ¹	Max ²
2018	Ballymena	0.0	3.8	-3.8	-700	-1,100
	Carrickfergus	0.0	0.7	-0.7	-100	-200
	Larne	0.0	0.0	0.0	0	0
	Rest of Borough	0.0	0.0	0.0	0	0
	Borough Total	0.0	4.5	-4.5	-800	-1,300
2022	Ballymena	10.1	4.1	6.0	1,000	1,500
	Carrickfergus	0.8	0.8	0.0	0	0
	Larne	1.9	0.0	1.9	300	500
	Rest of Borough	0.4	0.0	0.4	100	100
	Borough Total	13.2	5.1	8.1	1,300	2,100
2026	Ballymena	25.0	6.4	18.5	2,600	4,200
	Carrickfergus	2.0	0.9	1.1	200	300
	Larne	4.7	0.0	4.7	700	1,100
	Rest of Borough	0.9	0.0	0.9	100	200
	Borough Total	32.6	5.8	26.8	3,800	6,000
2030	Ballymena	44.9	7.3	37.6	4,700	7,400
	Carrickfergus	3.6	1.0	2.6	300	500
	Larne	8.5	0.0	8.5	1,100	1,700
	Rest of Borough	1.6	0.0	1.6	200	300
	Borough Total	58.6	6.6	52.1	6,600	10,300

Source: Appendix D (Tables 26a – 26t)

Capacity for Future Leisure Floorspace

Introduction

- 4.34** The leisure market has undergone drastic structural changes over the past few years. The economic downturn of 2008 to 2013 significantly changed consumers' spending behaviours. Even though overall spending was down, the popularity of going to the cinema or theatre has steadily increased, as has eating out at restaurants, cafés, or purchasing takeaway meals. Additionally, as the health and fitness world flourishes, the number of fitness centre memberships has steadily increased. ONS reported that in 2006 average weekly spend on 'sports admissions, subscriptions, leisure class fees and equipment hire' was £5.80 and in 2017 it had increased to £7.10. Further commentary on recent and emerging leisure trends is included in Section 2 of this report.
- 4.35** The results of the NEMS Household Survey offer an indication of locations/facilities where residents of the Study Area satisfy their leisure and cultural needs. As such, the Survey enables us to analyse patterns of travel and potential deficiencies (those that are qualitative in nature) in the Borough.
- 4.36** The modelling of future commercial leisure need cannot necessarily be based upon the same quantitative model used to estimate retail need, by estimating future expected expenditure. This is because leisure spending is not undertaken regularly and is typically influenced by external factors. The inherent nature of restaurant, café and bar spending is that it is often undertaken whilst travelling, on holidays and day trips and for special occasions and, as such, patterns of spending are generally dispersed widely across and, in part, beyond the Study Area.
- 4.37** We also appraise the existing provision of leisure facilities across the authority areas, and compare this against recognised sector 'standards' or 'benchmarks'. The completion of this 'benchmarking exercise' allows us to establish deficits and where gaps in the provision of existing facilities may be.
- 4.38** We go on now to assess capacity for the following leisure activities:
- Health and fitness;
 - Cinema; and
 - Ten pin bowling.

- 4.39** In order to identify capacity for leisure activities, we utilise population projections for each zone. As Zones 1-6 have been identified to broadly represent the Borough, leisure capacity is based on the combined population of these zones, and projected forward to identify capacity for 2018, 2022, 2026 and 2030.

Health and Fitness Capacity

- 4.40** A May 2018 report from, the Leisure Database Company⁴¹ identifies that the level of health and fitness clubs in the UK is higher than it has ever been before, with more clubs and more members. In terms of membership rates across the whole of the UK, the Leisure Data Base Company outlines that 14.9% of the UK's population are registered members at private health and fitness clubs meaning that 1 in every 7 people is a member of a gym. In 2018 there were in the region of 7,038 health and fitness clubs operating across the UK (up from 6,728 in 2017). The biggest area of growth has come from low cost gyms.
- 4.41** In 2017, the UK population was calculated at 66.2 million⁴², and therefore, we calculate there to be on average one club for every 9,839 persons. We use this average to calculate the health and fitness requirement for the Borough in Figure 4.7.
- 4.42** As outlined at the beginning of this chapter, when estimating the potential requirement for additional health and fitness facilities in the authority areas, we have considered only the capacity within Zones 1-6. The reason for this is that it is typical customer behaviour to travel shorter distances to seek out health and fitness facilities in convenient locations close to their home or place of work compared to other leisure facilities (e.g. cinema, bowling, theatre). Such trips are likely to be completed by a single person on a regular basis - i.e. one to two times a week, as shown by the household survey. The type and frequency of trips varies greatly for cinema and ten pin bowling activities. Visits to these kinds of leisure facilities are typically completed on a much less frequent basis and undertaken by groups of people and/or families. As a consequence, participants in cinema or ten pin bowling activities are more willing to travel further distances.
- 4.43** The household survey results suggest that 70.2% of residents within Zones 1-6 currently carry out their health & fitness activities within the Borough. We term this the 'retention rate', and use it as a

