Lisburn & Castlereagh City Council

Local Development Plan

Technical Supplement 5: Retail Capacity Study

October 2019

Contents

1.0 INTRODUCTION

Purpose and Background

1.1 This Technical Supplement provides details of the evidence base used to inform the preparation of the Lisburn & Castlereagh City Council draft Plan Strategy for the period 2017 -2032. It is one of a suite of topic based Technical Supplements that should be read alongside the Local Development Plan (LDP) and which sets out the rationale and justification for the strategic policies, allocations and proposals within the draft Plan Strategy.

1.2 It builds upon the suite of 14 thematic Position Papers prepared and published alongside the Preferred Options Paper (POP), which established the baseline position and identified the key issues that need to be addressed by the LDP.

1.3 The evidence base has been informed through an independent evidence-based Retail Capacity study undertaken by professional consultants. The details of these reports were presented to Members during preparation of the policy for the draft Plan Strategy.

1.4 The retail capacity study was accompanied by health checks for Lisburn City Centre and other selected town centres. The main purpose of the research was to inform the emerging Local Development Plan (LDP), by providing forecasts of spare retail expenditure capacity and provide a sound policy base for future planning decisions. The key requirements of the study were to:-

- Inform the Council's Preferred Options on retailing and town centres: Option 11A: Extend the existing City Centre Boundary to include the Lisburn Leisure Park; Option 12A: Retain the existing town centre of Carryduff and designate town centre boundaries in Hillsborough and Moira; Option 13A: Retain and reinforce Sprucefield as a Regional Shopping Centre; Option 14A: Extend District and Local Centre Boundaries at Forestside and Dundonald.
- Help the Council to identify issues for growing the night time economy;
- Provide forecasts on spare retail capacity;
- Carry out Town Centre Health Checks with key performance indicators to provide guidance for the emerging LDP on relevant issues and opportunities for each town which future policies need to address.

1.5 It is widely acknowledged that the high street faces many challenges including in some areas an increase in vacancy rates and decline of the primary retail frontage, changing consumer patterns including online shopping, parking issues, rates, increased traffic/pollution and the problems with mobility for children and the elderly in an urban environment.

1.6 Retail market trends indicate a current trend in demand among the major national multiples to concentrate most of their requirements in the largest centres, including regional shopping centres. Investment is smaller but major centres such as Lisburn is successful where retail rents and other factors retain the multiple representation. Multiple retailers generally have their preferred unit formats. Often these cannot easily be satisfied in traditional town centres where unit sizes are commonly smaller or not ideally configured for their needs. This has generated market interest in retail parks in cases where there are possibilities of securing consents for a wide range of goods.

1.7 The contribution of independent retailers is becoming ever more important to town centres as the proportion of multiples declines in smaller towns. Non-retail services, including restaurants, leisure and personal services usually account for a high proportion of occupiers in town centres generally. Among the greatest changes in recent years is the expansion of online shopping. Many successful retailers operate multi-channel sales services, both internet and counter sales. Widespread shop closures on high streets generally are evidence of changing habits among shoppers.

2.0 POLICY CONTEXT

Regional Policy Context

2.1 The regional policy context is provided by the Regional Development Strategy (RDS) 2035, the Strategic Planning Policy Statement (SPPS) 2015 and regional Planning Policy Statements (PPS). The latter are subject to the transitional arrangements set out in paragraphs 1.10-1.16 of the SPPS, which states that existing policy retained under the transitional arrangements will cease to have effect where a Council adopts its Plan Strategy.

Regional Development Strategy (RDS) 2035

2.2 The RDS prepared under the Strategic Planning (Northern Ireland) Order 1999 by the Department for Regional Development (published 15th March 2012) is the spatial strategy for the Executive and provides an overarching strategic planning framework to facilitate and guide the public and private sectors. The RDS emphasises the importance of the relationship between the location of housing, jobs, facilities, services and infrastructure and must be taken into account when preparing a local development plan.

2.3 The RDS provides strategic guidance through Regional Guidance (RG) and Spatial Framework Guidance (SFG) under the 3 sustainable development themes of the Economy, Society and Environment.

2.4 Under the Spatial Framework Guidance Lisburn sits under the Metropolitan Area. The urban area of Lisburn benefits from its location at the meeting point of the Belfast/Dublin economic corridor and the East/West transport corridor. Lisburn has a vibrant city centre with a strong focus on leisure provision, sports and the arts. Potential exists to grow the retail and high quality office offer through the creation of employment in business services. Potential also exists to generate a new driver for the night-time economy and to provide a range of flexible commercial accommodation and business parks at development locations such as Blaris and the Maze/Long Kesh. Regeneration is necessary to create more accessible, vibrant city and town centres which offer more local choice for shopping, social activity and recreation.

2.5 Strategic Guidance Framework (SFG) 1 specifically recognises Lisburn City as a major employment and commercial centre. Projections suggest that between 2008 and 2028 Lisburn Council Area will account for nearly 10% of the total increase in employment. Lisburn has a vibrant city centre with a strong focus on retail provision.

2.6 It is further confirmed at bullet point two of paragraph 3.41 of the RDS it is stated that Sprucefield will continue to retain its status as a regional out-of-town shopping centre.

2.7 There is no definition of what a regional out of town shopping centre is in the RDS albeit at the date of publication PPS 5: Retailing and Town Centres was the prevailing regional policy and Sprucefield was referred at page 15:

- ‘Northern Ireland has one purpose-built out-of-town regional shopping centre at Sprucefield.

This occupies a unique geographical location and serves a wide catchment area.'

2.8 The equivalent policy document published at this time for England was PPS6: Planning for Town Centres which did include at Annex A: Typologies Table 3: Descriptions of Types of Development a definition of a regional out of town shopping centres as:

- 'generally over 50,000 square metres gross retail area, typically comprising a wide variety of comparison goods stores.'

2.9 In advance of the publication of the SPPS the Department for the Environment for Northern Ireland commissioned a team of consultants led by GL Hearn to prepare a research paper on town centres and retailing.
There are a number of references to Sprucefield in this document at paragraphs 2.3.19 and 3.7:

- 'Sprucefield is identified as the only out-of-town regional shopping centre but there is considered to be 'no justifiable need for any new regional out-of-town shopping centres in Northern Ireland.'
- 'Whilst some retail parks are dominated by bulky goods retailers, this is not exclusively the case. Sprucefield, Showgrounds in Omagh, Lisnagelvin in Londonderry and Boucher Retail Park and Park Centre in Belfast include a wide range of core comparison, particularly clothing retailers.'
- 'Sprucefield, although not similar to regional shopping centres in the rest of the UK such as Bluewater, Meadowhall, Lakeside or Braehead in its form of development, comprising an agglomeration of large unit retail parks, is acknowledged to be the only floor space capable of exerting a regional attraction by virtue of its location and M&S as an anchor tenant.'

2.10 A number of common themes are extracted from these documents specific and relevant to understanding the role and status of Sprucefield as a regional out-of-town shopping centre in that it occupies a unique geographical location capable of exerting a regional attraction and serving a wide catchment. Typically in the context of English policy these centres will have been comprised of more than 50,000 square metres.

2.11 Sprucefield will continue to retain its status as a regional out-of -town shopping centre.

Strategic Planning Policy Statement (SPPS) 'Planning for Sustainable Development'

2.12 The Department of the Environment's 'Strategic Planning Policy Statement for Northern Ireland' - Planning for Sustainable Development (SPPS), was published in final form on September 2015.

2.13 The purpose of the SPPS is to promote sustainable development through the integration and balancing of economic, social and environmental factors. This document describes facilitating economic growth through large scale investment and job creation by improving competitiveness and building a larger and more export driven private sector. It also aims to promote well-being and a shared society through delivery of homes, investment in physical regeneration and promoting good design in the built environment.

2.14 In relation to retailing, the aim is to support and sustain vibrant city and town centres as the appropriate first choice location of retailing and other complementary functions.

2.15 A number of strategic objectives for town centres are to:

- Secure a town centres first approach for the location of future retailing and other main town centre uses (includes cultural, community facilities, retail, leisure, entertainment and businesses)

- Adopt a sequential approach to the identification of retail and main town centre uses in LDPs (primary retail core, town centres, edge of centre and then out of centre only where sites are accessible by a choice of good public transport modes)
- 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 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.

2.16 The SPPS sets out Regional Strategic Policy including that LDPs should define the hierarchy of centres – town, district and local centres and also identify 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 it clear which uses will be permitted in the retail hierarchy; provide for a diverse offer and mix of uses and; allocate a range of suitable sites to meet the scale and form of retail, and other town centre uses.

2.17 Policies and proposals for shops in villages and small settlements must be consistent with the policy approach for town centres, meet local need and be of an appropriate scale and design appropriate.

2.18 The SPPS also states that retail facilities in the countryside must be resisted with the exception of farm shops, craft shops and shops serving tourist or recreational facilities. These will be located within existing buildings.

2.19 All applications for retail or town centre type developments above a threshold of 1000 square metres which are not proposed in a town centre location should be required to undertake a full assessment of retail impact as well as need.

2.20 The SPPS is silent on Sprucefield Regional Shopping Centre. There is no reference to the GL Hearn report and whether this was used in the construct of the regional policy that replaced PPS 5: Retailing and Town Centres.

2.21 In the absence of any regional policy direction consistent with the RDS the Council has considered other references to what a regional out-of-town shopping centres are normally comprised of to see whether the anything is changed from the general themes of PPS5 and PPS6 and the GL Hearn research paper.

Co-Star define:

- Large, dominant regional shopping centres in out of town locations as covering a large catchment and which are the leading shopping destinations for those with cars. Generally over 500,000 square feet Bluewater.

2.22 The Valuations Office Agency in England and Wales describe in the Ratings Manual at Section 6, Part 3, Section 925: regional out of town shopping centres and city centre shopping malls (5 May 2017):

- Regional out of town shopping centres are generally characterised by excellent transport links, extensive, often free car parking and a substantial retail and leisure offer.

2.23 Reference is made in the GL Hearn report to the Sprucefield not being like other regional out-of-town shopping centres but do not explain why it is differentiated from other comparative examples. Sprucefield Park & Centre is comprised of approximately 65,000 square metres of floor space, selling mainly comparison goods, at the intersection of the A1/M1 junction with at least one major retailer with a regional draw and serving a different catchment to the City Centre of Lisburn.

2.24 In relation to other locations referenced:

- Bluewater Kent is comprised of approximately 170,000 square metres of floor space
- Lakeside Essex is comprised of approximately 150,000 square metres of floor space
- Meadowhall Sheffield is comprised of approximately 140,000 square metres of floor space
- Braehead Glasgow is comprised of approximately 105,000 square metres of floor space

2.25 Having examined the details of the above sites, all centres are at major motorway junctions and comprised of more than 50,000 square metres of floor space. They offer mainly comparison goods and have leisure associated in the form for example of cinemas, bowling, indoor play and indoor skiing.

2.26 The main distinguishable factor between these regional out-of-town shopping and Sprucefield is that these centres also comprise shopping malls with one or more anchor tenants. The retail capacity study addresses the capacity of Sprucefield to grow as a regional out-of-town shopping centre as a retail and leisure destination.

Local Policy Context

2.27 The current planning policy context at a local level is complex as a result of a successful legal challenge to the adoption of the Belfast Metropolitan Area Plan (BMAP) 2015. There are therefore five existing development plans that relate to parts of the Lisburn & Castlereagh Council district, alongside draft BMAP (published in 2004) and post-inquiry BMAP (published in 2014). The SPPS's transitional arrangements provide for continuity until such times as a new LDP for the whole of the council area is adopted to ensure continuity in planning policy for taking planning decisions.

Draft Belfast Metropolitan Area Plan 2015 (BMAP)

2.28 Although formally adopted in 2014, this process of final BMAP adoption was declared unlawful as a result of a judgement in the court of appeal delivered on 18 May 2017. This means the Belfast Urban Area Plan (BUAP) 2001, Lisburn Area Plan 2001 and the other Development Plans provides the statutory plan context for the area.

2.29 Draft BMAP, in its most recent, post-examination form remains a significant material consideration in future planning decisions. It was at the most advanced stage possible prior to formal adoption. Draft BMAP referred to throughout this document therefore refers to that version. However, in preparing this document the council has also had regard to the provisions of the draft BMAP which was published in 2004, the objections which were raised as part of the plan process and the Planning Appeals Commission Inquiry report. The SPPS's transitional arrangements provide for continuity until such times as a new LDP for the whole of the council area is adopted to ensure continuity in planning policy for taking planning decisions.

2.30 The BMA Retail Strategy promotes Lisburn City Centre and Carryduff as the main foci for additional retail capacity outside of Belfast (as the leading shopping centre in NI). The Retail Strategy also states that outside City and Town Centres the nature and scale of retail development is to be controlled in order to protect the vitality and viability of these centres. Retail development can also be focused on designated District and Local Centres. The Retail Strategy also states that expansion of Sprucefield Regional Shopping Centre should be for bulky goods only.

Within Lisburn city centre, draft BMAP sets out the following:-

- Designation of a city centre boundary
- Designation of a primary retail core and primary retail frontage

2.31 The Strategy also designates Forestside as a District Centre and refers the reader to Regional Planning Policy. In this case PPS 5 Retailing & Town Centres has been replaced by the SPPS 2015. The Strategy identifies Dundonald as a Local Centre with restrictions on the size of comparison and convenience retailing.

2.32 Hillsborough and Moira each have a settlement development limit in draft BMAP, but no defined town centres at present.

Belfast Urban Area Plan (BUAP) 2001

2.33 The current development plan for the majority of the Belfast district is the Belfast Urban Area Plan (BUAP) 2001, which was adopted in December 1989. The area covered by the plan included the whole of the administrative area of the former Belfast City Council area, together with the urban parts of the former district council areas of Castlereagh, Lisburn and Newtownabbey as well as Greenisland and Holywood.

2.34 The purpose of the BUAP was to establish physical development policies for this broad urban area up to 2001, clarifying the extent and location of development and providing a framework for public and private agencies in their investment decisions relating to land use. Although alterations were made in 1996, the BUAP is now largely out-of-date and was formally superseded by the BMAP in September 2014. However, as BMAP was quashed as a result of a judgement in the court of appeal delivered on 18 May 2017, meaning that the BUAP 2001 remains a statutory development plan.

The Lisburn Area Plan 2001

2.35 The change in council boundary as a result of the local government reform on 1 April 2015, and the subsequent quashing of BMAP, means that the Lisburn Area Plan 2001 remains a statutory development plan. Adopted on 4 July 2001, the Lisburn Area Plan sought to establish physical development policies for Lisburn and its surroundings up to 2001. The plan states that the vitality and viability of Lisburn Town Centre will be sustained and enhanced. Retail development throughout the Plan area will be controlled in accordance with all prevailing planning policy. Sprucefield shopping centre is located outside the settlement/development limit in this Area Plan.

Lisburn Town Centre Plan

2.36 No final version of adopted Town Centre Plan was published. The adopted Plan therefore comprises the provisions of the Draft Plan as approved and amended by the Adoption Statement. Please note, in this instance, there were no changes to the provisions of the Draft Plan.

Lagan Valley Regional Park Local Plan 2005

2.37 The quashing of BMAP also means that the Lagan Valley Regional Park Local Plan (adopted in 1993) remains the statutory development plan for the Lagan Valley Regional Park (LVRP). It sets out the strategy and policies associated with the protection and enhancement of the natural and man-made heritage of the LVRP. Its main objectives are to conserve the landscape quality and features of the Lagan Valley and to enhance recreational use for the public.

Carryduff Local Plan 1988-1993

2.38 No final version of the adopted Plan was published. The adopted Plan therefore comprises the provisions of the Draft Plan as approved and amended by the Adoption Statement. A composite Proposals Map and schedule for Carryduff was subsequently produced.

Lisburn & Castlereagh Community Plan

2.39 The Council took on responsibility for community planning in 2015 as a result of local government reform. Community Planning is enshrined in the Local Government Act (Northern Ireland) 2014 and places a duty on the Council along with a number of named partners to identify long-term objectives for improving the social, economic and environmental well-being of the district and the achievement of sustainable development while promoting equality of opportunity and good relations and tackling poverty, social exclusion and patterns of deprivation. The plan sets out a joint vision and long-term ambitions for the future, as well as outlining priorities for action.

2.40 The vision for Lisburn & Castlereagh is 'An empowered, prosperous, healthy, safe and inclusive community'.

2.41 Delivery of this vision is based on a number of strategic outcomes. Councils must take account of their current Community Plan when preparing a Local Development Plan (LDP). The Community Plan include the supporting outcomes including that everyone benefits from a vibrant economy, that neighbourhoods are designed and regenerated to promote well-being, we have access to essential services, shops, leisure and workplaces and there is a modal shift to sustainable and healthy transport options.

2.42 The LDP will provide a spatial expression to the community plan, thereby linking public and private sector investment through the land use planning system.

Other Non-Statutory Plans

Lisburn City Centre Master Plan Review -

2.43 This sets out the revised updated vision and objectives, new spatial framework and details key projects and initiatives following on from the Lisburn City Masterplan that was published in 2010.

The vision is to attract a strong City Centre population attracted by the jobs, leisure offer, heritage value and connectivity to Belfast.

Nine regeneration objectives have been identified:

- To continue to revitalise Market Square as the heart of the city
- To attract diverse and high quality development at key strategic sites and reinforce the gateways to the city centre
- To utilise public sector assets as opportunities to promote regeneration
- To reinforce the core retail function of Lisburn City Centre
- To improve the leisure, visitor and evening economy
- To encourage commercial office development in the city centre
- To connect the city centre with the Lagan Corridor
- To improve connectivity throughout the city centre
- To encourage city centre living

2.44 A number of key opportunity sites are identified including Laganbank Quarter, Smithfield Square, Jordan's Mill/Antrim Street, Castle Street and Lisburn Leisure Park. There is also scope to provide public realm improvements with pedestrian routes and better linkages, tree planting, events space, street furniture and lighting. Unlocking the potential of the river lagan towpath is also high on the agenda as is the drive for an evening economy in the city centre.

Draft Lisburn & Castlereagh Investment Strategy 2019

2.45 The Council's Investment Plan Proposition document sets out an ambitious vision to Connect, Invest and Transform Lisburn Castlereagh over the next 10 years with an investment fund in the region of £250 million. This includes the council's Capital Investment Programme and supplemented through existing funding streams such as Belfast Region City Deal. This includes Investing in our Community, Investing in Capital and Infrastructure and also investing in our Local Economy.

The West Lisburn Development Framework

2.46 This is a Council-led framework which aims to grow Lisburn City, both in terms of size and population, to the west/southwest by facilitating economic and residential development, increased employment opportunities and new key infrastructure such as the Knockmore Link Road. The framework will act as a catalyst for wider regeneration and growth in Lisburn City as a whole.

Draft Car Parking Strategy & Action Plan

2.47 AECOM have been appointed by Lisburn and Castlereagh City Council (LCCC) to develop an off street car parking strategy which will apply throughout the Council area, but will have a particular focus upon Lisburn City as well as Moira, Hillsborough, Carryduff and Dundonald. The purpose of the Parking Strategy is to address the overall requirement for car parking in the Council area in terms of availability, accessibility and convenience. The study is split into four stages:

- Stage 1 – Baseline Review
- Stage 2 – Current Issues, Challenges and Trends
- Stage 3 – Study of Future Developments; and
- Stage 4 – Parking Strategy and Action Plan.

3.0 KEY FINDINGS – POSITION PAPER 4 RETAILING AND TOWN CENTRES

3.1 A summary of the key findings are as follows:-

- Further opportunity exists to develop Lisburn as a major employment, retailing and commercial centre;

- The dominance of roads infrastructure and traffic in the centre of Lisburn City and the resulting severance caused will require further consideration along with public transportation infrastructure and linkages to/from the main shopping areas;

- The existence of gap sites and underdeveloped backland areas behind principal streets and lack of residential development in the City Centre have an impact on the night-time economy;

- Lisburn Historic Quarter as identified in the Council's Masterplan provides a high quality setting and potential for attracting further investment to boost the tourism/retailing offering, with potential for a centrally located hotel which would assist in developing the night-time economy;

- Areas such as Market Square and Bridge Street and Lisburn Square are showing signs of retail vacancy and 'to let' property. Footfall drops quite dramatically after 5pm affecting development of the night-time economy;

- Lisburn Historic Quarter has been the subject of a successful Townscape Heritage Initiative which has primed the process of bringing historic buildings back into use. The £4.3m refurbishment of Castle Gardens has also made a significant contribution to the City Centre, and is accessible for all to enjoy. Market Square underwent public realm improvements in line with the Lisburn City Centre Masterplan which will provide a high quality setting and potential for attracting further private investment nearby.

- The City Centre benefits from a wide range of independent stores but is under represented in terms of high street multiple retailers.

- Historically, the City Centre has suffered from a lack of modern office accommodation to attract business. Most cultural/leisure facilities are located outside the ring road and the lack of a centrally located hotel is also a major barrier to development of the City Centre evening economy. Recently two hotel developments have been approved. A proposed Apart-hotel comprising 70 bedrooms and 60 suites, associated parking and proposed road improvements to Governors Road at Lisburn Leisure Park. Part of Lisburn Square also has a planning approval for a change of use to a hotel.

- The River Lagan is an important feature of the City Centre and is connected to Castle Gardens via an existing underpass under the busy ring road. Many people are not aware of the close proximity of the river to the City Centre. There is an opportunity to attract the public to make more use of the waterfront which would be an attractive setting for riverside development.

- Opportunity also exists to redevelop Carryduff Town Centre, facilitate regeneration and address design issues. Planning permission was granted for the demolition of existing buildings at Carryduff Shopping Centre and construction of 2514 m2 retail sales area, 185 m2 office units and apartments.

4.0 EXECUTIVE SUMMARY OF RETAIL CAPACITY STUDY

4.1 Ove Arup & Partners Ltd in association with Roderick MacLean Associates Ltd were appointed by Lisburn & Castlereagh City Council to undertake a retail capacity study and town centre health checks to inform the Council of future retail need and demand, and provide an evidence base for the LDP. The retail study was carried out in conjunction with other studies into areas such as housing, employment, offices etc. as detailed in Technical Supplements 1-8.

The Research

4.2 The research is comprised of two documents:-

A. The Retail Capacity Study – containing forecasts of spare retail expenditure capacity which could support new retail development in Lisburn and the rest of the Council area;

B. Town Centre Health Checks – for Lisburn City Centre and the town centres of Dundonald, Carryduff, Hillsborough & Culcavy and Moira.

Retail Capacity Study

4.3 **Interview Surveys**

Two interview surveys were undertaken as part of the research

A. A Household Survey – carried out over the telephone to identify the shopping patterns of residents and to collect perceptions of the town centres for the health checks.

B. On-Street interview surveys – These were conducted in Lisburn City Centre and Sprucefield Shopping Centre to identify the proportion of shoppers coming from outside the Council area and their contribution to the turnover of the centres (expenditure inflows).

Retail Catchment Areas and population

4.4 Household survey zones and three catchment areas (Lisburn, Forestside, and Dundonald) and the populations were identified. The interview survey revealed that respondents from Lisburn catchment including Hillsborough and Moira did most of their main food shopping (convenience shopping) in Lisburn and Sprucefield. Respondents from the Forestside catchment including Newtownbreda and Carryduff did most of their main food shopping at the Forestside Shopping Centre. Those from Dundonald catchment did most of their food shopping in Dundonald.

4.5 For comparison goods, Lisburn catchment represented the main catchment for Lisburn itself but the other two catchments Forestside and Dundonald did not relate to Lisburn, or to each other. The attraction to centres outside the Council area, mostly Belfast was significant. Consideration of the three catchment areas separately is more relevant.

4.6 The study identified that the population of the Council area is to grow from 141,181 in 2016 to 155,456 in 2027 (8.8%).

National Trends in Retailing

4.7 The forecast growth for the economy in Northern Ireland for 2018 is very low at 0.9% and pressure on household incomes and consumer spending including shopping are likely. The UK economy is expected to grow between 1.5% and 1.7%.

4.8 Convenience retail expenditure per capita in the UK is forecast to be almost unchanged from 2017- 2027 with a decline of 0.1% per annum. This trend has contributed to bringing the development of large supermarkets to an end, in favour of smaller stores.

4.9 Comparison retail expenditure is forecast to grow at 2.8% per annum in the UK, which is lower than forecasts made in the past. Growth in internet retail spending is set to continue.

4.10 Multiple retailers prefer retail parks to traditional town centres as unit sizes in the latter are smaller or not configured for their needs. This has generated market interest in retail parks in cases where there are possibilities of securing consents for a wide range of goods, rather than bulky goods.

4.11 The contribution of independent retailers is becoming ever-more important to town centres, as the proportion of multiple retailers declines in town centres. Non retail services such as restaurants, leisure and personal services usually account for a high proportion of occupiers in town centres and can generate ‘destination’ appeal.

4.12 The expansion of on-line shopping has impacted adversely on the number of comparison shops in town centres. Many successful retailers operate multi-channel sales, with both internet and counter sales.

Convenience Expenditure and Turnover

4.13 This section of the report identifies the convenience and expenditure turnover relationships for the three catchments and the Council area as a whole. A total of 79% of convenience shopping by Lisburn catchment residents is done locally. In Forestside catchment, 76% of convenience shopping is done locally. In Dundonald 60% of convenience shopping is done locally. The rest in these catchment areas is done outside the Council area.

4.14 The report also identifies convenience floorspace derived from recent survey data purchased from Experian Goad and rates of over/under trading. There is moderate overtrading in the Council area as a whole at 12% above average levels. The overtrading is within the Lisburn Catchment area with very slight under-trading in the Forestside catchment. In Dundonald, trading is just below average levels.

Convenience Expenditure Capacity

4.15 This section of the report provides estimates of the spare convenience retail expenditure capacity that could service new retail floorspace using forecasts. *The planning context for defining spare capacity is the level of new retail development that can be accommodated without threatening the vitality and viability of established town centres*. In the Lisburn catchment area, under the low estimate there is forecast spare convenience expenditure capacity of £35 million by 2022, rising to £42 million by 2027, if there is no new store development beyond the existing planning consents identified in the research.

4.16 No spare convenience expenditure capacity relating to the Forestside catchment area is forecast. In the Dundonald catchment area, only a minimal minor level of spare capacity is forecast, of just over £1 million by 2027. Under the high estimate, there is spare convenience expenditure capacity of up to £51 million by 2027. This could support a few medium and small store developments, including discount foodstore operators.

Comparison Expenditure and Turnover

4.17 This section sets out the comparison expenditure ad turnover relationships and provides forecasts of spare capacity. The household survey reveals that for comparison shopping, Lisburn draws limited trade from residents of Forestside catchment and a minimal level from Dundonald. In the Lisburn catchment area, 61% mainly shop for comparison goods at Lisburn and Sprucefield. In the Forestside catchment area, 38% mainly did their comparison shopping at Forestside with 54% mainly shopping outside the Council area. In Dundonald, only 7% shop locally for comparison goods.

4.18 From the conclusions of shopping patterns consideration of future opportunities for comparison retail development should include Forestside separately from Lisburn. Dundonald is too small as a centre for comparison shopping to provide the platform needed to support major additions of comparison floorspace.

4.19 Evidence from the street shopper surveys in the City Centre and at Sprucefield, indicate that around 50% of the turnover of Sprucefield is generated by customers from beyond the Council area, which reveals its function as a regional shopping centre. This compares to 30% in Lisburn City Centre.

4.20 In the Forestside catchment, it was estimated that 50% of the comparison turnover came from outside the area, mostly from Belfast suburbs, as the shopping centre is right on the border of the Council area.

4.21 Unlike convenience retailing, comparison retailing is not dominated by a few participants so the concept of over/under trading has limited application for comparison retailing.

Comparison Expenditure Capacity

4.22 This section provides estimates of the spare comparison retail expenditure capacity that could service new retail floorspace in each of the three catchment areas and the Council area as a whole. It could potentially accommodate a substantial increase in comparison retail floorspace mostly in the City Centre and Sprucefield.

4.23 The overtrading at Sprucefield suggests that it is fair to consider that half the spare expenditure capacity may relate to potential additions to Sprucefield. The actual distribution between Sprucefield and Lisburn will also depend on the market and on planning decisions. In the forestside catchment, there is no anticipated spare capacity up to 2022, but a small increase from 2022-2027. In Dundonald catchment, the forecast spare capacity is minimal.

Sprucefield Expansion

4.24 Sprucefield is the only regional shopping centre in Northern Ireland. In the Consultants assessment of future expansion based on retail expenditure two hypothetical development scenarios are put forward.

4.25 **Scenario 1**: a scheme of 50,000 sq. m gross of mainly comparison retail floorspace, anchored by a major department store with other retailers.

4.26 **Scenario 2**: a scheme of 50,000 sq. m development divided into 25,000 sq. m gross retailing and 25,000 sq. m leisure. This leisure element would probably include a cinema, restaurants and other attractions.

4.27 In the current market, leisure is of fundamental importance to support very large retail developments so it is concluded that Scenario 2 is more realistic.

4.28 In the opinion of the study, both scenarios would alter the shopping patterns of the Lisburn catchment area. Scenario 1 would create a risk for Lisburn City Centre without obvious benefits. Scenario 2 would still create risk and some potential retailer interest away from the City Centre, but not to the extent as under Scenario 1.

4.29 In the event of any major application to expand Sprucefield, the applicants would require to provide the Council with a supporting retail impact assessment to demonstrate that the vitality and viability of the City Centre, and other established town centres, would not be materially threatened.

Conclusions for the LDP Preferred Options

Lisburn Catchment

4.30 The forecasts provide guidance on the extent to which new retail floorspace could be accommodated in the town centres, including Lisburn City Centre and Sprucefield.

4.31 The study findings are that the forecast expenditure capacity would support additional new comparison retail floorspace in Lisburn City Centre and at Sprucefield.

Forestside Catchment

4.32 The forecasts find that there is no spare capacity for convenience expenditure but it would not rule out very small development proposals. In terms of comparison retail expenditure there is some spare capacity that could support minor additions to the existing centre and retail park.

Dundonald Catchment

4.33 The forecasts show very minor levels of spare capacity for convenience retail expenditure that could support small shops and extensions. With comparison retail expenditure there is some spare capacity that could potentially support small shops.

Support for the Preferred Options

4.34 **Preferred Option 11a - extend the existing City Centre Boundary:** the spare expenditure capacity in the study gives support to the option. It is the combination of complementary uses which will best generate increased attraction of the public to the City Centre as a destination. Strengthening the retail and leisure sectors will be essential to compete successfully with the larger offer in Belfast and also to maintain its attraction if the possible expansion of Sprucefield happens. (More analysis of the opportunities for the City Centre is provided in the Town Centre Health Check document)

4.35 **Preferred Option 12a - retain the existing town centre of Carryduff and designate town centre boundaries in Hillsborough and Moira:** these are small towns where the level of market interest is more likely to relate to modest additions to the convenience retail offer. There is scope for Hillsborough and Moira to draw a small share of the forecast capacity in the Lisburn Catchment area. Carryduff has an existing consent for a Lidl store, and significant further additions are likely to be minor.

4.36 **Preferred Option 13a - Retain and reinforce Sprucefield as a Regional Shopping Centre:** the evidence from the study supports this option as Sprucefield is functioning as a regional shopping centre, with around half of customers originating outside the Council area. Additional capacity would be generated by large scale expansion, including retailing and leisure and any planning application can be supported with a retail impact assessment to protect the City Centre.

4.37 **Preferred Option 14a – Extend District and Local Centre Boundaries at Forestside and Dundonald:** there is little scope for any additional convenience retail floorspace at Forestside but the catchment would support modest additions to the comparison retail offer and the existing uses around Drumkeen Retail Park and Homebase would support and consolidate Forestside in its role as a District Centre.

4.38 The preferred option for Dundonald to include extending the Local Centre Boundary to include the park and rise site is addressed in the Town Centre Health Checks.

Town Centre Health Checks

4.39 Ove Arup and Partners Ltd with Roderick MacLean Associates Ltd were also tasked with carrying out health checks for Lisburn City Centre, Dundonald Local Centre and the three towns of Carryduff, Hillsborough and Moira. This is to support the Preferred Options and also to look at the alternative options. Household and on-street surveys were carried out. The health checks include a number of indicators:

- Existing town centre uses, including resident population
- Vacancy rates
- Physical structure and environmental quality
- Footfall
- Retailer Representation
- Attitudes and perceptions
- Prime Rental Values
- Commercial yields

4.40 Please see the Town Centre Health Check Report carried out by the Consultant's for further detail and analysis of the findings. The Summary on page 46 of their report address the Preferred Options for Lisburn City Centre, Carryduff, Hillsborough and Moira Town Centres and also Dundonald Local Centre.

