



# RETAIL AND COMMERCIAL LEISURE STUDY

ON BEHALF OF ARMAGH CITY, BANBRIDGE & CRAIGAVON BOROUGH COUNCIL

January 2023

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# 1. Introduction

## Overview

- 1.1 This Retail and Leisure Study was commissioned by Armagh City, Banbridge & Craigavon Borough Council (the Council) in 2022. The preparation of the Study has been led and co-ordinated by Nexus Planning (“Nexus”), with specialist input from NEMS Market Research on the empirical survey work, and Experian on data production.
- 1.2 The purpose of the Study is to inform the preparation of the Local Development Plan (LDP). It aims to provide the Council with an up-to-date, objective assessment of retail and leisure development needs in the Borough and considers possible strategic policy responses to any prevalent or emerging issues.
- 1.3 The Study has been prepared to reflect the latest Department for Infrastructure (DfI) guidance provided in the Regional Development Strategy 2035 (RDS) and Strategic Planning Policy Statement (SPPS, September 2015).

## Structure of the Study

- 1.4 This report is structured as follows:
  - a. Section 2 provides a summary of the key national and local retail policy context relevant to the Study.
  - b. Section 3 summarises key current and future retail trends and, in doing so, provides the overarching context for this Study and how it can be used to guide plan-making.
  - c. Section 4 defines the Study Area and describes the Household Survey undertaken to inform this Study. It summarises the key findings on internet shopping patterns, and the survey-derived market-share analysis for convenience and comparison goods retailing at ‘bricks and mortar’ locations, as well as comments on the existing leisure trends. The results of the quantitative capacity assessment for new retail (comparison and convenience goods) and leisure floorspace in the Council area are described in detail.
  - d. Sections 5 to 17 sets out the health-check assessment, including the findings of the stakeholder consultation that took place as part of the study.
  - e. Section 18 sets out a benchmarking exercise.
  - f. Section 19 provides guidance to inform the emerging Local Development Plan on the following matters: The hierarchy of centres; the spatial extent of centres; review of opportunity sites; and, recommended planning policy approach.

## 2. Policy and Legislative Context

### Introduction

- 2.1 In this section, we provide a succinct account of the current national and local policies relevant to retail planning and town centres, as well as the latest relevant legislative context. This review provides a benchmark of the existing policy context, as well as the basis to formulate strategy and recommendations.

### National and Regional Planning Policy Context

- 2.2 **The Regional Development Strategy 2035 (RDS)** is a long-term plan to 2035 which aims to deliver the spatial aspects of the Northern Ireland Executive's Programme for Government. Within the Council boundary, the RDS seeks to promote Armagh, Banbridge and Craigavon as an economic 'main hub'. The RDS comments further as follows (paragraphs 3.78 to 3.81):

- Craigavon, Banbridge and Armagh have the potential to cluster and to capitalise on their strategic position on the Belfast/Dublin and Belfast/Enniskillen/Sligo economic corridors.
  - Craigavon Urban Area is made up of the three centres of Lurgan, Portadown and Central Craigavon with a growing population of around 65,000. It is the third largest centre, in terms of population, in Northern Ireland and performs a strong sub-regional function, offering a wide range of services and facilities including an acute hospital.
  - Central Craigavon is a unique town centre with a built form that dates back less than 40 years. It has a well-established retail function, a strong manufacturing and industry base and benefits from a lakeland setting with leisure and tourism functions. It is well connected to both Belfast and Dublin.
  - Lurgan benefits from its location on the railway line and easy access to the M1 Motorway. Much of the town centre is within a Conservation Area designation and Lurgan Park, the largest urban park in Northern Ireland, which is located immediately adjacent to the town centre. Oxford Island National Nature Reserve is situated on the outskirts of Lurgan and incorporates the Lough Neagh Discovery Centre offering a unique leisure and tourism facility.
  - Portadown benefits from its drive time to Belfast of around 30 minutes and being a stop on the Belfast to Dublin railway line. Portadown's potential for a rediscovered and rejuvenated riverside area will lead it to become a location for a modern mixed-use development area centred around leisure and town centre living.
- Banbridge has a good quality natural and built environment, excellent sports and leisure facilities, an abundance of parks and open spaces and a robust telecommunications infrastructure. The sectors with the strongest employment are manufacturing, construction and retail. The economic development of the district in recent years has been mirrored by significant investment in wider social and environmental improvements. 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.
- Armagh City, with a population of around 15,000, has a unique sense of place, with a significance and influence felt across the island for 6,500 years. Armagh is a rich heritage and tourism destination with an abundance of

cultural product – the rich Georgian architecture, cathedrals, museums, a planetarium and Navan Fort. Armagh’s potential, in tourism terms, relies largely upon strategic improvements to the transport corridor around the city.

- 2.3 The RDS is largely silent on broad retail and leisure matters, which are instead dealt with in the Strategic Planning Policy Statement (SPPS, September 2015).
- 2.4 The **Strategic Planning Policy Statement (SPPS, September 2015)** contains policy on Town Centres and Retailing in Paragraphs 6.267 to 6.292. This document cancelled the previous PPS5: Retailing and Town Centres. The SPPS also links into the regional policy guidance contained within the RDS.
- 2.5 The aim of the SPPS is to support and sustain vibrant town centres across Northern Ireland through the promotion of established town centres as the appropriate first choice location of retailing and other complementary functions consistent with the RDS. The SPPS defines ‘acceptable town centre uses’ as cultural and community facilities, retail, leisure, entertainment and businesses. The Regional Strategic Objectives are listed at Paragraph 6.271 as follows:
- secure a ‘town centres first’ approach for the location of future retailing and other main town centre uses;
  - adopt a sequential approach to the identification of retail and main town centre uses in Local Development Plans (LDPs) and when decision-taking;
  - ensure LDPs and decisions are informed by robust and up to date evidence in relation to need and capacity;
  - protect and enhance diversity in the range of town centre uses appropriate to their role and function, such as leisure, cultural and community facilities, housing and business;
  - promote high quality design to ensure that town centres provide sustainable, attractive, accessible and safe environments; and
  - maintain and improve accessibility to and within the town centre.
- 2.6 Following on from this, the SPPS sets out Regional Strategic Policy to be taken into account in the preparation of LDPs and in the determination of planning applications. This includes a town centres first approach, an assessment of need across the authority area, regular health-checks (preferably at least once every 5 years), a strategy for town centres and retailing together with appropriate policies and proposals (including to retain and consolidate existing District and Local Centres), definitions of the Retail Hierarchy and the boundaries of existing centres and allocations for suitable retail and other town centre use sites where appropriate (para 6.272-6.276).

## Local Planning Policy Context

- 2.7 The extant area plans for the Borough consist of:
- Armagh Area Plan (AAP) 2004;
  - Armagh Area Plan 2004, Alteration- No.1 - Armagh Countryside Proposals;
  - Banbridge, Newry and Mourne Area Plan (BNMAP) 2015;
  - Craigavon Area Plan (CAP) 2010;

- Craigavon Town Centre Boundaries and Retail Designations Plan 2010; and
- Dungannon and South Tyrone Area Plan (DSTAP) 2010.

2.8 Due to the varying ages of the current Statutory Plans, there is a clear variation in the approach to town centres and retailing across the Borough, which would require streamlining.

2.9 The Council is now preparing its first Local Development Plan (LDP). The LDP will apply regional policies at the local level guiding development decisions within the Borough until 2035.

2.10 In laying the groundwork for that, the Council has produced a number of Masterplans and Strategies for our Borough:

- **Masterplans and Development Frameworks** - A common thread that runs through the various Masterplans is that the centres lack life, particularly in the evenings, and, by invigorating the evening economy, the town centre experience can be enriched.
  - **Armagh has a City Centre Masterplan in place (2009)** and also benefits from **The Armagh Place Plan (March 2022)** which has been developed to bridge the gap between spatial and community planning for the city. It is designed around four outcomes; a connected city, a green city, an engaging city and a healthy city. The outcomes, suggestions and ideas from the community have been central to the development of this plan. The plan contains thirty actions which will be delivered by the Plans partners to embrace the vision of the outcomes.
  - Regeneration strategies for Craigavon, Portadown and Lurgan are contained within the **Craigavon Integrated Development Framework (CIDF, 2010)**.
  - **Banbridge Town Centre Masterplan (2016)** sets out the regeneration objectives for Banbridge.
  - **Dromore Town Centre Master Plan (2015)** defines a vision of how Dromore town centre could be transformed 2015-30.
- **Regeneration and Development Strategy** - sets out the Council's framework for achieving very specific goals, including: becoming the most business-orientated council area in Northern Ireland and increasing average tourism spend to equal the highest in Northern Ireland. Critically, the R&DS identifies a need to review town centre designations for Craigavon Urban Area, Armagh and Banbridge to ensure compact retail centres, in addition to acknowledging the changing role of town centres from retail led to multi-functional.
- **Tourism Strategy 2017 -2022** identifies tourism as one of the key sectors which can drive economic growth in Northern Ireland and, as such, the Vision of the Strategy is for the Borough to be a market leading cultural tourism destination in Ireland by 2022.
- **Evening & Night Time Economy (ENTE) Development Strategy (2018)** focuses on collecting data in relation to Armagh, Banbridge, Craigavon, Lurgan, Portadown, and Dromore presenting key issues and potential ideas on tackling these.
- **Active Travel Masterplan (2021)** - ABC Council have produced an 'Active Travel Masterplan' which considers active travel (pedestrian and cycle) between Portadown railway station and Lurgan railway station along the Craigavon greenway (principally using the Craigavon 'black paths' network) with connections to the Carn / Seagoe employment areas. It also considers provision of public bicycle parking in our city / main towns.

- **ABC 'empty to occupied' Scheme** - The Council ran a successful 'empty to occupied' scheme to bring back to use vacant prominent town centre sites. The scheme has issued letters of offer to successful applicants and projects are progressing. The scheme is now closed to new applicants as the funding has all been committed.
- **Emerging Documents** - ABC Council is also developing:
  - **Banbridge Place Plan** - ABC Council is the leading partner in developing the new Banbridge Place Plan which helps bridge the gap between spatial and community planning. Instead of taking the traditional approach of focusing on physical sites and changes first, creative community engagement is at the heart of the place making process. The Plan is expected to commence in November 2022
  - **Dromore Place Plan** - ABC Council is the leading partner in developing the new Dromore Place Plan which helps bridge the gap between spatial and community planning. Instead of taking the traditional approach of focusing on physical sites and changes first, creative community engagement is at the heart of the place making process. The Plan is expected to commence in June 2023.
  - **ABC Market Strategy** is a borough wide Market Strategy which is in the initial stages of developing.
  - **ABC Parking Strategy** is for our city / main towns to consider parking provision, location, cost & access.
  - **ABC Events Strategy** - work is ongoing on the Events Strategy and it will be followed by an Events Framework in terms of operational planning.

**2.11 Armagh City, Banbridge and Craigavon Borough Councils 'Preferred Options Paper' (POP) (2018)** is the first of three public consultation documents that the Council will issue during the LDP process. The main purpose of the POP is to promote focused debate on key issues of strategic significance which are likely to influence the direction of future development within our Borough up to 2030. The POP outlines the vision and strategic objectives of the Plan, along with a set of key issues and the possible options available to address them. The POP sets out the preferred options for:

- Housing allocations, whereby housing growth is to focus on the Hubs (Armagh, Banbridge and Craigavon) whilst sustaining rural communities to reflect regional direction;
- Classification of a retail hierarchy (Table 7.2); this seeks to define a four-tier approach to a hierarchy. In this Study we will comment on the proposed hierarchy and seek to categorise the main towns and retail centres within the hierarchy;
- As part of this Study, undertaking a review and identification of Town Centre Boundaries and Primary Retail Cores, where appropriate, accompanied by policy to protect and strengthen town centres;
- Promoting town centres as first choice locations for a variety of complementary town centre uses to facilitate the growth of the evening and night-time economy;
- Reviewing existing Development Opportunity Sites (DOSs) as designated, and identifying new DOSs, where appropriate. DOSs are designated with an aim to promote and regenerate the town centres, by improving our streetscapes through the closure of frontage gaps, redevelopment of vacant sites and the replacement of unattractive features; and
- Allowing UCO Class B1\* Business Uses in Town Centres, District Centres or Local Centres and within Economic Development Zones (as identified in the LDP) as part of a sequential approach.

- 2.12 The POP has also been supported by a number of evidence based Preparatory Papers. **Preparatory Paper 4 ‘Town Centres’ (2015)**, provides a summary of historic town centre health checks for Armagh, Banbridge, Craigavon, Lurgan, Portadown, Keady, Markethill, Tandragee, Dromore, Rathfriland and Gilford.
- 2.13 We consider a number of these themes in detail in our recommendations section.

## 3. Current National Retail and Leisure Trends

### Introduction

- 3.1 In order to provide a context for this Study, we provide an overview of current retail and leisure trends below. It should be noted that the retail and leisure sectors are dynamic and that new retail and leisure formats continue to evolve to meet our everyday needs. The below commentary should therefore be taken as a 'snapshot'. This is particularly the case given the current commercial circumstances and cost of living crisis arising from the Covid-19 pandemic, Brexit and the war in Ukraine.

### The Current State of the UK Economy

- 3.2 The UK economy has experienced a significant shock as a result of the Covid-19 pandemic (which started in early 2020) and subsequent restrictions on movement and behaviour which have sought to mitigate its impact. This uncertain background has caused business investment and expenditure to decline. Due to Covid-19, GDP declined by 9.9% in 2020, which was more than twice the fall experienced in the last crash in 2009<sup>1</sup>. However, at the time of writing, the UK GDP in Q1 2022 reached broadly similar levels to that of Q4 2019<sup>2</sup>, which would indicate recovery.
- 3.3 However, expectations for growth in the second half of 2022, at 3.5% are now less than half the 7.5% growth recorded in 2021. Quarter on quarter, GDP is expected to flatline with no growth expected in Q2 and Q3 before contracting by 0.2% in Q4. This negative outlook reflects a combination of soaring inflation<sup>3</sup>, tax rises and the global economic shocks - initially caused by Covid-19 and then compounded by the war in Ukraine<sup>4</sup>. Annual UK economic growth is expected to slow sharply to 0.6% for 2023 before recovering slightly to 1.2% in 2024.
- 3.4 Looking at Northern Ireland, NISRA reports<sup>5</sup> that economic activity had increased gradually in recent years (2013-2019) following the prolonged downturn post 2007. The NI Composite Economic Index (NICEI) has recovered from their respective series lows in Q2 2020 (which coincided with a period of strict lockdown restrictions) and have returned to levels of economic output last exceeded in Q2 2008. The level of economic activity in Northern Ireland currently sits 1.1% below the maximum value recorded in Q2 2007 whilst UK GDP is estimated to be 15.4% above its pre-economic downturn peak<sup>6</sup>.
- 3.5 The forecast from the National Institute for Economic and Social Research (NIESR) show that Northern Ireland's economy will be one of the better performing UK regions in the next few years, primarily due to the "reorganisation" associated with the Northern Ireland Protocol<sup>7</sup>. The NIESR forecasts that by the end of 2024, Northern Ireland output will be 3.3% above the pre-pandemic level, on a par with Wales and behind London (7%) and the North of England (4.1%)<sup>8</sup>.

<sup>1</sup> [ONS, Coronavirus and the impact on output in the UK economy: December 2020, 12 February 2021](#)

<sup>2</sup> [ONS, Gross Domestic Product: chained volume measures: Seasonally adjusted £m, 12 May 2022](#)

<sup>3</sup> [The UK inflation rate is expected to reach 10% in Q4 2022, outpacing average earnings growth - British Chambers of Commerce Economic Forecast: Testing times as quarterly growth dries up, 8 June 2022](#)

<sup>4</sup> [British Chambers of Commerce Economic Forecast: Testing times as quarterly growth dries up, 8 June 2022](#)

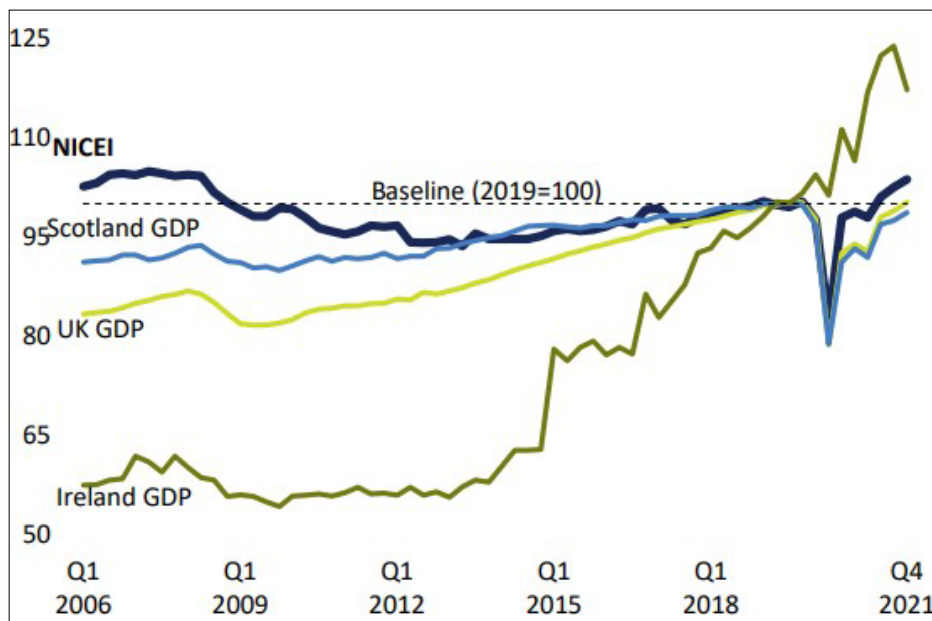
<sup>5</sup> [NISRA, Economic Activity in Northern Ireland by quarterly NI Composite Economic Index \(NICEI\) Experimental statistics Quarter 1 \(January-March\) 2022](#)

<sup>6</sup> [NISRA, Northern Ireland Composite Economic Index Quarter 4 2021, 31st March 2022](#)

<sup>7</sup> [The Northern Ireland Protocol keeps Northern Ireland inside the European Union \(EU\)'s single market for goods, which means that, unlike the rest of the UK, it continues to have access to the EU single market.](#)

<sup>8</sup> [BBC News, 9 February 2022](#)

Figure 3.5.1 NICEI Comparison with selected GDP measures Q1 2006 – Q4 2021<sup>9</sup>



- 3.6 The UK is also experiencing unprecedented cost of living increases whereby commodity prices and energy costs have surged upwards. The Consumer Prices Index (CPI) is expected to reach 10% in Q4 of 2022, which is the highest CPI 12-month inflation rate in the National Statistic series since records began 1989<sup>10</sup>.

Figure 3.6.1 ONS, Consumer Prices Index<sup>11</sup>



<sup>9</sup> NISRA, Economic Activity in Northern Ireland by quarterly NI Composite Economic Index (NICEI) Experimental statistics [Quarter 1 \(January-March\) 2022](#)

<sup>10</sup> [British Chambers of Commerce Economic Forecast: Testing times as quarterly growth dries up, 8 June 2022](#)

<sup>11</sup> [ONS, Consumer price inflation, UK: May 2022](#)

## The Retail and Leisure Economy

3.7 The retail sector has endured a particularly difficult pandemic, with multiple lockdowns and online competition leading to the permanent closure of many shops and businesses. In addition to these challenges, there has also been significant increases to business costs including energy & transport costs. UK high streets have already been in continuous decline since the 2007 recession<sup>12</sup>, with consumer habits moving away from the traditional high street experience. The pandemic, however, accelerated these pre-existing challenges, including creating an unprecedented rise in online shopping.

3.8 CoStar's Retail National Report UK 2022 reports<sup>13</sup> the following:

- Over 2021/2022 the recovery in the retail sector has been observed as the lifting of pandemic restrictions has boosted both footfall and retail sales, and the revival in leasing.
- However, recent positivity comes with its caveats - rising inflation and the rapidly escalating cost-of-living has dented consumer confidence in recent months, with GfK's confidence index falling to a record low in May 2022
- Meanwhile, retail rents continue to fall and further rent losses are likely in the near term, although retail parks and supermarkets are well placed to outperform given recent demand trends.
- On the supply side, the pandemic has caused the delay, cancellation or amendment of many retail projects across the UK. The 7.3 million square foot of retail space currently under construction nationally represents the lowest figure in more than a decade and less than half the amount underway at the height of the financial crisis in early 2009. Plans are in place to convert many shopping centres and department stores into other uses, too. Little new space is therefore likely to be added on a net basis in the coming years. The trend of converting retail space to other uses is also likely to accelerate.
- UK retail investment has slowed sharply since the coronavirus crisis began. Investor sentiment towards the retail sector, which was already weak prior to the pandemic, has worsened, with property prices dropping to a greater extent than for other sectors. Retail parks have proved popular over the past year or so, thanks to their relative outperformance during the crisis, while shopping centre transactions have also picked up as some investors target redevelopment or repositioning plays.

3.9 Looking at the hospitality sector, according to latest research<sup>14</sup>, it saw the biggest economic declines of all sectors during the pandemic. Periods of public health restrictions saw large falls in output. The peak of the economic downturn was in April 2020, where economic output in the food & accommodation sector was 90% below pre-pandemic levels (February 2020). Overall, hospitality economic output over 2020 was 42% lower than 2019; and In 2021, hospitality output was 21% lower than 2019. The hospitality industry's share of the UK economy fell from 3% in 2019 to 2% in 2020 and 2021. However, as all coronavirus restrictions were lifted from early 2022, the hospitality sector continues its recovery, particularly as international tourists return. It is forecasted that the hospitality and leisure sectors are expected to be the

<sup>12</sup> In 2011, the Portas Review summarised the challenges for high street retailers as follows: "The phenomenal growth of online retailing, the rise of mobile retailing, the speed and sophistication of the major national and international retailers, the epic and immersive experiences offered by today's new breed of shopping mall, combined with a crippling recession, have all conspired to change today's retail landscape".

<sup>13</sup> CoStar's Retail National Report UK 2022

<sup>14</sup> [House of Commons Library – Research Briefing - Hospitality industry and Covid 19, 11 May 2022](#)

fasted growing parts of the economy over the next five years. This in part reflects the large ground to be recovered following the pandemic.

- 3.10 To address the growing concerns associated with the High Street, in August 2020, the High Street Task Force for Northern Ireland was created by the Government; and in October 2021, Ministers launched an associated call for evidence. The High Street Task Force Call for Evidence Report 2022 was subsequently published<sup>15</sup> and based on this evidence, the High Street Task Force Delivering a 21st Century High Street<sup>16</sup> report was produced. This report summarised the key challenges and provides 14 number of recommendations to support the growth of local town centres and villages. Notably, recommendation 11 advises a review of the planning processes, particularly by reviewing permitted development rights and the Use Classes Order.

## Consumer Spending

- 3.11 Experian Retail Planner Briefing Note 19 (2022) makes a number of comments regarding consumer spending, albeit this pre-dates the Ukrainian War<sup>17</sup>:

- Retail spending bounced back swiftly following the easing in Covid 19 related restrictions. However, it is losing momentum in the near term as weak confidence and cost pressures weigh on the recovery. Spending should grow over the course of 2022 assuming government measures successfully limit the fallout on jobs and business failures, though its strength is likely to be weakened by muted real wage increases.
- Over the medium term, retail sales volumes are expected to return to a stronger footing with the removal of Brexit and Covid-19 related uncertainty and a strengthening economic backdrop. However, the weakened financial positions of households, businesses and government will be a constraint and spending volumes will remain, on average, 6% below levels expected before the crisis. In the long term, the Covid-19 crisis is unlikely to impact on the economy's growth potential. Although increasing inflation will also be an important factor.
- The short-term outlook for convenience goods has been upgraded by Experian to reflect the boost to spending on food from social distancing measures such as working from home. However, these are expected to unwind over the medium/longer-term, returning the growth-per-head back down to 0.1% per annum.
- Comparison goods retailer margins are under considerable pressure due to rising costs and price discounting, threatening store viability. Experian predicts that sluggish expansion in household incomes and tepid consumer confidence will result in a limited ability or appetite for spending.
- Leisure spending is expected to increase dramatically over 2022/2023 as confidence grows amongst the consumers to visit public places and to "make up for lost time" during the lockdown period. Over the medium term, the spend per head will continue to increase, albeit with the spend per head being marginally lower compared to the pre-pandemic levels.

<sup>15</sup> [Northern Ireland Executive, High Street Task Force Call for Evidence 2022](#)

<sup>16</sup> [Northern Ireland Executive, High Street Task Force, Delivering a 21st Century High Street, March 2022](#)

<sup>17</sup> Experian, Retail Planner Briefing Note 19, January 2022

Figure 3.11.1 Experian's Identified UK retail spending (including non-store) and leisure spending<sup>18</sup>

| Volume Growth Per Head (%)<br>Annual averages | 2021-30 | 2031-40 | 2021-40 | 1997-2007 | 2008-11 | 2012-20 | 1997-2020 |
|-----------------------------------------------|---------|---------|---------|-----------|---------|---------|-----------|
| Retail Spend                                  | 1.8     | 2.1     | 1.9     | 5.2       | 0.0     | 2.1     | 3.2       |
| Convenience goods                             | -0.1    | 0.1     | -0.2    | -0.6      | -2.8    | 0.5     | -0.6      |
| Comparison goods                              | 2.8     | 2.9     | 2.8     | 8.3       | 1.0     | 3.2     | 5.1       |
| of which bulky                                | 3.4     | 3.4     | 3.4     | 10/7      | 2.6     | 3.6     | 6.6       |
| Non-bulky                                     | 2.5     | 2.7     | 2.5     | 6.9       | 0.0     | 2.9     | 4.2       |
| Leisure                                       | 3.4     | 0.8     | 3.0     | -0.3      | -3.7    | -4.2    | -2.4      |
| Consumer spending                             | 1.8     | 1.4     | 1.7     | 2.8       | -1.0    | 0.0     | 1.1       |

Source: Figure 2 of Experian Retail Planner Briefing Note 19

## Online Shopping

- 3.12 The rise in internet retailing has been at the forefront of retail evolution for a number of years. Covid-19 has accelerated this trend.
- 3.13 Generally, Experian shows that growth in non-store retail is expected to be maintained, particularly through the wider adoption of commonplace technology such as mobile phones and tablets combined with 5G and fibre networks, faster delivery times and easier returns processes to make internet shopping even more convenient. Experian expects that the SFT market share will continue to grow strongly in the mid-term, whereby in 2025, 30% of retail expenditure would be spent online. The pace of e-commerce growth is anticipated to moderate over the longer term, reaching 36.5% of total retail sales by 2040<sup>19</sup>.

Figure 3.13.1 Experian's Identified and Forecast Market Share of Non-Retail Sales<sup>20</sup>

| Volume Growth Per Head (%) | 2022 | 2025 | 2030 | 2035 | 2040 |
|----------------------------|------|------|------|------|------|
| Total                      | 27.4 | 30.4 | 33.5 | 35.3 | 36.5 |
| Convenience goods          | 19.1 | 21.8 | 23.6 | 27.7 | 25.7 |
| Comparison goods           | 31.9 | 34.8 | 37.8 | 39.3 | 40.2 |

Source: Figure 5 of Experian Retail Planner Briefing Note 19

<sup>18</sup> Experian, Retail Planner Briefing Note 19, January 2022

<sup>19</sup> Experian, Retail Planner Briefing Note 19, January 2022

<sup>20</sup> Experian, Retail Planner Briefing Note 19, January 2022

## Omni-Channel Retail

- 3.14 The ongoing popularity of internet shopping continues to have clear implications in respect of the viability of some ‘bricks and mortar’ retailers. However, this does not mean that physical retail is to become obsolete.
- 3.15 Omni-channel retail (or omni-channel commerce) is increasingly becoming the norm across the industry. This is a multichannel approach to sales that focuses on providing a seamless customer experience whether the client is shopping online or in a brick-and-mortar store. For example, many stores sell online but fulfil orders from regular stores rather than warehouses<sup>21</sup>. Such purchases, therefore, help to sustain tangible retail floorspace.
- 3.16 The acceleration in consumer behaviour change in 2020 has made an omni-channel strategy more important than ever. In research conducted by BigCommerce and Retail Dive in 2020, 46% of retail executives said they planned to increase their investment in omni-channel retailing moving forward, a move away from their plans prior to COVID-19<sup>22</sup>.
- 3.17 When it comes to shopping in physical stores, 2021 research by Klarna<sup>23</sup> (an online shopping platform) highlights that physical retail is still an important channel even for digital-savvy shoppers: Shoppers are nearly twice as likely to value seeing and feeling items they’re buying in real life (88% Klarna shoppers); meanwhile, half (49%) of shoppers value being able to visit showrooms and see items in store, but pay online.

## Conclusion

- 3.18 The retail market has experienced significant changes in recent years and the prevailing retail environment continues to be somewhat unstable. In response to this unpredictability, those operating in the market are forced to adapt quickly or otherwise face falling profits.
- 3.19 In a market disrupted by continued changes in consumer behaviour, investing in the consumer experience is anticipated to be the key to success in securing resiliency in retail stores moving forward. Planning policy can play an important role in helping to future-proof city, town and village centres against the ongoing uncertainty.

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<sup>21</sup> This is particularly the case with food shopping and specialty comparison goods purchases, where retailers often try to tap into a wider market through an online presence

<sup>22</sup> [bigcommerce.co.uk](https://bigcommerce.co.uk)

<sup>23</sup> [Internet Retailing, 13 October 2021](#)

## 4. Market Shares and Capacity Assessment

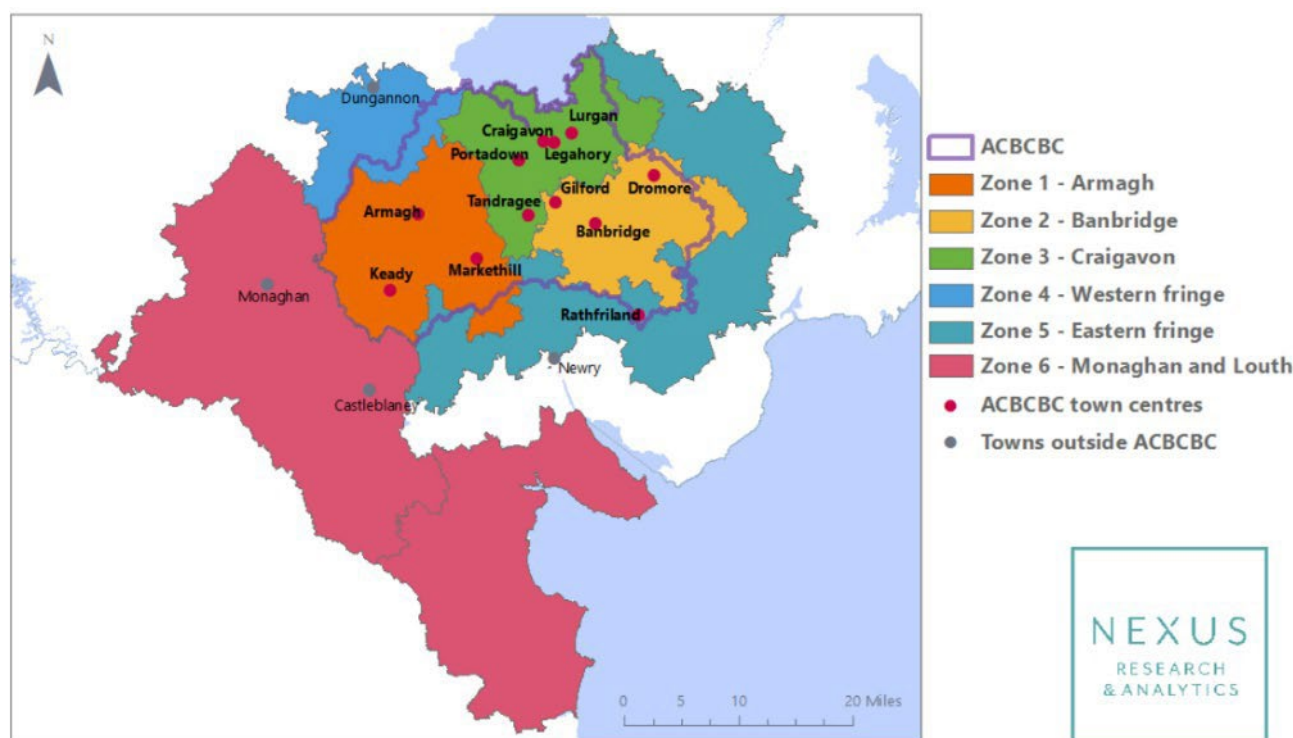
### Introduction

- 4.1 This section defines the Study Area and describes the Household Survey undertaken to inform this Study. It summarises the key findings on internet shopping patterns, as well as a survey-derived market share analysis for convenience and comparison goods spending at ‘bricks and mortar’ locations. We also examine the level of take-up for various leisure activities, and examine any locally identified deficiencies in provision.
- 4.2 As part of this analysis, we set out the results of our quantitative capacity assessment for new retail (comparison and convenience goods) and leisure floorspace in the Borough, covering the period from 2022 to 2035.

### Study Area & Household Telephone Surveys

- 4.3 It is important to identify a Study Area that covers the key area of interest. It is usually the area within which you would expect the resident population of the Borough to carry out the majority of its retail spending. The Study Area is shown on the plan in the figure below, and at **Appendix A**. The Study Area consist of five Zones (broadly aligning with the major conurbations in the Borough) and is defined by postal sector geography. For the purposes of the Study, Zones 1, 2 and 3 are referred to as the ‘Inner Study Area’, and broadly reflect the Borough boundary.

Figure 4.3.1 Study Area and Zone 6



Source: Appendix A

- 4.4 The Study Area is the subject of the main household telephone survey undertaken by NEMS Market Research. Household Surveys are widely recognised across the retail and leisure industry, and within planning policy guidance, as an excellent means of understanding where people within a specified area carry out their retail and leisure expenditure. The purpose of the Study Area Household Survey is to inform our quantitative analysis of the turnover of specific retailers, towns and

other destinations, as well as its qualitative findings on attitudes and perceptions of different centres. A number of additional questions were also asked about how people changed their shopping and leisure patterns as a result of Covid-19.

4.5 The Study Area Household Survey comprised 801 interviews split between the five Zones, and was based on population ratios in order to obtain accurate samples. A full description of the research methodology, sampling size, weightings and sample profiles is contained at the beginning of the NEMS report in **Appendix B**. NEMS quote their work as being within a 95% confidence range.

4.6 The figure below sets out the postcode sectors which comprise each Zone.

Figure 4.6.1 Study Area Postal Sectors and Number of Interviews

| Zone                    | Postal Sectors                                                                                                         | Household Survey Interviews |
|-------------------------|------------------------------------------------------------------------------------------------------------------------|-----------------------------|
| 1 Armagh                | BT60 1, BT60 2, BT60 3, BT60 4, BT61 7, BT61 8, BT61 9                                                                 | 201                         |
| 2 Banbridge             | BT25 1, BT25 2, BT32 3, BT32 4, BT32 5, BT63 6                                                                         | 200                         |
| 3 Craigavon             | BT62 1, BT62 2, BT62 3, BT62 4, BT63 5, BT64 1, BT64 2, BT64 3, BT65 4, BT65 5, BT66 6, BT66 7, BT66 8, BT67 9, BT67 0 | 200                         |
| 4 Western Fringe        | BT68 4, BT70 1, BT71 6, BT71 7                                                                                         | 100                         |
| 5 Eastern Fringe        | BT24 8, BT26 6, BT27 5, BT27 6, BT28 1, BT28 2, BT31 9, BT34 1, BT34 5, BT35 6, BT35 7, BT35 0                         | 100                         |
| <b>Study Area Total</b> |                                                                                                                        | <b>801</b>                  |

Source: Appendix B

4.7 The Study also assesses cross border shopping and leisure habits from County Monaghan & County Louth (Republic of Ireland). As such, a further Cross Border Household Telephone Survey has been carried out in relation to the two counties, referred to as Zone 6. A full description of the research methodology, sampling size, weightings and sample profiles is contained at the beginning of the NEMS report in **Appendix C**. Again, NEMS quote their work as being within a 95% confidence range.

4.8 The Cross Border Survey comprised 150 interviews split between the two Counties based on population ratio in order to obtain accurate samples. Zone 6 was based on County boundaries, rather than postcodes or eircodes.

Figure 4.8.1 Cross Border Survey and Number of Interviews

| County                  | Household Survey Interviews |
|-------------------------|-----------------------------|
| Monaghan                | 48                          |
| Louth                   | 102                         |
| <b>Study Area Total</b> | <b>150</b>                  |

Source: Appendix C

4.9 Overall, the Cross Border Survey has shown that the majority of residents of Zone 6 (55.3%) do not shop at destinations in Northern Ireland. Of those residents that do (44.7%), only 34.3% visit destinations in the Borough, with the most popular destination being Armagh CC (12.9%); Bridgewater Retail Park/ The Boulevard Outlet Shopping Park (6.2%), and Portadown TC (3.3%). We utilise these findings further in our assessment of capacity later on in this section.

## Study Area Population

- 4.10 The 2022 population for the Study Area by Zone (Zones 1 to 5) is sourced from Experian MMG3 data (2021 report). It is then projected forward using NISRA population forecasting (2018-based Population Projections for areas within Northern Ireland), whereby Zones 1, 2 and 3 have been projected using forecasts for Armagh City, Banbridge and Craigavon BC; Zone 4 has been projected using forecasts for Mid Ulster DC; and Zone 5 has been projected using combined forecasts for Newry, Mourne and Down DC and Lisburn and Castlereagh CC. We present the population projections on a Zone-by-Zone basis for the years 2022, 2025, 2030 and 2035 in the figure below.

Figure 4.10.1 Population Projections

| Zone                    | Population     |                |                |                | Population Growth |
|-------------------------|----------------|----------------|----------------|----------------|-------------------|
| Zone                    | 2022           | 2025           | 2030           | 2035           | 2022-2035         |
| 1 Armagh                | 52,006         | 53,162         | 54,820         | 56,306         | 8.3%              |
| 2 Banbridge             | 50,008         | 51,120         | 52,714         | 54,143         | 8.3%              |
| 3 Craigavon             | 125,905        | 128,705        | 132,717        | 136,316        | 8.3%              |
| 4 Western Fringe        | 35,557         | 36,236         | 37,172         | 37,973         | 6.8%              |
| 5 Eastern Fringe        | 109,230        | 110,799        | 112,859        | 114,468        | 4.8%              |
| <b>Total Study Area</b> | <b>372,706</b> | <b>380,023</b> | <b>390,281</b> | <b>399,206</b> | <b>7.1%</b>       |

Source: Appendix D

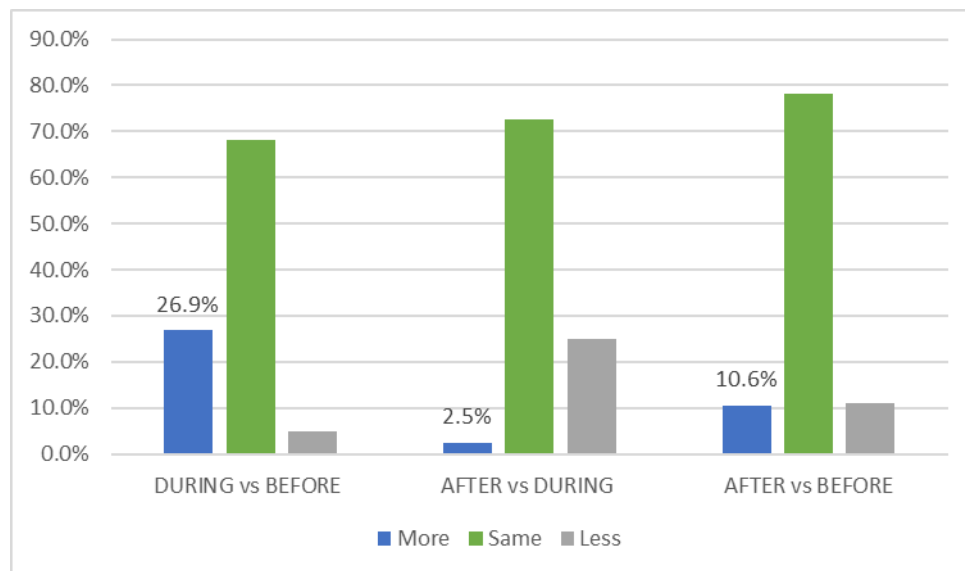
## Non-Store Retailing or Special Forms of Trading

- 4.11 Special forms of trading (SFT) are defined by Experian as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies. For the reasons we have set out in Section 3, it is vital to take account of the proportion of spending which is carried out in these sectors, as it has a significant impact on the capacity for existing and proposed 'bricks and mortar' floorspace.

### Convenience Goods Online Shopping

- 4.12 The household survey asked residents of the Study Area where they normally undertake their main food and grocery shopping.
- 4.13 Across the whole Study Area, 7.0% of respondents usually shop online for their main food shop (Question 1 of the Household Survey). As set out in Section 3, the UK average for online convenience shopping in 2022 is 19.1%. As such, the take-up of online convenience shopping in the Study Area is considerably lower than the UK average, though based on our experience elsewhere, this is not an uncommon finding in Northern Ireland. Question 2 of the Household Survey shows that the online convenience goods trade which is carried out across the Study Area is dominated by Tesco (57.4%) and Asda (26.4%).
- 4.14 The household survey also asked residents of the Study Area about how their online convenience shopping habits have been affected by Covid-19 lockdowns. The figure below shows that Covid-19, and in particular the lockdowns, has resulted in a lasting habitual change in the Study Area, whereby the overall preference for online groceries shopping has increased.

Figure 4.14.1 Change in online convenience shopping habits as a result of Covid-19 lockdowns

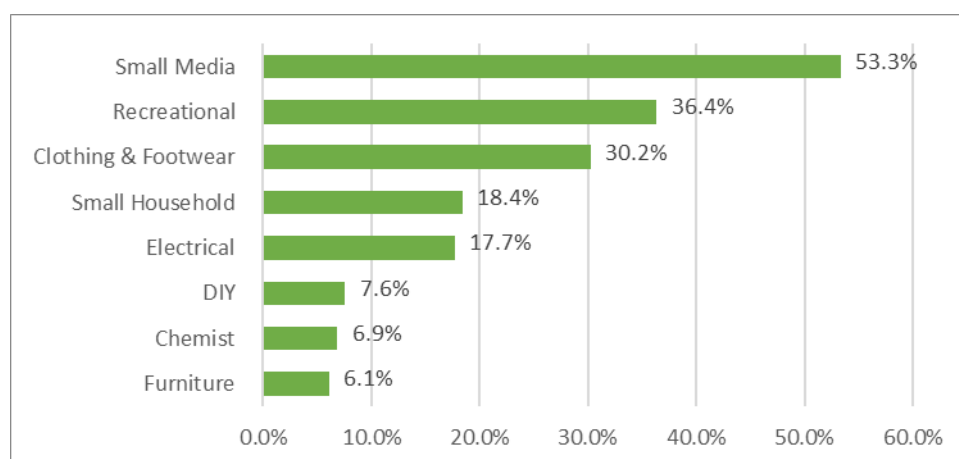


Source: Appendix B

### Comparison Goods Online Shopping

4.15 The household survey asked where respondents usually shop for different types of comparison goods. The findings presented in the figure below, show that the take-up for online shopping varies across the categories from 6.1% (furniture) to 53.3% (small media). On average, within the Study Area, 22.1% of respondents shop online for comparison goods, compared to a UK average of 31.9%. There is therefore a significantly lower propensity to shop for comparison goods online in the Study Area, than across the UK as a whole.

