Armagh, Banbridge & Craigavon
Local Development Plan

Paper 4 : Town Centres and Opportunity Sites
May 2015

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PURPOSE

- **To provide the Planning and Regulatory Services Committee with an overview of the retail provision in Armagh, Banbridge, Craigavon and to provide information to help determine the need to formulate a detailed retail strategy to accommodate growth and enhance the vitality and viability of existing town centres up until 2030.**

CONTENT:

The paper provides:

- **The regional policy context for retailing in Armagh, Banbridge and Craigavon;**
- **A brief overview of retail trends across Northern Ireland and the UK;**
- **An overview of town centre policy within current Area Plans, an examination of current Master plans and the provision of opportunity sites including take-up;**
- **An overview of health and vitality of existing towns based on the findings of Town Centre Studies for the towns within Armagh, Banbridge and Craigavon.**

1.0 Introduction

1.1 This is the fourth of four papers aimed at:

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

1.2 The purpose of this paper is to inform the Members for Armagh Banbridge Craigavon about the nature of the current retail offer within Armagh City and the main towns in the District, the take up of town centre development opportunity sites and vacancy rates. The focus of the paper has been on Armagh, Craigavon, Portadown, Lurgan and Banbridge. In compiling the paper the main sources of information have included The Armagh Masterplan, the Craigavon Integrated Development Strategy and the Banbridge Development Strategy 2009-2015 and DOE Planning Surveys. The findings of a report by GL Hearn looking at town centres in Northern Ireland on behalf of DOE Planning in 2014 as part of the formulation of the Strategic Planning Policy Statement (SPPS) are also included in the paper. The paper allows members to commence consideration of how retail policy may be formulated within the context of the Regional Development Strategy (RDS) and the Strategic Planning Policy Statement upon Executive agreement.

2.0 Regional Policy Context

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

(a) Regional Development Strategy

2.2 The RDS 2035 is the key policy guiding development in Northern Ireland and is underpinned by a Spatial Framework and Strategic Planning Guidelines. The Spatial framework consists of urban hubs and clusters. The RDS 2035 identifies Armagh, Banbridge and Craigavon as main hubs. It states that they have the potential to form a cluster and both Craigavon and Banbridge are well positioned on two Key Transport Corridors with Armagh positioned on a Link Corridor.

2.3 Policy SFG 11 in the RDS 2035 aims to promote economic development at hubs specifically to promote and exploit the potential for economic development and consider hubs and clusters first.

- Level 1 (Villages): These are locations that will have shops primarily to meet residents daily needs (e.g.) pub, post office, petrol station. Any

growth is likely to be minimal. Consideration could be given to defining village centres in the Local Development Plan LDP.
- Level 2 (Urban or District Centres/Smaller Towns): These are locations that meet both the daily and weekly needs of surrounding residents. They offer supermarkets, restaurants and a mix of retail facilities.
- Level 3 (Regional Towns/Clusters): These are locations where the proximity of business facilitates competition from which all consumers are able to benefit and maximises the opportunity to use a means of transport other than the car. They will have shops to meet the weekly and longer term needs of residents. They will also have a mix of different activities (e.g.) shopping centres, retail warehouses, range of restaurants/bars
- Level 4 (Principal Cities): department stores, specialist shops, arts and cultural activities

2.4 It may be useful to investigate if there are any locations worthy of designation as a District or Local Centre (definition within glossary) within the ABC City / Towns. These are locations within an existing Town, usually beyond the Town Centre Boundary that provide locally accessible convenience goods to meet the daily and weekly needs of local residents.

2.5 The RDS 2035 makes specific reference to the retailing in the District. It recognises that central Craigavon has a well established retail function, a strong manufacturing and industry base and is well connected to both Belfast and Dublin. It recognises that in Banbridge the sectors with the strongest employment are manufacturing, construction and retail and that Banbridge benefits from its strategic location on the Belfast Dublin Corridor and will continue to have a key role as an important retail and commercial centre within the cluster. Although the RDS makes no specific reference to retailing in Armagh City, it does acknowledge Armagh as a rich heritage and tourism destination with an abundance of cultural product.

(b) *Draft Strategic Planning Policy Statement*

2.6 A Draft SPPS was launched for consultation on February 2014 and is intended to replace 20 different planning policy statements into 1 policy. The Draft SPPS states that there should be a town centres first approach for retailing and other town centre uses. This is reflective of the “sequential approach” introduced in Draft PPS 5 (Draft PPS5 is no longer a material consideration in the determination of planning applications and therefore has not been reviewed within this paper). The Draft SPPS also states the importance of adopting variety of uses, good urban design and accessibility within the town centre.

2.7 In preparing Local Development Plans, the draft SPPS recommends that councils should undertake an assessment of the need or capacity for retail and other main town centre uses across the plan area. A key element in developing the evidence base will be the preparation of Town Centre Health Checks. Councils should undertake and regularly update these (at least once every five years). They will contain information on a range of indicators, including, existing town centre uses, vacancy rates, physical structure and environmental quality – including opportunities, designations, constraints, footfall, retailer representation, attitudes and perceptions, prime rental values and commercial yields.

2.8 Arising from the evidence base LDPs should include a Retail strategy, and contain appropriate policies and proposals that must promote town centres first for retail and other main town centre uses. Plans should also:

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

(c) Planning Policy Statement 5 – Retailing and Town Centres

2.9 PPS 5 is the existing policy document specifically relating to retailing and town centres in Northern Ireland and will be superseded by the Draft SPPS (upon Executive agreement). Many of the themes running through PPS 5 are re-iterated in Draft SPPS. PPS 5 sets out policies for the control of retail development based on the locational relationship to existing town, district and local centres. The presumption being that town centres, particularly the primary retail core are the best location for major retail development. Therefore, in preparing development plans, the Department is required to set out retail policies in specific areas and identify locations for different types of retailing. In the main, this is achieved through the designation of town centre boundaries, primary retail cores and opportunity sites for retail development. Where appropriate, this may be supported by designating district village or local centre boundaries. The Department's main commitment is to protecting the viability and vitality of the town centre and paragraph 18 of PPS 5 states that this is done through a town centre health check.

3.0 Overview of Retail Trends in NI

3.1 As part of the preparation of the SPPS a study was undertaken by GL Hearn on behalf of DOE Planning to research issues surrounding town centres and retailing in Northern Ireland (January 2014). This included health checks for existing town / city centres as designated in adopted plans using a variety of health check indicators. This research also included an assessment of town centre and retail trends. Overall the town centre health checks did not identify any towns that were performing badly, but equally there was little evidence of any particularly strong performance. Therefore there is room for improvement in the vitality and viability of town centres and a policy stance which seeks to protect and enhance town centre performance and diversity will contribute to uplifting existing centre vitality and viability.

3.2 In compiling the GL Hearn study town centre composition data was obtained from Experian Goad who carry out physical town centre surveys and prepare occupier plans for most town centres in the UK. Some of the key findings regarding town centres in Northern Ireland included:

- Portadown has a footprint floorspace of 71,430sqm, Lurgan 56,620 sqm, Craigavon 45,410sqm, Armagh 59,280sqm and Banbridge 52,800sqm. In comparison to the rest of the UK towns, Northern Irish towns tend to have smaller catchment areas.
- Diversity of uses shows the importance of the service sector in town centres (42%), followed by non-food shops (35%). Service uses take up a larger proportion of town centres by unit number, reflecting the smaller sized units these uses tend to occupy.
- Convenience good floorspace is focused in a proportionately small number of larger units reflecting the wider UK trend of the dominance of larger supermarkets in meeting shopping needs.
- Independent operators typically comprise 76% of town centre occupiers. In most centres, independents have a strong offer in food, non-food and service sectors. Unlike many town centres in the rest of the UK, local independent food retailers remain a feature of Northern Irish towns. The Armagh, Banbridge and Craigavon area has a good representation of independent long-established family businesses offering convenience and comparison retailing and service uses.
- The proportion of other town centre uses in was notably higher in NI than the UK average. The other category includes transport services, employment and commercial activities, religious buildings, wholesale trade, civic and unclassified buildings.
- Having a range of other uses within town centres should be considered a positive attribute which confirms town centres are performing as a hub for a range of activities thereby contributing to overall vitality and viability.
- The Northern Ireland vacancy rate is notably higher, both by floorspace and unit numbers than the UK average. The 2015 vacancy rate for NI is 16.3%. Vacancy rates in Armagh, Banbridge and Craigavon are as follows: Armagh 20.37%, Banbridge 14.33%, Craigavon 5.63%, Lurgan 17.32% and Portadown 22.63% average at 18.57%
- Vacancy rates for 2013 (both by unit numbers and floorspace) are shown in the graphs below

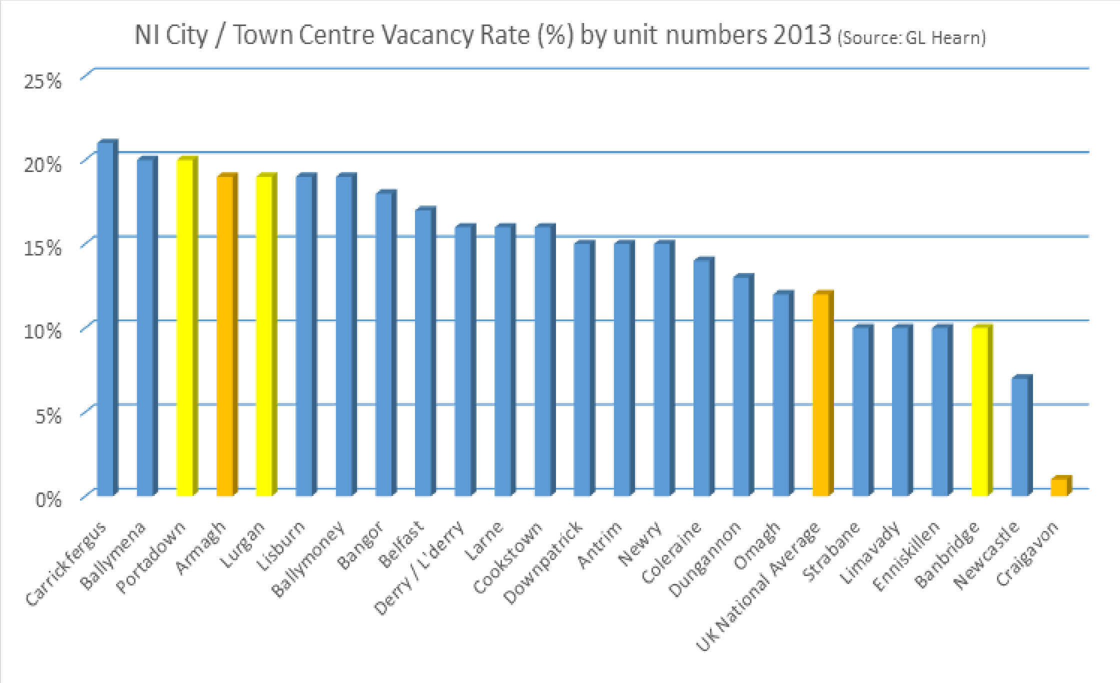


Figure 1

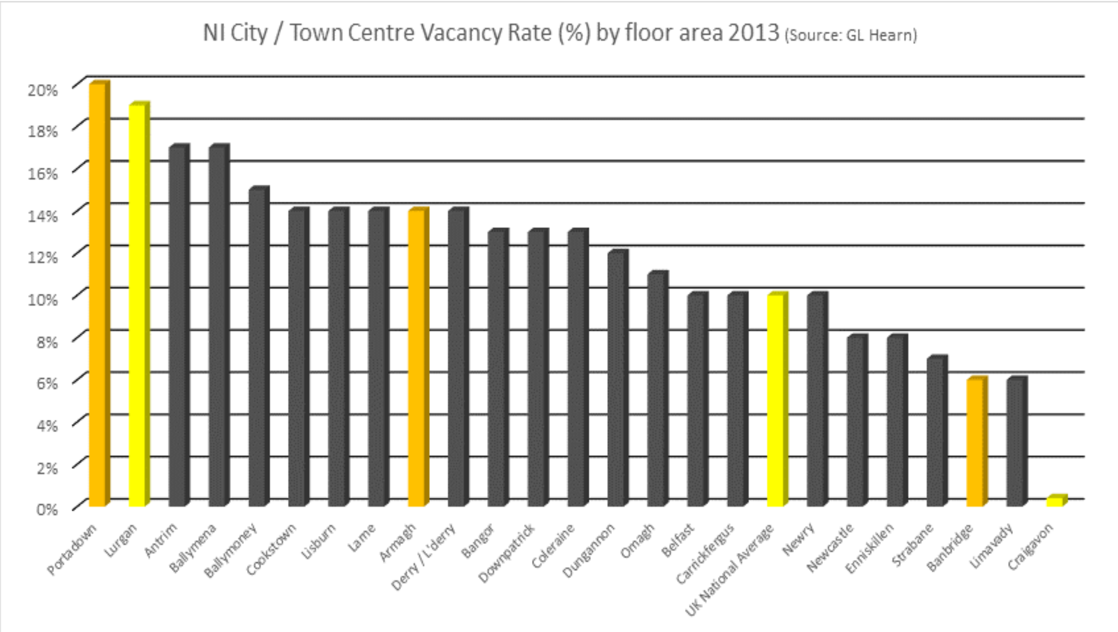


Figure 2

Further detail on the main findings of the town centre health checks for the Armagh, Banbridge and Craigavon Area is provided in Section 6.0 Town Centre Studies.

3.3 The report highlighted that out-of-centre retailing is focused outside larger town centres or on strategic routes. In terms of functions, the role of these retail parks is almost exclusively retail. In comparison to the rest of the UK, leisure uses such as cinemas and bowling alleys are not commonly found in these locations. The report displays that in the Armagh, Banbridge and Craigavon Area, there is only one notable out-of-centre retail parks – the Outlet in Banbridge.

3.4 There are also a number of town centre issues facing Northern Ireland towns which are summarised in Table 1 below. The weaknesses and threats identified by GL Hearn "indicate that it would be appropriate to have a stronger policy stance on protecting and enhancing town centres, encouraging private sector investment and development and making town centres the focus for not just retail but other significant footfall generating uses".

