# Local Development Plan 2032

## Draft Plan Strategy

## Representation Form

Please complete this representation form online and email to LDP@lisburncastlereagh.gov.uk or alternatively print and post a hardcopy to:-

Local Development Plan Team
Lisburn & Castlereagh City Council
Lagan Valley Island
Lisburn
BT27 4RL

**All representations must be received no later that 5pm on the 10th January 2020**

### SECTION A: YOUR DETAILS

**Please tick one of the following:-**

- ○ Individual
- X Planning Consultant / Agent
- ○ Public Sector / Body
- ○ Voluntary / Community Group
- ○ Other

**First Name**

**Last Name**

**Details of Organisation / Body**

Inaltus Limited for Drumkeen Holdings Ltd

**Address**

15 Cleaver Park, Belfast

**Postcode**

BT9 5HX

**Email Address**

**Phone Number**

**Consent to Publish Response**

Under planning legislation we are required to publish responses received in response to the Plan Strategy, however you may opt to have your response published anonymously should you wish.

Even if you opt for your representation to be published anonymously, we still have a legal duty to share your contact details with the Department for Infrastructure and the Independent Examiner appointed to oversee the examination in public into the soundness of the Plan Strategy. This will be done in accordance with the privacy statement detailed in Section C.

- ○ Please publish ***without*** my identifying information
- [X] Please publish with only my Organisation
- ○ Please publish with my Name and Organisation

## SECTION B: YOUR REPRESENTATION

Please set out your comments in full. This will help the independent examiner understand the issues you raise. ***You will only be permitted to submit further additional information to the Independent Examiner if the Independent Examiner invites you to do so.***

### What is your view on the Plan Strategy?

○ I believe it to be **SOUND**

If you consider the Draft Plan Strategy to be **sound**, and wish to support the Plan Strategy, please set out your comments below:-

Not Applicable

*(If submitting a hardcopy & additional space is required, please continue on a separate sheet)*

**OR**

[X] I believe it to be **UNSOUND**

**PLAN COMPONENT** - To which part of the Plan Strategy does your comment relate?

***IF YOU WISH TO SUBMIT ANY FURTHER REPRESENTATIONS, PLEASE COMPLETE SECTION B FOR EACH INDIVIDUAL ISSUE***

**Part 1 – Plan Strategy**

- ◯ Chapter 1 - Introduction
- ◯ Chapter 2 - Policy & Spatial Context
- ◯ Chapter 3 - Vision & Plan Objectives
- ◯ Chapter 4 - Strategic Policies and Spatial Strategy
- ◯ Chapter 4A - Enabling Sustainable Communities & Delivery of New Homes
- ◯ Chapter 4B - Driving Sustainable Economic Growth
- [x] Chapter 4C - Growing our City, Town Centres, Retailing & Other Uses
- ◯ Chapter 4D - Promoting Sustainable Tourism, Open Space, Sport & Outdoor Recreation
- ◯ Chapter 4E - Protecting & Enhancing the Historic & Natural Environment
- ◯ Chapter 4F - Supporting Sustainable Transport & Other Infrastructure
- ◯ Chapter 5 - Monitoring & Review

**Part 2 –Operational Policies**

◯ Operational Policy *(Please State Individual Policy using Policy Reference e.g. HOU 1)* SP14, TC 1 & TC4

**SOUNDNESS TEST:**

Please identify which test(s) of soundness your representation relates to, having regard to Development Plan Practice Note 6 (available on the Planning Portal website at https://www.planningni.gov.uk/index/s/development_plan_practice_note_06_soundness__version_2___may_2017_.pdf )

- ◯ **P1 Has the Plan Strategy been prepared in accordance with the council's timetable and the Statement of Community Involvement?**
- [x] **P2 Has the council prepared its Preferred Options Paper and taken into account any representations made?**
- ◯ **P3 Has the Plan Strategy been subject to sustainability appraisal including Strategic Environmental Assessment?**
- ◯ **P4 Did the Council comply with the regulations on the form and content of its Draft Plan Strategy and procedure for preparing the Draft Plan Strategy?**
- ◯ **C1 Did the Council take account of the Regional Development Strategy?**
- ◯ **C2 Did the Council take account of its Community Plan?**
- [x] **C3 Did the Council take account of policy and guidance issued by the Department?**
- ◯ **C4 Has the plan had regard to other relevant plans, policies and strategies relating to the council's district or to any adjoining council's district?**
- ◯ **CE1 Does the Plan Strategy set out a coherent strategy from which its policies & allocations logically flow & where cross boundary issues are relevant it is not in conflict with the Plan Strategies of neighbouring councils?**
- [x] **CE2 Are the strategy, policies and allocations realistic and appropriate having considered the relevant alternatives and are founded on a robust evidence base?**
- ◯ **CE3 Are there clear mechanisms for implementation and monitoring?**
- [x] **CE4 Is it reasonably flexible to enable it to deal with changing circumstances?**

## DETAILS

Please give details of why you consider the Plan Strategy to be **unsound** having regard to the test(s) you have identified above. Please be as precise as possible.

**See Attached Sheet.**

*(If submitting a hardcopy & additional space is required, please continue on a separate sheet)*

## MODIFICATIONS

If you consider the Plan Strategy to be **unsound,** please provide details of what changes you consider necessary to make the Plan Strategy sound.

**See Attached Sheet**

*(If submitting a hardcopy & additional space is required, please continue on a separate sheet)*

**I wish to attach supporting information with my representation e.g. map** X

***IF YOU WISH TO SUBMIT ANY FURTHER REPRESENTATIONS, PLEASE COMPLETE SECTION B FOR EACH INDIVIDUAL ISSUE***

## SECTION C: DEALING WITH YOUR REPRESENTATION

Please indicate how you would like your representation to be dealt with.

○ Written Representation ☒ Oral Representation

**Please note that the Independent Examiner will be expected to give the same careful consideration to written representations as to those representations dealt with by oral hearing.**

## SECTION D: DATA PROTECTION

In accordance with the Data Protection Act 2018, Lisburn & Castlereagh City Council has a duty to protect any information we hold on you. The personal information you provide on this form will only be used for the purpose of Plan Preparation and will not be shared with any third party unless law or regulation compels such a disclosure.

It should also be noted that in accordance with Regulation 17 of the Planning (Local Development Plan) Regulations (Northern Ireland) 2015, the Council must make a copy of any representation available for inspection. The Council is also required to submit the representations to the Department for Infrastructure (DfI) as they will be considered as part of the Independent Examination process. For further guidance on how we hold your information please visit the privacy section at www.lisburncastlereagh.gov.uk/information/privacy

By proceeding and signing this representation you confirm that you have read and understand the privacy notice above and give your consent for Lisburn & Castlereagh City Council to hold your personal data for the purposes outlined.

Please note that when you make a representation (or counter-representation) to the Local Development Plan your personal information (with the exception of personal telephone numbers, signatures, email addresses or sensitive personal data) will be made publicly available on the council's website. Copies of all representations will be provided to DfI and an Independent Examiner (a third party) as part of the submission of the Local Development Plan for Independent Examination. A Programme Officer will also have access to this information during the IE stages of the Plan preparation. DfI, the Programme Officer and the Independent Examiner will, upon receipt, be responsible for the processing of your data in line with prevailing legislation. If you wish to contact the council's Data Protection Officer, please write to:

Data Protection Officer
Lisburn & Castlereagh City Council,
Civic Headquarters,
Lagan Valley Island,
Lisburn,
BT27 4RL

or send an email to: data.protection@lisburncastlereagh.gov.uk or telephone: 028 9244 7300.

**Signature** 

**Date** 9 January 2020.

# Lisburn and Castlereagh City Council Local Development Plan

## Response to Draft Plan Strategy

Ref: 16/11 (9)(dPS)

Client: Drumkeen Holdings Limited

**DETAILS**

Please give details of why you consider the Plan Strategy to be **unsound** having regard to the test(s) you have identified above. Please be as precise as possible.

**Introduction**

1. Our client Drumkeen Holdings Limited owns Drumkeen Retail Park. We have made a submission to the Council's Preferred Options Paper (POP) (**Appendix A**) wherein we:

   a. provided survey evidence of the close relationship between Drumkeen Retail Park and Foreside Shopping Centre;

   b. requested that the draft Plan Strategy allow for the expansion of Forestside for retailing and non retailing services and that Forestside should be identified as a Metropolitan District Centre reflecting its significant shopping role in the area;

   c. endorsed the Council's Preferred Option of Extending the boundary of Forestside to include Drumkeen Retail Park;

   d. endorsed the inclusion of offices within District Centres;

   e. We endorsed the proposed expanded boundary of Forestside provided at POP Appendix H Map 14.