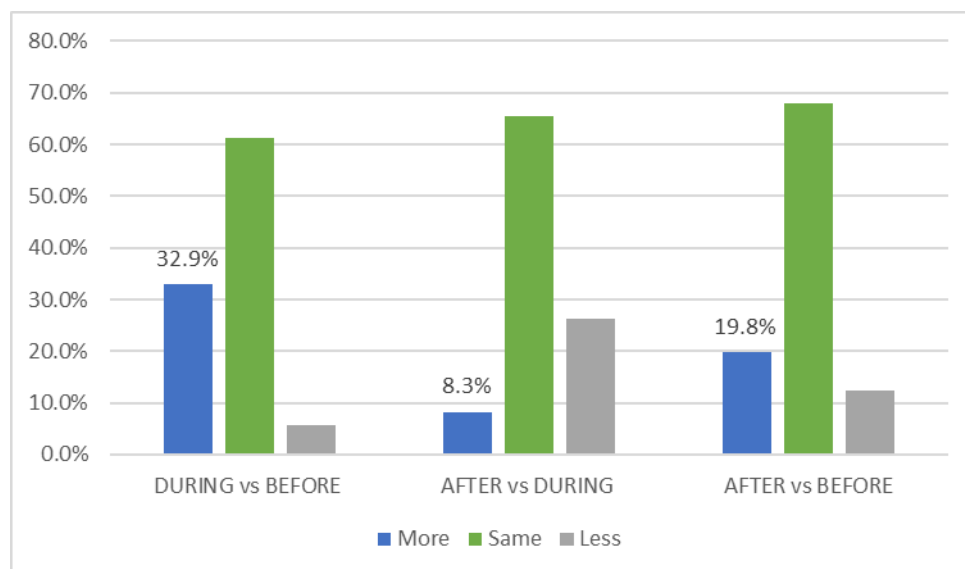
Figure 4.15.1 Online Comparison Goods Spending in the Study Area



Source: Appendix D

- 4.16 The household survey also asked residents of the Study Area about how their online comparison shopping habits have been affected by Covid-19. The figure below shows that Covid 19 had resulted in a lasting habitual change in the Study Area, whereby the overall preference for online groceries shopping has increased.

Figure 4.16.1 Change in online comparison shopping habits as a result of Covid-19 lockdowns



Source: Appendix B

## Retail Expenditure Forecasts

- 4.17 Retail expenditure data has been sourced from our in-house Experian MicroMarketer G3 system. We obtain separate data for convenience and comparison goods, which in turn is broken down into multiple goods categories, as set out in our full statistical assessment in **Appendix D**.
- 4.18 The data takes account of the socio-economic characteristics of the local population to provide local consumer expenditure calculations. Experian is a robust source of population and expenditure data that is widely used for calculating retail capacity across the industry.
- 4.19 Expenditure data from Experian is provided per capita in 2020 prices, as is every subsequent monetary value. Using the growth rates presented in Table 6 of Experian Retail Planner Briefing Note 19 (January 2022), which are reproduced in the table below, the per capita expenditure is then projected forward to the base year (2022) and the relevant assessment years. Adjustments are made at every step to account for the growth in special forms of trading (SFT).
- 4.20 There are two elements that should be noted here:
- Experian notes that long-term forecasts should be treated with caution, and that they should be subject to regular reviews given the wide range of factors that can influence the broader national economy. Experian produces annual updates to reflect this, and as we go on to discuss in our recommendations later in the report, we would advise that some of the expenditure data inputs to this report be re-visited in another 12 -24 months in recognition of the exceptionally turbulent economic times surrounding both Covid-19 and Brexit, the full implications of which have yet to be realised at the time of writing.

- b. Special forms of trading (SFT) are defined by Experian as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies. As we have mentioned previously, Experian Retail Planner Briefing Note 19 (January 2022) provides estimated year-on-year forecasts of internet and other SFT, which allows us to 'strip out' any expenditure that is, either now or in the future, diverted to SFT. This ensures that the increasing propensity to shop by SFT is accounted for in our modelling. These increasing deductions for SFT have the effect of off-setting some of the growth in expenditure in the Study Area derived from population increases. Furthermore, many brands offer online sales, but source the goods from their own stores' shelves. This is often the case for food stores where employees will pick online orders from stores' shelves before, during or after opening hours. These orders are then delivered by dedicated vans from each store and as such, the online expenditure is attributed to tangible stores. Experian provides 'adjusted' figures to account for this.

Figure 4.20.1 'Adjusted' Special Forms of Trading Market Share Forecasts

| Year | Convenience growth rates (%) | Comparison growth rates (%) |
|------|------------------------------|-----------------------------|
| 2021 | -4.6                         | 0.5                         |
| 2022 | -1.4                         | 5.9                         |
| 2023 | -0.2                         | 1.8                         |
| 2024 | -0.2                         | 1.8                         |
| 2025 | -0.1                         | 1.9                         |
| 2026 | -0.1                         | 2.0                         |
| 2027 | -0.1                         | 2.1                         |
| 2028 | 0                            | 2.3                         |
| 2029 | 0                            | 2.4                         |
| 2030 | 0                            | 2.4                         |
| 2031 | 0.1                          | 2.5                         |
| 2032 | 0.1                          | 2.6                         |
| 2033 | 0.1                          | 2.6                         |
| 2034 | 0.1                          | 2.6                         |
| 2035 | 0.1                          | 2.7                         |

Source: Figure 6, Experian Retail Planner Briefing Note 19, January 2022

- 4.21 The expenditure per capita figures are then multiplied by the population of each zone at each of the assessment years. The figure below sets out the resultant outcome of the total 'brick and mortar' comparison and convenience expenditure in the Study Area at the base and assessment years.

Figure 4.21.1 Retail Expenditure Forecasts in the Study Area (£m)

|             | 2022     | 2025     | 2030     | 2035     | Growth 2022-2035 |
|-------------|----------|----------|----------|----------|------------------|
| Convenience | £949.9   | £963.6   | £987.6   | £1,015.2 | 6.9%             |
| Comparison  | £1,232.4 | £1,327.0 | £1,522.3 | £1,770.2 | 43.6%            |

Source: Tables 1b & 7b, Appendix D

## Convenience Goods Findings

### Market Shares

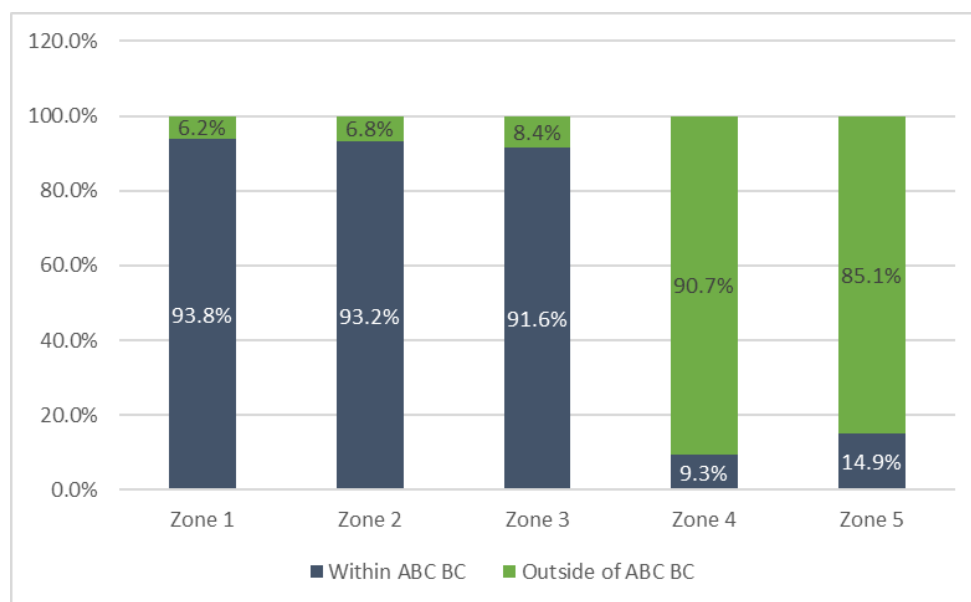
- 4.22 Before considering the capacity for new convenience goods floorspace, we firstly examine the overall convenience goods spending by residents of the Study Area. The table below shows where Study Area residents are spending their money.
- 4.23 The results show that destinations in the Borough account for 61.8% (£587.0 m) of the spending of all Study Area residents in 2022 (this is known as 'retention'). The remaining 38.2% (£362.9 m) of spending carried out by residents of the Study Area takes place at destinations beyond the Borough (this is known as 'leakage').

Figure 4.23.1 Convenience Goods Market Share by Destination

| Destination       | Total Convenience (%) | Total Convenience (£m) | Inner Study Area (Zone 1 -3) (%) | Inner Study Area (Zone 1 -3) (£m) |
|-------------------|-----------------------|------------------------|----------------------------------|-----------------------------------|
| Within ABC BC     | 61.8%                 | £587.0                 | 92.4%                            | £536.6                            |
| In-Centre         | 34.3%                 | £325.9                 | 53.4%                            | £309.7                            |
| Armagh CC         | 7.5%                  | £71.6                  | 11.3%                            | £65.5                             |
| Banbridge TC      | 2.9%                  | £28.0                  | 4.8%                             | £28.0                             |
| Craigavon TC      | 5.3%                  | £50.7                  | 8.7%                             | £50.4                             |
| Dromore LTC       | 0.1%                  | £1.2                   | 0.2%                             | £1.2                              |
| Gilford LTC       | 0.1%                  | £0.6                   | 0.1%                             | £0.6                              |
| Keady LTC         | 0.6%                  | £5.3                   | 0.9%                             | £5.3                              |
| Lurgan TC         | 9.9%                  | £94.1                  | 16.2%                            | £94.1                             |
| Markethill LTC    | 1.1%                  | £10.4                  | 1.2%                             | £6.9                              |
| Portadown TC      | 5.7%                  | £54.0                  | 9.2%                             | £53.6                             |
| Rathfriland LTC   | 0.6%                  | £6.0                   | 0.0%                             | £0.0                              |
| Tandragee LTC     | 0.4%                  | £4.0                   | 0.7%                             | £4.0                              |
| Out of Centre     | 27.5%                 | £261.1                 | 39.1%                            | £226.9                            |
| OoC - Armagh      | 0.7%                  | £6.3                   | 1.1%                             | £6.3                              |
| OoC - Banbridge   | 10.6%                 | £100.3                 | 14.4%                            | £83.4                             |
| OoC - Craigavon   | 1.1%                  | £10.3                  | 1.8%                             | £10.3                             |
| OoC - Dromore     | 1.1%                  | £10.3                  | 1.7%                             | £9.7                              |
| OoC - Keady       | 0.5%                  | £4.4                   | 0.8%                             | £4.4                              |
| OoC - Lurgan      | 3.2%                  | £29.9                  | 5.2%                             | £29.9                             |
| OoC - Portadown   | 5.9%                  | £56.3                  | 9.6%                             | £56.0                             |
| OoC - Rathfriland | 1.3%                  | £12.8                  | 0.2%                             | £1.0                              |
| OoC - Other       | 3.2%                  | £30.4                  | 4.4%                             | £25.8                             |
| Outside of ABC BC | 38.2%                 | £362.9                 | 7.6%                             | £43.9                             |
| Newry             | 12.9%                 | £122.3                 | 0.8%                             | £4.9                              |
| Lisburn           | 9.7%                  | £91.9                  | 3.6%                             | £20.7                             |
| Dungannon         | 6.8%                  | £64.1                  | 0.2%                             | £1.0                              |
| Other             | 8.9%                  | £84.6                  | 0.0%                             | £0.0                              |
| Total             | 100.0%                | £949.9                 | 100.0%                           | £580.4                            |

- 4.24 Looking at the Inner Study Area in isolation (Zones 1 to 3 only), 92.4% (£536.6 m) of expenditure is retained by the Borough; with only 7.6% (£43.9 m) spent outside of the Borough. 53.4% of expenditure in the Inner Study Area goes to the town centres in the Borough, whereby Lurgan has the strongest pull, followed by Armagh. Out-of-centre destinations draw 39.1% of expenditure in the Inner Study Area, with out of centre stores in Banbridge having the strongest pull, followed by out of centre stores in Portadown.
- 4.25 These figures show that the Borough provides well for its own residents population in terms of convenience goods spending. A retention figure of 92.4% is a health indicator.
- 4.26 Based on the Inner Study Area market shares, the most popular standalone foodstores within the Borough are Tesco Millennium Way in Lurgan Town Centre (13.7% market share); Tesco, Bridgewater Retail Park in out of centre Banbridge (7.0%); Tesco, Marlborough Retail Park in Craigavon Town Centre (6.8%), Tesco, Castlewellan Road in out of centre Banbridge (6.2%) and Tesco, The Meadows Shopping Centre in Portadown Town Centre (5.8%).
- 4.27 Importantly, we can also examine the destination of convenience goods spend within each Zone of the Study Area. The graph below examines the amount of convenience goods spending carried out inside the Borough by residents of each Zone. The results show that there are very healthy levels of retention in Zones 1, 2, and 3 (Inner Study Area). Each Zone in its own right 'retains' in excess of 91% of its residents' convenience goods spending, and so there are no obvious issues with trade 'leakage' at the local level either.
- 4.28 Turning then to consider the flows of trade from Zones 4 and 5, it is notable that there is relatively little 'inflow' to the Borough. This is unsurprising given the geographical location of these Zones: residents in Zone 4 favour Dungannon, and residents in Zone 5 favour Newry and Lisburn.

Figure 4.28.1 Convenience Goods Market Share by Zone



Source: Appendix C

- 4.29 Turning to individual retail destinations, where national company averages are available for benchmarking purposes, we are able to compare local turnover to the turnover of an average store of that size in order to identify where facilities may be trading over or below expectations. This is summarised at the table below including assumptions for the inflow of trade.

Figure 4.29.1 Convenience Goods Turnover Benchmarking

| Destination       | Benchmark Turnover (£m) | With 2% Inflow from Beyond Study Area (£m) | Trading Position against Benchmark (£m) | Trading Position against Benchmark (%) |
|-------------------|-------------------------|--------------------------------------------|-----------------------------------------|----------------------------------------|
| Within ABC BC     | 634.0                   | 598.8                                      | -35.2                                   | -5.6%                                  |
| In-Centre         | 323.9                   | 332.4                                      | 8.5                                     | 2.6%                                   |
| Armagh CC         | 67.9                    | 73.0                                       | 5.1                                     | 7.5%                                   |
| Banbridge TC      | 31.0                    | 28.6                                       | -2.4                                    | -7.9%                                  |
| Craigavon TC      | 73.6                    | 51.7                                       | -21.9                                   | -29.7%                                 |
| Dromore LTC       | 1.2                     | 1.2                                        | 0.0                                     | 2.0%                                   |
| Gilford LTC       | 0.6                     | 0.6                                        | 0.0                                     | 2.0%                                   |
| Keady LTC         | 5.3                     | 5.4                                        | 0.1                                     | 2.0%                                   |
| Lurgan TC         | 57.2                    | 96.0                                       | 38.8                                    | 67.8%                                  |
| Markethill LTC    | 10.4                    | 10.6                                       | 0.2                                     | 2.0%                                   |
| Portadown TC      | 66.7                    | 55.0                                       | -11.6                                   | -17.5%                                 |
| Rathfriland LTC   | 6.0                     | 6.1                                        | 0.1                                     | 2.0%                                   |
| Tandragee LTC     | 4.0                     | 4.1                                        | 0.1                                     | 2.0%                                   |
| Out of Centre     | 310.0                   | 266.3                                      | -43.7                                   | -14.1%                                 |
| OoC - Armagh      | 6.3                     | 6.4                                        | 0.1                                     | 2.0%                                   |
| OoC - Banbridge   | 131.4                   | 102.3                                      | -29.1                                   | -22.2%                                 |
| OoC - Craigavon   | 10.1                    | 10.5                                       | 0.4                                     | 4.1%                                   |
| OoC - Dromore     | 10.3                    | 10.5                                       | 0.2                                     | 2.0%                                   |
| OoC - Keady       | 4.4                     | 4.5                                        | 0.1                                     | 2.0%                                   |
| OoC - Lurgan      | 27.2                    | 30.5                                       | 3.3                                     | 12.1%                                  |
| OoC - Portadown   | 77.0                    | 57.4                                       | -19.6                                   | -25.4%                                 |
| OoC - Rathfriland | 12.8                    | 13.1                                       | 0.3                                     | 2.0%                                   |
| OoC - Other       | 30.4                    | 31.0                                       | 0.6                                     | 2.0%                                   |

Source: Table 4, Appendix D

- 4.30 The results show that the convenience floorspace in the Borough is, on average, performing below benchmark when considered cumulatively. Facilities in the Borough are trading at an average of 5.6% below benchmark.
- 4.31 Cumulatively the centres in the Borough perform reasonably well, 2.6% above benchmark – however this average is ‘pushed up’ significantly by Lurgan Town Centre with 67.8% above benchmark; and is ‘pulled down’ by Craigavon Town Centre (29.7% below benchmark) and Portadown Town Centre (17.5% below benchmark) and to a lesser extent Banbridge Town Centre (7.9% below benchmark).
- 4.32 Out of centre destinations are performing below benchmark when considered cumulatively. However, this is driven by the weak performance of out of centre stores in Banbridge and Portadown. We summarise below the performance of individual stores in the Borough below. The table below sets out the best and worst performing stores.

Figure 4.32.1 Best and Worst Performance Benchmarking – Convenience Goods

| Destination                                       | Benchmark Turnover (£m) | With 2% Inflow from Beyond Study Area (£m) | Trading Position against Benchmark (£m) |
|---------------------------------------------------|-------------------------|--------------------------------------------|-----------------------------------------|
| <b>Best Performing</b>                            |                         |                                            |                                         |
| Tesco, Millennium Way (Lurgan TC)                 | 42.8                    | 81.3                                       | 38.5                                    |
| Lidl, Spires Retail Park (Armagh CC)              | 7.6                     | 15.9                                       | 8.3                                     |
| Lidl, Pinehurst Retail Park (Lurgan OoC)          | 13.1                    | 16.1                                       | 3.0                                     |
| Tesco, Castlewellan Road (Banbridge OoC)          | 44.0                    | 45.1                                       | 1.1                                     |
| <b>Worst Performing</b>                           |                         |                                            |                                         |
| Tesco, Marlborough Retail Park (Craigavon TC)     | 62.3                    | 40.2                                       | -22.1                                   |
| Asda, Bridge Street (Portadown OoC)               | 48.1                    | 28.0                                       | -20.1                                   |
| Tesco, Bridgewater Retail Park (Banbridge OoC)    | 69.8                    | 50.5                                       | -19.3                                   |
| Tesco, The Meadows Shopping Centre (Portadown TC) | 46.2                    | 34.6                                       | -11.6                                   |
| M&S, Bridgewater Retail Park (Banbridge OoC)      | 13.1                    | 2.0                                        | -11.1                                   |
| Sainsbury, The Mall Shopping Centre (Armagh CC)   | 27.1                    | 23.2                                       | -3.8                                    |
| Lidl, Newry Road (Banbridge TC)                   | 20.4                    | 17.7                                       | -2.7                                    |
| Lidl, High Street Mall (Portadown TC)             | 13.9                    | 13.7                                       | -0.2                                    |

Source: Table 4, Appendix D

### Convenience Goods Capacity

- 4.33 One of the key aims of this Study is to provide recommendations on the capacity for new retail floorspace over the plan period to 2035. The use of long-term projections should be treated with caution and reviewed regularly in order to test the accuracy of the forecasts against emerging datasets. External, national and international factors can influence the wider performance of the economy, which can have trickle down effects on local shopping patterns. As discussed in Section 3, one such example has been the economic implications of the United Kingdom leaving the European Union and the social distancing and lockdown measures necessitated by the current Covid-19 pandemic, as well the war in Ukraine.
- 4.34 Importantly, we also note that any quantitative retail capacity that we may identify across the Study Area does not necessarily equate to justification for new retail floorspace in itself (especially in out-of-centre locations), and any such development would be required to be assessed in line with SPPS policy in terms of impacts on the vitality and viability of town centres, the potential to prejudice emerging town centre developments, and the ‘town centre first’ sequential approach to site selection. Equally, the converse also applies and a lack of identified capacity should not specifically rule out retail developments, where other material factors support such development.
- 4.35 Detailed quantitative retail capacity tables are enclosed at **Appendix D**.
- 4.36 Retail capacity modelling follows a consistent, robust methodology which incorporates a number of datasets and informed assumptions which we describe further below, but broadly speaking:

Available Expenditure (£m) - Turnover of Existing & Proposed (£m) = Surplus or Deficit (£m)

- 4.37 Experian MMG3 census software is used to provide localised expenditure per capita per annum for various forms of retail spending. These figures are then projected forwards based on population growth, changes in expenditure over time and Special Forms of Trading (SFT), such as internet shopping.
- 4.38 The turnover of existing retailers across the Study Area is calculated based on average sales densities, or turnover, per square metre. Various retail planning sources provide average (or benchmark) sales densities for all national multiple retailers.
- 4.39 The surplus or deficit equates to the difference between the available retail expenditure across the Study Area and the turnover of existing facilities within the Study Area. If the total turnover is greater than the available expenditure, then the model would identify an oversupply of existing retail floorspace, whilst a surplus of expenditure would suggest capacity for additional retail floorspace.
- 4.40 Once the surplus or deficit of expenditure is calculated, it is then presented in floorspace figures (using average sales density assumptions) in order to demonstrate the findings within a 'real world' context. Often, surplus figures are presented under a number of different scenarios representing various retailers. For example, discount retailers (such as Aldi and Lidl amongst others) continue to operate at a lower sales density than the 'big 4' (Sainsbury's, Tesco, Asda, and Morrisons). Given the same available 'pot of expenditure', a higher sales density would result in a lower floorspace capacity than a lower sales density, which would result in a higher floorspace capacity.
- 4.41 Turning now to our detailed findings for the Borough, as detailed in Figure 4.23.1 above, the household survey results show that facilities within the Borough have a 61.8% convenience goods market share of all spending carried out by residents of this Study Area.
- 4.42 In keeping with standard retail study methodology, when assessing the capacity for new convenience retail floorspace, we adopt a constant market share, in line with findings of the latest household survey (i.e. that stores within the Borough will continue to draw 61.8% of all convenience goods spending from the Study Area). We consider that maintaining a constant market share provides a sensible basis for analysis given the relative lack of planned developments across the Study Area. In coming to this view, we have analysed the level of commitments identified through correspondence with Council officers in both the Borough and neighbouring planning authorities.
- 4.43 Based on a constant market share, we then allow for growth in retail expenditure over the period to 2035, as well as utilising data provided within the latest Experian Retail Planner Briefing Note 19, in order to take account of forecast growth in retail efficiencies (for example, through the adoption of new technologies and more efficient use of available floorspace). Floorspace efficiencies are estimated to have a greater impact on comparison retailers than convenience retailers over the plan period as the rise of food discounting and disruptions to logistics continue to subdue projected efficiencies in turnover of existing convenience retail floorspace.
- 4.44 We go on to make a number of statistical assumptions through the quantitative capacity exercise in order to account for the following variables. These are contained at Tables 5a-5c of Appendix D and can be summarised as:
- a. Utilising a 'goods based' approach, we strip out expenditure for non-food comparison goods such as clothing, household goods, CDs, DVDs and other media that are now commonly sold at major foodstores so that only the convenience goods floorspace is being considered (i.e. on a like-for-like basis with available convenience expenditure). These deductions are made in line with floorspace figures sourced from publicly available databases or, where data is not available, Nexus' professional judgement based on site visits.

- b. We also make assumptions as to the gross to net convenience goods sales floorspace of each store, again utilising online planning records where available, national rates databases or Nexus' professional judgement.
- c. Finally, we consider whether foodstores are likely to attract any additional 'inflow' from outside of the Study Area. In this instance, we have included an assumption that all stores in the Borough will experience a 2% inflow from beyond the Study Area, based on the results of the NEMS survey and our professional judgement.

4.45 We then go on to calculate the anticipated turnover of all major convenience goods operators based on the published company sales data, referred to as 'benchmark' turnover. 'Benchmark' turnover is calculated from national average 'sales densities' (turnover per square metre). By comparing the turnover estimates derived from the findings of the household survey (total available expenditure distributed on the basis of each destinations market share) to the benchmark turnovers, we are able to establish where stores are trading above (overtrading) or below (under-trading) company averages.

4.46 Based on the household survey, the Borough's convenience retailers' turnover is estimated to be £598.7m at 2022. This is projected to increase to £607.4m in 2025, £622.5m in 2030, and £639.9m in 2035 (see Table 5b of Appendix D). This represents a 6.9% growth – the limited growth is a factor of the growth rates forecast by Experian (which flat-line for convenience goods in the medium-term).

4.47 Set against these expenditure forecasts, we deduct for extant convenience goods commitments. These are set out at Table 5d of Appendix D. This includes any developments that have not been built, are currently under construction, or have opened or would not have been operating at the time of the household survey. We do not take into account proposed allocations for retail floorspace, but consider development proposals for which a formal planning application has been approved.

4.48 Having deducted for extant commitments, we then contrast the pots of available convenience goods expenditure with the benchmark performance of existing facilities at each date. The table below sets out the resultant surplus convenience goods expenditure at each assessment date.

Figure 4.48.1 Gross Convenience Goods Surplus Expenditure in the Borough

|      | Survey Derived (with Inflow) Turnover of all Floorspace (£m): | Total Forecast "Benchmark" Turnover of all Floorspace (£m) | Available Expenditure before commitments (£m) | Turnover of all committed floorspace (£m) | Surplus Expenditure (£m) |
|------|---------------------------------------------------------------|------------------------------------------------------------|-----------------------------------------------|-------------------------------------------|--------------------------|
| 2025 | £607.4                                                        | £645.4                                                     | -£38.0                                        | £37.8                                     | -£75.7                   |
| 2030 | £622.5                                                        | £647.3                                                     | -£24.8                                        | £37.9                                     | -£62.7                   |
| 2035 | £639.9                                                        | £647.3                                                     | -£7.4                                         | £37.9                                     | -£45.3                   |

Source: Table 6a, Appendix D

4.49 Using average sales densities to calculate a minimum floorspace scenario (a large supermarket operator) and a maximum floorspace scenario (a combination of discount foodstores operators), we go on to calculate the net additional convenience goods capacity for the Borough – see the figure below. Overall, there is negative capacity for convenience floorspace, whereby the quantitative capacity for the Borough as a whole is calculated to be between -4,490 sq m and -3,301 sq m net in 2035.

Figure 4.49.1 Net quantitative 'capacity' for new convenience goods in the Borough

|      | Surplus Expenditure (£m) | Total Capacity in the Borough (sq m net) |    |        |
|------|--------------------------|------------------------------------------|----|--------|
| 2025 | -£75.7                   | -7,533                                   | to | -5,539 |
| 2030 | -£62.7                   | -6,214                                   | to | -4,569 |
| 2035 | -£45.3                   | -4,490                                   | to | -3,301 |

Source: Table 6a, Appendix D

**4.50** We have then examined how this capacity might divide among the areas of the Borough, based on existing market shares. This assessment is set out at Tables 6b-6g at Appendix D, and is summarised in the figure below. This shows that there is actually quantitative capacity for between 2,992 sq m net and 4,069 sq m net in Lurgan Built-Up Area. This is however outweighed by the negative capacity in Banbridge, Craigavon and Portadown Built-Up Areas.

Figure 4.50.1 Net quantitative 'capacity' for new convenience goods

| Year | Armagh Built-Up Area    |    |        |
|------|-------------------------|----|--------|
| 2025 | 156                     | to | 213    |
| 2030 | 285                     | to | 388    |
| 2035 | 453                     | to | 616    |
| Year | Banbridge Built-Up Area |    |        |
| 2025 | -4,041                  | to | -2,972 |
| 2030 | -3,753                  | to | -2,760 |
| 2035 | -3,376                  | to | -2,483 |
| Year | Craigavon Built-Up Area |    |        |
| 2025 | -2,194                  | to | -1,613 |
| 2030 | -2,057                  | to | -1,512 |
| 2035 | -1,878                  | to | -1,381 |
| Year | Lurgan Built-Up Area    |    |        |
| 2025 | 2,519                   | to | 3,426  |
| 2030 | 2,724                   | to | 3,704  |
| 2035 | 2,992                   | to | 4,069  |
| Year | Portadown Built-Up Area |    |        |
| 2025 | -3,200                  | to | -2,353 |
| 2030 | -2,952                  | to | -2,171 |
| 2035 | -2,628                  | to | -1,932 |
| Year | Other Areas in ABC BC   |    |        |
| 2025 | 105                     | to | 142    |
| 2030 | 246                     | to | 334    |
| 2035 | 430                     | to | 585    |

Source: Table 6b to 6g, Appendix D

**4.51** We examine the opportunities for growth in more detail in Section 19.

## Comparison Goods Findings

### Market Shares

- 4.52 Turning to consider comparison goods, we examine market shares across the range of categories defined by Experian. These eight categories cover all ranges of bulky and non-bulky items. The full results of our market shares analysis are set out in Tables 7-18 of **Appendix D**.
- 4.53 To begin with, we look at the overall comparison goods spend by residents across the Study Area. The results show that destinations in the Borough account for 54.7% (£674.2m) of the spending of all Study Area residents in 2022. The spending is predominantly split between the various designated centres (48.9%) and destinations beyond the Borough (45.3%), with out-of-centre locations having a very marginal draw (5.8%). This low level of out-of-centre comparison goods spend is a real feature of the results. It is significantly lower than in many other parts of Northern Ireland, and especially when considered against the UK as a whole.
- 4.54 Looking at the Inner Study Area in isolation, which broadly equates to the Borough boundary (Zone 1, 2 and 3), destinations in the Borough account for 77.9% of the spending of Inner Study Area residents in 2022. The majority of this spending is carried out in designated centres (70.8%), with Craigavon Town Centre having the strongest draw (23.4%), followed by Portadown Town Centre (13.1%), Armagh City Centre (10.8%), Banbridge Town Centre (10.0%) and Lurgan Town Centre (9.4%). Out-of-centre locations draw 7.1%, with the biggest attraction being the Boulevard Outlet Shopping Park. The remaining 22.1% of spending is carried out at destinations beyond the Borough, with the most popular locations being Lisburn (8.5%), Belfast (6.7%) and Newry (4.4%).

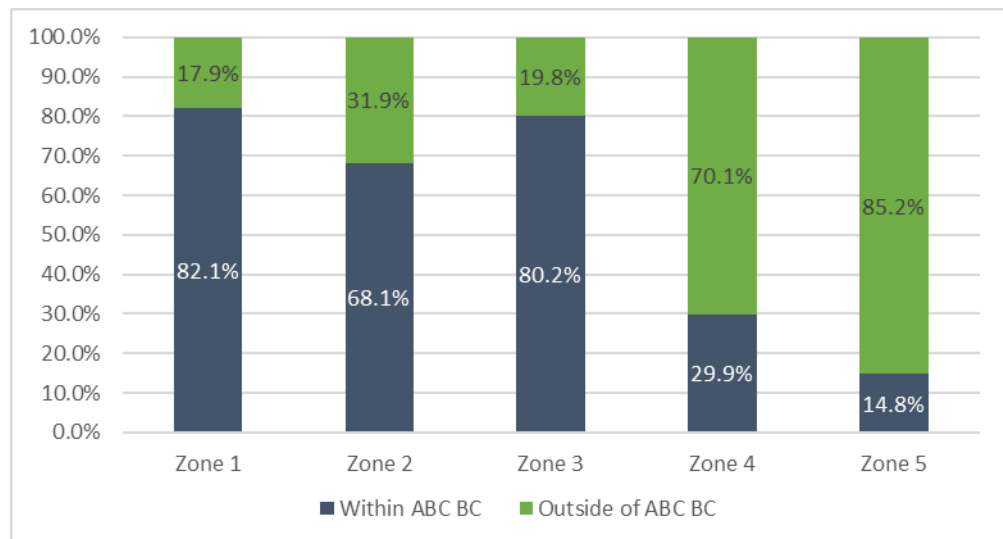
Figure 4.55.1 - Comparison Goods Market Share from the Study Area, by Destination

| Destination                         | Total (£m)    | Total (%)     | Inner Study Area (£m) | Inner Study Area (%) |
|-------------------------------------|---------------|---------------|-----------------------|----------------------|
| <b>Within ABC BC</b>                | <b>674.2</b>  | <b>54.7%</b>  | <b>587.9</b>          | <b>77.9%</b>         |
| <b>In-Centre</b>                    | <b>602.3</b>  | <b>48.9%</b>  | <b>534.3</b>          | <b>70.8%</b>         |
| Armagh CC                           | 93.6          | 7.6%          | 81.7                  | 10.8%                |
| Banbridge TC                        | 90.1          | 7.3%          | 75.4                  | 10.0%                |
| Craigavon TC                        | 191.8         | 15.6%         | 176.4                 | 23.4%                |
| Dromore LTC                         | 3.7           | 0.3%          | 3.6                   | 0.5%                 |
| Gilford LTC                         | 0.0           | 0.0%          | 0.0                   | 0.0%                 |
| Keady LTC                           | 8.8           | 0.7%          | 8.6                   | 1.1%                 |
| Legahory DC                         | 0.0           | 0.0%          | 0.0                   | 0.0%                 |
| Lurgan TC                           | 72.9          | 5.9%          | 71.0                  | 9.4%                 |
| Markethill LTC                      | 16.3          | 1.3%          | 13.2                  | 1.7%                 |
| Portadown TC                        | 102.9         | 8.3%          | 99.1                  | 13.1%                |
| Rathfriland LTC                     | 17.9          | 1.4%          | 0.9                   | 0.1%                 |
| Tandragee LTC                       | 4.4           | 0.4%          | 4.4                   | 0.6%                 |
| <b>Out of Centre</b>                | <b>71.9</b>   | <b>5.8%</b>   | <b>53.6</b>           | <b>7.1%</b>          |
| OoC - Armagh                        | 0.2           | 0.0%          | 0.2                   | 0.0%                 |
| OoC – Banbridge                     | 53.5          | 4.3%          | 36.2                  | 4.8%                 |
| OoC - Craigavon                     | 0.0           | 0.0%          | 0.0                   | 0.0%                 |
| OoC - Dromore                       | 0.1           | 0.0%          | 0.1                   | 0.0%                 |
| OoC - Lurgan                        | 1.3           | 0.1%          | 1.3                   | 0.2%                 |
| OoC - Portadown                     | 10.2          | 0.8%          | 9.9                   | 1.3%                 |
| OoC - Other                         | 6.7           | 0.5%          | 5.9                   | 0.8%                 |
| <b>Outside of ABC BC</b>            | <b>558.2</b>  | <b>45.3%</b>  | <b>167.1</b>          | <b>22.1%</b>         |
| Belfast                             | 88.9          | 7.2%          | 50.7                  | 6.7%                 |
| Dungannon                           | 48.2          | 3.9%          | 3.6                   | 0.5%                 |
| Lisburn                             | 165.3         | 13.4%         | 64.3                  | 8.5%                 |
| London                              | 0.6           | 0.1%          | 0.6                   | 0.1%                 |
| Newcastle                           | 3.9           | 0.3%          | 1.9                   | 0.3%                 |
| Newry                               | 199.1         | 16.2%         | 33.1                  | 4.4%                 |
| Other Locations in Northern Ireland | 44.5          | 3.6%          | 10.5                  | 1.4%                 |
| Republic of Ireland                 | 7.7           | 0.6%          | 2.6                   | 0.3%                 |
| <b>Total</b>                        | <b>1232.4</b> | <b>100.0%</b> | <b>755.1</b>          | <b>100.0%</b>        |

Source: Table 16, Appendix D

4.55 As with our previous assessment of convenience goods, we are also able to examine the degree of comparison goods spend within each Zone. The figure below examines the amount of comparison goods spending carried out inside the Borough by residents of the Study Area by Zone.

Figure 4.56.1 Comparison Goods Market Share by Zone

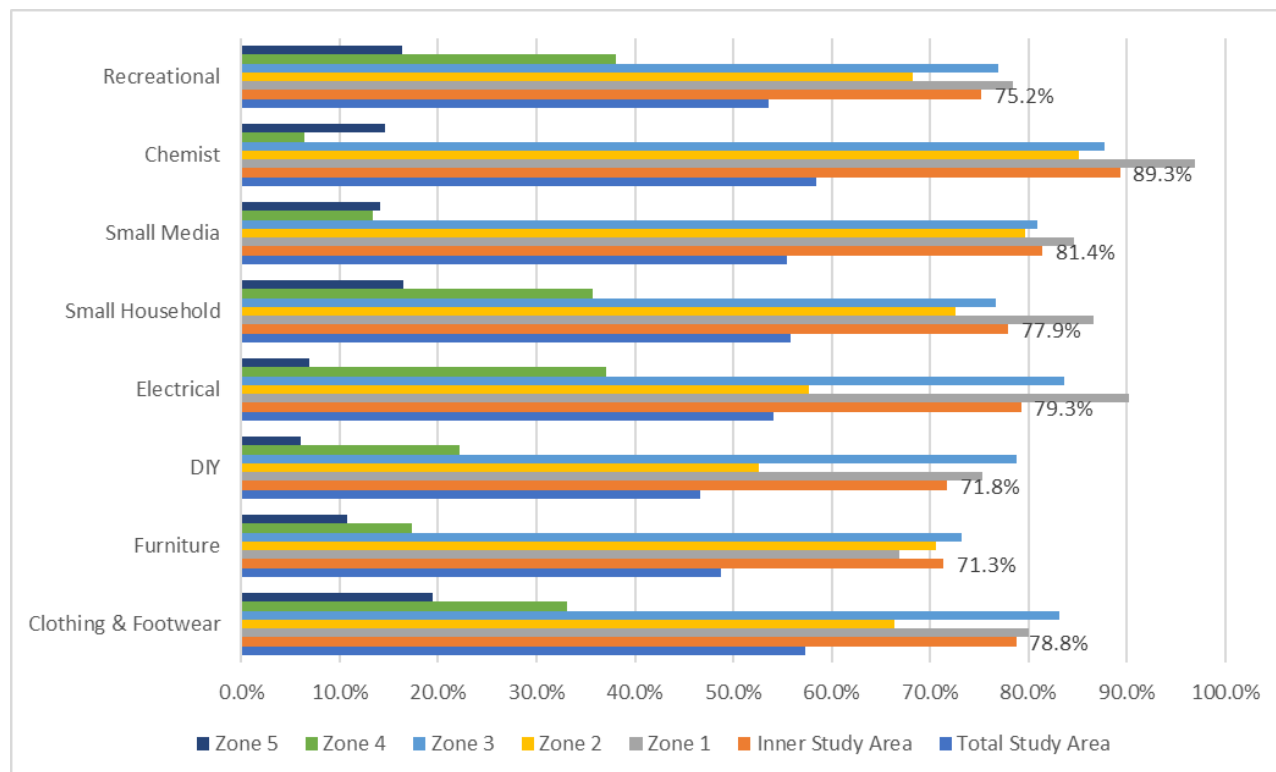


Source: Table 16, Appendix D

4.56 The survey findings show that the majority of comparison goods spending is retained within the Borough in Zones 1, 2 and 3; albeit the retention of residents in Zone 2 is slight lower (68.1%). Inflows of trade from Zones 4 and 5 are reasonable, with nearly 30% of residents in Zone 4 crossing into the Borough to carry out their comparison goods shopping.

4.57 In the graph below, we analyse the market share of different types of comparison goods, considering which items are purchased from stores and centres inside the Borough, and what the propensity is to travel further afield for certain items.

Figure 4.58.1 Comparison Goods Market Share by Goods Category



Source: Tables A8 to A16, Appendix D

- 4.58 The survey results show that there is some variance between spending on different goods categories, as well as between different Zones. Looking at the figures for the Inner Study Area, the amount of spending carried out within the Borough varies from 71.3% of spending on furniture goods, to 89.3% of spending on chemist goods. It should be noted that, relative to all parts of the UK, these are high levels of retention across the board.
- 4.59 It is evident that residents of Zone 1 (Armagh), Zones 2 (Banbridge) and Zone 3 (Craigavon) look to the Borough to provide the whole range of the comparison goods categories, which is positive. However, residents of Zone 2 (Banbridge) appear to be less satisfied with the offer in the categories of DIY, Clothing and Footwear, and Electrical goods.

### Comparison Goods Capacity

- 4.60 The methodology for calculating capacity for comparison goods floorspace differs from that used to model capacity for convenience goods floorspace. The principal reason for this is that there are no robust, industry standard, benchmark sales densities for calculating the turnover of smaller independent retailers that typically make up the majority of the comparison provision of town centres (although it is noted that sales densities are published for national multiple comparison retailers). Moreover, the trading levels of comparison retailers can fluctuate significantly depending on a number of localised variables, most notably the location of the retailer relative to similar providers (as customers are more likely to link multiple comparison goods trips to retailers in close proximity to each other).
- 4.61 As such, we adopt the approach that comparison goods retailers across the Study Area are trading 'at equilibrium' at 2022, meaning we adopt the survey derived turnover of each facility and examine capacity by measuring the growth in available expenditure to 2035. For the purposes of our assessment, we have assumed that the Borough's attraction to Study Area residents will remain constant at 54.7% of all spending proportionate to population growth (Table 16 of

Appendix D). Based on the limited scale of planned developments inside and nearby the Borough, we consider this a robust basis for analysis. The survey turnover is then adjusted to account for inflow from outside of the Study Area, per Nexus professional judgment. The figure below sets out the resultant gross comparison goods capacity forecasts over time, whereby by 2035 there will be a £50.1m of comparison expenditure capacity.

Figure 4.62.1 Gross Comparison Goods Surplus

| Year | Survey Turnover (with Inflow) (£m) | Benchmark Turnover (£m) | Available Expenditure Before Commitments (£m) |
|------|------------------------------------|-------------------------|-----------------------------------------------|
| 2025 | £758.0                             | £752.2                  | £5.8                                          |
| 2030 | £869.6                             | £845.2                  | £24.3                                         |
| 2035 | £1,100.1                           | £961.0                  | £50.2                                         |

Source: Table 18a, Appendix D

4.62 We then consider committed and extant planning permissions for new comparison retail floorspace across the Study Area that are likely to come forward over the plan period, again informed by our discussions with Council officers. This includes any developments that are currently under construction, or would not have been operating at the time of the household survey.

4.63 In total, these committed developments equate to a net 3,048 sq m of comparison goods floorspace and an estimated turnover of £14.6m at 2022 (see Table 17c at Appendix D). The commitments are then projected forwards and deducted from the surplus expenditure. Once accounted for, we are able to calculate the net comparison goods capacity for the Borough, as shown in the figure below. By 2035 we estimate there will be between 4,023 sq m net and 6,322 sq m net of comparison floorspace capacity across the Borough.

Figure 4.64.1 Net quantitative 'capacity' for new comparison goods in the Borough

|      | Surplus Expenditure (£m) | Total Capacity in the Borough (sq m net) |    |        |
|------|--------------------------|------------------------------------------|----|--------|
| 2025 | -£9.9                    | -2,638                                   | to | -1,679 |
| 2030 | £6.7                     | 1,021                                    | to | 1,604  |
| 2035 | £30.2                    | 4,023                                    | to | 6,322  |

Source: Table 18a, Appendix D

4.64 We have then examined how this capacity might divide among the areas of the Borough, based on existing market shares. This assessment is set out at Tables 18b-18g at Appendix D, and is summarised in the figure below.

4.65 This shows that the majority of capacity is identified in the Craigavon Built-Up Area (between 1,893 sq m and 2,975 sq m net) and in the Portadown Built-Up Area (between 1,127 sq m net and 1,771 sq m net).