Table 1: Town Centre Issues

Strengths/Opportunities	Weaknesses/Threats
• Diversity of existing town centres • Strong local independent retail offer • Good quality physical environment • Town centre parking, particularly short stay 'on street' provision. • Employment uses within town centres • Good accessibility and public transport hubs.	• Vacancies and potential obsolesce of some floorspace • Low and falling retail rents • Amount and profile of out of centre retailing • Development pipeline • Limited private sector town centre development /investment • Heavy traffic flows and congestion leads to conflict with shoppers

3.5 The retail sector is constantly evolving and adapting in response to consumer and lifestyle trends and other market influences. Much of this change has been the growth in both personal income and disposable consumer spending, coupled with population growth. Such trends and influences have and will continue to transform traditional high street retailing and commercial leisure development. The economic downturn has had a negative effect on consumer spending. As a consequence of the recession, retail spending year on year for the next three to four years is expected to be low.

3.6 National trends in consumer expenditure show a growth in home shopping and electronic commerce. The home shopping sector includes a number of retailing channels including catalogue sales, direct retailing, TV shopping and internet shopping. An increasing number of 'high street' retailers are now offering online shopping. (DOE NI- GL Hearn Report, January 2014). However, the growth in online shopping habits does not mean the end of the high street. Whilst online sales are increasing so too is 'click and collect' where consumers order online but visit the store to collect their goods. This service can help ensure that town centres will attract people and remain viable.

3.7 Although there are far fewer retailers actively looking for stores in Northern Ireland than elsewhere in the UK, certain retailers are taking new stores. These include discount stores; the likes of Home Bargains and Poundworld. The food sector including restaurants and coffee shops are also showing growth (NI Commercial Property Report 2013- Lisney). This report also states there is a growing trend by national multiple retailers to achieve increasing economies of scale. This results in centralisation of services whereby larger stores serving an extensive catchment are replacing a number of smaller stores. These new forms of retailing are unlikely to be accommodated in existing town centres.

3.8 The GL Hearn Report concludes that many of Northern Irelands towns have remained reasonably vital and viable mainly because many towns retain a good mix of uses, in particular services in the heart of the centre; most have reasonable/good accessibility on the street and nearby surface parking; most visits involve a number of linked trips; many have a high level of independent and long standing family businesses; there is a degree of loyalty to the town centre as being the heart of the community and some towns are beginning to find niche markets or their own 'brand' identities – cultural, visitation, seaside, gateway to countryside, specialist food etc. However, town centres do need to offer an experience over and above the average functional shopping trip which might otherwise be carried out online or at an out-of-town retail park. The outcome of this is ensuring that town centres are more attractive and viable to all age groups, that they have a diversity of uses and are adaptable to predicted future retail trends.

4.0 Existing Area Plans

4.1 The Area Plans Armagh, Craigavon and Banbridge/Newry and Mourne are the statutory plans for these areas and provide the policy framework against which to assess development proposals. Armagh, Craigavon, Lurgan and Portadown also have their own non-statutory Town Centre Masterplans which provide the basis and justification for the Department for Social Development's decision making on the promotion, implementation and timing of urban regeneration initiatives in the respective town centres.

4.2 The existing Area Plans designate Town Centre boundaries and Primary Retail Cores (PRC) within Central Craigavon, Portadown, Lurgan and Banbridge. The Armagh Area plan designates a Central Area Limit for Armagh along with a commercial area. The central area limit equates to the Town Centre Boundary and the Commercial Area equates to the Primary Retail Core. However the operational policies for determining applications in these areas are contained in the prevailing regional Planning Policy Statement 5 Retailing and Town Centres which took precedent over existing Development Plans that had been adopted prior to June 1996. This will be replaced by the SPPS upon executive agreement. Where town centres are defined it was anticipated that commercial activity would concentrate within them. The vitality and viability of the town centres is retained by new shopping and office development. Within the Craigavon Area Plan and the Banbridge/Newry and Mourne Area Plan Development Opportunity Sites are also identified for the main towns and the local towns. These Sites are identified within the Plans as having special merit for a particular land use. The status of the Sites is illustrated in **Tables 2-4** below. Within a number of the towns the Plans also designate Areas of Townscape Character, Conservation Areas, Areas of Archaeological Potential and Local Landscape Areas. However these designations do not unduly limit the potential for retail development within the towns.

Armagh Area Plan 2004

4.3 Whilst the information contained in the adopted plan is well out of date it remains the statutory Plan for Armagh until a new LDP is developed and as such is still relevant. An objective within the Armagh Area Plan is 'to promote vibrant towns and villages by increasing their attractiveness as places to live, work, use and invest'. The Plan identifies that Armagh's commercial area (Appendix 3) continues to provide the best location for retail and office use due to its ready accessibility by a variety of modes of transport. For shopping purposes Armagh provides a relatively compact centre with a range of retail outlets. The main shopping and commercial streets include Upper English Street, Market Street, Scotch Street and Thomas Street and have a variety of shops, cafes, banks and services, the majority of which are independently owned. Since the adoption of the Plan two small shopping centres have been developed at the Mall and Ogle Street. Secondary Shopping streets at Barrack Street, Ogle Street, Dobbin Street, College Street and Lower English Street also contribute to the overall vitality and viability of the town centre. Non retail uses may be acceptable in these areas provided that they complement the retail function of the centre and the plan undertook to monitor the situation throughout the Plan period to ensure and imbalance between retail and non-retail uses did not arise.

4.4 The Plan also noted the contribution made by housing within and close to the Central Area such as Charlemont Gardens, Callan/Navan Street, Banbrook Hill, Victoria Street and Barrack Street and aimed to protect and retain existing housing while providing support and encouragement for new housing on derelict or backland sites and proposals to re-use upper floors of properties within the Central Area for residential uses. It is acknowledged that specific housing areas make a positive contribution to the attractiveness, security, vitality and viability of the town centre.

4.5 No Development Opportunity Sites were designated within the Armagh Area Plan 2004.

Craigavon Area Plan/Craigavon Town Centre Boundaries & Retail Designations 2010

4.6 The Craigavon Urban Area has three main shopping cores: Central Craigavon, Lurgan and Portadown (Appendices 5,6 & 7). Central Craigavon has benefitted in recent years from improvements and extensions to Rushmere Shopping Centre while Portadown has seen the development of the Meadows Shopping

Centre and High Street Mall. Lurgan Town centre is characterised by its attractive townscape, now a Conservation Area, and a predominance of local independent traders. The Plan Strategy is to facilitate a level of commercial growth in the three town centres which reflects their individual status as towns and to ensure the availability of adequate opportunities for regeneration and the mix of uses appropriate to town centres, such as offices, leisure and civic uses and promote viable and vital town centres.

4.7 Town Centre Boundaries and Primary Retail Cores have been designated for each of the three main centres. This is to ensure the continuance of a compact, lively and attractive and to offer protection to retail uses under regional policy contained with PPS5 (to be replaced by SPPS). Primary retail frontages have also been designated within Lurgan and Portadown and protection for the retention of retail uses in these areas is provided by specific policy. In addition, Development Opportunity sites have been identified in Lurgan and Portadown (Appendix 8). The status of these sites is identified in Tables 2-4 below and is discussed in Section 6.0 of this Paper

Table 2: Lurgan Development Opportunity Sites

Plan Ref	Area Plan Proposal	Current Status	Planning History
L1	Mixed Use, retail, housing and/or office	Not developed	N/2008/0013/F – Erection of mixed use development (81 residential and 18 retail business units) APPROVED 2/10/2009 N/2004/0122/F – Development class 1 retail units APPROVED 29/7/2004
L2	Mixed Use, retail, housing, and/or leisure	Completed	N/2003/0117/F – Proposed housing Development (townhouses and apartments). APPROVED 30/9/2004
L3	Mixed Use, retail, housing, and/or leisure	Completed	N/2010/0756/F – single storey extension to Lidl store. APPROVED 13/5/2011 N/2005/0886/F – Erection of 8 bed residential care home and 4 flats. APPROVED 4/11/2005
L4	Mixed Use, housing, and/or community	Partially Developed (approx. 20%)	N/2003/0733/F – Housing Development. APPROVED 19/1/2001

(For DOS locations see Map in Appendix 8)

Table 3: Portadown Development Opportunity Sites

Plan Ref	Area Plan Proposal	Current Status	Planning History
P1	Mixed use or individual uses of retailing/office/leisure/housing	Partially developed	N/2010/0336/RM – Development of Class A1 Food Store (Asda)
P2	Mixed use or individual uses of retailing/office/leisure/housing	Not developed	No relevant planning history
P3	Mixed use or individual uses of retailing/office/leisure/housing/cultural	Not Developed	N/1998/0458 – site for retail food development. REFUSED 28/5/2008
P4	Mixed use or individual uses of retailing/office/leisure/housing/community	Not Developed	No relevant planning history
P5	Mixed use or individual uses of retailing/office /housing	Not Developed	No relevant planning history

(For DOS locations see Map in Appendix 8)

Banbridge/Newry and Mourne Area Plan 2015(BNMAP)

4.8 Banbridge town centre has a multi-functional role being a main focus for Commercial activity along with educational, health, administrative, community and recreational facilities. The main shopping area is along Newry Street, Bridge Street, Scarva Street and Rathfriland Street. The town has a broad range of retailers providing both comparison and convenience goods. Both a town centre boundary and primary retail core have been designated in Banbridge to ensure the continuance of a compact and attractive shopping environment, offering both choice and convenience. As with the other Plans development proposals will be processed in accordance with prevailing regional planning policy and relevant policies within the Plan. The Primary Retail Core centres around Newry Street, Bridge Street, Scarva Street, Rathfriland Street, Linenhall Street and Old Kenlis Street

4.9 Within Banbridge town centre 12 Development Opportunity Sites are identified (Appendix 4). Their current status is displayed in table 4;

Table 4: Banbridge Opportunity Sites

Plan Ref	Area Plan Proposal	Current Status	Planning History
BE42	Mixed use or individual uses of retailing/office/leisure/housing/community	Not developed	No relevant Planning History
BE43	Mixed use or individual uses of retailing/office/leisure/housing/community	Not developed	Q/2006/0859/F – Erection of 2 storey commercial development and car parking. APPROVED 23/10/2008.
BE44	Mixed use or individual uses of retailing/office/leisure/housing/community	Not developed	No relevant Planning History
BE45	Mixed use or individual uses of retailing/office/leisure/housing/community	Not developed	No relevant Planning History
BE46	Mixed use or individual uses of retailing/office/leisure/housing/community	Not developed	Q/2006/1094 – site for new multi-storey car park. APPROVED 23/1/2008.
BE47	Mixed use or individual uses of retailing/office/leisure/housing/community	Not developed	No relevant Planning History
BE48	Mixed use or individual uses of retailing/office/leisure/housing/community	Not developed	No relevant Planning History
BE49	Mixed use or individual uses of retailing/office/leisure/housing/community		Q/2010/0520/F – Retention of residential units. APPROVED 22/02/2011 Q/2007/0348/F – Erection of apartment development 25 units. APPROVED 23/3/2009 Q/2005/0514/F – Erection of 6 apartments and 2 Townhouses as Q/2001/0208/F. APPROVED 25/5/2006
BE50	Mixed use or individual uses of retailing/office/leisure/housing/community	Not developed	No relevant Planning History
BE51	Mixed use or individual uses of retailing/office/leisure/housing/community	Not developed	No relevant Planning History
BE52	Mixed use or individual uses of retailing/office/leisure/housing/community	Not developed	No relevant Planning History
BE53	Mixed use or individual uses of retailing/office/leisure/housing/community	Not developed	No relevant Planning History

(For DOS locations see Map in Appendix 4)

5.0 Town Centre Masterplans and Development Strategies

5.1 Whilst the Area Plans provide the statutory planning framework for land use proposals, Town Centre Masterplans, which were commissioned by the Department for Social Development (DSD) in partnership with the District Councils, are non-statutory documents which focus on regeneration initiatives and public realm improvements in our town centres. Town Centre Masterplans set out a vision for a particular Town Centre and identify key proposals for realising that vision over a set period of time. Armagh has a City centre Masterplan in place, whilst Regeneration strategies for Craigavon, Portadown and Lurgan are contained within the Craigavon Integrated Development Framework. The Banbridge Development Strategy 2009 – 2015 sets out the regeneration objectives for Banbridge.

Armagh City Centre Masterplan

5.2 The Armagh City centre Masterplan (May 2009) sets out the blueprint for the future growth and investment in the city over the next 10-15 years and is informed by a detailed information gathering process and analysis. The information gathered for this study was wide ranging and identified the issues and opportunities and the analysis forms the foundation upon which the Masterplan proposals are built. Armagh is a city of unparalleled significance in Northern Ireland. Its history and heritage form a strong identity and character which is one of the City's greatest assets and therefore must be conserved. The compact city centre has a historic urban form and a wealth of listed buildings, making it a special place to live, work and visit. Armagh faces challenges connected with the economic climate but also in balancing the needs of a modern settlement within an historic context. Its location at the heart of south-central Northern Ireland and close to the border should be viewed as an opportunity although congestion and poor traffic circulation has a detrimental effect on the functioning of the city centre and its environmental quality. The analysis identified that in comparison with the neighbouring towns of Craigavon, Portadown, and Newry, Armagh has a relatively limited retail offering and it is likely to need a greater critical mass of shops to attract and retain customers for a longer period of time. The character of the city centre lends itself to niche retailers which should be encouraged, and any large supermarkets should be carefully planned so as not to detract from Armagh's special character. The centre has a number of development sites which have the potential to add to Armagh's character and economic growth. Such growth should seek to nurture its mixed use character so that retail units are complemented by a range of other uses including offices, residential and leisure facilities. The centre's recent transformation of public realm should be expanded to improve the gateways into the city.

