Local Development Plan - Position Paper

Town Centres and Retailing

Ards and North Down Borough Council

CONTENTS

Executive Summary

This Position Paper provides an overview of the baseline evidence in relation to Town Centres and Retailing in Ards and North Down with a view to the key issues within the Borough.

It is important to stress that in compiling the Position Paper the best information available has been used and will be revised as necessary in light of the release of any new data.

This paper and subsequently the views of Members will provide a foundation on which work can commence on a Preferred Options Paper (POP). The POP is the earliest stage of plan preparation and will form the basis for consulting with the public and stakeholders on a range of options for dealing with key issues in the Borough.

Any future decision making will be made within the context of a Sustainability Appraisal under the provision of Planning (Northern Ireland) Act 2011.

Introduction

1.1 The aim of this paper is to provide baseline evidence to inform and enable meaningful participation in the upcoming Local Development Plan (LDP) Workshop on Town Centres and Retailing.

1.2 Town centres operate not only as the commercial heart of a town but also as the focus for service, entertainment, leisure, cultural and civic activities. These other main town centre uses are playing an increasingly important complementary role to traditional retail uses as they enable activity levels to be sustained at different times of the day and throughout the week. Increasingly the most successful urban centres are vibrant, diverse and alive with activity.

1.3 ‘Retailing’ is generally understood to encompass those land uses outlined within Class A1 (Shops) of the Planning (Use Classes) Order (Northern Ireland) 2015. This includes land uses for the retail sale of goods (other than hot food) and can be further broken down into convenience and comparison retail. Convenience retailing relates to the sale of essential non-durable items which are typically bought and consumed on a frequent basis e.g. food, drinks, tobacco, newspapers, magazines, cleaning materials and toiletries. Comparison retailing relates to the sale of non-convenience durable goods which are purchased more infrequently and may be considered luxury or lifestyle items. These include clothing, footwear, books, furniture, and electrical goods. Class A1 also includes the provision of retail services to visiting members of the public such as post offices, hairdressers, launderettes and repair shops etc.

Regional Planning Policy Context

Regional Development Strategy (RDS) 2035

2.1 The RDS 2035 acknowledges that our places have unique identities and that these should be recognised and built upon and enhanced. Its Regional Guidance supports urban and rural renaissance and states that regeneration is necessary to create more accessible, vibrant town centres which offer people more local choice for shopping, social activity and recreation[1].

2.2 Through its Spatial Framework Guidance the RDS specifically advocates:

- promotion of the regeneration of Bangor;
- expanding the employment and retail base to serve the catchment; and
- widening Bangor's economic base as a means to reduce its role as a dormitory town[2].

2.3 The RDS recognises the long established reputation of Newtownards as a prime retail destination, with a vibrant mix of high street and independent shops[3].

Strategic Planning Policy Statement (SPPS)

2.4 The Strategic Planning Policy Statement (SPPS) was published by the Department of the Environment (DOE) in September 2015. 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.'

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[1] RDS 2035 – RG7, page 40.
[2] RDS 2035 – SFG 1, page 56.
[3] RDS 2035 – para. 3.86, page 72.

2.5 The SPPS Regional Strategic objectives for town centres and retailing are to:

- secure a town centres first approach for the location of future retailing and other main town centre uses[4];
- 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 The SPPS sets out that Local Development Plans should:

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

[4] Includes cultural and community facilities, retail, leisure, entertainment and businesses.

2.7 In respect of office provision, the Regional Strategic Policy contained within the SPPS states that in larger settlements appropriate proposals for Class B1 business uses (such as offices and call centres) should be permitted if located within city or town centres, and in other locations that may be specified for such use in a LDP, such as a district or local centre.

Extant Area Plans

North Down and Ards Area Plan 1984-1995 (NDAAP), Belfast Urban Area Plan, draft Belfast Metropolitan Area Plan 2015 (dBMAP) and Belfast Metropolitan Area Plan 2015 (BMAP)

3.1 The Belfast Metropolitan Area Plan 2015 was prepared under the provisions of Part 3 of the Planning (Northern Ireland) Order 1991 by DOE. The Plan was adopted on 9 September 2014, however that adoption has since been quashed as a result of a judgment in the Court of Appeal delivered on 18 May 2017.

3.2 As a consequence of this, the North Down and Ards Area Plan 1984-1995, the Belfast Urban Area Plan, and Bangor Town Centre Plan 1995 are now the statutory Development Plans for the North Down area with draft BMAP remaining a material consideration.

3.3 Draft BMAP 2015 sets out a retail hierarchy for the North Down area including Primary Retail Cores/Frontage, Town Centres, and District Centres. This includes the designation of Primary Retail Cores and Town Centres for Bangor and Holywood with the addition of a Primary Retail Frontage for Bangor. Within draft BMAP the policy for Primary Retail Cores resists non-retail uses at ground floor and outside designated primary retail cores and within town centres, retail will only be acceptable where it can be demonstrated that there is no suitable site for the proposed development within the Primary Retail Core. This is to support the vitality and viability of our town centres by ensuring they are the main focus for all retail developments. Primary Retail Frontages comprise those parts of a town centre which should predominately be retained in retail use. The policy within draft BMAP will resist proposals for non-retail uses at ground floor level within Primary Retail Frontages in order to retain the focus of retail uses and ensure the maintenance of a compact shopping environment.

3.4 Following the Public Inquiry to draft BMAP, it was recommended that the retail policy was strengthened within Primary Retail Cores and Primary Retail Frontages so that no more than 25% of the frontage of the shopping street(s) to which it relates is in non-retail use and no more than three adjacent units are in non-retail use. Outside designated Primary Retail Cores, planning permission will only be granted for comparison and mixed retail development where it can be demonstrated that there is no suitable site within the Primary Retail Core.

3.5 Draft BMAP also designates two District Centres at Bloomfield and Springhill which are intended to co-exist with the town centres and fulfil a complementary role.

3.6 The BMA Office Strategy includes the promotion of office development in Bangor and Holywood town centres in order to protect and enhance their vitality and viability, to assist urban renaissance and to provide jobs in local areas. It also provides for office development of an appropriate scale within designated shopping/commercial areas in order to provide local services. (BMA Office Strategy and Policy OF 1, p. 88-90, Part 3 Volume 1 Plan Strategy & Framework).

Ards and Down Area Plan 2015

3.6 The Ards and Down Area Plan 2015 (ADAP) sets out the retail hierarchy for the former Ards Borough Council area including the designation of a Primary Retail Core and Town Centre for Newtownards and Town Centres for Donaghadee and Comber. Local Centres are designated at Stratheden Heights and Scrabo Estate in Newtownards. There are no designated District Centres.

Council Plans and Strategies

The Council's Corporate Plan 2015-2019

4.1 The Corporate Plan sets out the overall strategic direction for the Council in the 2015-19 period. The vision outlined in the Corporate Plan is that Ards and North Down will be a place to be proud of which is more prosperous, vibrant, healthy, sustainable and where people enjoy an excellent quality of life. Under the objective of 'Prosperity' the Corporate Plan aspires to: attract and promote investment; supporting business start-up, development and growth; enhance the visitor experience to increase visitor spend; and develop a thriving rural economy. These aspirations have direct relevance to the topic of Town Centres and Retailing. Indirectly linked are the aspirations to increase pride in the Borough under the objective of 'People' and to enhance our towns, villages and coastlines under 'Place'.

The Big Plan for Ards and North Down – Creating Positive Outcomes for Everyone 2017-2032

4.2 The Big Plan provides an overarching framework setting out a shared vision and ambition that Ards and North Down's Strategic Community Planning

Partnership has agreed to work towards over the next 15 years. It contains five outcomes which are ambitious statements that the Council aspire to accurately reflect the situation of the people who live in Ards and North Down by the year 2032.

4.3 The most appropriate outcome linked to Town Centres and Retailing is Outcome 4, that 'All people in Ards and North Down benefit from a prosperous economy'. The plan states that 'we will work towards this outcome by addressing deprivation and ensuring people have the financial resources to meet their everyday needs by growing a sustainable economy with a skilled workforce, access to employment and effective economic investment'.

4.4 There are also indirect linkages to Outcome 2 'All people in Ards and North Down enjoy good health and wellbeing' and Outcome 5, 'All people in Ards and North Down feel pride from having access to a well-managed sustainable environment'.

The Integrated Strategy for Tourism, Regeneration and Economic Development

4.5 The Integrated Strategy for Tourism, Regeneration and Economic Development takes its cues from the Borough's Community Plan and identifies six thematic priorities. The thematic priorities of most relevance to town centres and retailing are:

- promote to attract investment;
- equip with skills and spaces;
- excel in quality and value; and
- nurture our assets.

These thematic priorities provide a framework within which specific actions are identified as being of strategic importance to the Borough.