Figure 4.66.1 Net quantitative 'capacity' for new comparison goods

| Year | Armagh Built-Up Area    |    |        |
|------|-------------------------|----|--------|
| 2025 | -585                    | to | -372   |
| 2030 | 12                      | to | 20     |
| 2035 | 440                     | to | 692    |
| Year | Banbridge Built-Up Area |    |        |
| 2025 | -1,965                  | to | -1,250 |
| 2030 | -1,065                  | to | -677   |
| 2035 | -64                     | to | -40    |
| Year | Craigavon Built-Up Area |    |        |
| 2025 | 278                     | to | 437    |
| 2030 | 1,043                   | to | 1,639  |
| 2035 | 1,893                   | to | 2,975  |
| Year | Lurgan Built-Up Area    |    |        |
| 2025 | -915                    | to | -582   |
| 2030 | -450                    | to | -286   |
| 2035 | 43                      | to | 67     |
| Year | Portadown Built-Up Area |    |        |
| 2025 | 165                     | to | 260    |
| 2030 | 621                     | to | 975    |
| 2035 | 1,127                   | to | 1,771  |
| Year | Other Areas in ABC BC   |    |        |
| 2025 | 82                      | to | 129    |
| 2030 | 309                     | to | 485    |
| 2035 | 560                     | to | 880    |

Source: Tables 18b to 18g, Appendix D

4.66 We examine the opportunities for growth in more detail in Section 19.

### Leisure Goods Findings

- 4.67 The results of the NEMS Household Telephone Survey offer an indication of locations/facilities where residents of the Study Area satisfy their leisure (namely Indoor Health & Fitness, Cinema, Restaurant, Pubs/Bars/Nightclubs, Ten pin bowling, Casino) and cultural needs. As such, the survey enables us to analyse patterns of travel and potential deficiencies (those that are qualitative in nature) within the Borough.
- 4.68 The modelling of future commercial leisure needs cannot necessarily be based upon the same quantitative model used to estimate retail need. This is because leisure spending is not undertaken regularly and is often influenced by cultural shifts and technological advances.
- 4.69 Nevertheless, we appraise the existing provision of leisure facilities across the Borough, and compare this against recognised sector 'standards' or 'benchmarks'. The completion of this 'benchmarking exercise' allows us to establish deficits and where gaps in the provision of existing facilities may be.

## Existing Market Shares

- 4.70 The NEMS Household Survey asked respondents to describe their leisure and cultural activities and habits. The responses to these questions (Questions 42-52) inform our understanding of leisure trends and needs. The breakdown of the answers to these questions is set out in full at **Appendix B** and we extrapolate the key results here.
- 4.71 In the first instance, it is important to have an understanding of the participation rates and general popularity of leisure activities across the Study Area. In Question 42 of the Household Survey, NEMS asked respondents to identify all of the leisure activities in which they participated (respondents were allowed to identify as many options as they wished). We summarise the results for Zones 1-3 which broadly comprise the Borough (i.e. the 'Inner Study Area') in Figure 4.71.1.

Figure 4.72.1 Participation in Leisure Activities (%)

| Leisure Activity        | Zone 1 – Armagh Area | Zone 2 – Banbridge Area | Zone 3 – Craigavon Area | Inner Study Area |
|-------------------------|----------------------|-------------------------|-------------------------|------------------|
| Indoor Health & Fitness | 22.0%                | 15.9%                   | 21.2%                   | <b>20.2%</b>     |
| Cinema                  | 41.1%                | 39.3%                   | 41.1%                   | <b>40.7%</b>     |
| Restaurant              | 62.7%                | 71.8%                   | 69.8%                   | <b>68.6%</b>     |
| Pubs/Bars/Nightclubs    | 30.2%                | 25.2%                   | 26.6%                   | <b>27.1%</b>     |
| Ten pin bowling         | 13.3%                | 7.5%                    | 11.4%                   | <b>11.0%</b>     |
| Casino                  | 0.0%                 | 0.0%                    | 0.8%                    | <b>0.5%</b>      |
| Cultural Activities     | 29.5%                | 25.2%                   | 30.0%                   | <b>28.8%</b>     |

Source: Appendix B. Question 42 of NEMS Household Survey

- 4.72 As evident in the figure above, the most popular leisure activity across the Borough is to go to a restaurant, which 68.6% of residents indicated they do on at least an occasional basis. The second most popular activity is going to the cinema (40.7%), followed by visits to cultural facilities such as theatres/museums/art galleries (28.8%). Visiting casinos (0.5%), is the least popular activity followed by ten-pin bowling (11.0%).
- 4.73 Generally speaking, visitation rates are lower than those we have experienced in most parts of the UK, and in Northern Ireland. Indoor health and fitness participation (20.2%), and visits to pubs/bars/nightclub visits (27.1%) are considerably below our observed norm.
- 4.74 There were not significant differences in participation rates between Zones overall. However, residents in Zone 5 (the Eastern Fringe) are marginally more likely to undertake leisure pursuits than the other areas, with residents in Zone 2 (the Banbridge Area) the least likely overall. Most specific activities have fairly similar participation rates across the board, though notably cinema-going is more popular in Zone 5 (the Eastern Fringe area) than in other areas, and restaurant-going was considerably popular in Zone 1 (the Armagh Area) than in other areas.

4.75 NEMS also asked a series of questions to understand where residents of each zone usually undertake their chosen leisure activity. We examine the most popular destinations for residents of the Borough in the figure below. Again, we only consider here the results for Zones 1-3 of the Study Area (i.e. the Inner Study Area).

Figure 4.76.1 Most Popular Leisure Destinations – Residents of Zones 1-3 (%)

| Leisure Activity        | First Choice                   | Second Choice                 | Third Choice                     |
|-------------------------|--------------------------------|-------------------------------|----------------------------------|
| Indoor Health & Fitness | Craigavon Local Centre (15.3%) | Banbridge Town Centre (14.0%) | Armagh City Centre (13.0%)       |
| Cinema                  | Omniplex, Craigavon (38.9%)    | Omniplex, Banbridge (20.1%)   | Omniplex, Armagh (17.3%)         |
| Restaurant              | Portadown Town Centre (15.3%)  | Banbridge Town Centre (14.1%) | Armagh City Centre (10.9%)       |
| Pubs/Bars/Nightclubs    | Belfast City Centre (21.3%)    | Armagh City centre (17.1%)    | Portadown Town Centre (15.2%)    |
| Ten pin bowling         | Airtastic, Craigavon (45.4%)   | Lisburn Bowl, Lisburn (39.8%) | Sheepbridge Centre, Newry (4.5%) |
| Casino                  | N/A                            | N/A                           | N/A                              |
| Cultural Activities     | Belfast City Centre (54.8%)    | Armagh City Centre (34.5%)    | Dublin City Centre (3.2%)        |

Source: Appendix B. Questions 43-49 of NEMS Household Survey

4.76 The results highlight in particular, the importance of the purpose built centres at Craigavon for commercial leisure provision, with the centre proving the most popular destination for indoor health& fitness, cinema-going and tenpin bowling trips. In terms of food and drink, restaurant-going was popular in Portadown, Banbridge and Armagh, whilst Belfast was the most popular destination for pubs, bars and nightclubs, as well as cultural activities (theatre, galleries etc.).

#### Need for Additional Leisure Facilities

4.77 Question 50 of the Household Survey found that over half of all respondents across the borough (59.3%) did not identify any leisure facilities which they wished to see more. This suggests that residents are largely happy with the provision of facilities. Such a response is slightly higher than our survey average across the UK.

4.78 In the figure below, we isolate the responses for each Zone of the Inner Study Area in order to identify what the main requests for new leisure facilities were from residents in each area, and whether there are any easily identifiable gaps in provision. More than one suggestion was allowed.

Figure 4.79.1 Leisure Activities residents want to see more of (%)

| Leisure Activity              | Zone 1 – Armagh Area | Zone 2 – Banbridge Area | Zone 3 – Craigavon Area | Total Inner Study Area |
|-------------------------------|----------------------|-------------------------|-------------------------|------------------------|
| Activities for Young Children | 4.9%                 | 3.0%                    | 4.4%                    | <b>4.2%</b>            |
| Activities for Teenagers      | 8.6%                 | 5.1%                    | 2.0%                    | <b>4.2%</b>            |
| Indoor Swimming Pool          | 2.6%                 | 2.1%                    | 5.5%                    | <b>4.1%</b>            |
| Restaurants                   | 1.4%                 | 2.1%                    | 4.8%                    | <b>3.4%</b>            |
| Ice Rink                      | 6.0%                 | 0.0%                    | 3.1%                    | <b>2.4%</b>            |

Source: Appendix B. Question 50 of NEMS Household Survey

**4.79** The results show that there is no particularly notable request for any one item in any of the Zones. Broadly speaking, residents within the Borough are happy with their provision of leisure facilities. However, there is a flavour that residents are concerned at the opportunities available for young people to undertake leisure activities, either as part of family groups or as teenagers. Also notable, is that satisfaction levels are slightly lower in Zone 1 (the Armagh area) than elsewhere in the Borough.

**4.80** Despite a broad picture of residents being content with their leisure provision, this does not mean though, that qualitative or quantitative improvements might not be welcome in all areas of the Borough. We examine below the scale of capacity which might arise by the end of the Plan period in 2035.

#### Capacity for Additional Leisure Facilities

**4.81** Having identified existing market shares and examined the demand for new facilities from the Borough's residents, we consider here the potential supply-side issues for the provision of new leisure facilities. The purpose of this assessment is to examine the realism and viability of actually providing for new facilities through the Plan process in particular.

**4.82** The findings of the NEMS Household Survey allow us to assess market shares within the Borough for a variety of leisure sectors. As such, we have undertaken a 'benchmarking' exercise by referencing the estimated increases in the Borough population. The results of the 'benchmarking' exercise have been used to inform our conclusions with regards to the prospective future need for additional commercial leisure facilities.

#### Health and Fitness Capacity

**4.83** The Leisure Database Company<sup>24</sup> (May 2019) identify that the level of health and fitness clubs in the UK is higher than it has ever been before, with more clubs and more members. In terms of membership rates across the whole of the UK, the Leisure Data Base Company outlines that 15.6% of the UK's population are registered members at private health and fitness clubs meaning that 1 in every 7 people is a member of a gym. In 2019, there were in the region of 7,239 health and fitness clubs operating across the UK (up from 7,038 in 2018). The biggest area of growth has come from low-cost gyms, which account for over 35% of memberships in the private sector.

<sup>24</sup> State of the UK Fitness Industry 2019, Leisure Database Company, May 2019

<sup>28</sup> As identified by the Office for National Statistics' Population Estimates for the UK

4.84 In 2016, Statista reported that the average size of mainstream gym, health-club and leisure centre membership in the UK was approximately 5,250 members per club. Building on this, our household survey results showed that approximately 20.2% of residents in the Inner Study Area participate in health and fitness activities (Q42). Of those, the survey results suggest that around 87.0% of residents currently carry out their health & fitness activities within the Borough itself (Q43). We term this the 'Borough attraction rate', and use it as a benchmark (assumed to be constant) to underpin our assessment of the number of additional facilities that can be supported in the Borough over time.

4.85 In the figure below we identify that the Inner Study Area has a population of 227,919 at 2022, which is set to increase to 232,978 by 2025, to 240,249 by 2030 and to 246,768 by 2035. Based on the current participation rates, attraction rates, and average club size membership identified above, we calculate that the Borough's residents could support between seven and nine large health and fitness centres over the Plan period.

Figure 4.86.1 Health & Fitness Centre Capacity

| Year | Inner Study Area Population | Regular Participants @ 20.2% | Borough Attraction Rate @ 87.0% | Average Membership | No. of Clubs Supported in the Borough |
|------|-----------------------------|------------------------------|---------------------------------|--------------------|---------------------------------------|
| 2022 | 227,919                     | 46,040                       | 40,054                          | 5,250              | 7.6                                   |
| 2025 | 232,978                     | 47,062                       | 40,944                          | 5,250              | 7.8                                   |
| 2030 | 240,249                     | 48,530                       | 42,221                          | 5,250              | 8.0                                   |
| 2035 | 246,768                     | 49,847                       | 43,367                          | 5,250              | 8.3                                   |

4.86 Comparing capacity to supply, we consider that there may be some opportunity to expand supply over the Plan period. Our survey results showed there to be popular leisure centre destinations in Armagh (Orchard Leisure Centre), Banbridge (Banbridge Leisure Centre) and Craigavon (South Lake Leisure Centre). Together, these destinations account for around 30% of all indoor health and fitness trips. These destinations are supplemented by the likes of Duffy Fitness (Armagh) and Fitness Factory (Lurgan). Beyond that, provision is made up of a number of smaller facilities. Our survey identified at least 10 other smaller gyms across the Borough that attract market share from the resident population. However, there are no major private facilities which we would anticipate could cater for memberships in the order of the average set out above (i.e. over 5,000 members).

4.87 The qualitative results of our survey (Figure 4.78.1) pointed towards some degree of concern over a perceived lack of health and fitness facilities in the Borough, with residents citing a lack of facilities for young people. At the same time, there were very few calls for any new leisure centres or gymnasiums.

4.88 We therefore recommend that the Council remains welcoming of commercial competition in general, not least because of the health and well-being benefits for residents, but that there is unlikely to be a requirement to allocate any specific site for this purpose.

#### Cinema Capacity

4.89 The Borough has four mainstream cinemas, providing a total of 24 screens. This comprises the Omniplex cinemas in Armagh (4 screens), Banbridge (8 screens) and Craigavon (8 screens), as well as the Iveagh Movie Studio in Banbridge (4

<sup>28</sup> As identified by the Office for National Statistics' Population Estimates for the UK

4.90 The NEMS Household Survey outlines that these four cinemas attract 81.5% of all cinema trips made by residents of the Borough (2014). [www.gotenpin.co.uk/about](http://www.gotenpin.co.uk/about)

4.91 In 2019 (before the impact of Covid-19 on the cinema industry), the UK Cinema Association identified that total UK cinema admissions were 176.1 million, equating to 2.7 trips per person. They also identified 840 cinema facilities with 4,564 screens in the UK, equating to 937,161 cinema seats in the UK. Based on this data, the UK yearly average was 38,585 cinema trips per screen.

4.92 As shown in the figure below, in order to gauge the number of cinema screens that can be supported in the Borough over the Plan period, we have calculated the anticipated cinema attendance (based on the national average of 2.7 trips per person). We also account for the Borough's current cinema trip attraction rate and assume that this will persist over the Plan period.

Figure 4.93.1 Cinema Screen Capacity

| Year | Inner Study Area Population | Cinema Visits per Person | Total Cinema Attendance | Borough Attraction Rate @ 81.5% | Trips per Screen | Cinema Screens Supported |
|------|-----------------------------|--------------------------|-------------------------|---------------------------------|------------------|--------------------------|
| 2022 | 227,919                     | 2.7                      | 615,381                 | 501,536                         | 38,585           | 13.0                     |
| 2025 | 232,978                     | 2.7                      | 629,041                 | 512,668                         | 38,585           | 13.3                     |
| 2030 | 240,249                     | 2.7                      | 648,672                 | 528,668                         | 38,585           | 13.7                     |
| 2035 | 246,768                     | 2.7                      | 666,274                 | 543,013                         | 38,585           | 14.1                     |

4.93 Our benchmarking exercise suggests that the current provision of 24 screens is more than sufficient to serve the needs of the resident population to the end of the Plan period.

4.94 We also note that our quantitative findings showed relatively little discontent with existing provision, with just 1.7% of respondents requesting additional cinema facilities (Q50).

#### Ten-Pin Bowling Capacity

4.95 Ten-pin bowling has generally experienced a decline over the last decade, with a gradual reduction in the number of facilities. In 2014, Mintel identified that there were 5,617 bowling lanes<sup>25</sup>, a decrease since 2011 where 5,773 bowling lanes were identified<sup>26</sup>. More recent data from 2021 suggests that this number has declined further to around 3,700 lanes across the UK<sup>27</sup>.

4.96 Taking into account the UK population at the time this latest data was produced (67.1 million<sup>28</sup>), this equates to one lane

<sup>25</sup> Ten-pin Bowling – UK' Mintel, May 2014

<sup>26</sup> 'Ten-pin Bowling – UK', Mintel, November 2011

<sup>27</sup> [www.gotenpin.co.uk/about](http://www.gotenpin.co.uk/about)

<sup>28</sup> As identified by the Office for National Statistics' Population Estimates for the UK

- 4.97 There is now just one ten-pin bowling facility in the Borough; the Airtastic Entertainment Centre, Craigavon (12 lanes). Until recently there was also an 8-lane provision at Centrepont Leisure, Lurgan, but this facility closed in February 2022.
- 4.98 The Airtastic facility attracts 45.4% of all trips made by residents of the Borough. The majority of trips are therefore made to destinations outside the Borough, and predominantly this is to the Lisburn Bowl, which accounts for 39.8% of all trips.
- 4.99 The number of regular participants amongst the Borough's population (11.0%) has been taken into account in order to calculate the number of lanes which could theoretically be supported in the Borough.

Figure 4.100.1 Bowling Lane Capacity

| Year | Inner Study Area Population | Population per Bowling Alley | Lanes Supported |
|------|-----------------------------|------------------------------|-----------------|
| 2022 | 227,919                     | 18,135                       | 12.6            |
| 2025 | 232,978                     | 18,135                       | 12.8            |
| 2030 | 240,249                     | 18,135                       | 13.2            |
| 2035 | 246,768                     | 18,135                       | 13.6            |

- 4.100 The figure above indicates that, based on the assumed benchmark, the Borough's population supports between 12 and 14 lanes over the Plan period. On this basis, it is evident why the current facility in Craigavon is sufficient to support the needs of the Borough population. Whilst there was some suggestion of a requirement for additional provision in the Armagh area (5.1% of respondents to Q50), the recent closure of the facility in Lurgan is likely to suggest that there is insufficient commercial demand for a second facility within the Borough over the Plan period.

#### Restaurants, Pubs, Bars and Café Capacity

- 4.101 We have undertaken an assessment of the potential capacity for additional food and beverage floorspace across the Borough, utilising current market shares as identified through the Household Survey, population and spending growth rates and benchmarking against current levels of provision.
- 4.102 This exercise identifies the future spending available to support additional food and beverage floorspace (in the form of restaurants, pubs, bars, café etc.) over the Plan period to 2035. This approach is not prescriptive, but instead provides an indication of the scope for future development to be supported, in addition to the findings of the assessments of the key centres.
- 4.103 Experian provides localised data on spending on restaurants and cafés per capita, which includes spending on alcoholic drinks (away from home) and take-away meals. This spending was shown to be £840 per annum<sup>29</sup> for residents in the Study Area (2020 prices).

<sup>29</sup> Notably this is a low mid-pandemic base figure, which is grown substantially by Experian in 2021 (21.9%) and 2022 (24.1%) to reflect coming out of lockdown.

- 4.104 Taking into account the population growth, and anticipated leisure spending growth rates (Experian Retail Planner 19, Figure 1a), we calculate, in Figure 4.106.1, a total spend across the Study Area of £233.4m at 2022, increasing to £302.4m by 2025, £325.1m by 2030 and £349.2m by 2035.
- 4.105 This spending is then attributed to the restaurant, café and bar facilities across the Borough. The household survey results (Q45 and Q46) showed that restaurants, cafés, bars, pubs etc. within the Borough, attracted 71.9% of their own residents spending.
- 4.106 Growing the 'benchmark' turnover of facilities from current levels on the basis of 1% per annum to account for growth through extensions and trading efficiencies over the Plan period, we find the anticipated spending surplus (or deficit) as follows.

Figure 4.107.1 Restaurant, Pubs, Bars and Café Spending

| Year | Inner Study Area Population | Spend Per Capita | Total Spend | Retention Rate @ 71.9% | Growth in Spending | Benchmark Growth | Residual Spending |
|------|-----------------------------|------------------|-------------|------------------------|--------------------|------------------|-------------------|
| 2022 | 227,919                     | £1,024           | £233.4m     | £167.8m                | -                  | -                | -                 |
| 2025 | 232,978                     | £1,298           | £302.4m     | £217.4m                | £49.6m             | £5.0m            | £44.6m            |
| 2030 | 240,249                     | £1,353           | £325.1m     | £233.7m                | £65.9m             | £13.4m           | £52.5m            |
| 2035 | 246,768                     | £1,415           | £349.2m     | £251.1m                | £83.3m             | £21.8m           | £61.5m            |

Source: Nexus Analysis

Figure 4.107.2 Restaurant, Pubs, Bars and Café Capacity

| Year | Residual Spending | Sales Density | Floorspace (sq m) |
|------|-------------------|---------------|-------------------|
| 2025 | £44.6m            | £5,150        | 8,660             |
| 2030 | £52.5m            | £5,400        | 9,720             |
| 2035 | £61.5m            | £5,650        | 10,880            |

Source: Nexus Analysis

- 4.107 We find a total food and beverage spending surplus across Armagh, Banbridge and Craigavon Borough of £52.5m by 2030 and £61.5m by 2035.
- 4.108 Adopting an average sales density of £5,000 per sq m at 2022 (again, projected to grow in line with a 1% sales efficiency) we calculate the typical restaurant, pub and café floorspace that could be supported by the identified surplus

expenditure. This is shown as being up to 9,720 sq m at 2030 and 10,880 sq m by 2035. This should be treated only as a rough guide.

- 4.109 We are highly cognisant of the fact that the recent pandemic will have resulted in the closure of a large amount of restaurant, bar and café floorspace across the Borough. In addition to the pandemic, there has also been significant increases to business costs including energy & transport. Whilst our figures show that there is likely to be a substantial pent-up consumer demand for additional spending this area, this does not mean that all of that demand should be met through new floorspace. The potential re-occupation of vacant floorspace should be accounted for in the first instance. The Council should also account for any existing committed leisure developments in this respect.

#### Other Leisure Uses

- 4.110 Turning to consider cultural uses (theatre / museum / art galleries), the household survey suggested that over half of residents looked towards Belfast for their cultural activities (54.8% of respondents). This is not surprising due to their relative proximity, as well as the relatively lower-level of mainstream provision in the Borough. The survey also established that there was a low level of demand for new facilities with 1.2% of respondents suggesting that they would like to see a concert hall and theatre come forward in the Borough respectively, and 0.5% suggesting they would like to see more museums or art galleries.
- 4.111 As previously highlighted though, the survey results did though show a relatively high proportion of residents looking to see additional facilities provided for children and teenagers. This will clearly be an area the Council should review in preparation for their emerging Plan. We do note, however, that there is extant planning permission for a family fitness and play zone at 2B & 3 The Boulevard in Banbridge (LPA ref: LA08/2018/1377/F).

#### Leisure – Summary

- 4.112 The above findings present the quantitative and qualitative capacity for new leisure development in Armagh, Banbridge and Craigavon Borough. However, as we noted earlier in this Study, leisure spending is not undertaken regularly and residents will often visit a variety of different facilities depending on a number of factors.
- 4.113 Nevertheless, on the basis of current economic spending forecasts, our benchmarking assessment does not identify any significant gaps in the provision of existing facilities, and the provision of leisure facilities within the Borough is, on the whole, seemingly in line with resident expectations and viable operating capacities.
- 4.114 Notwithstanding our capacity assessments, there is clearly a level of dissatisfaction with the provision of facilities for children in the Borough as a whole, and this may be a focus for future Plan policy.

## 5. Methodology for Town Centre Health Checks

5.1 Health checks are recognised as important planning ‘tools’ for appraising and monitoring the changes in the overall vitality and viability of town centres, and informing both plan-making and decision-taking at the local level.

5.2 In this context, this Report provides detailed health check assessments for the following centres, as directed by our Brief:

- a. Armagh City
- b. Banbridge
- c. Craigavon
- d. Lurgan
- e. Portadown
- f. Dromore
- g. Gilford
- h. Keady
- i. Markethill
- j. Rathfriland
- k. Tandragee
- l. Legahory

5.3 The health checks have been carried out in accordance with the SPPS (Paragraph 6.285) which sets out a number of key performance indicators used to help assess and monitor the overall health and performance of the centres. The general methodology is set out below.

### Engagement of Key Stakeholders

5.4 As part of undertaking the town centre health checks, we were asked by the Council to contact a number of key stakeholders. The subsequent engagement exercises took place via virtual stakeholder engagement sessions, which were attended by the following stakeholder bodies:

- a. Officers at Armagh City, Banbridge and Craigavon Borough Council
  - Place and Project Manager at the Community Plan Department
  - Town Centre Task Force Manager
  - Development Officer Markets & Open Spaces
  - Community Development Officers

- Economic Development Officers
  - Tourism Officer
  - Regeneration Officers
  - City and Town Centre Managers
  - Policing & Community Safety Partnership (PCSP) Manager
- b. Banbridge Chamber of Commerce
  - c. Dromore Traders Association
  - d. Gilford Community Forum
  - e. Lurgan Working Group
  - f. Millennium Court
  - g. Portadown Chamber of Commerce
  - h. Rathfriland Regeneration
  - i. Tandragee Development Initiative

### Retail Composition and Vacancies

- 5.5 The composition of retail and leisure uses has been compiled from Centre Survey data provided by the Council, whereby the units surveyed are arranged into the standard Experian Goad categories i.e. convenience, comparison, service uses, and vacant units. Please note that Goad categorisations do not directly correspond with the Planning (Use Classes) Order (NI) 2015 definitions and that vacancy info relates to ground floor land-use survey findings
- 5.6 The health checks provide an effective 'gap' analysis tool to help identify retail types and categories that are under or over-represented in centres. This is based on benchmarking against Goad UK averages (Experian Category Report, 2022) for all circa 1,950 centres and shopping locations covered by Experian.

### Environmental Quality

- 5.7 An assessment of environmental quality including cleanliness and attractiveness, security and treatment of buildings and open spaces, is undertaken using our own research and observations of the centres, as well as feedback from stakeholder consultation. We also highlight if a centre benefits from a public park.

### Accessibility

- 5.8 A centre's vitality and viability can also be understood through an assessment of accessibility. This is undertaken through our own research, using observations of how easy a centre is to reach; mobility time and cost; public transportation; traffic management and signage; barriers; car parking; and access by other modes (such as cycle or walking). Where possible, we have also drawn on stakeholder feedback to help inform our assessment, as well NEMS household survey results.

## Markets and Events

- 5.9 Whether or not a centre has a market, and the quality and offer of a market, can give an indication as to whether a centre is vital and viable. Information regarding the health of the markets discussed in this report is obtained from our own research and observations of the centres, the household survey, as well as stakeholder consultation.

## Night-Time Economy

- 5.10 The term 'night-time economy' is used to describe a wide range of activities that (typically) take place after 5pm. This could range from a trip to the theatre or cinema, to a family meal, a night out at a club or to picking up groceries after a late work shift. The night-time economy is about catering for a wide range of demographics and interests. As such, in assessing each centre, we look at opening hours, availability and the extent to which there is an evening and night-time economy offer.

## Rental and Yield values

- 5.11 Rental and Yield values have been obtained under license from CoStar.

## Commercial Demand

- 5.12 We have reviewed 'The Requirement List'<sup>30</sup> database to understand what operators seek representation in the respective centres. It is an active database of commercial property requirements. Such requirements were found for Armagh Town Centre, Craigavon Town Centre and Portadown Town Centre
- 5.13 Furthermore, there are 60 retailers who seek non-specific locations across Northern Ireland. These are presented below.

Figure 5.13.1 Operator Requirement List for Northern Ireland

| No. | Occupier             | Size (Min) sq ft | Size (Max) sq ft |
|-----|----------------------|------------------|------------------|
| 1   | Adventure Leisure    | 12,000           | 25,000           |
| 2   | Anytime Fitness      | 3,500            | 8,000            |
| 3   | Apricot Ladies       | 2500             | 3500             |
| 4   | Anchor Hanover       | 30,000           | -                |
| 5   | Arc Cinema           | 12,000           | 30,000           |
| 6   | Aspire LLP           | 30,000           | -                |
| 7   | B&M Stores           | 7,500            | 15,000           |
| 8   | Broadbents           | 20,000           | 120,000          |
| 9   | Build-A-Bear         | 2,200            | 10,000           |
| 10  | Cabü                 | -                | -                |
| 11  | Charles Tyrwhitt     | 1,500            | 2,000            |
| 12  | Churchill Retirement | 1,619            | 10,117           |
| 13  | Coach                | 8,000            | 15,000           |
| 14  | Co-op Food           | 1,500            | 9,000            |
| 15  | Cotswold Outdoor     | 4,000            | 8,000            |
| 16  | Cotton Traders       | 1,500            | 3,000            |

<sup>30</sup> <https://www.therequirementlist.com/>

|    |                           |        |         |
|----|---------------------------|--------|---------|
| 17 | Danescroft                | 25000  | -       |
| 18 | Dough & Co./ Burger Amour | 2,000  | 4,000   |
| 19 | Extrawurst                | 300    | 650     |
| 20 | Farrow & Ball             | 1,000  | 2,500   |
| 21 | Fat Face                  | 1,000  | 6,000   |
| 22 | Flying Tiger              | 1,500  | 3,500   |
| 23 | The Food Warehouse        | 10,000 | 15,000  |
| 24 | Frontier Estates          | 30,000 | -       |
| 25 | Go Outdoors               | 20,000 | 40,000  |
| 26 | German Doner Kebab        | 500    | 2500    |
| 27 | GridServe EV              | -      | -       |
| 28 | Gutter Ball               | 20,000 | -       |
| 29 | Hillary's                 | 1,200  | 2,000   |
| 30 | iiiMobile                 | -      | 500     |
| 31 | Iceland                   | 3,000  | 8,000   |
| 32 | Ionity                    | 1,000  | -       |
| 33 | Jollyes                   | 4,000  | 6,000   |
| 34 | JTF Central               | 30,000 | 120,000 |
| 35 | Jungle Mania              | 7,500  | -       |
| 36 | Lane7                     | 15,000 | -       |
| 37 | Loaf                      | 5,000  | 10,000  |
| 38 | MKM Building Supplies     | 10,000 | 15,000  |
| 39 | Mr Pretzels               | 130    | 250     |
| 40 | Neds Noodle Bar           | 1,200  | 1,500   |
| 41 | OneBelow                  | 5,000  | 15,000  |
| 42 | Pizza Express             | 3,000  | -       |
| 43 | Pure Gym                  | 7,000  | 25,000  |
| 44 | Reef                      | 1,000  | -       |
| 45 | Rock Up                   | 4,500  | 10,000  |
| 46 | Safestore                 | 20,000 | 25,000  |
| 47 | SD Menswear               | 1800   | -       |
| 48 | Snap Fitness              | 5,000  | 10,000  |
| 49 | Spud U Like               | 500    | 1300    |
| 50 | SSE                       | -      | -       |
| 51 | Store Away                | 30,000 | -       |
| 52 | Subway                    | 500    | 2,000   |
| 53 | TenPin                    | 10,000 | 30,000  |
| 54 | The EV Network            | 2,000  | 20,000  |
| 55 | Tomahawk                  | 2,500  | 5,000   |
| 56 | Townhouse                 | 500    | 1000    |
| 57 | Toy Town                  | 4,000  | 8,000   |
| 58 | TRIB3                     | 1,800  | 4,500   |

|    |          |      |       |
|----|----------|------|-------|
| 59 | Whistles | 1500 | 2000  |
| 60 | Wendy's  | 650  | 3,500 |

Source: The Requirement List (June 2022)

## Town Centre Turnover

- 5.14 Town centre turnover is derived from the results of the Household Survey, as presented in Appendix D. As such, the figures quoted do not include the turnover of service uses, or any income from beyond the Study Area.

## Public Opinion

- 5.15 NEMS household survey asked a number of questions about what features of the centre and potential centres are most liked, and what features need to be improved to encourage individuals to visit more often. These matters are discussed in respect of all centres bar Gilford and Legahory, as the household survey did not obtain a large enough sample of participants who visited those centres in order to gain meaningful qualitative results. This is likely a reflection of the smaller size of these centres and the geographical proximity to other (larger) retail destinations. We therefore rely more on our own observations of those centres based on our site visits.

## Footfall

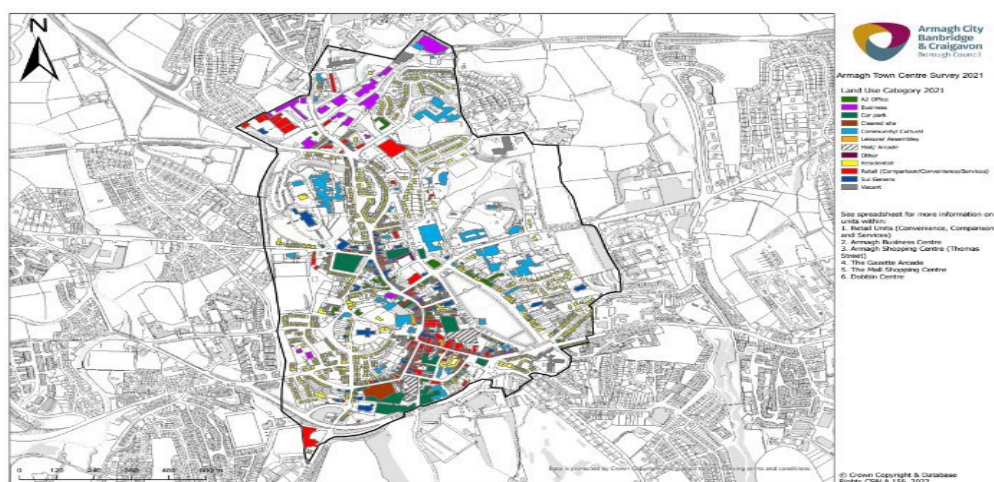
- 5.16 Footfall data has been provided by the Council. This was sourced from Springboard, and is available for each of the Main Town Centres. Data has been in April of the years 2019, 2020, 2021 and 2022; footfall patterns can therefore be seen pre-, during and post-Covid lockdowns. No count data is available for Central Craigavon for 2019 or 2020. Please note that the footfall data may have been impacted by the covid pandemic restrictions or issues such as the location of footfall counters and town centre realm works.

## 6. Armagh Health Check

### Description

- 6.1 Armagh was granted City status in 1994 but is currently designated as a Town Centre (Central Area) in the Armagh Area Plan (AAP) 2004.
- 6.2 It is a historic city, situated in the west of the Study Area and contains a designated conservation area. The adopted town centre is primarily based along Scotch Street, Thomas Street and Upper English Street. There are also several malls and arcades, including The Mall Shopping Centre, the Gazette Arcade and Armagh Shopping Centre.

Figure 6.2.1 Land Use Plan



Source: Armagh City, Banbridge & Craigavon Council

Figure 6.2.2 Photos of Armagh City Centre



Source: Nexus Site Visit (June 2022)

## Composition and Vacancies

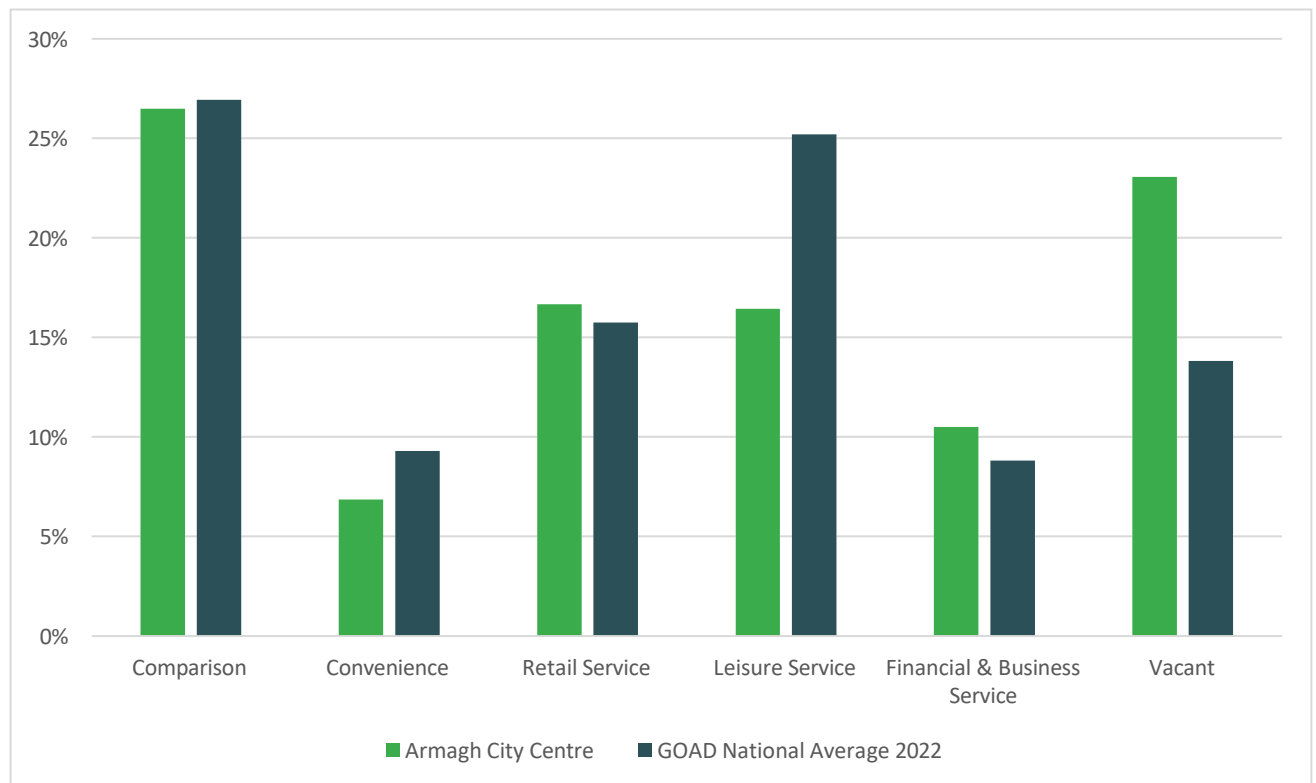
- 6.3 There is a total of 438 units in the adopted Armagh Town Centre, which are a mix of independent and national retailers.
- 6.4 The comparison offer consists of 116 units, which makes up 26.5% of the total offer, very much in line with the UK average of 26.9%. The comparison offer includes many independent retailers such as clothing boutiques, and national retailers such as Superdrug, Card Factory and DV8. Stakeholders identified the strength of independent retailers as a USP of the centre, but also noted that the comparison offer is not overly diverse, and lacking certain types of traders.
- 6.5 The convenience offer consists of 30 units, which makes up 6.8% of the total offer, below the UK average (9.3%). These include medium / large supermarkets, such as Sainsburys, Emersons, McNerneys, Home Bargains, Iceland, Lidl and Marks & Spencer and smaller shops such as butchers, bakers and newsagents.
- 6.6 Services make up 43.6% (191 units) of the total number of units, which is significantly below the UK average (49.8%).
- Retail services make up 16.7% (73 units) of the total offer, slightly higher than the national average of 15.8%. The retail service offer consists primarily of hairdressers, barbers and beauty salons.
  - Leisure services make up 16.4% (72 units) of the total number of units, which is significantly lower than the UK average of 25.2%. The offer includes cafes, restaurants, bars and takeaways, but stakeholders claimed that the offer is underwhelming for a city of its size. According to stakeholders, while the Centre is good for affordable dining, there are few higher end options.
  - Financial & Business Services make up 10.5% (46 units), which is above the UK average of 8.8%. These include banks, solicitors and accountants.
- 6.7 Vacancies account for 101 units which make up 23.1% of the total units, which is significantly higher than the UK average of 13.8%. Some vacancies are long-term; this is particularly the case for historic buildings which require major investment. We understand that more modern units tend to find new tenants relatively quickly.

Figure 6.7.1 Armagh City Centre Composition

| Categories                      | Armagh City Centre 2022 |        | UK Average 2022 |
|---------------------------------|-------------------------|--------|-----------------|
|                                 | (#)                     | (%)    | (%)             |
| Comparison                      | 116                     | 26.5%  | 26.9%           |
| Convenience                     | 30                      | 6.8%   | 9.3%            |
| Services (Total)                | 191                     | 43.6%  | 49.8%           |
| <i>Retail</i>                   | 73                      | 16.7%  | 15.8%           |
| <i>Leisure</i>                  | 72                      | 16.4%  | 25.2%           |
| <i>Financial &amp; Business</i> | 46                      | 10.5%  | 8.8%            |
| Vacant                          | 101                     | 23.1%  | 13.8%           |
| TOTAL                           | 438                     | 100.0% | 100.0%          |

Source: LPA Centre Survey, and Experian GOAD (for UK Average)

Figure 6.7.2 Composition of Armagh City Centre Compared to the UK Average



Source: LPA Centre Survey, and Experian GOAD (for UK Average)

## Environmental Quality

- 6.8 Armagh, which contains a designated Conservation Area, has a historic and characterful city centre with narrow winding shopping streets. The city centre is generally a pleasant area though stakeholders suggested that better cleaning and maintenance is needed. Street lighting in the evenings could also be improved.
- 6.9 Armagh City benefits from a Townscape Heritage Scheme which is a programme for the regeneration of historic urban environments, The scheme provides grants from a 'common fund' to property owners to carry out repair, restoration and refurbishment work to properties which contribute to the townscape character of an area.
- 6.10 The centre also benefits from a number of green spaces/ parks namely The Mall, Astropark, Cathedral Gardens and Sherry's Field playing pitches
- 6.11 The environmental quality of the shopping centres and arcades is notably lower than in the rest of the Centre. Their internal and external appearances were found to be outdated and rundown.
- 6.12 Though there is some anti-social behaviour, the Centre is generally safe. The Centre also has a Purple Flag status, an accreditation for cities and towns which demonstrates that they have a safe and vibrant night-time economy. The city centre benefits from proximity to the open spaces provided by the historic Mall area and the Palace Demesne.
- 6.13 18.3% of survey respondents named environmental factors as a highlight of the Centre; this is the second highest of any Centre in the Study Area.

## Accessibility

- 6.14 Armagh is not served by the railway network but benefits from a bus station in the centre, providing links to Portadown, Lurgan and Newry. However, these services do not seem to be well used; only 2.4% of respondents to the household survey travel to the Centre by bus.
- 6.15 96.0% of household survey respondents travel to Armagh Town Centre by private vehicle. There are ample parking opportunities in the town centre, both on-street, and in large car parks to the south of the Centre. However, 5.5% of respondents claimed that providing more parking facilities would encourage them to visit the Centre more often.
- 6.16 The Centre is on a hill and also relatively spread out. On Scotch Street and Upper English Street, in particular, pavements are fairly narrow. These factors prevent the easy movement of those who are less physically able. Pedestrian movement is at times restricted by vehicles; introducing pedestrianised areas to the Centre may help to alleviate this problem.
- 6.17 Signage can be found throughout the Centre, but on several occasions this signage was found to be incorrect, and therefore likely to confuse visitors. The Council has conducted a signage audit with actions ongoing to improve signage.

## Markets and Events

- 6.18 Shambles Variety Market is held every Tuesday and Friday from 8 am to 4 pm in Shambles Yard, Cathedral Road, Armagh City. The market operates from the open square opposite St Patrick's Roman Catholic Cathedral, and from the listed Johnston Building adjacent (albeit on the day of the visit only one stall here was operating). The market benefits from a Facebook page and is also referenced on other websites. The market hosts a limited number of stalls selling local fruit and vegetables, fish, plants and baked goods. The offer overall is somewhat limited; and with minimal signage the market is hard to find – as such, the overall experience is somewhat underwhelming and not vibrant.
- 6.19 A market outside of the Armagh City Library hosts a rug/carpets stall, a plan/garden supplies stall and men clothing stall. The market is not publicised online; but we understand it is held every Tuesday, Friday and Saturday from 8 am to 4 pm.
- 6.20 There are also a number of events that are held in the centre throughout the year including the Georgian Festival in November; Christmas market; 7 Hills Blues Festival in October and St Patrick's Festival in March. Our research shows that better advertising and marketing is needed to raise awareness of the full offer in the centre.
- 6.21 14.7% of survey respondents visit outdoor or farmers markets. Of these, 16.9% visit the Shambles Variety Market, making it the most popular market in the Study Area. It is particularly popular amongst residents of Zone 1.