5.0 RETAIL CAPACITY STUDY 2018

Lisburn & Castlereagh City Council

Lisburn & Castlereagh Retail Capacity Study 2018

February 2018

Ove Arup & Partners Ltd

In association with Roderick MacLean Associates Ltd

Ove Arup & Partners Ltd, Bedford House, 16-22 Bedford Street, Belfast BT2 7FD Roderick MacLean Associates Ltd, 1/2 West Cherrybank, Stanley Road, Edinburgh EH6 4SW

Contents

1 Introduction

1.1 The research

1.1.1 *Ove Arup & Partners Ltd* with *Roderick MacLean Associates Ltd* as sub consultants, were appointed by Lisburn & Castlereagh City Council in 2017 to prepare a retail capacity study for the Council area and to prepare health checks on Lisburn City Centre and other selected town centres.

1.1.2 The main purpose of the research is to inform the emerging Local Development Plan (LDP) for the Council area, together with providing supporting information to update the Lisburn City Centre Masterplan. Arup met with the City Centre Ambassadors on Thursday 14th December 2017 to gain early feedback to the Lisburn City Centre Masterplan review. Various aspects were addressed across both the retail and commercial leisure sectors.

1.1.3 More specifically, the research is aimed at informing the Council's *Preferred Options* on retailing and town centres in the LDP *paper* for public consultation. These include:

- **Option 11A Preferred Option:** Extend the existing City Centre boundary - this option proposes an extension to the existing City Centre boundary to include the Lisburn Leisure Park complex located on Governors Road/Laganbank Road. This option could strengthen the existing City Centre by providing further expansion of the existing boundary and greater linkages between the retail, commercial and leisure offer in the City Centre. The area of open space at Union Bridge offers a further potential extension to the City Centre boundary and opens up links between the City Centre and the River Lagan. The extension of the boundary to include the lower end of Longstone Street also offers potential to provide linkages between this thriving area and the City Centre. (pg 105)

- **Option 12A Preferred Option**: Retain the existing town centre of Carryduff and designate town centre boundaries in the historic towns of Hillsborough and Moira - This option enables the provision of a new town centre boundary for each of these towns to align with the existing Conservation Areas. (pg 107)

- **Option 13A Preferred Option:** Retain and reinforce Sprucefield as a Regional Shopping Centre – This option prioritises Sprucefield as a Regional Shopping Centre recognising its key strategic location on the North-South economic corridor and Key Transport Corridors. (pg 109)

- Option 14A Preferred Option: Extend District and Local Centre Boundaries – amend the boundaries of Forestside District Centre to include adjacent lands to the north including the Homebase and Drumkeen Retail Park; and Dundonald Local Centre to include the Park & Ride site to the north-east. (pg 111)

1.1.4 The research has been divided into two documents, of which this report is the first one below:

- **The Retail Capacity Study-** containing forecasts of spare retail expenditure capacity from 2017-27, which could support new retail development in Lisburn and in the rest of the Council area;

- **Town Centre Health Checks**- for *Lisburn City Centre* and the town centres of *Dundonald, Carryduff, Hillsborough and Moira*. The health checks apply a set of key performance indicators to each town centre. The findings provide guidance for the emerging LDP on relevant issues and opportunities for each town which future policies need to address.

1.2 Interview surveys

1.2.1 Two interview surveys were undertaken by NEMS Market Research for our consultancy team as part of the research.

Household survey

1.2.2 A telephone interview survey was conducted on a sample of 1,100 households throughout the Council area, using a structured questionnaire. The purpose was to identify the shopping patterns of residents and to collect information on their use and perceptions of the town centres for the health check assessments.

1.2.3 The Council area was divided into six zones with interview quotas applied accordingly. This enabled the three distinct retail catchment areas to be identified within the Council area in terms of shopping patterns.

1.2.4 More detail on the household survey zones, populations, and selected questions asked in relation to shopping patterns, is given in Appendix 1. The NEMS output tables are available as a separate document to accompany this report.

On-street interview surveys

1.2.5 Face-to-face interview surveys were conducted in Lisburn City Centre and at Sprucefield Shopping Centre, from samples of 200 at each centre. A structured questionnaire was used. The main purpose was to identify the proportion of shoppers coming from outside the Council area, and their contribution to the turnover of the centres (expenditure inflows). The street surveys were also conducted by NEMS Market Research and further detail is provided in Appendix 2. The NEMS output tables are also available as a separate document to accompany this report.

1.3 Price base

1.3.1 All values of retail expenditure and turnover in this study are expressed in constant 2016 prices.

1.4 Qualitative issues

1.4.1 Qualitative issues associated with retailing in the study area are addressed in the Town Centre Health Checks document, together with local market conditions and the contribution of retailing to uses in the town centres, including future opportunities.

2 Retail catchment areas and population

2.1 Retail catchment areas

2.1.1 Map 2.1 illustrates the three retail catchment areas within the Lisburn & Castlereagh Council area. They were defined in the basis of the household survey findings on the patterns for both convenience and comparison shopping from the zones mentioned in section 1 and Appendix 1.

2.1.2 The interview survey revealed that respondents from the *Lisburn catchment*, including residents of Hillsborough and Moira (from the zone analysis) did most of their main food shopping in Lisburn and at Sprucefield. Respondents from the *Forestside catchment*, which includes the Newtownbreda area plus Carryduff (from the zone analysis), did most of their main food shopping at the Forestside Shopping Centre. Those from the *Dundonald catchment* did most of their main food shopping in Dundonald.

2.1.3 For comparison goods shopping, it emerged that the Lisburn catchment represented the main catchment for Lisburn itself, as for convenience shopping. The smaller catchment areas of Forestside and Dundonald did not relate closely to Lisburn, nor much to each other. The attraction to centres outside the Council area, notably Belfast, was much more significant. Therefore, consideration of the three catchment areas separately is more relevant than just capacity estimates for the Council area only. More detail on the shopping patterns is given in the sections on convenience and comparison retailing later in this report.

2.2 Population projections

2.2.1 The current and projected populations of the catchment areas to 2027 are shown in Table 2.1. These derive from super output area data from NISRA and their 2014 based population projections, with explanation in the footnote to the table.

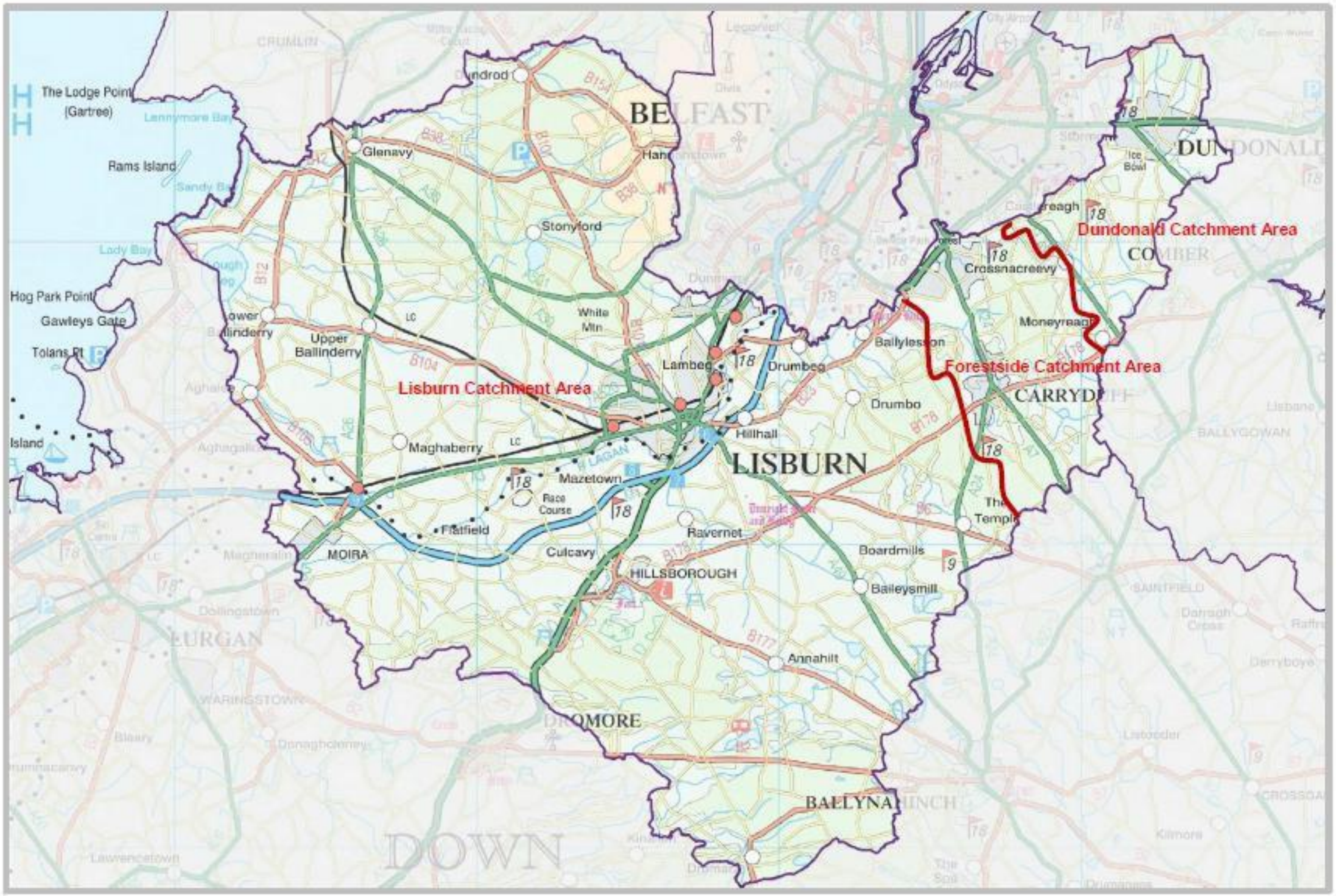
2.2.2 There is a projected increase in the Council area population of some 12,600 from 2017-28 (+8.8%).

Table 2.1
Lisburn & Castlereagh City Council area: retail catchment area population projections

Name	2016	2017	2022	2027
Lisburn catchment	98,082	99,244	103,800	107,999
Forestside catchment	23,976	24,260	25,374	26,400
Dundonald catchment	19,123	19,349	20,238	21,057
Total Council area	**141,181**	**142,853**	**149,411**	**155,456**
Population growth from 2017-27				**8.8%**

Note
Data for 2016 derives from groups of NISRA super output areas and their populations.
The figures for 2017, 2022 and 2027 are based on the NISRA 2014 based population projections for the Lisburn & Castlereagh City Council area, apportioned to the catchment areas.
Lisburn catchment= zones 1 (Lisburn), 5 (Hillsborough) & 6 (Moira) in the NEMS household survey.
Forestside catchment= zones 2 (Forestside) & 4 (Carryduff)
Dundonald catchment= zone 3 (Dundonald)

Map 2.1 Lisburn & Castlereagh retail catchment areas



3 National trends in retailing

3.1 Introduction

3.1.1 This section is a summary of the national trends in retailing which form part of the context for interpretation of the forecasts of spare retail expenditure capacity in this study.

3.2 Economy

3.2.1 Forecasts from the EU, the IMF and the OECD have downgraded forecast growth in the UK economy to between 1.5% and 1.7% this year. Much of this slowing growth is believed to be caused by the uncertainty over Brexit and delayed/ reduced investment. The forecast growth for Northern Ireland for 2018 is very low at 0.9%, (Price Waterhouse Cooper).

3.2.2 The forecasts, combined with squeezing of household incomes are likely to have a dampening effect on consumer spending in the long run, including shopping. Many items may become more expensive after Brexit occurs. Notably, food prices are already rising.

3.3 Retail expenditure trends

3.3.1 Convenience retail expenditure per capita in the UK is forecast to be almost unchanged from 2017-27, with a miniscule decline of -0.1% per annum (Experian). This trend has contributed to bringing the development of large supermarkets to an end, in favour of smaller stores which divert trade way from existing convenience retailers (division of the cake rather than more cake).

3.3.2 Comparison retail expenditure is forecast to grow more substantially at 2.8% per annum in the UK, which is lower than forecasts made in the past. Growth in internet retail spending is set to continue.

3.4 Retail market trends

3.4.1 The current trend in retail market demand among the major national multiples is to concentrate most of their requirements in the largest centres, including large regional shopping centres. Investment in smaller, but major centres such as Lisburn is successful where retail rents and other factors retain the multiple representation. Otherwise, the threat of retailer disinvestment in smaller town centres remains. Consumers increasingly travel to access a wider range of goods and services; or shop via the internet.

3.4.2 Multiple retailers generally have their preferred unit formats. Often these cannot easily be satisfied in traditional town centres, where unit sizes are commonly smaller or not ideally configured for their needs. This has generated market interest in retail parks in cases where there are possibilities of securing consents for selling a wide range of goods, rather than bulky goods. Boucher Shopping Park is a good example. The trend can pose threats to traditional town centres if retail parks selling a mix of goods, grow to become large scale competitors with town centres.

3.4.3 The contribution of independent retailers is becoming ever-more important to town centres, as the proportion of multiples declines in smaller towns. These operators help keep shop unit retail occupancies up, but often face difficulties with rates and costs generally, in face of increasing competition.

3.4.4 Non-retail services, including restaurants, leisure and personal services usually account for a high proportion of occupiers in town centres generally. In the largest centres, commercial leisure services form an important complement to the retail offer in terms of generating ‘destination’ appeal.

3.4.5 In some locations, there will be lower levels of retail business- with fewer national retailers, lower rents, shorter leases and higher vacancies – than they historically enjoyed

3.4.6 Among the greatest changes in recent years is the expansion of online shopping, which has contributed to decimation of the numbers of comparison shops in medium and small towns especially. The trend is for further increases, but levelling-off. Many successful retailers operate multi-channel sales services, with both internet and counter sales.

3.4.7 There is considerable uncertainty over the extent to which internet retailing will expand. Widespread shop closures on high streets generally, are evidence of changing shopping habits among shoppers. Comparison goods retailer demand is more orientated towards redevelopment and reconfiguration of existing units, with upgrades in the quality and range of offer.

3.4.8 At the budget end, retailers such as Primark, B&M and Home Bargains have flourished as shoppers seek value for money.

3.4.9 In the convenience sector, there is negligible interest in developing more superstores, as the market has changed and the large non-food components of floorspace have experienced fierce competition from online retailing.

3.4.10 The main drivers have been the discount foodstores, which include Aldi and Lidl, although the Press report no plans by Aldi to open stores in Northern Ireland. Small convenience store development, such as Tesco Express and Sainsbury's Local have also made considerable inroads in the UK, as many customers now prefer to shop more locally, although there are no Sainsbury's Local stores in Northern Ireland.

4 Convenience expenditure and turnover

4.1 Introduction

4.1.1 This section examines the convenience expenditure and turnover relationships in the Council area, taking account of the current shopping patterns based on the household survey. The analysis covers each of the three catchment areas, and the Council area as a whole. Thus, the total turnover in each catchment area derives from the residents' expenditure potential, plus inflows, less outflows of expenditure.

4.1.2 The distribution of turnover among the various centres and supermarkets is then controlled to the total deduced turnover for each catchment area from the shopping patterns.

4.2 Convenience goods-definition

4.2.1 Convenience goods include:

- *Food and non- alcoholic drinks*
- *Alcoholic drinks*
- *Tobacco*
- *Most non- durable household goods (90%); and*
- *Newspapers and magazines.*

4.2.2 This definition is provided in Experian *Retail Planner, Briefing Note 15, December 2017*

4.3 Convenience expenditure potential

4.3.1 Table 4.1 shows the forecast expenditure per capita data for the Lisburn & Castlereagh City Council area, based on data commissioned from Experian for this study, which shows a slight decline up to 2027.

4.3.2 Special forms of trading (SFT), including internet shopping, are removed from the expenditure per capita data, so that it relates to conventional shop floorspace, as shown in Table 4.1. The proportion of SFT, or non-store sales, is projected to increase up to 2027. It should be noted that the proportions of SFT shown in this table do not include internet home delivery coming from existing supermarket shelves, which is a much higher proportion, though dependent on store floorspace. The national proportions are applied in Table 4.1.

4.3.3 Forecasts of the total convenience expenditure potential of the residents of each catchment are shown in Table 4.2. The level of forecast population growth, combined with the slight decline in expenditure per capita, drives an overall growth in expenditure to 2027.

4.4 Convenience shopping patterns-market shares

4.4.1 For convenience shopping, the respondents were asked *where they last visited for their main food shopping*, *and the time before that*. They were also asked *where they last visited for their top-up shopping*. These are assumed to be the stores most frequently visited. The findings were combined to provide estimates of all convenience shopping patterns relating to each of the three catchments, as shown in Table 4.3. The supporting information is provided in Appendix 3.

4.4.2 Market shares refer to the proportions of expenditure from residents of a defined area which are spent in that area and in other areas. Table 4.3 shows the convenience market shares for each catchment area, based on the shopping patterns identified from the household survey.

4.4.3 More detail on the specific stores/ centres visited is shown in the graphs in Figure 4.1 overleaf. Internet/ delivery shopping accounted for just over 2% of the responses overall, with the following reported delivery shares among those who used it: Tesco 53%, ASDA 24% and Sainsbury's 11%.

Table 4.1
Lisburn & Castlereagh City Council area: convenience expenditure per capita per annum (in 2016 prices)

	2015 £	2017 £	2022 £	2027 £
Council area	2,233	2,257	2,249	2,253
**excluding special forms of trading*				
Council area		*2,184*	*2,157*	*2,148*

Note
Original Experian figures for 2015 are in 2015 prices. These have been adjusted to 2016 prices by a factor of 0.98597 from *Experian Retail Planner Briefing Note 15, Appendix 4b- dated December 2017*
The grow th rates derive from the above Experian document, Appendix 4a.

	2015-17	2017-22	2022-27
Grow th rates	1.0106	0.9968	1.0018

*An allow ance for special forms of trading (SFT) is deducted so that the exenditure per capita relates to sales from conventional retail floorspace. The % deductions derive from *Experian Retail Planner Briefing Note 15, Appendix 3, Figure 5 - December 2017*

Deductions for SFT	-3.2%	-4.1%	-4.7%

SFT mostly comprises internet spending, w hich does not mainly relate to conventional shop floorspace

Table 4.2
Lisburn & Castlereagh residents' convenience expenditure potential (in 2016 prices)
Excluding SFT (special forms of trading)

Catchment areas	2017 £ million	*growth 2017-22 £ million*	2022 £ million	*growth 2022-27 £ million*	2027 £ million
Lisburn	216.8	*7.1*	223.9	*8.0*	231.9
Forestside	53.0	*1.7*	54.7	*2.0*	56.7
Dundonald	42.3	*1*	43.7	*1.6*	45.2
Total Council area	312.0	*10.3*	322.3	*11.6*	333.8

Note
From Tables 2.1 and 4.1. Figures are rounded.

Table 4.3
Lisburn & Castlereagh City Council area residents- all convenience shopping patterns (Q1-Q3 combined) in 2016

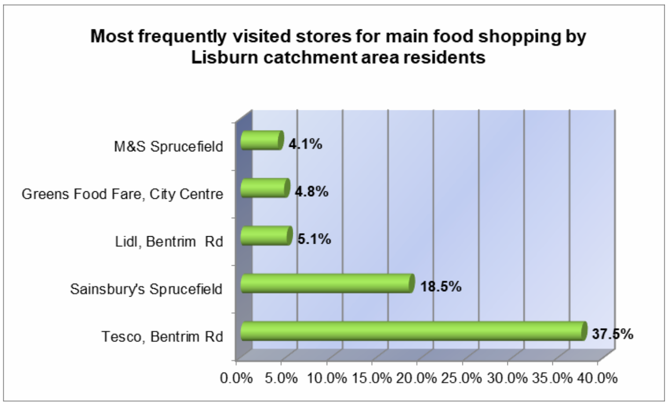
Catchment areas	**Origin of shoppers** Lisburn catchment	Forestside catchment	Dundonald catchment	Total Council area
Destination				
Lisburn catchment shops	79%	2%	2%	56%
Forestside catchment shops	3%	76%	9%	16%
Dundonald catchment shops	0%	1%	60%	8%
Outside Council area	18%	21%	29%	20%
Total	100%	100%	100%	100%

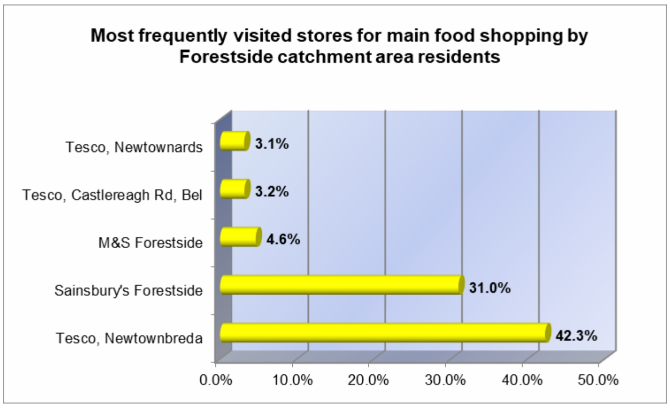
Source: NEMS household shopping interview survey 2016 for the Council
The above data relates to the weighted survey data and filtered to remove don't knows, varies, internet and mail order
Main food shopping (Q1&Q2) and top-up shopping (Q3) is weighted 80%:20% for the combination. See Appendix 3

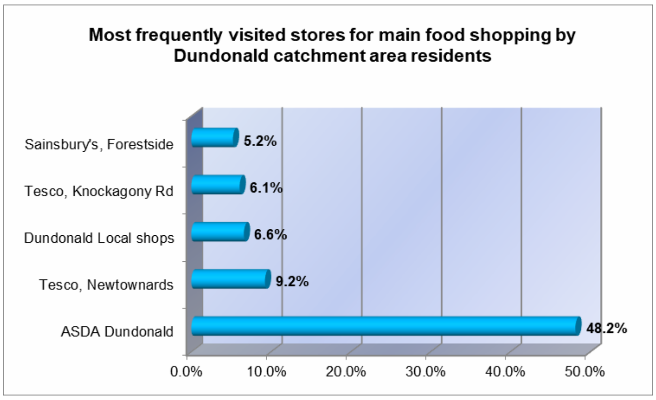
4.4.4 Table 4.3 reveals that 79% of convenience shopping by Lisburn catchment residents is done locally, with the balance mainly in locations outside the Council area. In the Forestside catchment, 76% of convenience shopping is done locally, with the balance mainly at stores outside the Council area. In Dundonald, 60% of convenience shopping is done locally, with most of the rest done outside the Council area, including in Newtownards.

Figure 4.1 Main food shopping patterns- most frequently visited stores (household survey)

Q1 & Q2 combined, excluding don't knows, varies, internet







4.5 Convenience expenditure and turnover by catchment area

4.5.1 The relationship between total expenditure and turnover in each catchment area was defined in paragraph 4.1.1. While the household survey provides the basis for estimating expenditure inflows and outflows for residents of each catchment area, it does not show expenditure inflows from outside the Council area.

4.5.2 To achieve estimates of the expenditure inflows to the Council area, we have drawn on the results of the street- shopper interviews in Lisburn City Centre and at Sprucefield (see Appendix 2. The calculations are shown in Appendix 4, which identify the proportions of respondents from outside the Council area, whose main reason for visiting the centres was to shop for food and groceries.

4.5.3 From this, their contribution to the convenience turnover of these centres was estimated and expressed as a proportion of the Lisburn catchment residents' expenditure potential. In the Forestside catchment, it was estimated that 50% of the convenience turnover of the centre came from outside the area; principally from the Belfast suburbs, as the shopping centre is right on the border of the Council area. A NEMS household survey in Comber 2015 revealed that some shoppers visited Dundonald for food shopping- see Appendix 4.

4.5.4 Tables 4.4 to 4.7 show the survey based convenience expenditure and turnover relationships for each catchment area and for the Council area in 2017, 2022 and 2027.

Table 4.4
Lisburn catchment area convenience expenditure and turnover 2017 (in 2016 prices)

	%	2017 £million	2022 £million	2027 £million
Main catchment residents' expenditure potential		216.8	223.9	231.9
Add: inflows from rest of Council area	1%	1.8	1.8	1.9
inflows from outside Council area	11%	23.9	24.7	25.6
Less: outflows	-21%	-46.0	-47.5	-49.2
Retained expenditure (turnover)		196.5	203.0	210.2

Note
Inflow s and outflow s from Appendices 3 & 4

Table 4.5
Forestside catchment area convenience expenditure and turnover 2017 (in 2016 prices)

	%	2017 £million	2022 £million	2027 £million
Main catchment residents' expenditure potential		53.0	54.7	56.7
Add: inflows from rest of Council area	21%	11.3	11.7	12.1
inflows from outside Council area	38%	20.0	20.6	21.4
Less: outflows	-24%	-12.5	-12.9	-13.4
Retained expenditure (turnover)		71.7	74.1	76.8

Note
Inflow s and outflow s from Appendices 3 & 4

Table 4.6
Dundonald catchment area convenience expenditure and turnover 2017 (in 2016 prices)

	%	2017 £million	2022 £million	2027 £million
Main catchment residents' expenditure potential		42.3	43.7	45.2
Add: inflows from rest of Council area	1%	0.6	0.6	0.6
inflows from outside Council area	5%	2.1	2.2	2.2
Less: outflows	-40%	-17.0	-17.5	-18.2
Retained expenditure (turnover)		28.0	28.9	29.9

Note
Inflow s and outflow s from Appendices 3 & 4

Table 4.7
Council area convenience expenditure and turnover 2017 (in 2016 prices)

	%	2017 £million	2022 £million	2027 £million
Council residents' expenditure potential		312.0	322.3	333.8
Add:				
inflows from outside Council area	15%	46.0	47.5	49.2
Less: outflows	-20%	-61.4	-63.4	-65.7
Retained expenditure (turnover)		296.2	306.0	316.9

Note
Inflow s and outflow s from Appendices 3 & 4

4.6 Convenience floorspace and turnover 2017

4.6.1 The current distribution of convenience floorspace in the Council area and in the three catchment areas is shown in Table 4.8. The retail floorspace data for Lisburn City Centre, Sprucefield and Forestside Shopping Centre derives from recent survey data purchased from Experian Goad. For supermarkets outside these centres, the data is based on measurements from Google Maps (measuring tool) and from planning applications viewed on the Planning NI online portal. For the small towns and villages, the information is based on street survey counts of individual units by our team, converted to floorspace by application of an average unit size.

4.6.2 Average company turnover/ floorspace ratios from the Retail Rankings 2017 are applied to the main supermarkets, with adjustments to include VAT and remove petrol/ non-retail sales, expressed in 2016 prices. These ratios also embrace recent research published by Mintel on the split of convenience and comparison floorspace among the various operators and the associated division of turnover. Estimated average ratios are applied to other shops. Table 4.8 shows the total average turnover in each catchment area at average levels, based on this method.

4.6.3 Comparison with the survey based totals (actual turnover) is included for each area in Table 4.8, to indicate where there is any over or under-trading. From the table, there is a moderate level of over-trading in the Council area as a whole of 12% above average levels. The over-trading is within the Lisburn catchment area, with very slight under-trading in the Forestside catchment. The Tesco Extra at Newtownbreda and the Sainsbury's at Forestside account for most of the convenience turnover in the Forestside catchment, so most likely they are largely accounting for the under-trading. In the Dundonald, trading is only just below average levels.

4.6.4 On a technical point, there is there is no widely agreed benchmark for determining any over/ under-trading. Some consultants ignore the subject and rely on the survey based ratios only, although there are issues related to inaccuracy of survey based estimates at the individual store level.

4.7 Convenience planning consents

4.7.1 Table 4.9 shows the current convenience retail planning consents in the Council area. These include consent for a supermarket on the site of the former Down Public House at Ballinderry Road and provision for a Lidl store as part of the redevelopment site forming the proposed new Carryduff Shopping Centre. It is understood that the occupier of Ballinderry Road site is likely to be Home Bargains, which is a mixed goods retailer, but under the consent most of the floorspace is limited to the sale of convenience goods.

4.7.2 These consents are treated as deductions from the forecast spare capacity under the usual convention for retail capacity studies.

Table 4.8
Lisburn & Castlereagh City Council areae: convenience floorspace and turnover, 2017 (in 2016 prices)

	Floorspace sq m gross	Floorspace sq m net	Av. turnover ratio £/sq m	Turnover £million	Market share within catchment
LISBURN CATCHMENT					
Lisburn City Centre Total	**7,070**	**4,751**		**35.0**	22%
M&S Simply Food	1,290	903	10,301	9.3	
Tesco Express	300	225	15,265	3.4	
Iceland	1,210	847	7,316	6.2	
Rest of City Centre	4,270	2,776	5,800	16.1	
Other stores					
Tesco, Bentrim Rd, Lisburn (total 5,625 sq m gross)-85% conv	4,781	2,869	10,529	30.2	19%
Sainsbury's, Sprucefield (total 8,330 sq m gross)-80% conv	6,664	3,998	11,181	44.7	28%
M&S Sprucefield (total 8,870 sq m)-est proportion	1,500	900	10,301	9.3	6%
Lidl, Bentrim Rd, Lisburn (1,595sq m gross total) 85% conv	1,356	1,017	8,373	8.5	5%
Lidl, Moira Rd, Lisburn (1,326sq m gross total) 85% conv	1,127	845	8,373	7.1	4%
Co-op, Longstone St, Lisburn	540	324	8,230	2.7	2%
Co-op, Belsize Rd, Lisburn	594	356	8,230	2.9	2%
Morrow's SuperValu, Knockmore Rd, Lisburn	816	490	8,230	4.0	3%
SuperValu, Moira	720	432	8,230	3.6	2%
Other Moira shops (6 units at av of 170 sq m each)	1,020	612	3,770	2.3	1%
Co-op, Hillsborough	400	240	8,230	2.0	1%
Other Hillsborough shops (6 units at av of 170 sq m each)	1,020	612	3,770	2.3	1%
Other catchment shops (estimate)	1,800	1,080	3,770	4.1	3%
Total at average levels				158.7	100%
Over-trading			*24%*	*37.9*	
Total from survey (actual levels)				196.5	
FORESTSIDE CATCHMENT					
Sainsbury's, Forestside Centre (total 5,690 sq m gross)- 85% conv	4,837	2,902	11,181	32.4	43%
Sainsbury's off-licence & a butcher, Forestside Centre	530	318	8,000	2.5	3%
M&S Forestside (total 4,170 sq m)-est proportion	800	480	10,301	4.9	7%
Tesco Extra, Newtownbreda-total 7,741sq m gross (63% conv)	4,877	2,908	10,529	30.6	40%
Tesco Express, Cairns Hill	300	225	15,265	3.4	5%
Carryduff shops (3 units at av of 170 sq m each)	510	306	3,770	1.2	2%
Other catchment shops (estimate)	400	240	3,770	0.9	1%
Total at average levels				76.0	100%
Under-trading			*-6%*	*-4.3*	
Total from survey (actual levels)				71.7	
DUNDONALD CATCHMENT					
Eurospar	319	191	3,770	0.7	3%
Other Dundonald TC shops (2 units at av of 170 sq m each)	340	204	3,770	0.8	3%
ASDA, Upper Newtownards Rd (total 3,580 sq m gross)-90% conv	3,222	1,933	14,153	27.4	95%
Total at average levels				28.9	100%
Over-trading			*-3%*	*-0.9*	
Total from survey (actual levels)				28.0	
Total Lisburn & Castlereagh at average levels				263.5	
Over-trading			*12%*	*32.7*	
Total Lisburn & Castlereagh from survey (actual levels)				296.2	

Note
Gross floorspace based on the following sources: Goad data, planning applications, and measurements from Google Maps.
Average supermarket turnover ratios based on the Retail Ranking 2017 and other Mintel research on supermarket operator floorspace, adjusted to remove petrol sales, plus an allowance for VAT added- in 2016 prices.
Market share is expressed at average trading levels

Table 4.9
Proposed convenience floorspace in the Council area: planning consents 2017 (in 2016 prices)

	Floorspace sq m		Turnover	Turnover
	gross	net	ratio £/sq m	£million
Ballinderry Rd, Lisburn -former Public House site S/2012/0153/O & LA05/2016/1054/RM Supermarket- total 2,508 sq m gross, 1,171 sq m net conv, 502 sq m net comp i.e 70% convenience floorspace and 30% comparison. Plus kiosk and pfs **Convenience floorspace element*	1,756	1,171	7,571	8.9
Carryduff Shopping Centre LA05/2016/1245/F- consent for redevelop site for mixed use development including 2,514 sq m retail- (for Lidl)- est 80% conv and 20% comp *Convenience floorspace element*	2,011	1,207	6,995	8.4

Note
Estimated turnover of the consents are based on company averages from the 2017 Retail Rankings
*The reserved matters consent indicatess that the occupier could by Home Bargains (a mixed goods retailer).