2. We have reviewed the draft Plan Strategy and regrettably we now object to the draft Plan Strategy on the basis as it is unsound for the following reasons:

   - P2 The Council has not taken properly into account representations made at the POP stage. Respondents to the POP supported the retail hierarchy including the expansion and designation of District Centres;
   - C3 The Council has not taken account of the SPPS and the requirement to define a network and hierarchy of centres including District Centres. A fundamental aspect of this must be to define the extent of District Centre boundaries;

- CE2 The designation of the District Centre boundary has been deferred to the Local Policies Plan when it is a strategic matter. The evidence base in the form of the Retail Capacity Study should inform the Plan Strategy, however it is flawed in its methodology and the consequence will be the boundary of the District Centre could be unnecessarily constrained if considered separately in the Local Policies Plan;
- CE4 The Plan lacks flexibility as it is not clear what scale of retail demand and need there is in Castlereagh around Forestside and how that can be accommodated.

**General Comments**

3. In general our clients are disappointed that the expanded District Centre boundary has not been confirmed in the draft Plan Strategy which would have brought Drumkeen Retail Park into the District Centre. They are also surprised that the Council finds that there is evidence of only limited future retail need in Forestside. In light of these observations we have sought to understand why such a limited retail need has been identified.

**PE2**

4. The Council have already placed on record its preference to expand the boundary of Forestside and to include the Drumkeen Retail Park as part of an enlarged District Centre. Our clients are owners of Drumkeen Retail Park and have positively endorsed this proposal. It is unclear why the Council have not carried through their preferred option and appear to have postponed its adoption until the Local Policies Plan stage.

**CE2 & CE3**

5. The designation of a District Centre and its boundary are strategic matters that should be considered in the draft Plan Strategy. The Council have already commissioned Ove Arup and Roderick MacLean Associates Ltd to undertake a Retail Capacity Study for the LCCC area.

**General Conclusions of the draft Plan Strategy**

6. The outworking of the Retail Capacity Study is set out in the draft Plan Strategy page 98 and states that *"The study forecasted that retail capacity in the Forestside catchment would support modest additions to the comparison retail offer"*. In our view this underestimates the important role and strength of Forestside. Any shopper that regularly visits Forestside will know that it is extremely busy and displays all the symptoms of an overtrading shopping location. It is a fully occupied centre, has major anchor tenants, high end retailers throughout the mall, provides extremely popular M&S cafe and other cafes, and also includes ancillary concession units. Its car parking regularly operates close to capacity throughout peak trading times.

7. To inform this statement the draft Plan Strategy has been informed by Technical Supplement 5 the Retail Capacity Study and given that we dispute the findings it is necessary to examine the Retail Capacity Study itself. Below are the key findings of the Retail Capacity Study.

**Findings of the Retail Capacity Study – Convenience Retailing**

8. In **convenience** retailing terms Tables 4.5 and 4.8 of the Retail Capacity Study show that the Forestside Catchment has a survey turnover (including some inflow) of £71.7million and that its benchmark turnovers should in fact be £76 million. The Retail Capacity Study suggests that the shopping in the Forestside area is undertrading by some £4.3million in convenience terms. Table 5.2 suggests that there is no spare capacity in the Forestside catchment for convenience retailing.

9. The Retail Capacity Study makes the assumption that 50% of Forestside's turnover comes from outside the catchment and effectively doubles its turnover – a turnover that is derived from a semi-rural Castlereagh catchment area. This ignores the fact that Forestside has a trade draw from as far away as Saintfield, Crossgar, Downpatrick and Ballynahinch and large parts of rural County Down as well as south, east and west Belfast.

10. The Retail Capacity Study takes a different approach to assessing Forestside to that adopted for Lisburn and Sprucefield where on street surveys where undertaken to seek to understand the extent of the catchment of these centres. There was no reason the Retail Capacity Study should not have undertaken:-

    a. a household survey of a 10-15 minute drive time study area for Forestside to understand the extend of its draw in County Down and the south, west and east Belfast area; and
    b. a shopper survey to understand the scale of visitors to the Centre from beyond the drive time.

11. Such information would have properly informed the turnover of Forestside and the level of inflow involved.

12. The Retail Capacity Study Table 5.2 includes a footnote that *"The current undertrading (of Forestside catchment area) does not suggest a strong platform for introducing additional floorspace through clawback of some leakage, so there is no high estimate"*. This misunderstands the level of overtrading in Forestside and the available headroom capacity that would support additional retailing as discussed below.

13. The Retail Capacity Study contradicts the findings of the BMAP Retail Study prepared by Colliers in 2004-2006 (the Colliers Report) (Extracts of the 2006 Update Version is at **Appendix B**). It can be noted that the Colliers Report found Forestside Shopping Centre to have a convenience turnover of £93 million in 2002, rising to £97 million in 2005, £99 million in 2010 and £106 million in 2015.

14. The Council suggests that Forestside Shopping Centre (i.e. Sainsbury's and M&S) has a turnover of £39.8million, which given the Colliers Report findings, indicates a significant conflict between evidence and calls into question the robustness of the Council's Retail Capacity Study.

15. A site visit of Forestside would show clear overtrading in both main convenience shops at Forestside. To have such different figures between the Council's and Department of Environment's consultants should be addressed in the Retail Capacity Study. The Retail Capacity Study suggests there is no need for any more convenience retailing in the Forestside catchment between 2017 and 2027. This is contradicted by the sheer busyness of the main shops in the area, the level of affluence of the south Belfast catchment and the findings of the Colliers Report that found that Forestside Shopping Centre needed 2,692 sq m net convenience floorspace by 2015 which has never been provided.

**Findings of the Retail Capacity Study – Comparison Retailing**

16. In **comparison** retailing terms the Retail Capacity Study undertakes a survey to determining turnovers, again with only an estimate at the level of inflow for Forestside to be 50% of survey based turnovers. Table 6.8 finds Forestside Shopping Centre to have a turnover in 2017 of £54 million.

17. The Retail Capacity Study para 6.6.4 states that "*Unlike convenience retailing comparison retailing is not dominated by a few participants, so the concept of over/undertrading has limited application for comparison retailing. The exceptions are retail parks where the published average company turnovers are available and can be applied*". Forestside has a limited number of shops all high street brands and there is clearly an opportunity to understand the level of over/undertrading in the Centre. This could have been done as many of the occupants of the Centre would have sales densities published by Mintel or Verdict, or a close comparison could have been applied. As such, the Retail Capacity Study relies upon the results of a limited household survey and a guess about the level of inflows to the Centre to estimate turnover of the Forestside Catchment. Any growth estimates is therefore limited to only the growth in population and spend and pro rata increase in inflow and does not take account of the need to provide retail floorspace to relieve the pressures currently experienced in shops due to overtrading.

18. The approach of the Retail Capacity Study could have employed the same survey methods we highlight in respect of convenience terms in para 10 above. It would be possible to more fully understand the

turnover and overtrading of Forestside in comparison terms had the suggested methodology been applied.

19. Our reasons for challenging the Retail Capacity Study's findings in comparison terms is again based on our experience of the busyness of Forestside and also the evidence presented in the Colliers Report which found Forestside Shopping Centre had a 2002 turnover of £114 million which would rise to £140 million in 2005 and £170 million in 2010 and £204 million in 2015. Moreover, even after commitments the Colliers Report found there to be a retail headroom (or need) for 18,063 sq m of comparison goods in Forestside.

20. The finding of the Retail Capacity Study set out at Table 7.2 is that the Forestside catchment area has a need of between 1,400 sq m and 4,700 sq m net comparison floorspace between 2017 and 2027.

21. Again, given the significant differences between the two studies there must be a question over the robustness of the Retail Capacity Study.

22. The Retail Capacity Study conclusion at para 8.3.1-8.3.2 indicates that while there is no need for convenience retailing in the Forestside Catchment, this would not rule out very small development proposals. It also notes that the indicative floorspace of 1,400 sq m net to 1,700 sq m net of comparison floorspace could support additions to the existing Centre and Retail Park.

23. Notwithstanding our concerns that the Retail Capacity Study underestimates future retail need, our clients support the conclusion at para 8.8.2 which states that "*The forecast retail capacity in the Forestside catchment should support modest additions to the comparison retail offer, and* <u>*the existing retail uses on the proposed expansion site would support and consolidate Forestside in its role as a district shopping centre*</u>". [emphasis added]

24. Overall we acknowledge that the Retail Capacity Study does endorse the expansion of the District Centre boundary to include Drumkeen Retail Park and that it would be a suitable location for additional comparison retailing. However, we consider that the Retail Capacity Study has underestimated the retail need in the area and this is a direct result of failure to properly deal with Forestside's geographical location on the boundary between Castlereagh and Belfast and the attraction and trade drawn to the Centre from south Belfast and wider County Down. We consider Forestside to be overtrading and there is a need for additional retailing in the area to be accommodated.

**What Should the draft Plan Strategy deal with?**

25. There are four broad matters of a strategic nature that the draft Plan Strategy must deal with.

a. What is the retail need for the Forestside catchment;
b. Where should that need be provided (i.e. an expanded Forestside and Carryduff);
c. What is the appropriate boundary for both retail locations;
d. What is the policy basis that will direct the retail need to the identified locations to ensure the two centres complement each other.

26. These are a matters that must be assessed at the draft Plan Strategy. Failure to properly understand the need for retailing at Forestside could mean it is unnecessarily constrained by a tightly defined District Centre boundary and policy basis that discourages investment.