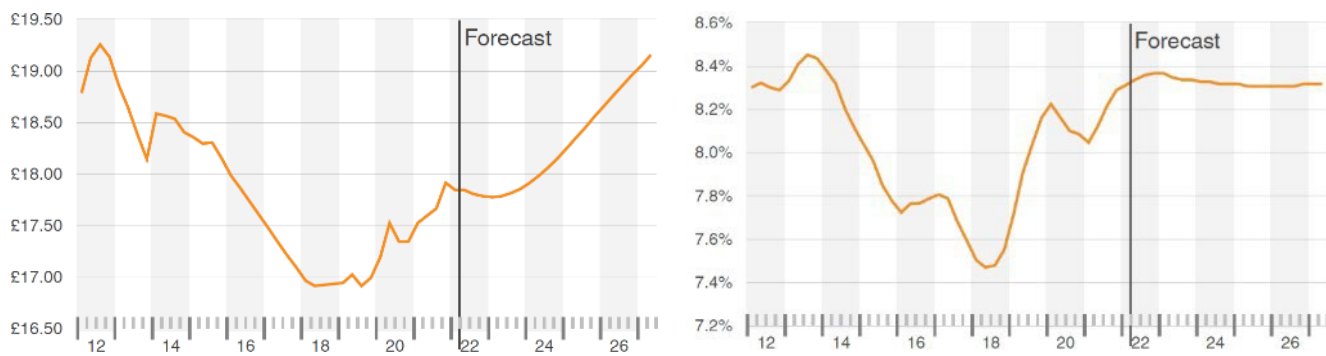
## Night Time Economy

- 6.22 There is a growing night time economy as cafes and restaurants are starting to open later in the evening, but it is still fairly limited. These units are generally spread across the Centre, but some clusters exist, particularly near the theatre, and near the Shambles Market.
- 6.23 The Centre benefits from an Omniplex Cinema and the Market Place Theatre & Arts Centre. However, the entertainment and cultural offering of Armagh Centre was identified as underwhelming by stakeholders.

## Prime Rents and Yields

- 6.24 The CoStar Retail Report 2022 identifies the market rent per square foot to be £17.84. The CoStar Retail Report 2022 identifies market yield in Armagh City Centre to be 8.3%.

## 6.25 Figure 6.24.1 Market Rent per SF and Yield for Armagh City Centre



Source: CoStar Retail Report 2022

## Commercial Demand

### 6.26 We have identified one operator that seeks representation specifically in Armagh City Centre. This is shown in the table below. Furthermore, as detailed in Section 5, there are 60 retailers that seek locations across Northern Ireland.

Figure 6.25.1 Operator Requirement List for Armagh

| Occupier | Description                    | Size (min) sq ft | Size (max) sq ft |
|----------|--------------------------------|------------------|------------------|
| M&S Food | British Multinational Retailer | 12,500           | 25,000           |

Source: The Requirement List (June 2022)

## Town Centre Turnover

| Category              | Town Centre Turnover (p/a) (£) | Town Centre Market Share from the Study Area (p/a) (%) |
|-----------------------|--------------------------------|--------------------------------------------------------|
| Convenience           | £71.6                          | 7.5%                                                   |
| Clothing & footwear   | £27.1                          | 7.1%                                                   |
| Furniture goods       | £6.1                           | 5.8%                                                   |
| DIY goods             | £5.2                           | 5.8%                                                   |
| Electrical goods      | £7.6                           | 5.7%                                                   |
| Small Household goods | £21.9                          | 9.2%                                                   |
| Small Media           | £5.0                           | 7.6%                                                   |
| Chemist goods         | £7.3                           | 10.1%                                                  |
| Recreation goods      | £13.3                          | 9.0%                                                   |
| <b>Total Retail</b>   | <b>£165.2</b>                  | -                                                      |

## Public Opinion

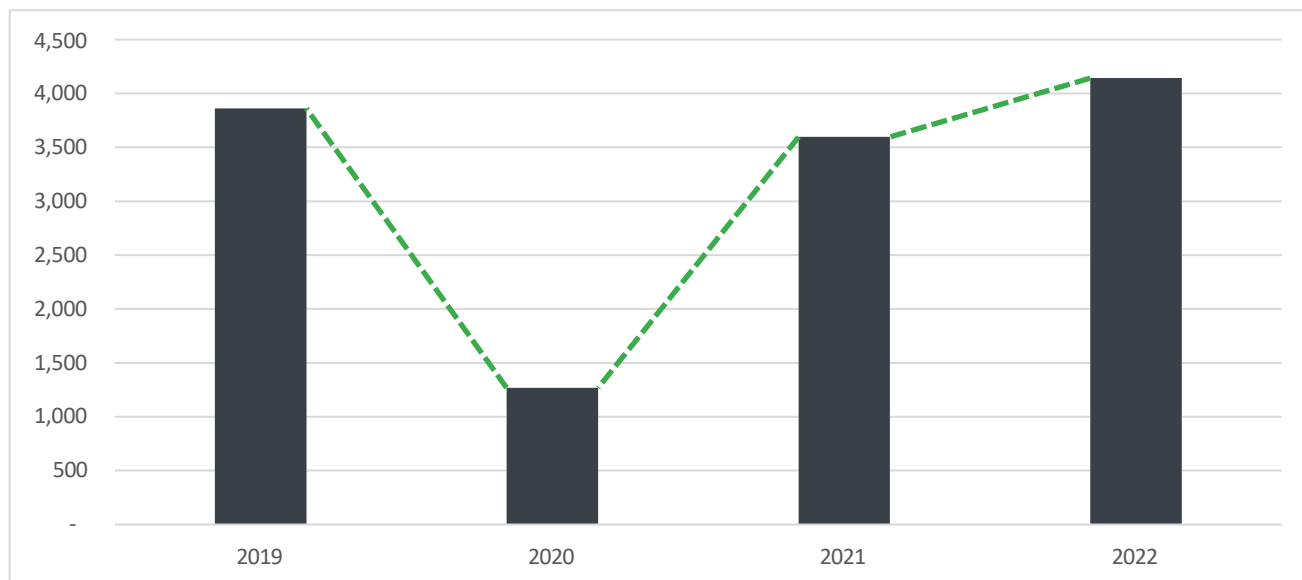
- 6.27 Looking at the market shares, in the Inner Study Area, Armagh CC is the third most popular destination for convenience shopping (11.3%) (after Lurgan TC with 16.2%; and Banbridge out-of-centre destinations with 14.4%). For comparison shopping, Armagh CC with 10.8% sits in third place below Craigavon TC (23.4%) and Portadown (13.1%).
- 6.28 According to respondents of the household survey, the features most liked about Armagh City is that it is close to home or work (21.8%), the choice and range of shops available (10.6%) and it is easy to access by car (8.8%).
- 6.29 In terms of the key interventions identified, these included increasing the range of shops available (10.0%), improving non-food shops within the Centre (5.5%) and providing more parking facilities (5.5%).

## Footfall

- 6.30 Between April 2019 and April 2022, Armagh CC had a footfall increase of 7.3%, the second highest increase of all Main Town Centres.

Figure 6.29.1 Footfall figures for Armagh City, 2019-2022

|                                           | Footfall Nos<br>(26/04/19) | Footfall Nos<br>(24/04/20) | Footfall Nos<br>(30/04/21) | Footfall Nos<br>(29/04/22) | (%) Change from first<br>count - 29/04/22<br>(+or-) |
|-------------------------------------------|----------------------------|----------------------------|----------------------------|----------------------------|-----------------------------------------------------|
| Armagh City (Market Street: 1<br>counter) | 3,860                      | 1,269                      | 3,596                      | 4,142                      | +7.3%                                               |



## Summary of Key Issues

6.31 There is a clear opportunity for the centre to grow its USP, namely:

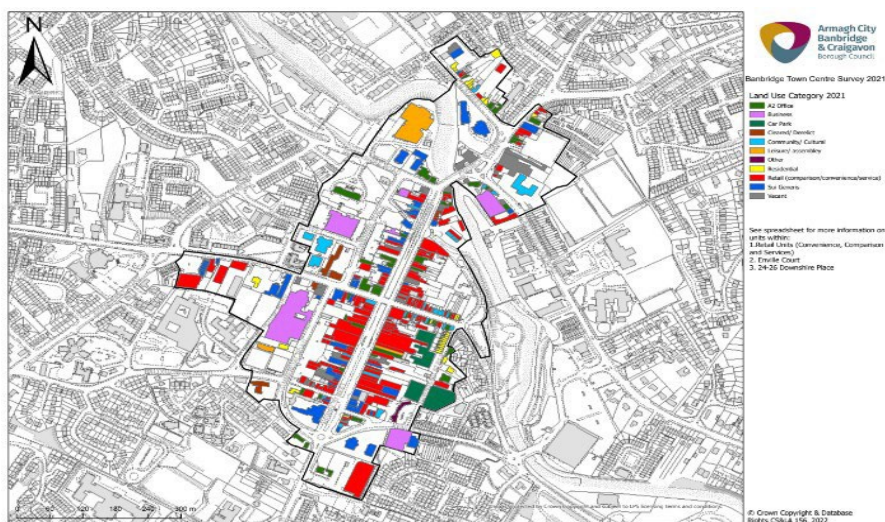
- a. Whilst the centre has a strong independent offer, the overall comparison offer is not particularly diverse and could be improved further.
- b. Whilst the centre's night time economy is growing, it is still limited, not overly vibrant and could benefit from a more defined hub.
- c. The leisure offer needs improvement (e.g. more entertainment, food and beverage and cultural uses are needed) and the events held would benefit from a better marketing strategy/ advertisement.
- d. The centre's markets are underwhelming.
- e. The centre's pleasant historic environment is somewhat diminished by heavy traffic flows, which in turn inhibit pedestrian flows. Introducing pedestrianised areas to the Centre may help to alleviate this problem. Improved connectivity and accessibility would be beneficial, addressing poor public transport connections and incorrect signage.
- f. A holistic strategy to tackle high vacancy rates is necessary.

## 7. Banbridge Health Check

### Description

- 7.1 Banbridge currently holds the status of a designated Town Centre.
- 7.2 Banbridge is a medium-sized town located in the south-east of the Study Area. The Centre is concentrated around the main high street (Newry Street and Bridge Street).
- 7.3 The town also contains the Boulevard Outlet Shopping Park/ Bridgewater Retail Park complex, located some 3 km out of centre.
- 7.4 Banbridge Place Plan is expected to commence in November 2022.

Figure 7.4.1 Land Use Plan



Source: Armagh City, Banbridge and Craigavon Borough Council

Figure 7.4.2 Photos of Banbridge Town Centre



Source: Nexus Site Visit (June 2022)

## Composition and Vacancies

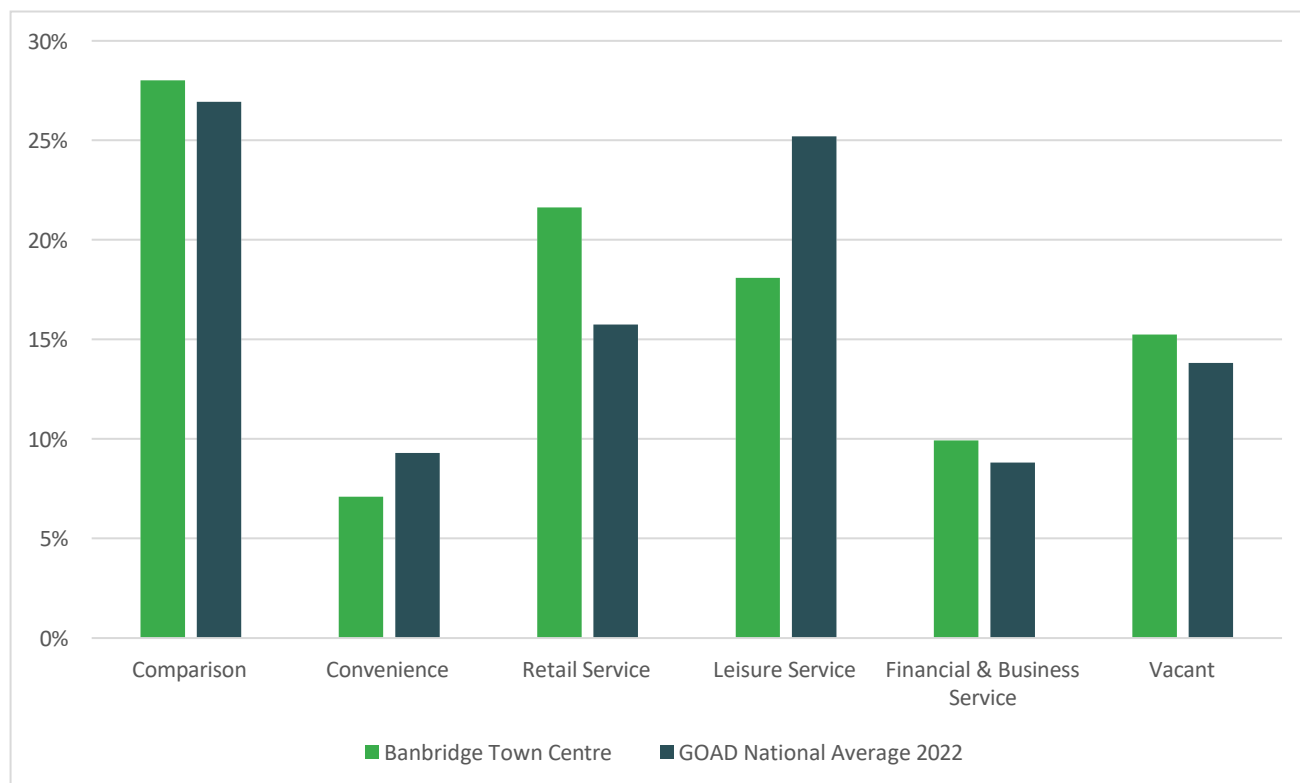
- 7.5 There are a total of 282 units in Banbridge Town Centre. These are primarily independent retailers, but some national retailers are also present. The Centre has a good range and mix of retail units available, and caters for a more affluent and older population.
- 7.6 The comparison offer consists of 79 units, which makes up 28.0% of the total offer, slightly higher than the UK average of 26.9%. The comparison offer is diverse, with many independent retailers specialising in fashion, furniture and jewellery. Though there are some national retailers (Card Factory, Boots and New Look), the majority of these go to the Boulevard outlet.
- 7.7 The convenience offer consists of 20 units, which makes up 7.1% of the total offer, below the UK average (9.3%). Though there is a Lidl and an Iceland, the majority of these are independent butchers, greengrocers and bakeries; Banbridge has a strong reputation for the latter.
- 7.8 Services make up 49.6% (140 units) of the total number of units, which is similar to the UK average (49.8%).
- Retail services make up 21.6% (61 units) of the total offer, which is significantly higher than the national average of 15.8%. These are primarily hair and beauty salons.
  - Leisure services make up 18.1% (51 units) of the total number of units, significantly below the national average of 25.2%. The offer is diverse, including cafes, restaurants, bars and takeaways. However, the stakeholders have identified the food and beverage offer to be somewhat underwhelming for the town of its size: there are good café and restaurants for lunch, but the evening offer is limited and hence more choice is needed.
  - Financial & Business Services make up 9.9% (28 units), which is slightly above the UK average of 8.8%. These include banks, solicitors and accountants.
- 7.9 Vacancies account for 43 units which makes up 15.2% of the total units, which is slightly higher than the UK average of 13.8%. The take-up of vacant properties is generally fairly quick.

Figure 7.9.1 Banbridge Town Centre Composition

| Categories           | Banbridge Town Centre 2022 |        | UK Average 2022 |
|----------------------|----------------------------|--------|-----------------|
|                      | (#)                        | (%)    | (%)             |
| Comparison           | 79                         | 28.0%  | 26.9%           |
| Convenience          | 20                         | 7.1%   | 9.3%            |
| Services (Total)     | 140                        | 49.6%  | 49.8%           |
| Retail               | 61                         | 21.6%  | 15.8%           |
| Leisure              | 51                         | 18.1%  | 25.2%           |
| Financial & Business | 28                         | 9.9%   | 8.8%            |
| Vacant               | 43                         | 15.2%  | 13.8%           |
| TOTAL                | 282                        | 100.0% | 100.0%          |

Source: LPA Centre Survey, and Experian GOAD (for UK Average)

Figure 7.9.2 Composition of Banbridge Town Centre Compared to the UK Average



Source: LPA Centre Survey, and Experian GOAD (for UK Average)

## Environmental Quality

- 7.10 The Centre is generally a pleasant environment. Effort has been made to conceal vacant units, and new street art and murals add to the visual interest of the Centre. However, the Centre could benefit from better cleaning and maintenance.
- 7.11 It is understood that a £5.5 million investment into the public realm is due to be delivered in 2023, with plans to introduce and replace existing street furniture and signage and improve the public realm.
- 7.12 The Centre is generally safe, though there are some elements of anti-social behaviour.

## Accessibility

- 7.13 The vast majority of respondents (97.6%) travel to the Centre by private vehicle. Congestion is an issue during peak times, and the Centre is difficult to navigate by car. Car parking is available both on-street and at car parks to the east of the Centre. However, given that 12.9% of respondents identified parking as an issue, a better parking management system may encourage more visitors to the Centre.
- 7.14 Public transport access to the Centre is available via bus, however, services are fairly limited and infrequent. According to the household survey, only 1.6% of respondents travel to the centre this way. Banbridge is not served by the railway network.

7.15 In terms of pedestrian movement, the main high street has wide pavements, though it is quite steep, which may be difficult to traverse for those with mobility issues. The main high street also experiences high levels of traffic, which can make it difficult for pedestrians to cross the street.

7.16 The centre also lacks a focal point, and there is no real gateway into the centre. This in turn inhibits the legibility of the centre.

## Markets and Events

7.17 Banbridge market takes place on Rathfriland Street near the Solitude Park. This is not advertised online and hence further details are not available. However, we understand it is very small, with the offer being limited to fruit and vegetables. Banbridge market is the second most popular market in the Study Area, with 10.5% of those who visit markets identifying it as a market they visit<sup>31</sup>.

7.18 There are also a number of events that are held in the centre throughout the year including Christmas Lights and Market, Buskfest (an international busking festival) and Sundown Market (a street food festival) which takes place in September in the Solitude Park.

7.19 5.0% of respondents also claimed that more markets and events would attract them to the Centre.

## Night Time Economy

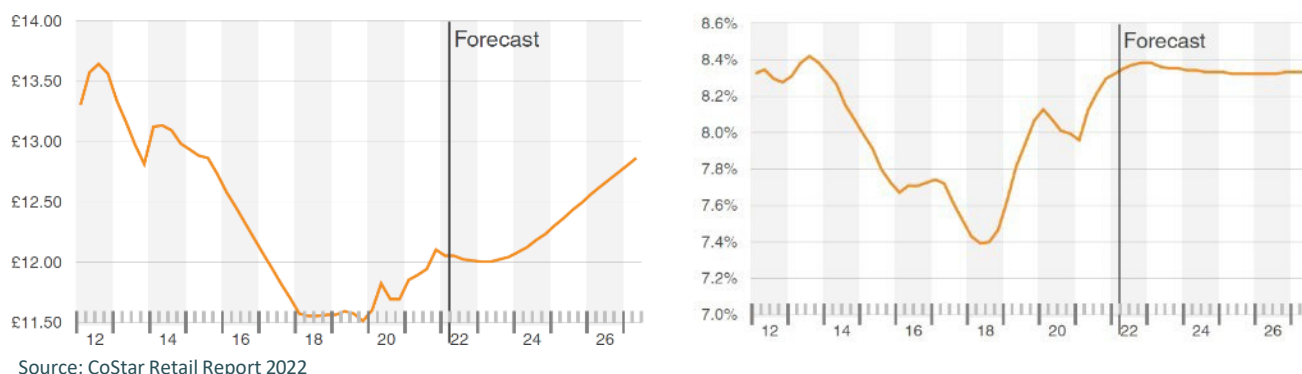
7.20 During conversations with stakeholders, it was identified that there is a limited, but growing evening economy. However, this is sporadic and the centre lacks a night time hub. Shops tend to close by 6pm. The Centre's night time economy was identified by stakeholders as an area which needs improvement.

7.21 Respondents to the household survey suggested that more and improved cafes and restaurants (4.1%) and longer opening hours (3.7%) would encourage them to visit the Centre, suggesting there is an appetite for a night time economy in Banbridge.

## Prime Rents and Yields

7.22 The CoStar Retail Report 2022 identifies the market rent per square foot to be £12.05 and identifies that market yield in Banbridge Town Centre is 8.4%.

Figure 7.22.1 Market Rent per SF and Market Yield for Banbridge Town Centre



<sup>31</sup> The household survey results refer to "Banbridge Flower Market", but we understand that this is the same the market that takes place on Rathfriland Street near the Solitude Park.

## Commercial Demand

- 7.23 We have reviewed The Requirement List database to understand what operators seek representation in the respective centres. We have not identified any retailers that seek representation specifically in Banbridge Town Centre.

## Town Centre Turnover

| Category              | Town Centre Turnover (p/a) (£) | Town Centre Market Share from the Study Area (p/a) (%) |
|-----------------------|--------------------------------|--------------------------------------------------------|
| Convenience           | £28.0                          | 2.9%                                                   |
| Clothing & footwear   | £31.3                          | 8.2%                                                   |
| Furniture goods       | £11.8                          | 11.1%                                                  |
| DIY goods             | £4.2                           | 4.7%                                                   |
| Electrical goods      | £5.9                           | 4.4%                                                   |
| Small Household goods | £17.2                          | 7.2%                                                   |
| Small Media           | £2.4                           | 3.6%                                                   |
| Chemist goods         | £6.1                           | 8.4%                                                   |
| Recreation goods      | £11.3                          | 7.6%                                                   |
| <b>Total Retail</b>   | <b>£118.2</b>                  | -                                                      |

## Public Opinion

- 7.24 Looking at the market shares, in the Inner Study Area, Banbridge TC only draws 4.8% of convenience trade, whereby other centres of similar size/function have a much stronger draw (e.g. Lurgan TC (16.2%), Armagh CC (11.3%), Craigavon TC (8.7%). However, Banbridge out-of-centre destinations have the second higher draw with 14.4%. For comparison shopping with 10.0%, Banbridge TC sits in third place below Craigavon TC (23.4%), Portadown TC (13.1%) and Armagh CC (10.8%).
- 7.25 It should be noted that the Boulevard Outlet Shopping Park/ Bridgewater Retail Park complex currently draws 4.8%. However, Boulevard Outlet Shopping Park (which opened in 2007) is not at full occupancy with approximately half of all units being vacant<sup>32</sup>.
- 7.26 45.2% of visitors said they were attracted to the Centre by the strength of its retail offer, the highest of any Centre in the Study Area.
- 7.27 Improving available parking facilities and hosting more markets and events were identified as measures that could attract more visitors to the centre. 4.1% of respondents asked for improved hospitality venues and 3.7% of respondents asked for longer opening hours, suggesting there is a desire for more of a night-time economy.

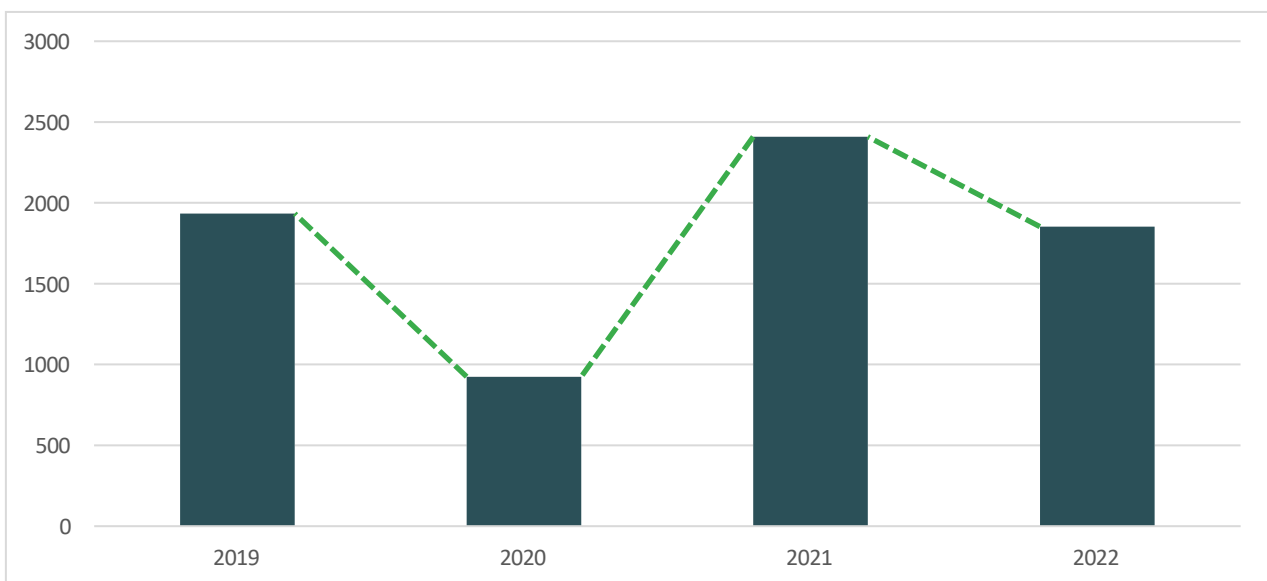
<sup>32</sup> Based on the layout plan on the Boulevard's [website](#)

## Footfall

7.28 Footfall in Banbridge TC recovered post-Covid lockdowns in 2021, but then slumped again in 2022. Between April 2019 and April 2022, footfall decreased by 4.2%.

Figure 7.28.1 Footfall figures for Banbridge, 2019-2022

| ABC Town / City Centre              | 2019  | 2020 | 2021  | 2022  | (%) Change from first count - 29/04/22 (+or-) |
|-------------------------------------|-------|------|-------|-------|-----------------------------------------------|
| Banbridge (Newry Street: 1 counter) | 1,934 | 924  | 2,409 | 1,852 | -4.2%                                         |



## Summary of Key Issues

7.29 There is a clear opportunity for the centre to grow its USP, namely:

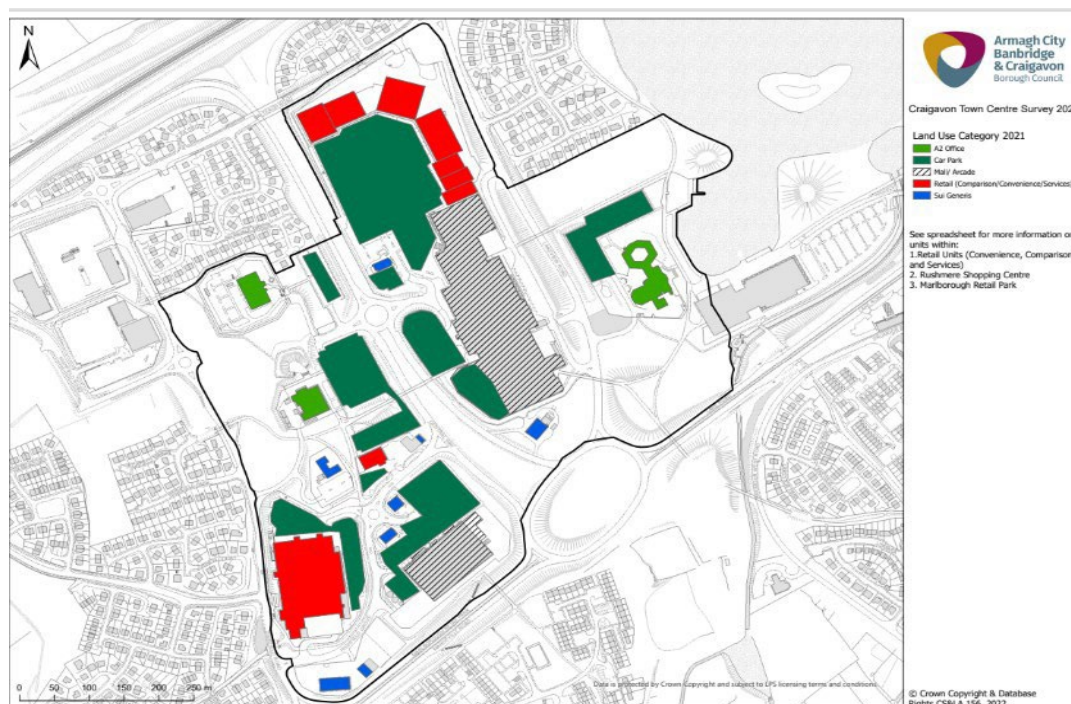
- Whilst the centre's night time economy is growing, it is still limited, not overly vibrant and could benefit from a more defined hub.
- The diversification of food and beverage offer could be beneficial.
- Better traffic and parking management system is needed.
- The centre lacks a focal point and a clear gateway. A better sense of place is needed.

## 8. Central Craigavon Health Check

### Description

- 8.1 Central Craigavon currently holds the status of a designated Town Centre in the Craigavon Town Centre Boundaries & Retail Designations Plan 2010. Central Craigavon is part of the Craigavon Urban Area along with Portadown and Lurgan.
- 8.2 Central Craigavon is a large and modern town centre, consisting primarily of Rushmere Shopping Centre and Marlborough Retail Park. The urban form and modernist design of Central Craigavon was shaped by the 1965 Craigavon 'New Town' designation. It is located adjacent to Craigavon Lakes and the new South Lake Leisure Centre.

Figure 8.2.1 Land Use Plan



Source: Armagh City, Banbridge and Craigavon Borough Council

Figure 8.2.2 Photos of Central Craigavon Town Centre



Source: Nexus Site Visit (June 2022)

## Composition and Vacancies

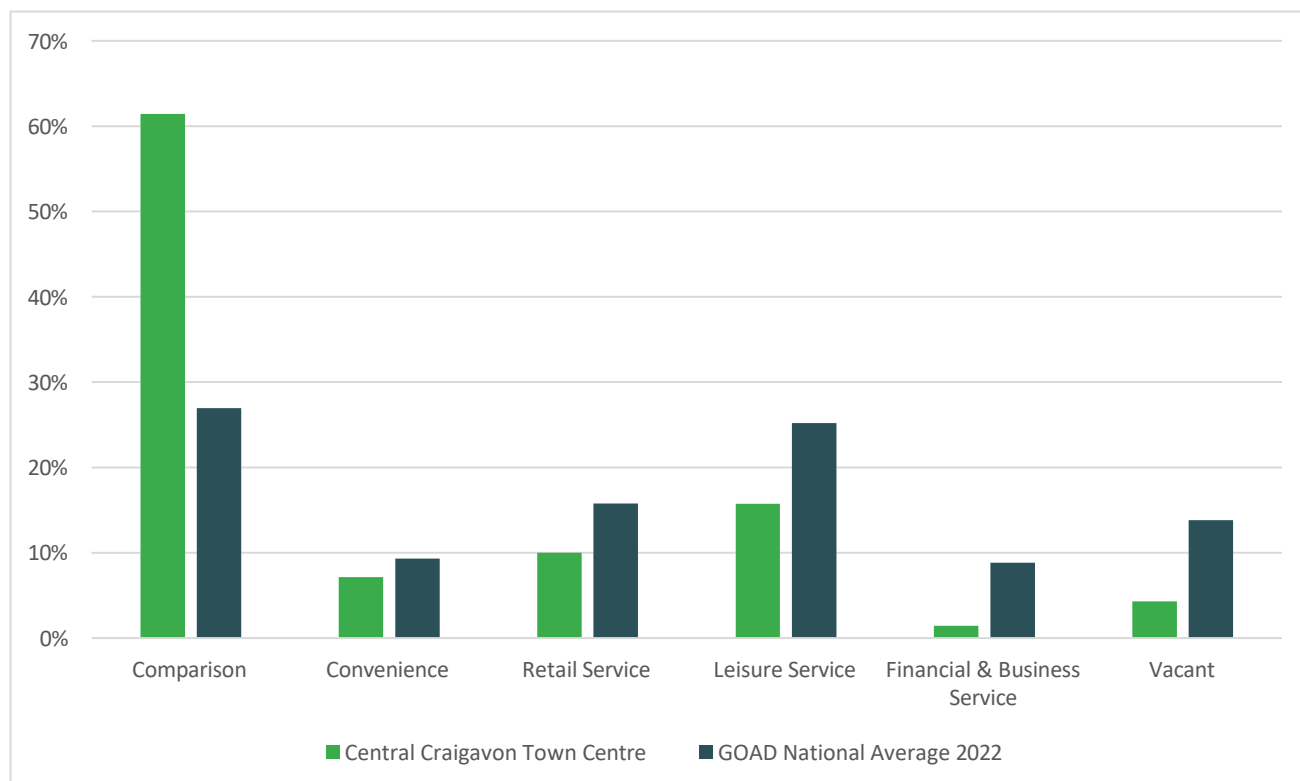
- 8.3 There is a total of 70 units in Craigavon Town Centre, which are predominantly occupied by national retailers.
- 8.4 The comparison offer consists of 43 units, which makes up 61.4% of the total offer, which is significantly above the UK average of 26.9%. The comparison offer is diverse, with an emphasis on fashion and accessories brands such as H&M, New Look, JD Sports, River Island and Trespass. Other national names present include Boots, Superdrug, Yankee Candle and CEX.
- 8.5 The convenience offer consists of five units, which makes up 7.1% of the total offer, below the UK average (9.3%). These are primarily large supermarket chains, the largest being a Tesco Extra to the south-west of the town centre. A variety of budgets are catered for. However, it is missing traders which specialise in particular goods, such as butchers, bakeries or greengrocers.
- 8.6 Services make up 27.1% (19 units) of the total number of units, which is significantly below the UK average (49.8%).
- Retail services make up 10.0% (7 units) of the total offer, which is below the UK average of 15.8%. The offer includes an opticians, a post office, a travel agents and petrol filling station.
  - Leisure services make up 15.7% (11 units) of the total number of units, which is significantly below the UK average of 25.2%. The offer includes cafes, restaurants, drive-throughs and an indoor play area and bowling alley. The limited nature of the leisure service offer was noted by stakeholders, as units are primarily chain cafes and fast food restaurants.
  - Financial & Business Services make up only 1.4% of the total offer, which is considerably lower than the UK average of 8.8%. The only unit is a photo printing service.
- 8.7 Vacancies account for three units which makes up 4.3% of the total units, which is significantly below the UK average of 13.8%. All three vacant units are in Rushmere Shopping Centre, including a large unit that was previously occupied by Debenhams. However, it is understood that this unit is due to be taken over by Primark.

Figure 8.7.1 Central Craigavon Town Centre Composition (Units)

| Categories                      | Central Craigavon Town Centre 2022 |        | UK Average 2022 |
|---------------------------------|------------------------------------|--------|-----------------|
|                                 | (#)                                | (%)    | (%)             |
| Comparison                      | 43                                 | 61.4%  | 26.9%           |
| Convenience                     | 5                                  | 7.1%   | 9.3%            |
| Services (Total)                | 19                                 | 27.1%  | 49.8%           |
| <i>Retail</i>                   | 7                                  | 10.0%  | 15.8%           |
| <i>Leisure</i>                  | 11                                 | 15.7%  | 25.2%           |
| <i>Financial &amp; Business</i> | 1                                  | 1.4%   | 8.8%            |
| Vacant                          | 3                                  | 4.3%   | 13.8%           |
| TOTAL                           | 70                                 | 100.0% | 100.0%          |

Source: LPA Centre Survey, and Experian GOAD (for UK Average)

Figure 8.7.2 Composition of Central Craigavon Town Centre Compared to the UK Average



Source: LPA Centre Survey, and Experian GOAD (for UK Average)

## Environmental Quality

- 8.8** The external appearance of Rushmere Shopping Centre is somewhat outdated, but inside it is clean and well maintained. Seating and greenery in the central aisle make for a pleasant atmosphere. Effort has been made to conceal any vacancies. There are also attractions in the central avenue, such as mobile phone kiosks and nail bars, but also an art exhibition pop-up and a book-swap. Other amenities include public toilets and a customer service desk near the entrance.
- 8.9** Stakeholders noted Rushmere Shopping Centre and Marlborough Retail Park are generally well maintained by the landowners, but also suggested that more lighting is needed to aid accessibility and safety.

## Accessibility

- 8.10** Craigavon is located between the towns of Portadown and Lurgan and is accessible from both towns via the A3. The Centre benefits from extensive car parking, and electric car charging points are available.
- 8.11** A bus station at the rear of Rushmere Shopping Centre provides regular services to Lurgan, Portadown and Armagh.
- 8.12** Although the vast majority of survey respondents travel to Craigavon by car (95.0%), at 3.6%, more people travelled via public transport than any Centre in the Study Area.
- 8.13** The Centre initially presents as a car-oriented destination. There are few pavements, making it difficult for pedestrians to navigate. Due to the spread-out nature of the Centre, it is easier to travel between Rushmere Shopping Centre and Marlborough Retail Park by car than on foot, other than use of pedestrian / cycle link bridge. Recently, there has been investment on pedestrian bridges to connect centres and make them more attractive. The centre is connected to the

extensive 'black-path' cycle and pedestrian path network. This network was part of the Craigavon 'New Town' model and links Lurgan, Central Craigavon and Portadown and has been the subject of recent DfI investment.

## Markets and Events

- 8.14 The Centre does not benefit from a market, nor other regular events.

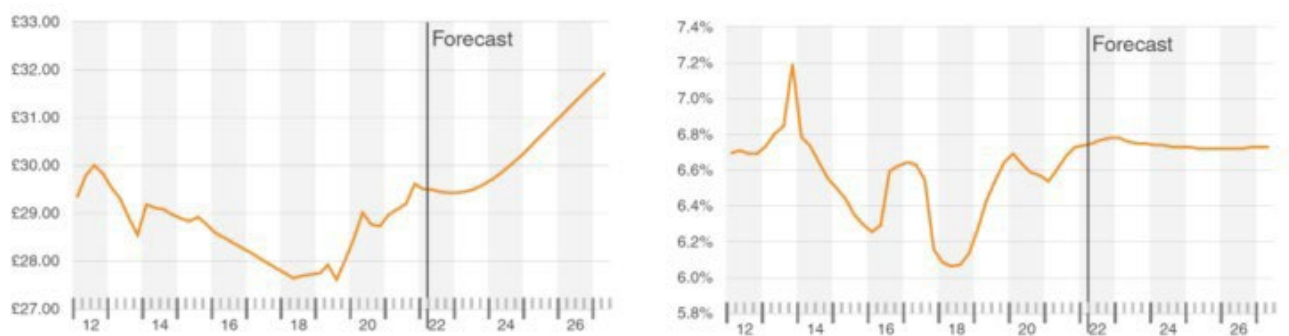
## Night Time Economy

- 8.15 The night time economy is limited, in part due to the limited nature of the leisure services available, as there are few restaurants and no pubs or bars.

## Prime Rents and Yields

- 8.16 The CoStar Retail Report 2022 identifies the market rent per square foot to be £29.49 and identifies that market yield in Craigavon Town Centre is 6.7%.

Figure 8.16.1 Market Rent per SF and Market Yield for Craigavon Town Centre



Source: CoStar Retail Report 2022

## Commercial Demand

- 8.17 We have reviewed The Requirement List database to understand what operators seek representation in the respective centres.
- 8.18 We have identified one operator that seeks representation specifically in Craigavon Town Centre. This is shown in the table below.

Figure 8.18.1 Operator Requirement List for Central Craigavon

| Occupier                | Description           | Size (min) sq ft | Size (max) sq ft |
|-------------------------|-----------------------|------------------|------------------|
| City Electrical Factors | Electrical Wholesaler | 2,750            | 6,000            |

Source: The Requirement List (June 2022)

## Town Centre Turnover

| Category              | Town Centre Turnover (p/a) (£) | Town Centre Market Share from the Study Area (p/a) (%) |
|-----------------------|--------------------------------|--------------------------------------------------------|
| Convenience           | £50.7                          | 5.3%                                                   |
| Clothing & footwear   | £81.2                          | 21.4%                                                  |
| Furniture goods       | £4.5                           | 4.3%                                                   |
| DIY goods             | £14.2                          | 16.0%                                                  |
| Electrical goods      | £31.2                          | 23.4%                                                  |
| Small Household goods | £32.1                          | 13.5%                                                  |
| Small Media           | £7.5                           | 11.3%                                                  |
| Chemist goods         | £3.9                           | 5.4%                                                   |
| Recreation goods      | £17.2                          | 11.6%                                                  |
| <b>Total Retail</b>   | <b>£242.5</b>                  | -                                                      |

## Public Opinion

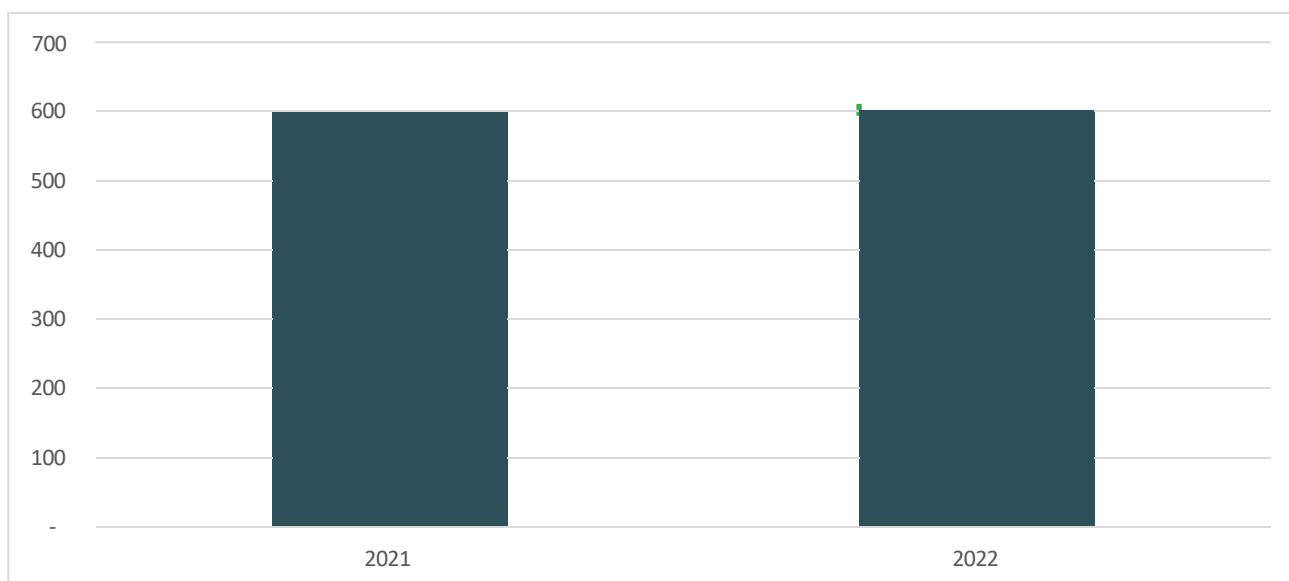
- 8.19 Looking at the market shares, in the Inner Study Area, with 8.7% Craigavon TC sits below Lurgan TC (16.2%), Armagh (11.3%), and Portadown (9.2%); as well as Banbridge out-of-centre destinations (14.4%) and Portadown out-of-centre destinations (9.6%). However, for comparison shopping with 23.4%, Craigavon TC is by far the most popular destination, with Portadown TC (13.1%) being in second place.
- 8.20 30.4% of survey respondents identified the choice and range of shops available as one of the Centre's attractions. 9.1% of respondents also claimed that the Centre is well laid out and shops are close together.
- 8.21 In terms of the key interventions identified, these included an increased general choice and range of shops (8.3%), improved quality of shops (4.2%) and more and improved hospitality venues (3.9%).

## Footfall

- 8.22 Footfall data is only available in Craigavon TC for 2021 and 2022; over the course of this year, footfall increased by 2.9%. It is worth highlighting that the footfall counter for Craigavon TC is located on the pedestrian bridge between the Rushmere Shopping Centre and Marlborough Retail Park and not within the mall / centres so this may explain why the average footfall figure is lower than that for the other centres.