⁴¹ State of the UK Fitness Industry 2018, Leisure Database Company, May 2018

⁴² Extrapolation of data by United Nations, Department of Economic and Social Affairs, Population Division, World Population Prospects: The 2017 Revision, 2018

benchmark (assumed to be constant) to underpin our assessment of the number of additional facilities that can be supported in the Borough over time.

- 4.44** Zones 1-6 have an identified estimated population of 167,020 in 2018, increasing to 171,632 by 2030. Based on the current retention rate identified above, we calculate that the authority areas could support around 12 health and fitness clubs at the current time, remaining the same until 2030.

Figure 4.7 | Health and Fitness Centre Requirement

Year	Zones 1-6 Population	Retention of Health and Fitness Trips	Typical Population Required to Support Centre ¹	Potential No. of Clubs Supported by the Area
2018	167,020	117,248	9,839	11.9
2022	169,080	118,694	9,839	12.1
2026	170,313	119,560	9,839	12.2
2030	171,632	120,486	9,839	12.3

¹ Note: Typical population to support a health and fitness club derived from the Leisure Database Company Research (2017)

- 4.45** There are three publically run leisure centres within Mid and East Antrim Borough including Seven Towns Leisure Centre in Ballymena, Amphitheatre Wellness Centre in Carrickfergus, and Larne Leisure Centre. Research conducted by Nexus indicates that there are another 29 health and fitness clubs within the Borough. These are varying in size and include a mix of chain and independent clubs.
- 4.46** This brings the total health and fitness centre provision to 32 different facilities across the Borough. It is also important to note that there will also be a limited number of smaller clubs that have not been captured as part of this assessment.
- 4.47** The current provision of 32 health and fitness facilities across the borough is well above the existing demand for 12 health and fitness clubs. As there is limited population growth over the 12 year period to 2030, limited additional demand is forecast by 2030.

4.48 In summary, we would not recommend that the Council plan for any further facilities at this time. Notwithstanding this, and in keeping with SPPS policy on encouraging healthy activities, the Council should assess the principle of new health and fitness developments coming forward on their own merits.

Cinema Capacity

4.49 The Borough has the following cinemas:

- IMC Multiplex Cinema, Ballymena (7 screens)
- Omniplex Cinemas, Carrickfergus (6 screens)
- Omniplex Cinemas, Larne (8 screens)

4.50 The NEMS Household Survey outlines that cinemas across the Borough attract 80.1% of all cinema trips made by residents of Zones 1-6. In 2016, the Cinema Advertising Association identified that total cinema admissions were 168.3 million with the national average being 2.6 trips per person.

4.51 The Cinema Advertising Association identifies 788 cinema facilities with 4,194 screens in the UK. Lichfield's Cinescope database identifies approximately 800,000 cinema seats in the UK. In 2016 (the most recently available public data) the national yearly average was 210 trips per seat or 40,000 cinema trips per screen.

4.52 As shown in Figures 4.8, in order to gauge the number of cinema screens that can be supported by the Borough, we have calculated the anticipated cinema attendance (based on the national average of 2.6 trips per person). The Borough's current cinema trip retention has also been taken into account (80.6% of all cinema trips).

Figure 4.8 / Cinema Capacity

Year	Zones 1-6 Population	Number of Cinema Visits per Person pa	Total Cinema Attendance pa	Cinema Trip Retention	Trips per Screen	Cinema Screens Supported by the Area
2018	167,020	2.6	434,252	351,744	40,000	8.8
2022	169,080	2.6	439,608	356,082	40,000	8.9
2026	170,313	2.6	442,814	358,679	40,000	9.0
2030	171,632	2.6	446,243	361,457	40,000	9.0

Source: Lichfields Cinescope, 2016

- 4.53** Our benchmarking exercise in relation to population growth, estimates that (taking retention rates into account) there would be around 434,252 admissions in 2018, and that by 2030 this would increase to around 446,243 admissions. Based on the national average of 40,000 trips per screen, we are then able to calculate the number of screens that can be supported in the area.
- 4.54** Figure 4.8 illustrates that 8 cinema screens can be supported by Zones 1-6 in 2018, increasing to 9 cinema screens in 2030. At present there are three cinemas in the Borough, providing a total of 21 screens in total, which, if utilising national averages, is well above the requirement for the Borough. As such, we would not recommend that any additional cinemas are planned for in the Plan period.