5 Convenience expenditure capacity

5.1 Introduction

5.1.1 This section provides estimates of the spare convenience retail expenditure capacity that could service new retail floorspace in the Lisburn & Castlereagh City Council area, including each of the three catchment areas. The forecasts of spare capacity are for the periods 2017-22, 2022-27 and for the total ten-year period 2017-27, after allowing for the existing planning commitments.

5.2 Definition

5.2.1 The planning context for defining spare capacity is the level of new retail development that can be accommodated without threatening the vitality and viability of established town centres. Spare retail capacity can exist in the following forms:

- Any current over-trading
- Growth in retained expenditure (turnover)
- Potential to claw back expenditure leakage
- Potential to attract new trade into the area
- 'Acceptable' levels of impact

5.2.2 A range of spare capacity can be prepared from these components, showing a low and high estimate, *after deducting planning commitments*. The **low estimate** includes any over-trading and the forecast growth in expenditure in the catchment areas over the target periods. The **high estimate** also includes the potential to claw back leakage and attract new trade into the catchment areas. Provision of a range of spare capacity normally reduces the need for sensitivity tests.

5.2.3 'Acceptable' levels of retail impact refer to the situation where new developments would not threaten the vitality and viability of established centres. By convention, this aspect is not usually embraced into capacity studies, because it is normally addressed by retail impact assessments in support of specific retail planning applications. The Council would then assess whether the retail impacts are 'acceptable' in terms of their effects on the vitality and viability of town centres. The Lisburn catchment offers the most potential to service additional convenience floorspace in this way, because of the concentration of supermarkets and superstores in the area, from which to divert draw trade.

5.2.4 The forecasts of spare convenience expenditure capacity in this report also include associated equivalent *net* floorspace estimates for broad guidance, based on the average turnover/floorspace ratio of the four main supermarket operators, as shown in the footnotes to the tables. The equivalent floorspace associated with the expenditure capacity would be greater for other operators with lower turnover ratios.

5.2.5 More weight should be given to the expenditure capacity figures, because retailer performance and formats varies widely.

5.3 Spare convenience expenditure capacity

5.3.1 **Low estimates**- Tables 5.1 to 5.4 show the forecast spare convenience expenditure for each of the three catchment areas and for the Council area in total, at the low end of the range. Forecasts beyond 2022 have a greater level of uncertainty, so should be treated with a degree of caution.

5.3.2 In the *Lisburn catchment area*, there is forecast spare convenience expenditure capacity of some £35 million by 2022 under the low estimate, rising to nearly £42 million by 2027, if there is no new store development beyond the existing planning consent.

5.3.3 There is no forecast spare convenience expenditure capacity relating to the *Forestside catchment area*. In the *Dundonald catchment area*, only a minimal minor level of spare capacity is forecast, of just over £1 million by 2027.

5.3.4 **High estimate**- For estimates at the high end of the range to apply, there would have to be potential to accommodate a supermarket or store which would be capable of reducing leakage and attracting new trade. In today's retail market, this could typically include a discount foodstore, sometimes in combination with another type of store. Previously, it would have required a superstore, but this type of development is no longer commonly of interest to the market, as the popular formats have changed to smaller stores.

5.3.5 In the *Lisburn catchment*, we have allowed for up to around 20% clawback of leakage to stores outside the Council area. Although the level of expenditure leakage from the catchment is substantial, it is doubtful that the proportion of claw back would be much higher, because of the number and choice of supermarkets and stores in neighbouring Belfast. Additional new convenience store developments are more likely to reduce the current over-trading first.

5.3.6 The potential to draw significantly more convenience expenditure into the Lisburn catchment from outside the Council area is probably very small. There is no obvious reason for shoppers from Belfast, for example, to by-pass the range and choice of stores in their area to travel further away to shop in Lisburn. Under the high estimate, there is potential spare convenience expenditure capacity of up to £51 million by 2027. This could support a few medium and small store developments, including discount foodstore operators for example.

5.3.7 Under the high estimates, there would be no difference for the *Forestside catchment* compared to the low estimate. For *Dundonald*, the additional spare capacity would be very small at less than £4 million.

Table 5.1
Lisburn catchment area: forecast spare convenience expenditure capacity (in 2016 prices)

				2017-22 £million	2022-27 £million	2017-27 £million
(a) Current over-trading (Table 4.8)				37.9		37.9
(b) Growth in retained expenditure (turnover)- Table 4.4				6.5	7.3	13.7
(c) Less planning consents- Table 4.9)				-8.9		-8.9
Low estimate	(a+b-c)			**35.4**	**7.3**	**42.7**
(d) Add: potential to reduce outflow		*2022*	*2027*			
Outflow £million- Table 4.4 (21%)		-47.5	-49.2			
To centres outside Council area (18%)-Table 4.3		-39.4	-40.8			
Potential to claw back up to 20% of leakage to stores outside Council area				7.9	0.3	8.2
(e) Add:potential to increase inflow- Table 4.4						
Assume negligible						
High estimate	(a+b-c+d+e)			**43.3**	**7.6**	**50.9**
Equivalent convenience floorspace				£ per sq m	£ per sq m	
* Turnover/ floorspace ratio				12,022	12,453	
				sq m net	sq m net	sq m net
Low				*2,900*	*600*	3,500
High				*3,600*	*600*	4,200

Note
Gross equivalent floorspace estimates have not been show n, as net /gross formats vary w idely. *Figures are rounded.*
* The turnover ratio derives from the 2017 Retail Rankings for the average of Sainsbury's, Tesco, Morrisons and ASDA, at £11,639 per sq m. The ratio is adjusted to relate to 2022 and 2027, based on % turnover grow th in Council area -Table 4.4

Table 5.2 **Forestside catchment area: forecast spare convenience expenditure capacity (in 2016 prices)**				
		2017-22 £million	2022-27 £million	2017-27 £million
(a) Current under-trading(Table 4.8)		-4.3		-4.3
(b) Growth in retained expenditure (turnover)-Table4.5		2.4	2.7	5.0
(c) Less planning consents- Table 4.9)		-8.4		-8.4
Total spare capacity (none)	(a+b-c)	**-10.4**	**2.7**	**-7.7**
The current under-trading does not suggest a strong platform for introducing additional floorspace through clawback of some leakage, so there is no 'high estimate'				

Table 5.3 **Dundonald catchment area: forecast spare convenience expenditure capacity (in 2016 prices)**					
			2017-22 £million	2022-27 £million	2017-27 £million
(a) Current under-trading (Table 4.8)			-0.9		-0.9
(b) Growth in retained expenditure (turnover)- Table 4.6			0.9	1.0	2.0
(c) Less planning consents- none			0.0		
Low estimate	(a+b-c)		**0.1**	**1.0**	**1.1**
(d) Add: potential to reduce outflow	*2022*	*2027*			
Outflow £million- Table 4.6 (40%)	-17.5	-18.2			
To centres outside Council area (29%)-Table 4.3	-12.8	-13.3			
Potential to claw back up to 20% of leakage to stores outside Council area			2.6	0.09	2.7
(e) Add:potential to increase inflow- Table 4.6					
Assume negligible					
High estimate	(a+b-c+d+e)		**2.6**	**1.1**	**3.7**
Equivalent convenience floorspace			£ per sq m	£ per sq m	
* Turnover/ floorspace ratio			12,022	12,453	
			sq m net	sq m net	sq m net
Low			*0*	*100*	100
High			*200*	*100*	300
Note Gross equivalent floorspace estimates have not been shown, as net /gross formats vary w idely. *Figures are rounded.* * The turnover ratio derives from the 2017 Retail Rankings for the average of Sainsbury's, Tesco, Morrisons and ASDA, at £11,639 per sq m. The ratio is adjusted to relate to 2022 and 2027, based on % turnover grow th in Council area -Table 4.4					

Table 5.4
Council area total : forecast spare convenience expenditure capacity (in 2016 prices)

	2017-22 £million	2022-27 £million	2017-27 £million
Low forecast			
Lisburn catchment	35.4	7.3	42.7
Dundonald catchment	0.1	1.0	1.1
Total	**35.5**	**8.3**	**43.8**
	sq m net	sq m net	sq m net
Equivalent supermarket floorspace	*2,900*	*700*	*3,600*
High forecast			
Lisburn catchment	43.3	7.6	50.9
Dundonald catchment	2.6	1.1	3.7
Total	**45.9**	**8.7**	**54.6**
	sq m net	sq m net	sq m net
Equivalent supermarket floorspace	*3,800*	*700*	*4,500*

Note
Only the Lisburn and Dundonald catchments have spare capacity.

6 Comparison expenditure and turnover

6.1 Introduction

6.1.1 This section sets out the comparison expenditure and turnover relationships for the Lisburn & Castlereagh City Council area and provides forecasts of spare capacity from 2017-22, 2022-27 and the ten-year period 2017 - 2027. The analysis covers each of the three catchment areas, and the Council area as a whole.

6.1.2 The distribution of turnover among the various towns and retail parks is controlled to the total deduced turnover for the three catchment areas from the shopping patterns.

6.2 Comparison goods- definition

6.2.1 Comparison goods excludes all convenience retail items:

- *Books*
- *Clothing and footwear*
- *Furniture, floorcoverings & household textiles*
- *Audi visual equipment, domestic appliances, small appliances and other durable goods*
- *Hardware and DIY supplies including tools*
- *Chemists' goods*
- *Jewellery, watches and clocks*
- *Bicycles*
- *Recreational and other miscellaneous goods, including personal care goods, and*
- *Remaining 10% of non-durable household goods.*

6.2.2 This definition is based on *Experian Retail Planner, Briefing Note 15, December 2017*.

6.3 Comparison expenditure potential and the internet

6.3.1 Table 6.1 shows the forecast expenditure per capita data for the Lisburn & Castlereagh City Council area, based on data commissioned from Experian for this study. The average annual forecast compound growth rate is 2.8% from 2017-27.

6.3.2 As explained in section 4, special forms of trading (SFT), which is mostly internet shopping, but includes mail order, are removed from the expenditure per capita data, so that it relates to conventional shop floorspace.

6.3.3 The proportion of comparison SFT derived from the household survey was 17.4% - see Appendix 5. We have rounded this up to 18% for 2017 in Table 6.1. In fact, this proportion is quite low compared to the UK average of 21% by Pitney Bowes. Recent household surveys by NEMS for retail studies elsewhere in the UK are close to the Pitney Bowes estimate for 2017, or slightly higher. For this reason, we favour the Pitney Bowes estimates of SFT over those by Experian, which appear too low.

6.3.4 In Table 6.1, the increases in the proportions to 2027 (rising to 28.5% after adjustment) are also broadly based on Pitney Bowes for the UK, with the rate of increase slowing after 2022. Our view is that the proportion of internet spending in the Council area will probably catch up with the national average. Note that these proportions are substantial, and reflect the growing popularity of internet shopping, which is reducing the need for conventional retail floorspace.

6.3.5 The findings of the household survey (Q15) are broadly consistent with the direction of this national forecast. About 54% of respondents said that they would continue to use the internet, much as at present. A further 23% indicated that they intended to use it more often than at present.

6.3.6 Forecasts of the total comparison expenditure potential of the residents of each catchment area are shown in Table 6.2. The growth to 2027 is the result of combining projected population growth with the forecast growth in expenditure per capita. The forecast growth is much higher than the forecast growth in convenience expenditure.

Table 6.1 **Lisburn & Castlereagh City Council area: comparison expenditure per capita per annum (in 2016 prices)**				
	2015 £	2017 £	2022 £	2027 £
Council area	3,634	3,905	4,416	5,173
**excluding special forms of trading*				
Council area		*3,202*	*3,268*	*3,698*

Note

Original Experian figures for 2015 are in 2015 prices. These have been adjusted to 2016 prices by a factor of 0.99394 from *Experian Retail Planner Briefing Note 15, Appendix 4b- dated December 2017*

The grow th rates derive from the above Experian document, Appendix 4a.

	2015-17	2017-22	2022-27
Grow th rates	1.0745	1.1308	1.1714

*An allowance for special forms of trading (SFT- mainly internet spending) is deducted so that the exenditure per capita relates to sales from conventional retail floorspace.

Experian publish their ow n estimates of the % deduction for SFT for the UK in their *Retail Planner Briefing Note 15, Figure 5 - 2017* .

Deductions for SFT	*-14.8%*	*-17.2%*	*-17.6%*

Pitney Bow es has also published estimates of the proportions of SFT in their recent Retail Expenditure Guide 2017/18:

	-21.1%	-27.2%	-30.1%

The Pitney Bowes estimates appear much closer to the findings of household surveys elsewhere in the UK. The household survey in the Lisburn & Castlereagh Council area indicated a proportion of 17.4% currently. Pitney Bow es caution that their estimated proportions could be lower, as there is an overlap between non-store sales and store-related internet sales, but no-one knows what the reduction should be. In our view, it is reasonable to assume a similar proportion as the survey results for 2017, then apply proportions slighlty less than the Pitney Bowes figures for 2022 and 2027, assuming use of internet shopping catches up with the national average proportions in the future. See applied proportions below:

	-18.0%	**-26.0%**	**-28.5%**

Table 6.2 **Residents' comparison expenditure potential (in 2016 prices)** ***Excluding SFT (special forms of trading- mostly internet spending)***					
Catchment areas	2017 £ million	*growth 2017-22* *£ million*	2022 £ million	*growth 2022-27* *£ million*	2027 £ million
Lisburn	317.8	*21.4*	339.2	*60.2*	399.4
Forestside	77.7	*5.2*	82.9	*14.7*	97.6
Dundonald	62.0	*4*	66.1	*11.7*	77.9
Total Council area	457.4	*30.8*	488.2	*86.7*	574.9

Note

From Table 2.1 and 6.1. Figures are rounded.

6.4 Comparison shopping patterns- market shares

6.4.1 Information on comparison shopping patterns by catchment area was collected by the household survey. The method is explained in section 4, which is the same as for convenience shopping.

6.4.2 For each of the five categories of comparison goods in the questionnaire, the respondents were asked to *identify where they mainly visited to buy* these goods (Q7-Q11). Respondents could identify up to two destinations (or internet) for each category. The results were weighted and combined to reveal the shopping patterns for all comparison goods, as shown in Table 6.3 with the supporting information in Appendix 6.

6.4.3 Note that the proportions in Table 6.3 exclude SFT (internet/ mail order), in order to show physical destinations only and to

Table 6.3
Lisburn & Castlereagh City Council area residents- comparison shopping patterns (Q7-Q11 combined) in 2016

	Origin of shoppers			
Catchment areas	Lisburn catchment	Forestside catchment	Dundonald catchment	Total Council area
Destination				
Lisburn catchment shops	61%	8%	0%	46%
Forestside catchment shops	1%	38%	12%	8%
Dundonald catchment shops	0%	0%	7%	1%
Outside Council area	38%	54%	81%	45%
Total	100%	100%	100%	100%

Source: NEMS household shopping interview survey 2016 for the Council
The above data relates to the w eighted survey data and filtered to remove don't know s, varies, internet and mail order
Weighting of the five goods categories to provide patterns for all comparison goods is explained in Appendix 6

achieve compatibility with the expenditure per capita data, which excludes SFT. Thus, the table highlights the shopping patterns between the catchment areas, and with centres outside the Council area.

6.4.4 The household survey reveals that, for comparison shopping, Lisburn draws limited trade from residents of the Forestside catchment and a minimal level from Dundonald residents.

6.4.5 Among respondents from the Lisburn catchment area, 61% mainly shop for comparison goods at Lisburn and Sprucefield, with 38% mostly shopping outside the Council area for these goods. In the Forestside catchment area, 38% mainly did their comparison shopping at Forestside, with 54% mainly shopping at centres outside the Council area. Only 8% identified Lisburn and Sprucefield.

6.4.6 In the Dundonald catchment, 81% of residents mostly did their comparison shopping in centres outside the Council area, with only 7% shopping locally. The survey indicated that Lisburn and Sprucefield were not significant destinations for comparison goods shopping by residents of the Dundonald catchment.

6.4.7 The graphs in Figure 6.1 illustrate the most popular destinations by goods type by residents of each catchment area, including internet spending.

6.4.8 The implications of the comparison shopping patterns identified in Table 6.3 is that consideration of future opportunities for comparison retail development should include Forestside separately from Lisburn. Dundonald is too small as a centre for comparison shopping to provide the platform needed to support major additions of comparison floorspace.

6.5 Comparison expenditure and turnover by catchment area

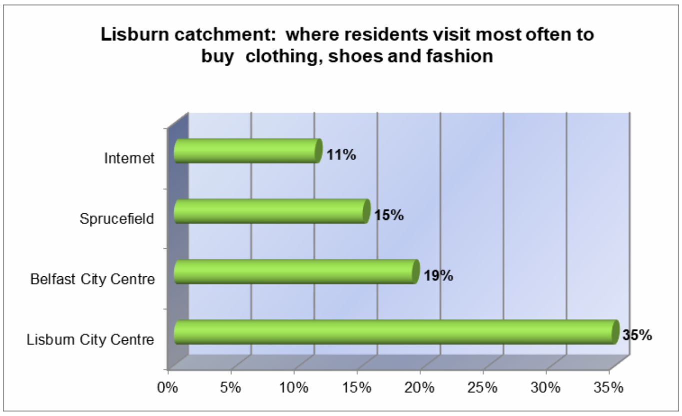
6.5.1 Like the analysis in section 4, the relationship between total expenditure and turnover in each catchment area is defined simply as: *residents' expenditure potential plus inflows, less outflows equals total turnover*.

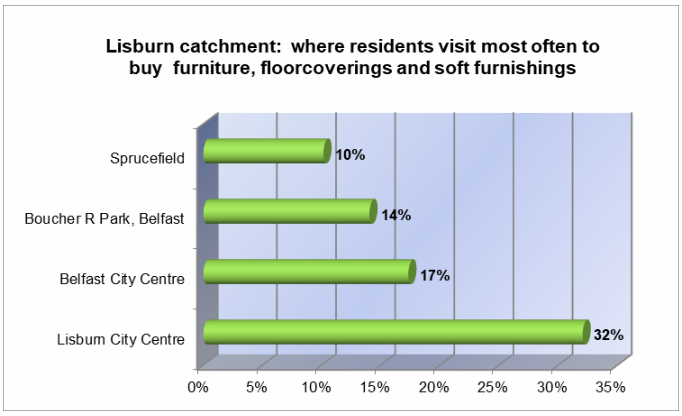
6.5.2 To achieve estimates of the expenditure inflows to the Council area, we have drawn on the results of the street- shopper interviews in Lisburn City Centre and at Sprucefield. The calculations are shown in Appendix 7, which identify the proportions of respondents from outside the Council area, whose main reason for visiting the centres was to shop for non-food goods.

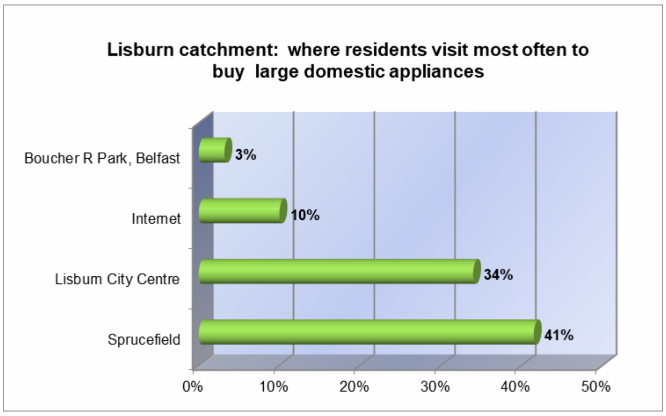
6.5.3 From this, their contribution to the comparison turnover of these centres was estimated and expressed as a proportion of the Lisburn catchment residents' expenditure potential. Of note, evidence from the street shopper surveys in the City Centre and at Sprucefield, indicate that around 50% of the turnover of Sprucefield is generated by customers from beyond the Council area, which reveals its function as a regional shopping centre. This compares to 30% in Lisburn City Centre.

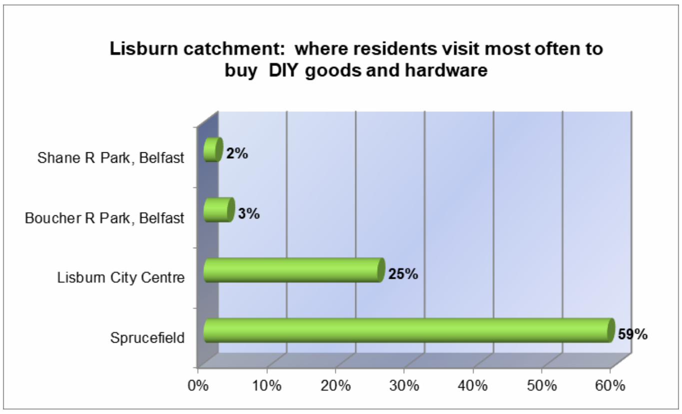
Figure 6.1 Comparison shopping- most frequently visited destinations (including internet) by residents of each of the three catchment areas- household survey

Goods categories graphs exclude *don't knows, don't buy, varies*









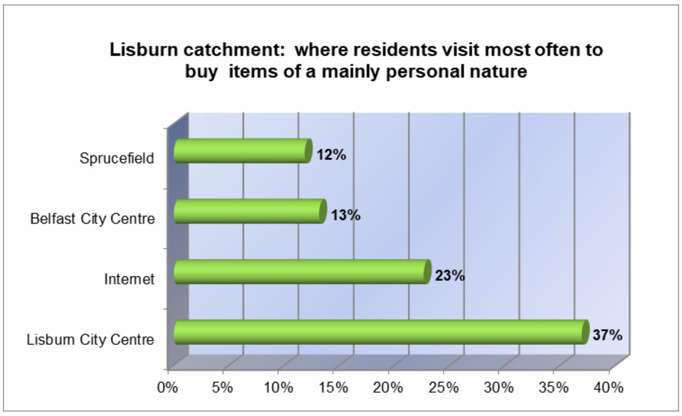
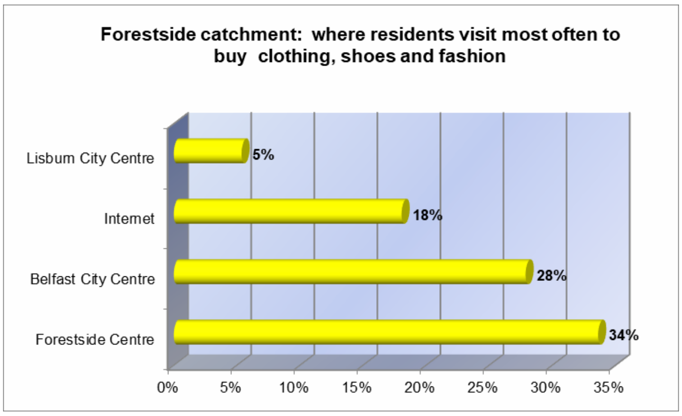
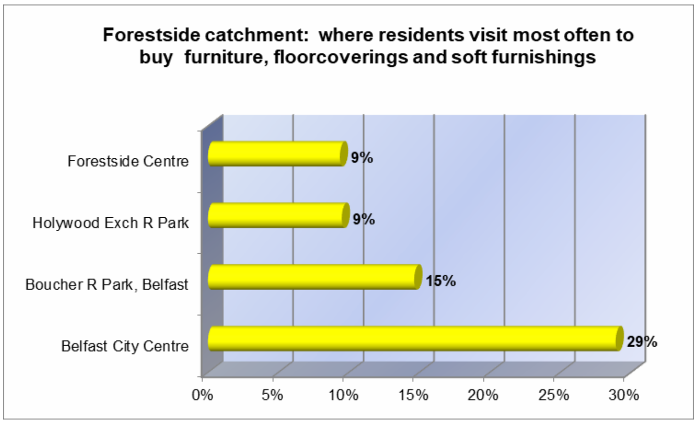
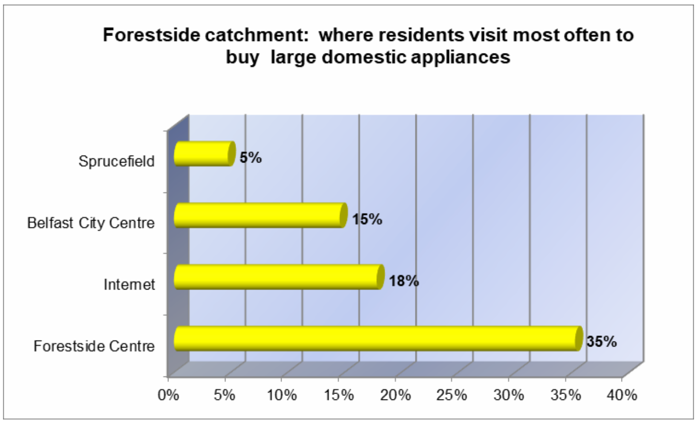


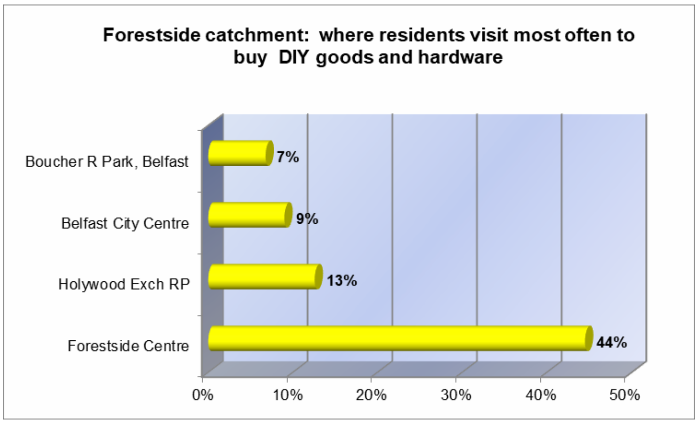
Figure 6.1 *continued*-Comparison shopping- most frequently visited destinations (including internet) by residents of each of the three catchment areas- household survey

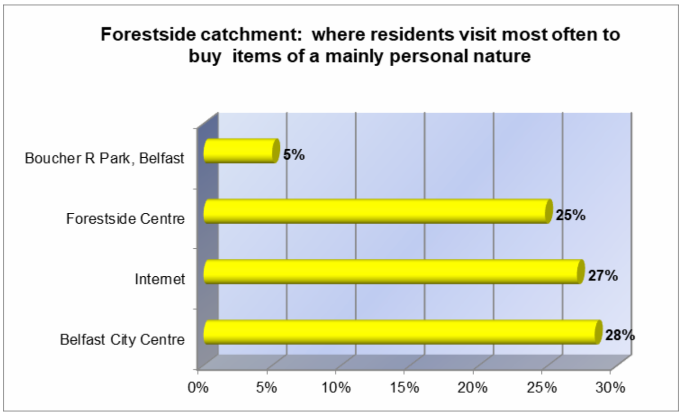
Goods categories graphs exclude don't knows, don't buy, varies

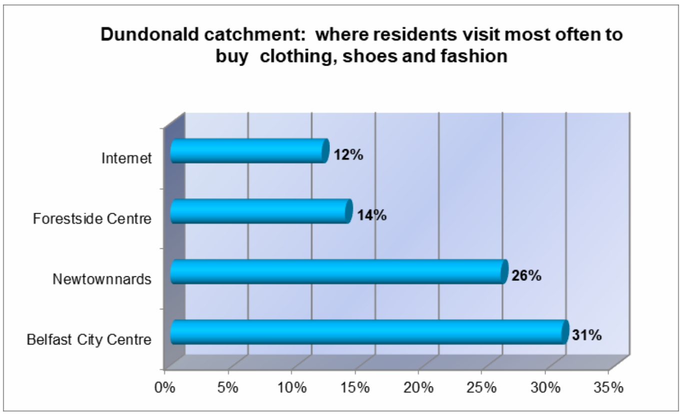


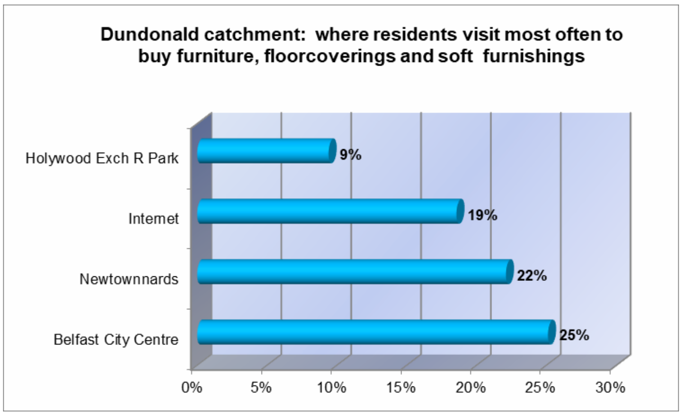


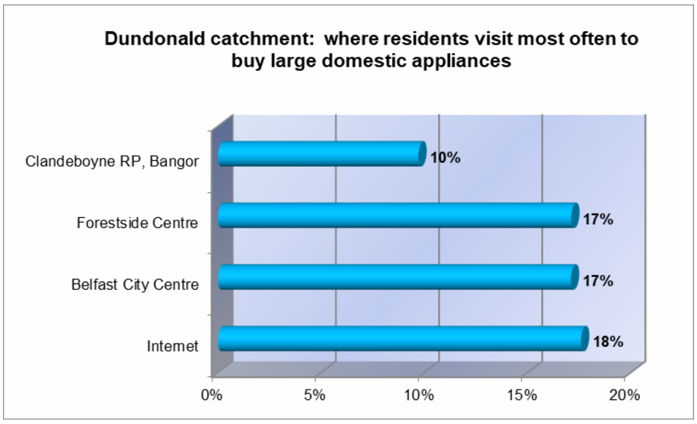


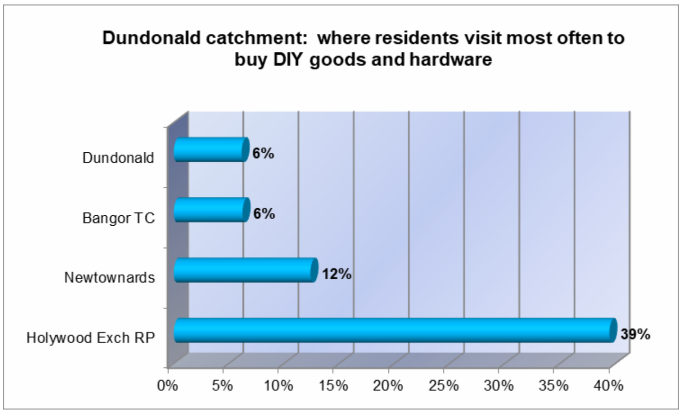





Dundonald catchment: where residents visit most often to buy clothing, shoes and fashion
Internet
Forestside Centre
Newtownnards
Belfast City Centre
12%
14%
26%
31%
0%
5%
10%
15%
20%
25%
30%
35%


Dundonald catchment: where residents visit most often to buy furniture, floorcoverings and soft furnishings
Holywood Exch R Park
Internet
Newtownnards
Belfast City Centre
9%
19%
22%
25%
0%
5%
10%
15%
20%
25%
30%


Dundonald catchment: where residents visit most often to buy large domestic appliances
Clandeboyne RP, Bangor
Forestside Centre
Belfast City Centre
Internet
10%
17%
17%
18%
0%
5%
10%
15%
20%


Dundonald catchment: where residents visit most often to buy DIY goods and hardware
Dundonald
Bangor TC
Newtownards
Holywood Exch RP
6%
6%
12%
39%
0%
5%
10%
15%
20%
25%
30%
35%
40%

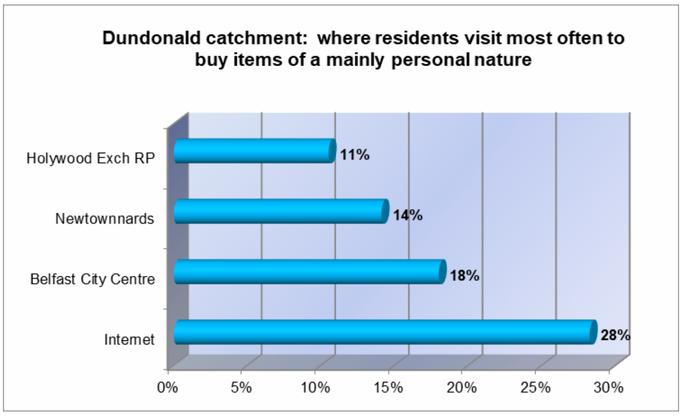

Dundonald catchment: where residents visit most often to buy items of a mainly personal nature
Holywood Exch RP
Newtownnards
Belfast City Centre
Internet
11%
14%
18%
28%
0%
5%
10%
15%
20%
25%
30%

Table 6.4
Lisburn catchment area comparison expenditure and turnover 2017 (in 2016 prices)

	%	2017 £million	2022 £million	2027 £million
Main catchment residents' expenditure potential		317.8	339.2	399.4
Add: inflows from rest of Council area	2%	6.5	6.9	8.2
inflows from outside Council area	35%	111.8	119.3	140.5
Less: outflows	-39%	-123.7	-132.1	-155.5
Retained expenditure (turnover)		312.3	333.3	392.6

Note
Inflow s and outflow s from Appendices 6 & 7

Table 6.5
Forestside catchment area comparison expenditure and turnover 2017 (in 2016 prices)

	%	2017 £million	2022 £million	2027 £million
Main catchment residents' expenditure potential		77.7	82.9	97.6
Add: inflows from rest of Council area	14%	10.9	11.7	13.7
inflows from outside Council area	34%	26.4	28.2	33.2
Less: outflows	-62%	-47.9	-51.1	-60.2
Retained expenditure (turnover)		67.1	71.6	84.4

Note
Inflow s and outflow s from Appendices 6 & 7

Table 6.6
Dundonald catchment area comparison expenditure and turnover 2017 (in 2016 prices)

	%	2017 £million	2022 £million	2027 £million
Main catchment residents' expenditure potential		62.0	66.1	77.9
Add: inflows from rest of Council area	0%	0.1	0.2	0.2
inflows from outside Council area	2%	1.5	1.6	1.9
Less: outflows	-93%	-57.8	-61.6	-72.6
Retained expenditure (turnover)		5.8	6.2	7.4

Note
Inflow s and outflow s from Appendices 6 & 7

Table 6.7
Council area comparison expenditure and turnover 2017 (in 2016 prices)

	%	2017 £million	2022 £million	2027 £million
Council residents' expenditure potential		457.4	488.2	574.9
Add:				
inflows from outside Council area	31%	139.7	149.1	175.6
Less: outflows	-45%	-206.1	-220.0	-259.1
Retained expenditure (turnover)		385.3	411.2	484.3

Note
Inflow s and outflow s from Appendices 6 & 7

6.5.4 In the Forestside catchment, it was estimated that 50% of the comparison turnover of the centre came from outside the area; principally from the Belfast suburbs, as the shopping centre is right on the border of the Council area.