Figure 8.22.1 Footfall figures for Craigavon, 2019-2022

| ABC Town / City Centre                             | 2019 | 2020 | 2021 | 2022 | (%) Change from first count - 29/04/22 (+or-) |
|----------------------------------------------------|------|------|------|------|-----------------------------------------------|
| Central Craigavon (Rushmere footbridge: 1 counter) | N/A  | N/A  | 594  | 611  | 2.9%                                          |



## Summary of Key Issues

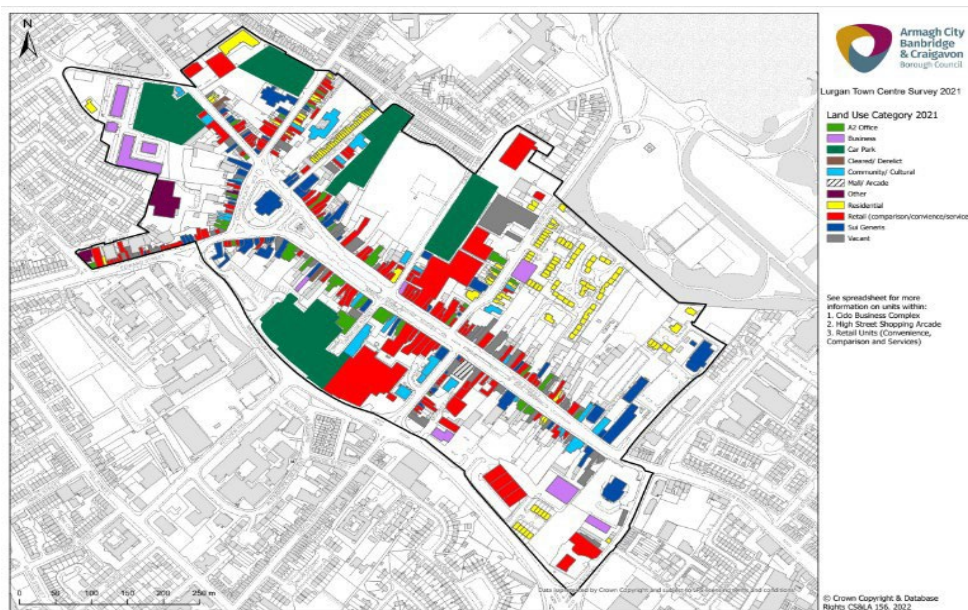
- 8.23 Given its modern retail-park format Craigavon does not function like a typical/traditional town centre. Whilst this has a number of benefits (e.g. low vacancy rates, higher rents; and strong expenditure draw) there are also wider concerns about the centre's ability to meet the needs of its local population, namely:
- a. The offer lacks services, and the food and beverage offer is weak. Night time economy could also be improved as a result.
  - b. Efforts could be made to improve accessibility and movement around the Centre for pedestrians and highlight the opportunities for active travel from use of the existing 'black-path' cycle and pedestrian path network.
  - c. The quality of the environment lacks character and could be improved to create a better sense of place.

## 9. Lurgan Health Check

### Description

- 9.1 Lurgan currently holds the status of a designated Town Centre and contains a Conservation Area around its central core.
- 9.2 Lurgan forms part of the Craigavon Urban Area along with Portadown and Central Craigavon. Its Centre is concentrated primarily around the main high street (Market Street and High Street) and the area surrounding Shankhill Parish Church to the north west of the Centre.

Figure 9.2.1 Land Use Plan



Source: Armagh City, Banbridge and Craigavon Borough Council

Figure 9.2.2 Photos of Lurgan Town Centre



Source: Nexus Site Visit (June 2022)

## Composition and Vacancies

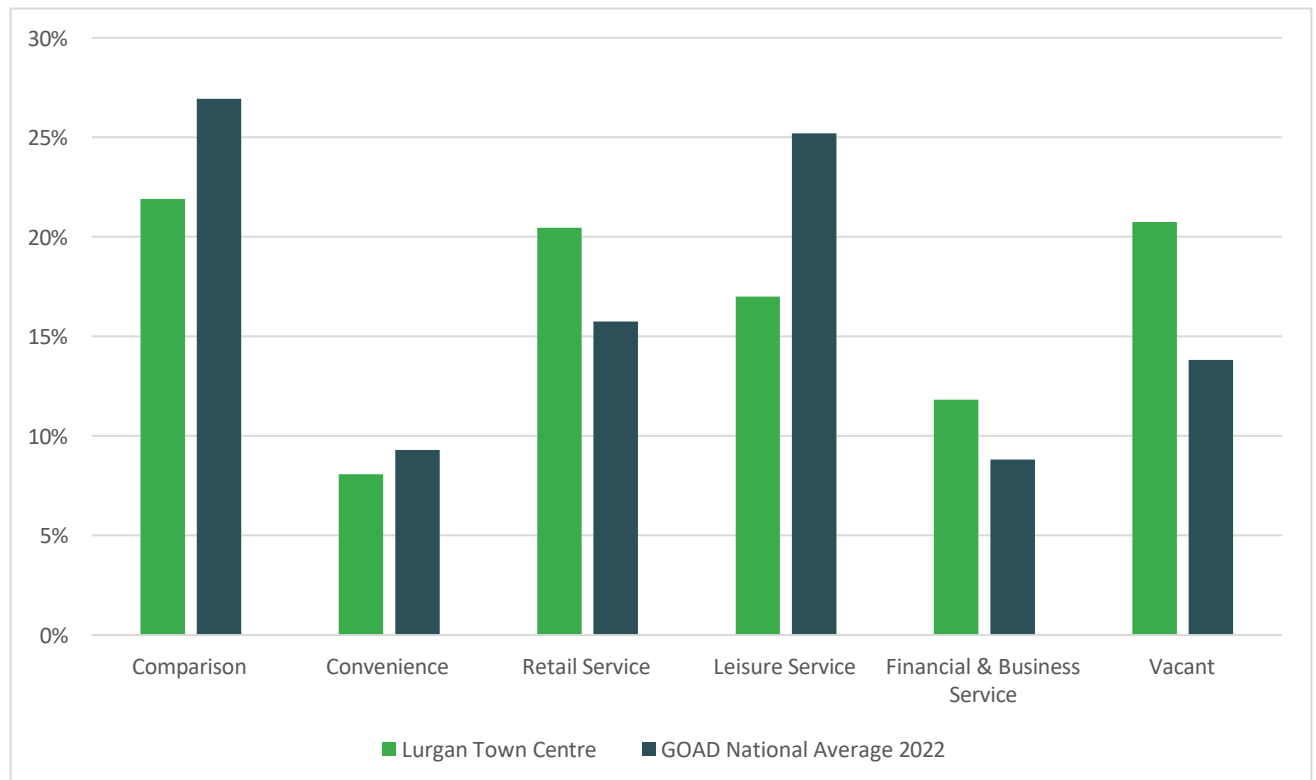
- 9.3 There is a total of 347 units in Lurgan Town Centre. These are primarily independent retailers, though some national retailers are also present. The offer is largely budget orientated; stakeholders suggested that higher quality retailers are needed, as well as a greater mix to cater for different budgets. The Centre is too spread out, therefore diluting its offer and could benefit from having a more compact retail core.
- 9.4 The comparison offer consists of 76 units, which makes up 21.9% of the total offer, which is significantly lower than the UK average of 26.9%. The comparison offer is fairly diverse, with shops selling clothes, furniture, jewellery, gifts, and cards, among others. Though these are mostly independent retailers, there are also some national retailers, such as Pound Stretcher, Boots, Hallmark and Superdrug.
- 9.5 The convenience offer consists of 28 units, which makes up 8.1% of the total offer, slightly lower than the UK average (9.3%). Lurgan has a selection of large chain supermarkets, such as Tesco, Lidl and Iceland, but there are also independent greengrocers, bakeries, butchers and delis.
- 9.6 Services make up 49.3% (171 units) of the total number of units, which is slightly less than the UK average (49.8%).
- Retail services make up 20.5% (71 units) of the total offer, a number much higher than the national average of 15.8%. The retail services on offer are fairly diverse, including hairdressers, beauty salons, tattoo studios, phone repair shops and travel agents.
  - Leisure services make up 17.0% (59 units) of the total number of units, approximately 8% short of the national average (25.2%). The offer mainly includes bars and takeaways and there are a few cafes and restaurants.
  - Financial & Business Services make up 11.8% (41 units), which is higher than the UK average of 8.8%. These are mostly estate agents, solicitors and banks.
- 9.7 Vacancies account for 72 units which makes up 20.7% of the total units, which is significantly higher than the UK average of 13.8%. Many of these vacancies are long-term and situated in heritage buildings.

Figure 9.7.1 Lurgan Town Centre Composition

| Categories                      | Lurgan Town Centre 2022 |        | UK Average 2022 |
|---------------------------------|-------------------------|--------|-----------------|
|                                 | (#)                     | (%)    | (%)             |
| Comparison                      | 76                      | 21.9%  | 26.9%           |
| Convenience                     | 28                      | 8.1%   | 9.3%            |
| Services (Total)                | 171                     | 49.3%  | 49.8%           |
| <i>Retail</i>                   | 71                      | 20.5%  | 15.8%           |
| <i>Leisure</i>                  | 59                      | 17.0%  | 25.2%           |
| <i>Financial &amp; Business</i> | 41                      | 11.8%  | 8.8%            |
| Vacant                          | 72                      | 20.7%  | 13.8%           |
| TOTAL                           | 347                     | 100.0% | 100.0%          |

Source: LPA Centre Survey, and Experian GOAD (for UK Average)

Figure 9.7.2 Composition of Lurgan Town Centre Compared to the UK Average



Source: LPA Centre Survey, and Experian GOAD (for UK Average)

## Environmental Quality

- 9.8 Lurgan contains a designated conservation area within the central core. The central island on Market Street has evidently benefited from recent investment, with seating areas, greenery and sculptures. However, during the site visit, it was observed that few people were utilising this central island, perhaps because there is heavy traffic on either side. Lurgan has benefited from a Townscape Heritage Scheme. This is a programme for the regeneration of historic urban environments and provides grants from a 'common fund' to property owners to carry out repair, restoration and refurbishment work to properties which contribute to the townscape character of an area.
- 9.9 Shopfronts in the town centre are quite mixed. While some look new and modern, most seem quite tired and outdated. There are also a number of visibly vacant units, which negatively affect the town centre's appearance. This is particularly evident on side streets.
- 9.10 Overall the centre is quite dominated by traffic, which makes for a noisy atmosphere and detracts from the centre's environmental quality.
- 9.11 The Centre is generally safe.

## Accessibility

- 9.12 Lurgan Centre appears to struggle with traffic and congestion. Along Market Street there are two lanes in either direction, resulting in a high number of cars passing through. The area surrounding Shankhill Parish Church is particularly congested. The town centre is in general very car-oriented, with ample on-street parking and car parks available. 91.0% of

respondents travel to the Centre by private vehicle, and 5.3% of respondents proposed more parking facilities as a measure which would encourage them to visit the Centre.

- 9.13 Lurgan train station offers routes to Belfast and Newry, though its connectivity to the core retail area could be improved. DfI have committed to an upgrade of Lurgan train station with an additional park & ride area. Bus stops along the main high street also provide services to nearby towns. Despite this, only 1.28% of respondents travel to Lurgan Centre by bus or train.
- 9.14 The Centre is fairly spread out and at places it is difficult to cross the street, hindering pedestrian movement. Pavements along Market Street are wide and newly paved, but pavements on side streets are narrower and less well-maintained.

## Markets and Events

- 9.15 Lurgan Market takes place in the Town Plaza and is held every Thursday between 9 am and 4 pm. It does not have a social media presence, but is referenced on other websites. Overall, the information available about it is somewhat limited. However, we understand that the market is very small, selling plants, rugs, cushions, coffee and cake. The experience overall is underwhelming and not vibrant.
- 9.16 A Christmas market is also held annually, and Brownlow House run markets in partnership with the community.
- 9.17 According to household survey responses, Lurgan Market is the fifth most popular market in the Study Area.

## Night Time Economy

- 9.18 Although there are some bars and restaurants which open in the evening, particularly in William Street / Church Place, the night time economy is limited.

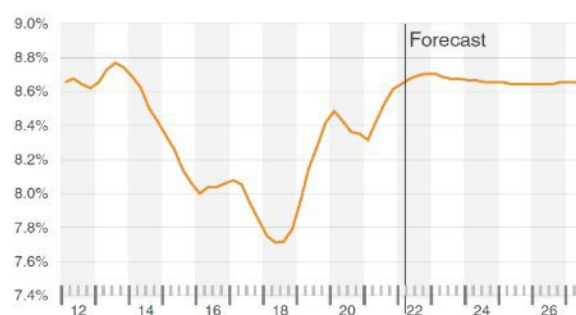
## Prime Rents and Yields

- 9.19 The CoStar Retail Report 2022 identifies the market rent per square foot to be £11.88 and identifies that market yield in Lurgan Town Centre is 8.7%.

Figure 9.19.1 Market Rent per SF for Lurgan Town Centre



Source: CoStar Retail Report 2022



## Commercial Demand

- 9.20 We have reviewed The Requirement List database to understand what operators seek representation in the respective centres. We have not identified any retailers that seek representation specifically in Lurgan Town Centre.

## Town Centre Turnover

| Category              | Town Centre Turnover (p/a) (£) | Town Centre Market Share from the Study Area (p/a) (%) |
|-----------------------|--------------------------------|--------------------------------------------------------|
| Convenience           | £94.1                          | 9.9%                                                   |
| Clothing & footwear   | £16.9                          | 4.4%                                                   |
| Furniture goods       | £11.1                          | 10.5%                                                  |
| DIY goods             | £4.6                           | 5.1%                                                   |
| Electrical goods      | £2.3                           | 1.7%                                                   |
| Small Household goods | £16.2                          | 6.8%                                                   |
| Small Media           | £4.8                           | 7.2%                                                   |
| Chemist goods         | £6.9                           | 9.4%                                                   |
| Recreation goods      | £10.1                          | 6.8%                                                   |
| <b>Total Retail</b>   | <b>£167.0</b>                  | -                                                      |

## Public Opinion

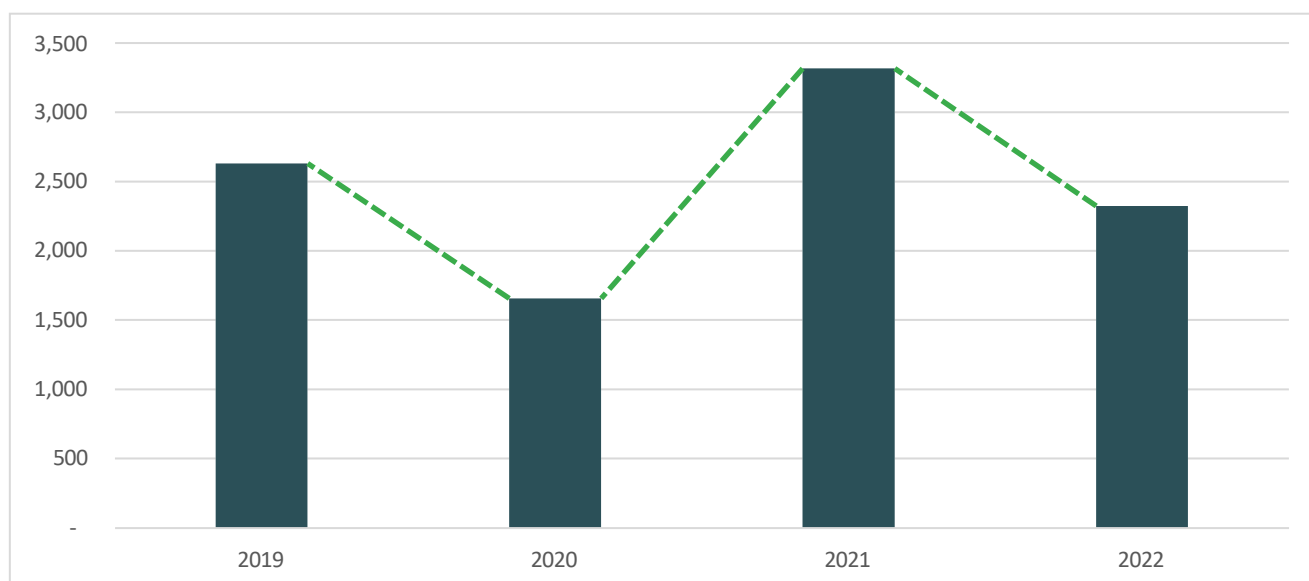
- 9.21 Looking at the market shares, in the Inner Study Area, for convenience shopping, with 16.2% Lurgan Town Centre is the most popular destination, followed by Banbridge out-of-centre destinations with 14.4%. For comparison shopping, with 9.4% Lurgan Town Centre sits below Craigavon Town Centre (23.4%), Portadown Town Centre (13.1%), Armagh City Centre (10.8%) and Banbridge Town Centre (10.0%).
- 9.22 According to household survey responses, the most popular features in Lurgan Centre are that it is close to home or work (29.0%) and that it has a good range of independent shops (14.5%).
- 9.23 In terms of key interventions, it was identified that Lurgan Centre should have an increased choice and range of available shops (15.0%), improved non-food shops in the centre (5.9%) and more parking facilities (5.3%).

## Footfall

- 9.24 Footfall in Lurgan Town Centre increased in 2021, but then decreased again in 2022. Between April 2019 and April 2022, footfall decreased by 11.8%; this is the biggest decrease in footfall experienced by any of the Main Town Centres.

Figure 9.24.1 Footfall figures for Lurgan, 2019 to 2022

| ABC Town / City Centre            | 2019  | 2020  | 2021  | 2022  | (%) Change from first count - 29/04/22 (+or-) |
|-----------------------------------|-------|-------|-------|-------|-----------------------------------------------|
| Lurgan (Market Street: 1 counter) | 2,631 | 1,656 | 3,316 | 2,324 | -11.8%                                        |



## Summary

9.25 There is a clear opportunity for the centre to grow/establish its USP, namely:

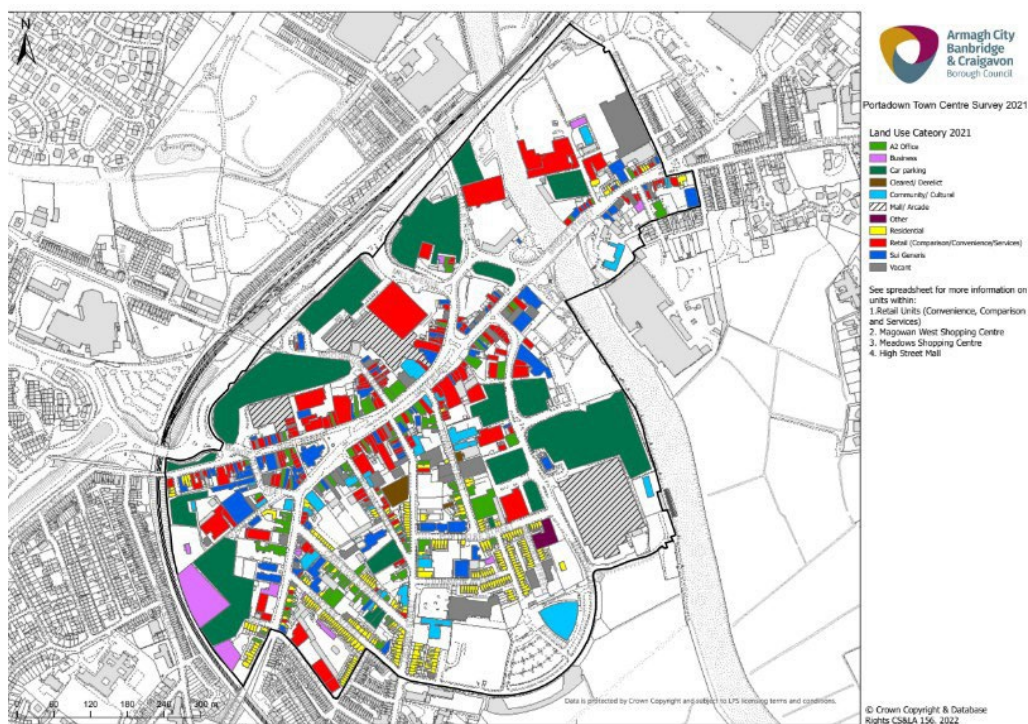
- a. Whilst the centre's night time economy is growing, it is still limited, not overly vibrant and could benefit from a more defined hub.
- b. The diversification of food and beverage offer could be beneficial.
- c. Better traffic and parking management system is needed.
- d. The centre lacks a focal point and a clear gateway.
- e. Efforts could be made to improve accessibility and movement around the centre for pedestrians. Better linkages to the train station are needed.
- f. A holistic strategy to tackle high vacancy rates is necessary.

## 10. Portadown Health Check

### Description

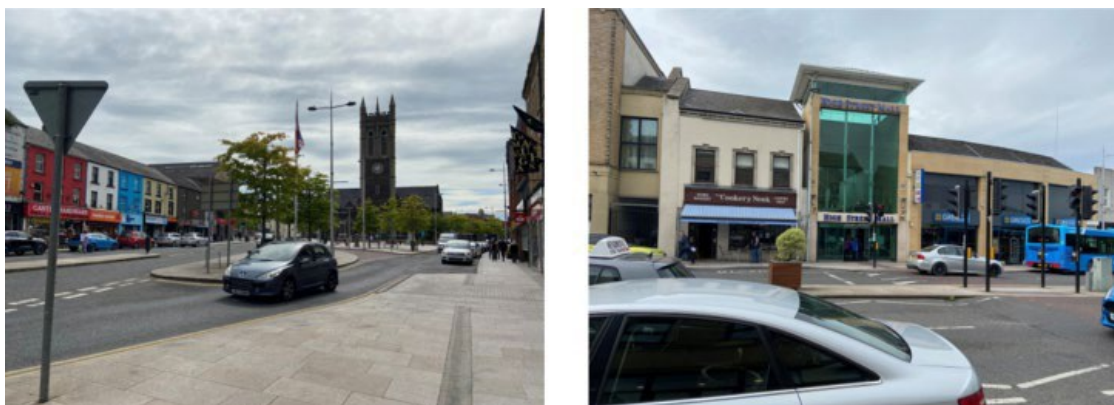
- 10.1 Portadown currently holds the status of a designated Town Centre.
- 10.2 Portadown forms part of the Craigavon Urban Area along with Lurgan and Central Craigavon. The Centre itself is large, composed primarily of the main high street (Market Street and High Street) and some side streets leading south. The Centre includes three shopping centres: Magowan West, High Street Mall and Meadows Shopping Centre.

Figure 10.2.1 Land Use Plan



Source: Armagh City, Banbridge and Craigavon Borough Council

Figure 10.2.2 Photos of Portadown Town Centre



Source: Nexus Site Visit (June 2022)

## Composition and Vacancies

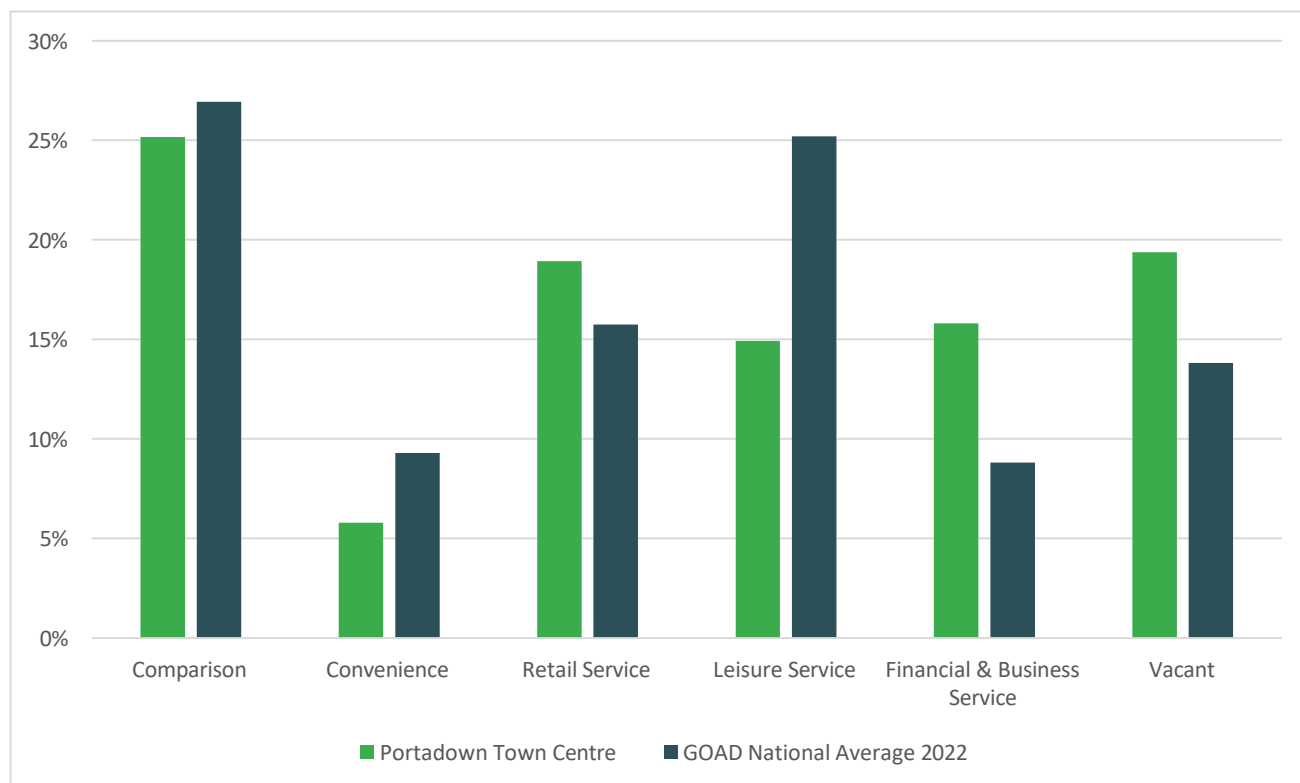
- 10.3 There are a total of 449 units in Portadown Town Centre. These are primarily independent retailers, with some national retailers also present. However, the range of shops available is limited considering the size of the Centre. Stakeholders highlighted that there is a lack of “big hitters” to generate footfall.
- 10.4 The comparison offer consists of 113 units, which makes up 25.2% of the total offer, which is lower than the UK average (26.9%). There is a mix of independent retailers and national retailers, such as Poundstretcher, United Colors of Benetton and Superdrug.
- 10.5 The convenience offer consists of 26 units, which makes up 5.8% of the total offer, lower than the UK average (9.3%). The convenience units on offer are primarily independents grocers, bakeries and butchers, but there are also Tesco, Lidl and Iceland stores.
- 10.6 Services make up 49.7% (223 units) of the total number of units, which is comparable to the UK average (49.8%).
- a. Retail services make up 18.9% (85 units) of the total offer, which is higher than the UK average of 15.8%. These units are primarily hairdressers, barbers and beauty salons.
  - b. Leisure services make up 14.9% (67 units) of the total number of units, which is significantly lower than the UK average of 25.2%. Stakeholders highlighted the lack of diversity in the leisure offer of the Centre, and the need for a hub. Though there are many cafes, there are few restaurants and no hotels.
  - c. Financial & Business Services make up 15.8% (71 units), which is significantly higher than that of the UK average of 8.8%.
- 10.7 Vacancies account for 87 units which makes up 19.4% of the total units, which is significantly higher than the UK average of 13.8%. The take-up of vacant properties in the Centre varies; some find new tenants quickly, whereas others have become long-term vacancies.

Figure 10.7.1 Portadown Town Centre Composition

| Categories           | Portadown Town Centre 2022 |       | UK Average 2022 |
|----------------------|----------------------------|-------|-----------------|
|                      | (#)                        | (%)   | (%)             |
| Comparison           | 113                        | 25.2% | 26.9%           |
| Convenience          | 26                         | 5.8%  | 9.3%            |
| Services (Total)     | 223                        | 49.7% | 49.8%           |
| Retail               | 85                         | 18.9% | 15.8%           |
| Leisure              | 67                         | 14.9% | 25.2%           |
| Financial & Business | 71                         | 15.8% | 8.8%            |
| Vacant               | 87                         | 19.4% | 13.8%           |
| TOTAL                | 449                        | 100%  | 100.0%          |

Source: LPA Centre Survey, and Experian GOAD (for UK Average)

Figure 10.7.2 Composition of Portadown Town Centre Compared to the UK Average



Source: LPA Centre Survey, and Experian GOAD (for UK Average)

## Environmental Quality

- 10.8 Stakeholders identified the environmental quality of Portadown Centre as an area of improvement, as streets are not cleaned sufficiently and there is a graffiti problem. It was suggested that the Centre would benefit from more proactive cleaning and better provision of bins.
- 10.9 Magowan West has a modern appearance and appears well cared for. The décor of Meadows Shopping Centre and High Street Arcade are more dated. In High Street Arcade in particular, the high number of vacancies gives the shopping centre a rundown appearance.
- 10.10 The Centre is generally safe, though there is some anti-social behaviour, particularly in the evenings.
- 10.11 The riverside was identified as an underutilised area and it was suggested that it presented an opportunity for a culture and entertainment based hub. However, there is a significant portion of the riverside area that fall within the 1:100 year Bann River climate change floodplain which would restrict opportunities for redevelopment.
- 10.12 The centre also benefits from the Portadown Canal Towpath (which begins at Bann Bridge) which is used for informal recreation.

## Accessibility

- 10.13 The vast majority of survey respondents (95.3%) travel to the Centre via private vehicle. Traffic levels are relatively high. Car parking is available both on-street and in large car parks throughout the Centre. However, household survey respondents identified the current provision of car parking as a feature that could be improved.
- 10.14 Portadown benefits from a centrally located train station, though stakeholders suggested that this could have better connectivity to the retail core. A gateway enhancement scheme has recently improved the linkage between the train station and Woodhouse Street / Magowan West in the town centre. Bus stops throughout the Centre also provide regular services to other large towns across the Borough and beyond.
- 10.15 The Centre is relatively spread out, which may cause issues for those who are less physically able. While the pavements on the high street are wide, pavements on the side streets are less so. Due to the width of the high street, it is difficult to cross without the use of designated pedestrian crossings.
- 10.16 It should be noted that 2021 the Council has consulted on a Gateway Enhancement Project for the arrival into the town centre from Portadown Train Station, Woodhouse Street and Obins Street.

## Markets and Events

- 10.17 Portadown eco market (also known as the Sustain Market) specialises in supporting local green businesses and takes place four times a year in Millennium Court, located on William Street. The market offers organically grown food, a place for people to showcase their work and even a plant swap service. The market benefits from a social media page and is referenced by other websites. According to household survey responses, this is the fourth most popular market in the Study Area. A market also takes place in the carpark at Magowan West.
- 10.18 It should be noted that 2021 the Council has consulted on the possibility of introducing a new open-air market at Magowan west Car Park.
- 10.19 The Country Comes to Town Heritage Festival Day takes place yearly in September. The festival includes, vintage vehicles, country music, walkabout performance, traditional crafts such as blacksmithing and wood-turning, performing arts, food traders and demonstrations.
- 10.20 Portadown Boat Club Regatta is an annual event that takes place in May.

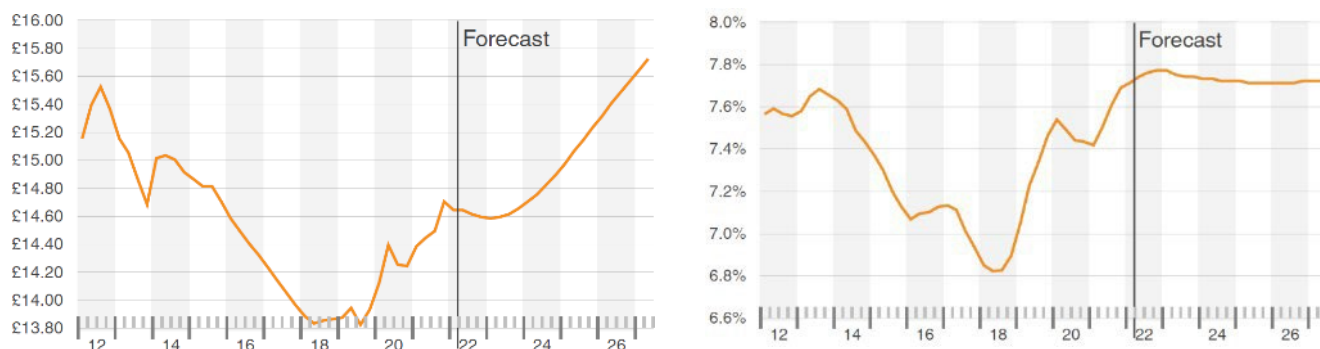
## Night Time Economy

- 10.21 The Centre's night time economy is limited, as most shops are shut by 6pm. There is a small night time economy cluster near West Street and Mandeville Street, where there are some restaurants that stay open into the evening.

## Prime Rents and Yields

- 10.22 The CoStar Retail Report 2022 identifies the market rent per square foot to be £14.64 and identifies that market yield in Portadown Town Centre is 7.7%.

Figure 10.22.1 Market Rent per SF and Market Yield for Portadown Town Centre



Source: CoStar Retail Report 2022

## Commercial Demand

- 10.23 We have reviewed The Requirement List database to understand what operators seek representation in the respective centres. We have identified one operator that seeks representation specifically in Portadown Town Centre.

Figure 10.23.1 Operator Requirement List for Portadown

| Occupier                | Description           | Size (min) sq ft | Size (max) sq ft |
|-------------------------|-----------------------|------------------|------------------|
| City Electrical Factors | Electrical Wholesaler | 2,750            | 6,000            |

Source: The Requirement List (June 2022)

## Town Centre Turnover

| Category              | Town Centre Turnover (p/a) (£) | Town Centre Market Share from the Study Area (p/a) (%) |
|-----------------------|--------------------------------|--------------------------------------------------------|
| Convenience           | £54.0                          | 5.7%                                                   |
| Clothing & footwear   | £28.2                          | 7.4%                                                   |
| Furniture goods       | £12.4                          | 11.7%                                                  |
| DIY goods             | £6.1                           | 6.8%                                                   |
| Electrical goods      | £6.4                           | 4.8%                                                   |
| Small Household goods | £20.1                          | 8.5%                                                   |
| Small Media           | £8.7                           | 13.1%                                                  |
| Chemist goods         | £6.0                           | 8.2%                                                   |
| Recreation goods      | £15.1                          | 10.2%                                                  |
| <b>Total Retail</b>   | <b>£156.8</b>                  | -                                                      |

## Public Opinion

- 10.24 Looking at the market shares, in the Inner Study Area, Portadown TC draws 9.2% of convenience trade, sitting below Lurgan TC (16.2%) and Armagh CC (11.3%). However, it is also outperformed by its out-of-centre destinations (9.6%); as

well as Banbridge out-of-centre destinations (14.4%). For comparison shopping with 13.1%, Portadown TC sits in second place below Craigavon TC (23.4%).

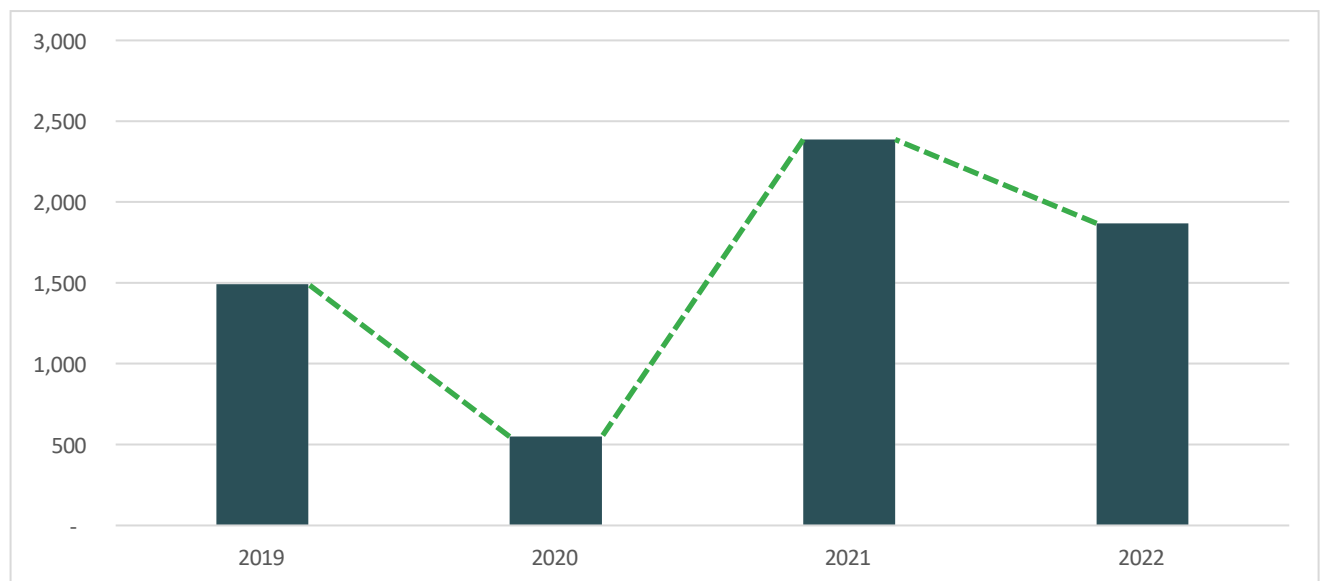
- 10.25 According to the household survey, the most popular features of Portadown Centre is that it is close to home or work (27.4%), its choice and range of retail shops (17.2%) and its range of independent shops (9.2%).
- 10.26 Most of the interventions suggested by respondents relate to the Centre's retail offer, including an increased choice of shops (9.1%), improved non-food shops in the Centre (5.2%), and improved quality of shops (4.9%).

## Footfall

- 10.27 Footfall in Portadown TC was highest in 2021, but then decreased again in 2022. However, over the period 2019 to 2022, Portadown still experienced a footfall increase of 25.1%, the highest of any of the Main Town Centres.

Figure 10.27.1 Footfall figures for Portadown, 2019 to 2022

| ABC Town / City Centre             | 2019  | 2020 | 2021  | 2022  | (%) Change from first count - 29/04/22 (+or-) |
|------------------------------------|-------|------|-------|-------|-----------------------------------------------|
| Portadown (West Street: 1 counter) | 1,493 | 549  | 2,387 | 1,868 | 25.1%                                         |



## Summary

- 10.28 There is a clear opportunity for the centre to grow its USP, namely:
- a. Whilst the centre has a comparison offer is not particularly diverse and could be improved further.
  - b. Whilst the centre's night time economy is growing, it is still limited, not overly vibrant and could benefit from a more defined hub. The leisure offer needs qualitative and quantitative improvement;
  - c. The centre could benefit from better marketing.

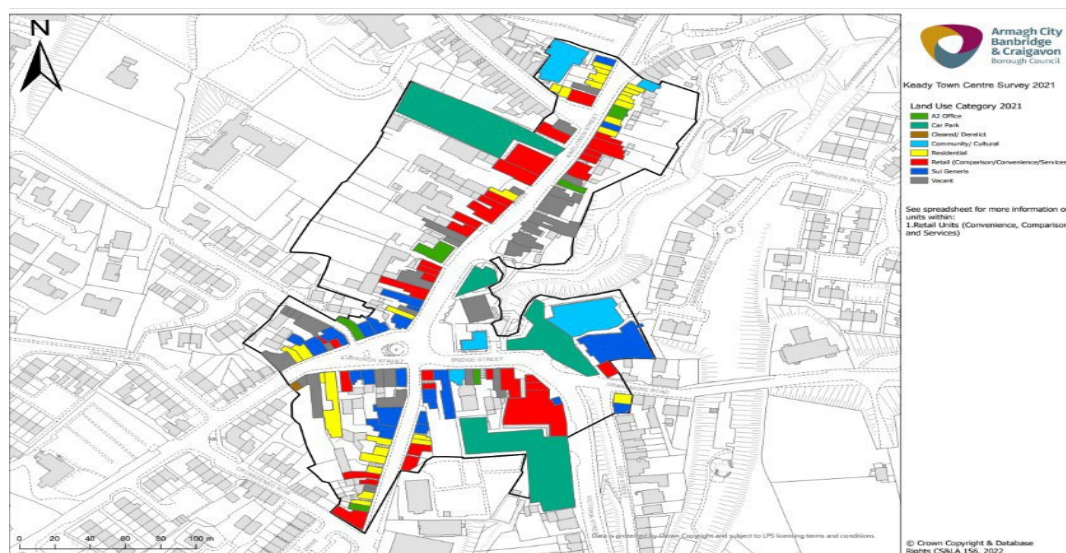
- d. Build on the success of the eco market would be beneficial.
- e. A better parking management system is needed.
- f. Better linkages to the train station are needed.
- g. The river is a natural asset which is currently underutilised.
- h. A holistic strategy to tackle high vacancy rates is necessary.

## 11. Keady Health Check

### Description

- 11.1** In the settlement hierarchy Keady is a local town (designated by Armagh Area Plan (AAP) 2004) in the south-west of the Study Area. It does not currently have a designated town centre boundary. However, the AAP 2004 details a shopping area (with number of typical town centre uses) at the intersection of Bridge Street, Kinelowen Street, Davis Street and Church Street. Points of interest include the Tommy Maken Arts and Community Centre and the Old Mill.
- 11.2** Please note that the Town Centre boundary shown below was to allow Keady central area land use to be surveyed. The interim Town Centre boundary is indicative only and consultation on a proposed boundary will follow in the LDP.

Figure 11.2.1 Land Use Plan (NB – the TC boundary shown below is an interim boundary for landuse surveying purposes).



Source: Armagh City, Banbridge and Craigavon Borough Council

Figure 11.2.2 Photos of Keady Local Town Centre



Source: Nexus Site Visit (June 2022)

## Composition and Vacancies

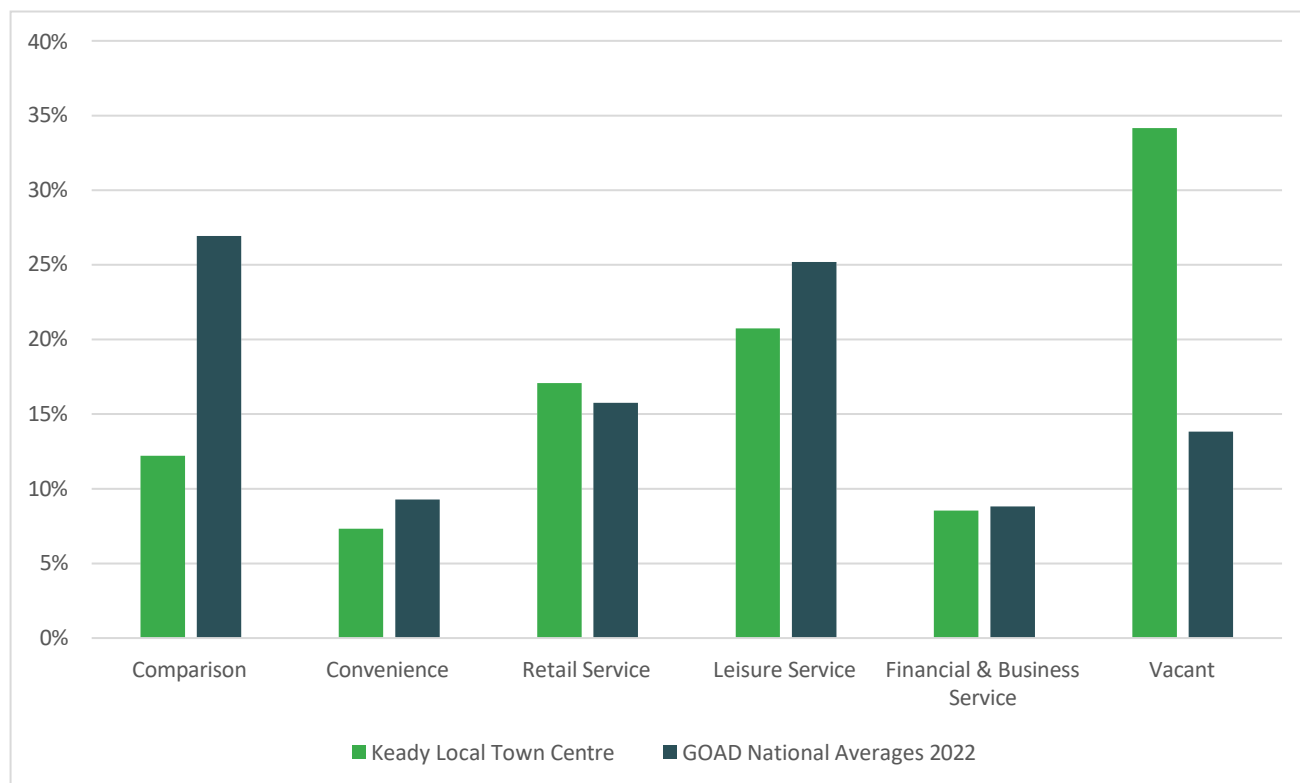
- 11.3 There is a total of 81 units in Keady. These are primarily independent retailers, and largely cater to the basic needs of the local community.
- 11.4 The comparison offer consists of 10 units, which makes up 12.2% of the total offer, which is considerably lower than the UK average of 26.9%. The comparison units include a pharmacy, a household goods shop and a gift shop.
- 11.5 The convenience offer consists of six units, which makes up 7.3% of the total offer, lower than the UK average (9.3%). These include a butcher, a baker, an off-licence and a supermarket.
- 11.6 Services make up 46.3% (38 units) of the total number of units, which is lower than the UK average (49.8%).
- a. Retail services make up 17.1% (14 units) of the total offer, which is slightly higher than the UK average of 15.8%. The existing offer consists primarily of hairdressers and barbers, but also a funeral director and a phone repair shop.
  - b. Leisure services make up 20.7% (17 units) of the total number of units, which is lower than the UK average of 25.2%. The offer mainly includes bars and takeaways.
  - c. Financial & Business Services make up 8.5% (seven units), which is slightly below that of the UK average of 8.8%.
- 11.7 Vacancies account for 28 units which makes up 34.1% of the total units, which is more than double the UK average of 13.8%.