Town Centres and Retailing Profiles

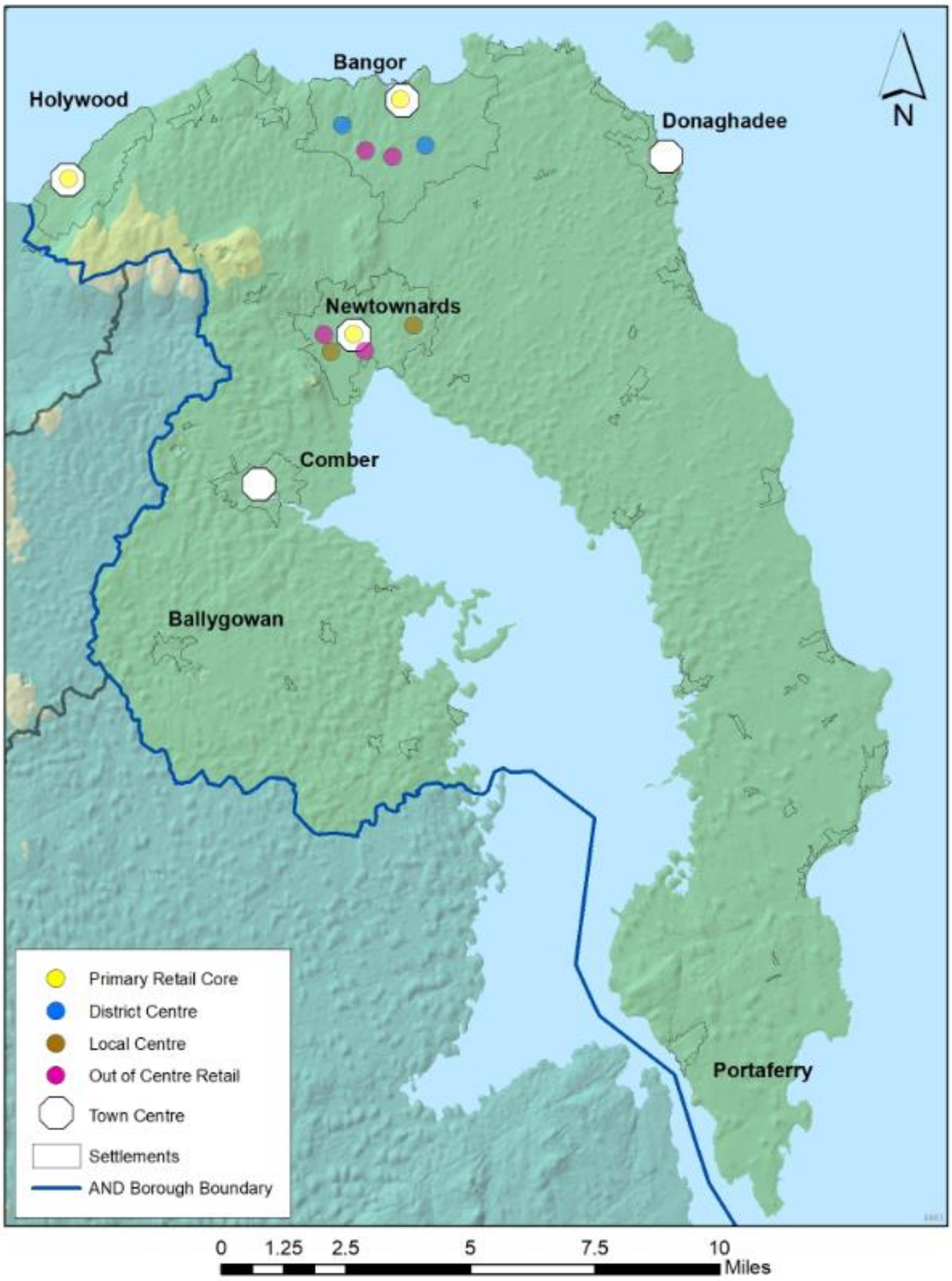
5.1 Retail provision in the Borough is distributed throughout the current hierarchy of designations including Primary Retail Cores and Town, District and Local Centres. Retailing is also present at a number of ‘Out of Centre’ locations.

5.2 The Borough’s existing retail hierarchy currently comprises: one Primary Retail Frontage; three Primary Retail Cores; five Town Centres; two District Centres and two Local Centres.

Table 1: Existing Retail Hierarchy in Ards and North Down

Draft Belfast Metropolitan Area Plan 2015	
Plan Reference	**Description**
BR 39	Bangor Town Centre
BR 40	Primary Retail Core Bangor
BR 41	Primary Retail Frontage Bangor
BR 13/01	Bloomfield District Centre
BR 13/02	Springhill District Centre
HD 22	Holywood Town Centre
HD 23	Primary Retail Core Holywood
Ards and Down Area Plan 2015	
NS 44	Newtownards Town Centre
NS 45	Primary Retail Core Newtownards
NS 48	Stratheden Heights Local Centre, Scrabo Estate Local Centre
CR 19	Comber Town Centre
DE 22	Donaghadee Town Centre

5.3 Notable ‘Out of Centre’ retailing is located at Bloomfield, Clandeboye and Balloo Retail Parks in Bangor and at Ards Shopping Centre and Castlebawn Retail Park in Newtownards. The existing retail hierarchy for Ards and North Down is displayed in Map 1 overleaf.



Map 1: Existing Retail Hierarchy in Ards and North Down

5.4 The DOE commissioned GL Hearn Limited to carry out a Town Centres and Retailing research project to inform the preparation of the SPPS. The research was initiated in April 2013 and included health checks of both Bangor and Newtownards within the Borough. The final report was published in January 2014. This provides vacancy rates for Bangor and Newtownards for 2013 including commentary on historical vacancy rates.

5.5 The LDP team carried out survey work in each of the designated town and district centres in May and June 2017. Portaferry and Ballygowan were also surveyed as they are the largest settlements by population size within the Borough without a designated town centre (population size 2,514 and 2,957 respectively, NI Census 2011, NISRA). The survey work involved the identification and recording of: a range of uses in terms of the Use Classes Order; convenience and comparison retail provision; retail service provision; and vacancy levels. Qualitative observations were also made about environmental quality, accessibility, perception of safety, and pedestrian flows.

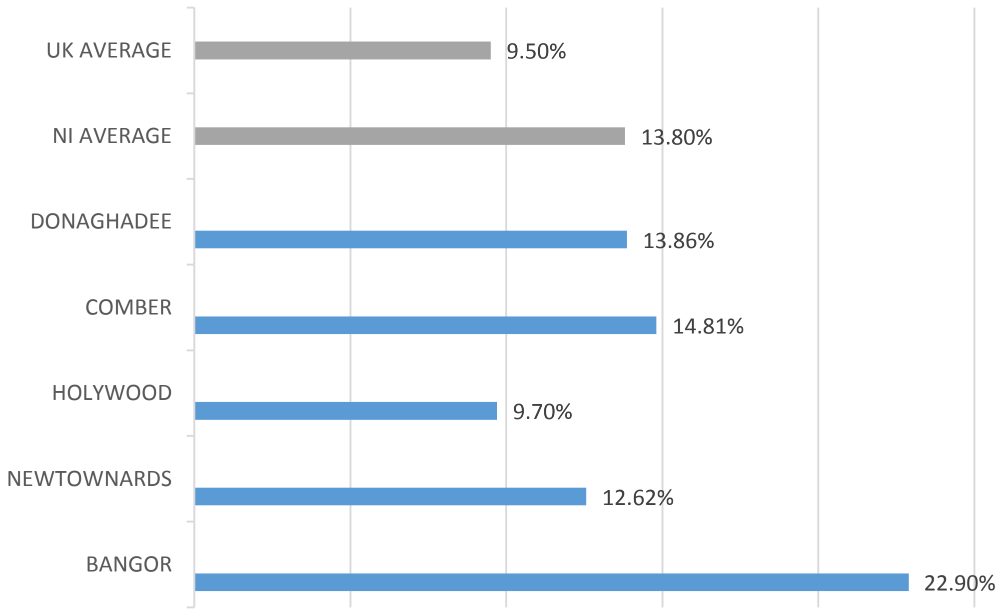
5.6 Information on vacancy rates as per the Council surveys of May 2017 and the GL Hearn surveys in 2013 are displayed in Table 2 below. The table shows an increase of +4% in the vacancy rates for Bangor and Newtownards between the GL Hearn surveys of 2013 and Council surveys of 2017.GL Hearn noted that vacancy in Bangor had increased from historical rates of 13% to 15%. GL Hearn had no historical data for Newtownards (GL Hearn 2014). It is unclear from the GL Hearn methodology whether they counted derelict units as vacant. The Council survey counted derelict units in the vacancy count. Direct comparisons should therefore be carried out with caution as the survey methods are unlikely to correlate exactly.

Table 2: Comparison of Town Centre Vacancy Levels

	Vacancy Rates in Each Town Centre (as % of total non-residential units	
Settlement	**2017 (Council survey)**	**2013 (GL Hearn survey)**
Bangor	22.9	18
Newtownards	12.62	10
Holywood	9.69	n/a
Comber	14.81	n/a
Donaghadee	13.86	n/a

5.7 Bangor has the highest percentage of vacancy and Holywood the lowest. Holywood excepting, these figures do not contrast favourably with the Northern Ireland average vacancy rate of 13.8% and the UK average vacancy rate of 9.5% (Source: Quarter Four 2016 & 2017 Outlook, Lisney) (See Fig. 1 below).

Figure 1: Town Centre Vacancy Rates within Ards and North Down Borough compared to the NI and UK averages



5.8 As stated above, the Council surveys looked at the types of non-residential land uses within each of the town centres. Table 3 below displays the diversity of uses which were found. Newtownards has the highest percentage of Class A1 shops in the Borough at 53%. Holywood has the highest percentage of both Class A2 offices and B1 offices. Bangor does not have a strong showing in any particular use class which is partly reflective of a diverse offering and may also be due to the high vacancy rate. Comber and Donaghadee both have over 40% of Class A1 shops and over 20% of sui generis leisure and hospitality services. However these may be skewed by the relatively low number overall of non-residential units in these centres.

Table 3: Non-Residential Land Uses within Town Centres in Ards and North Down (Source: Ards and North Down Borough Council Surveys May 2017)

		SETTLEMENT				
		Bangor	**Newtownards**	**Holywood**	**Comber**	**Donaghadee**
USE CLASS (AS % OF TOTAL NON-RESIDENTIAL UNITS	**A1: Shops**	37%	53%	33%	41%	44%
	A2: Financial, professional & other services	10%	11%	17%	10%	4%
	B1: Other Offices	4%	5%	6%	3%	1%
	D1: Community & Cultural Uses	8%	9%	14%	7%	10%
	D2: Assembly & Leisure	0.33%	0.28%	0%	0%	0%
	Leisure and hospitality services[5]	16%	14%	16%	20%	22%
	Other Sui Generis uses	2%	5%	4%	4%	6%

[5] This includes sui generis hospitality and commercial leisure type uses (i.e. those that do not fall within any particular use class) such as cafes, restaurants, bars, hotels, leisure centres, gaming and amusement arcades.

Bangor Town Centre

5.9 Bangor Town Centre is extensive in nature comprising Main Street, High Street, Queen's Parade, Gray's Hill, Bridge Street, Quay Street, and Abbey Street and part of Bangor Marina (see Figure A1 in Appendix).

5.10 Bangor enjoys an attractive seaside location however it is constrained by the road network and car parking which divorce the town centre from the seafront. The town centre is diverse in character with modern commercial buildings sitting cheek by jowl with Victorian architecture and there are views from the main shopping streets (Main Street and High Street) towards the coast and McKee Clock. Much of the town centre lies within Bangor Central Area of Townscape Character. Recent works to the Public Realm including improved paving, lights, seating, and planting have been successful in improving the appearance of the Town Centre. However, away from the main shopping streets there are examples of cluttered signage and notable areas with a lack of active frontage.