6.5.5 Tables 6.4 to 6.7 show the survey based comparison expenditure and turnover relationships for each catchment area and for the Council area in 2017, 2022 and 2027.

6.6 Comparison floorspace and turnover 2017

6.6.1 The current distribution of comparison floorspace in the Council area and in the three catchment areas is shown in Table 6.8. The retail floorspace data is from the same sources described in section 4 for convenience floorspace.

6.6.2 The comparison turnover levels among the various towns are controlled to the survey- based totals for each catchment area, from the shopping patterns. The turnover/ floorspace ratios applied to Sprucefield derive from average levels published in the Retail Rankings 2017, as shown in Appendix 8. For comparison turnover in the supermarkets, a similar method has been applied.

6.6.3 For other shops in the smaller centres in the Lisburn catchment, the applied turnover ratios derive from apportionment from the City Centre turnover ratio. In the Forestside catchment, the turnover ratio applied to Carryduff is an apportionment of the turnover ratio for the Forestside Centre.

6.6.4 Unlike convenience retailing, comparison retailing is not dominated by a few participants, so the concept of over/ under-trading has limited application for comparison retailing. The exceptions are retail parks, where the published average company turnovers are available and can be applied.

Table 6.8
Lisburn & Castlereagh City Council areae: comparison floorspace and turnover, 2017 (in 2016 prices)

	Floorspace sq m		Av. turnover	Turnover	Market share
	gross	net	ratio £/sq m	£million	w ithin catchment
LISBURN CATCHMENT					
Lisburn City Centre	48,170	31,311	5,930	185.7	59%
Sprucefield Shopping Centre - see Appendix 8	34,920	27,936	4,026	112.5	36%
Tesco, Bentrim Rd, Lisburn (total 5,625 sq m gross)-15% comp	844	506	6,152	3.1	1%
Sainsbury's, Sprucefield (total 8,330 sq m gross)-20% comp	1,666	1,000	2,520	2.5	1%
Lidl, Bentrim Rd, Lisburn (1,595sq m gross total) 15% comp	239	179	4,995	0.9	0%
Lidl, Moira Rd, Lisburn (1,326sq m gross total) 15% comp	199	149	4,995	0.7	0%
Hillsborough shops (9 units at av 150 sq m each)	1,350	810	2,965	2.4	1%
Moira shops (17 units at av 150 sq m each)	2,550	1,530	2,965	4.5	1%
Total				312.3	100%
FORESTSIDE CATCHMENT					
Forestside Shopping Centre	19,860	13,902	3,843	53.4	80%
Sainsbury's, Forestside Centre (total 5,690 sq m gross)- 15% comp	854	512	2,520	1.3	2%
Tesco Extra, Newtownbreda-total 7,741sq m gross (37% comp)	2,864	1,704	6,152	10.5	16%
Carryduff shops (8 units at av 150 sq m each)	1,200	720	2,690	1.9	3%
Total				67.1	100%
DUNDONALD CATCHMENT					
B&M (total 1,500 sq m gross)-75% comp	1,125	900	3,696	3.3	57%
Other Dundonald shops (10 units at av 100 sq m each)	1,000	600	2,229	1.3	23%
ASDA, Upper Newtownards Rd (total 3,580 sq m gross)-10% comp	358	215	5,520	1.2	20%
Total				5.8	100%
Total Lisburn & Castlereagh				385.3	

Note
Gross floorspace based on the follow ing sources: Goad data, planning applications, and measurements from Google Maps.
Average supermarket turnover ratios based on the Retail Ranking 2017 and other Mintel research on supermarket operator floorspace, adjusted to remove petrol sales, plus an allow ance for VAT added- in 2016 prices.
Floorspace in the small tow ns is based on a street count of units w ith an average unit size applied, from Goad surveys of comparison shops in small tow ns elsew here. Dundonald has mostly very small units.

6.7 Planning consents

6.7.1 The outstanding major planning consents for comparison retail floorspace in the Council area are shown in Table 6.9.

Table 6.9
Proposed comparison floorspace in the Council area: planning consents 2017 (in 2016 prices)

	Floorspace sq m		Turnover	Turnover
	gross	net	ratio £/sq m	£million
Planning consents included in the capacity study				
Ballinderry Rd, Lisburn -former Public House site S/2012/0153/O & LA05/2016/1054/RM Supermarket- total 2,508 sq m gross, 1,171 sq m net conv, 502 sq m net comp i.e 70% convenience floorspace and 30% comparison. Plus kiosk and pfs **Comparison floorspace element*	752	505	7,571	3.8
Unit 1, Drumkeen Retail Park- Y/2015/0002/F- development of 1,373 sq m plus 825 mezzanine to accommodate TK Maxx- consent	2,198	1,649	4,428	7.3
2 Units, Laganbank Retail Park, Lisburn- Open Class 1 consent LA05/2015/0633. Unit A- 2,046 sq m incl. mezz. Unit B 930 sq m. Combined 2,976 sq m. Estimated occupiers- possibly comparison goods retailers	2,976	2,232	3,000	6.7
Carryduff Shopping Centre LA05/20161245/F- consent for redevelop site for mixed use development including 2,514 sq m retail- (for Lidl)- est 80% conv and 20% comp *Comparison floorspace element*	503	302	6,995	2.1

Note
Estimated turnover of the consents are based on company averages from the 2017 Retail Rankings
*The reserved matters consent indicatess that the occupier could by Home Bargains (a mixed goods retailer).

7 Comparison expenditure capacity

7.1 Introduction

7.1.1 This section provides estimates of the spare comparison retail expenditure capacity that could service new retail floorspace in each of the three catchment areas, plus the Council area as a whole. The forecasts of spare capacity are for the periods 2017-22, 2022-27 and for the total ten-year period 2017-27, after allowing for the existing planning commitments.

7.1.2 As explained in section 5, spare retail capacity can exist in the following forms, as previously explained:

- Over-trading - see text below
- Growth in retained expenditure (turnover)
- Potential to claw back expenditure leakage
- Potential to attract new trade into the area
- 'Acceptable' levels of impact

7.1.3 A forecast range of estimated capacity is provided for comparison expenditure in this section, with a *high* and a *low* estimate, on a similar principal of providing a range, as for forecasts of convenience capacity. Again, as a reminder, **more weight should be given to the expenditure capacity figures than the equivalent floorspace**, because retailer performance and formats varies widely.

7.1.4 Separate forecasts of spare comparison capacity for each catchment area are needed because the Council area is wider than the Lisburn main catchment and the two smaller catchments have a limited relationship with Lisburn for comparison shopping.

7.2 Spare comparison expenditure capacity

7.2.1 The forecasts of spare comparison expenditure capacity are shown in Tables 7.1 to 7.4. Forecasts beyond 2022 have a greater level of uncertainty, so should be treated with a degree of caution.

7.2.2 Over-trading above average levels is generally less of an issue in comparison retailing, because the sector is not dominated by a few major players- but can be applied in retail parks.

7.2.3 There is considerable uncertainty over the extent to which internet retailing will expand. Widespread shop closures on high streets generally, are evidence of changing shopping habits among shoppers.

7.2.4 Small changes in the estimated proportions of internet spending can make considerable differences to the comparison expenditure capacity forecasts. The findings of the household survey suggest that applying this approach to create a range is not ideal for this study area. First, the proportion of internet spending has been shown to be currently lower than the national average, but we have allowed for it to catch up. Adding another layer of assumed change could appear contrived. Second, two of the catchment areas defined by the survey are quite small, with high levels of expenditure leakage, so assumed changes in the proportions of internet spending may have less influence than potential to claw back leakage, for example.

7.2.5 Therefore, our selection of the range of forecasts for comparison expenditure capacity is based on the same method applied for convenience expenditure capacity.

7.3 Forecast capacity- main case

7.3.1 In this section, the forecasts of spare comparison capacity relate to the situation where current market trends continue broadly based on the present. This our **main case.** In addition, two other scenarios are presented. These relate to the potential to support a major expansion of Sprucefield along the lines proposed 2009 and earlier.

7.3.2 **Low estimate-** of forecast spare comparison expenditure capacity comprises retained expenditure growth in each catchment area, plus over-trading (retail parks) less the estimated turnover of current retail planning consents.

7.3.3 In the *Lisburn catchment* -under the low estimates, there is predicted spare capacity up to 2022 which would support the levels of retail development shown in Table 7.1. There is a material increase in forecast capacity from

2022-27, based on forecast expenditure growth. It could potentially accommodate a substantial increase in comparison retail floorspace in the catchment area, mostly in the City Centre and Sprucefield.

7.3.4 The over-trading at Sprucefield, which contributes to these forecasts, suggests that it is fair to consider that perhaps half the spare expenditure capacity may relate to potential additions to Sprucefield. The actual distribution between Sprucefield and Lisburn will also depend on the market and on planning decisions. The equivalent retail floorspace is for broad guidance only, as the levels will be greater if a lower turnover/floorspace ratio is applied. For example, the turnover/floorspace ratio is lower at Sprucefield compared to the City Centre, so a greater level of floorspace could be supported there by the same expenditure.

7.3.5 *In the Forestside catchment,* there is no anticipated spare capacity up to 2022, but a small increase from 2022-27 (Table 7.2).

7.3.6 *In the Dundonald catchment*, the forecast spare capacity is minimal, essentially because of the small scale of the catchment and its high levels of expenditure outflow to larger centres- see Table 7.3

7.3.7 **High estimate-** includes the low estimate plus an allowance for the potential to claw back expenditure leakage and attract new trade into the catchment areas.

7.3.8 In our opinion, the current shopping patterns (inflows and outflows) of the main catchment areas are unlikely to change much under our main case, unless things change- (see Sprucefield scenarios later in the text).. Forecast growth will mainly service new development opportunities, rather than any major claw back of leakage.

7.3.9 For the *Lisburn catchment*, only a small increase in the potential to claw back of expenditure outflows is anticipated under the main case. Prospects for attracting significant additional new comparison expenditure into the catchment appear very limited under our main case. Lisburn, with Sprucefield, represents a very substantial level of retailing, which makes any major shift in the shopping patterns over the next few years rather unlikely.

7.3.10 Indeed, there is no evidence of substantial untapped retail market demand to locate in the Lisburn catchment which contradict these assumptions, under the main case. Therefore, under the high estimate, the predicted spare capacity up to 2022 and up to 2027 are at the levels shown in Table 7.1.

7.3.11 The implications of the study findings are that the forecast expenditure capacity would support additional new comparison retail floorspace in the City Centre and at Sprucefield. Initially, the forecast capacity will be limited over the next five years, but will increase significantly after that.

7.3.12 *In the Forestside catchment*, there would be potential to claw back a higher proportion of leakage, simply because the Forestside Centre is so much smaller than Lisburn/ Sprucefield- Table 7.2. This would not represent a high amount though. Most likely, it could support minor additions to the existing Centre and retail park. The Centre would have to be very much larger to achieve greater claw back of leakage, and its relatively small catchment, and location by Belfast, would not support that.

7.3.13 Although Forestside Centre is on the Council border with Belfast, we have not assumed potential for material attraction of new trade because most customers to the north are more likely to continue visiting Belfast City Centre and other retail locations in the city.

7.3.14 *For the Dundonald catchment*, a small increase in spare capacity is anticipated under the high estimate, but it would only support minor additions to the existing offer- see Table 7.3. Dundonald is too small to support much in the way of additional comparison retailing, against the attractions of the larger centres of Belfast and Newtownards.

7.3.15 Table 7.4 summarises the forecast spare comparison expenditure for the Council area to 2027, but as it is not a single market, the forecasts for the three catchment areas are more relevant for planning purposes.

Table 7.1
Lisburn catchment area: forecast spare comparison expenditure capacity (in 2016 prices)

			2017-22 £million	2022-27 £million	2017-27 £million
(a) Growth in retained expenditure (turnover)- Table 6.4			21.0	59.2	80.2
(b) Over-trading above average levels at Sprucefield (Appendix 8)			18.7		18.7
(c) Less planning consents: - Table 6.9			-10.5		-10.5
Low estimate	(a-b)		**29.2**	**59.2**	**88.4**
(d) Add: potential to reduce outflow	*2022*	*2027*			
Outflow £million- Table 6.4 (39%)	-132.1	-155.5			
To centres outside Council area (38%)-Table 6.3	-128.2	-148.4			
Potential to claw back up to 5% of leakage to stores outside Council area			6.4	7.4	13.8
(e) Add:potential to increase inflow- Table 6.4					
Assume negligible					
High estimate	(a+b-c+d+e)		**35.7**	**66.6**	**102.3**
Equivalent comparison floorspace			£ per sq m	£ per sq m	
Turnover/ floorspace ratio			6,329	7,453	
			sq m net	sq m net	sq m net
Low			*4,600*	*7,900*	12,500
High			*5,600*	*8,900*	14,500

Note
Gross equivalent floorspace estimates have not been show n, as net /gross formats vary w idely. *Figures are rounded.*
* The turnover ratio derives from the current turnover ratio in Lisburn City Centre £5,930 per sq m
Turnover ratio is increased to relate to 2022 and 2027, based on % turnover grow th in the Council area-Table 6.7

Table 7.2
Forestside catchment area: forecast spare comparison expenditure capacity (in 2016 prices)

			2017-22 £million	2022-27 £million	2017-27 £million
(a) Growth in retained expenditure (turnover)- Table 6.5			4.5	12.7	17.2
(b) Less planning consents: - Table 6.9			-9.4		-9.4
Low estimate	(a-b)		**-4.9**	**12.7**	**7.8**
(d) Add: potential to reduce outflow	*2022*	*2027*			
Outflow £million- Table 6.5 (62%)	-51.1	-60.2			
To centres outside Council area (54%)-Table 6.3	-44.4	-52.2			
Potential to claw back up to 15% of leakage to stores outside Council area			6.7	7.8	14.5
(e) Add:potential to increase inflow- Table 6.5					
Assume negligible					
High estimate	(a+b-c+d+e)		**1.8**	**20.6**	**22.3**
Equivalent comparison floorspace			£ per sq m	£ per sq m	
Turnover/ floorspace ratio			4,101	4,830	
			sq m net	sq m net	sq m net
Low			*-1,200*	*2,600*	1,400
High			*400*	*4,300*	4,700

Note
Gross equivalent floorspace estimates have not been show n, as net /gross formats vary w idely. *Figures are rounded.*
* The turnover ratio derives from the current turnover ratio in Forestside Centre £3,843 per sq m
Turnover ratio is increased to relate to 2022 and 2027, based on % turnover grow th in the Council area-Table 6.7

Table 7.3 **Dundonald catchment area: forecast spare comparison expenditure capacity (in 2016 prices)**					
			2017-22 £million	2022-27 £million	2017-27 £million
(a) Growth in retained expenditure (turnover)- Table 6.6			0.4	1.1	1.5
(b) Less planning consents: - Table 6.9 (none)			0		0
Low estimate	(a-b)		**0.4**	**1.1**	**1.5**
(d) Add: potential to reduce outflow	*2022*	*2027*			
Outflow £million- Table 6.6 (93%)	-61.6	-72.6			
To centres outside Council area (81%)-Table 6.3	-53.5	-63.0			
Potential to claw back up to 5% of leakage to stores outside Council area			2.7	3.1	5.8
(e) Add:potential to increase inflow- Table 6.6					
Assume negligible					
High estimate	(a+b-c+d+e)		**3.1**	**4.3**	**7.3**
Equivalent comparison floorspace			£ per sq m	£ per sq m	
Turnover/ floorspace ratio			2,988	3,519	
			sq m net	sq m net	sq m net
Low			*100*	*300*	400
High			*1,000*	*1,200*	2,200
Note					
Gross equivalent floorspace estimates have not been show n, as net /gross formats vary w idely. *Figures are rounded.*					
* The turnover ratio is estimated for new units in Dundonald			£2,800	per sq m	
Turnover ratio is increased to relate to 2022 and 2027, based on % turnover grow th in the Council area-Table 6.7					

Table 7.4 **Council area total : forecast spare comparison expenditure capacity (in 2016 prices)**			
	2017-22 £million	2022-27 £million	2017-27 £million
Low forecast			
Lisburn catchment	29.2	59.2	88.4
Forestside catchment	-4.9	12.7	7.8
Dundonald catchment	0.4	1.1	1.5
Total	**24.7**	**73.0**	**97.8**
	sq m net	sq m net	sq m net
Equivalent floorspace	*3,500*	*10,800*	*14,300*
High forecast			
Lisburn catchment	35.7	66.6	102.3
Forestside catchment	1.8	20.6	22.3
Dundonald catchment	3.1	4.3	7.3
Total	**40.5**	**91.4**	**131.9**
	sq m net	sq m net	sq m net
Equivalent floorspace	*7,000*	*14,400*	*21,400*
Note			
Based on rounded totals in Tables 7.1 to 7.3			

7.4 Sprucefield expansion

7.4.1 Sprucefield is the only regional shopping centre in Northern Ireland. In 2009, there was a planning application (S/2009/1045/F) for 49,434 sq m gross of retail floorspace, plus 1,580 sq m for restaurant use, described as Sprucefield Phase 2. Originally intended to accommodate a major national department store and other retailing, the scheme did not progress for various planning, administrative and legal reasons.

7.4.2 Overall, this author considers that the forecasts around the lower end of the range may be more realistic over the ten-year period, taking retail trends into account; although this could change.

7.4.3 In our assessment of the potential future retail capacity for the emerging new LDP, broad appraisal is provided here on whether a similar scheme could be supported at Sprucefield by retail expenditure, as an exception to the main case presented in this study so far.

7.4.4 Two hypothetical development scenarios are presented. **Scenario 1** assumes a scheme including 50,000 sq m gross of mainly comparison retail floorspace, anchored by a major department store with other retailers. **Scenario 2** assumes a 50,000 sq m development divided into 25,000 sq m gross retailing and 25,000 sq m leisure. It is envisaged that the leisure element would probably include a cinema, restaurants and other attractions.

7.4.5 In the current market, incorporation of leisure is of fundamental importance in support very large retail developments. To that extent, Scenario 2 is more realistic.

7.5 Implications for comparison expenditure patterns

7.5.1 Table 7.5 provides estimates of the comparison floorspace and turnover of the two scenarios. In the opinion of this study, both scenarios would in fact alter the shopping patterns relating to the Lisburn catchment area.

7.5.2 Unlike our main case, developments on this scale would lift the attraction of shoppers to Sprucefield and greatly strengthen its function as a regional shopping centre. It would attract greater inflows of expenditure, while capturing more expenditure leakage by residents.

7.6 Scenario 1

7.6.1 In theory, it is possible that up to half the turnover of this scenario could be serviced by additional re-capture of leakage and additional increased inflows over the current patterns, amounting to some £56 million. The level of existing outflows and inflows in Table 6.4 suggest this possibility. Thus, the balance would be drawn from the forecasts of capacity in Table 7.1, while leaving some capacity to service new floorspace in Lisburn City Centre.

7.6.2 In reality, expansion of Sprucefield to this level would most likely diminish retail market interest in locating in the City Centre. It would also divert trade from the City Centre. Unless there is an exceptional retail opportunity underpinning the potential expansion of Sprucefield, Scenario 1 would create a risk for the City Centre without obvious benefits.

7.7 Scenario 2

7.7.1 In a similar way, Scenario 2 could be part serviced by increased inflows and clawback of leakage, although in lower proportions than Scenario 1, because of its smaller size. It is estimated that up to one third of the turnover of Scenario 2 could be serviced by additional re-capture of leakage and additional increased inflows over the current patterns, amounting to around £20 million.

7.7.2 The balance would be drawn from the forecasts of capacity in Table 7.1, which could be readily be accommodated under the high and low forecasts. There would still be risk of some deflection of potential retailer interest away from the City Centre, but not to nearly the extent as under Scenario 1.

7.7.3 In the event of any major application to expand Sprucefield appear in the future, the applicants would require providing the Council with a supporting retail impact assessment to demonstrate that the vitality and viability of the City Centre, and other established town centres, would not be materially threatened.

Table 7.5
Sprucefield Regional Shopping Centre expansion scenarios- comparison floorspace (hypothetical)

	Floorspace sq m		Turnover	Turnover
	gross	net	ratio £/sq m	£million
Scenario 1 Assumes a 50,000 sq m gross development, incorporating a major national department store and other retailers. Estimated 85% comparison floorspace in the form of a covered shopping mall (guestimate)	42,500	27,625	4,026	111.2
Scenario 2 Assumes a 50,000 sq m gross development, incorporating 25,000 sq m gross retail floorspace and 25,000 sq m gross leisure Estimated at 90% comparison floorspace for the retail element. Again possibly as a shopping mall	22,500	14,625	4,026	58.9
Note Estimated turnover/ floorspace ratio based on current ratio for Sprucefield in Table 6.8				

8 Conclusions for the LDP Preferred Options

8.1 The forecasts

8.1.1 The study contains forecasts of spare retail expenditure capacity for the next five (2017-2022) and ten years (2022-27). The forecasts for the second period are subject to greater uncertainty owing to the longer time from the present.

8.1.2 Separate forecasts are provided for both convenience and comparison retail capacity relating to each of the three main catchment areas defined in this study. While forecasts are also provided for the Council area in total, these are less relevant because it is not a single retail market.

8.1.3 These forecasts provide broad brush guidance on the extent to which new retail floorspace could be accommodated in the town centres, including Lisburn City Centre and the out of centre commercial centre at Sprucefield, plus the smaller town centres in the Council area.

8.1.4 The forecasts are shown as a range, between a low and a high end, which is readily understandable and avoids the need for sets of complex sensitivity tests which can reduce clarity altogether. The low end is based on forests growth in expenditure and turnover in each catchment, after removing the estimated turnover of existing retail planning consents. The high end includes an allowance for clawback of some expenditure leakage to centres outside the Council area in addition.

8.2 Lisburn catchment

8.2.1 **Convenience retail expenditure capacity-**there is forecast spare capacity of up to about £43 million by 2027 at the low end of the range and up to £51 million at the high end. At the high end, the indicative equivalent floorspace would be around 4,200 sq m net. This could support a few medium and small store developments, including discount foodstore operators for example.

8.2.2 **Comparison retail expenditure capacity-** there is forecast spare capacity of up to nearly £88 million by 2027 at the low end of the range and up to £102 million at the high end. The indicative equivalent retail floorspace would be 12,500 sq m to 14,500 sq m net for developments in the Lisburn catchment area. The great majority of the forecast spare capacity will be after 2022.

8.2.3 The implications of the study findings are that the forecast expenditure capacity would support additional new comparison retail floorspace in the City Centre and at Sprucefield. Part of the forecast spare comparison expenditure relates to over-trading at Sprucefield. It is possible that up to half the forecast spare capacity may relate to Sprucefield and half to Lisburn, but much will depend on the market and on where planning consents are granted.

8.2.4 Initially, the forecast capacity will be limited over the next five years, but will increase significantly after that. In terms of equivalent retail floorspace, it is likely that proportionally more could be supported at Sprucefield, where the average turnover/floorspace ratios are likely to be lower than in the City Centre.

8.3 Forestside catchment

8.3.1 **Convenience retail expenditure capacity-**there is no forecast spare capacity over the next ten years. This would not rule out very small development proposals.

8.3.2 **Comparison retail expenditure capacity-** there is forecast spare capacity of up to nearly £8 million by 2027 at the low end of the range and up to £22 million at the high end. The indicative floorspace is 1,400 sq m net to 4,700 sq m net. Most likely, it could support minor additions to the existing Centre and retail park. The forecast capacity to 2022 is negligible, with most of the forecast growth from 2022-27.

8.4 Dundonald catchment

8.4.1 **Convenience retail expenditure capacity-** the forecasts show very minor levels of spare capacity, ranging from about £1 to £4 million up to 2027. This could support small shop developments and extensions, for example.

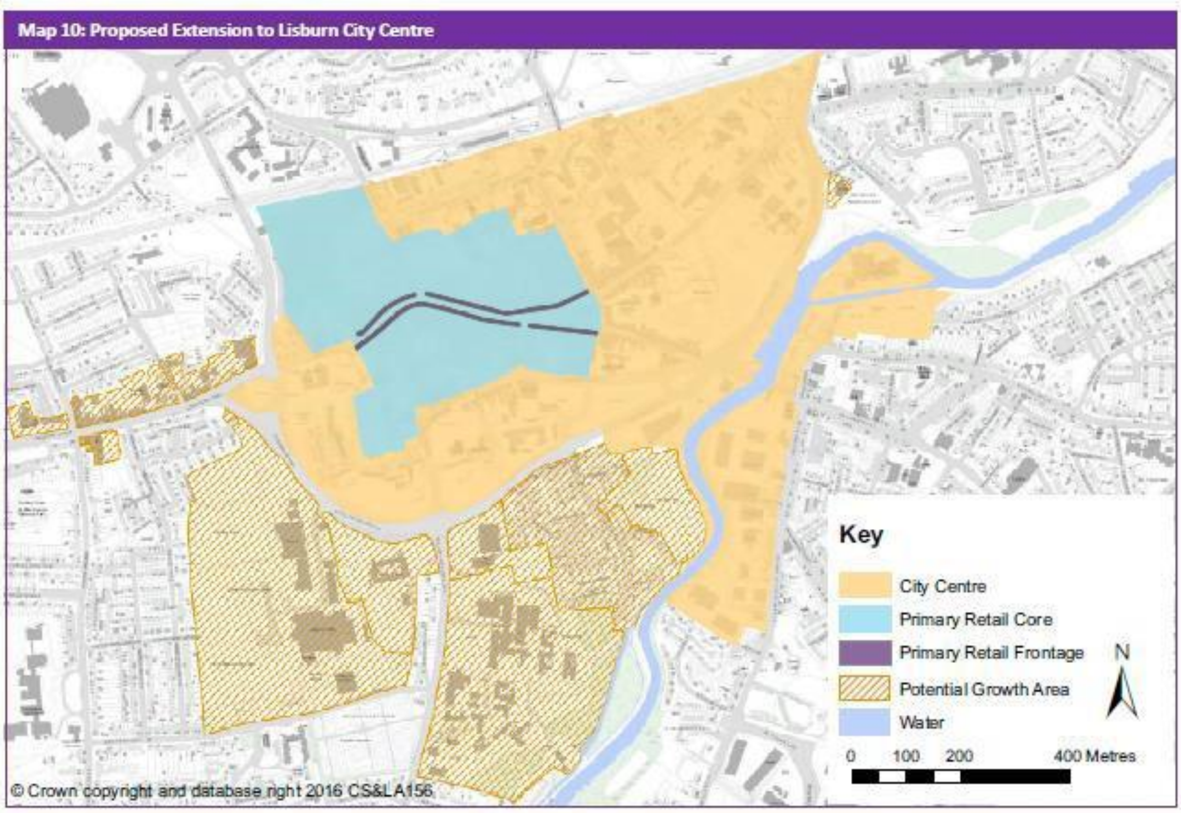
8.4.2 **Comparison retail expenditure capacity-** there is forecast spare capacity of up to about £7 million by 2027 at the high end (2,200 sq m net). Most likely, it could potentially support small shop developments and extensions.

8.5 Preferred Option 11A- extend City Centre boundary

8.5.1 The forecast spare expenditure capacity in this study gives support to the option to extend the City Centre boundary, as described in section 1 of this report, and illustrated below from Map 10 of the Council's Preferred Options report.

8.5.2 Realisation of the forecast expenditure capacity by future retail development will greatly depend on maintaining and improving the infrastructure in the City Centre while supporting the retail offer with leisure and other commercial uses. It is the combination of complementary uses which will best generate increased attraction of the public to the City Centre as a destination.

8.5.3 Furthermore, strengthening the combined retail and leisure sectors in the City Centre will be essential to compete successfully with the larger offer in Belfast and also to maintain its attraction in the circumstances of possible any future expansion of Sprucefield. More analysis of the opportunities for the City Centre is provided in the Town Centres Health Check document.



8.6 Preferred Option 12A

8.6.1 This option refers to retaining the town centre boundary of Carryduff and designating town centre boundaries in Hillsborough and Moira. Analysis of these issues is provided in the Town Centre Health Check document.

8.6.2 These are small towns where the level of potential market interest in the future is more likely to relate modest additions to the convenience retail offer, rather than significant comparison retail opportunities. There is scope for Hillsborough and Moira to draw a small share of the forecast capacity in the Lisburn catchment area. Carryduff has an existing consent for a Lidl store, and significant further additions are likely to be minor.

8.7 Preferred Option 13A- Sprucefield

8.7.1 The option refers to prioritisation of retaining and reinforcing Sprucefield in its role as a Regional Shopping Centre- see Map 15 from the Preferred Options paper..

8.7.2 The forecast levels of spare retail capacity over the next ten years support this preferred option under the 'main case' in section 7. Evidence from the research also demonstrates that Sprucefield is functioning as a regional shopping, with around half the customers originating from outside the Council area.

8.7.3 Our study also indicated that Sprucefield has potential to expand beyond our main case, under the assessments Scenario 1, and Scenario 2, where additional capacity would be generated by large scale expansion, including combination with leisure development. Any future planning application would require preparing a supporting retail impact assessment to demonstrate that the City Centre and other town centres would not be adversely affected.

8.8 Preferred Option 14A- Forestside and Dundonald

8.8.1 The preferred option refers to expansion of the boundary of the Forestside District Centre to include Drumkeen Retail Park and Homebase, on land to the north of the existing boundary.

8.8.2 The forecast retail capacity in the Forestside catchment would support modest additions to the comparison retail offer, and the existing retail uses on the proposed expansion site would support and consolidate Forestside in its role as a district shopping centre- see Map 14 from the Preferred Options paper. It is probably too small to attract any major retail development beyond the area indicated. There is little scope for any additional convenience retail floorspace.

8.8.3 The preferred option for Dundonald, which includes extending the centre boundary to include the park and ride site, is addressed in the Town Centre Health Checks document.