Figure 11.7.1 Keady Composition (Units)

| Categories                      | Keady Shopping Area 2022 |        | UK Average 2022 |
|---------------------------------|--------------------------|--------|-----------------|
|                                 | (#)                      | (%)    | (%)             |
| Comparison                      | 10                       | 12.2%  | 26.9%           |
| Convenience                     | 6                        | 7.3%   | 9.3%            |
| Services (Total)                | 38                       | 46.3%  | 49.8%           |
| <i>Retail</i>                   | 14                       | 17.1%  | 15.8%           |
| <i>Leisure</i>                  | 17                       | 20.7%  | 25.2%           |
| <i>Financial &amp; Business</i> | 7                        | 8.5%   | 8.8%            |
| Vacant                          | 28                       | 34.1%  | 13.8%           |
| TOTAL                           | 81                       | 100.0% | 100.0%          |

Source: LPA Centre Survey, and Experian GOAD (for UK Average)

Figure 11.7.2 Composition of Keady Compared to the UK Average



Source: LPA Centre Survey, and Experian GOAD (for UK Average)

## Environmental Quality

- 11.8** Shopfronts are fairly well-kept but generally outdated. There are several prominent vacant units which detract from the appearance of the shopping area. On the corner of Bridge Street and Kinelowen Street, there is a paved area with greenery and benches but other than this, there is little street furniture or objects of interest in the shopping area.
- 11.9** The shopping area also offers access to Keady Glen, a pleasant green space situated along the River Clea.

## Accessibility

- 11.10** Keady experiences high levels of through traffic. 88.2% of respondents travel to the shopping area by private vehicle.
- 11.11** Public transport connectivity is poor. Although there are bus routes linking Armagh and Keady, the services are limited.
- 11.12** 11.8% of respondents travel to the Keady on foot. Due to the compact nature of the Keady's shopping area, pedestrian movement is relatively easy, although designated crossing places for pedestrians are limited. Pavements are also fairly narrow, restricting pedestrian accessibility.

## Markets and Events

- 11.13** Keady's shopping area does not benefit from a market, nor other regular events.

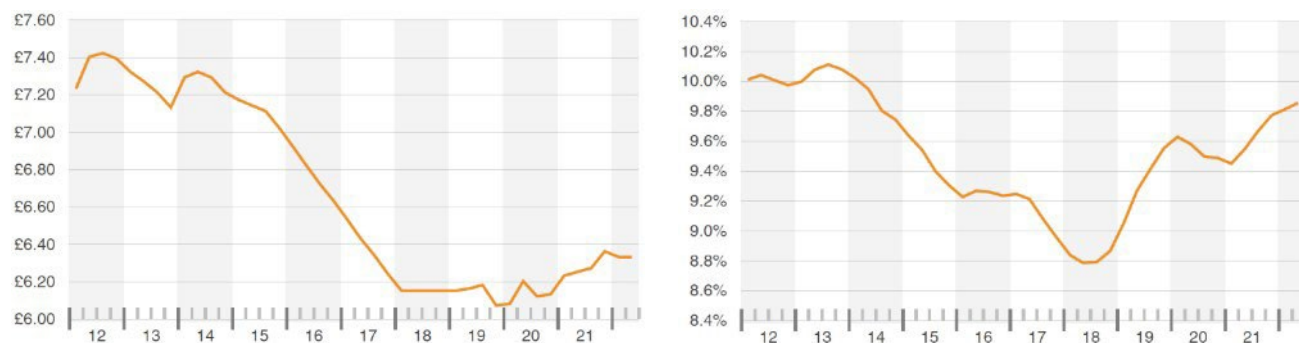
## Night Time Economy

- 11.14 The night time economy is very limited. There are a few bars that stay open into the evening, but no restaurants. However, the Tommy Makem Centre does offer a venue to host concerts, classes and community meetings.

## Prime Rents and Yields

- 11.15 The CoStar Retail Report 2022 identifies the market rent per square foot to be £6.33 and identifies that market yield in Keady is 9.9%.

Figure 11.15.1 Market Rent per SF for Keady



Source: CoStar Retail Report 2022

## Commercial Demand

- 11.16 We have reviewed The Requirement List database to understand what operators seek representation in the respective centres. We have not identified any retailers that seek representation specifically in Keady.

## Keady Shopping Area Turnover

| Category              | Turnover (p/a) (£) | Market Share from the Study Area (p/a) (%) |
|-----------------------|--------------------|--------------------------------------------|
| Convenience           | £5.3               | 0.6%                                       |
| Clothing & footwear   | £0.4               | 0.1%                                       |
| Furniture goods       | £0.2               | 0.2%                                       |
| DIY goods             | £1.4               | 1.6%                                       |
| Electrical goods      | £3.5               | 2.6%                                       |
| Small Household goods | £1.6               | 0.7%                                       |
| Small Media           | £0.1               | 0.1%                                       |
| Chemist goods         | £1.0               | 1.4%                                       |
| Recreation goods      | £0.6               | 0.4%                                       |
| <b>Total Retail</b>   | <b>£14.1</b>       | -                                          |

## Public Opinion

- 11.17 56.6% of survey respondents named Keady's proximity to home and work as an attractive feature. Conversely, only 12.5% named the choice and range of retail shops as a feature they enjoyed about Keady. Together, this suggests that respondents primarily visit Keady because it is convenient, rather than the strength of its retail offer.
- 11.18 8.4% of respondents named an increased choice of shops and 7.8% of respondents named more financial services as measures which would encourage them to visit Keady. 8.0% also asked for more parking facilities.

## Summary

- 11.19 The convenience and comparison offer caters for basic, local needs only.
- 11.20 The leisure services offer could be improved, with the overall number of units being much below the national average. The offer mainly includes bars and takeaways, and hence a greater variety would be beneficial.
- 11.21 Keady experiences high vacancy levels, including large, centrally located properties. This detracts from the environmental quality.
- 11.22 Keady is accessible by car and allows for fairly easy movement by pedestrians, but public transport connections could be greatly improved.

## 12. Markethill Health Check

### Description

- 12.1 In the settlement hierarchy Markethill is a local town (designated by Armagh Area Plan (AAP) 2004) located to the south-east of Armagh. It does not currently have a designated town centre boundary. However, the AAP 2004 details a shopping area (with number of typical town centre uses) along Mowhan Road and Main Street.
- 12.2 Please note that the Town Centre boundary shown below was to allow Markethill central area land-use to be surveyed. The interim Town Centre boundary is indicative only and consultation on a proposed boundary will follow in the LDP.

Figure 12.2.1 Land Use Plan (NB – the TC boundary shown below is an interim boundary for landuse surveying purposes)



Source: Armagh City, Banbridge and Craigavon Borough Council

Figure 12.2.2 Photos of Markethill Local Town Centre



Source: Nexus Site Visit (June 2022)

## Composition and Vacancies

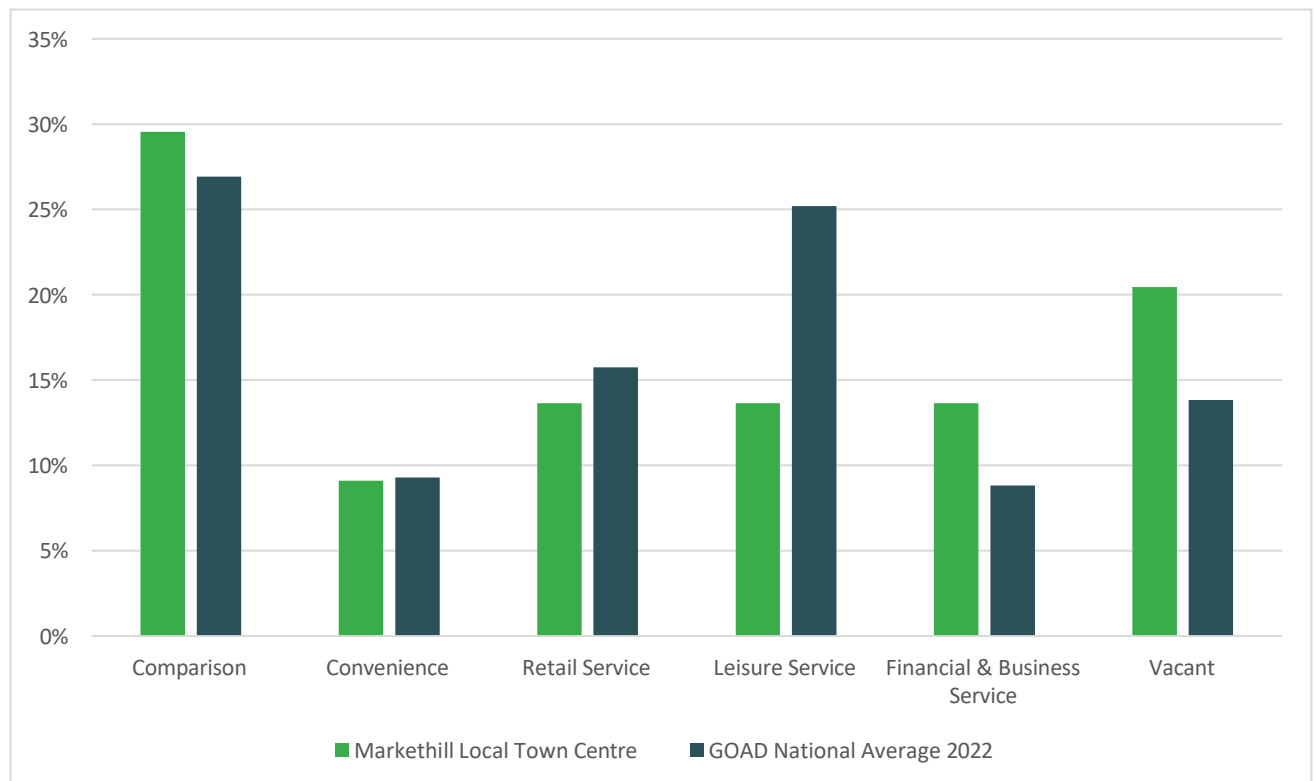
- 12.3 There is a total of 44 units in Markethill. These are primarily independent retailers.
- 12.4 The comparison offer consists of 13 units, which makes up 29.5% of the total offer, which is above the UK average of 26.9%. The comparison offer includes a furniture shop, an appliance shop, a pharmacy, charity shops, clothing shops and hardware shops.
- 12.5 The convenience offer consists of four units, which makes up 9.1% of the total offer, similar to the UK average (9.3%). This consists of a medium-sized supermarket, a convenience store, a butchers and bakery.
- 12.6 Services make up 40.9% (18 units) of the total number of units, which is significantly below the UK average (49.8%).
- a. Retail services make up 13.6% (six units) of the total offer, which is 2 percent lower than the UK average of 15.8%. The retail services on offer include two hairdressers, a beauty salon, an opticians, a pet groomer and a tyre fitters.
  - b. Leisure services make up 13.6% (six units) of the total number of units, which is significantly lower than the UK average of 25.2%. The offer consists of two takeaways, two cafes, a pub and a bookmakers.
  - c. Financial & Business Services make up 13.6% (six units), which is higher than that of the UK average of 8.8%.
- 12.7 Vacancies account for nine units which makes up 20.5% of the total units, which is significantly higher than the UK average of 13.8%.

Figure 12.7.1 Markethill Composition

| Categories           | Markethill 2022 |        | UK Average 2022 |
|----------------------|-----------------|--------|-----------------|
|                      | (#)             | (%)    | (%)             |
| Comparison           | 13              | 29.5%  | 26.9%           |
| Convenience          | 4               | 9.1%   | 9.3%            |
| Services (Total)     | 18              | 40.9%  | 49.8%           |
| Retail               | 6               | 13.6%  | 15.8%           |
| Leisure              | 6               | 13.6%  | 25.2%           |
| Financial & Business | 6               | 13.6%  | 8.8%            |
| Vacant               | 9               | 20.5%  | 13.8%           |
| TOTAL                | 44              | 100.0% | 100.0%          |

Source: LPA Centre Survey, and Experian GOAD (for UK Average)

Figure 12.7.2 Composition of Markethill Compared to the UK Average



Source: LPA Centre Survey, and Experian GOAD (for UK Average)

## Environmental Quality

- 12.8 Shopfronts are generally well-kept and there are many examples of modern and attractive frontages. The high street is a largely pleasant atmosphere, with trees, benches and traditional lampposts.
- 12.9 18.1% of survey respondents named environmental factors as a highlight of Markethill shopping area.
- 12.10 Markethill shopping area is considered to be safe.

## Accessibility

- 12.11 100% of survey respondents travel to Markethill by private vehicle. 21.0% of respondents named the convenience of car parking as an attractive feature of Markethill.
- 12.12 Bus stops on Main Street provide routes to Armagh and Newry, although services are infrequent.
- 12.13 Pedestrian movement around the Markethill shopping area is aided by its compact nature and wide pavements on Main Street. Though there is only one designated pedestrian crossing, traffic levels are low so it is relatively easy to cross the street.

## Markets and Events

- 12.14 The Markethill shopping area does not benefit from a market, nor other regular events.

## Night Time Economy

- 12.15 The night time economy in Markethill shopping area is extremely limited, as nearly all units close before the evening.

## Prime Rents and Yields

- 12.16 CoStar data on rents and yields unavailable for Markethill shopping area.

## Commercial Demand

- 12.17 We have reviewed The Requirement List database to understand what operators seek representation in the respective centres. We have not identified any retailers that seek representation specifically in Markethill.

## Markethill Shopping Area Turnover

| Category              | Turnover (p/a) (£) | Market Share from the Study Area (p/a) (%) |
|-----------------------|--------------------|--------------------------------------------|
| Convenience           | £10.4              | 1.1%                                       |
| Clothing & footwear   | £0.6               | 0.2%                                       |
| Furniture goods       | £2.1               | 2.0%                                       |
| DIY goods             | £0.2               | 0.3%                                       |
| Electrical goods      | £9.2               | 6.9%                                       |
| Small Household goods | £3.2               | 1.3%                                       |
| Small Media           | £0.3               | 0.4%                                       |
| Chemist goods         | £0.5               | 0.7%                                       |
| Recreation goods      | £0.2               | 0.1%                                       |
| <b>Total Retail</b>   | <b>£26.7</b>       | -                                          |

## Public Opinion

- 12.18 According to household survey responses, the most popular features of Markethill are that it is close to home and work (24.5%), and that its car parking is convenient (21.0%). Environmental factors, such as a nice atmosphere and being quiet, were also mentioned as highlights.

## Summary

- 12.19 Markethill caters primarily for the local community's basic needs.
- 12.20 Its comparison offer is fairly strong, as it sells a range of different goods and includes some higher end, upmarket shops.
- 12.21 The convenience offer is somewhat limited in that it lacks a large supermarket, although it has a medium-sized supermarket and some specialist stores which can provide essentials for the local population.

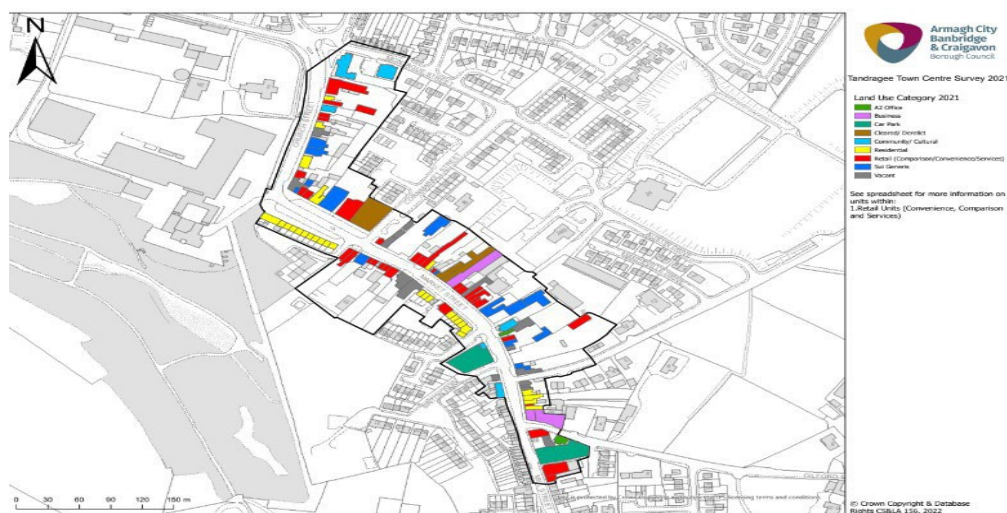
- 12.22 The leisure service offer is very limited and as such cannot support a strong night time economy.
- 12.23 Vacancy rates are high.
- 12.24 Environmental quality is generally high. There is also relatively little traffic, which makes for a calm and quiet environment.
- 12.25 Markethill shopping area is fairly accessible by car, and good parking is available. Pedestrian movement is also relatively easy, due to its compact nature and wide pavements. Access via public transport is extremely limited but the town is served by the Armagh City to Newry City bus service.

## 13. Tandragee Health Check

### Description

- 13.1 In the settlement hierarchy Tandragee is a local town (designated by Armagh Area Plan (AAP) 2004) located on the A27, in the middle of the Study Area. It does not currently have a designated town centre boundary. However, the AAP 2004 details a shopping area (with number of typical town centre uses) around its main high street (Church Street and Market Street).
- 13.2 Please note that the Town Centre boundary shown below was to allow Tandragee central area land use to be surveyed. The interim Town Centre boundary is indicative only and consultation on a proposed boundary will follow in the LDP.

Figure 13.2.1 Land Use Plan (NB – the TC boundary shown below is an interim boundary for the purposes of landuse surveying purposes)



Source: Armagh City, Banbridge and Craigavon Borough Council

Figure 13.2.2 Photos of Tandragee Local Town Centre



Source: Nexus Site Visit (June 2022)

## Composition and Vacancies

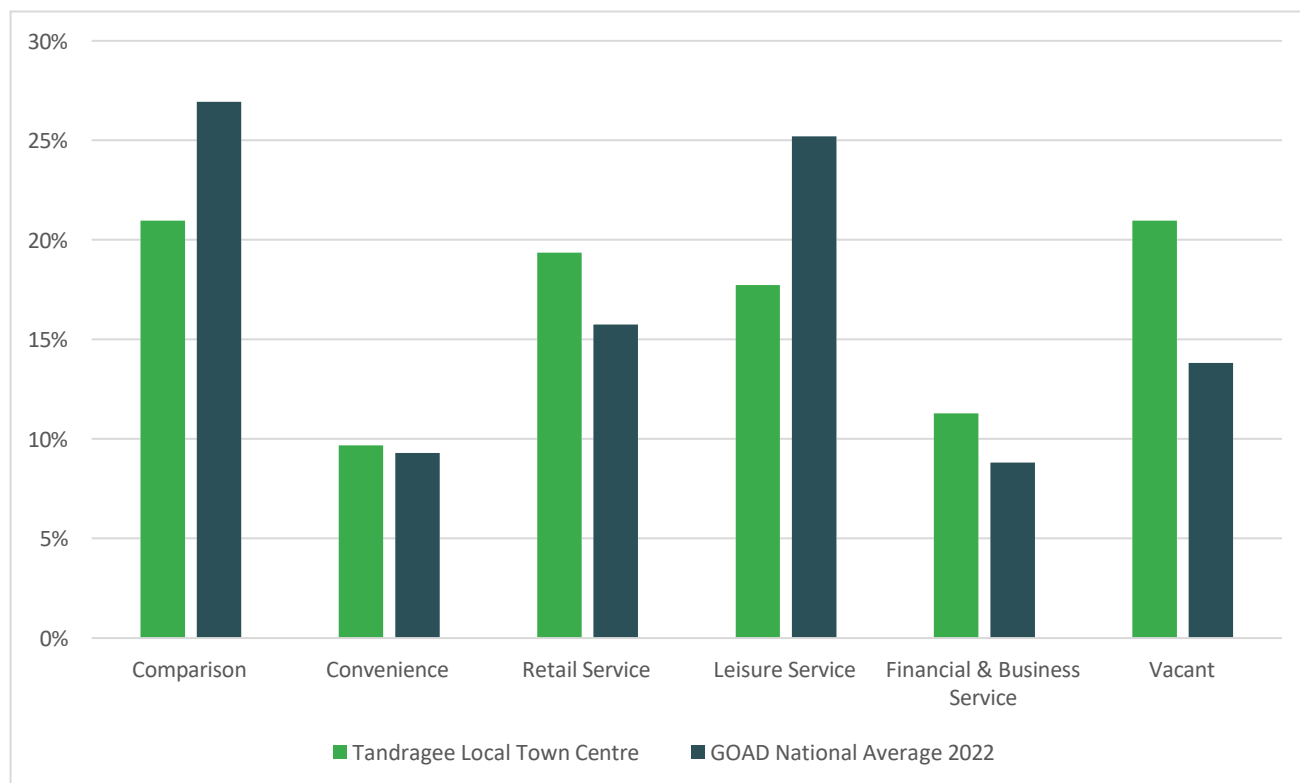
- 13.3 There is a total of 62 units in Tandragee shopping area.
- 13.4 The comparison offer consists of 13 units, which makes up 21.0% of the total offer, which is significantly lower than the UK average of 26.9%. These units are all independent retailers and include clothes shops, a shoe shop and a jeweller.
- 13.5 The convenience offer consists of six units, which makes up 9.7% of the total offer, slightly higher than the UK average (9.3%). These include two convenience stores, two off licences, a grocers and butchers. A larger supermarket is noticeably absent from the Tandragee shopping area.
- 13.6 Services make up 48.4% (30 units) of the total number of units, which is slightly below the UK average (49.8%).
- a. Retail services make up 19.4% (12 units) of the total offer, which is higher than the UK average of 15.8%. These units are primarily hairdressers and beauty salons, but there is also a shoe repair shop and travel agents.
  - b. Leisure services make up 17.7% (11 units) of the total number of units, which is significantly less than the UK average of 25.2%. The offer is limited in that most units are takeaways, and there are no cafes or restaurants.
  - c. Financial & Business Services make up 11.3% (seven units), which is higher than that of the UK average of 8.8%.
- 13.7 Vacancies account for 13 units which makes up 21.0% of the total units, which is considerably higher than the UK average of 13.8%. Many of these vacancies are long-term.

Figure 13.7.1 Tandragee Composition

| Categories           | Tandragee 2022 |        | UK Average 2022 |
|----------------------|----------------|--------|-----------------|
|                      | (#)            | (%)    | (%)             |
| Comparison           | 13             | 21.0%  | 26.9%           |
| Convenience          | 6              | 9.7%   | 9.3%            |
| Services (Total)     | 30             | 48.4%  | 49.8%           |
| Retail               | 12             | 19.4%  | 15.8%           |
| Leisure              | 11             | 17.7%  | 25.2%           |
| Financial & Business | 7              | 11.3%  | 8.8%            |
| Vacant               | 13             | 21.0%  | 13.8%           |
| TOTAL                | 62             | 100.0% | 100.0%          |

Source: LPA Centre Survey, and Experian GOAD (for UK Average)

Figure 13.7.2 Composition of Tandragee Compared to the UK Average



Source: LPA Centre Survey, and Experian GOAD (for UK Average)

## Environmental Quality

- 13.8** The Tandragee shopping area is overall very quiet, with few pedestrians and shoppers. According to stakeholders, the Tandragee shopping area suffers from a lack of investment. Although the Tandragee shopping area is small, it lacks the quaint nature that many towns of a similar size have.
- 13.9** There are relatively few objects of interest on the high street and limited street furniture, perhaps due to the on-street car parking alongside the pavements. Greenery along the high street is limited, though there are pleasant, well-maintained green spaces to the north and south of the Tandragee shopping area.
- 13.10** Shopfronts are generally dated, though well-kept. There are a number of vacant properties which have been poorly boarded up and detract from the appearance of the Tandragee shopping area. Otherwise, Tandragee shopping area is clean and relatively free of litter and graffiti.
- 13.11** The Tandragee shopping area is considered a safe environment.

## Accessibility

- 13.12** 100% of respondents to the household survey travel to the Tandragee shopping area by private vehicle. Due to its position on the A27, Tandragee experiences high levels of through traffic. On-street parking is available along the high street, and there is a car park on Market Street. However, stakeholders suggested that a better parking management system is needed.

- 13.13 Public transport access to the Tandragee shopping area is available via bus stops along Church Street and Market Street (Portadown-Newry bus service), but these services are infrequent.
- 13.14 There were relatively few shoppers and pedestrians present during the site visit. Narrow, steep pavements somewhat hinder pedestrian movement. There are also few pedestrian crossings, making it difficult to cross the street.

### Markets and Events

- 13.15 Tandragee shopping area does not benefit from a market, nor other regular events.

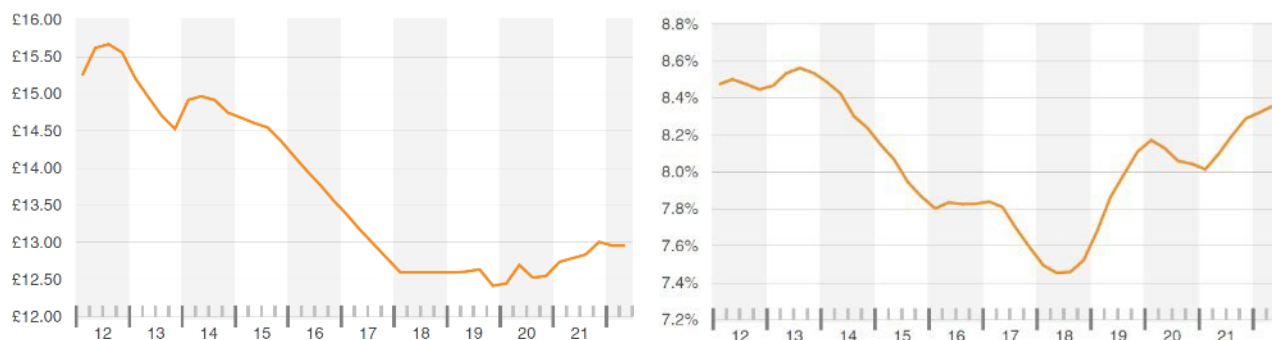
### Night Time Economy

- 13.16 The night time economy in Tandragee shopping area is extremely limited, as units tend to close before 6pm.

### Prime Rents and Yields

- 13.17 The CoStar Retail Report 2022 identifies the market rent per square foot to be £12.95 and identifies that market yield in Tandragee shopping area is 8.4%.

Figure 13.17.1 Market Rent per SF and Market Yield for Tandragee shopping area



Source: CoStar Retail Report 2022

### Commercial Demand

- 13.18 We have reviewed The Requirement List database to understand what operators seek representation in the respective centres. We have not identified any retailers that seek representation specifically in Tandragee.

### Tandragee Shopping Area Turnover

| Category            | Turnover (p/a) (£) | Market Share from the Study Area (p/a) (%) |
|---------------------|--------------------|--------------------------------------------|
| Convenience         | £4.0               | 0.4%                                       |
| Clothing & footwear | £3.0               | 0.8%                                       |
| Furniture goods     | £0.0               | 0.0%                                       |
| DIY goods           | £0.2               | 0.2%                                       |
| Electrical goods    | £0.0               | 0.0%                                       |

|                       |             |          |
|-----------------------|-------------|----------|
| Small Household goods | £0.1        | 0.1%     |
| Small Media           | £0.2        | 0.3%     |
| Chemist goods         | £0.9        | 1.3%     |
| Recreation goods      | £0.0        | 0.0%     |
| <b>Total Retail</b>   | <b>£8.4</b> | <b>-</b> |

## Public Opinion

- 13.19 According to the household survey, the most popular feature of Tandragee shopping area is that it is close to home or work (37.1%).
- 13.20 In terms of measures which could encourage more visits to the Tandragee shopping area, respondents to the household survey suggested a greater range of shops (19.2%) and improved non-food shops.

## Summary

- 13.21 Tandragee's retail offer is fairly limited. The convenience offer, in particular, is lacking a large supermarket.
- 13.22 The high number of vacancies is an issue, as they detract from the environmental quality. Concealing these vacancies could improve the Tandragee shopping area and create a more pleasant atmosphere.
- 13.23 Tandragee experiences high levels of traffic and parking can be an issue. Improving the parking management system could alleviate this problem and encourage more visitors.
- 13.24 The overall atmosphere is quiet. Investment could encourage a busier and more vibrant environment.

## 14. Dromore Health Check

### Description

- 14.1 Dromore currently holds the status of designated Local Town Centre in the Banbridge, Newry & Mourne Area Plan (BNMAP) 2015.
- 14.2 Dromore is a small market town in the north-east of the Study Zone. Its Centre is compact, composed of a central town square, with side streets leading off of the square. There is a designated conservation area within central Dromore. Dromore Place Plan is expected to commence in June 2023.

Figure 14.3.1 Land Use Plan



Source: Armagh City, Banbridge and Craigavon Borough Council

Figure 14.3.2 Photos of Dromore Local Town Centre



Source: Nexus Site Visit (June 2022)

## Composition and Vacancies

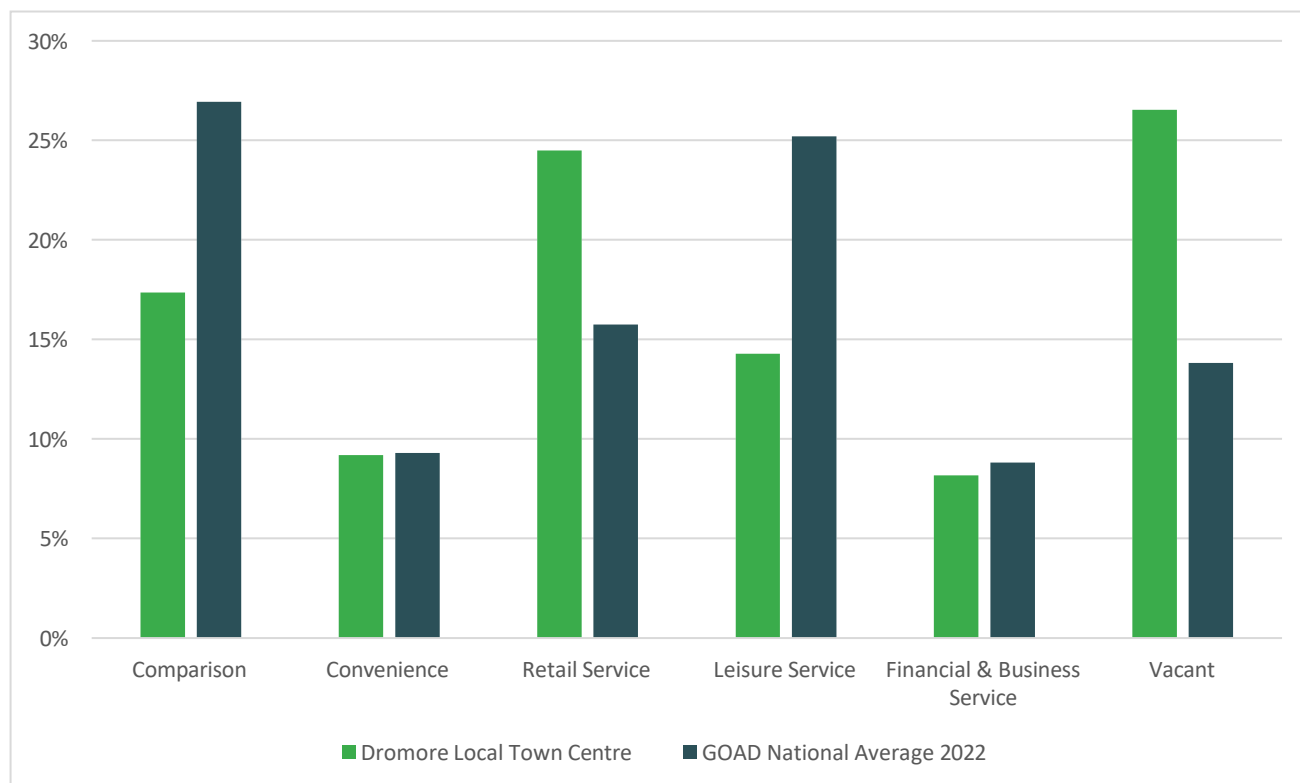
- 14.3 There are a total of 98 units in Dromore Town Centre. These are primarily independent retailers. It caters largely to the local community and their basic needs.
- 14.4 The comparison offer consists of 17 units, which makes up 17.3% of the total offer, which is significantly lower than the UK average of 26.9%. The comparison offer is diverse, including a bookshop, gift shops, clothes shops and a florist.
- 14.5 The convenience offer consists of nine units, which makes up 9.2% of the total offer, similar to the UK average (9.3%). These include convenience stores, butchers and a bakery. The Centre is noticeably lacking an anchor store or big supermarket.
- 14.6 Services make up 46.9% (46 units) of the total number of units, which is lower than the UK average (49.8%).
- Retail services make up 24.5% (24 units) of the total offer, which is significantly higher than the UK average of 15.8%. These include beauty salons, hairdressers, barbers, and an opticians.
  - Leisure services make up 14.3% (14 units) of the total number of units, which is significantly lower than the UK average of 25.2%. The offer includes cafes, pubs and takeaways. Stakeholders noted that the Centre's leisure offer is currently limited and needs to diversify.
  - Financial & Business Services make up 8.2% (8 units), which is slightly lower than the UK average of 8.8%.
- 14.7 Vacancies account for 26 units which makes up 26.5% of the total units, which is significantly higher than the UK average of 13.8%. There is a particular concentration of vacant units on Lower Mount Street, which forms the eastern entrance to the town centre.

Figure 14.8.1 Dromore Local Town Centre Composition (Units)

| Categories                      | Dromore Local Town Centre 2022 |        | UK Average 2022 |
|---------------------------------|--------------------------------|--------|-----------------|
|                                 | (#)                            | (%)    | (%)             |
| Comparison                      | 17                             | 17.3%  | 26.9%           |
| Convenience                     | 9                              | 9.2%   | 9.3%            |
| Services (Total)                | 46                             | 46.9%  | 49.8%           |
| <i>Retail</i>                   | 24                             | 24.5%  | 15.8%           |
| <i>Leisure</i>                  | 14                             | 14.3%  | 25.2%           |
| <i>Financial &amp; Business</i> | 8                              | 8.2%   | 8.8%            |
| Vacant                          | 26                             | 26.5%  | 13.8%           |
| TOTAL                           | 98                             | 100.0% | 100.0%          |

Source: LPA Centre Survey, and Experian GOAD (for UK Average)

Figure 14.8.2 Composition of Dromore Local Town Centre Compared to the UK Average



Source: LPA Centre Survey, and Experian GOAD (for UK Average)

## Environmental Quality

- 14.8 The central town square around the town hall and library is a pleasant area, with public toilets, benches and greenery. Units in the town square have generally well-kept shopfronts; effort had also been made to conceal the appearance of a vacant unit. A small community garden just off the town square provides more benches and greenery.
- 14.9 However, the quality of the environment declines on the roads leading away from the town square, particularly on Lower Mount Street, where there were multiple rundown vacant properties.
- 14.10 Overall, the town is characterful and quaint, aided by a heritage trail throughout the town. The town's amenities and attractions were signposted throughout, though some of these signposts were incorrect.
- 14.11 The Centre benefited from public realm improvements in 2020 but according to stakeholders, the Centre needs further investment to bring it to its full potential. Improvements to shop fronts have been planned for later this year.
- 14.12 Dromore Centre is generally safe and there are low levels of anti-social behaviour.
- 14.13 There is a significant area within Dromore alongside the River Lagan that fall within the 1:100 year climate change floodplain which would restrict opportunities for redevelopment.

## Accessibility

- 14.14** The majority of visitors (80.4%) travel to Dromore Centre by private vehicle. There are ample parking opportunities in the town centre, with spaces available in the town square, on side streets and in additional car parks to the north of the Centre. 19.2% of respondents identified parking facilities as an attraction of the Centre; although stakeholders raised issues regarding all day parking in the town centre car parks. There are relatively high levels of through traffic in the Centre, especially during peak times.
- 14.15** Public transport connectivity is poor. There are bus stops in the town square but the routes available are limited and service is infrequent.
- 14.16** 16.7% of visitors travel to the Centre on foot, the second highest of all Centres in the Study Area. The compact nature of the Centre allows for easy pedestrian movement. Though pavements in the central square are wide, they are noticeably narrower on side streets. The Centre is accessible via the River Lagan Walk, to the west of the centre on Banbridge Road. However, stakeholders suggested that the Centre needs better connectivity to the walk and other features of the town.

## Markets and Events

- 14.17** The Centre does not benefit from a market, nor other regular events.

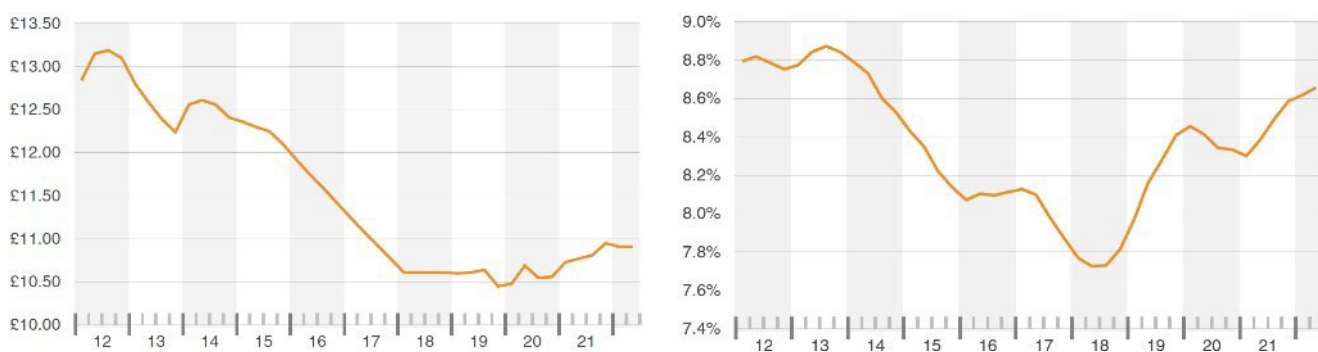
## Night Time Economy

- 14.18** The Centre has a very limited night time economy. Although the leisure offer includes some restaurants and pubs, their opening hours are sporadic and not coordinated.

## Prime Rents and Yields

- 14.19** The CoStar Retail Report 2022 identifies the market rent per square foot to be £10.90 and identifies that market yield in Dromore Local Town Centre is 8.7%

Figure 14.20.1 Market Rent per SF and Market Yield for Dromore Local Town Centre



Source: CoStar Retail Report 2022

## Commercial Demand

- 14.20** We have reviewed The Requirement List database to understand what operators seek representation in the respective centres.

## Town Centre Turnover

| Category              | Town Centre Turnover (p/a) (£) | Town Centre Market Share from the Study Area (p/a) (%) |
|-----------------------|--------------------------------|--------------------------------------------------------|
| Convenience           | £1.2                           | 0.1%                                                   |
| Clothing & footwear   | £0.0                           | 0.0%                                                   |
| Furniture goods       | £0.6                           | 0.6%                                                   |
| DIY goods             | £0.5                           | 0.6%                                                   |
| Electrical goods      | £0.0                           | 0.0%                                                   |
| Small Household goods | £0.0                           | 0.0%                                                   |
| Small Media           | £0.5                           | 0.8%                                                   |
| Chemist goods         | £1.5                           | 2.1%                                                   |
| Recreation goods      | £0.5                           | 0.3%                                                   |
| <b>Total Retail</b>   | <b>£4.8</b>                    | -                                                      |

## Public Opinion

- 14.21 According to the household survey, the most popular features of the Centre are that it is close to home or work (30.9%), has convenient car parking (19.2%) and that it is familiar to respondents (10.6%)
- 14.22 In terms of measures which could encourage more visits to the Centre, respondents to the household survey suggested a greater range of shops (12.8%), improved non-food shops (7.8%) and a more attractive environment (6.8%)

## Summary

- 14.23 Dromore Centre's comparison offer is small, but diverse. Among the comparison units are some high-end, niche stores, such as a bookshop, florists and gift shops.
- 14.24 The convenience offer is adequate for a town of this size, and is likely to meet the basic needs of the local population. The Centre is noticeably lacking an anchor store or big supermarket.
- 14.25 The retail services and financial and business services offer is generally strong, but the leisure service offer was identified as limited. Diversifying the current leisure service offer could attract more visitors to the Centre.
- 14.26 Vacancy levels are high, and a concentration of vacant properties to the east of the town create a poor first impression when arriving from that direction; making effort to conceal these would greatly improve the environmental quality of the Centre.
- 14.27 The Centre which is a designated conservation area benefits from historic character and nearby greenery. However, stakeholders suggested that more could be done to capitalise on these advantages.
- 14.28 Most visitors travel to the Centre by private vehicle, and the current provision of parking facilities was identified as a major attraction to the Centre although issues were also raised regarding all day parking in the town centre car parks.

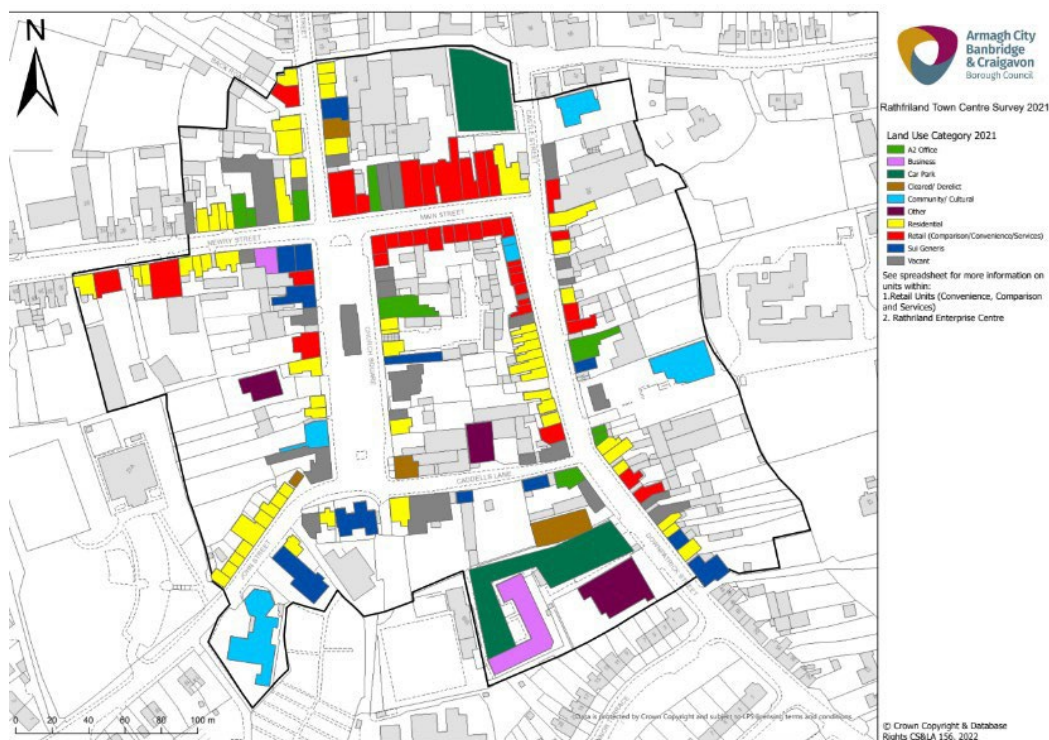
Conversely, access to the Centre by public transport is poor. A considerable number of visitors travel to the Centre on foot, but accessibility and movement for pedestrians could be improved by widening pavements and increasing connectivity between the River Lagan Walk and the Centre.