5.3 The Masterplan sets out 5 regeneration objectives to enable Armagh City Centre to achieve its vision over the next 10-15 years and are highlighted below. This vision is that Armagh's well-maintained historic buildings, streets and spaces will provide the backdrop for a forward thinking City, with excellent amenities for its residents, provision for retail, business and enterprise and a welcoming environment for those who come to visit:

1. Enhance the quality of life for Armagh's residents.
2. Maintain and Enhance Armagh's historic character and identity
3. Develop a sustainable economy based on existing strengths.
4. Develop Armagh as a leading tourism destination
5. Develop a sustainable transportation network.

5.4 The Masterplan also indentifies a range of projects and Development Sites – opportunities for change (including the Gaol, Ogle Street etc.) which will help achieve the objectives striving to ensure that the city centre is a safe, lively and attractive place to live, work and visit.

Craigavon Integrated Development Framework (CIDF)

5.5 The Craigavon Integrated Development Framework was published in 2010. Its purpose is to guide how the 3 town centres of Central Craigavon, Portadown and Lurgan will develop and thrive over the next 20 years and sets out a strategy for regeneration that will be pursued by the Department for Social Development and Craigavon Borough Council. In formulating the CIDF a Retail Capacity Survey was not undertaken. The CIDF focuses on achieving an integrated vision for the "3C"- the 3 centres as the complete package which is that in 2020 the 3 centres of Portadown, Lurgan and Central Craigavon will be a focus for investment fitting for NI's fourth largest urban area. It will have 3 complementary and successful centres all with a unique offer, each having a distinct role and identity and each benefiting from a greatly enhanced environment and range of facilities. The CIDF aims to project this vision through scores of individual actions, projects and development schemes that will strengthen each individual centre and contribute to the overall regeneration of Craigavon.

5.6 Recommendations have been made for each of the 3 Centres:

Central Craigavon:

- Development of town centre uses, with a focus on larger units and facilities that would not find a natural home in the traditional town centres
- Marketing sites in public ownership for daytime leisure and hotel use
- New transport links
- Improvements to the public transport network
- Improved pedestrian links
- Promotion and marketing of the centre as a place to invest.

Development sites were identified at lands situated between Central Way and Highfields, lands to the north and south of the Civic centre and lands to the west of Lakeview Road abutting Rushmere.

Lurgan:

- Redevelopment of key sites in Castle lane
- Physical improvements to the public realm, particularly along Market Street/High Street and towards Brownlow House and the park.
- Developing loose zones for 'shopping' in the middle of High Street/Market Street, ' relaxing' at the NW end and 'living and working' at the SE end.
- Refurbishment of derelict buildings for housing and community uses, living over the shop.
- Promotion of tourism, such as investigating the potential development of Brownlow house.

Other development sites were identified at lands situated between William Street and ulster Street, The car park off Wesley Place/William Street, Johnston's Row car park and backlands, east end of High Street facing First Lurgan Presbyterian Church and lands to the SE end of Millenium Way.

Portadown:

- Redevelopment of key sites including a major riverside mixed use scheme, including housing, offices, hospitality, hotel and retail and service sector expansion on existing car parks.
- Clustering of 'evening economy' uses and cultural facilities in existing building close to the church as well as by the river.
- Physical improvements to the public realm.
- Developing a riverside green walkway.
- Vastly improving links across the Northway/railway.
- Public transport improvements including redevelopment of the station (already completed)
- Promotion of the watersports centre.
- Promotion of empty offices to public sector
- Car parking routes and signage project

Other development sites were identified at lands off Castle Street, the car park to the rear of Magowan West Shopping Centre, the car park to the rear of High Street Mall, Shillington Street car park, Shillington Street council depot, lands abutting Bridge Street/Bridge Street south, car parks to the west of meadow lane, Ulster Carpets site and the RA Irwin & Co factory site.

5.7 The CIDF also contains an overarching strategy for transport and access and identifies various issues which should be addressed to create more sustainable transport patterns, including using public transport to connect the 3 centres for everyone.

5.8 Close partnership working is required between public bodies and the private sector to show that guided by CIDF the town centres can reach their full potential. Craigavon Integrated Regeneration partnership consists of elected members and officials from public and private bodies to assist in the implementation of the CIDF.

Banbridge Development Strategy 2009-2015

5.9 The Banbridge Development Strategy was published in July 2009 identifies the key regeneration concepts, a coherent vision for the town and includes specific regeneration proposals for economic development, potential development sites, groups of buildings and environmental improvements.

5.10 An audit of the town centre was carried out as part of the Strategy to assess the key assets, resources and opportunities available to drive forward regeneration and build on the qualities which make Banbridge unique and an analysis was carried out of the strengths and weaknesses of the spatial structure of the town. The overall picture that emerged is of a relatively balanced and robust town with great potential to be more sustainable. Although a retail capacity study was not carried out it the strategy highlights that the retail sector in the town centre faces competitive pressure from other improving town centres like Newry and Lisburn and the internet. Independent retailers, who are an important part of the Banbridge distinctive retail offer have to continue to innovate and invest to remain competitive.

5.11 The Banbridge Development Strategy sets out the vision for Banbridge's future. It states that Banbridge is a growing, thriving, well connected and managed market town with a robust economy that retains its individuality and because of the high quality of life, good leisure facilities, inclusive sense of pride, the positive committed business community and strong local culture in Banbridge people want to live, work and visit now and in the future. To achieve this vision and deliver the spatial development strategy, a series of 4 key themes have been established to repond to key challenges.

- Place Making and Mixed use: Investing in Town Centre
- More Competitive Businesses
- Effective Marketing
- Leadership and Resources: Managing implementation

The development of opportunity sites will be a key driver to developing the multiple retail offer within the Town Centre. Of the 12 development opportunity sites identified in the Banbridge/ Newry and Mourne Area Plan 2015, four sites have been identified as the priority development sites in the Strategy. The priority sites have been identified on the basis that they have the greatest potential impact to improve the functioning and image of Banbridge and can fulfil the aims set out in the vision and wider strategy. These sites are located at Bridge Street/Gospel Lane, Gospel Lane, Townsend Street and Downshire Place/Scarva Street.

5.12 Another key theme is the 'Greening of the town centre and connections'. This will include environmental improvements to foot paths, cycle routes and links to the river-side with the aim of strengthening strategic connections in the town centre in a sustainable manner.

5.13 The Development Strategy covers the period from 2009 – 2015 and is currently being developed into a Masterplan.

6.0 Town Centre Studies

6.1 In preparing a plan, an assessment of the health of town centres and a retail capacity study should be carried out. A town centre health check is essentially a qualitative assessment in that it looks at the attractiveness, accessibility and amenity of the town centre. Although no single indicator can effectively measure the health of a town centre, the use of a series of them can provide a view of performance and offer a framework for assessing vitality and viability. Vitality is a measure of how busy a centre is and viability is a measure of its capacity to attract ongoing investment for maintenance, improvement and adaption to changing needs.

6.2 A retail capacity study is a quantitative assessment of the need for additional retail floorspace over the plan period. This will include catchment area definition, calculating total expenditure and turnover of convenience and comparison goods, and projection of future needs.

6.3 As a health check or retail capacity study has not yet been carried out to inform this section of the paper, we have instead relied on the findings from a review of existing town centres in Northern Ireland contained in the 2014 GL Hearn report and information contained within Healthchecks prepared by Place Solutions (on behalf of Armagh City and District Council and Craigavon Borough Council to inform the review of the Armagh Masterplan and CIDF) in February 2015. Unfortunately, these Place Solutions healthchecks did not include Banbridge. We have also considered results from the Planning land use surveys carried out in 2011 and April 2015.

6.4 Vacancy rates are considered as an important measure of how healthy a town centre is. According to the Northern Ireland Retail Consortium (2015), town centre vacancy rates have fallen in NI from 20.0% in 2011 to 16.30% in January 2015. Despite this welcome fall in the NI vacancy rates, this still remain significantly higher than the UK average (10.4%).

(i) Armagh

6.5 The GL Hearn report shows that in 2013 the retail floorspace within the city centre (commercial area) is estimated to be 12,500 sqm gross consisting of convenience, comparison, service uses and other uses. Armagh has a range and choice of shopping facilities with a mix of predominately independent retailers. The main food stores located within the heart of the city centre are Sainsburys and Emersons. There is are edge of centre stores at Ogle Street (Eurospar) and Irish Street (McInerneys). The Shambles Variety Market off Dawson Street provides a fresh food offer twice weekly and there is also a local market three times weekly at Market Square selling fish, flowers and local produce. The Planning town centre survey (2015) reveals that the proportion of convenience goods units in the city centre is only 6.02 % compared to the ABC average of 9.2%. A new large foodstore was constructed at Lonsdale Road on the former Fane Valley site, part of which is within the commercial area (primary retail core). However it appears that it may not now open as a foodstore and alternative uses are being considered.

6.6 There is a good mix of independent and small national retailers within Armagh. The comparison goods offer is predominantly provided by local traders in prominent locations within the centre including TA Hawthorne in Scotch Street and Decorabrite in Market Square. The 2015 Planning Town centre use survey reveals that comparison good retailing comprised 26.62% of the town centre's overall units and in line with the ABC average (26.07%).

6.7 Other town centre uses include retail service, leisure and offices. There is a representation from most of the major banks and building societies. There is also a successful theatre (the Market Place), a cinema, tourist offer and a variety of restaurants and bars. The 2015 Planning survey reveals that the percentage of retail service units in Armagh (30.32%) was above the ABC average (28.68%).

6.8 Armagh also has a shopping offer at the Spires Retail Park beyond the primary retail core (commercial area) off the Moy Road. Tenants include Argos, Heatons/Sportsdirect, M&S Simply Food, Lidl, Peacocks Iceland, Halfords and the Poundworld.

6.9 The DoE Land Use Survey (2015) informs us that there are 88 vacant units within Armagh town centre (20.37%). This compares to 65 vacant units in 2011 (17.29%). The principal streets with the highest level of vacancy are Upper English Street (particularly around the junction of Upper English Street and Lower English Street) and Ogle Street. Unit Vacancy rate is lowest in Scotch Street (11%) and Thomas street (14.5%).

6.10 Another key indicator of town centre vitality is pedestrian footfall. Pedestrian flows are highest along Market Street, Upper English Street and McCrums Court and the upper section of Scotch Street. Place Solutions (February 2015) has indicated that footfall in Armagh is approximately 26,300 per week and evening footfall now accounts for 18% of the total weekly footfall. Armagh has 1047 parking spaces comprising 338 free and 709 pay spaces. Public transport consists of a bus station at Lonsdale Road the focus for local services and Ulsterbus services to Belfast, Craigavon, Monaghan and Dungannon along with a number of easily accessible bus stops on the Mall.

6.11 The quality of the town centre is of great importance and can increase business confidence, foster public pride and enhance local identity. A Conservation Area extends over and beyond the commercial area and includes many listed buildings. The Georgian architecture adds unique sense of history and cultural integrity to the centre and the main shopping frontages are in good condition. Armaghs main shopping streets are no longer pedestrianised. There is an excellent public space provision including the Market Square, The Mall and the Shambles Market which has a development strategy in place. The public realm is generally good and the main areas have been refurbished to include lighting, seating and hard landscaping. The City Centre is generally clean and well kept with low levels of graffiti and litter.

(ii) Banbridge

6.12 The GL Hearn report shows that in 2013 the retail floorspace within the town centre is estimated to be 16,000 sqm gross consisting of convenience, comparison, service uses and other uses. The town centre is principally based around Newry Street/Bridge Street and Scarva Street/Rathfriland Street which form a commercial thoroughfare. The town centre is anchored by a Supervalu supermarket on Newry Street and has a good range of local convenience retailers. There is an edge-of-centre Lidl located at the western end of the town which has a pedestrian link to Newry Street. The Planning town centre survey (April 2015) reveals that convenience units comprise 10.24% of all town centre uses (ABC city/town centre average of 9.2%).

6.13 Banbridge town centre has a limited number of national multiple comparison goods retailers but is bolstered by a number of large independent retailers. These include Houstons Department store, SD Kells and Donaghys along with a selection of other independent stores. The Planning town centre survey (April 2015) reveals that convenience units comprise 25.6% of all town centre uses (ABC city/town centre average of 26.07%).

6.14 The Planning town centre survey (April 2015) reveals that retail service units comprise 29.69% of all town centre uses (ABC town centre average of 28.68%). Within this sector there is an extensive range of independent hair salons, barbers and beauticians along with a number of cafes and restaurants. Banbridge also has a significant number of pubs and nightlife venues such as the Belmont Hotel, Banville Hotel and the Coach Nightclub.

6.15 The Planning Land Use Survey (2015) informs us that there are 42 vacant units within Banbridge town centre which equates to a unit vacancy rate of 14.33%. This compares to only 9 vacant units in 2011 (3.36%). The streets with the highest level of vacancy are Bridge Street and Newry Street with vacancy levels on Newry Street increasing by 13.28% since 2011. 2015 Survey results indicate that vacancy rates are also very high at the Outlet 36.6% vacant.

6.16 The Town Centre extends from Church Street/ Church Place east of the River Bann to the key axis of Bridge Street, The Cut and Newry Street with their backlands south of the river. The primary retail core includes the area either side of Newry / Bridge Street with an area of primary retail frontage along Newry Street from the Cut to Linenhall Street. Pedestrian flows are highest along the main shopping streets of Newry Street, Bridge Street, Rathfriland Street and Scarva Street. The town centre is dominated by the private car with on street parking widely available. Banbridge also has 700 parking spaces comprising 230 free and 470 fee paying. Public transport consists of a bus station at Newry Street which offers local services and Goldline services to Belfast / Dublin etc.