Appendix 1

Household survey zones and questions on shopping patterns

NEMS household survey 2017

The Council area was divided into six zones and quotas of interviews were undertaken in each zone. The zone map is shown overleaf

Lisburn & Castlereagh: Zone populations and interview quotas

		Population 2016		Interview quotas	
Zone	Name	Nos.	%	Proportion	Adjusted
1	Lisburn/ Sprucefield	75,198	53%	586	530
2	Forestside	15,093	11%	118	120
3	Dundonald	19,123	14%	149	150
4	Carryduff	8,883	6%	69	100
5	Hillsborough	12,511	9%	97	100
6	Moira	10,373	7%	81	100
Total Lisburn & Castlereagh Coumcil area		**141,181**	**100%**	**1,100**	**1,100**

Note:

Zones are based on groups of SOAs (super output areas) from NISRA- online interactive maps

The total for Zone 1 (Lisburn & Sprucefield) derives from the NISRA total for the Council area, less the data for Zones 2-5)

Questions asked in relation to shopping for convenience and comparison goods and internet shopping- to determine shopping patterns by zone. The zones were then assembled into three main retail catchment areas for this study

Q01	Where did you last do your MAIN FOOD shopping for the household?
Q01A	Which internet retailer did you use for your main food shopping (Q01)?
Q02	Where did you last go the time before that to do your MAIN FOOD shopping?
Q02A	Which internet retailer did you use for your main food shopping, the time before last (Q02)?
Q03	Where did you last go to do small, day-to-day TOP-UP food shopping?
Q03A	Which internet retailer did you use for your top- up shopping (Q03)?
Q04	On average, how often do you do your MAIN food shopping?
Q05	On average, how often do you do your TOP UP food shopping?
Q06	Could you tell me what other things you usually combine with doing your MAIN food shopping? [MR]
Q07	Moving on to NON-FOOD shopping, where do you most often buy clothes, shoes and other fashion items? You can mention up to two answers. [MR]
Q08	Where do you most often buy furniture, floor coverings and soft furnishings? You can mention up to two answers. [MR]
Q09	Where do you most often buy large domestic electrical appliances (such as fridges, washing machines, vacuum cleaners etc.)? You can mention up to two answers. [MR]
Q10	Where do you most often buy DIY and hardware goods? You can mention up to two answers. [MR]
Q11	Where do you most often buy other items of a mainly personal nature, such as sports goods, jewellery, books, toys, computers, mobiles, cameras, electronic games etc.? You can mention up to two answers. [MR]
Q12	How often do you use the Internet for buying non-food goods such as personal itmes and household goods?
Q13	Thinking about Internet shopping for non-food items such as personal items and household goods, what do you like most about shopping on the Internet? [MR] *Those who use the Internet for non-food shopping in Q12*
Q14	What is the main reason why do you never do non-food shopping via the Internet? [MR] *Those who never use the Internet for non-food shopping at Q12:*
Q15	Looking to the future, how frequently do you intend to use the Internet for non-food shopping? [PR]

Six Survey Zones

Appendix 2

On-street interviews in Lisburn City Centre and Sprucefield

Location of interviews (blue route lines)- Lisburn City Centre

Location of interviews (blue route lines)- Sprucefield Car Park

Sample sizes of 200 each in the City Centre and at Sprucefield

Main questions relevant to the Retail Capacity Study:

- Where do you come from? (to highlight the proportions of those from outside the Council area)
- Main reasons for visiting City Centre or Sprucefield today? (to identify where the reasons related to food shopping and to non-food shopping (various categories), and compare responses from those from outside the Council area with those living inside it- to weight accordingly.
- The extent of joint visits to the City Centre and Sprucefield at the same time

Appendix 3

Convenience shopping patterns from the household survey

Main food shopping destinations- based on last visited store/centre and the one prior to that.
Combined Q1 & Q2 from the questionaire

	Origin of shoppers			
	Lisburn Catchment Area	Forestside Catchment Area	Dundonald Catchment Area	Total
Destination				
Lisburn Catchment shops	78%	2%	2%	55%
Forestside Catchment shops	4%	80%	11%	18%
Dundonald Catchment shops	0%	0%	55%	7%
Outside Council area	18%	18%	33%	20%
Total	100%	100%	100%	100%

Note
The above data relates to the w eighted survey data and filtered to remove don't know s, varies, internet and mail order
Lisburn Catchment = household survey zones 1, 5 & 6 combined
Forestside Catchment = household survey zones 2 & 4 combined. Dundonald Catchment = household survey zone 3

Top-up food shopping destinations- based on last visited store/centre.
Q3 from the questionaire

	Origin of shoppers			
	Lisburn Catchment Area	Forestside Catchment Area	Dundonald Catchment Area	Total
Destination				
Lisburn Catchment shops	82%	3%	4%	60%
Forestside Catchment shops	2%	62%	2%	12%
Dundonald Catchment shops	0%	1%	80%	10%
Outside Council area	16%	34%	14%	18%
Total	100%	100%	100%	100%

Note
The above data relates to the w eighted survey data and filtered to remove don't know s, varies, internet and mail order
Lisburn Catchment = household survey zones 1, 5 & 6 combined
Forestside Catchment = household survey zones 2 & 4 combined. Dundonald Catchment = household survey zone 3

Lisburn & Castlereagh City Council area residents-all convenience shopping (Q1-Q3)combined from the questionaire

	Origin of shoppers			
	Lisburn Catchment Area	Forestside CatchmentArea	Dundonald Catchment Area	Total
Destination				
Lisburn Catchment shops	79%	2%	2%	56%
Forestside Catchment shops	3%	76%	9%	16%
Dundonald Catchment shops	0%	1%	60%	8%
Outside Council area	18%	21%	29%	20%
Total	100%	100%	100%	100%

Note
The above data relates to the weighted survey data and filtered to remove don't knows, varies, internet and mailorder
Lisburn Catchment = household survey zones 1, 5 & 6 combined
Forestside Catchment = household survey zones 2 & 4 combined. Dundonald Catchment = household survey zone 3
The w eighting in this table assiumes 80%:20% main food: top shopping

Appendix 4

Convenience expenditure inflows and outflows from the Council area

Convenience expenditure inflows to the Lisburn catchment- based on the NEMS on-street interview surveys 2017

	From: Republic of Ireland	Other countries	NI outside Council area	Total	% of sample
To Lisburn City Centre	13	5	60	78	38%
sample size			(189-129)		
207					
Main purpose of visit- food & grocery shopping					
Respondents from outside Council area		23%			
Respondents from the total sample		38%			
Weighted effect on proportion of all those visiting Lisburn City Centre					**23%**
To Sprucefield	22	4	83	109	53%
sample size			(178-95)		
204					
Main purpose of visit- food & grocery shopping					
Respondents from outside Council area		32%			
Respondents from the total sample		58%			
Weighted effect on proportion of all those visiting Sprucefield					**29%**

Lisburn City Centre- convenience turnover

	Floorspace sq m gross	Floorspace sq m net	Turnover per sq m	Turnover £million
M&S Simply Food	1,290	903	10,301	9.3
Tesco Express	300	225	15,265	3.4
Iceland	1,210	847	7,316	6.2
Other floorspace	4,270	2,776	5,800	16.1
Total	**7,070**			**35.0**
Contribution to City Centre turnover from shoppers outside the Council area:			23%	**8.0**

Sprucefield- convenience turnover

	Floorspace sq m gross	Floorspace sq m net	Turnover per sq m	Turnover £million
M&S -est conv floorspace	1,500	900	10,301	9.3
Sainsbury's, Sprucefield(total 8,330 sq	6,664	3,998	11,181	44.7
Total				**54.0**
Contribution to Sprucefield turnover from shoppers outside the Council area:			29%	**15.9**
Total inflows to Lisburn catchment				**23.9**

Convenience expenditure inflows to the Forestside catchment 2017- estimate

Forestside- convenience turnover

	Floorspace sq m gross	Floorspace sq m net	Turnover per sq m	Turnover £million
Sainsbury's, Forestside Centre (total 5,690 sq m gross)- 85% conv	4,837	2,902	11,181	32.4
Sainsbury's off-licence & a butcher, Forestside Centre	530	318	8,000	2.5
M&S Forestside (total 4,170 sq m)-est proportion	800	480	10,301	4.9
Total				**39.9**
Contribution to Forestside turnover from shoppers outside the Council area:			50%	**20.0**

Estimate base on the fact that Forestside is right on the border with Belfast

PTO

Convenience expenditure inflows					
Residents' expenditure potential by catchment area 2017	Lisburn catchment £ million **216.8**	Forestside catchment £ million **53.0**	Dundonald catchment £ million **42.3**		
	Origin- inflows from:			**Total inflow**	
Destination	Lisburn catchment	Forestside catchment	Dundonald catchment	from rest of Council area £ million	from outside Council area £ million
Lisburn catchment shops		2%	2%	1.8	23.9
Forestside catchment shops	3%		9%	11.3	20.0
Dundonald catchment shops	0%	1%		0.6	2.1
					46.0

Note

Results of a NEMS household shopping survey in Comber in 2015 indicated that 6% of respondents did their main food shopping at ASDA in Dundonald. The convenience expenditure potential in the Comber catchment is around £35 million, so the inflow to Dundonald is about £2.1 million.

Convenience expenditure outflows				
	Origin			
	Lisburn catchment	Forestside catchment	Dundonald catchment	Total
Retained expenditure by catchment	79%	76%	60%	80%
Total outflows	21%	24%	40%	20%
Outflows to centres outside Council area	18%	21%	29%	

Appendix 5

Internet and mail order spending on comparison goods – household survey

Special forms of trading (SFT)- internet and mail order from the household survey	
Clothing, shoes and fashion	14.0%
Furniture, floorcoverings & furnishings	8.0%
Large domestic appliances	13.0%
DIY and hardware	2.1%
Personal goods	24.4%
All comparison goods	**17.4%**

Weighting- from Experian expenditure per capita data for Lisburn & Castlereagh Council area 2015 in 2015prices	
All comparison shopping	%
Clothing, shoes and fashion	38.6%
Furniture, floorcoverings & furnishings	10.6%
Large domestic appliances	3.8%
DIY and hardware	3.8%
Personal goods	43.3%
Total comparison expenditure	100.0%
Comparison expenditureper capita	£3,656

Appendix 6

Comparison shopping patterns from the household survey

Q7: Where do you most often buy clothes, shoes and fashion items?

	Origin of shoppers			
	Lisburn Catchment Area	Forestside Catchment Area	Dundonald Catchment Area	Total
Destination				
Lisburn Catchment shops	57%	10%	0%	43%
Forestside Catchment shops	1%	41%	16%	9%
Dundonald Catchment shops	0%	0%	3%	0%
Outside Council area	42%	50%	81%	48%
Total	100%	100%	100%	100%

Note
The above data relates to the weighted survey data and filtered to remove don't knows, varies, internet and mail order
Lisburn Catchment = household survey zones 1, 5 & 6 combined
Forestside Catchment = household survey zones 2 & 4 combined. Dundonald Catchment = household survey zone 3

Q8: Where do you most often buy furniture, floorcoverings and soft furnishings?

	Origin of shoppers			
	Lisburn Catchment Area	Forestside Catchment Area	Dundonald Catchment Area	Total
Destination				
Lisburn Catchment shops	48%	10%	3%	37%
Forestside Catchment shops	0%	13%	2%	3%
Dundonald Catchment shops	0%	0%	4%	0%
Outside Council area	52%	77%	92%	60%
Total	100%	100%	100%	100%

Note
The above data relates to the weighted survey data and filtered to remove don't knows, varies, internet and mail order
Lisburn Catchment = household survey zones 1, 5 & 6 combined
Forestside Catchment = household survey zones 2 & 4 combined. Dundonald Catchment = household survey zone 3

Q9: Where do you most often buy large domestic appliances, such as fridges, washing machines and vaccum cleaners?

	Origin of shoppers			
	Lisburn Catchment Area	Forestside Catchment Area	Dundonald Catchment Area	Total
Destination				
Lisburn Catchment shops	85%	10%	0%	64%
Forestside Catchment shops	1%	52%	22%	11%
Dundonald Catchment shops	0%	0%	3%	0%
Outside Council area	14%	38%	74%	24%
Total	100%	100%	100%	100%

Note
The above data relates to the weighted survey data and filtered to remove don't knows, varies, internet and mail order
Lisburn Catchment = household survey zones 1, 5 & 6 combined
Forestside Catchment = household survey zones 2 & 4 combined. Dundonald Catchment = household survey zone 3

Q10: Where do you most often buy DIY and hardware?

	Origin of shoppers			
	Lisburn Catchment Area	Forestside Catchment Area	Dundonald Catchment Area	Total
Destination				
Lisburn Catchment shops	86%	7%	1%	63%
Forestside Catchment shops	2%	54%	5%	11%
Dundonald Catchment shops	0%	2%	7%	1%
Outside Council area	13%	37%	87%	25%
Total	100%	100%	100%	100%

Note

The above data relates to the weighted survey data and filtered to remove don't knows, varies, internet and mail order

Lisburn Catchment = household survey zones 1, 5 & 6 combined

Forestside Catchment = household survey zones 2 & 4 combined. Dundonald Catchment = household survey zone 3

Q11: Where do you most often buy other items of a mainly personal nature?

	Origin of shoppers			
	Lisburn Catchment Area	Forestside Catchment Area	Dundonald Catchment Area	Total
Destination				
Lisburn Catchment shops	63%	6%	0%	48%
Forestside Catchment shops	1%	40%	11%	8%
Dundonald Catchment shops	0%	0%	12%	1%
Outside Council area	35%	54%	78%	43%
Total	100%	100%	100%	100%

Note

The above data relates to the weighted survey data and filtered to remove don't knows, varies, internet and mail order

Lisburn Catchment = household survey zones 1, 5 & 6 combined

Forestside Catchment = household survey zones 2 & 4 combined. Dundonald Catchment = household survey zone 3

Q7-Q11 combined: Shopping patterns for all comparison goods by Council area residents *Weighting applied by category as shown in the previous Appendix)*				
	Origin of shoppers			
	Lisburn Catchment Area	Forestside Catchment Area	Dundonald Catchment Area	Total
Destination				
Lisburn Catchment shops	61%	8%	0%	46%
Forestside Catchment shops	1%	38%	12%	8%
Dundonald Catchment shops	0%	0%	7%	1%
Outside Council area	38%	54%	81%	45%
Total	100%	100%	100%	100%

Note

The above data relates to the weighted survey data and filtered to remove don't knows, varies, internet and mail order

Lisburn Catchment = household survey zones 1, 5 & 6 combined

Forestside Catchment = household survey zones 2 & 4 combined. Dundonald Catchment = household survey zone 3

Weighting- from Experian expenditure per capita data for Lisburn & Castlereagh City Council area 2015 in 2015 prices	
All comparison shopping	%
Clothing, shoes and fashion	38.6%
Furniture, floorcoverings & furnishings	10.6%
Large domestic appliances	3.8%
DIY and hardware	3.8%
Personal goods	43.3%
Total comparison expenditure	100.0%
Comparison expenditure per capita	£3,656

Note

Under large domestic appliances, allowance for 50% of expenditure on audio visual goods is added, to cover items such as TVs etc.

Under the DIY and hardware category, china, glass and cutlery has not been included

Appendix 7

Comparison expenditure inflows and outflows from the Council area

Comparison expenditure inflows to the Lisburn catchment- base on the NEMS on-street interview surveys 2017

	From:				
	Republic of Ireland	Other countries	NI outside Council area	Total	% of sample
To Lisburn City Centre	13	5	60	78	38%
sample size			(189-129)		
207					
Main purpose of visit- shopping for:					
	Total sample				
	category weighting	% respondents shopping-for	% respondents		
clothes & shoes	*39%*	15.5%	weighted		
gifts & personal items	*43%*	9.2%	combination		
househod items	*18%*	2.2%			
All comparison goods	100%		**10.4%**		
	Those from outside Council area				
clothes & shoes	*39%*	18.6%			
gifts & personal items	*43%*	4.1%			
househod items	*18%*	4.1%			
All comparison goods	100%		**9.7%**		
Weighted effect on proportion of all those visiting City Centre - for comparison shopping					35%
Adjusted proportion, as the turnover would become unrealistically high					**30%**
Respondents from outside Council area		23%			
Respondents from the total sample		38%			
To Sprucefield	22	4	83	109	53%
sample size			(178-95)		
204					
Main purpose of visit- shopping for:					
	Total sample				
	category weighting	% respondents shopping-for	% respondents		
clothes & shoes	*39%*	18.6%	weighted		
gifts & personal items	*43%*	9.3%	combination		
househod items	*18%*	2.5%			
All comparison goods	100%		**11.7%**		
	Those from outside Council area				
clothes & shoes	*39%*	23.1%			
gifts & personal items	*43%*	7.4%			
househod items	*18%*	3.3%			
All comparison goods	100%		**12.8%**		
Weighted effect on proportion of all those visiting Sprucefield - for comparison shopping					58%
Adjusted proportion, as the turnover would become unrealistically high					**50%**
Lisburn City Centre- comparison turnover					
	Floorspace		Turnover	Turnover	
	sq m gross	sq m net	per sq m	£million	
Total	48,170	31,311	5,950	186.3	notional
Contribution to City Centre turnover from shoppers outside the Council area:			30%	**55.9**	
Sprucefield- comparison turnover					
	Floorspace		Turnover	Turnover	
	sq m gross	sq m net	per sq m	£million	
Total	34,920	27,936	4,000	111.7	notional
Contribution to Sprucefield turnover from shoppers outside the Council area:			50%	**55.9**	
Total inflows to Lisburn catchment				**111.8**	

Comparison expenditure inflows to the Forestside catchment 2017-estimate					
Forestside- comparison turnover					
	Floorspace sq m gross	sq m net	Turnover per sq m	Turnover £million	
Total	19,860	13,902	3,800	52.8	notional
Contribution to Forestside turnover from shoppers outside the Council area:			50%	**26.4**	
Estimate base on the fact that Forestside is right on the border with Belfast					

Comparison expenditure inflows					
Residents' expenditure potential by catchment area 2017	Lisburn catchment £ million **317.8**	Forestside catchment £ million **77.7**	Dundonald catchment £ million **62.0**		
	Origin- inflows from:			**Total inflow**	
Destination	Lisburn catchment	Forestside catchment	Dundonald catchment	from rest of Council area £ million	from outside Council area £ million
Lisburn catchment shops		8%	0%	6.5	111.8
Forestside catchment shops	1%		12%	10.9	26.4
Dundonald catchment shops	0%	0%		0.1	1.5
					139.7

Comparison expenditure outflows				
	Origin			
	Lisburn catchment	Forestside catchment	Dundonald catchment	Total
Retained expenditure by catchment	61%	38%	7%	55%
Total outflows	39%	62%	93%	45%
Outflows to centres outside Council area	38%	54%	81%	

Appendix 8

Sprucefield- list of retailers

Sprucefield Shopping Centre:comparison goods floorspace and turnover 2017 (in 2016 prices)

	Floorspace sq m		Turnover	Turnover
	gross	net	£ per sq m	£million
Next Home	1160	928	2,200	2.0
Next	1480	1184	4,100	4.9
Mothercare	1390	1112	4,643	5.2
Marks & Spencer Home	4070	3256	1,900	6.2
B&Q	4880	3904	1,818	7.1
Toys `R` Us	5180	4144	1,915	7.9
Currys & PC World Megastore	5520	4416	5,949	26.3
Argos	960	768	18,823	14.5
Pets At Home	1620	1296	2,715	3.5
Boots	1290	1032	3,746	3.9
Marks & Spencer (total 8,870 sq m, less.1,500 sq m conv)	7370	5896	2,090	12.3
Total at average levels	34,920	27,936		93.7
Estimated Sprucefield over-trading at 20%				18.7
Estimated actual total turnover				**112.5**

Note

Gross floorspace data source- Goad

Company average turnover ratios applied, based on Retail Rankings 2017, adjusted to include VAT.

6.0 TOWN CENTRE HEALTH CHECKS 2018

Town Centre Health Checks 2018

May 2018

Ove Arup & Partners Ltd

In association with *Roderick MacLean Associates Ltd*

Ove Arup & Partners Ltd, Bedford House, 16-22 Bedford Street, Belfast BT2 7FD

Roderick MacLean Associates Ltd, 1/2 West Cherrybank, Stanley Road, Edinburgh EH6 4SW

Contents

1 Introduction

1.1 The research

1.1.1 *Ove Arup & Partners Ltd* with *Roderick MacLean Associates Ltd* as sub consultants, were appointed by Lisburn & Castlereagh City Council in 2017 to prepare a retail capacity study for the Council area and to prepare health checks on Lisburn City Centre and other selected town centres.

1.1.2 The main purpose of the research is to inform the emerging Local Development Plan (LDP) for the Council area, together with providing supporting information to update the Lisburn City Centre Masterplan.

1.1.3 This document contains Town Centre health checks for Lisburn City Centre, and for the town centres of Carryduff, Dundonald, Hillsborough and Moira to assess their vitality and viability; to include the following, based on the list of performance indicators in the *Strategic Planning Policy Statement for Northern Ireland, September 2015* (SPSS);

- *Vitality indicators*, including pedestrian footfall and the diversity of uses, including retail, leisure and other uses;
- *Market indicators*, including retail rents, yields, retailer representation and requirements and vacancy rates; and
- *Qualitative indicators*- accessibility and parking, customer views and perceptions of the town centres, opportunities and constraints, physical structure and environmental quality and the evening economy;

1.1.4 The main purpose of the research is to inform the emerging Local Development Plan (LDP) for the Council area, together with providing supporting information to update the Lisburn City Centre Masterplan.

1.1.5 More specifically, the research is aimed at assisting the Council in providing the evidence base to support the Council's Preferred Options, having considered the alternatives under each option on retailing and town centres in the LDP Preferred Options Paper for public consultation.

These include:

- **Option 11A Preferred Option:** Extend the existing City Centre boundary - This option proposes an extension to the existing City Centre boundary to include the Lisburn Leisure Park complex located on Governors Road/Laganbank Road. This option could strengthen the existing City Centre by providing further expansion of the existing boundary and greater linkages between the retail, commercial and leisure offer in the City Centre. The area of open space at Union Bridge offers a further potential extension to the City Centre boundary and opens up links between the City Centre and the River Lagan. The extension of the boundary to include the lower end of Longstone Street also offers potential to provide linkages between this thriving area and the City Centre. (pg 105)

- **Option 11B Alternative Option**: Retain the existing City Centre boundary, as defined in the current Development Plan - This option protects the existing City Centre area as the main centre for retailing and commercial activity.

- **Option 12A Preferred Option**: Retain the existing town centre of Carryduff and designate town centre boundaries in the historic towns of Hillsborough and Moira - This option enables the provision of a new town centre boundary for each of these towns to align with the existing Conservation Areas. (pg 107)

- **Option 12B Alternative Option**: Retain the existing defined town centre of Carryduff- This option maintains the status quo of having only one identified town centre in the Plan.

- **Option 13A Preferred Option:** Retain and reinforce Sprucefield as a Regional Shopping Centre – This option prioritises Sprucefield as a Regional Shopping Centre recognising its key strategic location on the North-South economic corridor and Key Transport Corridors. (pg 109)

- **Option 13B Alternative Option:** Retain Sprucefield Regional Shopping Centre but extend uses to include recreation and leisure – This option provides the opportunity to identify a range of uses to widen the economic base for the regional, and strategically placed, out-of-town shopping centre.

- **Option 14A Preferred Option:** Extend District and Local Centre Boundaries – amend the boundaries of Forestside District Centre to include adjacent lands to the north including the Homebase and Drumkeen Retail Park; and Dundonald Local Centre to include the Park & Ride site to the north-east. (pg 111)

- **Option 14B Alternative Option:** Retain the existing boundaries at Forestside District Centre and Dundonald Local Centre – This option does not permit any further expansion at these locations.

1.1.6 The research has been divided into two documents, of which this report is the second one below:

- **The Retail Capacity Study-** containing forecasts of spare retail expenditure capacity from 2017-27, which could support new retail development in Lisburn and in the rest of the Council area;

- **Town Centre Health Checks**- for *Lisburn City Centre* and the town centres of *Dundonald, Carryduff, Hillsborough and Moira*. The health checks apply a set of key performance indicators to each town centre. The findings provide guidance for the emerging LDP on relevant issues and opportunities for each town which future policies need to address.

1.2 Interview surveys

1.2.1 Two interview surveys were undertaken by NEMS Market Research for our consultancy team as part of the research.

Household survey

1.2.2 A telephone interview survey was conducted on a sample of 1,100 households throughout the Council area, using a structured questionnaire. The purpose was to identify the shopping patterns of residents and to collect information on their use and perceptions of the town centres for the health check assessments.

1.2.3 The Council area was divided into six zones with interview quotas applied accordingly. This enabled the three distinct retail catchment areas to be identified within the Council area in terms of shopping patterns.

1.2.4 More detail on the household survey zones, populations, and selected questions asked in relation to the use and perceptions of the town centres, is given in Appendix 1. The NEMS output tables are available as a separate document to accompany this report. The analysis is presented in section 4.

On-street interview surveys

1.2.5 Face-to-face interview surveys were conducted in Lisburn City Centre and at Sprucefield Shopping Centre by NEMS Market Research, from samples of 200 at each centre. A structured questionnaire was used. The *purpose* was to identify the proportion of shoppers coming from outside the Council area, and their contribution to the turnover of the centres for the Retail Capacity Study.

1.2.6 The on-street surveys were mainly concerned with shopping patterns, not the use and perceptions of town centres. There were a limited number of questions relevant to the health check for Lisburn City Centre though, and these are referred-to in section 4. The NEMS output tables are also available as a separate document to accompany this report.

2 Planning policy framework

2.1 Introduction

2.1.1 This section briefly summarises the planning policy background to set the context for the health checks.

2.2 Development Plans and town centres

2.2.1 The Regional Development Strategy 2035 recognises Lisburn as a major employment and commercial centre, strategically located on the main transport corridors.

2.2.2 The current development plan is the draft Belfast Metropolitan Area Plan 2015 (draft BMAP) which includes the Lisburn & Castlereagh Council area. It will be replaced by the emerging Local Development Plan (LDP).

2.2.3 Under the existing draft BMAP, Lisburn City Centre is promoted as the main focus for additional retail development. At a lower level, Carryduff town centre is also identified as a location for additional retail development. Otherwise, outside the City Centre and town centres, new retail development is to be focussed on the District and Local centres. Sprucefield is designated as a Regional Centre.

2.2.4 Forestside is designated as a District Centre and a Local Centre is situated within the Castlereagh Urban Area at Dundonald. Among the towns, only Carryduff has an identified town centre. Hillsborough and Moira each have a ‘settlement development limit’ in the BMAP, but no defined town centres at present.

2.2.5 As part of the consultation process in preparation of the emerging new LDP, the Council published its Preferred Options paper in 2017, which contained a list of such options over a range of topics, including the town centre related issues described in section 1 of this study.

2.2.6 Essentially, preferred options are: to expand the City Centre boundary, retain Carryduff town centre boundary, define town centre boundaries for Hillsborough and Moira, extend the boundaries of Forestside District

Centre and Dundonald Local Centre and retain/ reinforce Sprucefield as the Regional Shopping Centre. The purpose of the Retail Capacity Study and Town Centre Health Checks reports are to inform the selected options.

2.2.7 Assessment of the preferred options relating to Sprucefield and Forestside are covered in the accompanying Retail Capacity Study i.e. Options 13A, 13B and 14A and 14B. Assessments of the preferred options for the City Centre are covered in both the Retail Capacity Study and the Health Checks reports.

2.3 City Centre Masterplan

2.3.1 Both studies also serve to inform the latest draft City Centre Masterplan. Arup met with the City Centre Ambassadors on Thursday 14th December 2017 to gain early feedback to the Lisburn City Centre Masterplan review. Various aspects were addressed across both the retail and commercial leisure sectors.

2.4 Strategic Planning Policy Statement – Health Checks

2.4.1 The Strategic Planning Policy Statement for Northern Ireland (SPPS) sets out the Department for Infrastructure’s regional planning policies for securing the orderly and consistent development of land in Northern Ireland under the reformed two-tier planning system. The provisions of the SPPS must be taken into account in the preparation of Local Development Plans and are also material to all decisions on individual planning applications and appeals.

2.4.2 In preparing LDPs councils must undertake an assessment of the need or capacity for retail and other main town centre uses across the plan area. Councils must also prepare town centre health checks and regularly review these (preferably at least once every five years). These health checks will help form an evidence base for LDPs. They will contain information on a range of indicators, including:

- existing town centre uses, including resident population;
- vacancy rates;
- physical structure and environmental quality – including opportunities, designations constraints;
- footfall;
- retailer representation;
- attitudes and perceptions;
- prime rental values; and
- commercial yields.

2.4.3 In this report, we have interpreted the list of key indicators in detail in section 5.

3 Retail and leisure market in Lisburn & Castlereagh

3.1 Introduction

3.1.1 This section of the report contains a review of the retail and leisure market in Lisburn, together with data on the distribution of floorspace by type, multiple retailer representation and vacancy rates for the towns of Carryduff, Hillsborough and Moira and Dundonald Local Centre.

3.1.2 Interpretation of the retail markets in the small towns is provided directly within the health checks in section 5, because they are small and to avoid repetition with this section. The market assessments include advice and inputs from commercial agents, CBRE for this study.

3.2 Town centre floorspace and diversity of uses

3.2.1 Prior to our market commentary, the level and diversity of current floorspace in the study town centres is shown in Table 3.1 at a broad level, distinguishing retail from other uses. The distribution is also illustrated by the graphs in Figure 3.1. It reveals the higher proportion of comparison retailing in Lisburn City Centre compared to the smaller towns, which reflects its role as a major shopping centre. The graphs also reveal the high proportion of non-retail services in the town centres, which are an important contribution to the vitality of the centres

3.2.2 A more detailed breakdown by category of uses for Lisburn City Centre is shown in Table 3.2, both by floorspace and by unit numbers. The changes in proportions by floorspace since 2012 are shown in Table 3.3, which show considerable rises in the restaurant/café sector and in the proportion of vacant floorspace.

3.2.3 More detailed breakdown of other town centre uses in the service sector among the small towns is shown in Table 3.4.

3.3 Vacancy rates by unit

3.3.1 The vacant units in Lisburn City Centre and in the small towns is shown in Table 3.5. Vacancy rates are commonly expressed based on units rather than floorspace, especially when comparing different town centres. The vacancy rate in the City Centre is 21%, which is slightly higher than the comparator towns of a similar size shown in the table- apart from Ballymena which has a higher rate. The average town centre vacancy rate in Northern Ireland is 15%.

3.3.2 There are variations in the vacancy rates within the City Centre. The AECOM study in 2017, recorded vacancy rates of 9% in the primary retail frontage areas (Bow Street/ Market Street and part of Chapel Hill), but over 30% in the Bow Street Mall and 48% in Lisburn Square. Overall, vacancy rates are a weakness in the City Centre.

3.3.3 Among the small towns, the vacancy rates are low, indicating a degree of balance in the supply and demand for property space.

3.4 Multiple retailer representation

3.4.1 The proportion of multiple retailer representation in any town centre is a measure of strength in terms of investment and the quality of retail offer. Table 3.6 shows the proportions of multiple retailer representation in Lisburn City Centre and in the other small towns, together with comparator towns elsewhere in Northern Ireland. Multiple representation in Lisburn City Centre is 38%, which is like Ballymena, Derry/Londonderry and just slightly less than Newry.

3.4.2 Among the small towns, multiple representation is quite high in Dundonald (which includes ASDA, B&M, Winemark and others) but lower in the rest of the small towns, as expected for small towns.