## 15. Rathfriland Health Check

### Description

- 15.1 Rathfriland currently holds the status of a designated Local Town Centre in the Banbridge, Newry & Mourne Area Plan (BNMAP) 2015.
- 15.2 Rathfriland is a small town in the south-east of the Study Area. The Centre is concentrated in the Church Square and surrounding side streets.

Figure 15.2.1 Land Use Plan



Source: Armagh City, Banbridge and Craigavon Borough Council

Figure 15.2.2 Photos of Rathfriland Local Town Centre



Source: LPA Centre Survey, and Experian GOAD (for UK Average)

## Composition and Vacancies

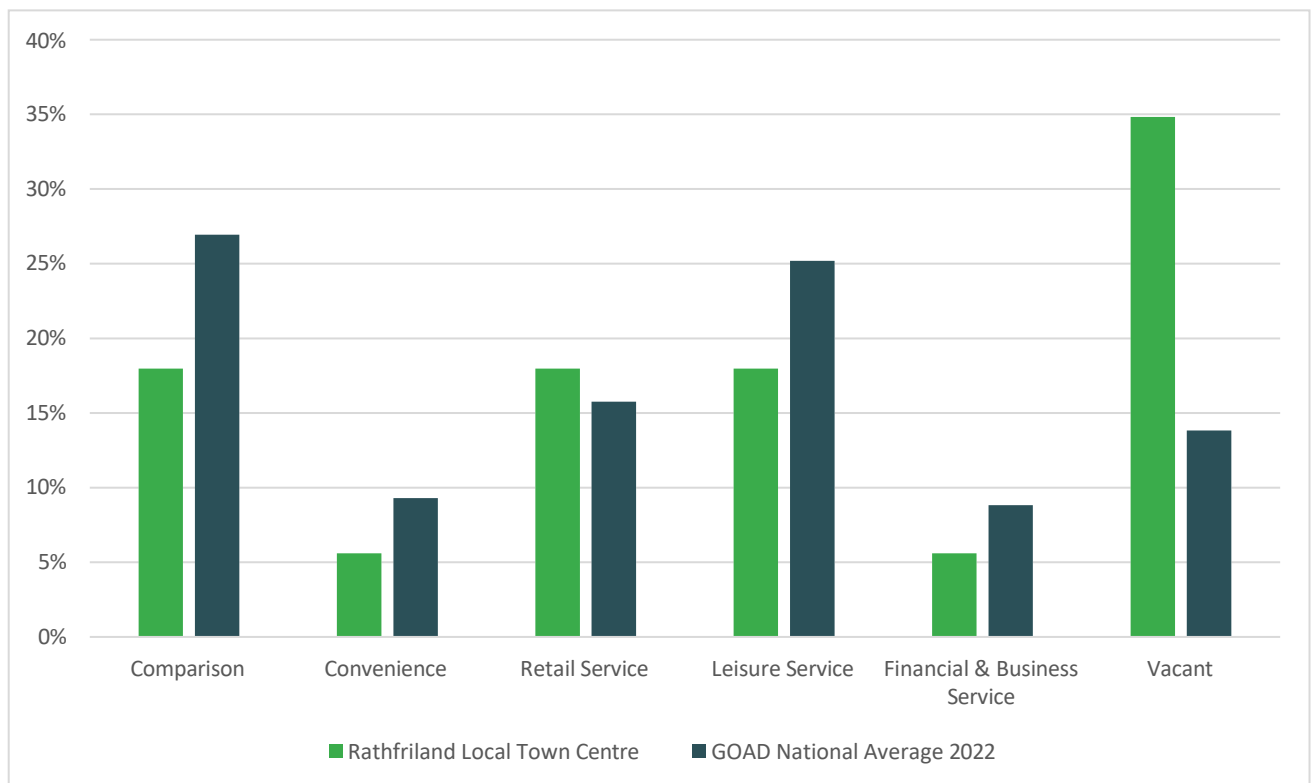
- 15.3 There are a total of 89 units in Rathfriland Town Centre.
- 15.4 The comparison offer consists of 16 units, which makes up 18.0% of the total offer, which is significantly lower than the UK average of 26.9%. The comparison offer is fairly diverse, with shops specialising in furniture, hardware and clothing.
- 15.5 The convenience offer consists of five units, which makes up 5.6% of the total offer, lower than the UK average (9.3%). These five units consist of two butchers, a bakery, a grocers and a convenience store. Though the offer is limited, it meets the basic needs of the local community.
- 15.6 Services make up 41.6% (37 units) of the total number of units, which is lower than the UK average (49.8%).
- a. Retail services make up 18.0% (16 units) of the total offer, a number higher than the UK average of 15.8%. These units include hairdressers, beauty salons and garages.
  - b. Leisure services make up 18.0% (16 units) of the total number of units, which is significantly lower than the UK average of 25.2%. These are primarily takeaways, though there are a few cafes and pubs. Stakeholders identified an expansion of the leisure offer as something that could support the tourist trade.
  - c. Financial & Business Services make up 5.6% (five units), which is lower than that of the UK average of 8.8%.
- 15.7 Vacancies account for 31 units which makes up 34.8% of the total units, which is significantly higher than the UK average of 13.8%. Many of these vacancies are long-standing, often in derelict properties which are not fit for purpose. For properties in good condition, new tenants can be found relatively quickly.

Figure 15.7.1 Rathfriland Local Town Centre Composition

| Categories                      | Rathfriland Local Town Centre 2022 |        | UK Average 2022 |
|---------------------------------|------------------------------------|--------|-----------------|
|                                 | (#)                                | (%)    | (%)             |
| Comparison                      | 16                                 | 18.0%  | 26.9%           |
| Convenience                     | 5                                  | 5.6%   | 9.3%            |
| Services (Total)                | 37                                 | 41.6%  | 49.8%           |
| <i>Retail</i>                   | 16                                 | 18.0%  | 15.8%           |
| <i>Leisure</i>                  | 16                                 | 18.0%  | 25.2%           |
| <i>Financial &amp; Business</i> | 5                                  | 5.6%   | 8.8%            |
| Vacant                          | 31                                 | 34.8%  | 13.8%           |
| TOTAL                           | 89                                 | 100.0% | 100.0%          |

Source: LPA Centre Survey, and Experian GOAD (for UK Average)

Figure 15.7.2 Composition of Rathfriland Local Town Centre Compared to the UK Average



Source: LPA Centre Survey, and Experian GOAD (for UK Average)

## Environmental Quality

- 15.8** Though Rathfriland benefits from a historic town square in the centre, there is the sense that this space is underutilised. There are relatively few trading units here, and several notable vacant properties; the former Market House, in the middle of the square, is a particular eyesore. To the north and south of the square, there are paved areas with greenery and benches.
- 15.9** The Centre is relatively clean and safe, though there are some elements of anti-social behaviour.

## Accessibility

- 15.10** 100% of respondents to the household survey travel to the Centre by private vehicle. Traffic levels are low in Church Square itself, but higher on Downpatrick Street and Main Street, due to its position on the A25. There is parking available in Church Square, in addition to on-street parking on side streets.
- 15.11** Bus routes from Newry and Banbridge allow for direct access to the Centre, but these services are infrequent.
- 15.12** The Centre is compact, which aids in its accessibility. However, pedestrian movement is somewhat hindered, as pavements in the square are wide but narrower on side streets, and at points are blocked by cars. There are also few designated crossings available.

## Markets and Events

- 15.13** A Christmas market takes place annually.

- 15.14 The Rathfriland Regeneration Company is in the process of setting up a monthly artisan market.

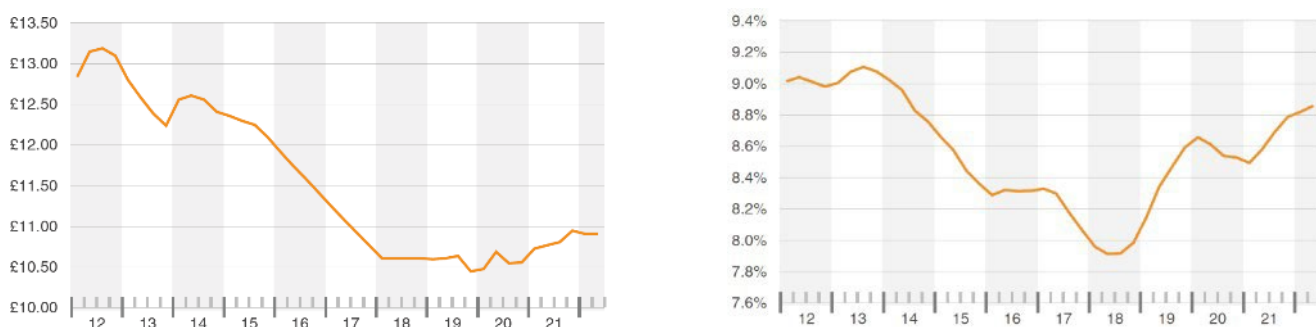
### Night Time Economy

- 15.15 The evening economy is very limited, as there are very few units which stay open in the evening. Stakeholders identified a night time economy as an area of improvement which could attract more tourists.

### Prime Rents and Yields

- 15.16 The CoStar Retail Report 2022 identifies the market rent per square foot to be £10.90 and identifies that market yield in Rathfriland Local Town Centre is 8.8%.

Figure 15.16.1 Market Rent per SF and Market Yield for Rathfriland Local Town Centre



Source: CoStar Retail Report 2022

### Commercial Demand

- 15.17 We have reviewed The Requirement List database to understand what operators seek representation in the respective centres.

### Town Centre Turnover

| Category              | Town Centre Turnover (p/a) (£) | Town Centre Market Share from the Study Area (p/a) (%) |
|-----------------------|--------------------------------|--------------------------------------------------------|
| Convenience           | £6.0                           | 0.6%                                                   |
| Clothing & footwear   | £3.7                           | 1.0%                                                   |
| Furniture goods       | £2.3                           | 2.2%                                                   |
| DIY goods             | £0.9                           | 1.1%                                                   |
| Electrical goods      | £1.4                           | 1.0%                                                   |
| Small Household goods | £3.6                           | 1.5%                                                   |
| Small Media           | £1.1                           | 1.7%                                                   |
| Chemist goods         | £2.6                           | 3.5%                                                   |
| Recreation goods      | £2.2                           | 1.5%                                                   |
| <b>Total Retail</b>   | <b>£23.8</b>                   | -                                                      |

## Public Opinion

- 15.18 The most popular feature of Rathfriland Centre is that it is close to home or work (27.4%), suggesting that people visit because it is convenient.
- 15.19 The main intervention identified in the household survey was to increase the choice and range of shops available (22.9%).

## Summary

- 15.20 The retail offer of Rathfriland Centre is limited, but is able to meet the basic needs of the local community. Responses to the household survey suggest there is a desire for a greater choice and range of shops available.
- 15.21 Stakeholders identified the potential for tourism trade in the Centre, but the current leisure service provision is limited and unable to accommodate this. An expansion of the leisure service could support the tourism industry and the creation of a night time economy in the Centre.
- 15.22 Vacancies are an issue in the Centre, due to the number of them and their prominent locations. It is understood that many of these are derelict properties which are difficult to let out, but more effort could be made to conceal them.
- 15.23 The central town square is an underutilised space featuring many vacancies. Focusing on introducing new tenants here could make the area a more vibrant environment.

## 16. Gilford Health Check

### Description

- 16.1 Gilford currently holds the status of designated Local Town Centre in the Banbridge, Newry & Mourne Area Plan (BNMAP) 2015.
- 16.2 Gilford sits on the A50, located between the larger towns of Portadown and Banbridge. Its Centre is based around its high street (Dunbarton Street and Mill Street).

Figure 16.2.1 Land Use Plan



Source: Armagh Council, Banbridge and Craigavon Borough Council

Figure 16.2.2 Photos of Gilford Local Town Centre



Source: Nexus Site Visit (June 2022)

## Composition and Vacancies

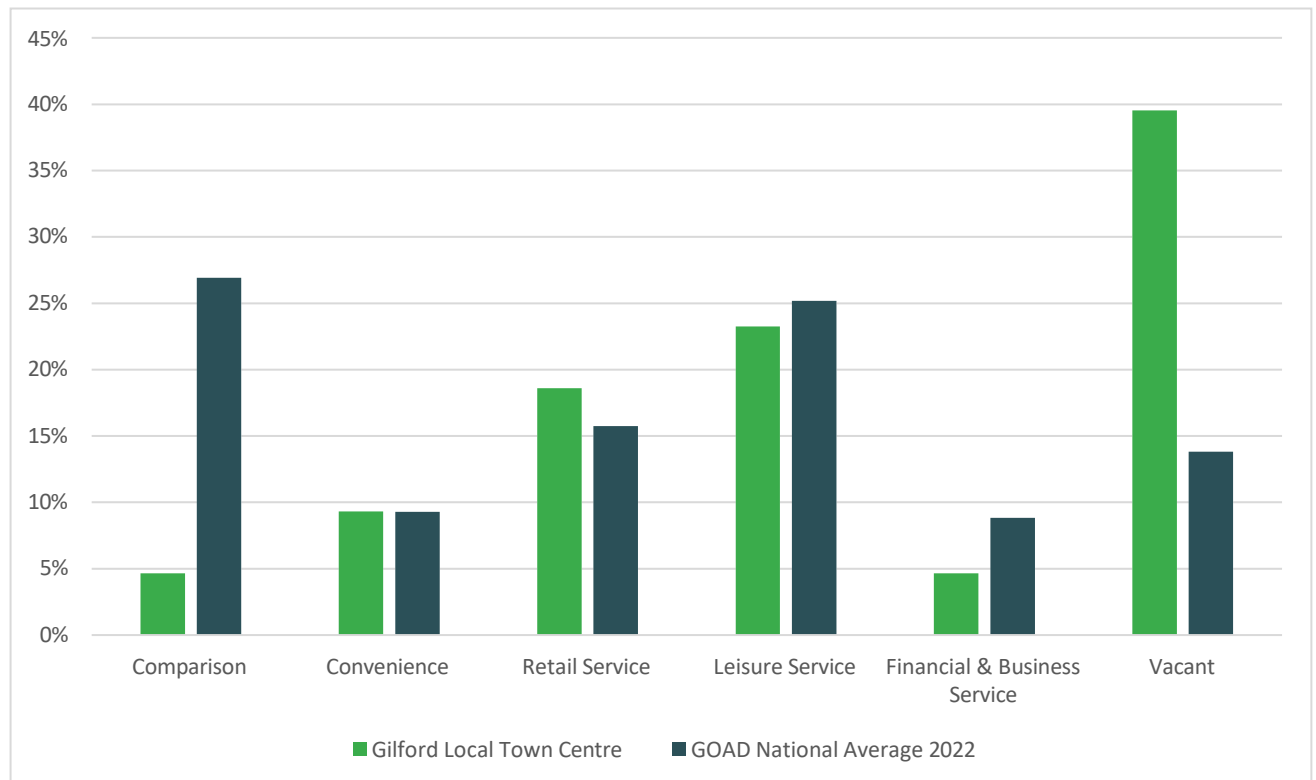
- 16.3 There are a total of 43 units in Gilford Town Centre. These are primarily independent retailers.
- 16.4 The comparison offer consists of only two units, which makes up 4.7% of the total offer, which is significantly lower than the UK average of 26.9%. The comparison units are an interiors shop and a pharmacy.
- 16.5 The convenience offer consists of four units, which makes up 9.3% of the total offer, equivalent to the UK average (9.3%). These consist of two convenience stores, a butchers and an off-licence. The convenience offer is lacking both a large supermarket and shops selling specialist goods, such as bakeries and greengrocers.
- 16.6 Services make up 46.5% (20 units) of the total number of units, which is lower than the UK average (49.8%).
- Retail services make up 18.6% (eight units) of the total offer, higher than the UK average of 15.8%. These include a beauty salon, hairdresser, barber, tattoo studio and valeting service.
  - Leisure services make up 23.3% (ten units) of the total number of units, slightly lower than the UK average of 25.2%. The offer includes cafes, pubs and takeaways. Gilford also benefits from a new community and leisure centre, but this is disconnected from the Centre and as such, fails to bring in new trade.
  - Financial & Business Services make up 4.7% (two units), which is below that of the UK average of 8.8%.
- 16.7 Vacancies account for 17 units which makes up 39.5% of the total units, which is nearly three times the UK average of 13.8%. It is understood that the majority of these are long-term vacancies.

Figure 16.7.1 Gilford Local Town Centre Composition (Units)

| Categories                      | Gilford Local Town Centre 2022 |        | UK Average 2022 |
|---------------------------------|--------------------------------|--------|-----------------|
|                                 | (#)                            | (%)    | (%)             |
| Comparison                      | 2                              | 4.7%   | 26.9%           |
| Convenience                     | 4                              | 9.3%   | 9.3%            |
| Services (Total)                | 20                             | 46.5%  | 49.8%           |
| <i>Retail</i>                   | 8                              | 18.6%  | 15.8%           |
| <i>Leisure</i>                  | 10                             | 23.3%  | 25.2%           |
| <i>Financial &amp; Business</i> | 2                              | 4.7%   | 8.8%            |
| Vacant                          | 17                             | 39.5%  | 13.8%           |
| TOTAL                           | 43                             | 100.0% | 100.0%          |

Source: LPA Centre Survey, and Experian GOAD (for UK Average)

Figure 16.7.2 Composition of Gilford Local Town Centre Compared to the UK Average



Source: LPA Centre Survey, and Experian GOAD (for UK Average)

## Environmental Quality

- 16.8** Gilford experiences high vacancy rates. In most of these cases, vacant properties are not hidden and look run down. Of units that are trading, the shopfronts are generally outdated and not well-kept.
- 16.9** Along the high street, some effort has been made to improve the environmental quality by planting trees and installing benches and bins.

## Accessibility

- 16.10** Due to its position on the A50, Gilford Centre experiences high levels of through traffic. On-street parking is available.
- 16.11** Sheltered bus stops in the town centre offer routes to Lurgan, Tandragee, Portadown and Banbridge, though services are fairly infrequent.
- 16.12** Pedestrian movement is somewhat limited, as there is only one designated pedestrian crossing on the high street. Pavements along the high street are fairly wide, though at times, cars parking on them restrict accessibility.

## Markets and Events

- 16.13** A Christmas market takes place annually.

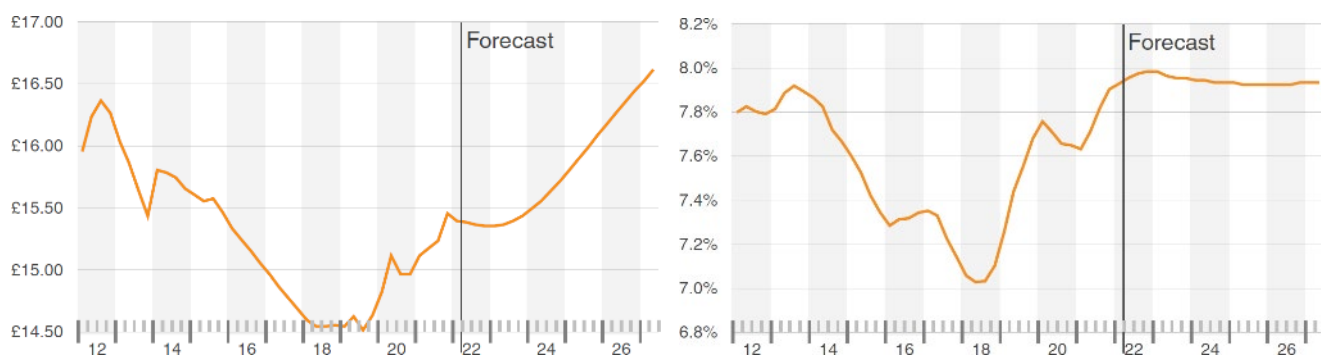
## Night Time Economy

- 16.14 The night time economy is extremely limited. Most units close after 6pm, and only pubs stay open in the evening, making for a very quiet atmosphere.

## Prime Rents and Yields

- 16.15 The CoStar Retail Report 2022 identifies the market rent per square foot to be £15.39 and identifies that market yield in Gilford Local Town Centre is 8.0%.

Figure 16.15.1 Market Rent per SF and Market Yield for Gilford Local Town Centre



Source: CoStar Retail Report 2022

## Commercial Demand

- 16.16 We have reviewed The Requirement List database to understand what operators seek representation in the respective centres.

## Town Centre Turnover

| Category              | Town Centre Turnover (p/a) (£) | Town Centre Market Share from the Study Area (p/a) (%) |
|-----------------------|--------------------------------|--------------------------------------------------------|
| Convenience           | £0.6                           | 0.1%                                                   |
| Clothing & footwear   | £0.0                           | 0.0%                                                   |
| Furniture goods       | £0.0                           | 0.0%                                                   |
| DIY goods             | £0.0                           | 0.0%                                                   |
| Electrical goods      | £0.0                           | 0.0%                                                   |
| Small Household goods | £0.0                           | 0.0%                                                   |
| Small Media           | £0.0                           | 0.0%                                                   |
| Chemist goods         | £0.0                           | 0.1%                                                   |
| Recreation goods      | £0.0                           | 0.0%                                                   |
| <b>Total Retail</b>   | <b>£0.7</b>                    | <b>-</b>                                               |

## Public Opinion

- 16.17 The household survey did not obtain a large enough sample of participants to gain meaningful results for Gilford Centre.

## Summary

- 16.18 Gilford Centre's retail offer is very limited. Its comparison offer includes only two units, and its convenience offer lacks both large supermarkets and small specialist traders. As such, there is currently little to draw visitors in. An improved retail offer could attract more visitors to the Centre.
- 16.19 Gilford suffers from high vacancy levels, which are a particular eyesore on the town. Most of these vacancies are long-term.
- 16.20 There are high levels of traffic in the Centre due to its position as a through route. The noise and congestion associated with this further detracts from the Centre's environmental quality.
- 16.21 Access to the Centre by public transport connections is limited but is served by bus services between Portadown, Lurgan, Tandragee and Banbridge. Pedestrian movement around the Centre is relatively easy due to its compact nature.

## 17. Legahory Health Check

### Description

- 17.1 Legahory currently holds the status of a designated District Centre in the Craigavon Area Plan (CAP) 2010. However, the centre boundary is focused around undeveloped land to the south west of the main shopping area, as outlined on the plan below.

Figure 17.1.1 Adopted Centre Boundary



- 17.2 The main shopping area consists of Legahory Centre (a small shopping centre), Moylinn House (which contains a number of offices and community and cultural uses) and Brownlow Health Centre across the street which contains a health centre, a dentist and a pharmacy. The plan below shows the location of these uses.

Figure 17.2.1 Location of the main shopping area (as assessed by Nexus)

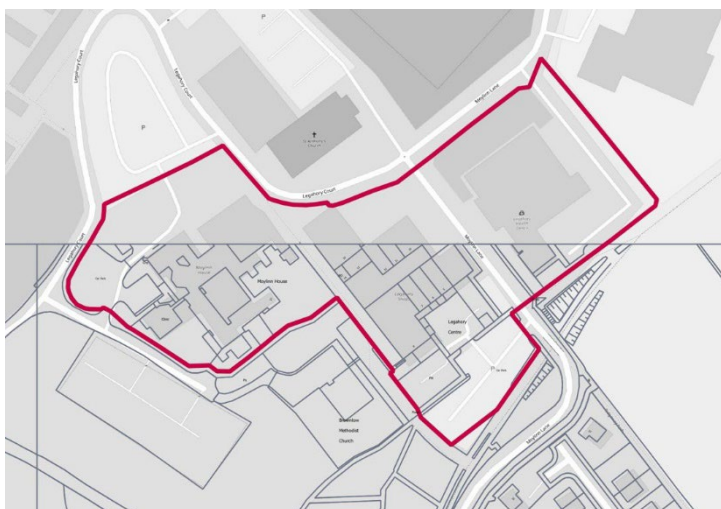


Figure 17.2.2 Photos of Legahory District Centre



Source: Nexus Site Visit (June 2022)

## Composition and Vacancies

- 17.3 Full composition details for Legahory were unavailable. However, following the site visit, we understand that there is a total of 14 units.
- 17.4 The comparison offer consists of just one unit, a pharmacy.
- 17.5 The convenience offer consists of two convenience units: a convenience store and a butchers.
- 17.6 There are a total of eight services.
- a. There are two retail services: a post office and a hairdressers/beauty salon.
  - b. There are four leisure services: a takeaway, a café, a betting office and a gym.
  - c. There are two financial and business services, both solicitors.
- 17.7 There are three vacant units, all in Legahory Centre.
- 17.8 North-west of Legahory Centre is Moylinn House which contains a number of offices serving the local community and a crèche.

## Environmental Quality

- 17.9 The district overall has a tired, rundown appearance. The main building appears dated, both externally and internally. Shop frontages look outdated and poorly maintained. There are several vacancies where no effort had been made to conceal them. The Centre is considered to be safe.

## Accessibility

- 17.10 There is a car park to the south of the centre. There are no bus stops in the immediate vicinity of the Centre but there is a bus stop 200m to the south on Drumgor Road for the regular Portadown-Lurgan bus service. The compact nature of the Centre means it is easy for pedestrians to navigate, however during the site visit it was observed that there were relatively

few pedestrians or shoppers. The centre is connected to the extensive 'black-path' cycle and pedestrian path network. This network was part of the Craigavon 'New Town' model and links Lurgan, Central Craigavon and Portadown.

## Markets and Events

- 17.11 The Centre does not benefit from a market, nor other regular events.

## Night Time Economy

- 17.12 There are no restaurants or bars to support a night time economy, and shops close before the evening.

## Prime Rents and Yields

- 17.13 The CoStar Retail Report 2022 identifies the market rent per square foot to be £10.90 and identifies that market yield in Legahory District Centre is 9.1%.

Figure 17.13.1 Market Rent per SF and Market Yield for Legahory District Centre



Source: CoStar Retail Report 2022

## Commercial Demand

- 17.14 We have reviewed The Requirement List database to understand what operators seek representation in the respective centres.

## Town Centre Turnover

- 17.15 Information is not available.

## Public Opinion

- 17.16 The household survey did not obtain a large enough sample of participants to gain meaningful results for Legahory District Centre.

## Summary

- 17.17 The retail offer of the Centre is extremely limited.
- 17.18 The leisure service offer is very limited and there are no units which can support a night time economy.
- 17.19 The appearance of the Centre is in general very tired and rundown. Vacant units are not concealed, which further detracts from the environmental quality.

- 17.20 The centre is easily accessible by car and is on the existing 'black-path' cycle and pedestrian path network offering opportunities for active travel.

## 18. Benchmarking

- 18.1 We have undertaken a comparative review of the performance of Armagh, Banbridge, Craigavon, Lurgan, Portadown, Keady, Markethill, Tandragee, Dromore, Gilford and Rathfriland against similar centres in Northern Ireland. The comparator centres have been chosen based on the Retail and Leisure Studies undertaken by Nexus elsewhere.
- 18.2 The benchmarking exercise examines the following criteria:
- a. Number of retail outlets - sourced from the respective Retail and Leisure Study
  - b. Proportion of convenience units - sourced from the respective Retail and Leisure Study
  - c. Proportion of comparison units - sourced from the respective Retail and Leisure Study
  - d. Proportion of service units - sourced from the respective Retail and Leisure Study
  - e. Vacancies – sourced from the respective Retail and Leisure Study
  - f. Average Market Rent per Square Foot - Utilising CoStar database, we set out the range of average prime rental properties in each centre in order to characterize the demand for retail space in each.
- 18.3 As well as with each other, **Armagh, Banbridge, Craigavon, Lurgan and Portadown** are compared to the following centres:
- a. **Antrim** was assessed by Nexus as part of the Antrim & Newtownabbey Retail & Commercial Leisure Study (2019). Antrim is located in the northeast of Northern Ireland approximately 29km northwest of Belfast. Antrim has a traditional high street at its core.
  - b. **Coleraine** was assessed by Nexus as part of the Causeway Coast & Glens Retail and Commercial Leisure Capacity Assessment (2017) and Retail Capacity Assessment Update (2020). The town functions as a major centre for shops and services and is the principal town in the Causeway Coast and Glens Borough. The town is located near to tourist destinations such as the Giant's Causeway and Causeway Coast World Heritage Site. Further, the town is the key administrative centre of the Borough.
  - c. **Newry** was assessed by Nexus as part of the Newry, Mourne and Down Retail and Commercial Leisure Capacity Study (2020). Newry City Centre is located close to the border with the Republic and is 62km south-west of Belfast. The City Centre is divided into two halves by the River Clanrye and the Newry Canal.
  - d. **Newtownards** was assessed by Nexus as part of the Ards and North Down Borough Council Retail and Commercial Leisure Study (2022). Newtownards currently holds the status of a designated Town Centre, located some 22 km east of Belfast. It is dominated by independent operators who provide a high level of customer service and enjoy strong customer loyalty.

Figure 18.3.1 Benchmarking for Armagh, Banbridge, Craigavon, Lurgan and Portadown

| Benchmark Criteria              | Armagh | Banbridge | Craigavon | Lurgan | Portadown | Newtown-ards | Antrim | Coleraine | Newry  |
|---------------------------------|--------|-----------|-----------|--------|-----------|--------------|--------|-----------|--------|
| Number of retail outlets        | 438    | 282       | 70        | 347    | 449       | 294          | 148    | 431       | 467    |
| Proportion of Convenience Units | 6.8%   | 7.1%      | 7.1%      | 8.1%   | 5.8%      | 6.1%         | 11.5%  | 7.4%      | 7.3%   |
| Proportion of comparison units  | 26.5%  | 28.0%     | 61.4%     | 21.9%  | 25.2%     | 29.9%        | 27.0%  | 38.5%     | 33.4%  |
| Proportion of Service units     | 43.6%  | 49.6%     | 27.1%     | 49.3%  | 49.7%     | 49.7%        | 41.2%  | 34.3%     | 40.5%  |
| Proportion of Vacant units      | 23.1%  | 15.2%     | 4.2%      | 20.7%  | 19.4%     | 14.3%        | 20.3%  | 19.7%     | 18.8%  |
| Average market Rent per SF      | £17.84 | £12.05    | £29.49    | £11.88 | £14.64    | £12.21       | £16.33 | £24.63    | £29.88 |

#### 18.4 Comparative to other centres:

- On average, Armagh, Banbridge, Lurgan and Portadown have a much stronger service function, which is at the expense of the comparison offer. The average convenience offer in these centres is comparable to cumulative averages of Newtownards, Coleraine and Newry (whereas Antrim seems to have a much higher figure, which is higher than the national average of 9.3%). However, cumulatively the vacancy rate is higher- albeit this is inflated by the figures in Armagh and Lurgan. The average market rent per square foot is also lower than in the other similar centres.
- Due to its modern retail park format, Craigavon has a very unique function compared to more traditional centre. Comparative to other centres it has fewer units which helps explain the larger unit size. Its comparison offer is overall greater, albeit at the expense of the service offer. Vacancies are very low. The average market rent per square foot is higher, similar to that in Newry.

#### 18.5 As well as with each other, **Keady, Markethill, Tandragee, Dromore, Rathfriland and Gilford** are compared to the following centres:

- Randalstown** was assessed by Nexus as part of the Antrim & Newtownabbey Retail & Commercial Leisure Study (2019). Randalstown is a small town located in the northeast of Northern Ireland approximately 16km northwest of Antrim.
- Portrush** was assessed by Nexus as part of the Causeway Coast & Glens Retail and Commercial Leisure Capacity Assessment (2017) and Retail Capacity Assessment Update (2020). Portrush is a seaside town located on the northern coast of Northern Ireland. Portrush is a popular visitor and tourist destination, as reflected in some of its Town Centre offer.

- c. **Kilkeel** was assessed by Nexus as part of the Newry, Mourne and Down Retail and Commercial Leisure Capacity Study (2020). Kilkeel is a small coastal town and is the main fishing port on the Down coast, its harbour is home to the largest fishing fleet in Northern Ireland.
- d. **Donaghadee** was assessed by Nexus as part of the Ards and North Down Borough Council Retail and Commercial Leisure Study (2022). Donaghadee is a small coastal town in the northeast coast of the Ards Peninsula, about 10km south-east of Bangor. The Town Centre benefits from a pleasant seafront. It is predominantly occupied by independent retailers. Whilst the Centre has a tourist element, the retail offer is generally accented towards the year-round local population.

Figure 18.5.1 Benchmarking for Keady, Markethill, Tandragee, Dromore and Rathfriland

| Benchmark Criteria              | Keady | Markethill | Tandragee | Dromore | Rathfriland | Gilford | Randalstown | Portrush | Kilkeel | Donaghadee |
|---------------------------------|-------|------------|-----------|---------|-------------|---------|-------------|----------|---------|------------|
| Number of retail outlets        | 82    | 44         | 62        | 98      | 89          | 43      | 51          | 111      | 113     | 83         |
| Proportion of Convenience Units | 7.3%  | 9.1%       | 9.7%      | 9.2%    | 5.6%        | 9.3%    | 13.7%       | 11.7%    | 8.0%    | 7.2%       |
| Proportion of comparison units  | 12.2% | 29.5%      | 21.0%     | 17.3%   | 18.0%       | 4.7%    | 19.6%       | 32.4%    | 21.2%   | 19.3%      |
| Proportion of Service units     | 46.3% | 40.9%      | 48.4%     | 46.9%   | 41.6%       | 46.5%   | 52.6%       | 45.0%    | 49.5%   | 63.9%      |
| Proportion of Vacant units      | 34.1% | 20.5%      | 21.0%     | 26.5%   | 34.8%       | 39.5%   | 13.7%       | 10.8%    | 21.2%   | 9.6%       |
| Average market Rent per SF      | £6.33 | -          | £12.95    | £10.90  | £10.90      | £15.39  | £9.79       | £11.19   | £11.40  | £11.23     |

## 18.6 Comparative to other centres:

- a. On average, the vacancy rates are significantly higher (especially in Rathfriland, Keady and Gilford). This has an overall knock-on effect whereby the proportion of convenience, comparisons and services units is also lower.
- b. However, the average market rent per square foot is comparable to other similar centres; albeit Keady is significantly lower, and Gilford slightly higher.

## 19. Policy & Proposals

### Introduction

19.1 Taking account of extant planning policy, the Council's Preferred Options Paper and the evidence gathered through this Study, this section provides guidance to inform the emerging Local Development Plan on the following matters:

- a. The retail hierarchy of centres;
- b. The spatial extent of centres;
- c. Development Opportunity Sites; and
- d. Recommended planning policy approach.

19.2 We address each of these tasks in turn below.

### The Retail Hierarchy of Centres

19.3 In Sections 5-17, we set out a detailed health-check of twelve centres identified within Table 7.1 of the Preferred Options Paper for the Borough (2018). Our work has involved analysing the health of each of these centres under a series of checks specified by SPPS, as well as understanding market shares and qualitative likes and dislikes deriving from a widespread household telephone survey. Finally, we have sought to corroborate our results through a series of workshops with stakeholders in each of the main centres. Alongside this work, we have examined, in Section 4, a series of quantitative assessments to understand what, if any, gaps there are in local retail and leisure provision. The culmination of this work allows us to recommend an appropriate hierarchy of centres for the Borough, taking account both of present circumstances, and the Council's wider plan-making aims and objectives.

19.4 By way of background, when it comes to identifying a retail hierarchy, the SPPS (2015) identifies that local planning authorities must define a network and hierarchy of centres for the purposes of retail planning. This retail hierarchy is different to the settlement hierarchy which is also required to be defined.

19.5 The most relevant parts of the SPPS, Paragraphs 6.277 – 6.278, are set out below for reference:

*6.277 LDPs should also:*

- a. *Define a network and hierarchy of centres – town, district and local centres, acknowledging the role and function of rural centres;*
- b. *Define the spatial extent of town centres and the primary retail core;*
- c. *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;*
- d. *Provide for a diverse offer and mix of uses, which reflect local circumstances; and*
- e. *Allocate a range of suitable sites to meet the scale and form of retail, and other town centre uses.*

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

- 19.6 At the outset, we think it is helpful to quickly examine some of the purposes of defining a hierarchy of centres. Symbolically, it is a signal to investors as to where the Council is looking to provide for future growth. But in more practical planning terms, it is also a key component of the 'impact' and 'sequential' tests in decision-making for town centre uses. We consider this further in the section on Plan Policy below, but in brief, the higher up in the hierarchy a centre is, the more varied you might expect its range of town centre uses to be, and the more resilient and welcoming of new developments within, or close by, its centre it might be. More importantly still, the hierarchy determines how the sequential test is applied under a 'town centre first' regime. By way of example, a proposal for an out-of-centre foodstore would ordinarily be expected to pass the test of having first examined the availability, suitability and viability of central or edge-of-centre sites in nearby higher order centres (i.e. town centres) in its catchment.
- 19.7 Turning specifically to the position in the Borough, the Council's Preferred Options Paper (2018) (Table 7.1) sets out the legacy classification of existing centres from the Craigavon Area Plan (2010). We extrapolate Table 7.1 below.

| Table 7.1: Existing Hierarchy of Centres |                                                                                                                                                                                                                                                                                                                                                                                                           |
|------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Hubs:<br/>Main City/Towns</b>         | The following main City / Towns have designated Town Centres:<br><b>Armagh City</b><br><b>Banbridge</b><br><b>Central Craigavon</b><br><b>Lurgan</b><br><b>Portadown</b>                                                                                                                                                                                                                                  |
| <b>Local Towns</b>                       | Currently no Town Centres have been designated for the following Local Towns in the Armagh Area Plan 2004:<br><b>Keady</b><br><b>Markethill</b><br><b>Tandragee</b><br><br>The following Town Centres have been designated in the Banbridge/Newry and Mourne Area Plan 2015:<br><b>Dromore</b><br><b>Gilford</b><br><b>Rathfriland</b><br><br>Craigavon Area Plan 2010 did not designate any Local Towns. |
| <b>Villages</b>                          | There are currently no village centres designated in the Borough.                                                                                                                                                                                                                                                                                                                                         |
| <b>District/Local Centres</b>            | Legahory District Centre is the only District / Local Centre that is designated in the Borough through the Craigavon Area Plan 2010.                                                                                                                                                                                                                                                                      |

- 19.8 Notably, there were no local town centre boundaries designated under the Armagh Area Plan (2004), and the Council considers there to be general inconsistencies in the hierarchy set out in Table 7.1. POP Option ECN 5A therefore seeks support for identifying a new hierarchy of centres based upon their current role and function, as well as identifying new centres where appropriate.

- 19.9 Table 7.2 sets out the Council's suggested hierarchy in the POP. This contains four tiers, and a description of the role of each suggested tier. We extrapolate Table 7.2 below.

**Table 7.2 Proposed Classification for the Hierarchy of Centres**

| Tier | Classification   | Example of Role                                                                                                                                                                                                                           |
|------|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1    | Main Town Centre | May involve such role as: Provides (or has the potential to provide) a broad range of shops, businesses, facilities and services to serve a significant hinterland. It is both the focus for the community and public transport networks. |
| 2    | District Centre  | May involve such role as: Provides (or has the potential to provide) a range of shops and non-retail service uses (e.g. banks, building societies, restaurants) to serve a hinterland which may include neighbouring villages.            |
| 3    | Local Centre     | May involve such role as: Provides (or has the potential to provide) a small grouping of shops, typically comprising a general grocery store, a sub post office, occasionally a pharmacy and other small shops of a local nature.         |
| 4    | Village Centre   | May involve such role as: Provides (or has the potential to provide) a limited number of shops to serve local needs within a village hinterland.                                                                                          |

- 19.10 Based on the findings of this Study, as well as prevailing planning policy guidance contained in the SPPS, we are asked to comment on the suitability of this proposed hierarchy.
- 19.11 Firstly, we agree that the four-tier hierarchy would be in keeping with the first bullet point of the SPPS at 6.227, where it recommends a hierarchy of town, district, local and rural centres. We note that the Council has utilised the term 'main town centre' instead of 'town centre', but we consider this helpful. Based on recent Plan examinations in Northern Ireland we have appeared at, it is useful to distinguish between the colloquial term for all types of centre (i.e. a town centre), and what is meant to be a specific tier in this hierarchy (i.e. a Main Town Centre). Building on this experience, the Council should be careful in its policy wording throughout its Plan formulation to continue to carefully distinguish between the two.
- 19.12 Secondly, we also note that the SPPS 'rural centre' tier is replaced in the POP by a 'village centre' tier. Again, we think this is appropriate as it better reflects the purpose of a retail hierarchy, which should be to define a hierarchy based on centres of similar role and function, not whether they are urban or rural in nature. Notwithstanding, as we go on to set out below, we recommend a further amendment to the titles within the hierarchy.
- 19.13 Beyond listing a four-tier hierarchy at 6.277, the SPPS is silent on how each category should be defined. The Council has therefore rightly sought to define its own 'role' to each tier of the hierarchy in Table 7.2. We have reviewed these descriptions and think that they accurately describe the intended tier in the hierarchy and provide for a clear distinction between each tier. We do though suggest some minor text changes below, to ensure there is no ambiguity around the types of goods and services which would usually characterise each centre. For example, the hierarchy as currently drafted could be read to suggest that 'non-retail services uses' would only be present in Tier 2 District Centres, as that is the only place they are mentioned. In practice though, uses such as banks, building societies and restaurants would likely be found at Tiers 1 and 3 too, as evidenced by our health-check work.

- 19.14** We also consider that the POP description of services for Tier 3 (Local Centres) is likely to be considered too prescriptive and have recommended broadening its definition whilst also aligning general terminology. In particular, it is now commonly the case that single units contain a mix of uses/types of goods, and it is therefore important to broaden the defined role of centres to reflect the evolution on the format and layout of modern stores.
- 19.15** We understand that the Council is currently undertaking a further review of the title of each of the four tiers in the hierarchy. They now intend to describe tiers 2, 3 and 4 as 'Small Town Centres', 'District Centres' and 'Local Centres', respectively. This would not in our view cause any issue, provided that the Council was satisfied that the description of the 'role' was substantiated in each case. We utilise these terms in our assessment below.
- 19.16** We also recommend that Tier 1 is re-titled as 'Large City/Town Centres' in order to regularise the term of reference between Tier 1 and Tier 2 i.e., 'large' and 'small', as opposed to 'main' and 'small'.
- 19.17** We recommend an updated classification of centres as per Figure 19.1 below.