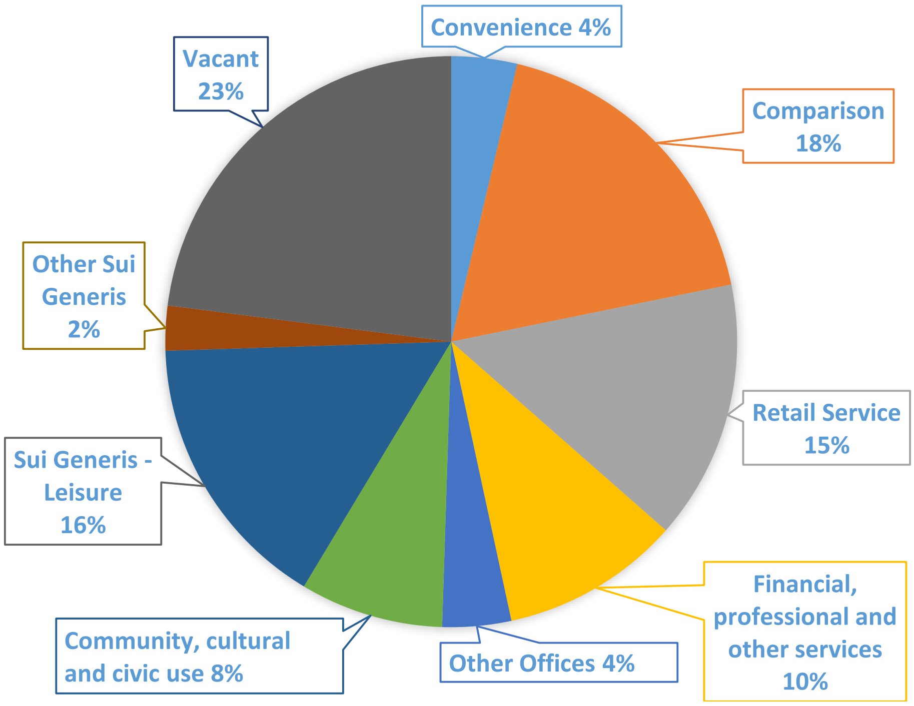
Figure 2: Main Street Bangor

(Source: Ards and North Down Borough Council)

5.11 Bangor Town Centre is well served by transport infrastructure with a bus and train station. Roads within the centre were observed to be busy with high uptake of both on-street car parking and the car parks along the seafront.

5.12 In terms of its function, Bangor Town centre exhibits reasonable diversity with a range of shopping and other town centre uses.

Figure 3: Non-residential uses within Bangor Town Centre



(Source: Ards and North Down Borough Council surveys May 2017)

5.13 Comparison retailing is currently concentrated within Main Street and Bridge Street and comprises 18% of all non-residential units recorded within the Town Centre. This has fallen from the 21% recorded by GL Hearn in 2013. National Multiples are limited to Menarys, Tempest, TK Maxx, Boots and Easons. At the time of surveying Dunnes was also present in the Flagship Centre however this has now closed.

5.14 Convenience retailing comprises 4% of all non-residential units within the Town Centre which has fallen from 5% recorded by the GL Hearn Survey of 2013 and is provided by a variety of small independent traders along with the Asda supermarket located on Main Street. A weekly market takes place on Wednesdays in a portion of the Asda car park. This was observed to be well attended with many consumers making purchases.

5.15 Retail services such as post offices, hairdressing, opticians, dry cleaners, repair shops etc. account for 15% of all non-residential units within the Town Centre.

5.16 'Leisure services' (which includes sui generis uses such as cafes, restaurants, bars, hotels, leisure centres, gaming and amusement arcades) account for 16% of all non-residential uses within the town centre. These commercial leisure and hospitality type uses together with those classified as "community, cultural and civic" account for 24% of total town centre uses. This is notable as it exceeds the traditional retail type uses which comprise 22%.

5.17 Financial, professional and other service uses falling within Class A2 of the Use Classes Order comprise some 10% of the total non-residential units within the town centre. Other office uses comprise a further 4% giving a total of 14% for office based uses within Bangor Town Centre.

5.18 Bangor Town Centre has the highest vacancy rate within the Borough at 23% of all non-residential units (Council survey May 2017). GL Hearn recorded a vacancy rate of 18% in 2013. Although direct comparisons between the two surveys are cautioned against due to the potential of different surveying methods, the trend of increasing vacancies appears clear. At the time of surveying in May 2017, the vacancy rate for the Flagship Centre was 74%. This rose to 77% following the subsequent closure of Dunnes Stores. At the time of writing the Flagship Centre is now closed. Planning permission was granted for the change of use of one of the existing retail units to a gymnasium (LA06/2017/0234/F) on 5 September 2017.

Figure 4: Flagship Centre interior

(Source: Ards and North Down Borough Council)

5.19 A pocket of vacancy and dereliction is concentrated around the Queen's Parade site which is now largely within the ownership of the Department for Communities (DfC). That Department, together with the Council, is in the process of appointing a preferred developer for the mixed-use regeneration scheme which incorporates retail, entertainment, leisure and hospitality. A revised planning application will be required. Prior to submission, the developer will be required to carry out pre-application community consultation to engage the local community in commenting on the proposal.

5.20 Project 24 is a “meanwhile” project located at Queen’s Parade. Project 24 comprises six artist pods made from customised shipping containers, with changing resident artists. The surrounding area is landscaped and is used as an event space (‘The Hub’), seating and community garden. This temporary project has transformed a derelict space into a vibrant and creative shared space. “Meanwhile” projects not only improve the appearance of an area, but also create footfall and vitality, and serve start-up businesses or those in creative industries, such as the artists in Project 24.

Figure 5: Project 24 at Queen’s Parade

(Source: Ards and North Down Borough Council)

5.21 Post-public realm surveying and analysis was carried out in February 2017 by FN Research Ltd. for the Council. They surveyed visitors to the town centre in relation to the purpose of their visit.

5.22 The purpose of most (62%) respondents' visit to Bangor town centre was shopping or to buy something. This appears somewhat at odds with the recorded decline in retail provision within the town. The next most common purpose was for eating or drinking (15%). Work or school in the area was next at 10%. Using financial services, and health and beauty / hairdressing recorded 8% and 4% respectively. Numbers using the town for entertainment or leisure purposes was recorded at 4%. Other purposes such as visiting someone, church, dancing, visiting an art exhibition and unspecified, were recorded at 5%.

5.23 There is a concentration of housing in peripheral areas of the town centre – much of which is designated as Protected Housing Areas in draft BMAP 2015. Housing within town centres is commonly accepted to be beneficial not just for the provision of valuable housing stock, but also for its contribution to vitality (as centres tend to remain populated outside business hours) and for the increased economic activity which a resident population may provide.

5.24 It is considered that scope for expansion of the Town Centre boundary may be physically constrained by the concentration of housing in outlying areas, the fine grain urban fabric and street pattern. The Town Centre is already fairly extensive and the high vacancy level suggests that the existing boundary can accommodate future town centre uses.

Bloomfield District Centre, Bangor

5.25 Bloomfield District Centre comprises an enclosed shopping mall anchored by Marks and Spencer and a Tesco supermarket. These are complemented by 22 multiple retailers including, Next, H&M, and River Island. The Centre also contains a number of fast food restaurants with a food court located within the shopping mall. There were five vacant units in the mall at the time of surveying. Free car parking is provided at the centre and this was observed to be busy at the time of the survey in May 2017. A retail park is immediately adjacent to the mall but outside the boundary of the District Centre.

Springhill District Centre, Bangor

5.25 Springhill District Centre located on the Belfast Road is anchored by a Tesco Extra superstore with a small range of other Multiple Retailers including Peacocks, New Look and Sports Direct. The Centre also includes a number of cafés, a health centre, dentists and pharmacy. There were four vacant units at the time of surveying (Council Survey May 2017).

Out of Centre Retailing

5.26 Bloomfield Retail Park is located immediately adjacent to the mall but outside the boundary of the District Centre. This contains a number of comparison shops comprised of multiples such as DW Sports, Laura Ashley, Pets at Home and Harry Corry. There is also a Tesco filling station located within the retail park and two vacant restaurant units.

5.27 Clandeboye Retail Park is located on West Circular Road in Bangor. It is primarily a retail warehouse park selling primarily bulky goods with national multiples such as Carpet Right, Dreams, Halfords, Harveys and Currys/PC World. Two bargain retailers Poundstretchers and Home Bargains are also located here as is a filling station and several hot food bars. Additional bulky goods retailers are located on the opposite side of West Circular Road.

5.28 Balloo Retail Park is located on South Circular Road in Bangor. It contains a Homebase store and a large Sainsburys convenience store, incorporating an Argos store. There are a number of retailers located to both the east and west of these units including several comparison retailers.

Newtownards Town Centre

5.29 Newtownards has a fairly compact Town Centre bound by Regent Street and Frances Street to the north and Court Street to the south (see Figure A2 in Appendix). The western limit is formed by William Street and the eastern limit extends to Market Street and beyond. Conway Square provides a centrally located pedestrianised public space which is home to a weekly market and also provides a space for community and cultural events.