27. Furthermore, these important matters should be addressed at the draft Plan Strategy stage to ensure that retail investment can continue before the final adoption of the Local Policies Plan. The timescale of the Local Policies Plan is likely to be extensive with the Council and Planning Appeals Commission having to give consideration to housing, industrial and other land use zonings for multiple sites. It is inappropriate given the strategic nature of a District Centre that its boundary definition be held up by local site specific issues that a Local Policies Plan will consider.

**Retail Need**

28. Given our comments above, we consider it important that the Council reconsider its Retail Capacity Study to more fully understand the retail need for this catchment area. We consider the estimates presented to date to be the very minimum requirement for additional retail floorspace in the catchment area. We reserve the right to comment further when the Council updates its Retail Capacity Study in light of our comments above.

**Where Should the Retail Need be Accommodated?**

29. We endorse the findings of the Retail Capacity Study that the additional comparison floorspace identified should be accommodated at Drumkeen Retail Park. The Retail Capacity Study finds that Carryduff has consent of a Lidl store and that "*significant further additions are likely to be minor*". However, the policy approach set out in the draft Plan Strategy requires any new retail proposal to be first located in Carryduff. This is an inconsistency between the Retail Capacity Study and how it has been interpreted in the draft Plan Strategy. The draft Plan Strategy should confirm that the identified retail need set out in the Retail Capacity Study should be accommodated at the Drumkeen Retail Park in the expanded Forestside District Centre.

**The Boundary of Forestside District Centre and Carryduff**

30. Our clients endorse the inclusion of Drumkeen Retail Park in the Forestside District Centre. While there is no evidence to suggest that the boundary of Carryduff should be altered, there could be a case that it could be reduced to remove the Lowes Industrial Estate given this site is not suitable for retail use due to long established industrial buildings and tenants on the site and the poor accessibility of the site.

**Policy Basis for Directing Retail**

31. The SPPS para 6.277 states LDPs should set out appropriate policies that make clear which uses will be permitted in the hierarchy of centres and other locations. The Draft Plan Strategy policy should recognise the important role of Forestside District Centre and its relationship with Carryduff. The policy should seek to include an allowance that Forestside and Carryduff are both locations that are suitable for additional retail investment of a scale defined in the Retail Capacity Study. While the town centre first approach should be applied to Carryduff having regard to its role and function, there is scope to allow additional retailing at Forestside that consolidates Forestside's role and will complement Carryduff town centre.

32. Considering the retail policies we would comment as follows:

33. Strategic Policy 14 should note that Forestside District Centre is an important part of the retail hierarchy and that it will be promoted as a location to accommodate retail need as identified in the Retail Capacity Study.

34. Policy TC 1 should include District Centres as a location in the sequential approach so that the policy reflects the network and hierarchy of centres in the Council area.

35. Policy TC 4 should be amended to allow proposals that meet a "defined retail need" as opposed to "local need". This change would reflect the findings of the Retail Capacity Study.

**MODIFICATIONS**

If you consider the Plan Strategy to be **unsound,** please provide details of what changes you consider necessary to make the Plan Strategy sound.

36. To make the Plan sound it needs to :-

    1. Prepare a robust Retail Capacity Study for the south Belfast/Castlereagh area that understands turnover and level of overtrading currently occurring at Forestside;

2. Designate Forestside as a District Centre and include the Drumkeen Retail Park within its boundary suitable to accommodate defined retail need;
3. Amend Strategic Policy 14 to allow the future growth of the Forestside District Centre catering for convenience and comparison needs;
4. Amend policy TC 1 to include the District Centre of Forestside as a sequentially preferable location;
5. Amend policy TC4 to replace the words *"local need"* with *"defined retail need"*.

**Appendix**

| | |
|---|---|
| A | POP Submission |
| B | Extracts of Colliers Report |

# APPENDIX A

## Preferred Options Paper

## Response Form

Lisburn & Castlereagh City Council has commenced preparation of its first Local Development Plan (LDP). The LDP will be produced in two parts consisting firstly of a Plan Strategy followed by a Local Policies Plan:

- **The Plan Strategy** will set the aims, objectives, growth strategy and strategic policies applicable to the Plan area.
- **The Local Policies Plan** will provide site specific policies and proposals, including settlement limits, land use zonings and environmental designations.

Both documents will guide future growth and development and provide the policy context for the consideration of applications for planning permission.

The Council wants your views on the **Preferred Options Paper (POP)** - the first stage in the preparation of the LDP which will inform the Plan Strategy. All documentation for the POP can be viewed at www.lisburncastlereagh.gov.uk/resident/planning/local-development-plan

The easiest and quickest way to comment is by using the online questionnaire which is available on the Council's website at www.lisburncastlereagh.gov.uk/resident/planning/local-development-plan

Alternatively, please complete and return this questionnaire by email to LDP@lisburncastlereagh.gov.uk or download a copy of this form and post to: **Development Plan Team, Civic Headquarters, Lagan Valley Island, Lisburn, Co. Antrim, BT27 4RL**. Responses must be received no later than ***5pm on Thursday 25th May 2017***.

Please note that in order for comments to be considered valid you must include your contact details. We will use these details to confirm receipt of comments and to seek clarification or request further information. ***Anonymous comments or comments which do not directly relate to the Preferred Options Paper will not be considered as part of the consultation process.***

Comments made on this consultation will be made public, which may include identifying details such as your name or organisation. Should you have any concerns regarding the holding of such information please contact LDP@lisburncastlereagh.gov.uk

| | |
|---|---|
| **Name** | |
| **Organisation *(if applicable)*** | Drumkeen Holdings Limited |
| **Address** | C/O Inaltus Limited<br>15 Cleaver Park<br>BELFAST |
| **Postcode** | BT9 5HX |
| **Email Address** | |
| **Telephone Number** | |

Essential supporting documents such as maps or images may be submitted with this response form and sent to LDP@lisburncastlereagh.gov.uk

Please indicate whether you will be submitting supporting documents.

Yes ☐ No ☐

If you are sending supporting documents, please list the titles of those documents here:

| |
|---|
| We are submitting the Drumkeen Shoppers Survey dated January 2019. This shows the complementary role between Drumkeen Retail Park and Forestside Shopping Centre. |

Your comments are sought on the Preferred Options Paper and each of the identified Preferred Options. Please indicate whether you agree with the Council's Preferred Option or one of the alternative options.

These questions are ordered in accordance with the Preferred Options Paper. Please read each section before answering the question. Should you continue on a separate sheet, please number your response in accordance with the relevant Option.

**Preferred Options Paper**

**Sections 1-4:**

**Q1** **Do you have any comments on the opening Sections 1-4 of the Preferred Options Paper that should be taken into account when preparing the Plan Strategy?**

Make a comment here:

It would be appropriate to place the retail environment of the area in context in Section 4. The Council's retail hierarchy includes some of the largest retail centres in Northern Ireland and this should be identified and set out in a policy and geographical context.

**Q5** **Do you agree with the Strategic objectives (A-F) of the LDP outlined in Section 6?**

**Yes** ☐ **No** ☐

Make a comment here:

A strategic objective must include the expansion of Forestside to accommodate growth and a mixture of retailing and non retailing services.

Forestside's position in the hierarchy should be highlighted alongside that of Lisburn City Centre and Sprucefield Shopping Centre. It should be allocated as a Metropolitan District Centre, reflecting its significant shopping role in the area.

**Q17** **Key Issue 12: Strengthening Existing Town Centres**

***(Please refer to Section 7C of the Preferred Options Paper for full details)***

Please choose **only one** of the following:

- ▢ ***OPTION 12A – PREFERRED OPTION - Retain the existing town centre of Carryduff and designate town centre boundaries in the historic towns of Hillsborough and Moira***

- ▢ ***Option 12B – Retain the existing town centre of Carryduff***

Make a comment on your choice here:

We recognise the desire to maintain Carryduff as a town centre. While that is appropriate, it is important that the role of Carryduff is guided through policy that reflects its localised function and catchment. Carryduff does not compete for the same retailers that are attracted to Forestside and Drumkeen and it should be acknowledged in the Plan that the success of both Carryduff and Forestside will be when the two perform complementary and not competing roles. In this way, the Council can focus their efforts in regenerating Carryduff as a local shopping and service centre for its immediate population, while still ensuring that Drumkeen and Forestside are allowed to develop to support the shopping needs of the area.

## Q19 Key Issue 14: Strengthening District & Local Centres

***(Please refer to Section 7C of the Preferred Options Paper for full details)***

Please choose **only one** of the following:

- ▢ ***OPTION 14A – PREFERRED OPTION - Extend District and Local Centre Boundaries***

- ▢ ***Option 14B – Retain the existing boundaries at Forestside District Centre and Dundonald Local Centre***

Make a comment on your choice here:

We fully endorse the Council's preferred option in 14A. Our clients own Drumkeen Retail Park and the ability of the Council to attract inward retail investment and new retailers for the south Belfast area, is through the widening of the District Centre boundary and to allocate Drumkeen Retail Park within the District Centre.