Figure 19.17.1 Recommended Classification of Centres (below Role text is as sent in HOC table sent)

| Tier     | Classification           | Example of Role                                                                                                                                                                                                                                                                                                                                           |
|----------|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>1</b> | Large City / Town Centre | Provides (or has the potential to provide) a broad range of shops, retail and non-retail services (including banks, restaurants etc), businesses, offices, residential, leisure and community and cultural facilities to serve a significant hinterland. It is both the focus for the community and public transport networks.                            |
| <b>2</b> | Small Town Centres       | Provides (or has the potential to provide) a range of shops, retail and non-retail services (including banks, building societies, restaurants etc), businesses, offices, residential and community & cultural facilities to a hinterland which may include neighbouring villages, small settlements and the rural area.                                   |
| <b>3</b> | District Centres         | Provides for (or has the potential to provide) a range of units including retail, office, business, community and cultural facilities to meet local everyday needs. The role of District centres is to remain complementary to the role and function of the town centre within their catchment.                                                           |
| <b>4</b> | Local Centres            | Provides (or has the potential to provide) a small number of shops, mainly for the sale of convenience goods, and other complementary uses including community and cultural facilities, to meet local everyday needs. The role of Local Centres is to remain complementary to the role and function of any higher order centre(s) within their catchment. |

Source: Nexus Planning

- 19.18** Whilst there is no set methodology for defining a retail hierarchy, we have utilised our empirical evidence to assess a range of criteria that, we feel, provides a suitable basis for supporting the proposed hierarchy. Figure 19.2 provides an assessment of each of the twelve centres which have been subject to consideration under this Study. Descriptors that

have been chosen include population (2011 Census), number of units, comparison and convenience goods market share, convenience goods provision (all from our survey work) and community services provision. This list is not intended to be exhaustive, but we consider these to be some of the key characteristics which define the hierarchy described in the POP.

Figure 19.18.1 Retail Hierarchy Indicators

| Centre      | Population<br>(2011<br>census) | No of Units | Market<br>Share –<br>Comparison<br>Goods | Market<br>Share –<br>Convenience<br>Goods | Market Rent   | Community<br>Services <sup>33</sup> | Large Super-<br>markets <sup>34</sup> |
|-------------|--------------------------------|-------------|------------------------------------------|-------------------------------------------|---------------|-------------------------------------|---------------------------------------|
| Armagh      | 14,777                         | 434         | 7.6%                                     | 7.5%                                      | £17.84/sq ft  | LIB, LC, DS,<br>PS                  | 2                                     |
| Banbridge   | 16,637                         | 282         | 7.3%                                     | 2.9%                                      | £12.05/sq ft  | LIB, LC, DS,<br>PS                  | 1                                     |
| Craigavon   | 16,000                         | 70          | 15.6%                                    | 5.3%                                      | £29.49/sq ft  | LC                                  | 1                                     |
| Lurgan      | 25,069                         | 347         | 5.9%                                     | 9.9%                                      | £11.88/sq ft  | LIB, DS, PS,<br>TS                  | 1                                     |
| Portadown   | 22,000                         | 447         | 8.3%                                     | 5.7%                                      | £14.64/sq ft  | LIB, DS, TS                         | 2                                     |
| Keady       | 3,051                          | 81          | 0.7%                                     | 0.6%                                      | £6.33/sq ft   | LIB, DS                             | 0                                     |
| Markethill  | 1,647                          | 44          | 1.3%                                     | 1.1%                                      | Not available | DS                                  | 0                                     |
| Tandragee   | 3,486                          | 62          | 0.4%                                     | 0.4%                                      | £12.95/sq ft  | LIB, DS                             | 0                                     |
| Dromore     | 6,003                          | 98          | 0.3%                                     | 0.1%                                      | £10.90/sq ft  | LIB, DS                             | 0                                     |
| Gilford     | 1,573                          | 43          | 0.0%                                     | 0.1%                                      | £15.39/sq ft  | DS                                  | 0                                     |
| Rathfriland | 2,467                          | 89          | 1.4%                                     | 0.6%                                      | £10.90/sq ft  | LIB, DS                             | 0                                     |
| Legahory    | Unknown                        | 14          | 0.0%                                     | 0.0%                                      | £10.90/sq ft  | DS                                  | 0                                     |

**19.19** Our assessment shows a clear distinction between the largest five centres and the rest of the centres under consideration. Armagh, Banbridge, Lurgan and Portadown all have 280+ retail units, and each attracts a significant proportion of both

<sup>33</sup> Community facilities key = LIB (Library), LC (Leisure Centre), DS (Doctors Surgery), PS within 1 mile (Police Station), TS within 1 mile (Train Station)

<sup>34</sup> Defined as supermarkets with 1,000 sq m + net sales area

convenience and comparison goods market share (5%+, with the exception of convenience retailing in Banbridge). Each also has at least one major supermarket and a wide range of community facilities. Craigavon being a purpose-built centre, does not have the same number of units or the same range of community facilities, but it does have the highest comparison goods market share by some margin, as well as attracting the highest market rents. For these reasons, we agree that each of these centres should be classified at the same tier, and that each would appropriately be considered as a 'main town centre'.

**19.20** The next grouping is Keady, Markethill, Tandragee, Dromore, Rathfriland and Gilford. Each of these centres has between 43-98 units, and attracts a measurable market share in both convenience and comparison goods trade, as well as a range of retail and non-retail services. We classify these centres as 'Small Town Centres'.

**19.21** Legahory is a markedly smaller centre with just 14 retail units, with little discernible market share picked up in the surveys. It does however provide other services and facilities for the local area such as health centre / crèche / community offices etc. We classify the centre as a 'District Centre'.

**19.22** Based on these indicators, we therefore suggest that the hierarchy set out at Figure 19.3 might be appropriate.

Figure 19.22.1 - Recommended Classification of Centres

| Classification                  | Example of Role                                                                                                                                                                                                                                                                                                                                  | Centres                                                               |
|---------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------|
| <b>Large City / Town Centre</b> | Provides (or has the potential to provide) a broad range of shops, retail and non-retail services (including banks, building societies, restaurants etc), businesses, offices, residential, leisure and community & cultural facilities to serve a significant hinterland. It is both the focus for the community and public transport networks. | Armagh<br>Banbridge<br>Craigavon<br>Lurgan<br>Portadown               |
| <b>Small Town Centres</b>       | Provides (or has the potential to provide) a range of shops, retail and non-retail services (including banks, building societies, restaurants etc), businesses, offices, residential and community & cultural facilities to a hinterland which may include neighbouring villages, small settlements and the rural area.                          | Dromore<br>Gilford<br>Keady<br>Markethill<br>Rathfriland<br>Tandragee |
| <b>District Centres</b>         | Provides for (or has the potential to provide) a range of units including retail, office, business, community and cultural facilities to meet local everyday needs. The role of District centres is to remain complementary to the role and function of the town centre within their catchment.                                                  | Legahory                                                              |

|                      |                                                                                                                                                                                                                                                                                                                                                           |                                                                    |
|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------|
| <b>Local Centres</b> | Provides (or has the potential to provide) a small number of shops, mainly for the sale of convenience goods, and other complementary uses including community and cultural facilities, to meet local everyday needs. The role of Local Centres is to remain complementary to the role and function of any higher order centre(s) within their catchment. | Location and boundary of Local Centres to be defined at LPP stage. |
|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------|

Source: Nexus Planning

- 19.23 We have also analysed our empirical household survey work to see if there are any notable market shares derived by other centres beyond the twelve centres that have been the main subject of this Study, with a view that they might be classified in the retail hierarchy as either ‘District Centres’ or ‘Local Centres’. Based on our market share assessment at **Appendix D**, the Council might consider Richhill, Hamiltonsbawn and Middletown if they were looking to define an expanded list of such centres, as each is observed to attract some notable degree of spend from the Study Area. This list should be viewed as being indicative only, as our assessment is based purely on market share analysis and is not informed by site visits.
- 19.24 Separate to this, the Council’s Local Development Plan (LDP) Team has carried out a study to consider if there were any existing centres worthy of designation as a Local Centre or a District Centre in the Plan Area.
- 19.25 Planning is directed by the Strategic Planning Policy Statement (SPPS: NI) in relation to district and local centres that *“Planning authorities should retain and consolidate existing district and local centres as a focus for local everyday shopping, and ensure their role is complementary to the role and function of the town centre. In these centres, extensions should only be permitted where the applicant has demonstrated that no adverse impact will result on town centres in the catchment”* (Paragraph 6.276).
- 19.26 The LDP Team considered all settlements within the Borough to establish whether there were any existing locations that could be considered as potential District / Local Centre designations in the LDP.
- 19.27 Legahory District Centre is the only District Centre currently designated in the extant Area Plans. Currently there are no designated Local Centres in the extant Area Plans.
- 19.28 All potential Local / District Centres were considered against the following assessment criteria:

Criteria for Local Centre designation:

1. Location: Located within settlement development limits and must be beyond the edge of the town centre boundary, where applicable (i.e. more than 300m from the town centre boundary).
2. Clustered form: Clustered compact grouping of units / buildings.

3. Minimum No of Uses / Units: Centre contains a minimum of 1 retail convenience use/unit and 5 other complementary uses / units meeting a local everyday need including community and cultural uses.
4. Residential catchment: Centre serves a surrounding residential catchment.
5. Linkages / Accessibility: Centre is well connected to the surrounding residential area by active travel / public transport options.

Criteria for District Centre designation:

- 19.29 District Centres operate at a higher level than local centres in terms of their offering and catchment. Whilst District Centres also meet a local everyday need, they provide a wider range of everyday services and facilities than local centres. District Centre uses / units include convenience retail and other complementary uses including office, business, and community and cultural uses.
- 19.30 District Centres should also meet requirements 1, 2, 4 & 5 of the Local Centre criteria detailed above.
- 19.31 The LDP will set out the location and boundary of the newly defined Local Centres at the LPP stage.

Villages & Small Settlements:

- 19.32 In addition to defining a network and hierarchy of centres, the SPPS (paragraph 6.277) also directs that LDPs should acknowledge the role and function of rural centres. Villages and small settlements have an important role and function in maintaining a sense of community, and supporting the local needs (i.e. day-to-day needs) of the local community and surrounding rural area, through the provision of a limited range of convenience shops and other complementary uses, such as cultural facilities or community meeting places that are of a scale, nature and design appropriate to the character of the settlement. Whilst it is recognised that such uses can be at the core of sustaining these settlements, and their rural catchments, it is our understanding that the Council no longer proposes defining centres in the Borough's villages, as detailed in the POP, or centres in small settlements, to allow flexibility in considering appropriate proposals that come forward. This followed further consideration by the LDP Team of SPPS direction at paragraph 6.277 as detailed above in relation to rural centres and representations made to the POP. The Council considers that the operational planning policy for retail development in villages and small settlements should support small scale retail development proposals and other complementary uses, in such locations where a local need (i.e. day-to-day needs) has been identified and can be accommodated.

## The Spatial Extent of Centres

- 19.33 Preferred Option ECN 6A of the POP (2018) explains that the Council will "Review and identify Town Centre Boundaries and Primary Retail Cores, where appropriate, accompanied by policy to strengthen town centres".
- 19.34 In this Study, we identify in Section 4 that there is very little evidence of projected capacity for future floorspace, and that, where any capacity does arise (for comparison goods floorspace only), it is very likely to be able to be accommodated within existing vacant units or land. There is therefore no obvious pressure to expand either Town Centre or Primary Retail Core areas to cater for new development. Please also see our discussion on Development Opportunity Sites on this matter.
- 19.35 The question then is one of whether the current boundaries of the legacy Plans for the area are appropriate. The context for defining the spatial extent of centres is set out in Paragraphs 6.280-6.283 of the SPPS. Town centre boundaries enable developers and decision-makers to consider the sequential, impact and needs tests when considering individual proposals for development and/or change of use. It is also relevant for consideration of the impact thresholds (nationally set at 1,000 sq m gross external area under the SPPS).

19.36 The range of potential delineations include:

- a. Primary Retail Core;
- b. Town Centre;
- c. Edge-of-centre; and
- d. Out-of-centre.

19.37 In keeping with the SPPS, edge-of-centre is defined as sites which are within a 300m walking distance of the town centre boundary, whilst out-of-centre is defined as those areas beyond that 300m. Defining suitable town centre boundaries is therefore important in this context.

19.38 The Council must weigh up the advantage of having a sufficiently large, defined area to cater for the likely demands of the range of existing and future town centre uses within a centre, but also, the disadvantages of defining too wide an area, whereby a number of sites which are not suitable for development fall within the edge-of-centre category. A balance must therefore be struck between the two.

19.39 The SPPS directs LDPs to define the spatial extent of town centres and the primary retail core but is silent on the merits or function of the Primary Retail Core. It also requires applications for main town centre uses to be considered in the following order of preference: primary retail core; town centres; edge of centre; and out of centre locations. In judging between sites outside of town centre boundaries, the SPPS states that the measuring or ranking of alternatives should include an assessment of the physical distance and functional linkage of sites with the primary retail core, and other relevant factors.

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

19.41 In general terms, and building on our observations in Section 3, we consider that the future of the High Street is likely to evolve quickly and that there is some danger in being closed to the idea of non-retail uses at ground floor level within the heart of town centres. The shift to online trading and the lasting impacts of the pandemic have accelerated previous thinking on this. Moreover, any application for a change of use would need to be considered through a planning application in any event (where Permitted Development Rights do not apply) and so there is a significant degree of control, even where there is no defined Primary Retail Core. In our view, it is unnecessary to unduly constrain the availability of potentially beneficial and footfall generating sites by defining a Primary Retail Core too widely. This theme is recognised in the Justification text to POP Option ECN 6A where the Council notes that *"Policy restrictions within the Primary Retail Core may be considered inflexible in certain locations and may result in high levels of vacancy, thereby affecting the vitality and viability of our town centres"*.

19.42 Turning therefore to consider the specifics of the Borough, only Armagh, Banbridge, Craigavon, Lurgan and Portadown currently have defined Primary Retail Core under the legacy Plans. Each of these centres is a 'Main Town Centre' under the suggested hierarchy at Figure 19.3, and we consider this to be appropriate. We consider that all other tiers of the hierarchy are likely to need a more flexible approach to manage their uses in the coming years. Please see the discussion below on 'Development Management Policies' for our suggestions on how the policies governing the Primary Retail Cores might operate.

- 19.43 For the same reasons around flexibility, we do not consider that there is any overriding policy requirement to have two layers of protection, and would therefore advocate deleting Primary Shopping Frontages from the Borough's centres. No Primary and Secondary Frontages were delineated in the legacy AAP, and so only Banbridge, Lurgan and Portadown currently have annotated primary retail frontages. We suggest that Primary Retail Frontages (PRF) are omitted in the new Plan.

19.44 We have then looked at amending or delineating centre boundaries for each of the twelve centres:

Figure 19.44.1 Nexus Boundary Recommendation on Boundaries

| Centre      | Centre Boundary                                                                                                                                                                                                                                              | Primary Retail Core (PRC)                                                                                                                                                                 |
|-------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Armagh      | Amend the existing boundary to exclude certain residential and commercial areas that don't relate well to the rest of the centre.                                                                                                                            | Amend the existing boundary to exclude certain areas that are either vacant and/or redundant, or primarily in residential use, or are too distant to be considered to be part of the PRC. |
| Banbridge   | Amend the existing boundary to exclude a vacant site with planning permission for residential use.                                                                                                                                                           | No change is proposed.                                                                                                                                                                    |
| Craigavon   | Amend the existing boundary to exclude a vacant (landscaping) area.                                                                                                                                                                                          | No change is proposed.                                                                                                                                                                    |
| Dromore     | No change is proposed.                                                                                                                                                                                                                                       | n/a                                                                                                                                                                                       |
| Gilford     | No change is proposed.                                                                                                                                                                                                                                       | n/a                                                                                                                                                                                       |
| Keady       | No adopted boundaries are present. Draw a boundary based on the existing location of town centre uses.                                                                                                                                                       | n/a                                                                                                                                                                                       |
| Legahory    | The adopted boundary contains undeveloped land to the south-west of the centre buildings. Replace this to include Legahory Centre, Brownlow Health Centre and Moylinn House, as these buildings provide shops and services which serve local everyday needs. | n/a                                                                                                                                                                                       |
| Lurgan      | Amend the existing boundary to exclude residential and commercial/retail areas that don't relate well to the rest of the centre and include two small areas with a concentration of retail/commercial properties.                                            | Amend the existing boundary to exclude a residential area that does not relate well to the rest of the PRC.                                                                               |
| Markethill  | No adopted boundaries are present. Draw a boundary based on the existing location of town centre uses.                                                                                                                                                       | n/a                                                                                                                                                                                       |
| Portadown   | Amend the existing boundary to exclude a mainly residential area that doesn't relate well to the rest of the centre.                                                                                                                                         | Amend the existing boundary to exclude an area hosting light industry uses and car parks.                                                                                                 |
| Rathfriland | No change is proposed.                                                                                                                                                                                                                                       | n/a                                                                                                                                                                                       |
| Tandragee   | No adopted boundaries are present. Draw a boundary based on the existing location of town centre uses.                                                                                                                                                       | n/a                                                                                                                                                                                       |

19.45 Our proposed revised boundary plans are contained at **Appendix E**.

## Development Management Policies

19.46 In light of our findings in this Study, we set out below a series of recommended policy themes for consideration under the emerging Local Development Plan. The LDP Team will draft the final planning policies to be contained within the Plan.

### Retail Hierarchy and the Town Centre First Approach

- 19.47 The Council should adopt a 'retail hierarchy' as broadly shown at Option ECN 5A of the POP (2018). Our reasoned changes to the hierarchy proposed in the POP are set out at Figure 19.22.
- 19.48 Linked to this, we recommend that the draft policy seeks to enshrine a 'town centre first' approach by including criteria which:
- a. Support proposals which promote the identified centres as the preferred locations for town centre uses, including retail, leisure, office, and appropriate residential and community and cultural facilities. A particular emphasis should be placed on residential living. Our work has found that a large number of the centres suffer from a lack of activity in the evenings. By encouraging more residential living in town centres, footfall is created for both the daytime and night-time economy. One way of creating additional residential living in town centres is to consider whether there is excess supply of office accommodation, which is especially pertinent in the wake of the pandemic;
  - b. Ensure that development proposals are in keeping with the defined role of each centre (our definitions for each Tier of centre are set out in Figure 19.3); and
  - c. Stipulate that the retail hierarchy is the starting point for the consideration of retail impact and the sequential test, where proposals for town centre uses outside of town centre locations is concerned.

### Proposals for the Loss of Town Centre Uses in Town Centre Locations

- 19.49 The Council should draft a policy which governs existing retail units and their potential loss to other uses. For the reasons we have detailed above, we consider that this policy should focus on the Primary Retail Cores, with a more flexible approach adopted in areas outside of Primary Retail Cores, but within Town Centre boundaries.
- 19.50 Policy governing the Primary Retail Core in Armagh City, Banbridge, Craigavon, Lurgan and Portadown, should suggest a measure by which the loss of retail units may be acceptable. This would, presumably, only be in circumstances whereby any reduction in the quantum of retail floorspace would not a) adversely harm the vitality and viability of the centre, b) demonstrably decrease footfall and linked trade throughout the centre, and/or c) that a period of marketing should be appropriately evidenced to demonstrate that there is no demand for the unit under its existing permitted use (we suggest that 6 or 12 months may be appropriate).
- 19.51 Outside the Primary Retail Cores of these City/Town Centres, and in all other town centres in the Borough, we recommend that the Council pursues a more flexible policy which recognises the evolving nature of town centres and which seeks to ensure an appropriate balance of uses which does not undermine the vitality and viability of the Centre. In particular, we recommend that residential, leisure and commercial uses are welcomed in Centres in order to create and sustain footfall, provided they do not critically undermine the retail component. The Council may wish to monitor the amount of A1 retail present in each centre annually, as well as the level of vacancy within any given centre, in order to guide their views on planning applications for changes of use.<sup>35</sup>

<sup>35</sup> It is noted that overall, across all the assessed centres (sections 6 to 17) the vacancy rate is 21.5% which is much higher than the UK Average of 13.8%. The reasons behind this are multifarious and would need to be investigated on a centre-by-centre basis. Contributing factors typically include: general overprovision of retail and leisure uses across the UK; the units not being fit for purpose (such as due to dereliction, unit size and infrastructure criteria etc), insufficient funds or levels of investment; competition from other location including those out of centre; the legacy of 'the Troubles' in NI and its effect on town centres vitality & viability; the wider offer of the centre and its USP, and the cost rates and rent.

## Proposals for Town Centre Uses in Out-of-Centre Locations

### Standard Tests

- 19.52 The Council should word a policy which seeks to implement the ‘centres first’ themes of the SPPS. This should incorporate impact, need and the sequential tests. In drafting the policy, the following themes should be explored:

#### 1. The Sequential Test

- The SPPS sets out the sequential test in paragraphs 6.280 and 6.281.

The SPPS explains at 6.287 that *“In judging between allocations on non primary area sites, preference will be given to edge of town centre land before considering out-of-centre sites. For a site to be considered as edge-of-centre a default distance threshold of 300 metres from the town centre boundary should apply. Councils may set other thresholds to take account of local issues such as constrained areas and topography. The measuring or ranking of alternatives should include an assessment of the physical distance and functional linkage of sites with the primary retail core, and other relevant factors”*. The Council are proposing Primary Retail Cores (PRC) within the Large Town Centres. The Council will need to consider how the PRCs function within the sequential test in their emerging policies.

- This accords with 6.281 of the SPPS which explains that applications for main town centre uses should be considered in an order of preference, with primary retail cores coming first and then town centres second. When considering edge of centre and out of centre proposals, preference should be given to accessible sites which are well connected to either the PRC or Town Centre boundary respectively.
- In considering sequential candidate sites, applicants and local planning authorities should demonstrate flexibility on issues such as format and scale, so that opportunities to utilise suitable town centre or edge of centre sites are fully explored.
- The suitability, availability and viability of sequential candidate sites are to be explored on a case-by-case basis, in the context of the application in question.
- In making judgments, the Council should be cogent of prevailing case-law at the time a decision is made. For example, the Dundee decision is often quoted when considering the application of the sequential test across the UK. That decision, made by the Supreme Court, told us that the appropriate question to consider when considering the suitability of a site, is whether an alternative site is available for the development proposed and not whether the proposed development could be altered or reduced so that it can be made to fit other sites.
- A further dimension of the sequential test is to consider its application between centres. First and foremost, the sequential test is only applicable to applications for main town centre uses which are not in an existing centre. Therefore, applicants of a scheme, for example, within the Keady Town Centre boundary would not have to consider the availability of suitable sites within the Armagh City Town Centre boundary, even though Armagh City sits above Keady in the proposed retail hierarchy.
- The matter is more complicated, though, where out-of-centre locations are considered. In certain circumstances, it is appropriate to ask applicants for out-of-centre proposals, to consider the availability of suitable sites within higher-order centres. Using the same example as before, it would, in theory, be appropriate to consider whether an out-of-centre proposal in Keady could be located, instead, within the centre boundary of Armagh City Centre as well as Keady Town Centre. However, there is an element of judgment involved here and we note that this

matter is not covered under the SPPS, and so, we are reliant on general practice. Of some help is Paragraph 11 of Planning Policy Guidance in England, which suggests that “Use of the sequential test should recognise that certain main town centre uses have particular market and locational requirements which mean that they may only be accommodated in specific locations. Robust justification must be provided where this is the case, and land ownership does not provide such a justification”. We would recommend this broad approach to the Council. The onus should be on the applicants, on a case-by-case basis, to demonstrate that their requirement is locationally-specific. Adopting again our example above, an instance of this might be where there is a demonstrable need for a particular type of good in Keady, which local residents currently have to make unsustainably long round-trips elsewhere for. In the absence of such a case though, the Council would be within its right to request that central sites in higher-order centres should also be considered under the sequential approach.

## 2. Impact and Need Test

- Paragraphs 6.283 and 6.290 of the SPPS set the Impact Test. Paragraph 6.283 considers the Needs Test.
- Applications for retail or town centre type developments which are over 1,000 square metres (gross external area) and which are in edge-of-centre and out-of-centre locations and on sites that do not benefit from site-specific allocation for these uses, must demonstrate that they will not result in a significantly adverse impact on the relevant Town Centres within their catchment area.
- We have considered whether there would be any cause to seek to lower the SPPS set impact and need test threshold of 1,000 sq m gross external area, and see no reason to do so in the Borough. Lower local thresholds have been introduced elsewhere in the UK where the national threshold is much higher (2,500 sq m gross) and/or where there is considerable concern over the health of a number of centres. Based on our market share survey and health-check findings, and whilst there is evidence of higher vacancy levels in some centres, we do not consider that the circumstances exist in the Borough which would warrant moving away from the SPPS set threshold.
- As previously outlined, the Council has produced a ‘District/Local Centres Study’ and based on this emerging evidence, it may be possible to set an impact / floorspace threshold for small-scale proposals in District / Local Centres (tiers 3 & 4 of the suggested retail hierarchy).
- The Council may also wish to adopt a policy which seeks to ensure that the sub-division of large out-of-centre retail and leisure floorspace is subject to impact assessment. It would be a concern if out-of-centre locations sought to provide a scale of footprint which mirrors one of the current niches of a town centre, i.e. small footprint units suitable for start-up, high-end or service uses. As the economic pressures, described in Section 3, begin to effect even out-of-town retail parks, such proposals are becoming more commonplace across the UK.
- The SPPS explains that Impact and Need assessments should take account of both quantitative and qualitative factors, and be proportionate to the nature of development. Beyond this, the needs test in particular, is not well defined in SPPS. Paragraph 6.282 of the SPPS states that: ‘This may incorporate a quantitative and qualitative assessment of need taking account of the sustainably and objectively assessed needs of the local town and take account of committed development proposals and allocated sites’.
- Our suggestion is that the quantitative needs assessment should be based on the capacity findings of this study, supplemented as relevant by any further updates and/or any evidence provided by applicants. The

qualitative need dimension should comprise an assessment of evidence to support either the type of goods to be sold/provided from the unit (i.e. gap analysis), or for the size of unit proposed.

### Boulevard Outlet Shopping Park

- 19.53 We understand from the Council that the Boulevard Outlet Shopping Park was developed in line with the BNMAP 2015 Plan which allocated the area for a mixed-use development as restricted under Zoning BE 35, preventing Class A1: Shops (except for Factory outlet Centre or retail warehouse) Park and Class C1: dwelling houses. Whilst the original planning permission for the above was granted under Q/2004/0482/F (restricting the sale of goods to discounted), multiple planning permissions have been granted since. Given the complex planning history, we would recommend that the Council keeps a clear record of what constitutes the operative consent at the site, and how the sale of goods is restricted.
- 19.54 Boulevard Outlet Shopping Park opened in 2007. It currently hosts 49 operators. These are predominantly comparison goods units, although there are also seven food & beverage units and a cinema. The Shopping Park functions differently to Banbridge Town Centre as its offer predominantly consists of national multiple retailers, as opposed to independent traders. There is a strong focus on fashion retailers. The limited food and beverage offer is designed to cater for the needs of those visiting the park for shopping purposes (as opposed to being an attraction in its own right). However, with the Shopping Park being located adjacent to Bridgewater Retail Park (which hosts The Range, Tesco Extra, Home Bargains and M&S Food), there is a strong overall offer of convenience goods in this general location.
- 19.55 Together, the surveys show that Boulevard Outlet Shopping Park and Bridgewater Retail Park draw £92.4m of retail expenditure from the Study Area, making it the biggest out-of-centre attraction. Whilst this draw is 22% less than that of Banbridge Town Centre (£118.2m), it is notable that a significant number of units at the Boulevard Outlet Shopping Park are currently vacant<sup>36</sup> and that Bridgewater Retail Park has planning permission for expansion. This suggests that there is potential for the market share attracted to this location to increase significantly in the future. On the basis that this Study identified the Banbridge Built-Up Area to have no expenditure capacity to support additional retail floorspace, there is a general concern that Boulevard Outlet Shopping Park (together with Bridgewater Retail Park), could create significant competition for (and therefore negatively impact on) Banbridge Town Centre (as well as other centres in the Borough), if its growth is not carefully monitored and managed.
- 19.56 Based on the above, it is considered that Boulevard Outlet Shopping Park (together with Bridgewater Retail Park) should be classed as out-of-centre destinations. To include these locations within the retail hierarchy would mean that further expansion may be possible without the need for adherence with the impact, needs and sequential tests. This would be highly likely to be detrimental to Banbridge Town Centre, as well as potentially other centres nearby.

### Direction for Retail Development

#### Convenience Floorspace

- 19.57 In line with our findings in Section 4, our quantitative assessment of capacity found there to be no capacity to support further convenience goods floorspace across the Borough when considered as a whole, by 2035. However, our examination of how capacity might divide among the areas of the Borough has shown that Lurgan Built-Up Area does have a quantitative capacity for between 2,992 sq m net and 4,069 sq m. Caution should be exercised here though, as whilst the local position is that there is an identified capacity, the Borough-wide position is that there is not enough money in the system to support all existing traders. Furthermore, a larger proportion of the capacity identified arises because of the overtrading position of the town centre Tesco store, and any further foodstore provision would necessarily be complementary to the Tesco rather than unduly harmful to it. The scale and function of any future provision in Lurgan

<sup>36</sup> Based on the layout plan on the Boulevard's [website](#)

must therefore be considered very carefully. As such, we do not recommend that any sites are brought forward as part of the Local Plan to accommodate convenience retailing. It may though be appropriate to review the position in Lurgan towards the end of the Plan period, especially if a compelling need case can be made, and assuming that there would be no demonstrable harm to the exiting Town Centre.

## Comparison Floorspace

- 19.58 Our quantitative assessment of capacity also found a relatively small amount of capacity for comparison goods floorspace, amounting to between 4,006 and 6,296 sq m net by 2035. As we have previously pointed out, the fact that there is comparison goods capacity does not equate to need, and consideration of impact is highly relevant. In saying this, we are mindful that the household telephone survey did not suggest any significant discontent with the Borough's comparison goods shopping facilities (noting a 77.8% retention rate in the Inner Study Area).
- 19.59 As such, we do not consider it necessary to trigger a 'Call for Sites' consultation. However, our review of how the capacity divides among the areas of the Borough leads us to the following recommendations:
- a. **Craigavon Town Centre** – Our quantitative assessment of capacity shows that the majority of the identified capacity sits within Craigavon Built-Up Area (between 1,883 sq m and 2,959 sq m net). As such, we would recommend that the majority of new retail floorspace is directed to Craigavon Town Centre. The Town Centre does not currently have any Development Opportunity Sites identified. As such, opportunities for intensification should be explored further with landowners.
  - b. **Portadown Town Centre** – Our assessment shows that the second largest capacity quantum sits in Portadown Built-Up Area (between 1,131 sqm net and 1,777 sqm net). As such, we would recommend that new retail floorspace is also directed to Portadown Town Centre. The Centre has four previously identified Development Opportunity Sites within the adopted Town Centre boundary and the figure below undertakes a high-level review of these sites. Based on this we concluded that only Site P3 and P4 are suited for retail development subject to any constraints such as flooding:
    - P3 is adjacent to the proposed Primary Retail Core area and provides an opportunity to bring forward a riverside development thus unlocking a further potential selling point for Portadown Town Centre. It is also in close proximity to the train station.
    - P4 is within the proposed Primary Retail Core area, and relates well to the existing primary retail frontage and is in close proximity to the train station;
  - c. **Armagh City Centre** - Our assessment found a small amount of capacity for comparison goods floorspace in Armagh Built-Up Area (between 443 sq m and 697 sq m net). This very modest level of capacity does not require the allocation of sites, but we recommend that any future applications in Armagh Built-Up Area are directed towards Armagh City Centre.
  - d. **Other Areas in the Borough**<sup>37</sup> - Lastly, our assessment also found a small amount of capacity for comparison goods floorspace in Other Areas in the Borough (between 540 sq m and 849 m net) i.e. outside of Armagh, Banbridge, Craigavon, Lurgan and Portadown Built-Up Areas. This modest level of capacity does not require allocation of sites (which in turn means that any DOSs in these areas do not need to be reviewed as part of this

<sup>37</sup> Please refer to Appendix D Table 17a for the definition of what is included by the term "Other Areas in the Borough". For ease this does include Dromore LTC, Gilford LTC, Keady LTC, Legahory DC, Markethill LTC, Rathfriland LTC, Tandragee LTC, as well as some out of centre locations.

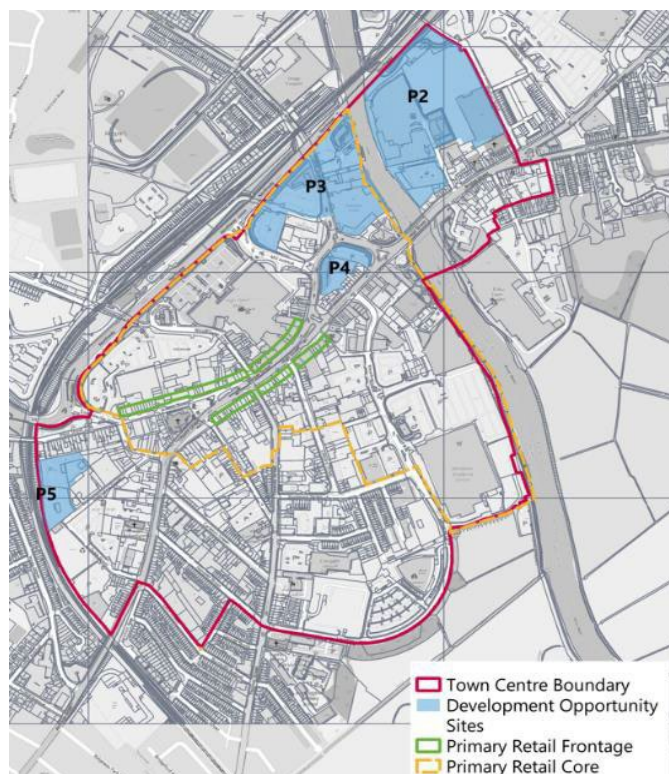
study), and we recommend that any future applications are assessed on case-by-case bases in line with policy recommendations set out earlier in this section.

- 19.60 To confirm, no comparison capacity has been identified in the **Banbridge** and **Lurgan** Built-Up Areas. This in turn means that any DOSs in these areas do not need to be reviewed as part of this study.
- 19.61 As part of our health-check work, we have also looked at outdoor and farmers markets. The quality and offer of a market can give an indication as to whether a centre is vital and viable. The household survey shows that only around 15% of residents in the Study Area chose to visit outdoor/farmers markets in general. As such, there is a general opportunity to improve markets throughout the Borough. We would recommend that a Market Strategy is developed for the Borough.

Figure 19.61.1 High Level Review of Portadown Town Centre (as adopted) Development Opportunity Sites

| Ref | Nexus Review                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| P2  | The site appears to be occupied by light industry uses and car parks. It is bound by the river to the west. It is approximately 600m (8min walk) from Portadown train station. It is outside of the existing/proposed Primary Retail Core area, and also c. 300m from the existing primary retail frontage. CAP 2010 designates P2 for mixed use or individual uses of retailing/ office/ leisure/ housing. CIDF (2010) proposed leisure/community uses and commercial/residential use on the site, with a hotel; a new pedestrian bridge is proposed to link with DOS P3.   |
| P3  | The site appears to be occupied by light industry uses and car parks; bound by the river to the east. It is approximately 350 m (4 min walk) from the Portadown train station. It is within the existing Primary Retail Core and is adjacent to that proposed, and is also c. 130 m from the existing primary retail frontage. CAP 2010 designates P3 for mixed use or individual uses of retailing/office/leisure/housing/cultural. CIDF (2010) proposed commercial/residential use on the site, with a transport interchange; a new pedestrian bridge to link with DOS P2. |
| P4  | The site appears to be occupied by light industry uses and car parks. It is approximately 350 m (4 min walk) from the Portadown train station. To the southeast the site is bound by existing retail uses. It is within the existing/proposed Primary Retail Core and is adjacent the existing primary retail frontage. CIDF (2010) proposed commercial/residential use on the site, with car parking. CAP 2010 designates DOS P4 as suitable for mixed use or individual uses of retailing/office/leisure/residential/ community uses.                                      |
| P5  | The site appears to be occupied by light industry uses, and is bound by the railway line to the west. It is outside of the existing/proposed Primary Retail Core area, and also c. 200 m from the existing primary retail frontage. CIDF (2010) proposed medium sized footprint for workspace/light workshops. CAP 2010 designates DOS P5 as suitable for mixed use or individual uses of retailing/office /housing on the site.                                                                                                                                             |

Figure 19.61.2 Plan of Development Opportunity Sites in adopted Town Centre Boundary



### Direction for Leisure Development

- 19.62 Neither our qualitative, nor quantitative assessment of leisure need identified any significant gaps in the provision of larger commercial leisure facilities in the Borough. Please refer to Section 4 for a full discussion of this.
- 19.63 Notwithstanding our capacity assessments, there is clearly a level of dissatisfaction with the provision of facilities for children in the Borough as a whole and the Council should note this in their plan-making activity.
- 19.64 Looking at the number of leisure units present in the assessed centres, all have a lower amount (averaging at 16.7%) compared to the UK Average (25.2%). As such, there is a general opportunity to improve the overall provision. We have also found that all centres could perform better in respect of the night-time economy.

### Other Supporting Uses

- 19.65 It is important to highlight the key roles that our urban parks fulfil in terms of environmental quality and providing a neutral place to meet other people as part of community life. Parks can generate footfall for town centre businesses, offer venues for cultural or recreational events and provides green areas to fight pollution and encourage biodiversity. Parks within or adjacent to ABC Towns include Lurgan Park, Portadown Peoples Park, Portadown Canal Towpath, Armagh Palace Demesne & Mall, Banbridge Solitude Park & riverside walk, Dromore Town Park & riverside walk, Gilford Riverside Trail & Stramore Park, Rathfriland Community Centre & Play Park, Keady Glen & Walk, Tandragee Cushier riverside walk & Clare Glen Park and Gosford Forest Park, Markethill.
- 19.66 The Council has produced an 'Active Travel Masterplan' which considers active travel (pedestrian and cycle) between Portadown railway station and Lurgan railway station along the Craigavon greenway (principally using the Craigavon 'black paths' network) with connections to the Carn / Seagoe employment areas. It also considers the provision of public bicycle parking in our city / main towns. Additionally, the Council is preparing a new car parking strategy for our city / main towns to consider parking provision, location, cost & access. It is hoped that these studies, and the actions derived from them, will continue to enhance the role of ABC's town centres into the future.

### Concluding Comments

- 19.67 This Study has addressed the current market shares and vitality and viability of twelve centres within the Borough. We have provided a range of advice in respect of the plan-making process.
- 19.68 Notwithstanding our advice, the global, UK and Northern Irish economy is undergoing a significant change at the time of writing, as the economy recovers slowly from the pandemic and the fall-out from Brexit is not yet fully known. We recommend that the Council therefore seeks to monitor the overall situation regarding its retail centres carefully and, potentially, puts in place a further 'light touch' review of both the health of its centres during the course of 2023/2024.

## Glossary of Terms

|                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Built-Up Area</b>          | As defined by Nexus for the purposes of reporting of market shares and capacity assessment. This typically includes developed/urbanised land naturally associated with each settlement/town.                                                                                                                                                                                                                                                                   |
| <b>Capacity</b>               | Forecast resident spending within the catchment area, with which to support existing and additional retail floorspace.<br><br>Source: Planning Portal (England & Wales)                                                                                                                                                                                                                                                                                        |
| <b>Comparison Goods</b>       | Retail items not bought on a frequent basis, for example, televisions and white goods (fridges, dishwashers etc.).<br><br>Source: Planning Portal (England & Wales)                                                                                                                                                                                                                                                                                            |
| <b>Convenience Goods</b>      | Everyday essential items, such as food.<br><br>Source: Planning Portal (England & Wales)                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Edge-of-Centre</b>         | For a site to be considered as edge-of-centre, a default distance threshold of 300 metres from the town centre boundary should apply. Councils may set other thresholds to take account of local issues such as constrained areas and topography. The measuring or ranking of alternatives should include an assessment of the physical distance and functional linkage of sites with the primary retail core, and other relevant factors.<br><br>Source: SPPS |
| <b>Expenditure</b>            | Average annual expenditure levels for various forms of goods, multiplied by the population within the defined Study Area.                                                                                                                                                                                                                                                                                                                                      |
| <b>Expenditure per Capita</b> | The amount of money spent on retail goods per person in each Zone across the Study Area.                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Experian (MMG3)</b>        | A population, expenditure and socio-demographic dataset that utilises the 2011 Census release, projected forward by using growth rates derived from Office for National Statistics projections and current age and gender estimates.                                                                                                                                                                                                                           |

|                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Financial &amp; Business Services</b> | <p>An Experian Goad category comprising the likes of banks, building societies, employment agencies, legal services, estate agents and business services. Please note that Goad categorisations do not directly correspond with the Planning (Use Classes) Order (NI) 2015 definitions.</p> <p>Source: Experian Goad</p>                                                                                                                                          |
| <b>Independent Retailers</b>             | <p>Retailers with less than 10 outlets/ stores.</p> <p>Source: Experian</p>                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Leisure Services</b>                  | <p>An Experian Goad category for town centre leisure units which includes bars, cafes, cinemas, nightclubs, take-aways, hotels, public houses and restaurants. For clarity, it does not include facilities for leisure pursuits e.g. sports centres, swimming pools or health &amp; fitness clubs. Please note that Goad categorisations do not directly correspond with the Planning (Use Classes) Order (NI) 2015 definitions.</p> <p>Source: Experian Goad</p> |
| <b>Main Town Centre Uses</b>             | <p>Cultural and community facilities, retail, leisure, entertainment and businesses.</p> <p>Source: SPPS, footnote 58</p>                                                                                                                                                                                                                                                                                                                                         |
| <b>Market Share</b>                      | <p>The proportion of residents that visit a particular retail destination derived from household survey results.</p>                                                                                                                                                                                                                                                                                                                                              |
| <b>National Multiple</b>                 | <p>Defined as retailers with ten or more stores/outlets.</p> <p>Source: Experian</p>                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Primary Retail Core</b>               | <p>Defined area where retail development is concentrated.</p>                                                                                                                                                                                                                                                                                                                                                                                                     |

|                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Primary retail frontages</b> | Primary retail frontages are areas that include a high proportion of retail uses.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Retail Floorspace</b>        | <p>Total floor area of the property that is associated with all retail uses in square metres. May be expressed as a net figure (the sales area) or in gross (including storage, preparation and staff areas).</p> <p>Source: Planning Portal (England &amp; Wales)</p>                                                                                                                                                                                                                                                                                                  |
| <b>Retail Impact</b>            | The potential effects of proposed retail development upon existing shops. Source: Planning Portal (England & Wales)                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Retail Services</b>          | <p>An Experian Goad category comprising the likes of dry cleaners, health &amp; beauty, opticians, photo processing, post offices and travel agents. Please note that Goad categorisations do not directly correspond with the Planning (Use Classes) Order (NI) 2015 definitions.</p> <p>Source: Experian Goad</p>                                                                                                                                                                                                                                                     |
| <b>Sequential Tests</b>         | <p>Suitable – whether a site is suitable for the land use proposed and/or would conflict with nearby uses.</p> <p>Viable – whether it is realistically possible for the site to be brought forward for the land use proposed without causing the applicant costs which would render the development unviable, or would impose upon the applicant a trading location which would result in unviable trading conditions.</p> <p>Available – whether a site is available, or can be made available, within a reasonable timeframe.</p> <p>Source: Nexus interpretation</p> |
| <b>Sales Density</b>            | Turnover, per square metre. Various retail planning sources such as Verdict UK Food & Grocery Company Briefing Reports and Mintel Retail Rankings provide average (or benchmark) sales densities for national multiple convenience retailers.                                                                                                                                                                                                                                                                                                                           |

|                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Special Forms of Trading</b> | <p>Special forms of trading (SFT) are defined as sales via the internet mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies.</p> <p>Source: Experian</p>                                                                                                                                                                                                                                                                      |
| <b>Trade draw</b>               | <p>The proportion of trade that a development is likely to receive from customers within and outside its catchment area. It is likely that trade-draw will relate to a certain geographic area (i.e. the distance people are likely to travel) and for a particular market segment (e.g. convenience retail). The best way of assessing trade draw where new development is proposed is to look at existing proxies of that type of development in other areas.</p>                                                                             |
| <b>Turnover</b>                 | <p>Amount of sales per unit area of retail floorspace. Source: Planning Portal (England &amp; Wales)</p>                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Town Centre</b>              | <p>Area defined on the local authority's proposal map, including any primary retail core and areas predominantly occupied by main town centre uses. References to town centre or centres apply to Large City/Town Centres, Small Town Centres, District Centres and Local Centres, but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Development Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.</p> |



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