Ten Pin Bowling Capacity

- 4.55** Mintel is a global provider of Market Research, who provide information on trends and insight in the leisure sector. In terms of data on ten pin bowling trends in the UK, they are one of the only providers. As such, we have looked to Mintel research to provide a general indication of the average number of ten pin bowling lanes per resident in the UK.
- 4.56** Ten pin bowling has generally experienced a decline over the last decade, with a gradual reduction in the number of facilities. In 2014, Mintel identified that there were 5,617 bowling lanes⁴³, a decrease since 2011 where 5,773 bowling lanes were identified. Taking into account the UK population at the time this data was produced (64.6 million⁴⁴), this equates to one lane for every 11,500 persons. We set this analysis out for the Borough in Figure 4.9.

⁴³ 'Tenpin Bowling – UK' Mintel, May 2014

⁴⁴ 'Tenpin Bowling – UK', Mintel, November 2011

- 4.57** There are presently no ten pin bowling destinations within MEA Borough or within the Study Area and therefore the Borough does not have a retention rate. The most popular destination for ten pin bowling with respondents to the Household Survey was Glengormley Sportsbowl in Newtownabbey.

Figure 4.9 / Ten Pin Bowling Capacity

Year	Zones 1-6 Population	Retention of Ten Pin Bowling Trips	Typical Population Required to Support Lane	Potential No. of Lanes Supported by the Area
2018	167,020	-	11,500	14.5
2022	169,080	-	11,500	14.7
2026	170,313	-	11,500	14.8
2030	171,632	-	11,500	14.9

Source: Tenpin Bowling – UK, Mintel

- 4.58** Figure 4.9 indicates that if the Borough were to retain 100% of visits to Ten Pin Bowling destinations, that there is presently the capacity for a facility with 15 bowling lanes. However, as there are a number of ten pin bowling facilities outside of the Study Area, we cannot assume that a new facility would actually retain 100% of trips. Notwithstanding, capacity for a small bowling facility does exist.
- 4.59** It should also be noted that certain parts of the Borough were particularly eager to see a new Ten Pin Bowling facility, as seen in the results in the results of the NEMS Household Survey. 4.7% of all respondents, and in particular, 13.0% of respondents from Zone 5 – Larne, indicated that they wished to see a new or improved ten pin bowling facility (Figure 3.22).
- 4.60** However, with demand falling in general, and with there being a number of nearby alternatives outside the Study Area, we would not recommend that the Councils plan for any specific facilities at this time. Should investors come forward within the Borough for a new facility, we would recommend considering the application on its merits.

Summary

- 4.61** This chapter of the report has identified whether there is capacity in the Borough for new retail and leisure floorspace over the plan period to 2030. The conclusions drawn here are supported by the detailed quantitative retail capacity tables that are enclosed at Appendix D.

Convenience Goods

- 4.62** For convenience goods, we identified that there is additional capacity for convenience goods floorspace over the Plan period. A number of existing foodstores within the Borough are evidenced to be significantly over-trading and, together with expenditure growth over time, this creates the potential for more floorspace to be added.
- 4.63** Taking account of committed turnover (see table 6c at Appendix D), we identify a residual expenditure at 2022 of £87.9m, growing to £94.8m by 2030.
- 4.64** Using average sales densities to calculate a minimum floorspace and a maximum floorspace scenario, we have calculated that there is capacity in the Borough for additional convenience goods, ranging between 9,000 sq m and 11,500 sq m in 2018, and between 9,500 sq m and 12,100 sq m in 2030.
- 4.65** When considering capacity for the three main towns we find that by 2030 there is between 4,600 sq m and 5,900 sq m of convenience floorspace capacity in Ballymena, between 300 sq m and 2,400 sq m of convenience floorspace capacity in Carrickfergus, and between 2,300 sq m and 2,900 sq m of convenience floorspace capacity in Larne

Comparison Goods

- 4.66** Our comparison goods floorspace capacity forecasting has identified that there is capacity for comparison goods floorspace within the Borough over the Plan period.
- 4.67** Taking account of committed turnover, we identify residual expenditure ranging from -£4.50m in 2018, £8.1m in 2022, £26.8m in 2026, and £52.1m in 2030. Positive capacity is forecast as the turnover of the range of commitments is less than the amount of expenditure growth.
- 4.68** We calculate that by 2030 there is floorspace capacity ranging between 6,600 sq m and 10,300 sq m in 2030 across the Study Area. When considering capacity for the three main towns we find that by 2030

there is between 4,700 sq m and 7,400 sq m of comparison floorspace capacity in Ballymena, between 300 sq m and 500 sq m of comparison floorspace capacity in Carrickfergus, and between 1,100 sq m and 1,700 sq m of comparison floorspace capacity in Larne.