6.17 The quality of the town centre is of also of great importance and can increase business confidence, foster public pride and enhance local identity. Through the Banbridge/Newry & Mourne Area Plan 2015, an Area of Townscape Character (ATC) has been designated within Banbridge Town Centre (Ref: BE62 ATC Town Centre). This ATC acknowledges the twisting townscape around Church Square & Dromore Street to the northwest of the River Bann along with the grid-like pattern to the southwest centred on the Bridge/Newry Street axis. The Cut along this axis forms a very distinctive feature. There are many listed buildings such as the Downshire Arms Hotel at Newry Street and the recently refurbished Old Townhall at Scarva Street whilst, distinctive buildings such as the listed Holy Trinity Church (CoI), former Methodist Church and original police barracks grouped around the Crozier Monument give Church Square a distinctive sense of place. The town centre generally presents a pleasant environment with no notable graffiti or litter but areas of backlands would benefit from environmental improvements. The Bann River dissects the town centre and is bounded by Solitude Park which has recently been upgraded. To help alleviate traffic congestion, a new one-way road proposal has been built to link Bridge Street and the Rathfriland Road. The Old Townhall on Scarva Street has also recently been restored for use as a new tourist information office and community space for exhibitions, conferences and meetings.

6.18 The priority projects identified in the Banbridge Development Strategy 2009-2015 for the development of the opportunity sites have still to be achieved. Planning permission was granted for a commercial development and car park (Q/2006/0859/F) at the site at Gospel Lane. This permission has, however, expired. The 4 priority sites are all undeveloped. Only one of the development opportunity sites designated in the BNMAP 2015 Linenhall Street has been partially developed. All the others remain undeveloped. An important gateway site is currently under construction at the junction of Newry Street /Kenlis Street for a café. No retail capacity study has been done for Banbridge town centre.

6.19 Outside of the town centre there is a Tesco store and petrol filling station on Castlewellan Road and a cinema complex off Downshire Place. The Outlet Retail Park at Cascum Road has developed as a factory outlet centre and contains 82 units. Of these 82 units, there are 46 factory outlet units operating, 30 vacant units (37% vacancy rate), four cafes / restaurants, one childs play centre (W5) and the recently opened large Tesco Extra Supermarket. The Outlet has also a planning approval for an eight screen cinema, childrens play area & cafe, two restaurants and a garden centre. The outlet may be considered as the biggest threat to the vitality of Banbridge Town Centre or alternatively a centre which will complement the offer and attractiveness of Banbridge as a whole.

(iii) Craigavon

6.20 The GL Hearn report states that in 2013, the retail floorspace in Craigavon was approximately 44,000 sqm. Rushmere Shopping Centre and its associated retail park contains the entire retail offer in Central Craigavon's primary retail core. The 2,800 sqm Sainsburys provides the main convenience shopping facility within Rushmere. The town centre extends beyond the primary retail core to the Council Civic Centre building beside the balancing lakes and to the area west of Central Way. This area contains Craigavon Courthouse, Marlborough House office building & the Marlborough Retail Park containing a Tesco (Extra) Superstore & petrol filling station, B&Q DIY Superstore, a Halfords car and bike store and Trust Ford Car Sales Depot.

6.21 Craigavon Town Centre including Rushmere Shopping Centre and Marlborough Retail Park is unique in Northern Ireland in terms of the dominance of the comparison goods offer which amounted to over 60% of units in 2015 (ABC town centre average 26%).The comparison offer is dominated by national multiples with Debenhams providing the Anchor and has a notably strong fashion offer. There are further clothing outlets located in the adjacent Rushmere Retail Park alongside bulky goods occupiers. It is notable that the more recent lettings in Rushmere have focused on the discount store sector.

6.22 Unlike other centres in Northern Ireland, the service offer is focused on food and beverages and has no hairdressers, banks, building societies, bookmakers, or financial and professional services. The town centre includes eight café /restaurants with three in-store facilities. Overall the service uses in the centre account for a much lower proportion by unit than typical in other healthy town centres in Northern Ireland at only 11% (ABC town centre average 27%).

6.23 The very low level of unit vacancy with Craigavon Town Centre (2015:5.63% & 2011:4.48%) reflects the health of the centre with no long term vacant units or obvious concentrations of vacancy. Although Craigavon Town Centre has a very low percentage of office units (5.63% compared to ABC average of 15.96%), it should be noted that these office units contain a number of large buildings such as Marlborough House as opposed to single traditional town centre office uses. Therefore using unit numbers instead of floorspace can skew the figures in certain instances.

6.24 The centre has approximately 1800 free car parking spaces and is served by a number of bus services (including the Belfast to Portadown & local bus services) with a dedicated bus area on the western side of Rushmere. The average weekly footfall for the centre is estimated at 100,000 people which is more than the combined total for Portadown and Lurgan.

6.25 The town centre benefits from a high quality built environment which is well maintained, safe, accessible and clean. It is located adjacent to the Craigavon City Park and Lakes and is well linked to the surrounding residential neighbourhoods by the dedicated 'black path' network catering for pedestrians and cyclists. The centre contains a covered mall (Rushmere Shopping Centre) which has changing areas/toilets, a post office, cafes and seating throughout alongside the retail offer. It is a well-lit centre protected from the elements with centre security and an information desk.

6.26 Adjacent to the Craigavon Town Centre boundary at Highfield Road is a newly opened cinema and a site adjacent to the Civic Centre beside the south lake has been chosen as the location for the proposed new leisure centre complex. There are no development opportunity sites zoned within Craigavon Town Centre.

(iv) Lurgan

6.27 The GL Hearn report states that in 2013 there is a good range of independent retailers in Lurgan town centre and the retail floorspace offer in Lurgan was approximately 17,000 sqm. The town centre boundary is principally either side of William Street, Market Street and High Street as far east as Charles Street and west as Malcolm Road. It contains significant backlands north of Millennium Way and south of Brownlow House / Lurgan Park. The primary retail core is west of Church Place and east of lower High Street with the primary retail frontage along Market Street between Church Place and Windsor Avenue.

6.28 The large Tescos supermarket off Carnegie Street / Millennium Way provides the main convenience shopping facility within the town along with LIDL and Iceland Stores at Castle Lane. There are also small groupings of local convenience shops (bakery, butcher, fruit & veg, newsagents etc) at a number of locations on the edge of the centre at North Street, Edward Street and Upper High Street. The DoE Land Use Survey undertaken in April 2015 reveals that in composition terms, convenience outlets comprised over 13% of all units (ABC town centre average 9.2%).

6.29 Heatons Department store is the main comparison anchor in the town centre, augmented by SD Kells and Houstons and a number of other independent clothing and footwear retailers. The DoE Land Use Survey (April 2015) revealed that comparison outlets comprised only 17.32%, the lowest of any of the five ABC Town Centres and significantly below the ABC average of 26.07%. This would suggest that Lurgan is under performing in relation to comparison goods provision within its catchment area. This could be further investigated by an ABC town centres retail capacity study and consideration of the various market shares versus the potential catchment spend.

6.30 The retail service sector is well represented with a range of banks, building societies, financial and legal services, health and beauty outlets making up 33.52% of total units which is the highest of any of the ABC town centres and above the ABC town centre average (28.68%). There is also a wide selection of pubs, takeaways and cafes throughout and adjacent to the centre although the restaurant offer is more limited. William Street has tended to be a focus for nightlife, pubs and takeaways focused on the Ashburn Hotel & 'Burn Niteclub'.

6.31 The Planning Town Centre survey of unit vacancy within Lurgan Town Centre shows that vacancy rate has fallen marginally since 2011 (2015:17.32% & 2011:17.49%).The 2015 figure is now below the ABC town centre average vacancy level. There are small visible clusters of vacant units along the main thoroughfare of High Street and Market Street. North Street and Union Street are the principal streets presenting the lowest levels of vacancy in 2015 (5.56% & 11.76%). In 2015, the percentage of units in use for comparison and convenience goods has fallen while there has been an increase in the proportion of retail services.

6.32 Lurgan town centre has almost 1100 car parking spaces, of which over 900 are free and 45 for disabled drivers. This does not include the short-stay spaces located on street along the main streets. Lurgan is served by a number of bus services (including the Belfast to Portadown & local bus services) with the main bus stop on Market Street. Lurgan Railway Station on William Street is also within 600m of Church Place and is along the Belfast to Dublin line. The average weekly footfall for Lurgan is estimated at 31,800 people (Source: Springboard Milestone).

6.33 The town centre is part of Lurgan Conservation Area with notable streetscape elements at Church Place, Market Street and High Street. There are numerous listed buildings within Lurgan with notable listed buildings include Christ Church CoI at Church Place, the Carnegie Inn at Market Street and the Mechanics Institute at High Street. Other important listed buildings include the late 19th century buildings at Church Place (nos 20-23) and High Street (nos 80-90). Lurgan benefits from a high quality built environment which was the subject of a recently completed DSD Environmental Improvement Scheme. This has introduced tree planting, seating, hard landscaping and a central island which is used as a venue for a small weekly market. The centre is located adjacent to Brownlow House/Lurgan Park and lake with its excellent recreation offer and play area / paths. The listed Brownlow House has been developed as a venue for weddings / concerts and as a café open to the public.

6.34 Four development opportunity sites have been designated within Lurgan Town Centre in the Craigavon Area Plan 2010. Designation L1: Castle Lane has not been developed but has been the subject of various planning approvals (all lapsed) for retail, residential and business units. Designation L2: Castle Lane has been completed as townhouses (Castle Lane Mews). Designation L3: Castle Lane has been completed as LIDL store and Care Home / flats. Designation L4: Johnston's Row is partially developed for housing (Rutherford Park).

(v) Portadown

6.35 The GL Hearn report shows that in 2013 the retail floorspace within the town centre is estimated to be 28,000 sqm gross consisting of convenience, comparison, service uses and other uses. The main shopping streets of Market Street and High Street are augmented by Magowan West Shopping centre, High Street Mall and the Meadows. The 2015 Planning town centre survey of Portadown Town Centre shows that convenience shopping outlets comprised 7.58% of town centre units, below the ABC average of 9.2%. The main convenience offer in Portadown Town Centre is at the Tescos in the Meadows Shopping Mall, with a Dunnes Store in High Street Mall and an Iceland store at the rear of High Street. There are also a range of independent convenience retailers throughout the town including butchers, bakers, fruit & vegetable shops and newsagents. Beyond the Town Centre boundary, an ASDA Food Superstore has opened at Bridge Street and there is also the large Eurospar on the Brownstown Road and the LIDL on the Armagh Road. The Portadown Central Market operates twice weekly and also provides a range of convenience goods, fish and flowers.

6.36 There is a good variety of clothing and footwear stores throughout the centre including multiples and independent boutiques. The number of charity shops is notable within the centre, particularly along High Street and Market Street. In composition terms, the Planning town centre survey results reveal that comparison outlets comprise 27.25% of units in 2015, a rise of 3.46% since 2011 and above the 2015 ABC average of 26.07% comparison units.

6.37 There is an extensive range of retail service uses with all of the main banks/building societies represented and a good selection of hairdressers and beauty salons. Banks and Financial Institutions tend to be located along the High Street / Market Street axis. Although there are a number of restaurants, the number of pubs, cafes and takeaways are more prominent. The Central Market Building was converted into arts and crafts/gallery space approximately 15 years ago. Other leisure uses in the centre are minimal. The Planning town centre survey results reveal that retail service units comprise 25.61% of units in 2015, a fall of 0.7% since 2011 and below the 2015 ABC average of 28.68% retail service units.

6.38 The main shopping centre, High Street Mall is accessed off High Street and is anchored by Dunnes Stores with a range of smaller units including the Post Office. Another shopping centre is The Meadows located on an edge of centre site and anchored by Tescos. Both centres, are experiencing high levels of vacancy particularly the Meadows which only has 5 occupied units of 29. Recent survey work shows that vacancy rates by unit in the centres are 27.3% and 75.9% respectively.

6.39 The DoE Land Use Survey (2015) informs us that there are 109 vacant units within Portadown town centre. This compares to 117 vacant units in 2011. The overall vacancy rate for Portadown is 22.63% which is skewed by the extremely high levels of vacancy in the Meadows. The streets with the highest level of vacancy are in secondary shopping streets with Bridge Street having the highest level at 29%. Vacancy rates in the main shopping streets are much lower with High Street having 14.29% of units vacant and Market Street 11.54%.

6.40 Pedestrian flows are highest along the main shopping streets Market Street and High Street. Pedestrian Counters ae in place and have indicated an average weekly footfall of 48,000. The town centre is dominated by the private car with on street and off street parking widely available however, parking charges appear to be a sensitive issue. Portadown also has a total of 1389 parking spaces comprising 656 free and 733 fee paying. Public transport consists of a train station within easy walking distance of the town centre. There are half hourly services to Newry, Belfast and Bangor and a two hourly enterprise service to Dublin. There is also a regular bus service with the main stop at High Street and a service operating from the railway station.

6.41 The quality of the town centre environment is generally good. The main shopping streets are non-pedestrianised. There is good quality public space provision and a modern functional public realm. The main areas have been refurbished. Portadown revitalisation projects post public realm works are nearing completion and include restoration of shop fronts, a new planting scheme, public art and the installation of free public WiFi. Portadown has no distinct heritage or architectural theme with modern and traditional frontages existing side by side. The frontages in the main shopping area are generally in good condition. The old Portadown Central Market has been converted to include a restaurant (Zios), a gallery and tourist information centre, a market space and a number of retail/office units.

6.42 Of the six development opportunity sites designated in the Craigavon area Plan 2010 only one has been developed (ASDA). There is an extant planning approval for a mixed use development comprising 36 residential units and retail/commercial buildings (N/2009/0729/F). No retail capacity study has been done for Portadown town centre.

6.43 Planning town centre surveys were conducted in 2015 and 2011 (See Table 5 & figure 3 below) which relate to the composition of the town centre units and the percentage of units vacant. This study reveals that the 2015 average vacancy rate for ABC is 18.57%, slightly higher than the Northern Ireland average and an increase of 2.38% from 2011. There has been a marginal decrease in vacancy rates in Lurgan and Portadown over the same period and a marked increase in Banbridge from 3.36% in 2011 to 14.33% in 2015. The percentage of vacant units within Armagh City Centre has also risen from 17.29% in 2011 to 20.37% in 2015. Craigavon Town Centre is unique in that it continues to experience extremely low levels of vacancy (2015:5.63%) Of the ABC city / town centres, Portadown has the highest levels of vacancy and Craigavon the lowest.