3.5 Lisburn retail market

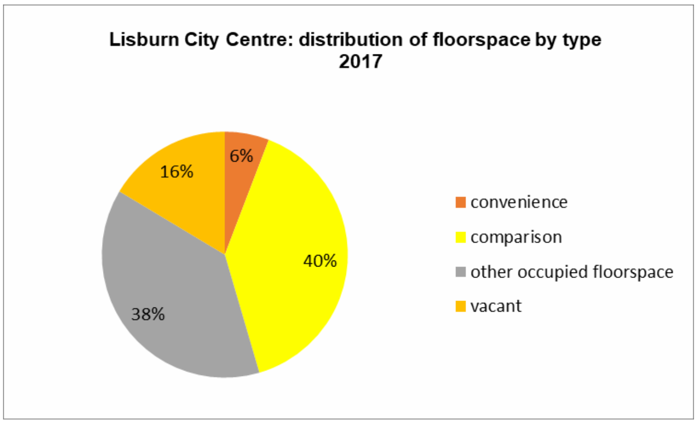
3.5.1 Lisburn City Centre is the largest retail centre in the Council area, with nearly 48,200 sq m gross of comparison shopping floorspace and nearly 7,100 sq m gross of convenience shopping floorspace. This compares with some 34,900 sq m gross comparison floorspace at Sprucefield Regional

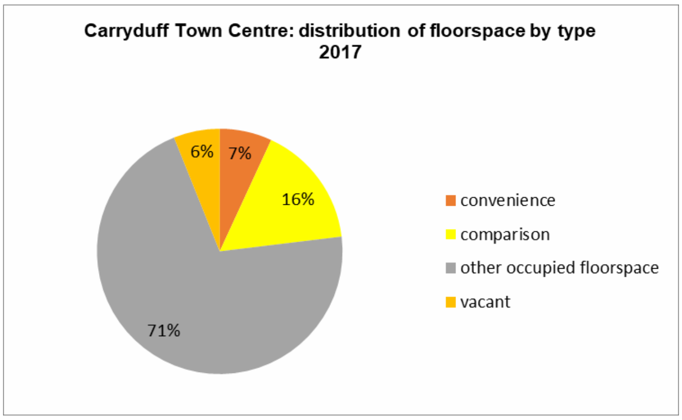
Table 3.1
Lisburn City Centre and other selected town centres: occupied and vacant floorspace - summary breakdown 2017

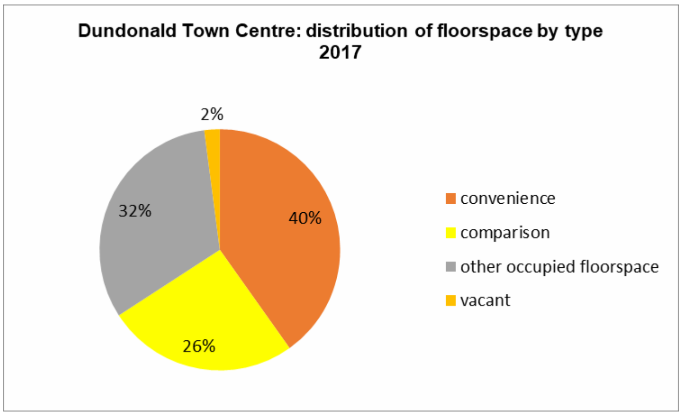
	Convenience floorspace		Comparison floorspace		Other occupied floorspace		Vacant floorspace		Total
	sq m gross	% of total	sq m gross	% of total	sq m gross	% of total	sq m gross	% of total	sq m gross
Lisburn City Centre	7,070	*6%*	48,170	*40%*	46,330	*38%*	19,920	*16%*	121,490
Other town centres									
*Carryduff	510	*7%*	1,200	*16%*	5,250	*71%*	450	*6%*	7,410
Dundonald	3,881	*40%*	2,483	*26%*	3,100	*32%*	200	*2%*	9,664
Hillsborough	1,420	*15%*	1,350	*14%*	6,450	*69%*	150	*2%*	9,370
Moira	1,740	*13%*	2,550	*19%*	8,850	*66%*	300	*2%*	13,440

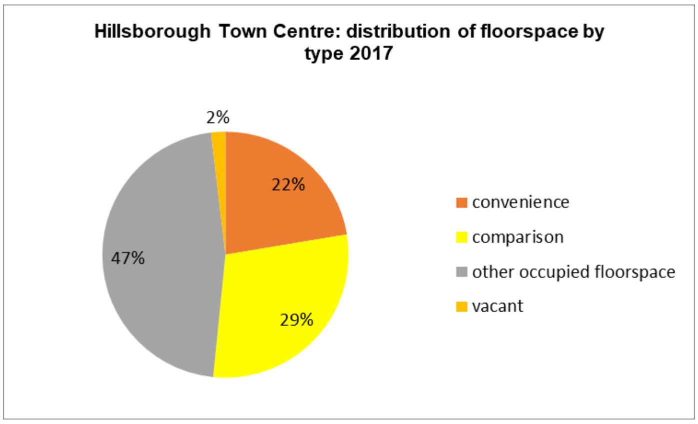
Sources:
Lisburn City Centre- mainly Goad. Includes adjustments for convenience and comparison components of supermarkets.
Dundonald includes ASDA and B&M. Otherwise for the small towns- street count of units with estimated unit sizes applied.
* Carryduff vacant floorspace- note that this *excludes* the extensive vacant floorspace in the Carryduff Shopping Centre, as this space will be redeveloped under Application LA05/20161245/F to include Lidl and other uses, involving demolition of the existing Centre.

Figure 3.1 Distribution of town centre floorspace by type









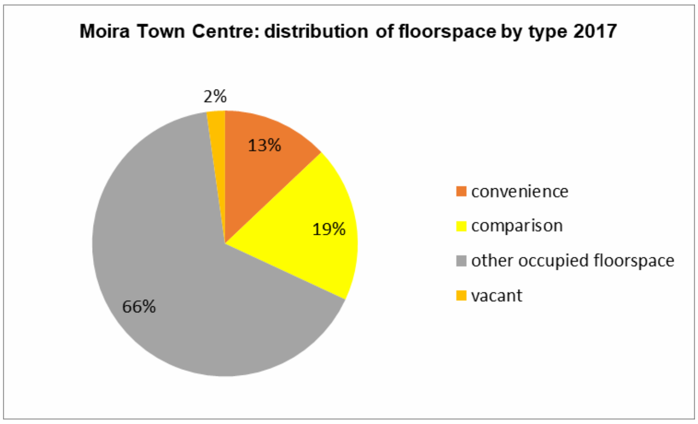


Table 3.2
Lisburn City Centre - distribution of floorspace by type of use 2017

Lisburn City Centre	Foorspace sq m gross	%	Nos of units	%
Comparison retail	48,170	40%	138	26%
Convenience retail	7,070	6%	27	5%
Restaurants, cafes, pubs, take aways	9,630	8%	55	10%
Other services-hair,cleaners, travel agents etc	8,520	7%	72	13%
Banks, BS, financial services, insurance	3,980	3%	25	5%
Property, offices and professional services	6,910	6%	49	9%
Leisure, gaming, halls cinemas, libraries etc	4,810	4%	17	3%
Public services, PO and other miscellaneous	12,480	10%	37	7%
Vacant units	19,920	16%	115	21%
All floorspace	**121,490**	100%	**535**	100%

Source
Goad survey 2016 w ith updates- assume for 2017

Table 3.3
Lisburn City Centre: change in floorspace by sector from 2012-2017 where data is available

	Floorspace 2012 sq m gross	Floorspace 2017 sq m gross	*% change 2012-2017*
Lisburn City Centre			
Comparison retail	47,035	48,170	*2%*
Convenience retail	6,707	7,070	*5%*
Restaurants, cafes, pubs, take aways	6,791	9,630	*42%*
Other services-hair,cleaners, travel agents etc	8,509	8,520	*0%*
Banks, BS, financial services, insurance	4,245	3,980	*-6%*
**Property, offices and professional services	2,675	6,910	
Other occupied floorspace	*	17,290	
Vacant units	16,722	19,920	*19%*
Total	*	121,490	

Sources: Goad surveys for Lisburn City Centre in 2012 and 2016 (w ith adjustments for 2017)
* The 2012 Goad data does not include the full range of sectors, notably public/ commmunity/ religious/ health service uses.
** The 2012 Goad data does not include some office uses, so is not entirely compatible for asssement of change

Table 3.4
Distribution of other occupied units in the town centres by type of use 2017

Type	**Other occupied town centre floorspace**	**Carryduff** units		**Dundonald** units	
1	Restaurants, cafes, pubs, take aways	4	16%	8	26%
2	Other services-hair,cleaners, travel agents etc	4	16%	13	42%
3	Banks, BS, financial services, insurance	3	12%	1	3%
4	Property, offices and professional services	2	8%	2	6%
5	Leisure, gaming, halls cinemas, libraries etc	3	12%	3	10%
6	Public services, PO and other miscellaneous	9	36%	4	13%
	Total	25	100%	31	100%

Type	**Other occupied town centre floorspace**	**Hillsborough** units		**Moira** units	
1	Restaurants, cafes, pubs, take aways	13	30%	16	27%
2	Other services-hair,cleaners, travel agents etc	8	19%	11	19%
3	Banks, BS, financial services, insurance	3	7%	5	8%
4	Property, offices and professional services	7	16%	10	17%
5	Leisure, gaming, halls cinemas, libraries etc	3	7%	2	3%
6	Public services, PO and other miscellaneous	9	21%	15	25%
	Total	43	100%	59	100%

Note
Based on street surveys 2017

Note: the category '*Other services'* excludes services listed as Type 1 and Types 3-6 in the tables on this page.

Table 3.5
Vacant units in Lisburn City Centre and the four other study town centres - 2017

	Vacant units	Total units	Vacancy rate %
Lisburn City Centre	115	535	21%
Other study town centres			
*Carryduff	3	39	8%
Dundonald	2	47	4%
Hillsborough	1	60	2%
Moira	2	85	2%
Other large town centres/ NI average			
Ballymena	117	515	23%
Derry/ Londonderry	89	463	19%
Newry	80	464	17%
Northern Ireland (source N I Retail Consortium-Springboard) Nov 2017			15%

Note: vacancy rate= vacant units/ (retail and non-retail service units & vacant units)
Sources: Goad surveys and recent unit counts in the smalll study tow n centres.
* Excludes vacant floorspace in the Carryduff Shopping Centre, w hich is scheduled for demolition (see Table 3.1 footnote)

Table 3.6
Multiple retailer representation in Lisburn City Centre and the four other study town centres - 2017

	*Multiple retailers	Convenience and comparison shops	% multiple retailers
Lisburn City Centre	62	165	38%
Other study town centres			
Carryduff	2	11	18%
Dundonald	5	14	36%
Hillsborough	3	16	19%
Moira	4	23	17%
Other large town centres/ NI average			
Ballymena	80	210	38%
Derry/ Londonderry	73	192	38%
Newry	85	210	40%

Note
* refers to multiple retailers only, excluding multiple non-retail services. Includes national multiples and regional chains. A multiple is defined as a retailer w ith 9 or more outlets (Experian). Charity shops have not been classified as muliples here.

Shopping Centre, plus nearly 8,200 sq m convenience floorspace (Sainsbury's and part of M&S). The level of convenience floorspace in the City Centre is quite limited.

3.5.2 In terms of trading performance, the Retail Capacity Study (Table 6.8) reveals that Lisburn City Centre accounts for 59% of the comparison retail turnover within the Lisburn/Sprucefield catchment area defined in that study. Also, shoppers visiting the City Centre from outside the Council area contributed to 35% of its comparison retail turnover. However, comparison retail expenditure outflows from the Lisburn catchment are quite high at 39% of residents' expenditure. This is unsurprising, given the proximity of the much larger retail offer in Belfast.

3.5.3 These findings indicate that Lisburn City Centre is performing acceptably within that context, and there is scope for some improvement to its market share, but no radical increase in its market share seems likely in the context described. Trends over the last five years reveal only small increases in retail floorspace in the City Centre, as shown in Table 3.3. The level of City Centre vacancies suggests that increased competition from the internet, combined with the attraction of shoppers to Belfast, poses a risk unless the range and quality of retailing in the City Centre improves.

3.5.4 Multiple retailer representation in Lisburn City Centre is good at 38%. The comparison sector has representation by the following key multiples: Dunnes, H&M, Next, New Look, Trespass, Argos, River Island, Boots, Bon Marche, Shoe Zone, TK Maxx, Waterstones and others. The budget offer includes Primark, B&M Bargains, Poundstretcher, Poundland and others. One weakness is the lack of representation by major department stores aside from Dunnes and the independent Woodsides Department store. Previous representation by BHS ended with its recent closure. However, the scale and range of independent retailers is of key importance to the City Centre.

3.5.5 The City Centre would benefit from a greater range of speciality shops and also from improvements in the quality of offer. The presence of around 12 charity shops also indicates a weakness in the retailer demand to take-up properties, especially when coupled with the current level of vacant units in some locations.

3.5.6 In the *convenience sector*, key multiple representation in the City Centre includes M&S Simply Food, Tesco Express, Iceland, Holland & Barrett. The limited level of convenience store representation generally, is aimed at ‘basket’ shopping, with main supermarkets located outside the City Centre.

3.5.7 Recent arrivals in the City Centre include a mix of retailers and services including restaurants. A list of these is provided by CBRE in Appendix 2, which contains updates to their list in the AECOM study. Twelve new retailers arrived in the City Centre during the years 2016 and 2017, including clothing and fashion shops, together with new service operators, including several restaurants.

3.5.8 A list of notable store departures from the City Centre in recent years is provided in Appendix 3. These include companies which have ceased trading, such as BHS and also those operators who now just operate from Sprucefield, with no City Centre representation, such as Mothercare and Argos.

3.5.9 The largest recent retail investment in the City Centre is the refurbishment of the terrace of retail units at Laganbank Retail Park, where tenants include TK Maxx, and Pure Gym.

3.5.10 CBRE report increased lettings in recent times in the City Centre, with increased activity in previously stagnating areas, such as Lisburn Square, Bridge Street and Railway Street. CBRE is aware of current retailer demand to locate in the City Centre, for example, The Original Factory Shop has a requirement for a unit of around 5,000 sq ft. However, it is difficult to predict in the current economic climate. There is evidence of prime Zone A retail rents in the City Centre from recent transactions. They include £21-£45 per sq ft in Bow Street, £18-£34 per sq ft in Bow Street Mall and around £14 per sq ft in Lisburn Square. Commercial yields in the City Centre are around 6%.

3.5.11 From the analysis in this section, the retail market trends indicate that the City Centre retail offer over the next five to ten years has potential to expand at a modest level at best or hold its current position which would be no small achievement against the background of how people are shopping in the current retail /economic climate with growing online shopping and increasing competition.

3.5.12 Provision of suitable retail units to meet modern retailer requirements will be important to retain the retail offer in the City Centre and attract new retailers- in combination with the leisure offer to complement it, plus improved accessibility and environmental improvements, which combine to support the City Centre as a destination.

3.6 Lisburn leisure market

3.6.1 Lisburn is the main centre for leisure in the Council area. There are 55 food and drink outlets (bars / restaurants / take-away’s / public houses / cafes) in Lisburn City Centre, totalling 9,630 sq m plus an additional 17 units totalling 4,810 sq m classed as leisure (bingo & amusements / betting/ health clubs/ halls/fitness/ solariums / museums / galleries and libraries. There are also a number of gyms and fitness studios in and around the City Centre, including the new Pure Gym at Laganbank.

3.6.2 The principal leisure development is the Lagan Valley LeisurePlex at Lisburn Leisure Park, which has a swimming pool with water slides, a diving pool and a health and fitness gym, plus a sports hall. Nearby is the Omniplex Cinema and the Lisburn Bowl at Governors Road on the edge of the City Centre, including a gaming/ amusements centre, plus the new gym at Laganbank). There are 13 restaurants/ fast food diners and cafes situated by the LeisurePlex and the Omniplex Cinema:

Jersey Street Grill
Subway
Pepi's Piri Piri
Ed's Bar and Grill
Bodene's Diner
Pizza Hut
Café Vanilla
Beef and Bird
Boston Grill
Eddie Rockets City Diner
KFC
Costa Coffee, (by Omniplex)
Sinnamon Coffee Pool Café (Leisureplex)

Source- recent Google survey

3.6.3 CBRE is aware of market interest by coffee shop retailers including Café Nero who are looking for a 2,500 sq ft unit and Tim Hortons has a drive-thru requirement in the wider Lisburn area. The agents comment that the recent arrivals of food and beverage outlets at Lisburn Square, combined with late store openings (Man Shack and Shane Bennett for example), have stimulated increased evening visits to the City Centre.

3.7 Conclusions on the City Centre market potential

3.7.1 CBRE assess the scope for improving the retail offer in Lisburn City Centre for this study. They advise that, for a shopping destination to be successful, a mix of around 40% retail, 40% leisure and 20% other activities should be accommodated to attract the public. Also, this mix of uses will assist promotion of the City Centre to a wide range of age groups. They quote Victoria Square in Belfast as an example. There are limiting market and property related factors on the potential to accommodate major increases in retailing in Lisburn City Centre, as mentioned in previous paragraphs.

3.7.2 CBRE suggest that the main scope for improvement should aim towards a modest scale of retail development, combined with mainly restaurant and café provision and links to other forms of leisure. This would generate increased footfall, both during the day and in the evenings, which is essential to maintain improved levels of business activity in the future.

4 Interview surveys

4.1 Introduction

4.1.1 The research includes two different interview surveys:

- A household telephone interview survey covering the Lisburn & Castlereagh City Council area, including each of the three retail catchment areas within the Council area, as defined in the Retail Capacity Study (sample total 1,100); and
- On-street shopper interviews in Lisburn City Centre (200) and at Sprucefield (200).

4.1.2 This section summarises the findings of the surveys, which provide valuable data on the use and perceptions of the selected town centres, to inform this Health Check Study. Both surveys also provided essential information on shopping patterns which underpin the Retail Capacity Study.

4.2 Household survey

4.2.1 The output tables produced by NEMS Market Research, showing the questions and responses, are provided in a separate document accompanying this report. A list of the questions on use and perceptions of the town centres is provided in Appendix 1 to this Health Check document for quick reference.

4.3 Use and perceptions of the town centres- general

4.3.1 Questions on the use and perceptions of the following town centres were included, in accordance with the study brief:

- Lisburn City Centre
- Carryduff
- Dundonald
- Hillsborough
- Moira

4.3.2 For Lisburn City Centre, responses to the town centre related questions are recorded from the whole 1,100 sample for the Council area from the household survey.

4.3.3 For the small towns, the responses are drawn from interviews in the relevant survey zones applied in the household survey which form the hinterlands to each town. There are six zones, as shown on the map in the Retail Capacity Study and reproduced here in Appendix 1. Presentation of the findings is in the form of composite tables for all five town centres together by topic but including graphs for Lisburn City Centre in addition.

- Carryduff- respondents from Zone 4
- Dundonald- respondents from Zone 3
- Hillsborough- respondents from Zone 5
- Moira- respondents from Zone 6

4.4 Frequency of visit to the town centres

4.4.1 Table 4.1 shows the reported frequency of visits to each of the town centres by the respondents. The most common frequency of visits were several times a week and once a week. Quite high proportions of respondents never visited their town centre, especially in Carryduff

4.5 Mode of travel

4.5.1 The most common mode of travel to each of the town centres is shown in Table 4.2. It reveals the primacy of the car, especially for visits to Lisburn and Carryduff town centres, although significant proportions walked in Dundonald, Hillsborough and Moira.

4.6 Dwell time in the town centres

4.6.1 Table 4.3 shows how long the respondents stayed in the town centres. For Lisburn, the dwell times were generally much longer at between 1-3 hours, compared to lengths of visit among the small towns. This is expected because of its greater size and offer.

4.7 Main reasons for visiting the town centre

4.7.1 The most frequently mentioned reasons for visiting the town centres are shown in Table 4.4. *Shopping generally*, and *non- food shopping* featured highest in Lisburn, but the main reasons for visiting Carryduff and Dundonald town centres was *food shopping*. Visiting cafes and restaurants was also mentioned frequently in Hillsborough and Moira.

Table 4.1
Frequency of visit to the town centre

Frequency of visit	Lisburn City Centre	Carryduff TC	Dundonald TC	Hillsborough TC	Moira TC
Daily	5%	15%	21%	13%	29%
Between 2 and 6 times a week	17%	18%	28%	32%	19%
Weekly	17%	6%	20%	19%	5%
2-3 times a month	12%	5%	2%	1%	3%
Once a month	12%	0%	3%	14%	6%
Less frequently than once a month	11%	8%	5%	2%	5%
Never visit	26%	47%	19%	18%	28%
from:	Council area	zone 4	zone3	zone 5	zone 6

Table 4.2
Normal mode of transport to the town centre

	Lisburn City Centre	Carryduff TC	Dundonald TC	Hillsborough TC	Moira TC
Car	81%	81%	61%	72%	58%
Walk	9%	17%	30%	26%	35%
Bus	8%		4%	1%	0%
Other/ don't know	2%	2%	5%	1%	7%
from:	Council area	zone 4	zone3	zone 5	zone 6

Table 4.3
Length of time spent in the town centre

	Lisburn City Centre	Carryduff TC	Dundonald TC	Hillsborough TC	Moira TC
Less than 30 minutes	5%	51%	32%	23%	19%
30 minutes - 59 minutes	18%	39%	28%	22%	20%
1 hour – 1 hour 59 minutes	45%	3%	23%	27%	24%
2 hours – 2 hours 59 minutes	20%	1%	4%	16%	16%
3 hours – 3 hours 59 minutes	5%	0%	0%	8%	0%
4 hours or more	5%	0%	6%	1%	1%
from:	Council area	zone 4	zone3	zone 5	zone 6

4.8 Likes and dislikes about the town centres

4.8.1 The respondents were asked to identify what they most liked and disliked about the town centres. The most frequent responses are shown in Table 4.4. For Lisburn City Centre, *nothing,* and *close to home* were the most common likes, with the shops not featuring highly. Indeed, the *range and quality of shops* was top of the dislikes.

4.8.2 Being *close to home* featured strongly among the likes in the small towns, with *attractive environment* mentioned frequently among respondents from Hillsborough and Moira. Among the dislikes about the small towns, the *range and quality of shops* was mentioned most frequently in Carryduff. *Limited parking* was mentioned in Hillsborough and Moira, and *traffic congestion* heavily in Moira.

Table 4.4
Main reasons for visiting the town centre
Multiple responses allowed

Main reasons given	Lisburn City Centre	Carryduff TC	Dundonald TC	Hillsborough TC	Moira TC
Shopping generally	40%	7%	17%	26%	32%
Non-food shopping	30%	11%	15%	8%	
Walk around / browse	18%	10%			8%
Visit restaurants / cafés	18%			24%	24%
Visit financial & professional services	16%			13%	
Food shopping	15%	58%	66%	19%	26%
Visit other services (hairdresser etc)		14%	14%		
Buy take-aways		11%			
Visit pubs				17%	
from:	Council area	zone 4	zone3	zone 5	zone 6

Table 4.5
Most common likes and dislikes about the town centre
Multiple responses allowed

Most common likes	Lisburn City Centre	Carryduff TC	Dundonald TC	Hillsborough TC	Moira TC
Nothing in particular	33%	51%	24%		
Close to home	25%	35%	47%	36%	34%
Range/ quality of shops	14%				10%
Compact/shops close together	9%				
Pleasant to walk around	7%				
Attractive environment		4%	6%	35%	29%
Quiet/not busy			11%		
Friendly/ comnmunity atmosphere				19%	19%
Quality/ range of cafes & restaurants				13%	
Most common dislikes	Lisburn City Centre	Carryduff TC	Dundonald TC	Hillsborough TC	Moira TC
Range/ quality of shops	37%	40%	17%		
Nothing in particular	33%	40%	53%	31%	22%
Limited parking	11%		12%	28%	21%
Number of vacant shops	11%				
Expensive parking	4%				
Limited number of larger stores		8%			
Traffic congestion			10%	13%	45%
Inconvenient parking				13%	2%
from:	Council area	zone 4	zone3	zone 5	zone 6

4.9 Rating the town centres

4.9.1 The respondents were asked to rate their town centre on the six characteristics shown in Table 4.6, as *good/ average/ poor/* or *don't know*. The *range and quality of shops* was rated good in Moira, but in much lower proportions for Lisburn and Carryduff. A high proportion of respondents rated the range and choice of shops in Carryduff as poor. The range and choice of shops and the *quality of shops* in Lisburn City Centre was rated average by a large proportion of the respondents. The quality of shops in Moira and Hillsborough was rated good by over 80% of the respondents.

Table 4.6
Rating the town centre on selected features

	Lisburn City Centre	Carryduff TC	Dundonald TC	Hillsborough TC	Moira TC
Range and choice of shops					
Good	28%	22%	31%	37%	53%
Average	46%	6%	28%	50%	31%
Poor	26%	67%	38%	11%	11%
Don't know	1%	5%	2%	2%	6%
Quality of shops					
Good	40%	43%	34%	82%	81%
Average	48%	17%	34%	14%	11%
Poor	11%	36%	27%	1%	1%
Don't know	1%	5%	5%	3%	7%
Town centre environment					
Good	53%	24%	40%	94%	74%
Average	34%	20%	28%	4%	17%
Poor	12%	52%	26%	2%	2%
Don't know	1%	5%	6%	1%	8%
Parking - ease of availability of spaces					
Good	41%	52%	28%	3%	27%
Average	22%	26%	15%	28%	13%
Poor	30%	15%	47%	63%	51%
Don't know	6%	7%	10%	7%	8%
Cost of parking					
Good	29%	72%	66%	37%	74%
Average	33%	10%	7%	41%	1%
Poor	30%	1%	13%	14%	8%
Don't know	8%	17%	14%	9%	17%
As a pleasant place to visit					
Good	57%	36%	56%	98%	89%
Average	35%	36%	24%	1%	4%
Poor	7%	22%	15%	0%	1%
Don't know	1%	6%	5%	1%	6%
from:	Council area	zone 4	zone3	zone 5	zone 6

4.9.2 In Table 4.6, very high proportions of respondents rated the *town centre environment* of Hillsborough and Moira as good and over half those relating to Lisburn City centre rated it as good. Over half the respondents from Carryduff rated its town centre environment as poor.

4.9.3 On car parking, the table reveals that high proportions of respondents rated the *availability of spaces* as poor in the town centres of Dundonald, Hillsborough and Moira. In Lisburn, over 40% of respondents considered the availability of parking spaces as good. High proportions of respondents rated *the cost of parking* as good in the town centres of Carryduff, Dundonald and Moira, whereas in Lisburn it was mostly average/ good.

4.9.4 High proportions of respondents from Hillsborough and Moira rated their town centres as good in terms of '*a pleasant place to visit'*. In Lisburn, the proportion was lower, but still approaching 60%.

4.10 Town centre improvements

4.10.1 The respondents were asked to say what improvements to their town centre would make them visit more often. As indicated in Table 4.7, *more/ better shops generally* and *more/cheaper parking* featured in the responses on Lisburn City Centre.

4.10.2 In Carryduff, the focus was on *more/better food shops* and well as more/better shops generally. *More/ cheaper parking* was sought in Hillsborough and *less traffic congestion* sought in Moira.

4.11 Frequency of visit compared to the past and internet shopping

4.11.1 Table 4.8 reveals that most people visited their town centre at much the same frequency as they did two years ago, except the responses on Lisburn City Centre, where a sizeable proportion indicated less visits compared to the past, with 26% mentioning that the internet shopping had contributed to this change. The internet had very little influence on visits to the small towns

Table 4.7
What improvements to the town centre would make you visit more often?
Most frequently mentioned. Multiple responses allowed

Most mentioned improvements	Lisburn City Centre	Carryduff TC	Dundonald TC	Hillsborough TC	Moira TC
More / better shops generally	33%	26%	25%		11%
More/ cheaper parking	21%		22%	54%	18%
Nothing in particular	19%	55%	31%	23%	27%
More / better clothes & fashion stores	16%	10%	7%	7%	
More independent / specialist shops	6%				
Better restaurants and cafes		25%			
More/better food shops	8%	34%	11%		
Less traffic congestion			10%	7%	48%
from:	Council area	zone 4	zone3	zone 5	zone 6

Table 4.8
Compared to two years ago, how frequently do you visit the town centre?

	Lisburn City Centre	Carryduff TC	Dundonald TC	Hillsborough TC	Moira TC
More often than before	13%	8%	15%	21%	30%
About the same as before	50%	66%	72%	75%	56%
Less often than before	34%	22%	7%	3%	7%
Don't know	3%	5%	6%	1%	7%
from:	Council area	zone 4	zone3	zone 5	zone 6

4.12 Frequency of town centre visits in the evenings

4.12.1 The respondents were asked how often they visited their town centre in the evening. Table 4.9 shows that substantial proportions of respondents never visited in the evening, especially Lisburn City Centre, Carryduff and Dundonald town centres.

Significant proportions visited weekly in the small towns, but not so in Lisburn

4.13 Leisure activities in the town centres-evenings

4.13.1 Table 4.10 shows that eating and drinking were the most common activities undertaken. The proportion shown for

Table 4.9
Frequency of visit to the town centre in the evenings, after 6pm

Frequency of visit in the evenings	Lisburn City Centre	Carryduff TC	Dundonald TC	Hillsborough TC	Moira TC
Daily	0%	2%	2%	4%	16%
Between 2 and 6 times a week	2%	16%	6%	7%	10%
Weekly	3%	20%	19%	20%	17%
2-3 times a month	3%	13%	1%	15%	4%
Once a month	7%	0%	7%	16%	11%
Less frequently than once a month	15%	2%	6%	5%	9%
Never visit	69%	41%	57%	24%	25%
from:	Council area	zone 4	zone3	zone 5	zone 6

Table 4.10
Most frequently mentioned activities undertaken in the town centre in the evenings
Multiple responses allowed. Relates to hose who visited the town centre in the evenings

Most frequent activities	Lisburn City Centre	Carryduff TC	Dundonald TC	Hillsborough TC	Moira TC
Visit restaurants or cafés	44%	17%	46%	85%	48%
Late shopping (when open)	39%	56%	35%	9%	
Visit community cinema or theatre	31%		29%		
Use sports halls or gyms	9%	16%			
Buy take-aways	6%	24%	13%	9%	11%
Community hall activities/meetings			11%		
Visit pubs/ wine bars				46%	49%
Walking/ strolling				11%	20%
from:	Council area	zone 4	zone3	zone 5	zone 6

the City Centre may also include some respondents visiting restaurants around the LeisurePlex, not realising that these are outside the current City Centre boundary- see paragraph 3.6.2. In Lisburn City Centre, other popular activities included *late night shopping* and *going to the cinema*. Late night shopping was also popular in Carryduff and Dundonald. The high proportion in Carryduff may relate to the Spar shop and the off-licence shops. Visiting the cinema was also mentioned in Dundonald. *Buying take-aways* was mentioned by the respondents in relation to all the town centres. In Hillsborough, visiting restaurants was very frequently mentioned, and also visiting *pubs/ wine bars*. This was the case for Moira too.

4.14 Suggested improvements to the town centres

4.14.1 The respondents were asked what improvements to the town centres would make them visit more often- see Table 4.11. The majority could not suggest anything in particular. Otherwise, for Lisburn City Centre, more and better restaurants was mentioned most frequently, and late shopping. In Carryduff, it was more and better restaurants and more leisure facilities. In Dundonald, it was more/better restaurants and more pubs. For Hillsborough and Moira, the respondents had little to suggest.

Table 4.11
What improvements to the town centre would make you visit more often in the evenings?
Most frequently mentioned. Multiple responses allowed

Most mentioned improvements	Lisburn City Centre	Carryduff TC	Dundonald TC	Hillsborough TC	Moira TC
Nothing in particular	48%	45%	66%	72%	71%
More / better restaurants	17%	34%	16%	4%	3%
Shops open later	13%				
More / better pubs	7%		10%	14%	
More things to do generally	7%				6%
More leisure facilities		19%			
More evening events		7%	5%		
More / better cafes & coffee shops				5%	3%
from:	Council area	zone 4	zone3	zone 5	zone 6

4.15 Lisburn on-street interviews

4.15.1 As mentioned in section 1, on-street shopper interviews were conducted in the City Centre (200) and at Sprucefield, primarily to determine the proportion of shoppers coming from outside the Council area. There were a few questions on health-check matters, and the findings from the City Centre survey are shown in the following paragraphs.

4.16 Mode of travel

4.16.1 The respondents were asked how they travelled to the City Centre. Some 70% arrived by car, 13% came by bus and 12% walked, as shown in Figure 4.1.

4.17 Main reasons for visiting

4.17.1 The respondents were asked to give their main two reasons for visiting the City Centre. Mostly it was for food/ groceries and for clothes shopping- see Figure 4.1.