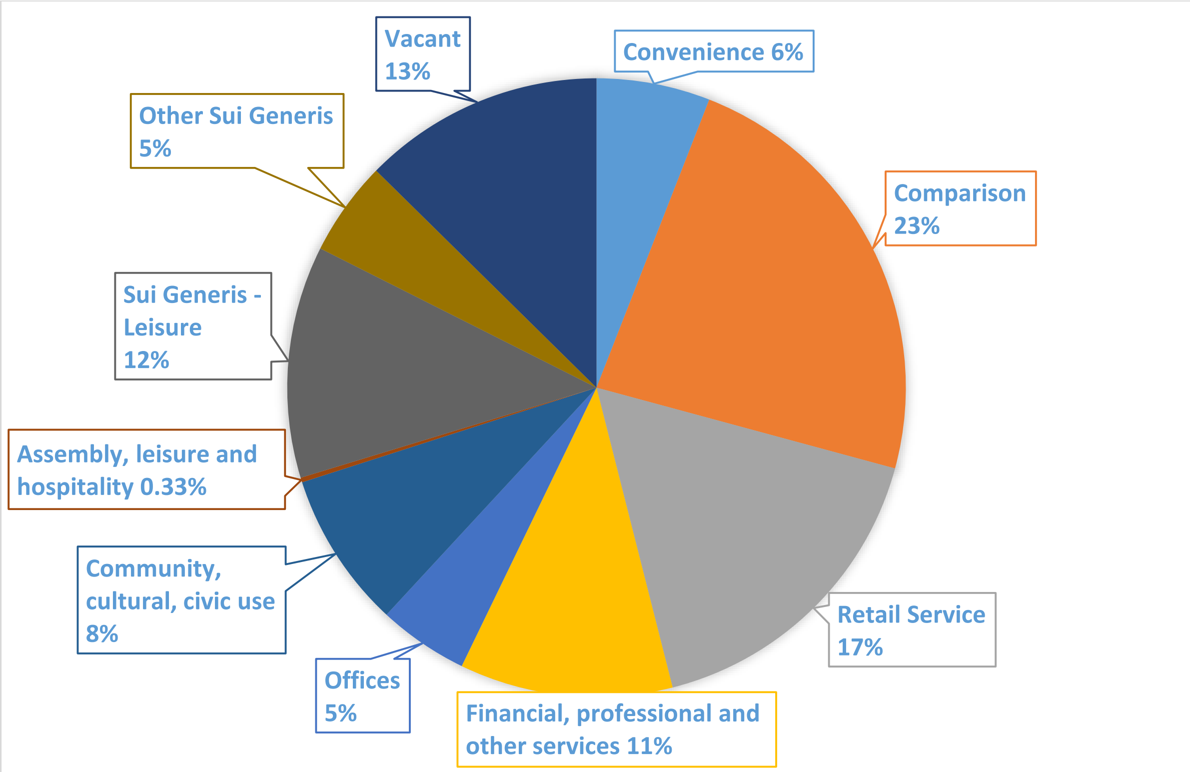
Figure 6: Conway Square Newtownards

5.30 Newtownards has some fine architecture and streetscapes but tends to be dominated by its road network which makes it accessible to vehicles but detracts from its character. Recent works to the public realm including paving, lights, seating and planting have succeeding in improving the appearance of the centre. Dereliction in Court Street and South Street in particular negatively impacts the streetscape. The 'Precinct' in South Street is a noteworthy exception and contributes positively to the area. In certain areas a proliferation of road signage detracts from the character of the area – particularly around the Old Cross.

Figure 7: Dereliction in South Street

5.31 Newtownards Town Centre was observed to be busy with both pedestrians and motorists at the time of surveying. Both on-street and off-street parking is well used with spaces available only in the peripheral car parks. A bus station is reasonably centrally located on East Street and provides local bus services as well as transport links to and from Belfast and the Ards Peninsula.

Figure 8: Non-residential uses within Newtownards Town Centre



(Source Ards and North Down Borough Council Surveys May 2017)

5.32 Newtownards has an established reputation as a retail destination. Conway Square and High Street are the traditional focus for retailing in the Town Centre and retain the highest concentration of comparison retailing which accounts for 23% of all non-residential units within the centre (see Fig. 12 above). The majority of these units are independent stores including the local department store Wardens. Some multiple retailers are present including Menarys, Gerry Weber, The Edinburgh Woollen Mill, SD Kells, Boots, Gordons, and Argento.

Figure 9: High Street Newtownards

(Source: Ards and North Down Borough Council)

5.33 Convenience retailing comprises 6% of all non-residential units in the centre. There is no large anchor tenant within the town centre but there is a good variety of small, local independent traders including butchers, bakeries, and greengrocers.

5.34 Retail services comprise some 17% of the total non-residential uses within the Town Centre. This is supplemented by “leisure services” (which includes sui generis uses such as cafes, restaurants, bars, hotels, leisure centres, gaming and amusement arcades) accounting for 12%.

5.35 Financial, professional and other service uses falling within Class A2 of the Use Classes Order comprise some 11% of the total non-residential units within the town centre. Other office uses comprise a further 5% giving a total of 16% for office based uses within Newtownards Town Centre.

5.36 The Town Centre has a wide range of other community, cultural and civic uses including Ards Arts Centre, a library, a tourist information centre, places of worship, and a bus station.

5.37 Vacancy rates over the whole of the town centre are 13% of all non-residential units recorded by Council staff. GL Hearn estimated a vacancy rate of 10% in 2013. This indicates an increase in vacancies of +3%. The majority of vacancies appear to be concentrated in peripheral areas of the town centre as opposed to the main shopping streets which have fewer instances of vacancy. Therefore the overall impression of the town centre is not negatively impacted by the increase in vacancies.

5.38 Post-public realm surveying was carried out by Council staff with post-works analysis carried out and provided to Council by the Department for Communities Analytical Services Unit (ASU) in May 2017. This included a survey to record the purpose of those visiting the town centre with 43% of those surveyed were visiting the town centre to shop whereas a total of 53% were present for other reasons including using services, eating or drinking, work/school, health and beauty.

Stratheden Heights Local Centre

5.39 This Local Centre comprises a Spar convenience store with post office, a butcher, Boots chemists, Winemark and a hot food bar.

Scrabo Estate Local Centre

5.40 This Local Centre comprised a number of vacant retail and retail service units. These units have now been demolished as part of a social housing development for 9 dwellings (LA06/2016/0510/F).

Out of Centre Retailing

5.41 Ards Shopping Centre is recognised as a de facto District Centre by the Planning Appeals Commission in its report of its hearing into an Article 31 planning application for the redevelopment of the former Scrabo High School site (X/2010/0819).

5.42 Ards Shopping Centre comprises an enclosed shopping mall anchored by an Asda supermarket. Convenience retailing is also provided by an Iceland store. In terms of comparison retailing the majority of units within the mall are occupied by multiple retailers including TK Maxx, Next, River Island, Primark, Argento, Clarks, Boots and JD Sports. A number of retail service providers are also located within the Centre including travel agents and a Post Office within Asda. There are a number of cafes and fast food restaurants within the Centre. Four vacant units were recorded at the time of surveying (Council survey May 2017). Free car parking is available at the shopping centre. On the opposite side of Brooklands Road to the main shopping mall is an overflow car park accessed via an underpass. This section hosts an Asda filling station, Movieland multiplex cinema and two fast food restaurants.

5.43 Planning permission was granted in 2012 for a two-storey extension to the shopping centre to allow for an additional 15,190m^2 gross comparison retail floorspace including four restaurants and five kiosks with a multi-storey car park (X/2004/1800/F). The owner is presently commencing this development.

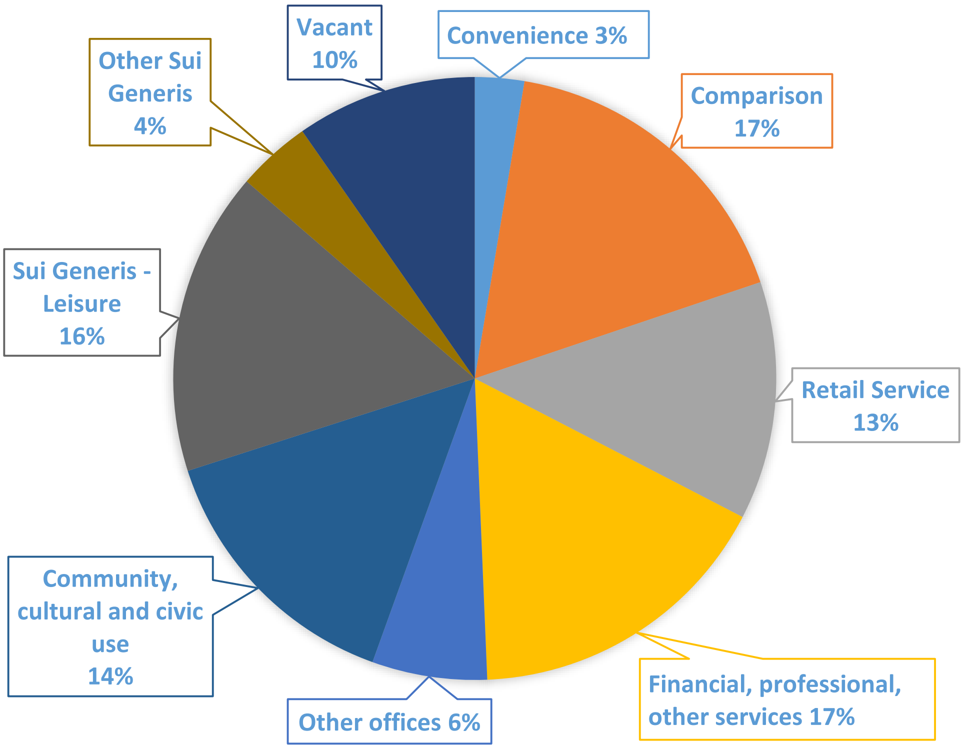
5.44 Castlebawn Retail Park is located off the A20 Castlebawn Road and is dominated by a large Tesco Extra superstore and associated petrol filling station. There are also several comparison retailers present comprised of Matalan, Home Bargains and Bargain Buys. A fast food restaurant is also located within the retail park. Castlebawn Retail Park is well served by an extensive area of free parking. The planning history on the site is complex. The DOE accepted in January 2016 in its consideration of application X/2011/0189/O (for the proposed re-development of the site to provide a foodstore with associated car-parking and landscaping) that the site has extant permission for some 2031sqm of non-bulky comparison floorspace and 1350sqm of convenience floorspace which has not been implemented. There has also been the recent approval of an application for a retail unit selling bulky goods located immediately adjacent to the existing Tesco Extra store (X/2011/0393/F).

Holywood Town Centre

5.45 The Town Centre follows a somewhat linear pattern along High Street and its surrounding streets. It is bound to the north west by the Holywood By-pass and to the south east by Church View. The Primary Retail Core is focused on High Street as the commercial heart of the town. Part of the town centre is within the designated Conservation Area in recognition of the quality of the predominantly Victorian architecture and townscape. Recent Public Realm works have improved the appearance of public space within the town centre. Further Public Realm works are underway at Redburn Square.

Figure 10: High Street, Holywood

Figure 11: Non-residential uses within Holywood Town Centre



(Source: Ards and North Down Borough Council surveys May 2017)

5.46 Comparison retailing accounts for 17% of non-residential units in Holywood town centre. This is largely comprised of local independent traders with few multiples present (e.g. Boots and The Original Factory Shop).

5.47 Convenience retailing comprises 3% of all non-residential units in the centre. There is no large anchor tenant within the town centre but there are smaller multiples such as a Tesco Express and Centra. There are several small local independent traders including butchers and bakeries.

5.48 Retail services comprise some 13% of the total non-residential uses within the town centre.

5.49 “Leisure services” (which includes sui generis uses such as cafes, restaurants, bars, hotels, leisure centres, gaming and amusement arcades) account for 16% which is comparable with the comparison retail offer in the town.

5.50 Financial, professional and other service uses falling within Class A2 of the Use Classes Order comprise some 17% of the total non-residential units within the town centre. Other B1 office uses comprise a further 6% giving a total of 23% for office based uses within Holywood Town Centre. This exceeds the offering in Bangor and Newtownards at 14% and 16% respectively.