NI & ABC City / Town Centre Vacancy Rates 2011 & 2015

City / Town Centre	NI**	ABC (Average)	Armagh	Banbridge	Craigavon	Lurgan	Portadown
2011 (%)	20.00	16.19	17.29	3.36	4.48	17.49	22.34
2015 (%)	16.30	18.57	20.37	14.33	5.63	17.32	22.63

Source: Planning Surveys 2011 & 2015

Table 5

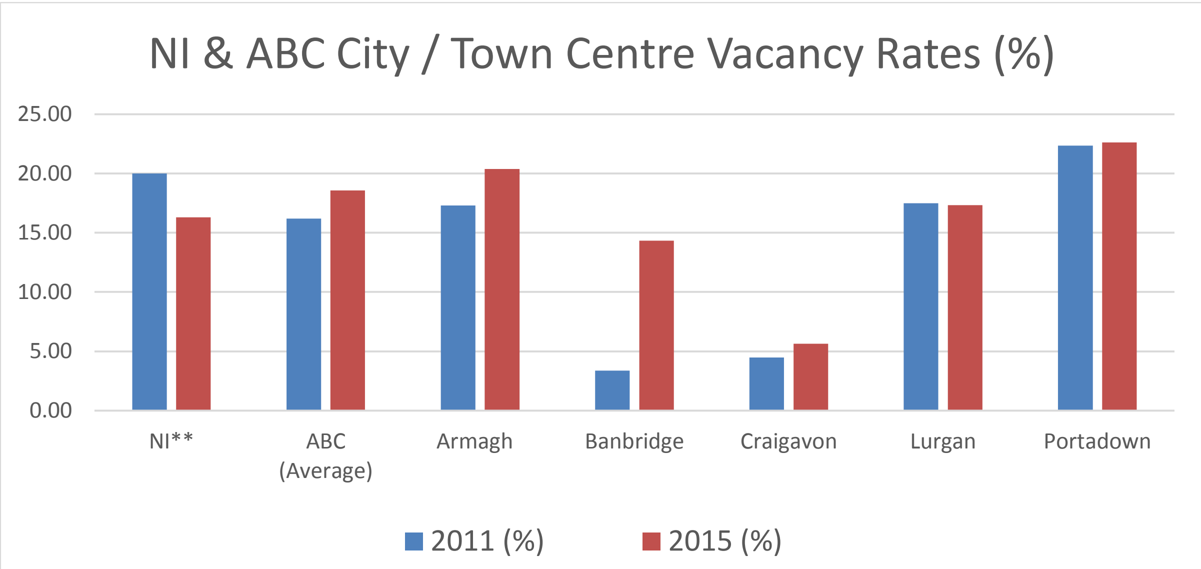


Figure 3

6.44 An important element of a vibrant town centre is a compact form which is well connected and walkable. In relation to the size (ha) of the existing city / town centres, Portadown is the largest (56 ha), followed by Armagh (52 ha), Craigavon (47 ha), Lurgan (36 ha) then the smallest, Banbridge (32 ha).
In relation to the number of units concentrated within these centres, Portadown has the most units (488) followed by Armagh (432) then Lurgan (358), Banbridge (293) and finally Craigavon with only 71.
It is generally accepted that Craigavon Town Centre is unique with its large format units (Tescos Extra, B&Q, Sainsburys, Homebase, Debenhams, Dunnes etc.) and large areas of car parking and varies from traditional NI town centres. This layout is more akin to a retail park and would explain the large hectarage of the centre and low number of units. In relation to the other four centres, it is notable that the ABC city / town centres with the highest level of vacancy, Portadown and Armagh are the largest in terms of size (ha) with the lowest number of units per square hectare (excluding Craigavon). Therefore, it may be worthwhile considering the extent of the town centre boundaries to ensure the offer is not diluted over a large disjointed area.

Table 6

Geographic Area (ha) of ABC City / Town Centres & Vacancy Rates:

City / Town Centre	Area (ha)	Total No of Town Centre Units	Total No of Units per sq ha	Vacancy Rate (%)
Armagh*	52	432	8.31	20.37
Banbridge	32	293	9.16	14.33
Craigavon	47	71	1.51	5.63
Lurgan	36	358	9.94	17.32
Portadown	56	488	8.71	22.34
ABC Total	223	1642	7.36	18.57

*Area surveyed is within Armagh Central Area Limit as no designated City Centre Boundary. **Source: Planning Surveys 2011 & 201**

Table 7

ABC CITY / TOWN CENTRE USES (2015):

Area	Comparison (%)	Retail Services (%)	Convenience (%)	Mixed Store (%)	Offices (%)	Leisure (%)	Vacancy Rate (%)	Total No
Armagh	26.62%	30.32%	6.02%	0.00%	14.58%	2.08%	20.37%	432
Banbridge	25.60%	29.69%	10.24%	0.00%	17.75%	2.39%	14.33%	293
Craigavon	60.56%	11.27%	15.49%	1.41%	5.63%	0.00%	5.63%	71
Lurgan	17.32%	33.52%	13.13%	0.00%	17.88%	0.84%	17.32%	358
Portadown	27.25%	25.61%	7.58%	0.20%	16.19%	0.82%	22.34%	488
ABC City / Town Average	26.07%	28.68%	9.20%	0.12%	15.96%	1.40%	18.57%	1642

Source: Planning Surveys 2011 & 2015

Key Findings from the Town Centre Studies:

6.45 It can be concluded that the five centres of Armagh, Banbridge, Craigavon, Lurgan and Portadown have varying levels of performance:

Armagh

- As one of the most historic cities in Northern Ireland, Armagh's distinct character and heritage must be protected and conserved. Its potential as a unique tourist destination should be developed and promoted.
- The centre has a good mix of independent and small retailers and although overall the vacancy rate is above the Northern Ireland average, the main shopping street (Scotch Street) has a vacancy rate of 11% indicating that it is performing well.
- There is a vibrant evening economy centring around Market Square and evening footfall makes up 18% of the total weekly footfall.
- There are no designated opportunity sites but vacant sites within the commercial centre at Ogle Street and the junction of College Street/Upper English Street offer opportunities for development.

Banbridge

- Retail provision in Banbridge is bolstered by an extensive range of high quality independent retailers. The factory Outlet at Cascum Road is another centre which may be considered as a complement to the town centre retail offer or alternatively threaten its vitality. Take-up of Development Opportunity sites has been very limited. Of the twelve sites designated in the BNMAP2015 only one has been partially developed.
- There has been a dramatic increase in vacancy rates from 2010 to 2015 however at 14.33% the overall vacancy levels in Banbridge are well below the Northern Ireland average which indicates that the town centre is relatively healthy.

Craigavon

- Retail provision in Craigavon is unique with most of the shops contained within Rushmere Shopping centre and the adjacent retail park. Comparison shopping is well above the ABC average at over 60% and unlike other town centres the service offer is focused on food and beverages with no banks, building societies, bookmakers or professional/legal services.
- Vacancy rates are extremely low at 5.63% and the centre has the highest weekly footfall estimated at 100,000 of all the 5 centres. The centre has 1800 parking spaces all of which are free.
- The town centre benefits from a high quality environment with good pedestrian links to nearby housing and the City Park and lakes.

- No development opportunity sites were identified in the Craigavon area Plan 2010 although there is scope for development at Lakeview Road.

Lurgan

- Lurgan town centre has a good range of independent, and some national retailers. Comparison shopping offer only accounts for 17.32%, the lowest of any of the 5 ABC town centres and significantly below the ABC average of 26.07%
- The vacancy rate by unit has fallen marginally since 2011 and at 17.32% is below the ABC average.
- Lurgan has excellent rail links to Belfast and Dublin and it served by a regular local bus service.
- The town centre benefits from high environmental quality and forms part of Lurgan Conservation Area with a variety of listed buildings. The centre is located adjacent to Lurgan Park/Brownlow House which offers an excellent recreational facility.
- There has been good uptake of the Development Opportunity sites. Two have been fully developed and one partially developed. The only site that hasn't been developed in at Castle lane but this has been the subject of various planning approvals.

Portadown

- Town centre retail offer is reasonably good, with a range of local independent, regional and national retailers. It has excellent public transport links by rail to Belfast and Dublin and a regular bus service.
- Vacancy rates at 22.34% in Portadown are higher than the Northern Ireland average but this figure is skewed by the extremely high vacancy level in the Meadows Shopping Centre which only has 5 occupied units. If the Meadows is removed from the calculation the vacancy rate for the remainder of the town centre is 18.95%.
- Of the six development opportunity sites only one (ASDA) has been developed. There is great potential to develop the lands at the River Bann for a variety of town centre uses.

6.46 Business rates have been cited as the primary factor in deterioration in the level of occupancy on the prime pitch (primary shopping streets) (Lisney 2013). The introduction of revised rateable values by LPS (effective from 1st April 2015) is anticipated to have the most significant impact on the retailing environment in the province in recent years. These revised non-domestic values will bring reductions in rates for prime retail shops on the high street (e.g. Upper English Street, Market Street, Scotch street and Thomas Street in Armagh; Newry Street , Bridge Street, Scarva street and Rathfriland Street in Banbridge; High Street, market Street and Bridge Street in Portadown and in the main shopping centres (e.g. Rushmere in Craigavon, High Street Mall and the Meadows in Portadown (Lisney 2014).

6.47 All five centres have a diverse range of shops, retail services, offices and other businesses. This reinforces the point that Town Centres are not just about shopping provision but are multi-functional locations that need to provide a range of uses including shopping, community, residential, office and leisure uses which important to the vitality of the Town Centre. Indeed the GL Hearn Report concludes that town centres need to offer an experience over and above the average functional shopping trip which might otherwise be carried out online or at an out-of-town retail park.

7.0 Local Towns

7.1 ABC also includes 6 local towns: Keady, Markethill, Tandragee, Dromore, Rathfriland and Gilford. A partial Health Check has been carried out for each of the towns and the information gathered is detailed below. As part of the new LDP, Members may wish to consider the hierarchy of towns and settlements.

7.2 Keady

- Keady benefits from strong cross border trade and cultural associations with the nearby towns of Castleblaney and Monaghan.
- The town has a good quality of built environment with a number of important listed buildings on both Kinelowen Street and Victoria Street. Landmark buildings include the Old Mill Building, and the new community centre (currently under construction) located off The Square. A planning application is currently under consideration for Environmental Improvements and includes new street furniture and signage.
- The traditional narrow streets in Keady can make traffic flow and parking problematic within the town and can cause traffic congestion. There are a number of public car parks and limited on street parking and the town benefits from a regular bus service.
- There are small clusters of vacant retail units both on Kinelowen Street and Market Street. The main convenience retailer within the town is Rice's Supermarket (NISA). There are also two small mini markets, the Spar and McGranes Store and Corner Café. There is a range of other independent retailers and a main post office. There are also a large number of hot food bars and nine public houses within the town.
- On the main Armagh to Keady Road located adjacent to the GAA ground is a small complex of shops clustered around McGleenan's Petrol Filling Station. There are four occupied units, which are a small Centra supermarket, an off-licence, a butchers and a diner.

7.3 Markethill

- Markethill has a good quality urban environment with a number of the listed buildings along Main Street and the Keady Road and a number of high quality independent retailers based close to The Square such as Hunters and Boots.
- There are a number of landmark buildings within the town including the former Court House (listed The Old Barn Steakhouse', 'Alexander's Department Store and the First Presbyterian Church (listed).
- There is a plentiful supply of on-street parking within the town and the former Police Station is used as an informal car park. There are regular bus services and a bus stop along Main Street outside Nisa.
- The main convenience retailers within the town are JD Hunters Supermarket (NISA) which includes a post office and the local mini market on Main Street. Markethill has a strong reputation for independent retailers including Dalzell, Alexander's and smaller retailers such as Hawthorns Ironmongers. Other independent retailers include boutiques, hairdressers, bridal salon, vets, barbers, bakers, three cafes, a laundrette and four public houses. There are a number of vacant retail units within the town including the former Soltex Carpet's site located at The Square, the former bank building at 66 Main Street.
- There is also a prominent gap site located at 97 Main Street. A small new retail development has recently been completed off Keady Street (Geddis Square) and this has four units (Bingham Pharmacy, Chinese Take-a-Way, NFU Mutual and Ulster Farmers Union Offices). A small business park is also located off the Fair Green Road and of the eighteen units two are currently vacant.

7.4 Tandragee

- Tandragee has a good quality urban environment with a number of listed buildings along both Market Street and Church Street. There are also a number of landmark buildings within the town including Tandragee "Tayto" Castle, St James's and St Mark's Churches and the Tandragee Library Clock.
- The Environmental Improvement Scheme within Tandragee has recently been undated with new paving, street lighting, trees and street furniture.
- There is plentiful on-street parking located at The Square and along Market Street with off street car parking at the bottom of Market Street adjacent to the public toilets. Bus stops are located at Market Street and The Mall on Church Street.
- There are a number of vacant commercial units as well as a large gap site along the street frontage at nos 26- 30 Market Street. Of a total of seventy one commercial units within the town, sixteen were vacant (22.5%). There are a number of cafes within the town as well as six hot food bars located on

Market Street. There are no leisure uses within the town centre although the town does have a recreation centre, football pitches and a golf course.

- There are no banks, however the Co- Op on Church Street has a Post Office and there is also a Credit Union. The main convenience retailers within the town are the Spar and the Co- Op. Town centre uses, comprising of independent retailers, include a hardware shop, pharmacy, shoe shop, jewellers, clothing retailers and travel agents as well as three public houses. There is also a small Arcade of shops off The Square.
- On the Portadown Road, outside the town centre, there is also a small complex of shops located which includes a Centra Supermarket (with a filling station) and four small retail units, three of which are occupied by a Chinese Fast Food Take Away, Dance Studio and Fish & Chip Shop.