Leisure

- 4.69** The modelling of future commercial leisure need cannot necessarily be based upon the same quantitative model used to estimate retail need, by estimating future expected expenditure. This is because leisure spending is not undertaken regularly and is typically influenced by external factors. Leisure spending is in general, more dispersed and less predictable than spend on convenience and comparison goods.
- 4.70** Additionally, public houses, restaurants and bars are typically accommodated in smaller units. By virtue of their smaller size, the market can generally deliver units of this scale unaided by intervention through the development plan process as allocations. Therefore we have not provided a quantitative leisure capacity forecast.
- 4.71** We have provided an assessment of capacity for those leisure activities for which there is a regularity of use; being health and fitness centres, cinema screens and ten pin bowling lanes. Our assessment has concluded that there is no additional capacity for health and fitness, or cinema screens, but there may be a small amount of capacity for bowling lanes.

5.0 Policy & Proposals Guidance

Introduction

- 5.1** This Retail and Commercial Leisure Need and Capacity Study has been instructed to inform the evidence base to support the emerging local development plan being prepared for Mid & East Antrim Borough for the period to 2030.
- 5.2** In the preceding chapters of this Study we have considered the health of existing centres within the Borough, where residents currently travel for to their retail and leisure needs, and, based on an assessment of existing market shares and population/ expenditure growth, what potential cumulative capacity there is for additional retail and leisure floorspace within the Borough.
- 5.3** This chapter provides a series of recommendations relating to the future of retail and leisure development in the Borough. The brief has asked us to make recommendations on appropriate development management policies for the following areas:
- The role played by the retail, retail services, and leisure sectors in sustaining the vitality and viability of town centres;
 - The retail hierarchy (including the potential designation of district and/or local centres within the plan area);
 - The definition of town centre boundaries (including the definition of a primary retail core / primary and secondary frontages within each main town).
- 5.4** For each of the topics above, we provide discussion and where appropriate, suggested or example development management policies. These policies may be amended where Borough specific nuance requires. It is envisaged that strategic, overarching policies relating to the likes of town centre first strategy, retail assessment and the retail hierarchy may be incorporated into the Plan Strategy document. Policies relating to the definition of town centre boundaries and other, more specific development guidance, would be included in the Local Policies Plan document. Specific discussion around the three main town centre boundaries, will be addressed in the Local Policies Plan Addendum Report.

- 5.5** In addition to providing guidance regarding appropriate development management policies, and in the first instance, we provide general recommendations based on the capacity findings of the study to set the scene for the future of retail development within MEA Borough.

General Recommendations

- 5.6** General recommendations based on our capacity findings for convenience, comparison and leisure floorspace are provided below. Recommendations relating specifically to the three main town centres are included in Chapter 3 of this report.

- There is quantitative capacity for more convenience goods floorspace, but a 'town centre first' approach should be followed. Ballymena Town Centre, Carrickfergus Town Centre and Larne Town Centre were all identified as locations for additional convenience floorspace.
- There is quantitative capacity for more comparison goods floorspace to 2030. However, as there is some uncertainty around the forecasting for comparison goods retailing, the Council should be considered in their assessment of sizable comparison goods proposals for new floorspace and ensure a rigorous 'town centre first' approach is applied. Filling existing vacant retail units in all three main town centres as a priority. The Council should not actively promote any further comparison goods floorspace outside of town centre locations.
- There is limited capacity for commercial leisure floorspace to 2030, with our review of provision of health and fitness centres and cinema screens showing that there is currently an oversupply. There is currently no ten pin bowling destination within the Borough, however as interest in ten pin bowling is shown generally to be declining, any future plans for ten pin bowling centre should be tentative and market driven.

Retail, Retail Services and Leisure in Town Centres

- 5.7** Building on our discussion in Chapter 2 of this Study, we know that the future vitality and viability of town centres is reliant on policy that supports town centres as places that people go to both for traditional shopping, but also to spend time. Encouraging activities which cannot be bought online, and which still require the consumer to physically visit a store is becoming increasingly important in 'future proofing' town centres. As a result, planning policy has to reflect these changing tides.