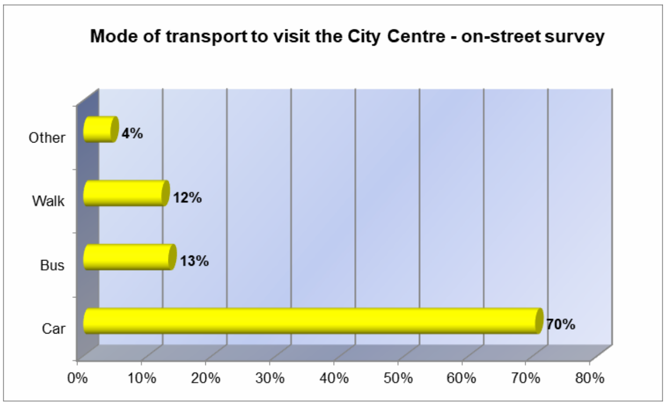
4.18 Frequency of visit

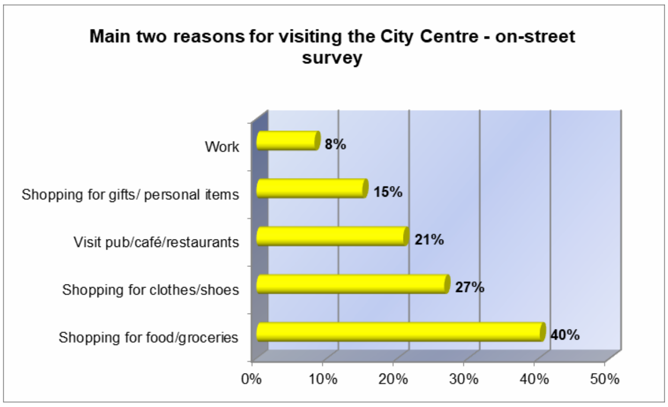
4.18.1 In response to the question on how often they visited the City Centre, the most frequent answers were: *twice weekly/ weekly* and *less frequently than twice a month*- see Figure 4.1

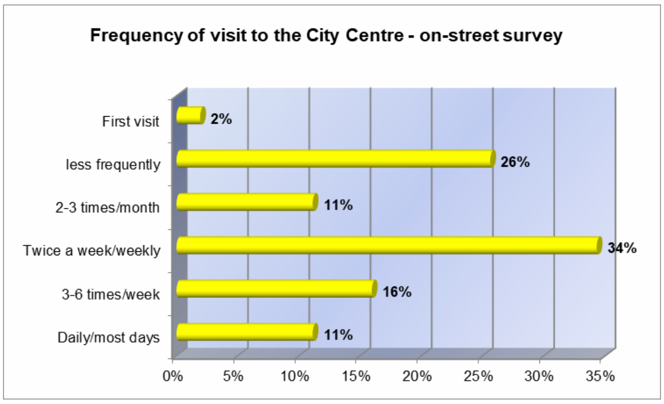
4.19 Frequency of visits to Sprucefield

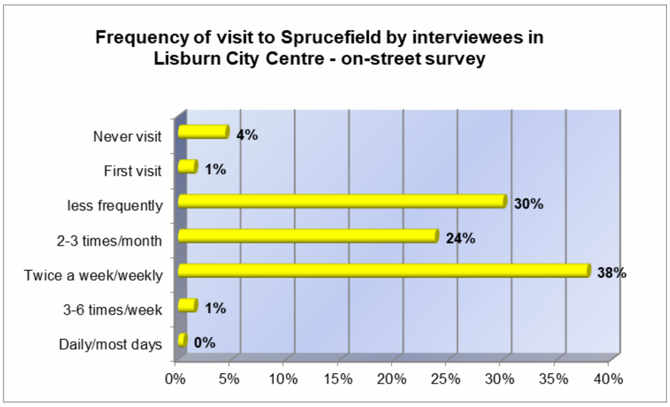
4.19.1 The respondents in Lisburn City Centre were also asked how often they visited Sprucefield, and the pattern of responses indicated that the *twice weekly/ weekly* and *less frequently than twice a month*- see Figure 4.1

Figure 4.1 Lisburn City Centre on-street interview surveys









5 Town centre health checks

5.1 Introduction

5.1.1 This section contains health check assessments for Lisburn City Centre and the town centres of Carryduff, Dundonald, Hillsborough and Moira It draws on the survey information provided in previous sections. There is a short explanation of the key performance indicators, followed by the health checks for each town centre in a single column format to assist presentation.

5.2 Key indicators

5.2.1 The key indicators applied in this study are based on the list of performance indicators on page 104 of the *Strategic Planning Policy Statement for Northern Ireland, September 2015* (SPSS), as follows:

- Diversity of uses
- Quality of built environment
- Recent/ proposed investment
- Accessibility
- Pedestrian flow counts
- Attitudes and perceptions
- Retailer representation and market demand
- Retail rents and commercial yields
- Vacancy rates
- Leisure and cultural facilities, including the evening economy
- Events
- Sense of place

5.2.2 **Diversity of uses**- information on the mix of land uses in the town centres is provided in section 3. Simple summary descriptions are provided in the health checks, based on the following range: *wide variety, medium variety and limited variety.*

5.2.3 **Quality of the built environment**- This indicator is applied in the form of a brief written description for each town centre, based on key physical features and perceptions from the interview surveys.

5.2.4 **Recent and proposed investment-** contains a brief description of significant development projects, public realm and regeneration initiatives.

5.2.5 **Accessibility-** indicates the ease with which the public can visit the town centres and move within them. It includes descriptions of the main infrastructure, including location on the road network and the levels of accessibility for each town centre to include car parking, pedestrian access, together with public perceptions from the interview surveys.

5.2.6 **Pedestrian footfall-** is a basic indicator of the vitality of town centres. Pedestrian counts were undertaken at selected points in Lisburn City Centre for the health checks by NEMS Market Research, including comment on previous counts.

5.2.7 **Attitudes and perceptions-** on the town centres is drawn from the interview survey findings in section 4. This provides valuable information on what the public see as key issues for the town centres.

5.2.8 **Retailer representation and demand-** is an indicator of the strength of the retail offer and demand in the town centres. The information is mainly drawn from section 3. Multiple retailer representation is expressed as: *nos. of multiple retailers/ (nos. of convenience and comparison retailers*) in this study. Multiple retailers include those with nine or more outlets (Experian). We have not included charity shops. Also, non-retail service multiples have not been included.

5.2.9 **Retail rents and commercial yields-** are measures of the market demand and the overall value of town centre premises as investments (lower yields reflect more valuable properties). For the small towns, commercial yields are fairly similar, and the estimated range is shown for each town in this section. CBRE contributed to assessment of the retail market for the health checks, including advice on rents and yields

5.2.10 **Vacancy rates-** are also an indicator of the market demand for town centre properties and a visible indicator of performance. Information is provided in section 3 for each of the town centres. For the health checks, vacancy rates are expressed as: *vacant units/ (retail units plus non-retail units and vacant units)*. The unit based approach allows comparison with national data.

5.2.11 **Cultural and social events-** are indicators which contribute towards the sense of identity associated with town centres, including community involvement. The main events associated with each town centre are listed.

5.2.12 **Leisure and cultural facilities, including the evening economy-** contribute to the range of land uses and vitality of the town centres. The main facilities are summarised, together with information on use and perceptions from the interview surveys.

5.2.13 **Sense of place-** is a subjectively expressed combination of the results of applying the other indicators, with an emphasis on the quality of environment, diversity of offer and social, historical and cultural associations. It is intended to distil the defining characteristics of any town centre into a few words or images.

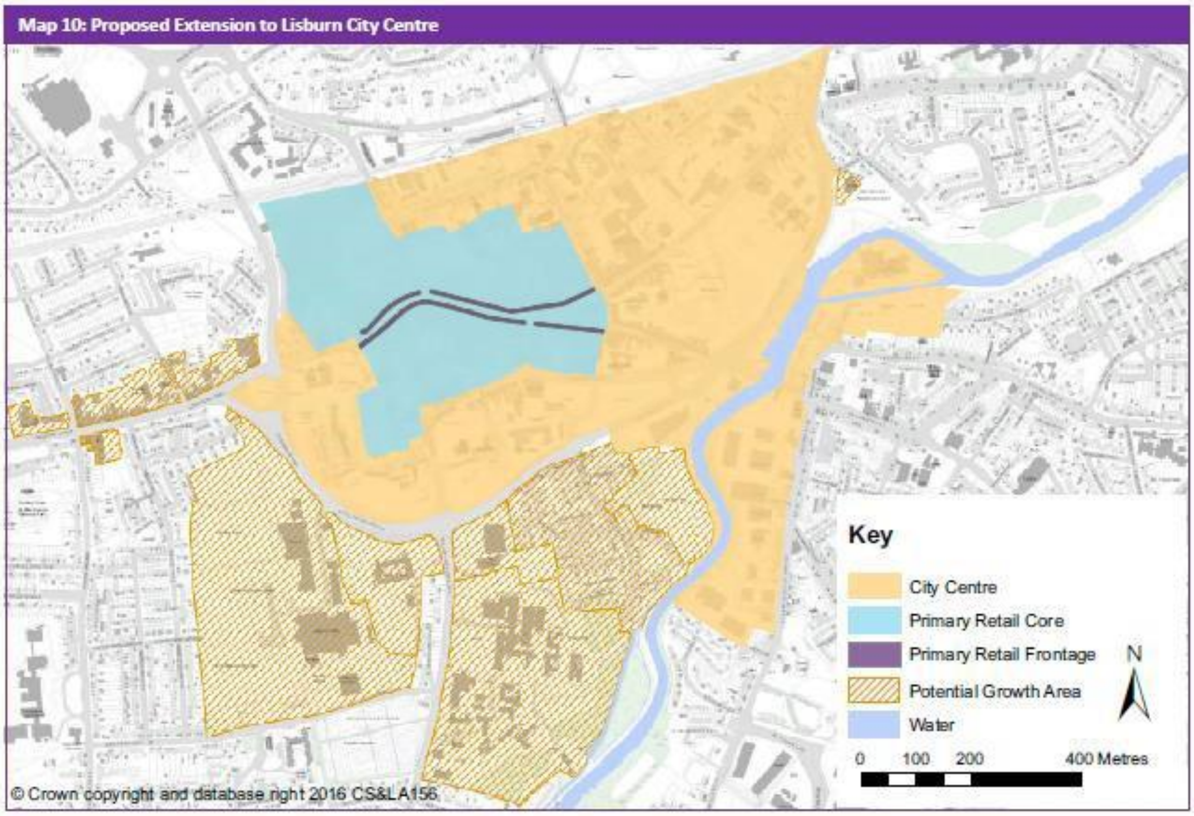
5.2.14 **SWOT analysis**- is provided in a table at the end, for each of the town centres. The aim is to highlight the main strengths, weaknesses, opportunities and threats.

5.2.15 **Preferred Options**- the implications of the health check assessments for the Preferred Options listed in section 1 are briefly set out for each town centre.

5.3 Lisburn City Centre health check

5.3.1 **Population-** around 45,400

5.3.2 The existing City Centre area is shown below, including the proposed extension to the City Centre boundary, as an extract from the LDP Preferred Options paper.



5.3.3 **Distribution of floorspace by activity-** is shown in detail in section 3 for the City Centre in Table 3.1 and the accompanying graphs which show the proportions by type of floorspace, with further breakdown by type of service activity in Table 3.2. The high proportion of floorspace devoted to comparison retail floorspace reflects the role of Lisburn City Centre as a major shopping centre within the framework of the Regional Development Strategy 2035 (RDS). The convenience floorspace is relatively limited. Most food shopping is undertaken at major out of centre supermarkets, as explained in section 3. The high proportion of other occupied floorspace comprising non-retail service uses, including leisure is also consistent with the role of the City Centre under the RDS. Trends in the mix of floorspace in the City Centre over the last five years are shown in Table 3.2, with explanation in the text of section 3, showing only a slight rise in the proportions of retail floorspace. The substantial rise in the proportion relating to restaurants, cafes, pubs and take-aways is important to the future of the City Centre in terms complementary support for the retail sector in attracting shoppers and visitors. Overall, Lisburn City Centre has a wide variety of land uses, which is a positive attribute.

5.3.4 **Quality of the built environment-** much of the City Centre is covered by a Conservation Area, which is one of three designated in the Council area. The recent AECOM health check for Lisburn City Centre in July 2017 gives a comprehensive appraisal of the quality of environment. It includes a summary of the positive and negative aspects of each of 22 different streets in the City Centre, together with photographs. Following these appraisals, the report describes Bow Street and Market Square as the 'highlights' of Lisburn in terms of environmental quality, and that both have benefited from significant investment in recent years which supports the level of retail viability in these locations, as indicated by the relatively the low level of vacancies. Although Antrim Street is part of the retail core of the City

Centre, the report describes it as being of a significantly lower grade in quality compared to Bow Street, and ‘road orientated’, but still well connected to the rest of the City Centre. In terms of the quality of public realm, the report considers Antrim Street, McKeown Street and Graham Gardens as the ‘lowest order’ found in the City Centre. Much of the paving is poor quality concrete, with a lack of street furniture and poor lighting. The report identifies the Jordan’s Mill car park as an unsightly major gap in the built-up frontages, which the consultants consider contributed to the under-performance of Antrim Street, as indicated by the poor environmental quality and high vacancy rates. In a survey of retailers for the AECOM study, nearly half the respondents thought that redevelopment of Jordan’s Mill should be the highest priority. The report concluded that a significant mixed-use scheme is needed on the site to regenerate the Antrim Street area. However, these issues should not detract from our overview of the quality of environment in the City Centre, which is good, which is a view shared by GL Hearn in their *Town Centres & Retailing Research Project*,*2014* for DOE Northern Ireland.

5.3.5 In the NEMS household survey, the quality of environment in the City Centre was rated as *good* by 53% of respondents, and *average* by 34% of respondents- see Table 4.6. It was also rated in similar proportions as a pleasant place to visit. The quality of environment barely featured in the questions on likes and dislikes about the City Centre, or among improvements that would make the respondents visit more often. Therefore, we conclude that future improvements to the environmental quality in the City Centre would best focus on selected areas of lower quality to achieve most benefits.

5.3.6 **Recent and proposed investment –** following completion of large-scale public realm works in Bow Street and Market Square in 2014, the Council has secured funding for the *Lisburn Linkages Project* (works during August 2018-November 2019), which will see improvements to the streets linking with Bow Street and Market Square. The streets include Bridge Street, Antrim Street, Railway Street, Castle Street, Seymour Street, Bachelor’s Walk and Market Place. The works will largely focus on upgrading footways, provision of street furniture and improved lighting, with work scheduled to commence this summer. The £3.7 million project is part funded by the Department of Communities (£2 million) and by the Council (£1.7 million). Other major planned investments are described briefly in other paragraphs by health check topic in this section relating to Lisburn

5.3.7 **Accessibility**- Lisburn is centrally situated on two Key Transport Corridors. The north/south corridor links Lisburn to Belfast and further north along the A8 to Larne and the M2 northwest to the International Airport. The A1 leads south from Lisburn to Hillsborough, Newry and the Republic of Ireland. The railway also links Lisburn to Belfast and further north, and to Moira and Newry to the south. The east/ west corridor links Lisburn to Moira along the M1, then to Eniskillen via the A4. The LDP Preferred Options paper contains proposed park and ride sites in Lisburn. It includes strategic road schemes to improve links between the M1 and A1 and the A24 Saintfield Relief Road, plus other priorities for Lisburn, including the Knockmore to M1 Link and the North Lisburn Feeder Road. Relocation of the Knockmore rail halt is proposed. The overall objectives seek to improve connectivity between the City and other town centres, and to Sprucefield, with a view to also encourage greater use of public transport. Within the City Centre, the pedestrianisation of Bow Street represents a major corridor drawing people through the commercial core. The current draft City Centre Masterplan by Ove Arup) includes consideration of various junction alignments and road improvements to support delivery of new development at Jordan’s Mill and Laganbank. In summary, the existing and proposed transport infrastructure will greatly reinforce future retail and leisure development potential in the City Centre. LCCC is preparing a Car Parking Strategy to review, and make recommendations on, the future of car parking in the City Centre.

5.3.8 The NEMS household survey showed that 81% normally use a car to visit the City Centre and 8% normally travel by bus (Table 4.2). There is a mix of off-street and on-street parking in the City Centre. The main car parks are listed in Table 5.2 and there are others situated nearby, outside the Centre boundary. Some 41% of respondents to the household survey rated the ease of availability of parking spaces as *good* and 22% as *average* (Table 4.6), which suggests scope for some improved provision. Some 29% rated the cost of parking as *good* and 33% rated it as *average*. Overall, parking in the City Centre appears fairly good and inexpensive, but with scope for further improvement as shown in Table 4.7. It did not appear as a contentious issue from the household survey.

Table 5.2
Lisburn City Centre Car Parks

Name/ location of car park	Spaces	Charge (where known)
Linenhall St	120	free
Union Bridge	15	free
Laganbank Rd	238	£1 for 2hrs
Quay St	23	free
Smithfield Sq	45	£1.40 for 2hrs
Barrack St	28	
Governors Rd	122	
Longstone St roundabout	69	
Antrim St	135	£1.40 for 2hrs
Bow St Mall	1,000	£1.80 for 2hrs

Source: Parkopedia online

5.3.9 **Pedestrian flow counts-** were undertaken by NEMS Market Research in Lisburn City Centre for this study. Counts were made over two days (Friday 1st and Saturday 2nd December 2017) and the figures grossed-up to provide weekly counts (a standard method). Eight count points were included, and these are illustrated in Appendix 5, which were also used in the recent AECOM study for the City Centre.

5.3.10 The busiest points were outside Eason's Books, 34 Bow Street and by the Danske Bank at 62-66 Bow Street and outside the Halifax on Bow Street, as shown on Table 5.1. The lowest counts were at the junction of Bridge Street and Market Lane and outside 5 Market Street. The counts confirm the attraction of Bow Street as the prime pitch in terms of footfall. Footfall counts in the AECOM study were presented on an hourly basis per day, by month over 2016/17. They recorded an average of 873 per hour on a Friday in December 2016 for all points, which is less than the count for Friday in Table 5.1, but close to the average of 834 per hour per week in the current study i.e. a fair correspondence.

Table 5.1
Lisburb City Centre: pedestrian flow counts at selected locations 2017

No.	***Suvey counts by NEMS Market Research***	**Friday 1st Dec** Average per day 9am-5pm	**Saturday 2nd Dec** Average per day 9am-5pm	**Week** Mon-Sat. Average per week
1	Danske Bank, 62-66 Bow Street	12,802	15,512	66,623
2	Del Toro Steakhouse, 19 Antrim Street	3,679	4,302	18,779
3	Eason's Books, 34 Bow Street	15,104	18,128	78,195
4	Coffee Incorporated, I Haslam Lane	6,098	6,320	29,220
5	Halifax, Bow Street	12,884	15,174	66,020
6	No. 5 Market Street	4,548	3,184	18,193
7	Shannon't Jewellers, 2-4 Market Square	5,026	5,860	25,615
8	Bridge Street at junction with Market Lane	2,906	4,552	17,549
	Average	**7,881**	**9,129**	**40,024**
	Average per hour	**985**	**1,141**	**834**

Note:
Detail on the NEMS flow counts is available in a separate document, accompanying this study The actual counts w ere from 10am-4pm w ith the periods 9am-10am and 4pm-5pm statistically modelled by NEMS.
The w eekly average derives from grossing-up of the counts for Friday and Saturday by a factor of 2.353, based on the method used by specialist footfall researchers PMRS.

5.3.11 **Attitudes and perceptions of the City Centre**- were recorded by the NEMS household survey, as shown for all the study towns in section 4. The most commonly stated reasons for visiting were for shopping generally (40%) and for non-food shopping (30%) and at a much lower level, food shopping (15%)- see Table 4.4. The range and choice of shops was rated as average by 46% of the respondents and the quality of shops by 48% of the respondents, as shown in Table 4.6. Shopping did not feature much among 'likes' about the City Centre, but it was the most frequently mentioned 'dislike'. Asked what would make them visit the City Centre more often, 33% mentioned more/better shops, 19% said nothing, and 16% mentioned more/ better fashion shops (see also paragraph on parking). On frequency of visit compared to two years ago, 50% said that they visited much the same, and 34% said less often (Table 4.8). Attitudes to other aspects of the City Centre appear under other headings in this section.

5.3.12 **Retailer representation and demand-** the retail market in the City Centre has been assessed in section 3. Multiple retailer representation is good at 38%, excluding charity shops. Retailer investment in the City Centre has remained steady, with recent increases in activity. There have been numerous store closures though, as in other town centres, partly generated by trends in online retailing and increased competition generally, especially at the budget end of the market and also from the much larger retail offer in Belfast. The main challenge will be to retain a strong retail offer in Lisburn City Centre in the context of competition from both the internet and Belfast, together with competition from any significant future expansion of Sprucefield as the regional centre. Expansion of Sprucefield would provide the sort of modern units which meet multiple retailer requirements more readily than possible in the City Centre. Therefore, the scope for increased retail offer in the City Centre is more likely to aim at modest levels of expansion, supported by an expanded leisure offer (see below), especially restaurants and cafes. Maintaining and improving the quality of retailing in the future will be of critical importance to continue the attraction of shoppers and visitors to the City Centre.

5.3.13 **Retail rents and yields-** Zone A retail rents are around £21-£45 per sq ft in Bow Street, £18- £34 per sq ft in Bow Street Mall and £14 per sq ft in Lisburn Square- see section 3. Commercial yields are around 6%

5.3.14 **Vacancy rates-** in the City Centre, the overall rate is 21% (unit basis), which is slightly higher than the vacancy rates in selected comparator towns. There are wide variations within this proportion, with 9% in the primary retail frontage areas (Bow Street/ Market Street and part of Chapel Hill), but over 30% vacant in Bow Street Mall and 48% in Lisburn Square.

5.3.15 **Cultural and social events-** Lisburn has a range of events throughout the year, in and around the City. These include: The Down Royal Horse Race Fixtures, N I Motorcycle Festival, the Q8 Oils Spring Farm & Construction Machinery Show at the Eikon Exhibition Centre, the Dubshed Car Show at the Eikon Centre (and other shows), the Coca Cola Half Marathon, and the Ulster Grand Prix. In Market Square, there are around 15 events inviting local people and visitors to participate, especially children. These include dancing and musical entertainment with food and drink, a vintage fair, a craft fair, carnival parade, gaming on a big screen among others.

5.3.16 **Leisure and cultural facilities, including the evening economy-** as described in section 3, Lisburn has a variety of restaurants, cafes, pubs, health and fitness establishments and the major leisure facilities at the LeisurePlex, including the cinema and bowling at Governor's Road. Principal attractions also include: the Irish Linen Centre and Lisburn Museum, Lisburn City Library, the Island Arts Centre, Castle Gardens, Lisburn Cathedral and visiting the Hidden Brewery Company.

5.3.17 Results of the household survey (Table 4.9) show that nearly 70% of the respondents never visited the City Centre in the evenings and 15% visited less than once a month. Among those who visited the City Centre, the most popular activities were visiting restaurants and cafes, late shopping and visiting the cinema. Most respondents could not identify any particular improvement that would make them visit more often, although more/ better restaurants featured- see section 3. The analysis indicates that more attractions are needed in the City Centre to generate increased footfall in the evenings, which in turn would attract more evening business.

5.3.18 **Sense of place-** Lisburn City Centre has a mostly good environment with well- defined built structure. It is a lively city with a wide variety of retail and non- retail services, including community and administrative uses. It hosts many events and attracts shoppers and visitors from beyond the Council area. It has a strong sense of place.

5.3.19 SWOT summary

Strengths	Weaknesses
• The City is at the top of the settlement hierarchy in the Council area	• Level of shop unit vacancies in parts of the City Centre
• Wide range of land use activities and diverse offer	• Limited new multiple retailer requirements currently
• Large retail offer with good multiple retailer representation – see qualification	• Need to strengthen the evening economy to attract more people at night
• Good/ growing range of services and leisure-related facilities, restaurants etc	• Need for further major redevelopments in the City Centre to improve urban form
• Steady level of retailer demand and supply of units	• Survey evidence that people want improvement to the range, choice and quality of shops
• Good level of leisure facilities around the City Centre	
• Attractive setting, including historic street environment in parts; Conservation Area	• Difficulties in providing retail space that meets modern retailer requirements in older properties
• Mostly good accessibility	
• Strong sense of place	
Opportunities	**Threats**
	• Uncertainty over future economic climate- effects on consumer spending and investment in the City
• Promote redevelopment projects emerging from the emerging Masterplan	• Survey opinion evidence that people are visiting the City Centre less often than two years ago
• Pursue improvements to the urban realm in locations already identified e.g. Lisburn Linkages	• Growing proportion of internet spending is a challenge to future retail floorspace requirements
• Redevelopment of Jordan's Mill site and promotion of development of gap sites	• Any reduction in effort to improve the commercial offer and environmental quality
• Complete planned traffic and transport works in the Preferred Options paper	• Potential for increased competition with Sprucefield, if it expands significantly
• Retailers to improvement the range and quality of offer	

5.4 Option 11 A - Preferred Option- Lisburn City Centre boundary

5.4.1 The Council's experience from other interview surveys is that many of the public perceive that the LeisurePlex, the cinema and the Lagan Valley Hospital are within the City Centre, regardless of the currently defined boundary for planning purposes. Therefore, an opportunity exists to capitalise on this perception by developing greater connectivity between the existing defined City Centre and the proposed expansion area. The leisure-related uses in the proposed extension area already partly complement the substantial retail offer in the City Centre. With re-enforced connectivity, there is potential to create a more unified City Centre over a wider area, that would strengthen the offer of Lisburn as a distinctive destination for locals and visitors alike. We stress that the creation of materially greater connectivity is needed to realise the opportunity. The health check provides evidence on the current state of the existing City Centre, together with broad market guidance on the mix of activities which is more likely to create long term prosperity. A new masterplan will be required in the future to cover the proposed expansion area and provide guidance on the desired mix of activities for an expanded City Centre. It will be for the Council to consider the future mix of land uses in the expansion area to ensure that they complement the existing City Centre and do not risk detracting from it.

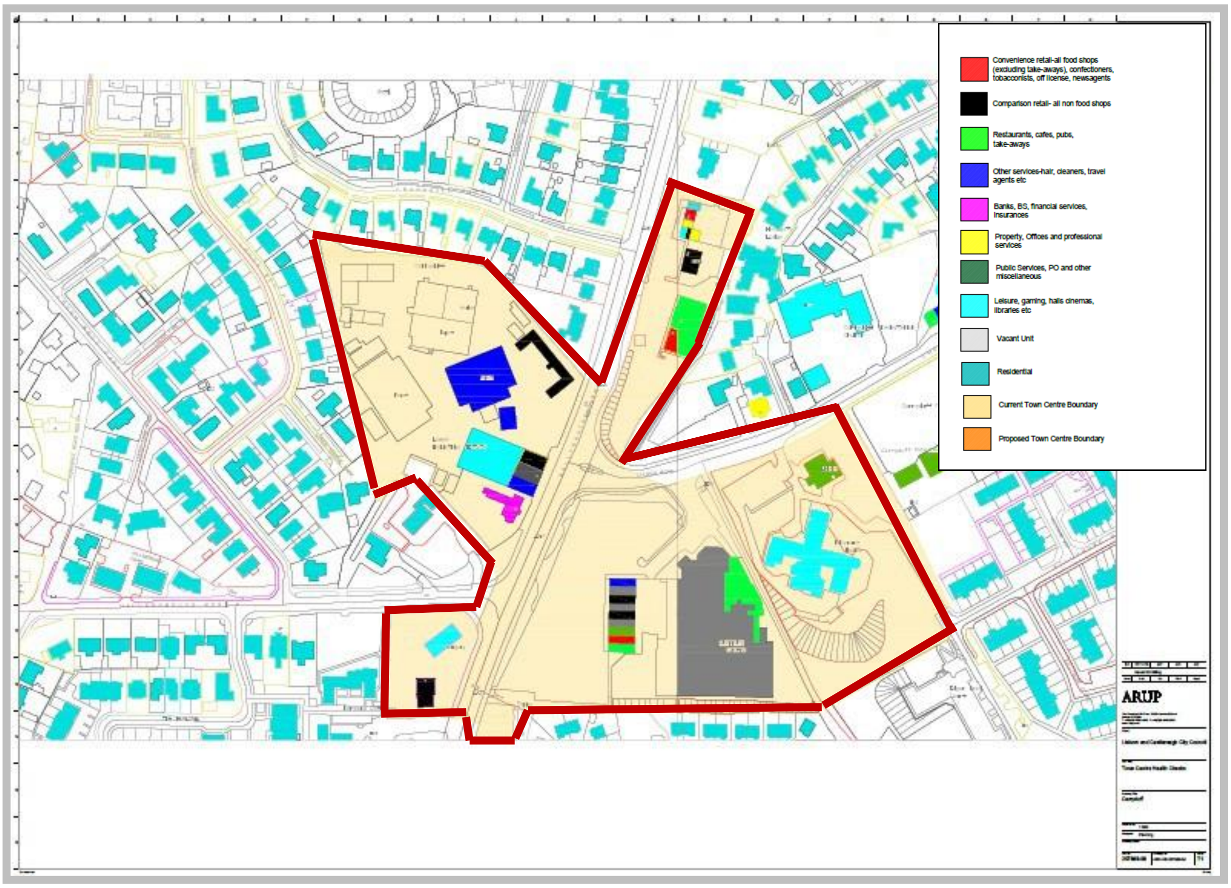
5.4.2 The findings of the Retail Capacity accompanying this report indicate forecast spare capacity of around £51 million convenience retail expenditure in the Lisburn catchment area over the next ten years. This would support modest additional levels of new convenience floorspace relating to the City Centre and in other centres within the Lisburn catchment. In the comparison sector, the forecast capacity is up to around £102 million, which mostly relates to potential new floorspace shared between the City Centre and Sprucefield, depending on future planning decisions on any future applications.

5.5 Carryduff Town Centre health check

5.5.1 **Population-** around 6,900

5.5.2 Carryduff is the only town within the Council area (excluding Lisburn City Centre) which has a designated town centre boundary incorporating existing uses that have a town centre function. The town centre, including the existing land uses identified by a survey for this study, is illustrated in Map 5.1, which matches the designated town centre boundaries. Carryduff is a town on the third tier in the hierarchy of settlements in the Council area, below the ‘greater urban areas’ and Lisburn at the top. Its role is to provide a range of range of services for residents of the town and its immediate hinterland.

Map 5.1 Carryduff Town Centre-see identified individual uses in Appendix 4



5.5.3 **Distribution of floorspace-** is shown in detail in section 3 for Carryduff town centre in Table 3.1 and the accompanying graph in Figure 3.1 which shows the proportions by type of floorspace, with further breakdown by type of service activity in Table 3.4. The mix of uses was determined from a street survey by Ove Arup for this study- see list in Appendix 4. The proportion of convenience retail floorspace is low (7%), comprising a Spar and two off-license shops. The proportion of comparison retail floorspace is also low (16%), which is to be expected for a small town. It includes a mix of independent retailers selling books, clothing and stores selling hardware and fittings orientated towards home improvements. Over 70% of the occupied floorspace is devoted to a mix of non-retail, community orientated services, as summarised in Table 3.4. The proportion is similar to those in Hillsborough and Moira. The current planning consent to redevelop the Carryduff Shopping Centre includes provision for a Lidl supermarket, which will greatly improve the convenience retail offer (see Retail Capacity Study). Other parts of the application include office units, residential, parking and landscaping. Overall, Carryduff town centre has a limited variety of land uses, which is common for a small town with a narrow role.

5.5.4 **Quality of the built environment-** is undistinguished generally, comprising rather tired-looking 1970s style commercial properties, with the bland Carryduff Shopping Centre development in the middle. The town centre is car-orientated and dominated by roads and tarmac. The immediate approaches to the shopping centre are low quality, caused by the commercial strip-style of development. The Google photographs below show the layout and character of the town centre, including a picture of the shopping centre and car parking. Works proposed in the current planning application for redevelopment of the Carryduff Shopping Centre will raise the quality of the existing buildings. Otherwise, the town centre is fringed with pleasant greenery and tightly enclosed by mainly good quality housing.

5.5.5 In the household survey (Table 4.6), 52% of the respondents rated the town centre environment as *poor*, although 72% rated it as *good/ average* as a pleasant place to visit. Nor did the environmental quality feature much as a ‘dislike’ about the town centre.

5.5.6 **Recent and proposed investment-** proposed redevelopment of the Shopping Centre

5.5.7 **Accessibility-** situated on the junction between the A24 and A9, the town has good road access north to Forestside Shopping Centre and on to Belfast, and south to Ballynahinch (A24) and to Saintfield and Downpatrick (A9). Carryduff is less well connected to Lisburn, via the relatively minor Comber Road.

5.5.8 The NEMS household survey showed that nearly half the respondents never visited the town centre. Among those who did visit, the frequency was quite high- daily and two or three times a week (Table 4.1). Most respondents spent less than one hour in the town centre (Table 4.3). The usage is consistent with its function and limited retail offer. Among those visiting the town centre, 81% normally used a car and 17% normally walked to it (Table 4.2). Car parking is concentrated around the shopping centre. Some 52% of the respondents rated the availability of parking as *good.* Therefore, parking does not appear as a significant issue for residents.

5.5.9 **Pedestrian flow counts-** no survey information.