7.5 Dromore

- Dromore is a Cathedral town of ancient origins.The town centre is within a Conservation Area, which extends along the river valley to the Motte to the east of the town and the disused railway viaduct to the west of the town, set within a park.
- The Market Square and Church Street form the commercial centre. The listed red-brick Town Hall building is the focal point of the Square and a key landmark. Church Street links Market Square to the listed Church of Ireland Cathedral, along the riverside. The Conservation Area extends beyond the town centre. The town centre retains a special character, derived from the narrowness of the streets, continuous frontages and the traditional style and scale of buildings.
- Current high levels of dereliction and vacancy detract in part from the town’s appearance. This is particularly evident along Market Street, Lower Mount Street and significant gaps along the north and west of the Market Square, where buildings have been demolished although the town hall building has recently been refurbished and there have been wider environmental and façade improvement works in the Square.
- An application for a retail store just off the Square, along Lower Street, is pending. This is part of a larger re-development scheme within the main Grahams Construction yard, to include residential units. The other gap sites around the Square are designated as Development Opportunity Sites in the Banbridge / Newry & Mourne Area Plan 2015, along with a number of backlands and river-side sites.
- Dromore’s role as a local service centre is evident. It has a post office (in the Square), two banks (Ulster Bank and Northern Bank along Church Street) and two local MLA constituency offices, in addition to a range of local food and grocery services. Professional services include a number of solicitors’ offices, two dental practices, an optician and an estate agent. The town centre also contains the town hall and library, a cycle shop, gift shops, clothes shops, two pharmacies, a number of public houses, take-aways and hairdressing / beauty salons. A supermarket (Super Valu) and filing station are located out of the town centre on Banbridge Road, with a smaller filling station / shop (Mace) on

the other side of the town centre, on Hillsborough Road. Both of these serve residential areas. Prince's Street and Meeting both have a number of commercial properties interspersed with residential properties.

- Small groups of existing housing at Cross Lane, Prince's Street, Iveagh Terrace and Meeting Street are protected as such in the Banbridge / Newry & Mourne Area Plan 2015, with the aim of contributing to the variety and vitality of life in the town centre.
- The police station building on Meeting Street/Banbridge Road is closed and for sale.
- An Ulsterbus depot is located along Hillsborough Road, with bus-stops in the Square outside the town hall / library. Town centre car-parks are located at Gallows Street/Lottery Place, Meeting Street and Cross Lane. On-street parking is available around the Square and along Prince's Street. Church Street and a number of other streets are too narrow for on-street parking, which can cause problems in terms of access, servicing and traffic flow.

7.6 Rathfriland

- Rathfriland is a traditional country market town. The heart of the town is along Main Street and the northern parts of Church Square and Downpatrick Street, where commercial activity is centred.
- The town centre is within a designated Area of Townscape Character (ATC) which extends further down Newry Street and includes the large water tower in Castle Street, which is a distinctive feature in the townscape, along with the scheduled ruins of the Castle and 1500's Tower House. The town retains its 18^{th} century layout and many of its listed 18^{th} and 19^{th} century Georgian buildings. The ATC is centred around Market Square and its listed Market House. Other key listed buildings are the Church of Ireland and the Edwardian former Northern bank, now partly containing a dental practice, and the Bank of Ireland at the corner of John Street which has been converted into an attractive café and gift shop.
- Church Square, the historic centre of the town, suffers from a significant level of vacancy. Commercial uses are limited to one bank (Ulster Bank), two public houses, a dental practice, a gift shop, two cafés, a hairdresser and a beauty salon. The Old Market House remains vacant on the ground floor. It has been the subject of a façade improvement scheme, along with other key vacant buildings / sites to enhance the town centre area. The remainder of Church Square contains residential properties, some unoccupied.
- The town offers a number of quality independent retailers selling clothes, shoes, jewellery, flowers, hardware and furniture, as well as local services providing daily and weekly requirements. A large convenience store (Nisa Extra) is located outside the town centre, with a petrol station opposite. A large Super Valu store is located on John Street. Professional services include a number of solicitors' offices, an accountants, an optometrist and a veterinary surgery.
- Other town centre uses include a credit union, library, health centre, the Rathfriland Outlook (newspaper) office, a number of public houses including The Old George Hotel (bar / restaurant) on Cadells Lane, as well as a number of take-aways, hairdressing / beauty salons and charity shops. A steel

manufacturer (Travers Steel) is situated on Downpatrick Street, along with a new modern Young Farmers Club Hall to the rear of the vacant listed police station building. Rathfriland Enterprise Centre (9 business units) is located on the edge of the town centre, off Downpatrick Street, and is fully occupied.

- The town centre retains a large portion of residential properties, with the existing housing at 3-19 John Street protected as such in the Banbridge / Newry & Mourne Area Plan 2015. Main Street, the main shopping street, has two vacant properties.
- The other town centre streets have a higher rate of vacancy and dereliction, which is most obvious on Dromore Street and Caddells Lane. Church Square has benefitted from a programme of environmental improvements and landscaping in recent years.
- Development Opportunity Sites exist either side of Cadells Lane and off Dromore Street, as indicated in the Banbridge / Newry & Mourne Area Plan 2015.
- An Ulsterbus depot is located along Downpatrick Street, from where local services start and finish. Car parking is mainly provided for by on-street spaces on Church Square, Main Street and Downpatrick Street, with two public car parks off Castle Street and adjacent to the bus depot off Downpatrick Street. The junction of Dromore Street with Main Street / Newry Street can be congested at peak times, but overall the town centre does not appear to suffer from any significant traffic congestion.

7.7 Gilford

- Gilford's town centre has a mainly linear form along Mill Street and Dunbarton Street as far as the Presbyterian Church and a short section of Castle Hill. These three streets converge at the Square outside the old library building. A main shopping core of small independent retailers interspersed with residential properties extends along Mill Street and Dunbarton Street.
- The town centre is within a designated Area of Townscape Character (ATC) which is characterised by a mix of two-storey and three-storey mainly mid-19th Century Georgian style terraced buildings which are mainly painted render finish. Other notable landmark buildings include the Presbyterian and Free Presbyterian Churches and some listed dwellings along Dunbarton Street, as well as the old 3-storey brick library building which overlooks the Square. This building currently lies vacant and boarded up, but has recently gained planning permission for change of use to office use. Dunbarton Street links the town centre to the listed former Gilford Mill complex, at Ann Street, which is a significant local landmark.
- The town centre contains a post office, credit union, a day nursery, two convenience shops, as well as a number of community uses and local services including a pharmacy. These are complimented by a number of public houses, take-aways, cafes and tea rooms, as well as some clothes shops, a bridal shop and hairdressing / beauty salons. Professional services include an Estate Agent, funeral director and a podiatry/chiropody clinic.
- The town centre has quite a number of vacant and derelict units and residential properties, particularly at the south end of Mill Street, including the recently vacated Royal British Legion building. These buildings detract from the appearance of the town.

- The urban environment is in good condition. A pedestrian / cycle linkage extends from the main street to the community centre and Stramore Park, across the River Bann.
- Re-development of the nearby Gilford Mill site could act as a catalyst for the regeneration of the town centre. This site is zoned for mixed-use development in the Banbridge / Newry & Mourne Area Plan 2015. The backlands behind Mill Street / Dunbarton Street are contained within a Plan-designated Development Opportunity Site.
- Parking spaces are available along the two main streets, with two parks also to the rear of Riverside Shopping Mall, off Bridge Street, and in Castle Hill. Buses pass through the town centre with the main pick-up and drop-off point in the Square outside the library. The town centre suffers traffic congestion at peak times, centred around the junction of Mill Street, Castle Street and Bridge Street (round-about). A relief road is proposed in the Area Plan between Bridge Road and Dunbarton Street (to the side of the library) to address this and improve traffic circulation in the town overall, but there is no committed timescale for this as yet.

8.0 Conclusions

8.1 The purpose of this paper has been to inform the committee about the nature of the current retail offer within Armagh City and the towns within Banbridge and Craigavon area, the take up of town centre development opportunity sites and vacancy rates. The draft SPPS requires LDP's to include a Retail Strategy and contain policies and proposals that promotes the town centre first for retail and other main town centre uses. In line with this, the Plan for the new Council Area will need to ensure that retail growth remains focused on the main centres. The importance of the retail hierarchy is also recognised and retail facilities in the small towns, villages and at a local level can complement the main centres.

8.2 The existing Area Plans which cover ABC recognise a settlement hierarchy which places Armagh, Portadown, Craigavon, Lurgan and Banbridge as the main town centres. Recent retail studies would suggest that the performance of the city/town centres is mixed. Some are functioning and competing well in the regional context in the aftermath of the economic downturn whilst others are struggling. Only Banbridge and Craigavon town centre vacancy rates are lower than the NI average. Although it should be highlighted that the vacancy rates in Banbridge have risen dramatically since 2011. There has been significant development of opportunity sites (DOS) in Lurgan with lesser uptake of DOSs in Portadown and Banbridge but it is worth noting that the BNMAP2015 was only adopted in 2013.

8.3 A notable development has been the re-evaluation of the commercial rates payable by Land Property Services (LPS) in April 2015. It is hopeful that this may lower the amount payable in key city / town centre areas and make them more affordable to retailers and lessen the vacancy rates in the town centres. This in turn, would also make these town centre locations more attractive than out of centre locations.

8.4 Within this hierarchy, ABC also has six smaller local towns, Keady, Markethill, Tandragee, Dromore, Rathfriland and Gilford. In the Population and Growth Paper previously presented to the Committee Members' suggestions were welcomed on alterations to the status of the existing settlement hierarchy which could be further explored at workshops with members.

8.5 While the Draft SPPS states that there should be a Town Centres first approach for retailing, it is worth exploring the role, form and merit of defining district centres, local /neighbourhood centres, and village centres. Additional designations of local towns, district centres, neighbourhood centres and village centres should be considered in the preparation of the new LDP so as to ensure their vitality within the overall hierarchy.

8.6 It is considered that further investigation is required to consider the extent of the existing Primary Retail Cores (PRC), the scope for designating them and extending existing PRCs. Consideration of this will require a thorough examination of retail capacity, full health checks and take up of opportunity sites. While the Planning land use surveys and take up of opportunity sites are up-to-date, the views of shoppers would be desirable to inform this aspect of the Plan. A detailed retail capacity study would address this and complete this information gap. It is therefore recommended that a retail capacity study be undertaken promptly to inform options for public consultation.

8.7 A key difference between the masterplans/development strategies and the Area Plan is that the masterplans/development strategies adopt a more pro-active holistic approach to the town centre, whilst the Area plan are more regulatory in nature. In preparing a new Local Development Framework, the opportunity exists to re-strike this balance and include the non-land use actions taken by the Council to improve the attractiveness and amenity of the town centres.

9.0 KEY FINDINGS

9.1 Key findings would indicate the following:

- That Armagh City, Banbridge, Craigavon, Lurgan and Portadown be reaffirmed as Armagh, Banbridge, and Craigavon's five main town centres in the Preferred Options Paper.

- That consideration be given to existing town centre boundaries, retail designations and opportunity sites as they currently exist and consider if they provide an adequate framework up until the new plan is adopted.

- That a retail capacity study be commissioned in the five city / town centres to determine their status and establish their capacity to support additional retailing.

- That a comprehensive health check be carried out for the city / town centres.

- That an appraisal be carried out to identify whether any settlements should be included in the Preferred Options Paper for reclassification from a village to a town and whether there is sufficient retail offer to warrant a town centre designation. Members input should be sought.

- That candidate locations should be appraised to establish whether any existing shopping facilities elsewhere in the ABC city / towns can be identified in the Preferred Options Paper as district / local / neighbourhood shopping centres.

- That villages should be appraised to establish whether there is sufficient facilities clustered together to warrant identifying as village centres in the Preferred Options Paper.

- That a policy review paper to consider the preferred approach for inclusion in the Preferred Options Paper. This may include suggested town centre policies and designations to reflect the changing role of town centres from retail led to multi-functional.

Appendix 1: Town Centres Health Check Indicators (English PPS4)

1. Town centre diversity: assessed in terms of types of uses (by number and, where available, by floorspace), in conjunction with analysis of Experian historic trends;

2. Floorspace in edge-of-centre and out-of-centre locations;

3. Potential capacity for growth or change: analysis of historic trends and identification of key opportunities in terms of vacant sites for expansion or clusters of vacancies which might point towards contraction;

4. Retailer representation and intentions to change: notable retailers present in the town and identification of any clear gaps in representation/evidence of retailer requirements in centres

5. Shopping rents: where available, details of rental levels in the prime shopping areas;

6. Vacancy rates: identification of ground-floor vacancies and observations on any notable clustering;

7. Commercial yields: where available, analysis of yield data to provide insight on investor confidence in the centres;

8. Pedestrian flows: observation of footfall on main shopping streets to assess vitality and identify main attractors within the centres.

9. Accessibility: consideration of opportunities to access the centre by non-car transport modes and provision of car parking.

10. Safety and crime: observations, including evidence of CCTV or police presence, vandalism and graffiti, limited to daytime and relating to the town centre only; and

11. Environmental quality: qualitative assessment of the town centre environment including dominance of traffic, ease of pedestrian movement and details of any recent investment in public realm.

Appendix 2: Glossary of Terms

Vitality of a Town Centre (PPS5): Vitality is a measure of how busy a centre is.

Viability of a Town Centre (PPS5): Viability is a measure of its capacity to attract ongoing investment for maintenance, improvement and adaptation to changing needs.

Town Centre / Retail Health Check: Retail Health Checks are produced to monitor the performance, or health, of the main retail centres within the Study Area. The report is based on retail planning guidance. Details of the topics and indicators which the check will normally include are detailed in Appendix 1:

Retail Capacity Study: A technical study to identify, in broad terms, the scope for new retail floorspace.

Town Centre Footfall: The number of people visiting a Town Centre in a period of time is called its footfall.

Vacancy Rates: This relates to the percentage (%) of vacant units within a defined area (e.g. Town Centre Boundary) and is usually presented by the number of units or by the floorspace (square metres).

Development Opportunity Site (DOS): Development Opportunity Sites are zoned where lands in city and town centres are under-utilised or vacant and where development, which might provide a mix of new uses, could promote the vitality and viability of the town centre, or could enhance the townscape, for example, by closing frontage gaps or by replacing unattractive features. Such development within a town centre could enhance shopping frontages, encourage pedestrian movement and so assist commercial growth. Housing including social housing can also be an appropriate use on Development Opportunity Sites with the added benefit of improving the security of a town centre by increasing the resident town centre population.