As owners of the Drumkeen Retail Park, would be willing to work with the Council to consider the potential of subdivision or alteration of the Retail Park to make it suitable to accommodate the growing demands of retailers seeking a location in the south Belfast area. We have provided evidence to the Council in respect of the Council decision on the proposed occupation of Unit 1 Drumkeen Retail Park by TK Maxx that demonstrates that shoppers would continue to visit Forestside as part of their trip to Drumkeen if TK Maxx opens. This illustrates the complementary role that Drumkeen and Forestside can have. A copy of this is included with this submission.

## Q21 Key Issue 16: Promoting Office Development within the City, Town, District and Local Centres

***(Please refer to Section 7C of the Preferred Options Paper for full details)***

***OPTION 16A – PREFERRED OPTION - Promoting Office Development within the City, Town, District and Local Centres[1]***

Do you agree with the Preferred Option? Yes ☐ No ☐

Make a comment here:

We would endorse the inclusion of office development within District and Local Centres. At Forestside, the enlargement of the Centre boundary would introduce office development at the Council's offices. Lands within the larger boundary may also become available to provide new office accommodation.

Such additional uses would support the local economy and employment in the area. It would again be complementary to the retailing function of Forestside and Drumkeen.

## Q39 Do you have any comments on the remaining appendices?

**Yes** ☐ **No** ☐

Appendix H Map 14 provides the boundary of the expanded Forestside District Centre. We note the extent of this and wholly endorse it as a robust and defendable area, and one that reflect spolicy SPPS.

We consider the proposed boundary designation in the Plan to be sound.

[1] Office development is also permitted within the Major Employment Locations (MELs) See Options 6 & 7

**Q40 Do you have any further comments about the Local Development Plan Preferred Options Paper?**

**Yes** ☐ **No** ☐

| |
|---|
| No Comment |

***Thank you for completing this questionnaire. Please ensure that all comments are submitted before the deadline of 5pm on Thursday 25th May 2017***

# APPENDIX B

**BELFAST METROPOLITAN AREA PLAN:**
**RETAIL STUDY: UPDATE**

**On behalf of**

**DEPARTMENT OF ENVIRONMENT,**
**PLANNING SERVICE**

**May 2006**

COLLIERS CRE

Colliers CRE
Chartered Surveyors and International Property Consultants

**Table 11 : Calculation of Potential All Comparison Goods 'Headroom' Expenditure, 2005 (£ million)**

| Centre | 2002 Turnover | 2005 Turnover Potential | Turnover Allocation for Existing Retailers 2002-2005 | Residual Turnover Potential by 2005 | Potential Headroom Expenditure by 2005 |
|---|---|---|---|---|---|
| | A *[from Table 8, Col C]* | B *[from Table 10]* | C *[see Note (1)]* | D *[D = B - C]* | E *[E = D - A]* |
| **Within BMAP** | | | | | |
| **Belfast CC area** | | | | | |
| Belfast City Centre - Regional Centre | 813.0 | 965.4 | 34.2 | 931.2 | 118.2 |
| Connswater - District Centre | 71.1 | 87.8 | 4.0 | 83.8 | 12.7 |
| Kennedy Way - District Centre | 4.9 | 6.0 | 0.6 | 5.4 | 0.5 |
| Park Centre - District Centre | 23.2 | 28.6 | 1.4 | 27.1 | 3.9 |
| Westwood Centre - District Centre | 2.9 | 3.6 | 0.8 | 2.8 | -0.1 |
| Yorkgate - District Centre | 8.4 | 10.4 | 2.0 | 8.4 | 0.0 |
| Cromlin Road / Hillview (u/c) | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Belfast CC area - Other | 134.5 | 164.2 | 15.6 | 148.6 | 14.1 |
| Sub Total | 1058.0 | 1365.9 | 58.6 | 1207.3 | 149.3 |
| **Carrickfergus BC area** | | | | | |
| Carrickfergus Town Centre | 13.3 | 16.4 | 1.2 | 15.3 | 2.0 |
| Carrickfergus BC area Other | 1.1 | 1.4 | 0.2 | 1.2 | 0.0 |
| Sub Total | 14.4 | 17.8 | 1.4 | 16.5 | 2.0 |
| **Castlereagh BC area** | | | | | |
| Carryduff Town Centre | 1.2 | 1.5 | 0.4 | 1.0 | -0.2 |
| Dundonald Village | 1.5 | 1.8 | 0.2 | 1.6 | 0.1 |
| Forestside / Upper Galwally - District Centre | 103.9 | 140.3 | 5.3 | 135.0 | 31.1 |
| Castlereagh BC area - Other | 5.2 | 6.3 | 0.2 | 6.1 | 0.9 |
| Sub Total | 111.7 | 149.9 | 6.1 | 143.8 | 32.1 |
| **Lisburn BC area** | | | | | |
| Lisburn City Centre | 214.2 | 260.9 | 9.5 | 251.4 | 37.2 |
| Sprucefield - Regional Centre | 68.3 | 82.4 | 4.5 | 77.9 | 9.6 |
| Dairy Farm - District Centre | 1.1 | 1.4 | 0.1 | 1.3 | 0.2 |
| Hillsborough | 0.8 | 0.9 | 0.1 | 0.8 | 0.1 |
| Moira | 2.9 | 3.6 | 0.3 | 3.3 | 0.4 |
| Lisburn CC area - Other | 18.6 | 23.0 | 2.2 | 20.8 | 2.2 |
| Sub Total | 305.8 | 372.3 | 16.7 | 355.6 | 49.8 |
| **Newtownabbey BC area** | | | | | |
| Ballyclare Town Centre | 5.6 | 7.0 | 0.5 | 6.5 | 0.9 |
| Abbey Centre - District Centre | 165.2 | 201.9 | 11.4 | 190.5 | 25.3 |
| Glengormley Village | 7.3 | 9.0 | 0.5 | 8.6 | 1.3 |
| Northcott Centre - District Centre | 4.3 | 5.3 | 1.1 | 4.2 | -0.1 |
| Newtownabbey BC area - Other | 1.5 | 1.8 | 0.8 | 1.0 | -0.4 |
| Sub Total | 183.8 | 225.0 | 14.3 | 210.8 | 27.0 |
| **North Down BC area** | | | | | |
| Bangor Town Centre | 66.1 | 81.3 | 4.5 | 76.8 | 10.7 |
| Holywood Town Centre | 3.0 | 3.7 | 0.6 | 3.1 | 0.1 |
| Bloomfield - District Centre | 81.4 | 100.1 | 3.1 | 97.0 | 15.6 |
| Springhill - District Centre | 3.8 | 4.7 | 0.4 | 4.4 | 0.5 |
| North Down area - Other | 26.1 | 32.1 | 3.9 | 28.3 | 2.3 |
| Sub Total | 180.4 | 221.9 | 12.5 | 209.6 | 29.2 |
| **Total** | 1,864.1 | 2,352.9 | 109.3 | 2,143.6 | 279.5 |

Note:

(1) We assume that existing comparison goods floorspace at the base year (2002) will achieve real sales productivity gains of 1.25% per annum. This figure is based on the latest published research by EBS (see Appendix 2G). The store productivity gains are applied to the 2002 benchmark comparison goods turnovers for each centre / retail category as set out in Table 8, Column G.