- 5.8** While traditional convenience and comparison retail are still an integral function of the town centre, in the wake of changing consumer shopping patterns and the rise of online shopping, we are increasingly finding that retail services (nail salons, dry cleaners, post offices etc.), and leisure services (restaurants, cafes, bars, pubs and cinemas etc.) are important footfall generators. Such services are becoming more prominent and important in maintaining the vitality and viability of town centres as consumer behaviour continues to change. With this in mind, it is important that within town centres the overall mix of units is diverse so as to avoid overreliance on any particular type of shop or service. For example, while retail services can be important footfall generators, having an oversupply of some types of retail service can result in a poor perception of that centre. In the healthiest centres, a balance is struck.
- 5.9** In addition to being vulnerable to shopping patterns and behavioural trends, town centres have suffered as a result of out-of-centre retail developments. These developments are often 'one-stop-shops' and are easily accessible by car, meaning visitors don't need to travel into the town centre. In order to support the ongoing the viability and vitality of town centres, planning policy is required to adopt a 'town centre first' approach that requires the developer to give preference to development for town centre uses in town centre locations.
- 5.10** In MEA Borough, in which we have found that there is a reliance on out-of-centre shopping destinations and a very high proportion of vacant units in the main town centres, directing retail, retail services and leisure to Ballymena, Carrickfergus and Larne town centres is an important step in improving the overall outlook of those centres. In addition, town centre uses can be directed towards other, lower tier centres with an important role in the retail hierarchy, as part of a planned town centre first approach.
- 5.11** Example text for a town centre first policy is provided below, as based on Paragraph 6.281:

Town Centre First

All applications for main town centre uses are to be considered in the following order of preference (and consider all of the proposals catchment):

1. town centres;
2. edge of centre; and
3. out of centre locations.

5.12 A policy such as the above could be supported by the following example text:

Development within the designated town centres will be permitted provided that it maintains their primary retail function and wider role as a focus for business, leisure, cultural and other appropriate town centre uses. Retail activity elsewhere should be focussed within lower tier centres, which will be expected to retain a core of local shopping facilities and accommodate any new retail development, commensurate to their position in the retail hierarchy. Proposals for main town centre uses will be considered in accordance with the SPPS, including the application of the sequential test as appropriate.

5.13 In addition to the town centre first policy, policy mechanisms for ensuring that town centre uses are directed to town centre sites include need, sequential and impact tests.

5.14 In the first instance, need for the proposed retail provision is assessed both quantitatively and qualitatively. The assessment takes account of factors including the needs of the local town, committed development proposals, and allocated sites.

5.15 The sequential test is used to identify where preferable sites exist in town centres to accommodate main town centre uses. Through the sequential test, development that cannot be located in town centres would be identified, which would then also be subject to the impact test. The impact test determines whether there would be likely significant adverse impacts of locating main town centre development outside of existing town centres (and therefore whether the proposal should be refused in line with policy). The SPPS is clear at paragraph 6.290 about factors to be addressed in any impact assessment.

5.16 While the threshold for impact assessment is set by the SPPS at 1,000 sq m gross external floor area, we would recommend reviewing this threshold in the case of MEA Borough. In the context of the part-rural nature of the Borough, a lower threshold could be considered for smaller centres which are always more vulnerable to significant developments outside their core.

- 5.17** In addition, we have reviewed the impact assessment threshold for Ballymena, Carrickfergus and Larne. While these towns are much more substantial than the lower order centres in the Borough, they may still be vulnerable to larger out of centre developments. The two indicators we have used to consider a reduced impact threshold are the proportion of vacant units and the average unit size.
- 5.18** The first indicator, proportion of vacant units, has been used as it provides a good indication of the vitality and viability of that town centre. A particularly high vacancy rate suggests a town may be more vulnerable to out-of-centre development.
- 5.19** The second indicator relates to the average unit size within each of the town centres. This indicator is used as it provides a broad picture of the existing stock of units within Ballymena, Larne and Carrickfergus. Where a centre had a particularly low average unit size, an Applicant may argue that a larger scale unit outside of the town centre would not compete with the smaller units in the town centre. However, in the case of a town centre such as Carrickfergus, which has the lowest average unit size and the highest vacancy rate of the three towns, a large scale out-of-centre retail development is more likely to have an adverse impact on the town centre, and therefore a lower threshold can help to ensure a thorough assessment of retail impact is applied. Figure 5.1 provides a breakdown of the two indicators for Ballymena, Carrickfergus and Larne.

Figure 5.1 / Impact Assessment Review Indicators

Town Centre / Indicator	Proportion of Vacant Units (%)	Average Unit Size (sq m) ¹
Ballymena	20.7	263.9
Carrickfergus	28.6	186.9
Larne	21.8	202.3

Source: Proportion of Vacant Units – Mid & East Antrim Borough Council, 2018. Average Unit Size – Experian, 2018

¹ Average unit sizes derived using Experian Goad mapping. Goad boundaries may differ from adopted town centre boundaries.