City /Town Centre: for the purposes of this paper, city/ town centre refers to 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.

Primary Retail Frontage (PRF): The PRFs in town centres comprise those parts of the town centres that should be retained in retail use. Proposals for non-retail uses at ground floor level within the primary retail frontages will be resisted in order to retain the focus of retail uses and ensure the maintenance of a compact shopping environment.

Primary Retail Core (PRC): PRCs normally contain the traditional concentration of retailing and other town centre functions. The purpose in identifying a PRC is to control the location, scale and nature of new development in each core and to provide conformity with the retail uses. This is to ensure the continuance of a compact, lively and attractive shopping environment, offering both choice and convenience, and to control the intrusion of non-retail uses in prime shopping areas. Proposals for retail development in town centres will, therefore, be directed towards the PRC in the first instance.

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

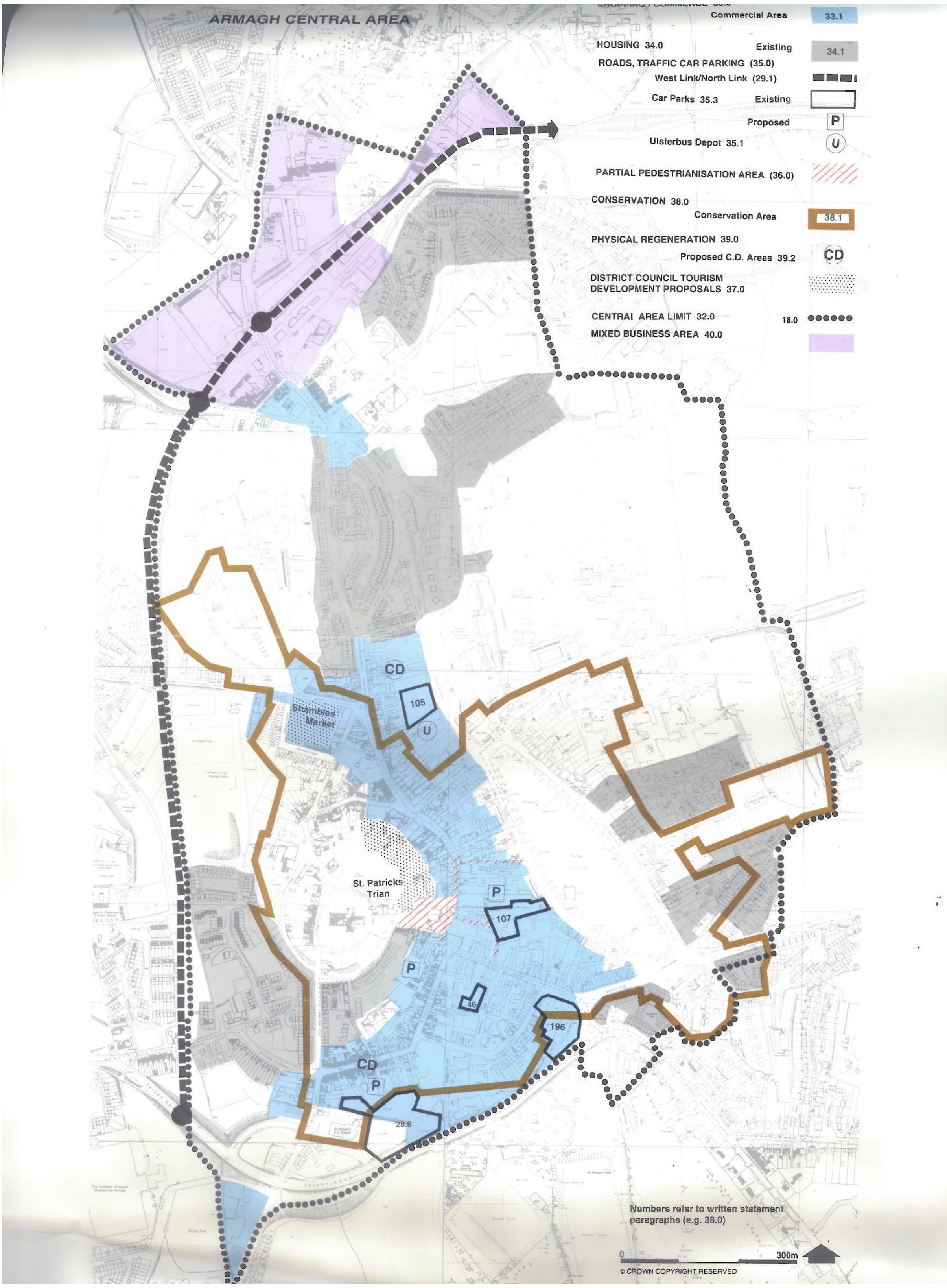
Local Centre: Small groupings of shops, typically comprising a general grocery store, a sub-post office, occasionally a pharmacy and other small shops of a local nature.

Convenience goods: Broadly defined as food, drinks, tobacco, newspapers, magazines, cleaning materials, toilet articles.

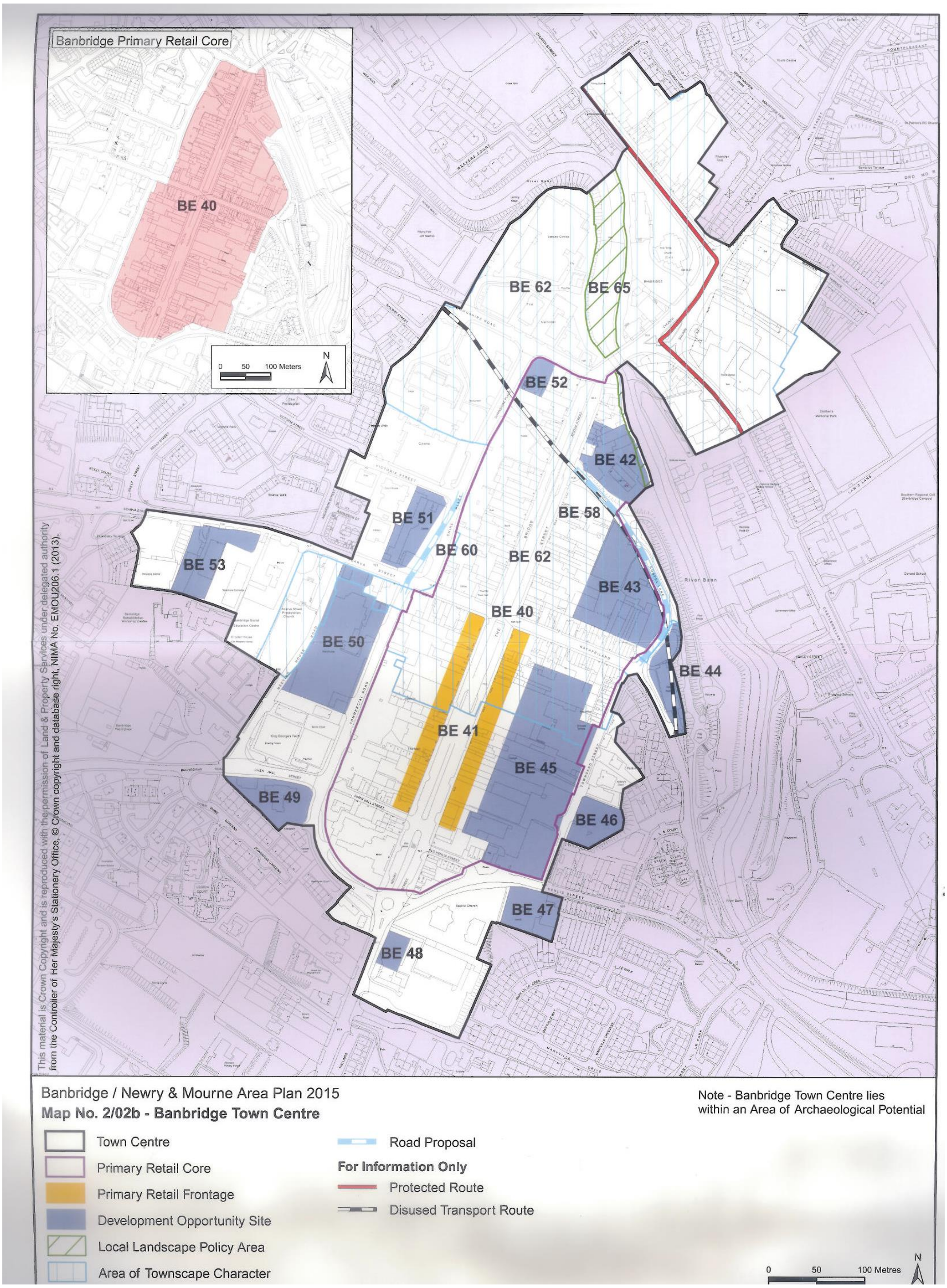
Comparison goods: These refer to shopping for things like clothes, products, household and leisure goods which are not bought on a regular basis.

Retail Services: Retail Services comprise, for example, services such as hairdressing, beauty salons, launderettes, dry cleaners, post office, clothing hire, opticians, travel agents, filling stations and vehicle rental.

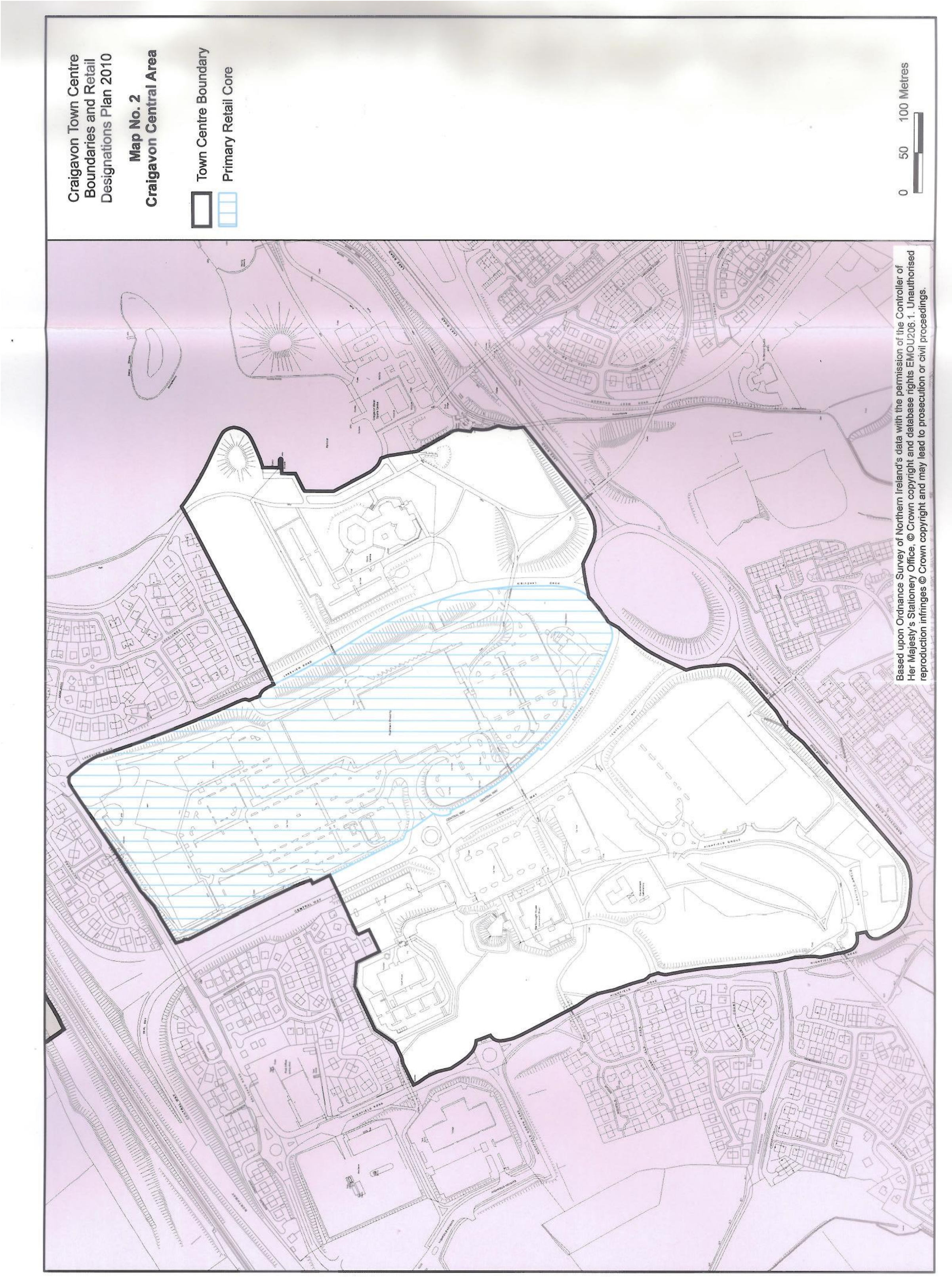
Appendix 3: Armagh City Centre (Central Area) Map