**Table 14 : Calculation of Potential All Comparison Goods 'Headroom' Expenditure, 2010 (£ million)**

| Centre | 2002 Turnover | 2010 Turnover Potential | Turnover Allocation for Existing Retailers 2002-2010 | Residual Turnover Potential by 2010 | Potential Headroom Expenditure by 2010 |
|---|---|---|---|---|---|
| | A (from Table 8 Col C) | B (from Table 13) | C (see Note (1)) | D (D = B - C) | E (E = D - A) |
| **Within BMAP** | | | | | |
| **Belfast CC area** | | | | | |
| Belfast City Centre - Regional Centre | [illegible] | [illegible] | [illegible] | 1040.3 | [illegible] |
| Connswater - District Centre | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| Kennedy Way - District Centre | 4.9 | 7.3 | 1.8 | [illegible] | [illegible] |
| Park Centre - District Centre | [illegible] | 34.5 | 4.8 | [illegible] | 7.2 |
| Westwood Centre - District Centre | 2.9 | 4.3 | 2.2 | 2.2 | -0.8 |
| Yorkgate - District Centre | 6.4 | 12.5 | [illegible] | 7.0 | [illegible] |
| Crumlin Road / Hillview (u/c) | [illegible] | [illegible] | 0.0 | 0.0 | [illegible] |
| Belfast CC area - Other | 134.5 | 197.2 | [illegible] | 153.2 | [illegible] |
| Sub Total | [illegible] | 1499.1 | 165.4 | 1333.5 | 375.7 |
| **Carrickfergus BC area** | | | | | |
| Carrickfergus Town Centre | [illegible] | [illegible] | 3.5 | [illegible] | [illegible] |
| Carrickfergus BC area Other | 1.1 | 1.7 | [illegible] | [illegible] | [illegible] |
| Sub Total | 14.4 | 21.7 | 3.9 | 17.8 | 3.4 |
| **Castlereagh BC area** | | | | | |
| Carryduff Town Centre | 1.2 | 1.1 | [illegible] | 0.5 | [illegible] |
| Dundonald Village | 1.5 | 2.2 | [illegible] | [illegible] | 0.2 |
| Forestside / Upper Galwally - District Centre | 113.9 | [illegible] | 14.0 | [illegible] | [illegible] |
| Castlereagh BC area - Other | 5.2 | 7.6 | [illegible] | [illegible] | 1.0 |
| Sub Total | 121.7 | 181.1 | 17.3 | 163.8 | 42.0 |
| **Lisburn BC area** | | | | | |
| Lisburn City Centre | 214.2 | [illegible] | 26.9 | [illegible] | [illegible] |
| Sprucefield - Regional Centre | 68.1 | 98.5 | 12.7 | 85.8 | [illegible] |
| Dairy Farm - District Centre | 1.1 | [illegible] | 0.2 | 1.5 | 0.5 |
| Hillsborough | 0.8 | 1.2 | 0.3 | [illegible] | [illegible] |
| Moira | 2.9 | [illegible] | 0.6 | [illegible] | [illegible] |
| Lisburn CC area - Other | 18.6 | [illegible] | 6.2 | [illegible] | [illegible] |
| Sub Total | 305.8 | 447.8 | 47.0 | 399.9 | 94.1 |
| **Newtownabbey BC area** | | | | | |
| Ballyclare Town Centre | [illegible] | [illegible] | 1.5 | [illegible] | [illegible] |
| Abbey Centre - District Centre | [illegible] | [illegible] | 32.0 | [illegible] | [illegible] |
| Glengormley Village | [illegible] | 31.0 | 3.3 | 9.6 | [illegible] |
| Northcott Centre - District Centre | 4.3 | 6.4 | 3.2 | 3.3 | [illegible] |
| Newtownabbey BC area - Other | [illegible] | 2.2 | 2.2 | [illegible] | [illegible] |
| Sub Total | 183.8 | 271.0 | 40.2 | 230.8 | 46.9 |
| **North Down BC area** | | | | | |
| Bangor Town Centre | 66.1 | 98.0 | [illegible] | 85.3 | [illegible] |
| Holywood Town Centre | 3.0 | 4.8 | 1.6 | 2.8 | [illegible] |
| Bloomfield - District Centre | 81.4 | [illegible] | 8.7 | [illegible] | [illegible] |
| Springhill - District Centre | 3.8 | [illegible] | 1.0 | 4.7 | [illegible] |
| North Down area - Other | 26.1 | [illegible] | 10.4 | 20.1 | 2.0 |
| Sub Total | 180.4 | 267.4 | 34.6 | 232.9 | 52.5 |
| Total | 1,864.1 | 2,687.3 | 308.5 | 2,378.8 | 514.7 |

Note:

(1) We assume that existing comparison goods floorspace at the base year (2002) will achieve real sales productivity gains of 2.35% per annum. This figure is based on the latest published research by EBS (see Appendix 2G). The store productivity gains are applied to the 2002 benchmark comparison goods turnovers for each centre / retail category as set out in Table 8, Column G.

**Table 17 : Calculation of Potential All Comparison Goods 'Headroom' Expenditure, 2015 (£ million)**

| Centre | 2002 Turnover | 2015 Turnover Potential | Turnover Allocation for Existing Retailers 2002-2015 | Residual Turnover Potential by 2015 | Potential Headroom Expenditure by 2015 |
|---|---|---|---|---|---|
| | A *[from Table 4, Col C]* | B *[from Table 14]* | C *[see Note (1)]* | D *[D = B - C]* | E *[E = D - A]* |
| **Within BMAP** | | | | | |
| **Belfast CC area** | | | | | |
| Belfast City Centre - Regional Centre | 619.0 | 1,336.0 | 186.3 | 1189.7 | 354.7 |
| Connswater - District Centre | 71.1 | 120.3 | 19.4 | 101.8 | 37.0 |
| Kennedy Way - District Centre | 4.9 | 8.7 | 3.1 | 5.7 | 0.8 |
| Park Centre - District Centre | 25.2 | 41.5 | 7.0 | 34.4 | 11.3 |
| Westwood Centre - District Centre | 2.9 | 5.2 | 3.8 | 1.4 | -1.5 |
| Yorkgate - District Centre | 8.4 | 10.3 | 4.5 | 5.5 | -2.9 |
| Cromac Road / Hillview (o/c) | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Belfast CC area - Other | 134.5 | 235.4 | 75.6 | 160.0 | 25.5 |
| **Sub Total** | **1058.0** | **1770.4** | **284.8** | **1485.6** | **427.6** |
| **Carrickfergus BC area** | | | | | |
| Carrickfergus Town Centre | 13.3 | 24.3 | 5.6 | 18.6 | 5.4 |
| Carrickfergus BC area Other | 1.1 | 2.1 | 1.1 | 0.8 | -0.2 |
| **Sub Total** | **14.4** | **26.3** | **6.7** | **19.6** | **5.3** |
| **Castlereagh BC area** | | | | | |
| Carryduff Town Centre | 1.2 | 2.1 | 2.3 | 0.0 | -1.2 |
| Dundonald Village | 1.5 | 2.6 | 0.9 | 1.8 | 0.3 |
| Forestside / Upper Galwally - District Centre | 113.9 | 203.6 | 25.6 | 177.9 | 64.0 |
| Castlereagh BC area - Other | 5.2 | 9.3 | 1.2 | 8.0 | 2.8 |
| **Sub Total** | **121.7** | **217.6** | **29.8** | **187.7** | **66.0** |
| **Lisburn BC area** | | | | | |
| Lisburn City Centre | 214.3 | 374.0 | 46.3 | 329.5 | 114.3 |
| Sprucefield - Regional Centre | 68.1 | 117.4 | 21.8 | 95.5 | 27.4 |
| Dairy Farm - District Centre | 1.1 | 2.0 | 0.4 | 1.6 | 0.5 |
| Hillsborough | 0.8 | 1.4 | 0.5 | 0.9 | 0.1 |
| Moira | 2.9 | 5.3 | 1.3 | 3.4 | 0.0 |
| Lisburn CC area - Other | 18.6 | 33.5 | 10.6 | 22.9 | 4.3 |
| **Sub Total** | **305.8** | **534.3** | **81.0** | **453.3** | **147.5** |
| **Newtownabbey BC area** | | | | | |
| Ballyclare Town Centre | 5.8 | 10.8 | 2.6 | 8.2 | 2.4 |
| Abbey Centre - District Centre | 165.2 | 290.2 | 55.2 | 235.1 | 69.9 |
| Glengormley Village | 7.3 | 13.4 | 2.2 | 11.2 | 3.9 |
| Northcott Centre - District Centre | 4.3 | 7.6 | 5.4 | 2.2 | -2.2 |
| Newtownabbey BC area - Other | 1.5 | 2.7 | 3.9 | -1.2 | -2.7 |
| **Sub Total** | **183.8** | **324.7** | **69.3** | **255.4** | **71.6** |
| **North Down BC area** | | | | | |
| Bangor Town Centre | 66.1 | 127.5 | 31.8 | 95.7 | 29.6 |
| Holywood Town Centre | 3.0 | 5.2 | 2.7 | 2.5 | -0.5 |
| Bloomfield - District Centre | 81.4 | 144.6 | 15.0 | 129.5 | 48.1 |
| Springhill - District Centre | 3.8 | 6.8 | 1.7 | 5.1 | 1.3 |
| North Down area - Other | 26.1 | 46.4 | 18.2 | 28.2 | 2.1 |
| **Sub Total** | **183.4** | **320.6** | **59.5** | **261.0** | **80.6** |
| **Total** | **1,864.1** | **3,193.8** | **531.2** | **2,662.6** | **798.5** |

**Note:**

**(1) We assume that existing comparison goods floorspace at the base year (2002) will achieve real sales productivity gains of 2.25% per annum. This figure is based on the latest published research by EBS (see Appendix 2G). The store productivity gains are applied to the 2002 benchmark comparison goods turnovers for each centre / retail category as set out in Table 8, Column G.**