- 5.20** Considering the particularly high proportion of vacant units (28.6%) and the low average unit size of 186.9 sq m, it is considered that a 500 sq m threshold could also be applied to Carrickfergus. It has been noted throughout this Study that Carrickfergus has been identified as being particularly vulnerable. In addition to the high proportion of vacant units in the town centre, Carrickfergus has struggled due to constraints relating to the historic nature of the centre and designated conservation area, as well as limited available development sites, and is therefore in need of ongoing regeneration

and revitalisation. Therefore the development of town centres uses upwards of 500 sq m and outside of Carrickfergus Town Centre may also have an undue impact on the already suffering town centre.

5.21 Similarly, although not so dramatically, Ballymena and Larne each have a high proportion of vacant units. Their average unit size within those town centres is also considered to be low, though not so low as in Carrickfergus. Therefore, we consider that the development of town centre uses upwards of 750 sq m outside of Ballymena and Larne may have an undue impact on the vitality of those town centres.

5.22 Based on the assessment above we have drafted an example policy that includes provision to require a Retail Assessment for development with a gross external area above 750 sq m outside of Ballymena and Larne town centres, and above 500 sq m for the remainder of out of centre locations in the Borough.

Retail Assessment for Town Centre Uses in Out-Of-Centre Locations

Retail development outside of identified centres in the retail hierarchy will only accord with the Plan where it has been demonstrated that there are no suitable, available and viable sites within centres as identified in the retail hierarchy through application of the sequential test, and that there would be no significant adverse impact on any centre in the retail hierarchy.

Favourable consideration will be given to edge of centre sites before out of centre locations and provided it has been demonstrated that there is a need for the retail provision and that there will be no significant adverse impact on the existing centre. The assessment of need should incorporate a quantitative and qualitative assessment taking account of the needs of the local town, committed development proposals, and allocated sites.

Any proposed development above the threshold identified below, and outside a centre as identified in the retail hierarchy, will be accompanied by a Retail Assessment.

- Above 750 sq m gross external area within the settlement boundaries of Ballymena and Larne;
- Above 500 sq m gross external area within all other out of centre locations in the Borough.

The Retail Assessment should provide a proportionate response to the proposal being sought, and should incorporate an assessment of need, impact and the sequential test.

Town Centre Boundaries and Primary Retail Core

- 5.24 The context for defining the spatial extent of centres is set out at Paragraph 6.280-6.283 of the SPPS. Town centre boundaries enable practitioners to consider the sequential, impact and needs tests when considering individual proposals for development and/or change of use. It is also relevant for consideration of the impact thresholds.
- 5.25 The range of potential delineations include:
- Primary Retail Core;
 - Town Centre;
 - Edge-of-centre; and
 - Out-of-centre.
- 5.26 In keeping with practice across the UK, edge-of-centre is defined as sites which are within a 300m walking distance of the town centre boundary, whilst out-of-centre is defined as those areas beyond that 300m. Defining suitable town centre boundaries is therefore important in this context. The Council must weigh up the advantage of having a sufficiently large defined area to cater for the likely demands of the range of existing and future town centre uses within a centre, but also the disadvantages of defining too wide an area, whereby a number of sites which are not suitable for development then fall within the edge-of-centre category. A balance must therefore be struck between the two.
- 5.27 The SPPS provides limited discussion on the merits of prescribing a Primary Retail Core or otherwise. It is discussed within the SPPS itself as being the first preference for main town centre uses, being a tool for providing an alternative basis for the measurement of 300 metres, which would otherwise be assumed from the town centre boundary.

5.28 In practice, our experience is that local authorities have utilised the Primary Retail Core definition to help designate those frontages which they are most keen to preserve in A class use, with more flexibility for other town centre uses being afforded to areas outside the Primary Retail Core, but within the Town Centre. This was borne of the PPS5 era (document now superseded) which sought to control non-retail uses at ground floor level with the Core. Given that the term 'Primary Retail Core' is carried forward into SPPS, we assume that this remains its intent and purpose.

5.29 The POP identifies at Key Issue 9, that the preferred option is:

Define a Primary Retail Core (within some or all town centres) accompanied by policy to substantially protect and promote retail uses on ground floor frontages in these areas. Designate specific sites in the town centres for mixed use development (retail and other town centre uses).

5.30 This option seeks to strengthen the retail offer in core parts of the Borough's town centres. It is important however, that a range of town centre uses are permitted in town centres to ensure their viability and vitality for the future.

5.31 In general terms, and building on our observations in Chapter 2, we consider that the future of the High Street is likely to evolve quickly, and that there is some danger in being closed to the idea of non- retail uses at ground floor level within the heart of major town centres. Any application for a change of use would need to be considered through a Planning Application in any event (where Permitted Development Rights do not apply), and so there is a significant degree of control even where there is no defined Primary Retail Core.