5.51 Holywood Town Centre appears to be performing well as its vacancy rate is 10%, below the Northern Ireland average of 13.8% and only slightly above the UK average of 9.5%. There is no comparable data from previous years.

5.52 Post public realm surveying and analysis was carried out in February 2017 by FN Research Ltd. for the Council. They surveyed visitors to the town centre in relation to the purpose of their visit.

5.53 The purpose of most (48%) respondents’ visit to Holywood town centre was shopping or to buy something. The next most common purpose was for eating or drinking (27%). The total footfall counts are not available in relation to Holywood.

Comber Town Centre

5.54 Comber has a relatively compact town centre focussed around The Square with the primary retail offering on the neighbouring streets. The built environment has some fine examples of historic architecture and traditional narrow streetscapes. However, this is impacted upon by vacancies and dereliction in certain areas. Traffic and congestion coupled with narrow streets result in issues around accessibility and movement along some streets. Recent public realm improvements have had a positive visual impact on the area.

Figure 12: The Square, Comber

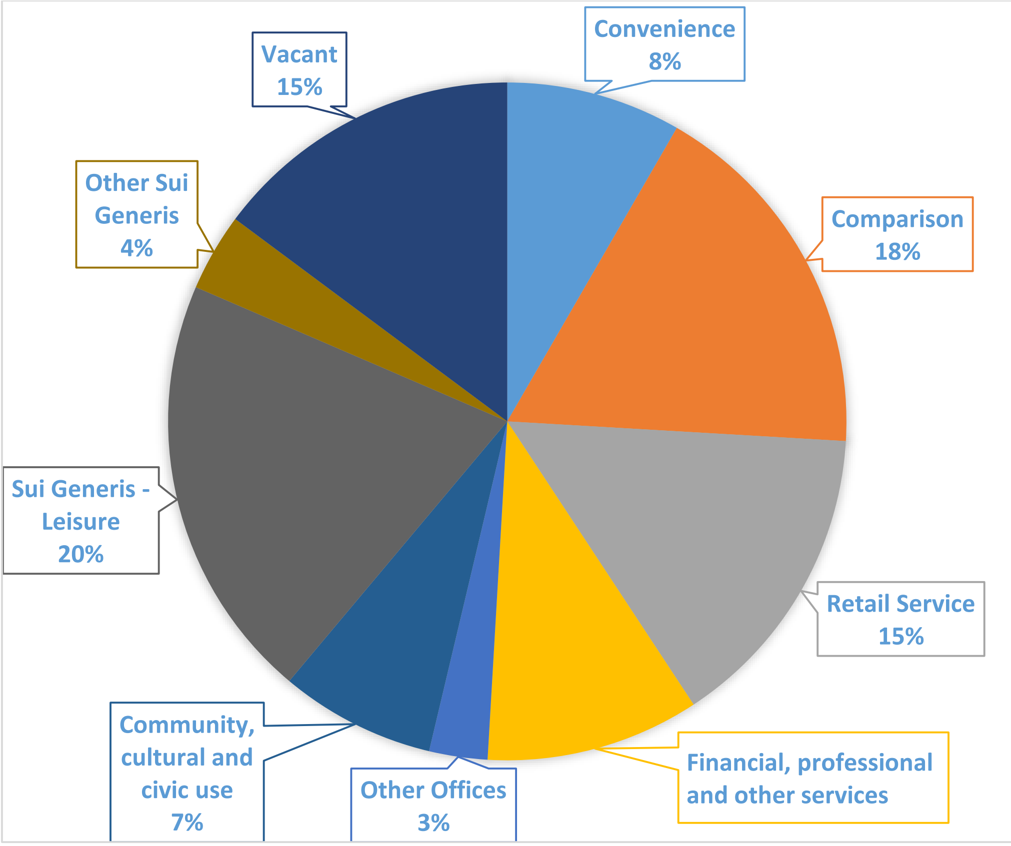
(Source: Ards and North Down Borough Council)

Figure 13: The Square, Comber

(Source: Ards and North Down Borough Council)

5.55 Comber has a modest retail offering as befits a town of its size. Leisure uses such as cafes, restaurants, bars and hot food bars comprise the largest proportion of non-residential uses within the centre at 20%. This is followed by comparison retailing at 18% - this consists entirely of small local independent traders. Convenience retailing comprises 8% with a Tesco Express and larger Supervalu both present alongside independent butchers and bakeries. A farmers' market takes place on a monthly basis adjacent to the Square.

Figure 14: Non-residential uses within Comber Town Centre



(Source: Ards and North Down Borough Council Survey May 2017)

5.56 Vacancy rates are the second highest in the Borough at 15% - this is particularly noticeable at peripheral areas of the town centre at Castle Street and Bridge Street. Combined with dereliction, this detracts from the character and appearance of the area.

5.57 Post-public realm surveying was carried out by Council staff with post-works analysis carried out and provided to Council in a report by the Department for Communities' Analytical Services Unit (ASU) in May 2017. This included a survey to record the purpose of those visiting the town centre which indiacted that those visiting the centre for a specific purpose are equally split between those shopping and those who visit for one of the other reasons (45% and 50% respectively).

Donaghadee Town Centre

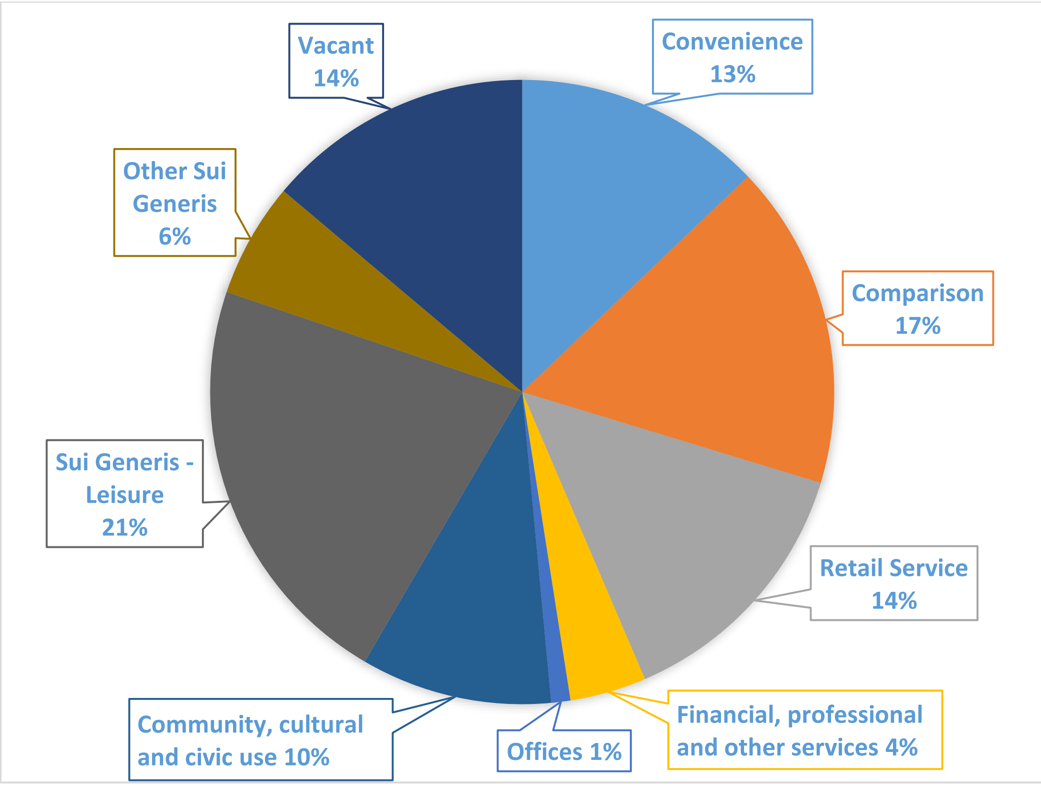
5.58 Donaghadee Town Centre enjoys an attractive seaside location and benefits from its high quality natural and built heritage assets. The majority of the town centre is within a Conservation Area. The built environment consists of some fine examples of well-preserved high quality architecture including listed buildings, the listed harbour and historic monuments. The townscape has been further improved by a successful Public Realm scheme which introduced new paving, street furniture, lighting and planting (see Fig. 22 overleaf). Further successes are attributable to uptake of the Townscape Heritage Initiative[6] to improve shopfronts. There are some notable instances of vacancy and dereliction within the town centre although some of these are intended for redevelopment pending planning permission. Retailing is primarily based around High Street, New Street, Bridge Street and The Parade.

Figure 15: The Promenade, Donaghadee

[6] The Townscape Heritage Initiative was funded by Heritage Lottery Fund and administered by the Council to regenerate historic buildings and reverse decline in historic townscapes (https://www.hlf.org.uk/looking-funding/our-grant-programmes/townscape-heritage)

5.59 Donaghadee exhibits a modest offering of retail and other town centre uses befitting its size. It has the highest percentage of convenience retailing in the Borough at 13% - the majority of which is local independent traders. It also has the highest percentage of leisure uses including cafes, restaurants and bars. Vacancy rates are 14% - just above the Northern Ireland average (see Figure 23 below).

Figure 16: Non-residential uses in Donaghadee Town Centre



(Source: Ards and North Down Borough Council surveys May 2017)

5.60 Post-public realm surveying was carried out by Council staff with post-works analysis carried out and provided to Council in a report by the Department for Communities' Analytical Services Unit (ASU) in May 2017. This included a survey to record the purpose of those visiting the town centre. The percentage of visitors in Donaghadee for entertainment or leisure purposes is just below those visiting for shopping. At 29% this is significantly higher than that recorded for other centres.

Portaferry

5.61 Portaferry is one of the largest villages within the Borough by population size at 2,514 (NI Census 2011, NISRA) and does not have a designated town centre. Non-residential uses are concentrated around The Square and the surrounding streets High Street, Ferry Street, Castle Street, The Strand, Shore Road and, to a lesser extent, Church Street.

Figure 17: Portaferry

5.62 The village enjoys an enviable location on the shores of Strangford Lough. Much of the central area is within a Conservation Area with many listed buildings and fine architecture contributing to the character of the settlement. The village is home to Northern Ireland's main aquarium "Exploris" and contains a hotel as well as a range of shops, cafes, pubs and hot food bars on the main streets. The retail offering is mostly convenience. The village also contains a Visitor Information Centre, several art galleries, churches and a marina. There is a regular ferry service operating to Strangford from

Portaferry. The Portaferry Gala festival is a popular event held in July. There are some notable instances of vacancy and dereliction on The Square, however some units have planning permission for redevelopment (X/2014/0297/F).