**Table 20 : Calculation of Residual Headroom Expenditure and Retail Floorspace Need by Centre (Including Soft Proposals), 2015**

| Centre | Potential Headroom Expenditure by 2015 (£m) | Adjustment for Over/Under Trading in Base Year (£m) | Adjusted Headroom Expenditure by 2015 (£m) | Reduction in Expenditure due to Comparison Goods Floorspace Opening for Trading, 2002-05, Retail Commitments and Retail Proposals [1] (£m) | Adjusted Residual Headroom Expenditure by 2015 (£m) | Assumed Sales Density in 2015 [2] (£ per sq m) | Estimated Retail Floorspace Need in 2015 (Sq M Net) |
|---|---|---|---|---|---|---|---|
| | A | B | C | D | E | F | G |
| | [ From Table 17 Col. E ] | [ From Table 8 Col. H ] | [ C = A + B ] | | [ E = C - D ] | | [ G = E / F ] |
| **Within BMAP** | | | | | | | |
| **Belfast CC area** | | | | | | | |
| Belfast City Centre - Regional Centre | 356.7 | 317.2 | 673.9 | 700.1 | -26.2 | 4,997 | -5,247 |
| Connswater - District Centre | 37.8 | 13.2 | 50.9 | 46.4 | 4.5 | 4,997 | 904 |
| Kennedy Way - District Centre | 0.8 | -4.2 | -3.3 | 23.3 | -26.7 | 4,997 | -5,338 |
| Park Centre - District Centre | 11.3 | 2.2 | 13.4 | 13.1 | 0.3 | 4,997 | 63 |
| Westwood Centre - District Centre | -1.5 | -8.3 | -9.8 | 46.2 | -56.0 | 4,997 | -11,211 |
| Yorkgate - District Centre | -2.9 | -20.0 | -22.9 | 0.0 | -22.9 | 4,997 | -4,575 |
| Crumlin Road / Hillview (u/c) | 0.0 | 0.0 | 0.0 | 30.9 | -30.9 | 4,997 | -6,181 |
| Belfast CC area - Other | 25.5 | -91.1 | -65.6 | 241.8 | -307.4 | 4,997 | -61,508 |
| Sub Total | 427.6 | 208.9 | 636.5 | 1,101.7 | -465.2 | - | -93,089 |
| **Carrickfergus BC area** | | | | | | | |
| Carrickfergus Town Centre | 5.4 | -3.5 | 1.9 | 24.3 | -22.4 | 4,997 | -4,483 |
| Carrickfergus BC area - Other | -0.2 | -2.2 | -2.4 | 19.4 | -21.8 | 4,997 | -4,363 |
| Sub Total | 5.2 | -5.7 | -0.5 | 43.7 | -44.2 | - | -8,850 |
| **Castlereagh BC area** | | | | | | | |
| Carryduff Town Centre | -1.2 | -5.2 | -6.4 | 0.0 | -6.4 | 4,997 | -1,280 |
| Dundonald Village | 0.3 | -1.1 | -0.8 | 0.0 | -0.8 | 4,997 | -167 |
| Forestside / Upper Galwally - District Centre | 64.0 | 37.5 | 101.6 | 11.3 | 90.3 | 4,997 | 18,065 |
| Castlereagh BC area - Other | 2.8 | 1.6 | 4.4 | 19.9 | -15.5 | 4,997 | -3,098 |
| Sub Total | 66.0 | 32.8 | 98.7 | 31.2 | 67.5 | - | 13,515 |
| **Lisburn BC area** | | | | | | | |
| Lisburn City Centre | 114.3 | 76.3 | 190.6 | 141.5 | 49.1 | 4,997 | 9,826 |
| Sprucefield - Regional Centre | 27.4 | 3.0 | 30.4 | 230.1 | -199.7 | 4,997 | -39,961 |
| Dairy Farm - District Centre | 0.5 | -0.1 | 0.4 | 0.0 | 0.4 | 4,997 | 82 |
| Hillsborough | 0.1 | -0.6 | -0.7 | 0.0 | -0.7 | 4,997 | -134 |
| Moira | 0.9 | -1.0 | -0.1 | 0.0 | -0.1 | 4,997 | -18 |
| Lisburn CC area - Other | 4.3 | -13.1 | -8.8 | 48.3 | -57.1 | 4,997 | -11,429 |
| Sub Total | 147.5 | 64.5 | 211.8 | 415.9 | -204.1 | - | -40,839 |
| **Newtownabbey BC area** | | | | | | | |
| Ballyclare Town Centre | 2.6 | -2.2 | 0.4 | 1.4 | -1.0 | 4,997 | -207 |
| Abbey Centre - District Centre | 69.9 | 0.7 | 70.6 | 168.3 | -97.7 | 4,997 | -19,544 |
| Glengormley Village | 3.9 | 0.8 | 4.7 | 0.6 | 4.1 | 4,997 | 818 |
| Northcott Centre - District Centre | -2.2 | -11.9 | -14.0 | 29.4 | -43.4 | 4,997 | -8,694 |
| Newtownabbey BC area - Other | -2.7 | -10.1 | -12.7 | 18.3 | -31.0 | 4,997 | -6,206 |
| Sub Total | 71.6 | -22.7 | 48.9 | 218.0 | -169.1 | - | -33,835 |
| **North Down BC area** | | | | | | | |
| Bangor Town Centre | 29.6 | 1.1 | 30.7 | 70.1 | -39.4 | 4,997 | -7,887 |
| Holywood Town Centre | -0.5 | -5.3 | -5.7 | 1.5 | -7.2 | 4,997 | -1,438 |
| Bloomfield - District Centre | 48.1 | 36.6 | 84.7 | 28.1 | 56.6 | 4,997 | 11,327 |
| Springhill - District Centre | 1.3 | -1.3 | -0.1 | 1.3 | -1.4 | 4,997 | -274 |
| North Down area - Other | 2.1 | -28.2 | -26.1 | 42.6 | -68.7 | 4,997 | -13,752 |
| Sub Total | 80.6 | 3.9 | 83.5 | 143.6 | -60.1 | - | -12,024 |
| **Total** | 798.5 | 280.5 | 1,079.0 | 1,954.1 | -875.1 | - | -175,121.5 |

Notes:
(1) Details and estimated turnovers of new comparison goods floorspace opening between 2002 and 2005 are set out in Appendix 3A, whilst details and turnovers of retail commitments and retail proposals are set out in Appendices 3B and 3C respectively.
(2) The derivation of our sales density estimates are set out in Section 4 (paragraphs 4.50 to 4.54 inclusive).

BELFAST METROPOLITAN AREA PLAN

RETAIL SECTOR STUDY: UPDATE

on behalf of

DEPARTMENT OF ENVIRONMENT, PLANNING SERVICE

APPENDIX 3

QUANTITATIVE NEED ASSESSMENT: CONVENIENCE GOODS

May 2006

**Table 8 : Calculation of Potential Convenience Goods 'Headroom' Expenditure, 2005 (£ million)**

| Centre | 2002 Turnover | 2005 Turnover Potential | Turnover Allocation for Existing Retailers 2002-2005 | Residual Turnover Potential by 2005 | Potential Headroom Expenditure by 2005 |
|---|---|---|---|---|---|
| | A *(from Table 6, Col C)* | B *(from Table 7)* | C *(see Note (1))* | D *(D = B - C)* | E *(E = D - A)* |
| **Within BMAP** | | | | | |
| **Belfast CC area** | | | | | |
| Belfast City Centre - Regional Centre | 47.8 | [illegible] | 1.2 | 48.3 | [illegible] |
| Connswater - District Centre | 44.7 | 46.4 | 1.0 | 45.3 | [illegible] |
| Kennedy Way - District Centre | 23.6 | 24.5 | 0.6 | 23.7 | 0.2 |
| Park Centre - District Centre | 33.2 | 34.9 | 0.6 | 33.8 | 0.4 |
| Westwood Centre - District Centre | 28.4 | 29.3 | 0.6 | 28.5 | 0.3 |
| Yorkgate - District Centre | 31.3 | 32.2 | 0.8 | 31.4 | 0.2 |
| Crumlin Road / Hillview (u/c) | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Belfast CC area - Other | 248.6 | 256.4 | 5.8 | 250.6 | 2.0 |
| Sub Total | 457.6 | 472.4 | 10.5 | 461.9 | 4.3 |
| **Carrickfergus BC area** | | | | | |
| Carrickfergus Town Centre | 54.0 | 56.1 | 1.2 | 54.9 | 0.5 |
| Carrickfergus BC area Other | 4.5 | 4.6 | 0.2 | 4.4 | -0.1 |
| Sub Total | 58.5 | 60.7 | 1.5 | 59.3 | 0.8 |
| **Castlereagh BC area** | | | | | |
| Carryduff Town Centre | 5.1 | 5.3 | 0.3 | 5.0 | -0.1 |
| Dundonald Village | 7.7 | 7.9 | 0.3 | 7.5 | -0.2 |
| Forestside / Upper Galwally - District Centre | 93.9 | 97.0 | 1.7 | 95.3 | 1.4 |
| Castlereagh BC area - Other | 21.1 | 21.5 | 0.6 | 20.9 | -0.2 |
| Sub Total | 117.9 | 121.7 | 3.1 | 118.7 | 0.8 |
| **Lisburn BC area** | | | | | |
| Lisburn City Centre | 23.9 | 24.7 | 0.8 | 23.8 | -0.1 |
| Sprucefield - Regional Centre | 22.7 | 23.5 | 0.4 | 23.0 | 0.4 |
| Dairy Farm - District Centre | 0.9 | 0.9 | 0.0 | 0.9 | 0.0 |
| Hillsborough | 1.8 | 1.9 | 0.0 | 1.8 | 0.0 |
| Moira | 7.5 | 7.8 | 0.2 | 7.6 | 0.1 |
| Lisburn CC area - Other | 114.0 | 118.1 | 2.5 | 115.6 | 1.6 |
| Sub Total | 170.7 | 176.9 | 4.2 | 172.7 | 2.1 |
| **Newtownabbey BC area** | | | | | |
| Ballyclare Town Centre | 15.8 | 16.1 | 0.3 | 15.8 | [illegible] |
| Abbey Centre - District Centre | 53.7 | 55.3 | 1.2 | 54.1 | 0.4 |
| Glengormley Village | 5.8 | 5.8 | 0.2 | 5.6 | -0.1 |
| Northcott [illegible] - District Centre | 17.1 | 17.6 | 0.4 | 17.2 | 0.1 |
| Newtownabbey BC area - Other | 46.1 | 47.5 | 0.7 | 46.8 | 0.7 |
| Sub Total | 137.8 | 142.5 | 3.0 | 139.6 | 1.7 |
| **North Down BC area** | | | | | |
| Bangor Town Centre | 7.0 | 7.2 | [illegible] | [illegible] | -0.4 |
| Holywood Town Centre | 7.3 | 7.5 | 0.2 | 7.2 | 0.0 |
| Bloomfield - District Centre | 107.4 | 110.9 | 1.7 | 109.1 | 1.7 |
| Springhill - District Centre | 4.0 | 4.1 | 0.3 | 3.8 | -0.1 |
| North Down area - Other | 8.9 | 9.2 | 0.6 | 8.6 | -0.3 |
| Sub Total | 134.6 | 138.9 | 3.5 | 135.4 | 0.8 |
| **Total** | 1,077.0 | 1,113.1 | 25.6 | 1,087.5 | 10.5 |