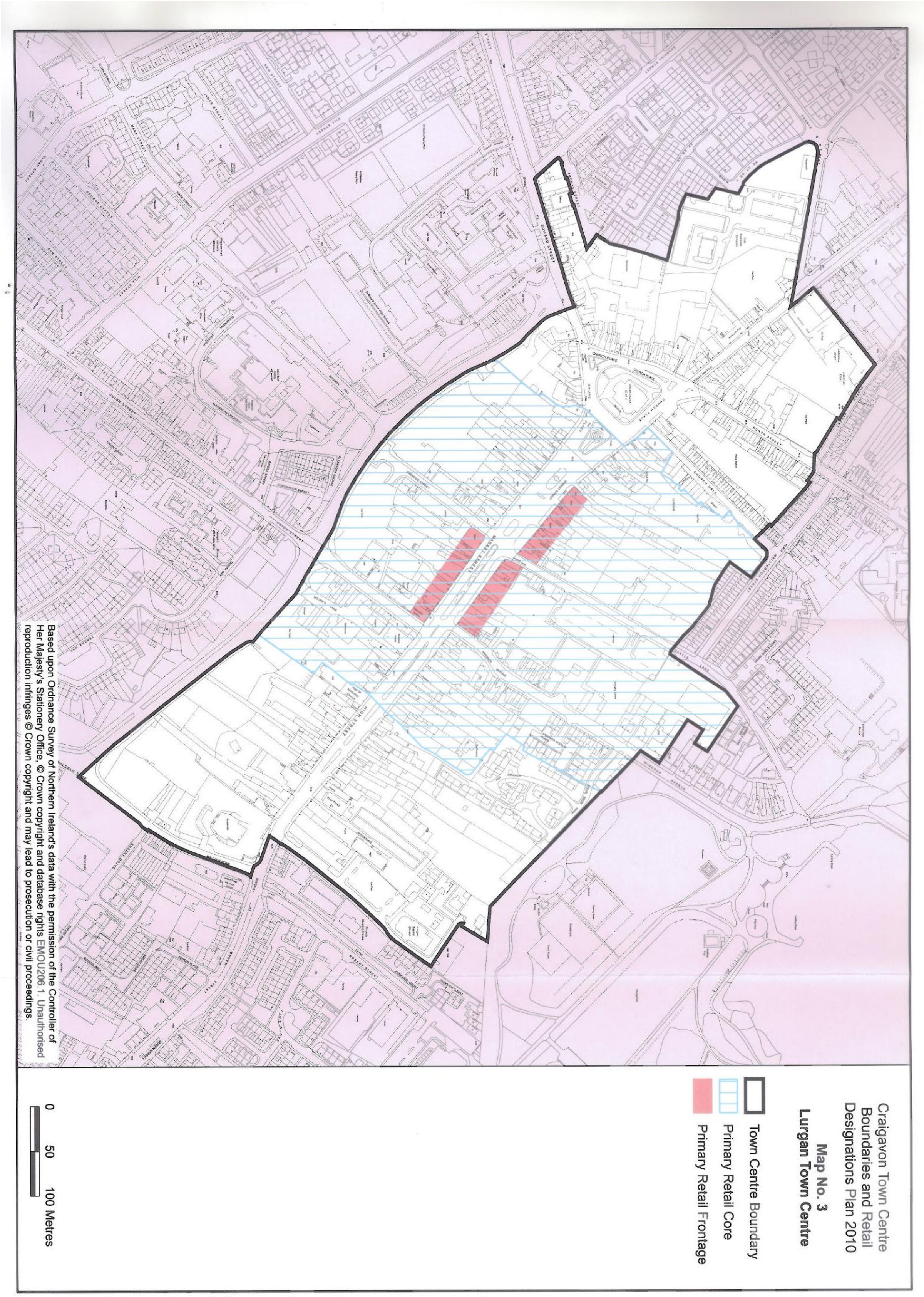
Appendix 4: Banbridge Town Centre Map



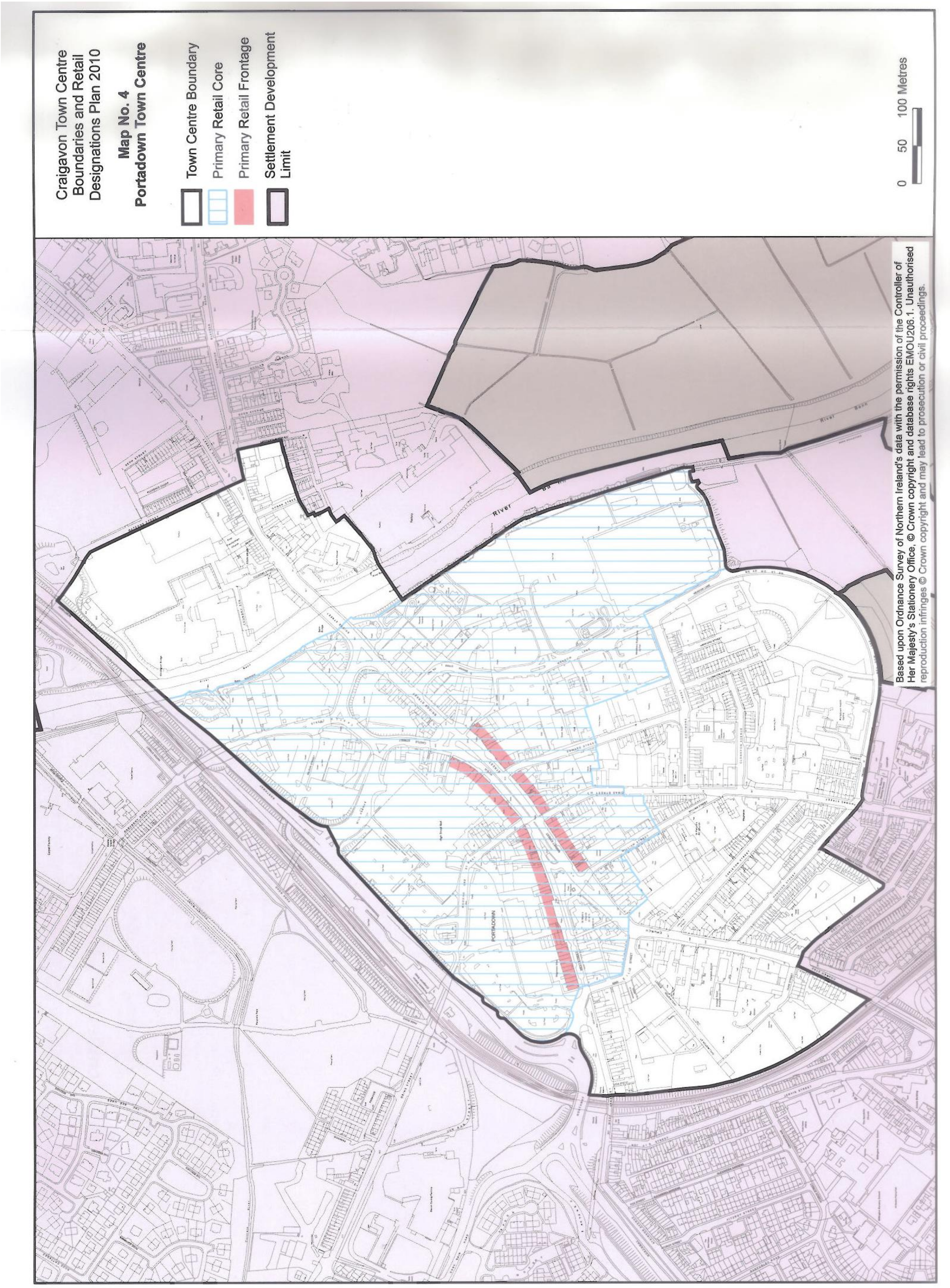
Appendix 5: Craigavon Town Centre Map



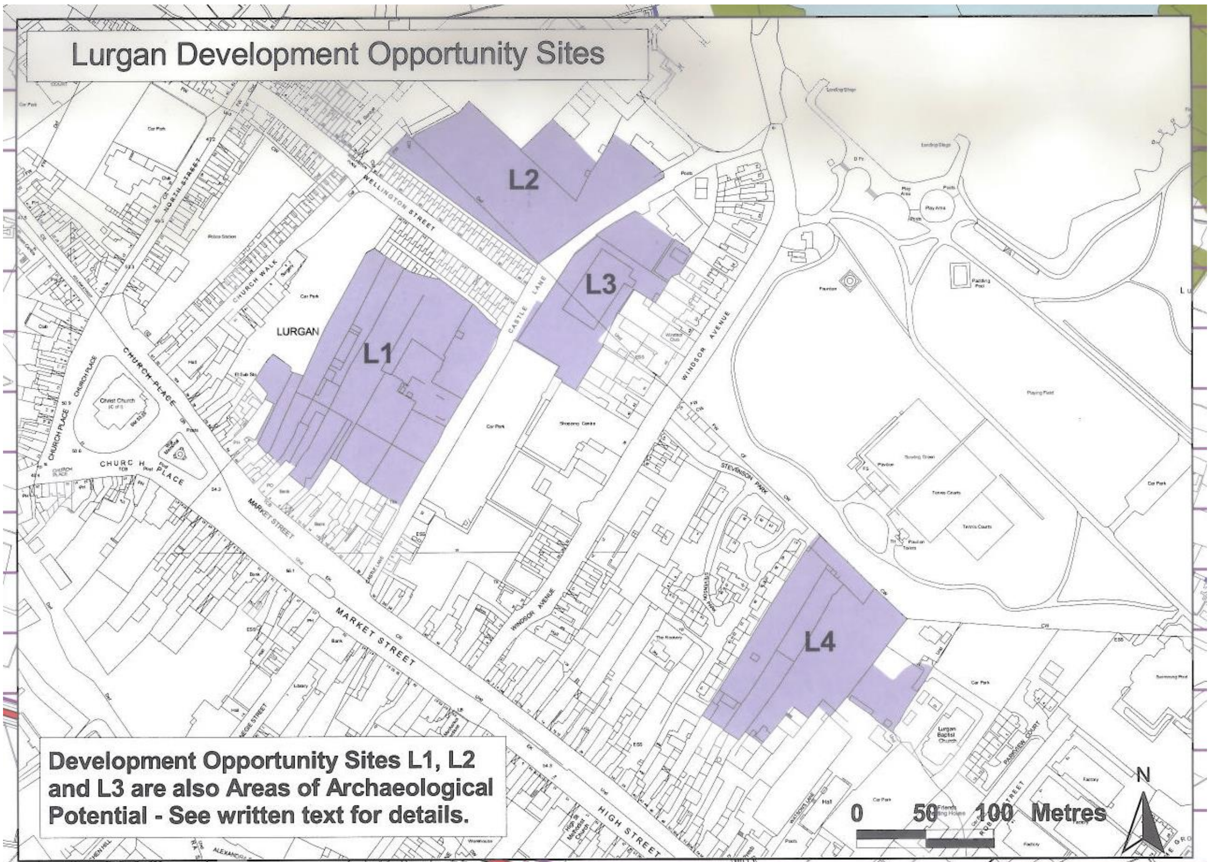
Appendix 6: Lurgan Town Centre Map

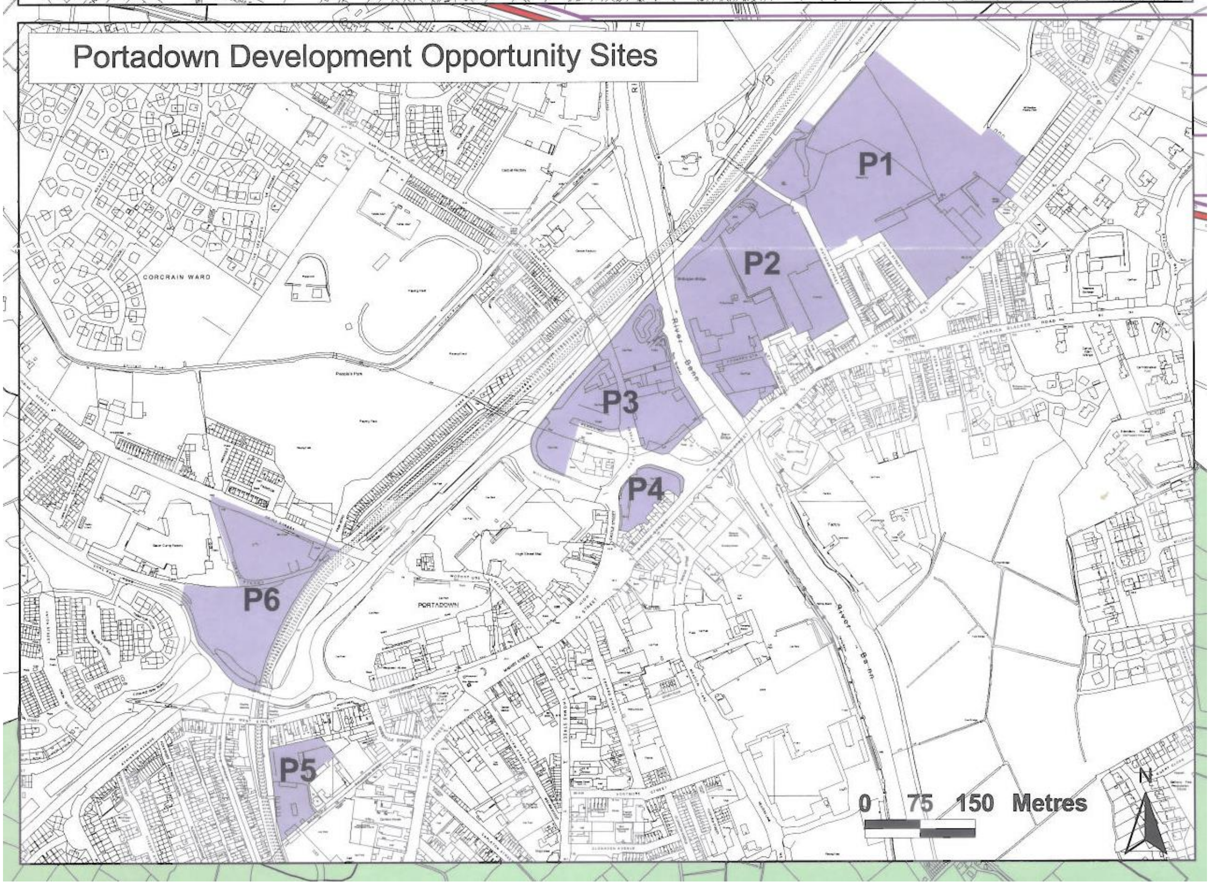


Appendix 7: Portadown Town Centre Map



Appendix 8: Lurgan & Portadown Development Opportunity Site (DOS) Maps





Armagh Banbridge and Craigavon District Council – Planning Department
Marlborough House
Central Way, Craigavon
planning@armaghbanbridgecraigavon.gov.uk Tel:03002007830 (NI) or 02838313690