Ballygowan

5.63 Ballygowan is the largest village in the Borough in terms of population size at 2,957 (NI Census 2011, NISRA) - mainly due to its role as a commuter village. It does not have a designated town centre. There is a concentration of non-residential uses at the centre of the village centred on the convergence of the Saintfield Road, Comber Road and Belfast Road. The majority of these units are convenience retail and retail service. In terms of comparison retail there is a chemists, hardware shop and vehicle sales. A post office is located within a large filling station. There are also two A2 offices, several hot food bars, cafes and pubs and a community centre.

Key Findings

6.1 The evidence base outlined above shows that each of the Borough's town centres is locally distinctive in terms of its existing offering and performance and its potential. To this end, ongoing work in relation to town branding will help to establish the unique draw of each location. This also suggests that a tailored, town specific approach to policy concerning Town Centres and Retailing may be warranted.

6.2 The breakdown of non-residential uses within the Borough's town centres clearly demonstrates the diversity of uses and an overall trend away from traditional high street retailing. Shopping and visits to town centres are increasingly becoming a leisure activity. This suggests that town centres need to offer an experience above and beyond the average shopping trip that might otherwise be carried out elsewhere or online. This requires town centres which are vibrant and diverse in their offering to make them attractive to a diverse group of people of all ages. These uses are complementary in nature and increase the likelihood of linked trips and increased trade for footfall dependent businesses.

6.3 Increasing vacancy rates in all but one of the town centres suggest that a more flexible and creative response is required in response to the issues facing town centres today. Of particular note is the ongoing vacancy levels within the Flagship Centre – this issue warrants a tailored response. 'Meanwhile' uses such as that at Project 24 at Queens Parade in Bangor fulfil a useful function in that they provide a temporary use for a space until the time that space can be brought back into commercial use. They serve to improve the appearance of an area and increase footfall and vitality in a centre. They often serve start-up businesses or those in creative industries which then go on to occupy permanent premises in a town centre.

6.4 Festivals such as Open House or Aspects Literary Festival in Bangor, Comber Earlies Food Festival and other seasonal events throughout the borough intensify local cultural experience. Cultural vitality is increasingly as important as business vitality in terms of the town centre experience. Places with vibrant creative and cultural communities help attract and retain talented people and companies across the whole local economy. Culture and creativity can play a significant role in place-making and the retention and enhancement of useable public shared space in town centres is essential to support this.

6.5 The seaside town of Folkestone in the south east of England has experienced success in an arts and culture led approach to regeneration. The Creative Foundation, an independent arts charity, was set up in 2002 to regenerate the town through the arts, creative industries and education. An ambitious joinedup approach combines flagship projects like Folkestone Triennial (an internationally acclaimed public art exhibition), with other events and festivals and the establishment of the Creative Quarter where derelict buildings have been renovated and leased to artists and others working in creative industries. Creative Foundation tenants account for an estimated 300 jobs in Folkestone with a further 150 jobs created as an indirect result of its activities. Further successes include the renovation of 90 buildings, the construction of a new multi-purpose arts centre, improvements in education provision and research into the links between arts and health[7]. Similar community-oriented movements and initiatives may present unique opportunities for our town centres.

6.6 The evidence demonstrates that national multiple retailers are increasingly focusing on our District Centres as opposed to the traditional high street. This may lead to increasing demand for retail floorspace in these locations, conflicting with the ‘Town Centre First’ direction set out in the SPPS. Indeed there are very few vacancies at the out of centre facilities suggesting a good level of demand for these modern larger space units. There is also evidence to support that there are attempts being made to release existing retail parks from bulky goods restrictions where lower value occupiers such as DIY, carpets and furniture retailers are being replaced by major retailers attracted from central locations to retail parks because of lower overall rents, larger, better configured stores and convenient/free customer car parking. Evidence also suggests that there is a growing trend by national multiple retailers to achieve increasing economies of scale. This results in centralisation of services whereby larger stores serving an extensive catchment are replacing a number of smaller stores. The accommodation of these larger stores in historic town centres will require an innovative approach. Developers often seem to prefer the commercial attractiveness of sites perceived to be an easy fit.

[7] Adventures in Regeneration: Folkestone’s New Tide (Nick Ewbank, 2011) http://nickewbank.co.uk/projects/adventures-in-regeneration/

6.7 The retail sector is constantly evolving and adapting in response to consumer and lifestyle trends and other market influences – for example the growth in both personal income and disposable consumer spending, coupled with population growth. Such trends and influences have and will continue to transform traditional high street retailing and commercial leisure development. The economic downturn has had a negative effect on consumer spending; however, figures from Lisney for Northern Ireland and the UK in terms of average vacancy rates suggest that the outlook is improving (Lisney Q4 2016 & 2017 Outlook).

6.8 An ongoing national trend is the growth in 'Special Forms of Trading' i.e. retail sales not in shops and stores; including sales via the internet, mail order, TV shopping, and temporary open market stalls. An increasing number of 'high street' retailers are now offering online shopping. A number of local traders including Wardens, Excel and Jonzara have expanded into the online market. However, whilst online sales are increasing so too is 'click and collect' where consumers order online but visit the store to collect their goods. This service may help ensure that town centres will attract people and remain viable as consumers may be likely to carry out linked trips and visit other areas of the Town Centre when collecting pre-ordered purchases.

6.9 Another national trend is the rise of discount retailers such as Home Bargains and Poundworld. This is mirrored in the boom of discount convenience retailers such as Lidl.

Conclusions

7.1 The purpose of this paper has been to provide base line information on town centres and retailing across Ards and North Down. The LDP team discussed this information and sought input from Members at the Town Centres and Retailing Workshop on 19 September 2017 to inform work on the Council's preferred options in relation to defining: the hierarchy of centres and their spatial extent; which uses will be permitted; and how to provide for a diverse offer and mix of uses that reflect local circumstances.

7.2 It is important to acknowledge that there may be cross boundary implications for neighbouring Councils in terms of the catchment of designated centres – particularly where the expansion of an existing centre or the designation of a new centre is proposed.

7.3 The evidence base on this topic will be kept under review and will need to be further informed by detailed surveying and evaluation of town centre and retail designations together with updated health checks and assessment of the need for retail and other main town centre uses over the Plan period. This is likely to necessitate the commissioning of studies by external consultants to assist in preparing the sound evidence base required to underpin the Local Development Plan as per the Planning Act (Northern Ireland) 2011.

Glossary

Retailing -	land uses outlined within Class A1 (Shops) of the Planning (Use Classes) Order (Northern Ireland) 2015. This includes land uses for the retail sale of goods (other than hot food) and the provision of retail services to visiting members of the public such as post offices, hairdressers, launderettes and repair shops etc.
Convenience retailing -	the sale of essential non-durable items which are typically bought and consumed on a frequent basis e.g. food, drinks, tobacco, newspapers, magazines, cleaning materials and toiletries.
Comparison retailing -	the sale of non-convenience durable goods which are purchased more infrequently and may be considered luxury or lifestyle items. These include clothing, footwear, books, furniture, and electrical goods.
Leisure services -	for the purposes of this paper refers to sui generis uses such as cafes, restaurants, bars, hotels, leisure centres, gaming and amusement arcades.
Town centre -	refers to the area designated as a town centre in a (Local) Development Plan.
District centre -	a group of shops separate from the town centre, usually containing at least one food supermarket and non-retail service uses. The extent will be designated in a (Local) Development Plan
Local centre -	small groupings of shops of a local nature. Their location will be designated in a (Local) Development Plan.

Out of centre - a location outside a designated town centre or district centre boundary but within settlement development limits.

Class A2 - use for the provision of services which it is appropriate to provide in a shopping area, where the services are provided principally to visiting members of the public including—

(a) financial services; or

(b) professional services.

Class B1 - business use -

(a) as an office other than a use within Class A2 (Financial, professional and other services);

(b) as a call centre; or

(c) for research and development which can be carried out without detriment to amenity by reason of noise, vibration, smell, fumes, smoke, soot, ash, dust or grit.

Sui generis - 'of its own kind': in this context, refers to land uses which do not fall into any particular use class in the Planning (Use Classes) Order (Northern Ireland) 2015.

References and Useful Links

Regional Development Strategy 2035

https://www.infrastructure-ni.gov.uk/publications/regional-development-strategy-2035

Strategic Planning Policy Statement

http://www.planningni.gov.uk/index/policy/spps.htm

Ards and Down Area Plan 2015

https://www.planningni.gov.uk/index/policy/dev_plans/devplans_az/ardsdown_2015.htm

Belfast Metropolitan Area Plan 2015

https://www.planningni.gov.uk/index/policy/dev_plans/devplans_az/bmap_2015.htm

The Planning (Use Classes) Order (Northern Ireland) 2015

http://www.legislation.gov.uk/nisr/2015/40/contents/made

GL Hearn Retail Report

http://www.planningni.gov.uk/index/policy/spps/draft_spps/gl_hearn_retail_report.htm

Bangor Town Centre Masterplan

http://www.ardsandnorthdown.gov.uk/downloads/RDO-bangor_masterplan.PDF

Newtownards Town Centre Masterplan

http://www.ardsandnorthdown.gov.uk/downloads/Newtownards_Town_Centre_Masterplan.pdf

Holywood Town Centre Masterplan

http://www.ardsandnorthdown.gov.uk/downloads/rdo-holywood-masterplan.pdf

Donaghadee Town Centre Masterplan

http://www.ardsandnorthdown.gov.uk/downloads/donaghadee_masterplan.pdf

Comber Town Centre Masterplan

http://www.ardsandnorthdown.gov.uk/downloads/comber_town_centre_masterplan.pdf

Lisney Quarter Four 2016 & 2017 Outlook
https://www.lisney.com/research/publications-ni/973-northern-ireland-commercial-update-q4-2016-outlook-2017

Adventures in Regeneration: Folkestone's New Tide (Nick Ewbank, 2011)
http://nickewbank.co.uk/projects/adventures-in-regeneration/