5.32 Specific recommendations for changes to town centre boundaries will be addressed during the preparation of the Local Policies Plan.

The Retail Hierarchy

5.33 At Paragraph 6.277, the SPPS requires LDPs to 'define a network and hierarchy of centres – town, district and local centres, acknowledging the role and function of rural centres'. The recommended retail hierarchy is provided in Figure 5.2, below. Further discussion and the rationale for the proposed retail hierarchy is provided in the Retail Hierarchy Paper attached at Appendix E.

Figure 5.2 / Recommended Retail Hierarchy

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

- 5.34 In policy terms, we would expect to see a policy within the Plan Strategy that includes the proposed retail hierarchy.
- 5.35 For each tier of the retail hierarchy, we recommend putting together a list of uses that would be acceptable in each, and drafting planning policy that will assist the Council in assessing the appropriateness of future development within those centres. It is envisaged that this policy would be included at Local Policies Plan stage. Examples are provided at Figure 5.3, but we note that the Council may wish to create bespoke policies in this regard.
- 5.36 The brief also asks us to comment on the potential designation of district and local centres. We assume that reference to district and local centres in this case is made in the context of the PPS5 (superseded by the SPPS) definitions. As discussed in the Retail Hierarchy Paper attached at Appendix E, we have recommended that the Borough draft bespoke definitions for each tier of the retail hierarchy, rather than utilising PPS5 definitions which are for the most part rendered irrelevant within MEA Borough. A

proposed description for each tier within the four tier hierarchy is included in the Recommended Retail Hierarchy for the Borough.

Development Opportunity Sites

- 5.37 At paragraph 6.286, the SPPS states that *as part of the process of identifying sites to be allocated for town centres uses in the plan councils should undertake a 'call for sites' consultation exercise*.
- 5.38 Our capacity assessment has identified that there is some capacity within the Borough to 2030 for both convenience and comparison goods floorspace. The exercise found that by 2030 there will be capacity for between 8,000 sq m and 10,300 sq m convenience floorspace, and between 6,500 sq m and 10,200 sq m comparison goods floorspace.
- 5.39 Based on this floorspace capacity, we recommend that the Council undertake a call for sites exercise. The call for sites exercise would allow the Council to identify key development sites within the three main town centres. While each of these towns has a high proportion of vacant units, development sites of an appropriate size may not be immediately obvious. The identified sites would be specifically allocated for future development, expansion or intensification.
- 5.40 By undertaking this exercise and allocating sites, the Council have a degree of control around future major developments in town centres, and the proposed range of uses that come forward. For example, the Council could use the process to promote residential-led, mixed use development. Such development might incorporate ground floor restaurants, cafés or retail units, with residential above.

Suggested Local Policies Plan Policies

- 5.41 Based on the findings and discussion throughout this Retail Study, we have provided some additional guidance around potential policies that could be included within the future Local Policies Plan as detailed in Figure 5.3. These are included below. Please note that this is not a comprehensive list of policies that should be included, but rather policies that appropriately deal with some of the issues that have been identified throughout the Study.

Figure 5.3 / Example Policy Wording

Topic	Suggested Policy Wording
Town Centre Uses	<p>Within town centres and small town centres, the following uses will be permitted:</p> <ul style="list-style-type: none"> (a) A1 (shops); (b) A2 (financial, professional and other services); (c) D1 (community and cultural); (d) D2 (assembly and leisure); (e) restaurants and cafes; (f) drinking establishments; (g) hot food takeaways. <p>Within local centres, the following uses will be permitted:</p> <ul style="list-style-type: none"> (a) A1 (shops); (b) A2 (financial and professional services); (c) D2 (assembly and leisure); (d) restaurants and cafes; (e) drinking establishments; (f) hot food takeaways. <p>Within village centres, the following uses will be permitted:</p> <ul style="list-style-type: none"> (a) A1 (shops); (b) restaurants and cafes.

Evening Economy	The Council wishes to promote a range of uses in town centres that cater for the whole community, creating a balanced evening economy including entertainment and late night retailing as well as the provision of a range of eating and drinking establishments. The quantity, type and location of restaurants and cafes, drinking establishments and hot food takeaways and other evening or late night uses will be controlled. Proposals for evening and night time economy uses will only be permitted if the Applicant can demonstrate that there is no negative impact on the amenity of adjoining or adjacent residential accommodation and non-residential uses, such as through noise disturbance, cooking smells, anti-social behaviour, and highway safety.
Residential Development in Town Centres	Residential development, where incorporated as part of a mixed use development incorporating main town centre uses may be permitted in town centres at appropriate locations (to be defined in the Local Policies Plan). Proposed mixed-use developments would need to provide an active frontage at ground floor level, to contribute to the vibrancy of the centre.
Amalgamation of Units	Amalgamation of vacant units will be permitted in the town centre, where the amalgamation is for the purposes of development of convenience and comparison units.