**Note:**

We assume that existing convenience goods floorspace at the base year (2002) will achieve a real sales productivity gain of 0.75% per annum. This figure is based on the latest published research by EBS (Appendix 2G). The store productivity gains are applied to the 2002 benchmark convenience goods turnover for each centre / retail category as set out in Table 6, Column G.

**Table 11 : Calculation of Potential Convenience Goods 'Headroom' Expenditure, 2010 (£ million)**

| Centre | 2002 Turnover | 2010 Turnover Potential | Turnover Allocation for Existing Retailers 2002-2010 | Residual Turnover Potential by 2010 | Potential Headroom Expenditure by 2010 |
|---|---|---|---|---|---|
| | A *(from Table 6 Col.C)* | B *(from Table 10)* | C *(see Note (1))* | D *(D = B - C)* | E *(E = D - A)* |
| **Within BMAP** | | | | | |
| **Belfast CC area** | | | | | |
| Belfast City Centre - Regional Centre | 47.8 | 51.1 | 3.4 | 47.0 | -0.8 |
| Connswater - District Centre | 44.7 | 47.8 | 2.8 | 45.0 | 0.3 |
| Kennedy Way - District Centre | 23.6 | 24.9 | 1.7 | 23.1 | -0.4 |
| Park Centre - District Centre | 33.2 | 35.1 | 1.8 | 33.3 | 0.1 |
| Westwood Centre - District Centre | 24.4 | 30.0 | 1.7 | 24.3 | -0.1 |
| Yorkgate - District Centre | 31.3 | 32.7 | 1.5 | 31.2 | -0.1 |
| Crumlin Road / Hillview (u/c) | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Belfast CC area - Other | 248.6 | 262.0 | 15.9 | 246.2 | -2.4 |
| Sub Total | 457.6 | 483.5 | 28.6 | 455.0 | -2.6 |
| **Carrickfergus BC area** | | | | | |
| Carrickfergus Town Centre | 54.0 | 58.0 | 3.3 | 54.7 | 0.7 |
| Carrickfergus BC area Other | 4.5 | 4.6 | 0.7 | 4.1 | -0.3 |
| Sub Total | 58.5 | 62.6 | 3.9 | 58.8 | 0.4 |
| **Castlereagh BC area** | | | | | |
| Carryduff Town Centre | 5.1 | 5.4 | 0.9 | 4.5 | -0.6 |
| Dundonald Village | 7.7 | 8.1 | 1.3 | 6.9 | -0.8 |
| Forestside / Upper Galwally - District Centre | 93.9 | 99.3 | 4.5 | 94.8 | 0.9 |
| Castlereagh BC area - Other | 11.3 | 11.8 | 1.5 | 10.3 | -0.9 |
| Sub Total | 117.9 | 124.7 | 8.3 | 116.4 | -1.5 |
| **Lisburn BC area** | | | | | |
| Lisburn City Centre | 23.9 | 25.5 | 2.6 | 22.9 | -1.0 |
| Sprucefield - Regional Centre | 22.7 | 24.2 | 1.1 | 23.1 | 0.4 |
| Dairy Farm - District Centre | 8.9 | 8.9 | 0.1 | 8.8 | 0.0 |
| Hillsborough | 1.8 | 1.9 | 0.1 | 1.8 | 0.0 |
| Moira | 7.5 | 8.1 | 0.6 | 7.5 | 0.0 |
| Lisburn CC area - Other | 114.0 | 121.7 | 6.9 | 114.8 | 0.8 |
| Sub Total | 170.7 | 182.4 | 11.4 | 171.0 | 0.3 |
| **Newtownabbey BC area** | | | | | |
| Ballyclare Town Centre | 15.8 | 17.8 | 0.8 | 17.0 | 1.1 |
| Abbey Centre - District Centre | 53.7 | 56.5 | 3.4 | 53.1 | -0.5 |
| Glengormley Village | 5.1 | 5.4 | 0.6 | 4.8 | -0.4 |
| Northcott Centre - District Centre | 17.3 | 18.0 | 1.2 | 16.8 | -0.5 |
| Newtownabbey BC area - Other | 46.1 | 48.6 | 2.0 | 46.5 | 0.4 |
| Sub Total | 137.8 | 146.3 | 8.0 | 138.2 | 0.4 |
| **North Down BC area** | | | | | |
| Bangor Town Centre | 7.0 | 7.4 | 1.8 | 5.6 | -1.4 |
| Holywood Town Centre | 7.1 | 7.6 | 0.6 | 7.0 | -0.1 |
| Bloomfield - District Centre | 107.4 | 113.4 | 4.7 | 108.7 | 1.3 |
| Springhill - District Centre | 4.0 | 4.2 | 0.7 | 3.5 | -0.5 |
| North Down area - Other | 8.9 | 9.4 | 1.6 | 7.8 | -1.1 |
| Sub Total | 134.6 | 142.0 | 9.4 | 132.5 | -2.0 |
| **Total** | 1,077.0 | 1,141.6 | 69.7 | 1,071.9 | -5.1 |

Note:

We assume that existing convenience goods floorspace at the base year (2002) will achieve a real sales productivity gain of 0.75% per annum. This figure is based on the latest published research by EBS (Appendix 2G). The store productivity gains are applied to the 2002 benchmark convenience goods turnover for each centre / retail category as set out in Table 6, Column G.