Creative Foundation

http://www.creativefoundation.org.uk/

Appendix A

Town Centre Maps

Figure A1: Map of Bangor Town Centre

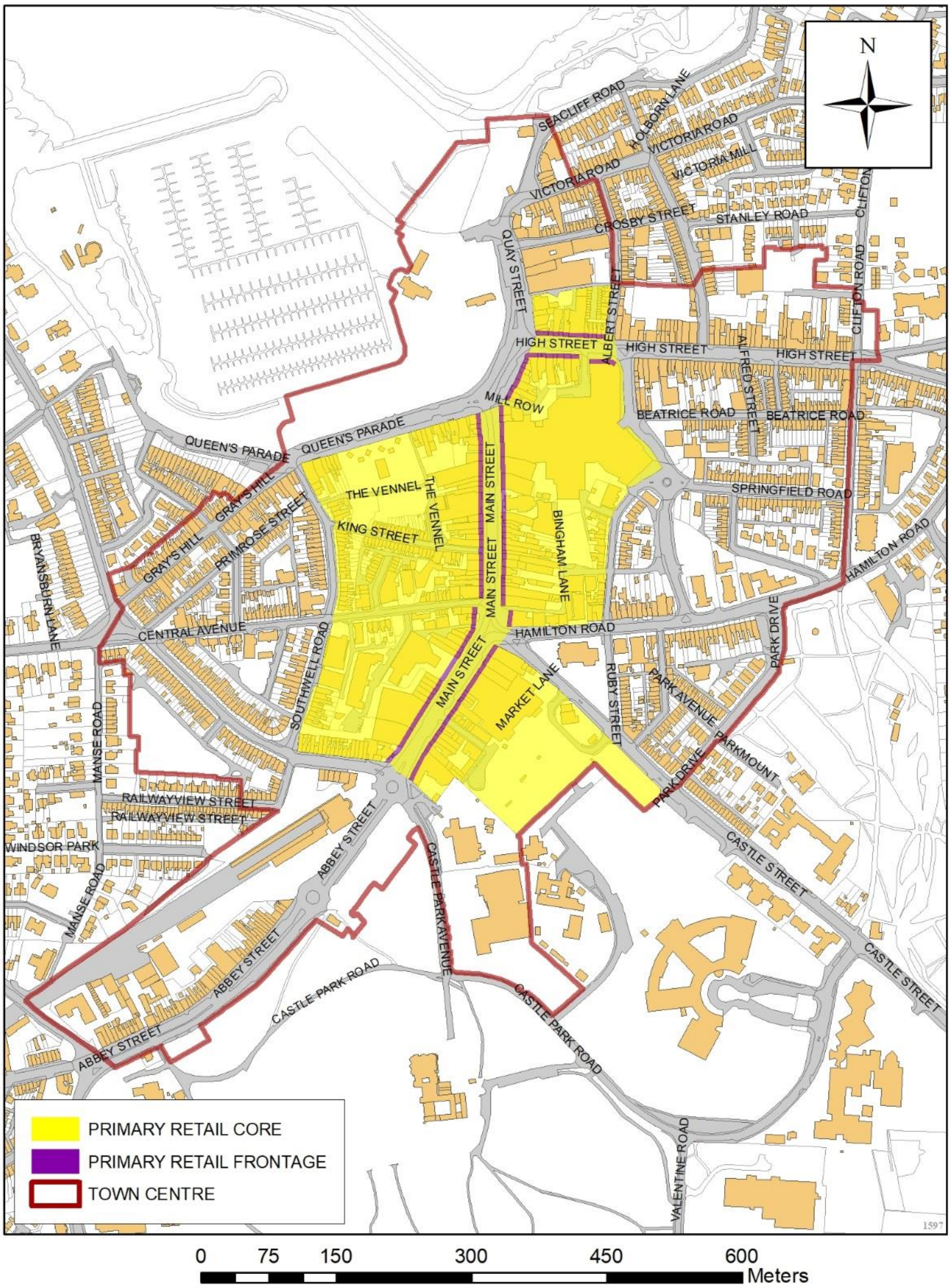


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Figure A2: Map of Newtownards Town Centre