Glossary of Terms

Bulky Goods:	<p>Goods of a large physical nature (for example DIY, furniture, carpets) that sometimes require large areas for storage or display.</p> <p><i>Source: Planning Portal</i></p>
Capacity:	<p>Forecast resident spending within the catchment area, with which to support existing and additional retail floorspace</p> <p><i>Source: Planning Portal</i></p>
Comparison Goods:	<p>Retail items not bought on a frequent basis, for example clothes, books, and chemist goods</p> <p><i>Source: Planning Portal</i></p>
Convenience Goods:	<p>Everyday essential items, such as food</p> <p><i>Source: Planning Portal</i></p>
Edge-of-Centre:	<p>For retail purposes, a location that is well connected and up to 300 metres of the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. In determining whether a site falls within the definition of edge-of-centre, account should be taken of local circumstances</p>
Expenditure per Capita:	<p>The amount of money spent on retail goods per person in each Zone across the Study Area</p>
Expenditure:	<p>Average annual expenditure levels for various forms of goods, multiplied by the population within the defined Study Area.</p>
Experian Goad:	<p>Experian Goad is a retail property intelligence system that helps retail developers, property investors, planning professionals, and commercial agents to identify profitable locations for retail property development and investment projects. It offers comprehensive retail location plans and easy to use reports covering over 3,000 shopping areas in the UK and Ireland.</p>

Experian (MMG3):	A population, expenditure and socio-demographic dataset that utilises the 2011 Census release, projected forward by using growth rates derived from Office for National Statistics projections and current age and gender estimates.
Financial & Business Services:	An Experian Goad category comprising the likes of banks, building societies, employment agencies, legal services, estate agents and business services. <i>Source: Experian Goad</i>
Independent Retailers:	Retailers with less than 10 outlets/stores <i>Source: Experian</i>
Goad Plans:	A plan showing a bird's eye view of a retail centre including the exact location of all retail outlets and vacant premises, fascia name, retail category, and floor space. Key location factors such as pedestrian zones, road crossings, bus stops and car parks are also featured, allowing you to instantly assess the site quality of existing or prospective store locations <i>Source: Experian</i>
Leisure Services:	An Experian Goad category for town centre leisure units which includes bars, cafes, cinemas, nightclubs, take-aways, hotels, public houses and restaurants. For clarity, it does not include facilities for leisure pursuits e.g. sports centres, swimming pools or health & fitness clubs. <i>Source: Experian Goad</i>
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. <i>Source: PPS5</i>
Main Town Centre Uses:	Retail development; leisure, entertainment facilities, the more intensive sport and recreation uses (including cinemas, restaurants,

drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, culture, tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities); and residential

Market Share:

The proportion of residents that visit a particular retail destination, derived from household survey results

National Multiple:

Defined as retailers with ten or more stores/outlets

Source: Experian

Primary Retail Core:

Defined area where retail development is concentrated within a town centre

Retail Floorspace:

Total floor area of the property that is associated with all retail uses in square metres. May be expressed as a net figure (the sales area) or in gross (including storage, preparation and staff areas)

Source: Planning Portal

Retail Impact:

The potential effects of proposed retail development upon existing shops

Source: Planning Portal

Retail Services:

An Experian Goad category comprising the likes of dry cleaners, health & beauty, opticians, photo processing, post offices and travel agents.

Source: Experian Goad

Rural Centre:

A small centre, usually of a village, providing basic shopping facilities and limited community services.

Sequential Approach:

A planning principle that seeks to identify, allocate or develop certain types or locations of land before others. For example, brownfield housing sites before greenfield sites, or town centre retail sites

before out-of-centre sites

Source: Planning Portal

Sales Density:

Turnover, per square metre. Various retail planning sources such as Verdict UK Food & Grocery Company Briefing Reports and Mintel Retail Rankings provide average (or benchmark) sales densities for national multiple convenience retailers

Special Forms of Trading:

Special forms of trading (SFT) are defined as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies

Source: Experian

Study Area:

The geographical area where the household survey is carried out, based on postal sectors that make up the 8 zones that broadly cover Mid and East Antrim Borough and its immediate area.

Turnover:

Amount of sales per unit area of retail floorspace

Source: Planning Portal

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

Source: PPS5

**Nexus Planning
London**

1 Poultry
London
EC2R 8EJ

T: 020 7261 4240
nexusplanning.co.uk