**Table 14 : Calculation of Potential Convenience Goods 'Headroom' Expenditure, 2015 (£ million)**

| Centre | 2002 Turnover | 2015 Turnover Potential | Turnover Allocation for Existing Retailers 2002-2015 | Residual Turnover Potential by 2015 | Potential Headroom Expenditure by 2015 |
|---|---|---|---|---|---|
| | A *[from Table 6 Col.C]* | B *[from Table 13]* | C *[see Note (*)]* | D *[D = B - C]* | E *[E = D - A]* |
| **Within BMAP** | | | | | |
| **Belfast CC area** | | | | | |
| Belfast City Centre - Regional Centre | 47.8 | 55.0 | 5.6 | 49.4 | 1.6 |
| Connswater - District Centre | 44.7 | 51.4 | 4.6 | 46.7 | 2.0 |
| Kennedy Way - District Centre | 23.6 | 26.5 | 2.9 | 23.7 | 0.1 |
| Park Centre - District Centre | 33.2 | 37.4 | 2.9 | 34.5 | 1.3 |
| Westwood Centre - District Centre | 28.4 | 32.0 | 2.7 | 29.2 | 0.8 |
| Yorkgate - District Centre | 31.3 | 34.7 | 2.5 | 32.2 | 0.9 |
| Crumlin Road / Hillview (u/c) | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Belfast CC area - Other | 248.6 | 279.1 | 26.0 | 253.0 | 4.4 |
| Sub Total | 457.6 | 516.0 | 47.3 | 468.7 | 11.1 |
| **Carrickfergus BC area** | | | | | |
| Carrickfergus Town Centre | 54.0 | 62.4 | 5.4 | 57.0 | 3.0 |
| Carrickfergus BC area Other | 4.5 | 5.2 | 1.1 | 4.1 | -0.4 |
| Sub Total | 58.5 | 67.6 | 6.5 | 61.1 | 2.6 |
| **Castlereagh BC area** | | | | | |
| Carryduff Town Centre | 5.1 | 5.8 | 1.6 | 4.2 | -0.9 |
| Dundonald Village | 7.7 | 8.7 | 2.1 | 6.6 | -1.1 |
| Forestside / Upper Galwally - District Centre | 93.9 | 106.0 | 7.5 | 98.5 | 4.6 |
| Castlereagh BC area - Other | 11.2 | 12.6 | 2.6 | 10.1 | -1.1 |
| Sub Total | 117.9 | 133.2 | 13.8 | 119.4 | 1.5 |
| **Lisburn BC area** | | | | | |
| Lisburn City Centre | 23.9 | 27.1 | 4.2 | 23.1 | -0.8 |
| Sprucefield - Regional Centre | 22.7 | 26.0 | 1.9 | 24.1 | 1.4 |
| Dairy Farm - District Centre | 0.9 | 1.0 | 0.1 | 0.9 | 0.0 |
| Hillsborough | 1.8 | 2.1 | 0.2 | 1.9 | 0.1 |
| Moira | 7.5 | 8.8 | 1.0 | 7.8 | 0.3 |
| Lisburn CC area - Other | 114.0 | 130.7 | 11.4 | 119.3 | 5.3 |
| Sub Total | 170.7 | 195.9 | 18.9 | 177.0 | 6.3 |
| **Newtownabbey BC area** | | | | | |
| Ballyclare Town Centre | 15.8 | 19.7 | 1.4 | 18.3 | 2.5 |
| Abbey Centre - District Centre | 53.7 | 60.2 | 5.6 | 54.6 | 0.9 |
| Glengormley Village | 5.1 | 5.7 | 1.0 | 4.7 | -0.4 |
| Northcott Centre - District Centre | 17.1 | 19.1 | 1.9 | 17.2 | 0.1 |
| Newtownabbey BC area - Other | 46.1 | 51.7 | 3.3 | 48.4 | 2.3 |
| Sub Total | 137.8 | 156.5 | 13.3 | 143.2 | 5.4 |
| **North Down BC area** | | | | | |
| Bangor Town Centre | 7.0 | 7.9 | 3.0 | 4.9 | -2.1 |
| Holywood Town Centre | 7.3 | 8.1 | 1.0 | 7.1 | -0.2 |
| Bloomfield - District Centre | 107.4 | 120.9 | 7.7 | 113.2 | 5.8 |
| Springhill - District Centre | 4.0 | 4.5 | 1.2 | 3.3 | -0.7 |
| North Down area - Other | 8.9 | 10.0 | 2.7 | 7.3 | -1.6 |
| Sub Total | 134.6 | 151.4 | 15.6 | 135.8 | 1.2 |
| **Total** | 1,077.0 | 1,220.5 | 115.4 | 1,105.1 | 28.1 |

Note:

We assume that existing convenience goods floorspace at the base year (2002) will achieve a real sales productivity gain of 0.75% per annum. This figure is based on the latest published research by EBS (Appendix 2G). The store productivity gains are applied to the 2002 benchmark convenience goods turnover for each centre / retail category as set out in Table 6, Column G.

**Table 17 : Calculation of Residual Headroom Expenditure and Retail Floorspace Need by Centre (Including Soft Proposals), 2015**

| Centre | Potential Headroom Expenditure by 2015 (£m) | Adjustment for Over/Under Trading in Base Year (£m) | Adjusted Headroom Expenditure by 2015 (£m) | Reduction in Expenditure due to Convenience Goods Floorspace Opening for Trading, 2002-05, Retail Commitments and Retail Proposals [1] (£m) | Adjusted Residual Headroom Expenditure by 2015 (£m) | Assumed Sales Density in 2015 [2] (£ per sq m) | Estimated Retail Floorspace Need in 2015 (Sq M Net) |
|---|---|---|---|---|---|---|---|
| | A | B | C | D | E | F | G |
| | [ From Table 14 Col. E ] | [ From Table 6 Col. H ] | [ C = A + B ] | | [ E = C - D ] | | [ G = E / F ] |
| **Within BMAP** | | | | | | | |
| **Belfast CC area** | | | | | | | |
| Belfast City Centre - Regional Centre | 1.6 | -7.0 | -5.4 | 0.0 | -5.4 | 9,159 | -588 |
| Connswater - District Centre | 2.0 | -0.7 | 1.4 | 0.0 | 1.4 | 9,159 | 148 |
| Kennedy Way - District Centre | 0.1 | -4.4 | -4.3 | 0.0 | -4.3 | 9,159 | -466 |
| Park Centre - District Centre | 1.3 | 4.6 | 5.9 | 0.0 | 5.9 | 9,159 | 642 |
| Westwood Centre - District Centre | 0.8 | 1.5 | 2.3 | 5.6 | -3.3 | 9,159 | -360 |
| Yorkgate - District Centre | 0.9 | 6.7 | 7.7 | 0.0 | 7.7 | 9,159 | 836 |
| Cromac Road / Hillview (n/c) | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 9,159 | 0 |
| Belfast CC area - Other | 4.4 | -6.7 | -2.3 | 150.2 | -152.5 | 9,159 | -16,650 |
| Sub Total | 10.1 | -4.1 | 5.0 | 155.8 | -150.8 | - | -16,468 |
| **Carrickfergus BC area** | | | | | | | |
| Carrickfergus Town Centre | 3.6 | 0.3 | 3.7 | 0.0 | 3.7 | 9,159 | 405 |
| Carrickfergus BC area Other | -0.4 | -6.2 | -6.6 | 7.6 | -14.2 | 9,159 | -1,552 |
| Sub Total | 2.6 | -5.5 | -2.9 | 7.6 | -10.5 | - | -1,147 |
| **Castlereagh BC area** | | | | | | | |
| Carryduff Town Centre | -0.9 | -10.1 | -11.0 | 0.0 | -11.0 | 9,159 | -1,204 |
| Dundonald Village | -1.1 | -15.3 | -16.3 | 2.6 | [illegible] | 9,159 | [illegible] |
| Forestside / Upper Galwally - District Centre | 4.6 | 20.1 | 24.7 | 0.0 | 24.7 | 9,159 | 2,692 |
| Castlereagh BC area - Other | -1.1 | -13.9 | -15.0 | 61.9 | -76.9 | 9,159 | -8,396 |
| Sub Total | 1.5 | -17.3 | -19.7 | 64.7 | -80.4 | - | -8,779 |
| **Lisburn BC area** | | | | | | | |
| Lisburn City Centre | 0.8 | -17.5 | -18.4 | 0.0 | -18.4 | 9,159 | -2,006 |
| Sprucefield - Regional Centre | 1.4 | 4.0 | 5.4 | 35.1 | -29.7 | 9,159 | [illegible] |
| Dairy Farm - District Centre | 0.0 | -0.2 | -0.2 | 0.0 | -0.2 | 9,159 | -26 |
| Hillsborough | 0.1 | -0.1 | 0.0 | 0.0 | 0.0 | 9,159 | 5 |
| Moira | 0.2 | -2.1 | -1.9 | 0.0 | -1.9 | 9,159 | -206 |
| Lisburn CC area - Other | 5.3 | 1.9 | 7.1 | 99.2 | -92.1 | 9,159 | -10,051 |
| Sub Total | 6.5 | -14.3 | -7.9 | 154.3 | -162.2 | - | -17,786 |
| **Newtownabbey BC area** | | | | | | | |
| Ballyclare Town Centre | 2.5 | 2.1 | 4.6 | 39.8 | -35.2 | 9,159 | -3,841 |
| Abbey Centre - District Centre | 3.0 | -1.2 | -0.2 | 33.6 | -33.8 | 9,159 | -3,678 |
| Glengormley Village | -0.4 | -5.1 | -5.6 | 0.0 | -5.6 | 9,159 | -606 |
| Northcott Centre - District Centre | 0.0 | -1.8 | 1.8 | 0.4 | -2.2 | 9,159 | -236 |
| Newtownabbey BC area - Other | 2.1 | 13.2 | 15.5 | 0.0 | 15.5 | 9,159 | 1,697 |
| Sub Total | 5.4 | 7.5 | 12.7 | 93.8 | -81.1 | - | -8,859 |
| **North Down BC area** | | | | | | | |
| Bangor Town Centre | -2.1 | -22.5 | -24.6 | 29.5 | -54.2 | 9,159 | -5,908 |
| Holywood Town Centre | -0.2 | -2.8 | -3.1 | 0.0 | -3.1 | 9,159 | -335 |
| Bloomfield - District Centre | 5.8 | 31.8 | 37.6 | 9.4 | 28.2 | 9,159 | 3,081 |
| Springhill - District Centre | -0.7 | -7.5 | -8.2 | 0.0 | -8.2 | 9,159 | -893 |
| North Down area - Other | -1.6 | -17.5 | -19.2 | 18.4 | -37.6 | 9,159 | [illegible] |
| Sub Total | 1.2 | -18.6 | -17.5 | 57.3 | -74.8 | - | -8,162 |
| **Total** | 28.1 | -54.4 | -26.3 | 533.5 | -559.8 | - | -61,121.0 |

Notes:
(1) Details and estimated turnovers of new convenience goods floorspace opening between 2002 and 2005 are set out in Appendix 3A, whilst details and turnover of retail commitments and retail proposals are set out in Appendices 3B and 3C respectively.
(2) We assume an average sales density of £9,159 per sq m. The derivation of this estimate is set out in Section 4 (paragraphs 4.50 to 4.54 inclusive).