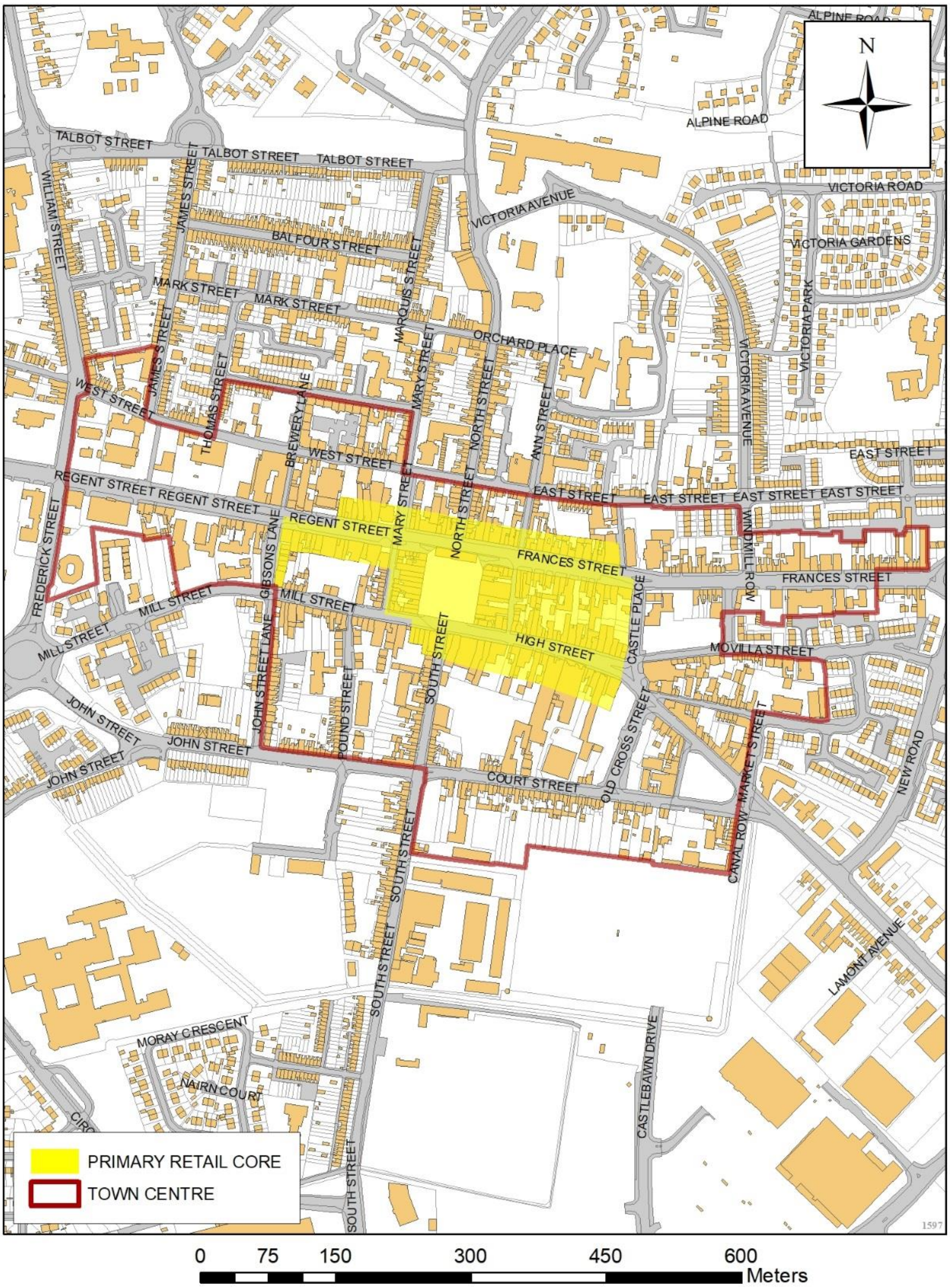


Figure A3: Map of Holywood Town Centre

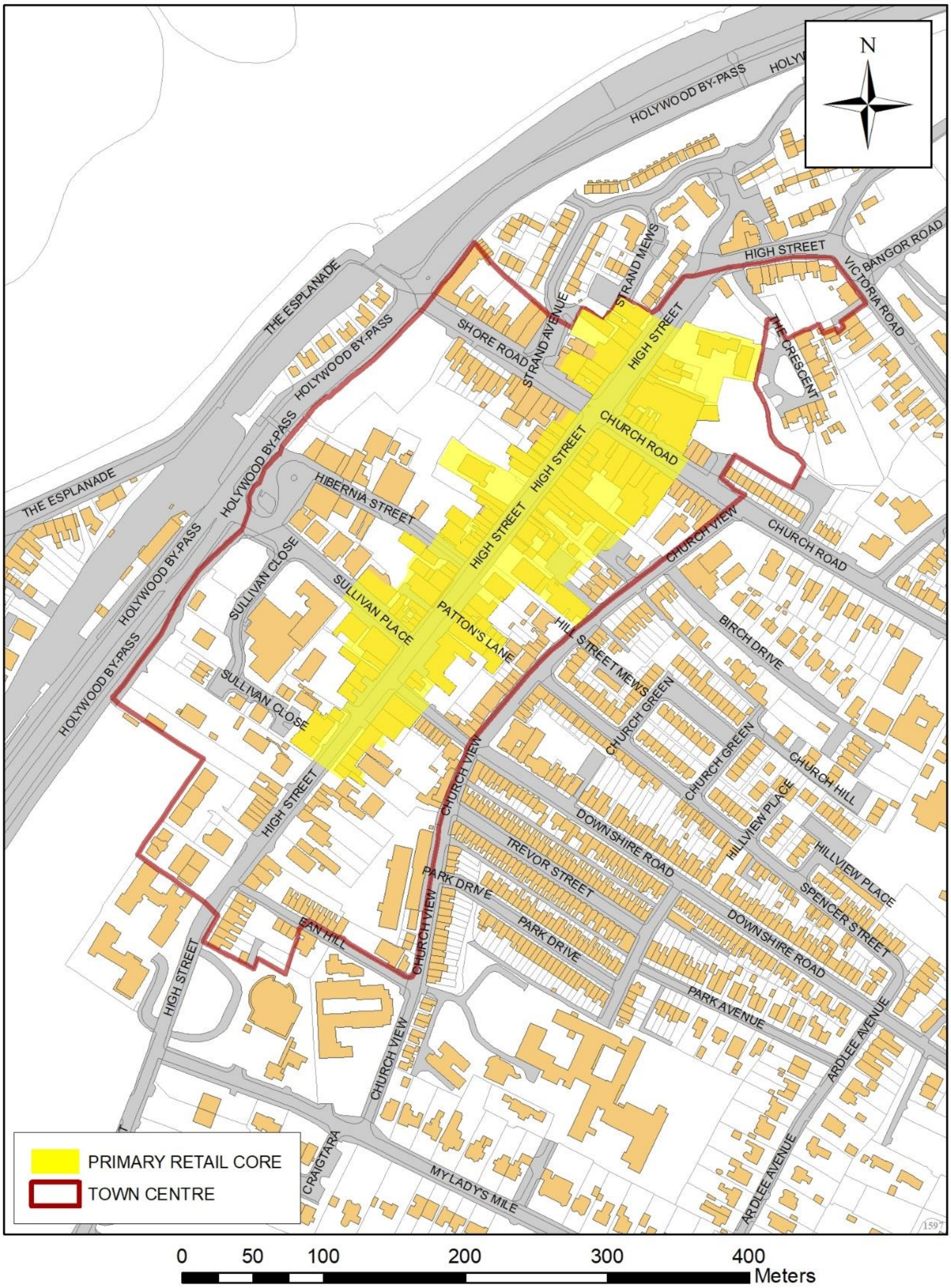


Figure A4: Map of Comber Town Centre

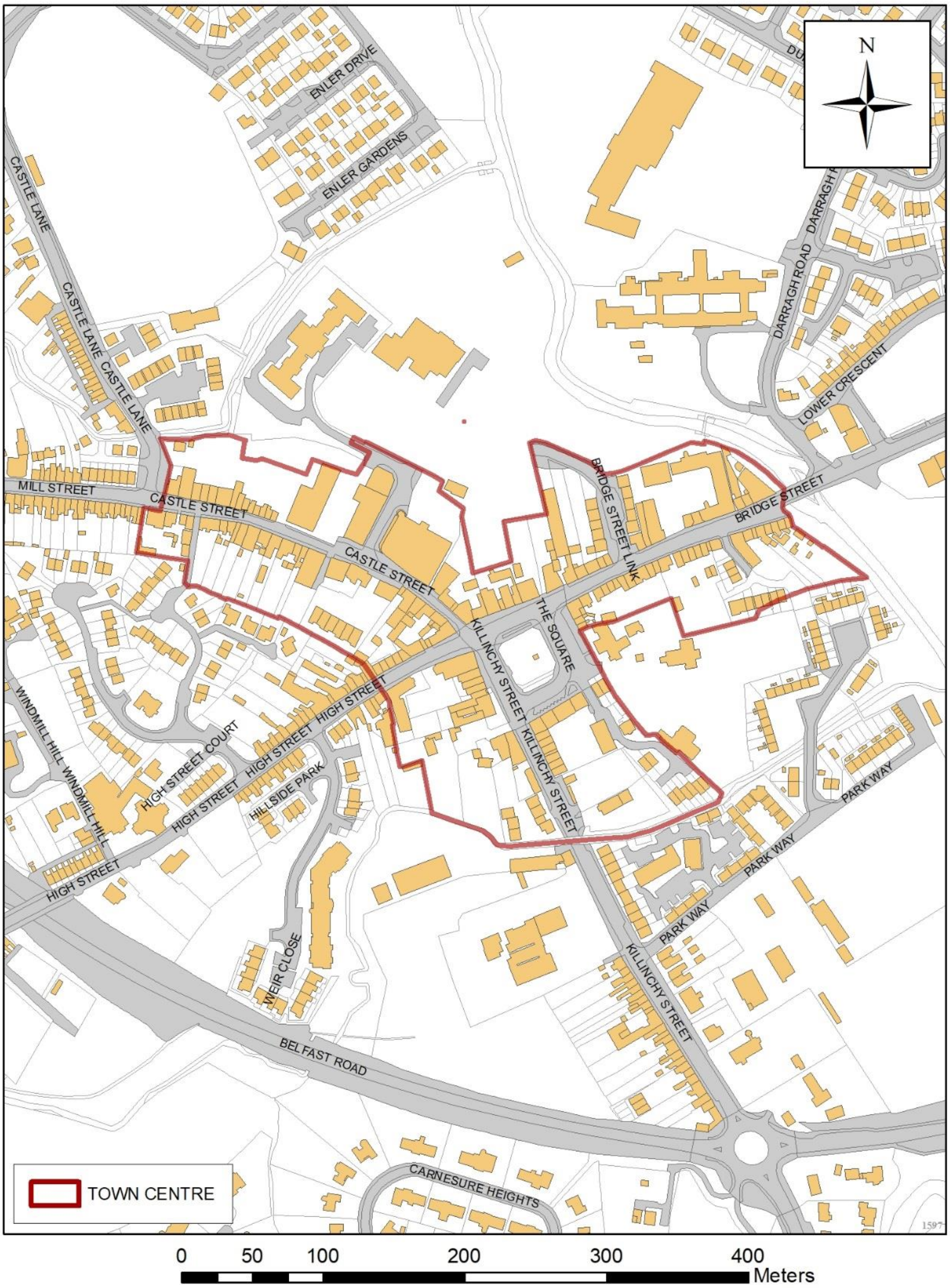
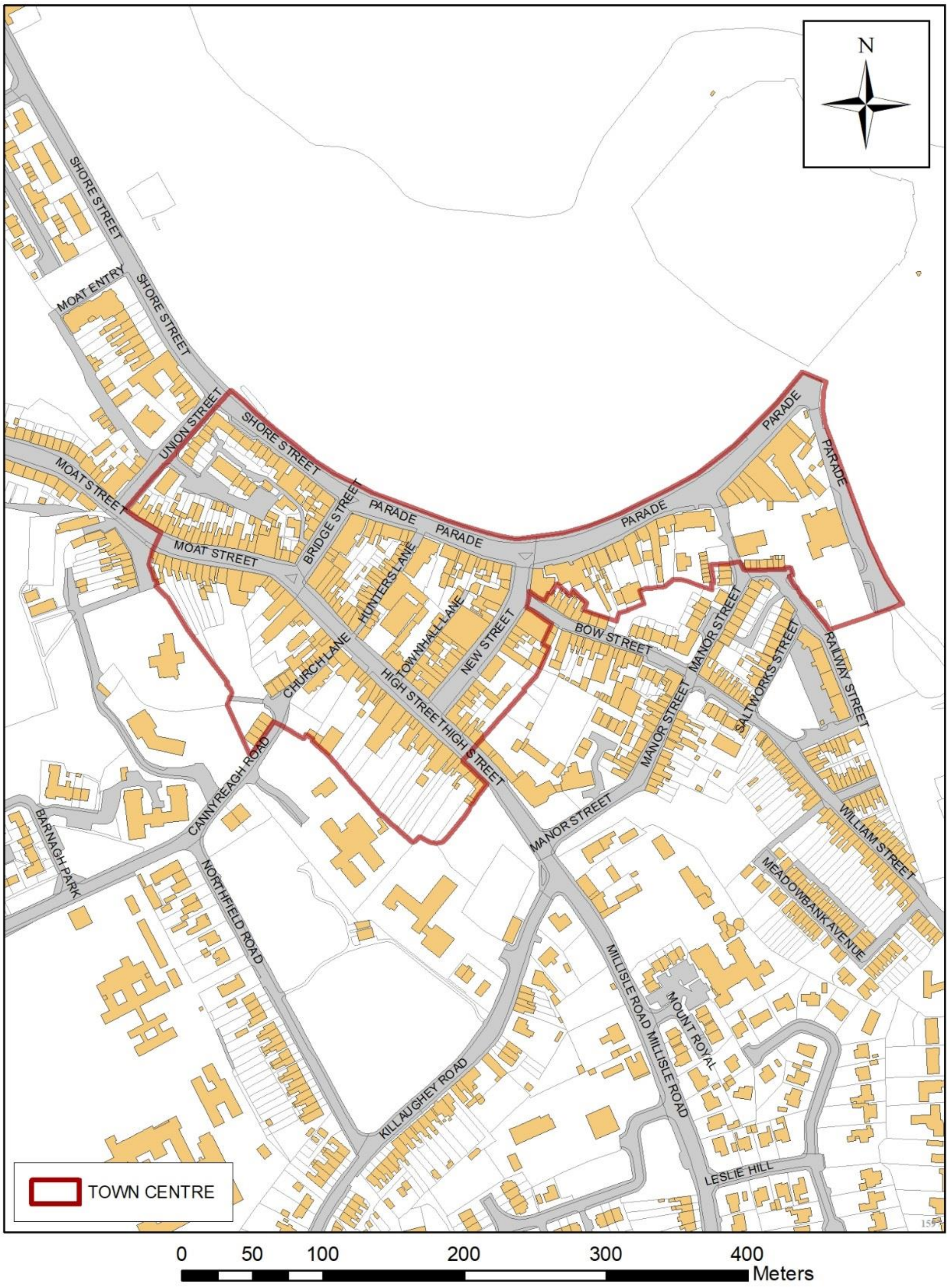


Figure A5: Map of Donaghadee Town Centre



Appendix B

Methodology for Council Surveying

<u>Town Centre Health Checks/Surveys</u>

1. **Count type of use on excel sheet and colour code map as indicated in key.**

    a. **Convenience**
    b. **Comparison**
        i. **note on map if charity shop**
        ii. **note name on map if notable local independent or national multiple retailer**
    c. **Retail Service**
    d. **Financial/professional Service**
    e. **Other offices**
    f. **Assembly/leisure/hospitality**
        i. **Note on map if Café/restaurant, Bars/pubs, Hot food bar**
    g. **Residential**
    h. **Community/cultural/civic**
    i. **Other**

    *** If more than one floor, shade ground floor use to LHS, and successive floors to RHS**

2. **Count vacant units on spreadsheet and note position on map. Note names of former retailers where identifiable**

3. **Note any general observations about centre. What are the first impressions from main approaches/gateways and arrival points (e.g. bus/train stations)**

4. **Capacity for growth/change**

    a. **Consider area adjoining town centre – is there the physical potential to extend the town centre (think about the street pattern, grain and adjoining uses e.g. residential)**

    b. **Identify location/availability of vacant units or sites – suitable development opportunity sites?**

5. **Note signs of imminent change**
    a. **Retailers etc. about to open/close down?**

6. **Pedestrian Flows**
    a. **Qualitative observations – is area busy vs quiet**

   b. **Pedestrian/vehicular conflict?**
   c. **Quality of pavements etc. well maintained?**

7. **Environmental Quality – note particularly good/bad areas**
   a. **Quality of streetscape, hard landscaping**
   b. **Public realm works**
   c. **Litter, graffiti etc.**

8. **Accessibility**
   a. **Signage, availability of car parking (on and off street) – is it well used?**
   b. **Public transport**

9. **Perception of safety/crime**
   a. **Any evidence of crime?**
   b. **Does the area feel safe to walk about?**

10. **Any other info……**