5.5.10 **Attitudes and perceptions of the town centre**- were recorded by the NEMS household survey, as shown for all the study towns in section 4. The predominant reason for visiting Carryduff town centre was for *food shopping* (58%) and much lower levels, for visiting *other non-retail services* (14%) and *non-food shopping* (11%)- see Table 4.4. Among the 'likes' about the town centre, the most commonly mentioned was *close to home* (35%), with over half the respondents stating *nothing in particular*. The *range/quality* of shops featured most among the dislikes (40%)- see Table 4.5. The range and choice of shops was rated as *poor* by 67% of the respondents, but the quality of shops was rated as *good,* by 43% of the respondents, although 36% considered the quality as poor, as shown in Table 4.6. Asked what would make them visit the town centre more often, 34% mentioned *more/better food shops*, 26% said *more/ better shops generally*, 25% said *better restaurants and cafes* and 55% said *nothing in particular*- see Table 4.7. On frequency of visit compared to two years ago, 66% said that they visited much the same as before, and 22% said less often (Table 4.8). Attitudes to other aspects of the town centre appear under other headings in this section.

5.5.11 **Retailer representation and demand-** the limited retail representation in Carryduff town centre has been summarised under 'distribution of floorspace' in this section. There are two multiple retailers- Spar and Winemark. Multiple retailer representation is 18% on this basis- see Table 3.6. Among the comparison retailers, the stores include: Painters' Choice (decorating), Bookshop, McCall Tiles, Carryduff Hardware, Berlin Clothing, Steward Alarms, Interior Floor Design and a BPJ (interior fittings). The main addition will be the arrival of a Lidl store with redevelopment of the centre. CBRE report no recent known retail property transactions and they consider that the existing type of retail representation will continue to mainly serve residents in the immediate locality.

5.5.12 **Retail rents and yields-** CBRE estimate that current Zone A retail rents in Carryduff are likely to be around £10 per sq.ft, based on transactions in other small towns. Yields are 8%-9%.

5.5.13 **Vacancy rate-** in the town centre is 8%, which is higher than other small towns in the Council area, but not a critical issue for Carryduff- see Table 3.5.

5.5.14 **Cultural and social events-** there are very few significant events in Carryduff, as it is small and functions as a service centre for mainly local people. Events are small, such as those held at the Rockmount Golf Club, for example.

5.5.15 **Leisure and cultural facilities, including the evening economy-** the nearby Lough Moss Leisure Centre is the principal leisure facility in Carryduff. It has squash courts, a multi-function sports hall, dance studio, sauna, boxing studio, arts and crafts space, and multi-function meeting rooms. Also, there are outdoor pitches, an outdoor gym and trails. Leisure uses in the town centre are summarised in Table 3.4 and these include four eating places, including take-aways, grills and restaurants. There is also a betting shop and a library. The offering is aimed at local people, not visitors.

5.5.16 The town centre attracted a fair proportion of respondents visiting in the evenings (Table 4.9) and the most frequently mentioned activities were: late shopping (56%), buying take-aways (24%) and visiting restaurants/ cafes (Table 4.10). When asked what improvements would make them visit more, 45% said *nothing in particular*, 34% said *more/better restaurants* and 19% said *more/ better leisure facilities*- see Table 4.11

5.5.17 **Sense of place-** Carryduff town centre does not have much in the way of character to convey a sense of strong identity, but the household survey findings suggest that this is not an obstacle to how it functions as a service centre for local people.

5.5.18 SWOT summary

Strengths	Weaknesses
• Good accessibility	• Undistinguished quality of built environment – rated as poor by most in the survey
• Proposed redevelopment of the Shopping Centre to accommodate Lidl	• Poor range and choice of shops
• Attracts local people in the evenings	• Limited sense of place
• Good availability of car parking	
• Town mostly serves its localised function	
Opportunities	**Threats**
• Potential to improve the range and choice of shops	• Limited threats because of the proposed redevelopment of the Shopping Centre with Lidl will ensure continued local patronage
• Potential to improve appearance by public realm works, especially soft landscaping	• Any inaction towards improving the overall environmental quality may deter some customers in the future

5.6 Option 12 A - Preferred Option- Carryduff

5.6.1 The findings of the health check analysis support the Preferred Option that the existing boundary of Carryduff town centre is retained. Future retail demand is unlikely to materially grow beyond the current level of provision (including the proposed Lidl).

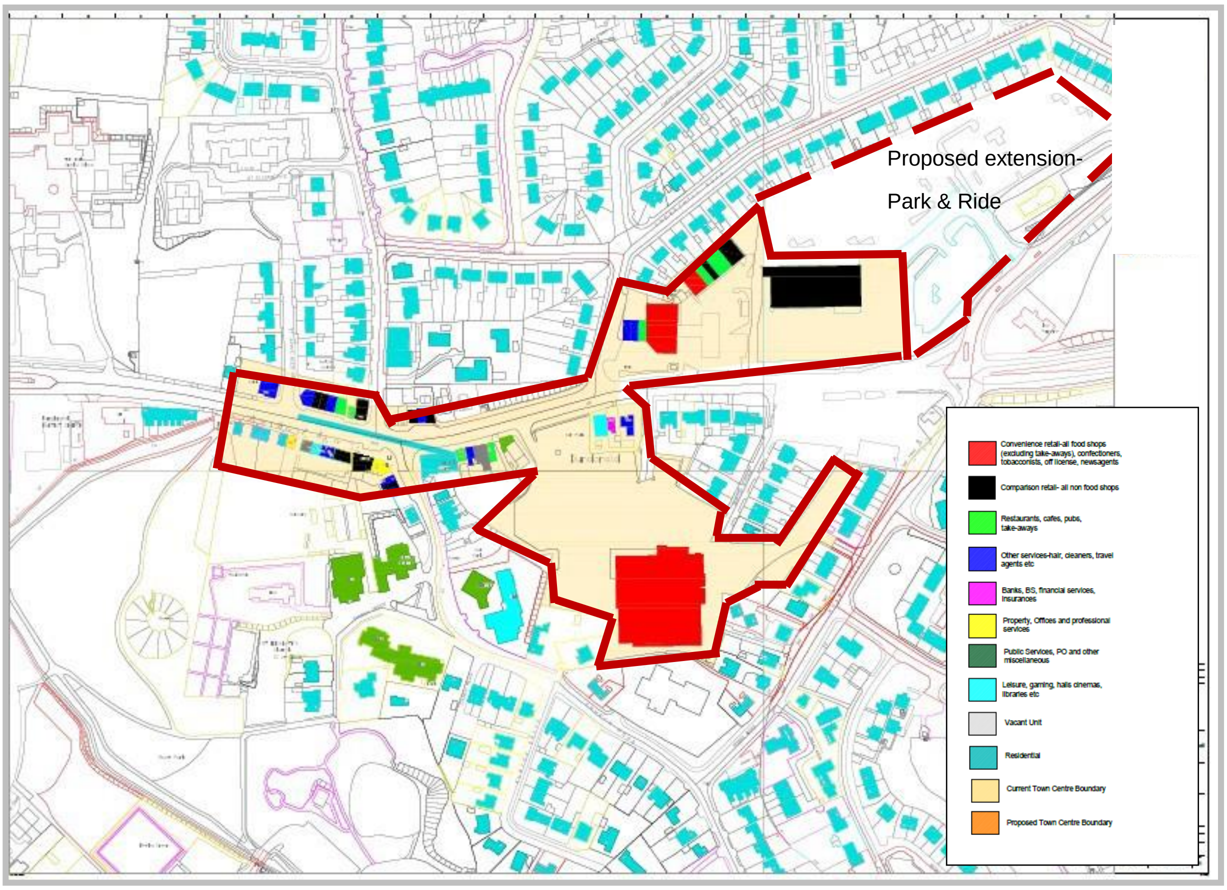
5.6.2 Results of the Retail Capacity Study accompanying this document contain forecasts of spare retail expenditure for the Forestside retail catchment area, which includes Carryduff. There is unlikely to be capacity to support for any significant increase in convenience floorspace in Carryduff, nor indeed from the market, once the Lidl store is developed. Some minor increases in comparison floorspace in Carryduff may be supported, but most of the forecast capacity will relate to the Forestside Centre, in whose catchment Carryduff is located.

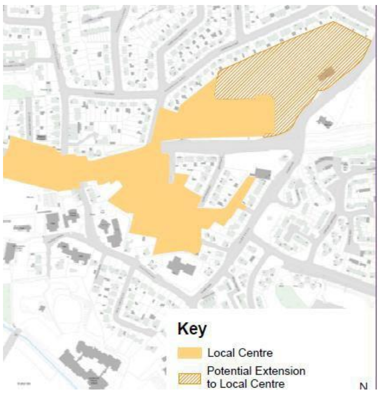
5.7 Dundonald Local Centre health check

5.7.1 **Population-** around 3,400 (Core area-Dundonald Wards). Retail catchment 19,100

5.7.2 Dundonald is classified as a local centre within the Castlereagh Greater Urban area, of which the latter is designated as a second-tier level in the hierarchy of settlements, with Lisburn at the top and the towns of Carryduff, Hillsborough and Moira as third tier. The local centre, including the existing land uses identified by the street survey for this study, is illustrated in Map 5.2. It follows the *proposed* boundaries of the centre as illustrated in the Preferred Options paper (there was no previously defined boundary). Under the Preferred Option 14A, it is proposed to extend the boundary of the local centre to the north east to include the park and ride site, as shown in map extract from the Preferred Options paper.

Map 5.2 Dundonald Local Centre-see identified individual uses in Appendix 4





5.7.3 **Distribution of floorspace-** is shown in detail in section 3 for the Dundonald local centre in Table 3.1 and the accompanying graph in Figure 3.1 which shows the proportions by type of floorspace, with further breakdown by type of service activity in Table 3.4. The mix of uses was determined by a street survey by Ove Arup for this study- see list in Appendix 4. The proportion of convenience retail floorspace is very high (40%), because of the presence of an ASDA supermarket. The proportion of comparison retail floorspace is moderate (26%), relative to the lower proportions in the other small towns. Other occupied non-retail service floorspace only accounts for 32% of the total, which indicates that the main function of the town centre is retailing, and the ASDA serves a much wider catchment than the core settlement population. The presence of B&M Bargains also contributes to the wider catchment. Most of the other shops are small independent operators, including a number of electronic cigarette retailers. The mix of non-retail services is summarised in Table 3.4. It includes a range of fast food and take-away outlets and numerous hairdressers. Overall, Dundonald local centre has a limited variety of land uses, which is common for a centre with a narrow role.

5.7.4 **Quality of the built environment-** the centre takes the form of a retail and commercial strip along Upper Newtownards Road, with the larger units (ASDA and B&M) set back with their car parking in front. It does not have the feel of being a town centre; more like part of the wider suburban area. The buildings are mainly two-storey, brick-built, interspersed with many gaps, which limits continuity and form of the built areas. The main through road (A20 to Newtownards) dominates the scene, with lots of traffic. The extensive store car parks and on-street bays and hard landscaping add a sense of harshness, which is offset to some extent by the pleasant Moat Park on the edge of the centre. The Google map and photograph below illustrate the layout and character of Dundonald local centre.

5.7.5 In the household survey (Table 4.6), 40% of the respondents rated the local centre environment as *good*, and 28% rated it as *average*. Some 56% of the respondents rated Dundonald local centre as *good* as a place to visit. These findings indicate that residents are mostly content with the quality of environment.

5.7.6 **Recent and proposed investment-**arrival of B&M store.

5.7.7 **Accessibility-** situated on the A20 linking Newtownards to Belfast, Dundonald enjoys good road access between these two centres, which is revealed in the shopping patterns in the Retail Capacity Study. The Park & Ride site shown on Map 5.2 has buses leaving every 20 minutes to Belfast City Centre. Lisburn is much further away from Dundonald and the linkages are less direct, with the consequence that Lisburn and Sprucefield attracts a low proportion of shoppers from Dundonald

5.7.8 The NEMS household survey showed that 19% of the respondents never visited the local centre. Among those who did visit, the frequency was quite high- daily and two or three times a week and weekly (Table 4.1), which will mainly be associated with trips to ASDA. Most respondents spent less than two hours in the local centre (Table 4.3). Among those visiting the local centre, 61% normally use a car and 30% normally walk to it, which is quite a high proportion (Table 4.2). Car parking is concentrated around the main stores, with some on-street bays. The ASDA car park, for example, has around 370 parking spaces. Some 28% of the respondents rated the availability of parking as *good* and 47% rated it as *poor*, which indicates that the parks are often busy. The cost of parking was rated as *good* by 66% of the respondents. Parking does not appear among the common likes and dislikes about Dundonald (Table 4.5).

5.7.9 **Pedestrian flow counts-** no survey information.

5.7.10 **Attitudes and perceptions of the local centre**- were recorded by the NEMS household survey, as shown for all the study towns in section 4. The predominant reason for visiting Dundonald local centre was for *food shopping* (66%) and much lower levels, for shopping generally (17%) and for *non-food shopping* (15%)- see Table 4.4. Among the 'likes' about the local centre, the most commonly mentioned was *close to home* (47%). Among the dislikes, 53% said *nothing in particular*. The range and choice of shops was rated as *good* by 31% of the respondents and poor by 38% of the respondents- see Table 4.6. The quality of shops was rated as *good* and *poor by the* respondents in broadly similar proportions. There it is fair to conclude that residents have mixed feelings about the retail offer in the Dundonald local centre. Asked what would make them visit the centre more often, 25% mentioned *more/better food shops*, and 22% said more/cheaper parking. Some 31% said *nothing in particular*- see Table 4.7. On frequency of visit compared to two years ago, 72% said that they visited much the same, and 15% said more often (Table 4.8), which could be caused by the arrival of B&M perhaps. Attitudes to other aspects of the local appear under other headings in this section.

5.7.11 **Retailer representation and demand-** the convenience retail representation in the Dundonald local centre is anchored by ASDA, and there is a EuroSpar supermarket and Winemark. The comparison retailers are: B&M, Annie's Orphans (charity shop), wallpaper shop, Creative Bathrooms, Medicare Pharmacy, Baby Luxe, Classic Blinds, Alterations (clothing) and three electronic cigarette shops. There are five multiple retailers, resulting in a multiple retailer representation of 36%, which is good for a small town-see Table 3.6. CBRE do not report any known retail market activity and transactions in the local centre.

5.7.12 **Retail rents and yields-** CBRE estimate that current Zone A retail rents in Dundonald are likely to be around £12- £13 per sq.ft, based on transactions in other small towns. Yields are 7%-8%.

5.7.13 **Vacancy rate-** in the town centre is 4%, which is very low, which indicates that market supply and demand for retail units is in balance-see Table 3.5.

5.7.14 **Cultural and social events-** there are few significant events in Dundonald

5.7.15 **Leisure and cultural facilities, including the evening economy-** the Dundonald International Ice Bowl and 10 pin bowling is the principal leisure facility nearby, together with an Omniplex cinema and David Lloyd Centre, with its tennis courts, gym, swimming pool, squash courts.

These facilities are outside the local centre. Leisure uses within the local centre are summarised in Table 3.4 and these include various pizza and take-away places, plus restaurants and a sub-way. There is also a library. The local centre attracted a limited proportion of respondents visiting in the evenings (Table 4.9) and the most frequently mentioned activities were: *visiting restaurants/ cafes* (46%), *late shopping* (35%). Some 46% never visited in the evenings- see (Table 4.10). When asked what improvements would make them visit more, 66% said *nothing in particular* and 16% said *more/better restaurants* and - see Table 4.11

5.7.16 Dundonald is also home to the Ulster Hospital, located not far from the local centre.

5.7.17 **Sense of place-** Dundonald local centre does not have a distinct character to convey a sense of strong identity, but the household survey findings suggest that this is not a particular concern for local people.

5.7.18 SWOT summary

Strengths	Weaknesses
• Presence of ASDA and B&M – and good multiple retailer representation	• Urban form has gaps and tarmac areas; car orientated
• Many local people rated the quality of environment as good – see qualification	• Limited variety of land use activities
• General accessibility is good	• Little character and sense of place
• Major leisure facilities nearby	• Busy car parks with local people reporting poor availability of spaces
• Low vacancy rate	
Opportunities	**Threats**
• Include Park & Ride site within the Local Centre boundary	• Few threats because of dominant presence of ASDA, but risk of small shop closures if quality not maintained
• Scope for improved landscaping	
• Improve quality of shops	

5.8 Option 14 A - Preferred Option- Dundonald

5.8.1 The Preferred Option is to incorporate the Park and Ride site within the local centre boundary. The site is likely to be generating additional trade for the stores and non-retail services in the local centre. Customers using the Park and Ride to Belfast, for example, are quite likely to shop at the stores in the local centre, after travelling to work, because they are so close to the site. Therefore, it is reasonable to include the site because it is supportive of the centre.

5.8.2 The findings of the Retail Capacity accompanying this report indicate forecast spare capacity to support only small increases in convenience and comparison floorspace in Dundonald.

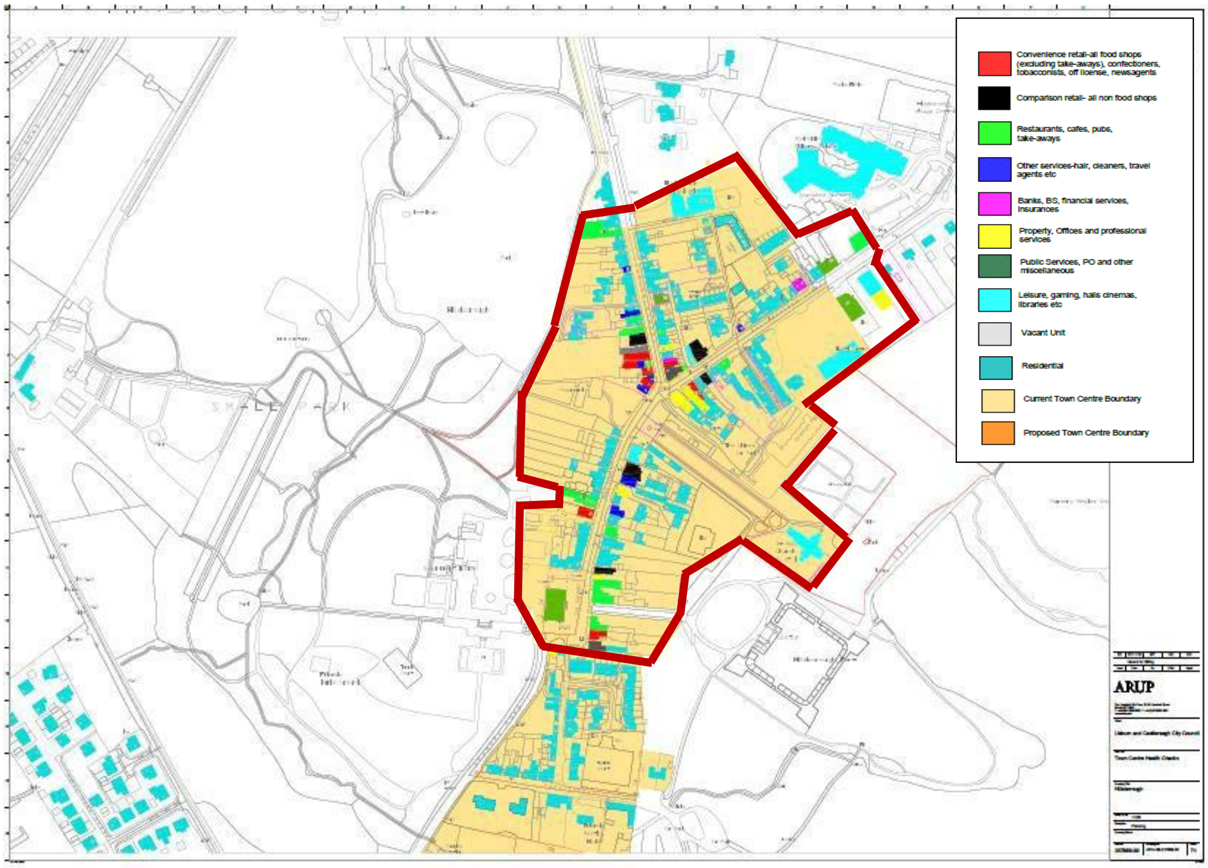
5.9 Hillsborough Town Centre health check

5.9.1 **Population-** around 4,000 (Hillsborough & Culcavy)

5.9.2 Hillsborough does not have a defined town centre boundary and the Council is seeking to establish definition of the town centre for the emerging LDP. While there is a *potential* town centre boundary shown in the Preferred Options paper, the Council is also considering the merits of defining the town centre boundary based on the Hillsborough Conservation Area under Preferred Option 12A. For the purposes of the health check study, Ove Arup undertook a street survey of Hillsborough to determine the extent of the area which best represents the town centre in terms of the concentration of retail and commercial activities and this area is illustrated in Map 5.3- see list in Appendix 4. Hillsborough is a town on the third tier of the hierarchy of centres in the Council area, and the area shown in Map 5.3 represents the collection of activities which have a 'town centre function'. Its role is to provide a range of range of services for residents of the town and its immediate hinterland.

5.9.3 A photographic image showing the Conservation Area boundary is shown overleaf. The area is much wider than that containing the core town centre functions serving residents, and the Conservation Area contributes towards the character of the town centre. Hillsborough Castle and grounds are mainly visitor attractions, rather than part of the provision of services to residents of the area. Expenditure by visitors will be drawn into the town centre, and contribute towards its vitality and viability, but the Castle and grounds are not part of the retail and commercial core functions, in the opinion of this study.

Map 5.3 Hillsborough Town Centre-see identified individual uses in Appendix 4



Hillsborough Conservation Area

5.9.4 **Pedestrian flow counts-** no survey information.

5.9.5 **Distribution of floorspace-** is shown in detail in section 3 for Hillsborough town centre in Table 3.1 and the accompanying graph in Figure 3.1 which shows the proportions by type of floorspace, with further breakdown by type of service activity in Table 3.4. The proportion of convenience retail floorspace is 15%, comprising a Co-op, Winemark and five other shops. The proportion of comparison retail floorspace is similar at 14%, which is to be expected for a small town. It includes a mix of independent retailers selling clothing, flowers, two pharmacies and other goods. Nearly 70% of the occupied floorspace is devoted to a mix of non-retail services, including many cafes/ restaurants, hairdressing/ beauty, professional and medical services as summarised in Table 3.4. The proportion is similar to those in Carryduff and Moira. Overall, Hillsborough town centre has a *good* variety of land uses for its size and role.

5.9.6 **Quality of the built environment-** is attractive, with orderly rows of mainly stone-built and harled properties either side of Main Street. Most of the buildings are two-storey, with higher buildings at the south end, around the entrance to Hillsborough Castle and grounds (which is designated as an Historic Park). The properties are well-maintained. There are a number of Listed Buildings and structures in the town centre. Hillsborough is set in a high quality, parkland landscape. In the household survey (Table 4.6), 94% of the respondents rated the town centre environment as *good*, and 98% rated it as *good as a* place to visit. These are high accolades. The attractive environment featured as one of the most frequently mentioned 'likes' about the town centre- see Table 4.5.

5.9.7 **Recent and proposed investment-** planned *Hillsborough Public Realm Scheme* (works from January 2019 to March 2020)

5.9.8 **Accessibility-** Hillsborough is situated close to the A1 which forms part of the north/south transport corridor which links Belfast and Lisburn, south to Newry and the Republic of Ireland. The A1 leads south from Lisburn to Hillsborough, Newry and the Republic of Ireland. Therefore, it is well connected by road to larger centres in Northern Ireland. There is limited parking along the narrow sections of Main Street, and some parking at the Visitor Centre by the entrance to the Castle. A car park at Ballynahinch Street provides 57 spaces.

5.9.9 The NEMS household survey showed that many respondents visited the town centre frequently. Some 32% visited between 2-3 times per week and 19% visited weekly and 13% visited daily-see Table 4.1. Most respondents spent up to two hours in the town centre (Table 4.3), which is a good indicator of vitality. Among those visiting the town centre, 72% normally use a car and 26% normally walk to it (Table 4.2). Some 63% of the respondents rated the availability of parking as *poor*-see Table 4.6. Parking also featured as the main 'dislike' about the town centre-see Table 4.5

5.9.10 **Pedestrian flow counts-** no survey information.

5.9.11 **Attitudes and perceptions of the town centre**- were recorded by the NEMS household survey, as shown for all the study towns in section 4. The predominant reason for visiting Hillsborough town centre was for *shopping generally* (26%) and to visit restaurants and cafes (24%) and for *food shopping* (19%)-see Table 4.4. The range and choice of shops was rated as *average* by half the respondents, and *good* by 37%. The quality of shops was rated as good by 82% of the respondents-see Table 4.6. Asked what would make them visit the town centre more often, 54% mentioned *more/cheaper parking, and* 23% *said nothing in particular*-see Table 4.7. On frequency of visit compared to two years ago, 75% said that they visited much the same as before, and 21% said more often (Table 4.8). Attitudes to other aspects of the town centre appear under other headings in this section. Overall, the attitudes and perceptions of the town centre were positive.

5.9.12 **Retailer representation and demand-** the retail representation in Hillsborough town centre has been summarised under ‘distribution of floorspace’ in this section. There are three multiple retailers- the Co-op, Spar and Winemark. Multiple retailer representation is 19% on this basis- see Table 3.6. Most of the retailers in the town centre are good quality independent operators. Other convenience retailers include: ER Wilson (greengrocer), Fosters and R Walker (both butchers), and Adairs’ Bakery. Among the comparison retailers, the stores include: VR Reany and Pattersons (two pharmacies), designer kitchen shop, a toy shop (Cheshire Cat), a ladieswear shop, a boutique clothing shop (Candy Plum), two bridal shops and a florist (Twigs & Twine). CBRE report no recent known retail property transactions. The stores will mainly serve residents, but also provide for visitors.

5.9.13 **Retail rents and yields-** CBRE estimate that current Zone A retail rents in Hillsborough are likely to be around £17-£18 per sq.ft, based on transactions in other small towns. Yields are 7%-8%.

5.9.14 **Vacancy rate-** in the town centre is 2%, which is very low and indicates a balance of supply and demand - see Table 3.5.

5.9.15 **Cultural and social events-** there are limited significant events in Hillsborough, although there is a Sunflower Fest nearby in the summer.

5.9.16 **Leisure and cultural facilities, including the evening economy-** the main attraction is Hillsborough Castle and gardens and the associated visitor centre. The town also has tennis courts and a Village Centre where minor local events are organised. Leisure uses in the town centre are summarised in Table 3.4 and these include 13 eating places, including cafes, bars, restaurants and take-aways. There are also three community-related halls for various activities and meetings. The town centre attracted a fair proportion of respondents visiting in the evenings (Table 4.9). Only 24% said that they never visited the town centre. The most frequently mentioned activities were: *visiting restaurants/ cafes* (85%) and *visiting pubs and wine bars* (46%), which explains the high level of provision of these facilities in the town. When asked what improvements would make them visit more, 72% said *nothing in particular*, and 14% mentioned *more/better pubs*. - see Table 4.11.

5.9.17 **Sense of place-** Hillsborough town centre is an attractive historical location with a strong character.

5.9.18 SWOT summary

Strengths	Weaknesses
• Historic town with Conservation Area	• Limited multiple retailer representation
• Visitor destination and a pleasant place to visit generally.	• Few events
• Attractive town centre environment	• Few leisure facilities
• Good range of quality independent shops	• Parking availability issues
• Low vacancy rate	
• Good range of restaurants and cafes	
• Strong character and sense of place	
Opportunities	**Threats**
• Potential for more events and cultural activities to support Hillsborough as a destination, including marketing initiatives	• Increasing competition from other centres, including visitor attractions
• Maintain quality of shops	
	• Any reduction in effort to improve the commercial offer and environmental quality

5.10 Option 12 A - Preferred Option-Hillsborough

5.10.1 The findings of the health check analysis enable definition of a town centre boundary which embraces the main retail and commercial activities which serve a town centre function in terms of the role of Hillsborough in the retail hierarchy. This area is concentrated, and it does not extend to the Conservation Area boundary.

5.10.2 Results of the Retail Capacity Study accompanying this document contain forecasts of spare retail expenditure to support additional convenience and comparison floorspace in the Lisburn catchment area, which includes Hillsborough. While most of the spare capacity will relate to opportunities in Lisburn and at Sprucefield, there would be support for small additions to the retail floorspace in Hillsborough.

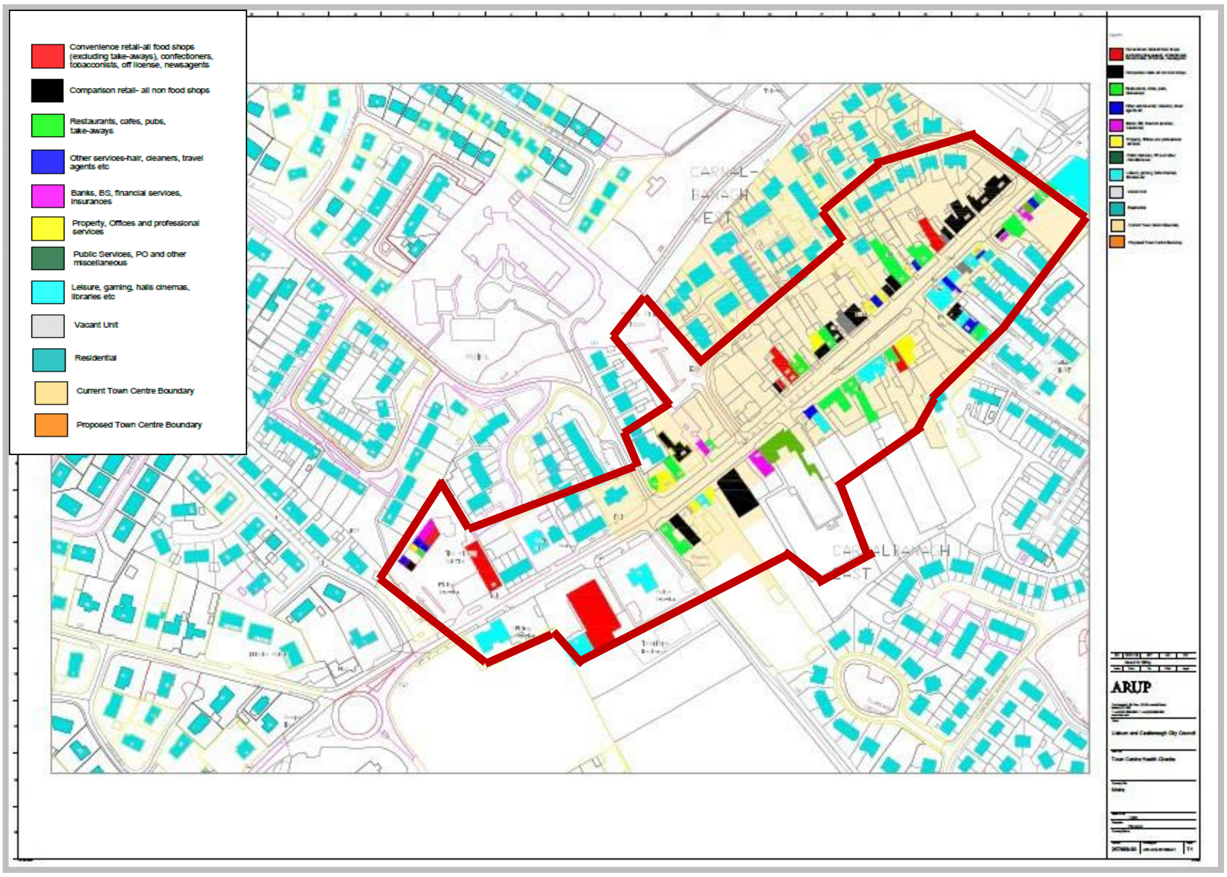
5.11 Moira Town Centre health check

5.11.1 **Population-** around 4,900

5.11.2 Moira does not have a defined town centre boundary and the Council is seeking to establish definition of the town centre for the emerging LDP. While there is a *potential* town centre boundary shown in the Preferred Options paper, the Council is also considering the merits of defining the town centre boundary based on the Moira Conservation Area under Preferred Option 12A. For the purposes of the health check study, Ove Arup undertook a street survey of Moira to determine the extent of the area which best represents the town centre in terms of the concentration of retail and commercial activities and this area is illustrated in Map 5.4- see list in Appendix 4. Moira is a town on the third tier of the hierarchy of centres in the Council area, and the area shown in Map 5.4 represents the collection of activities which have a 'town centre function'. Its role is to provide a range of range of services for residents of the town and its immediate hinterland.

5.11.3 A photographic image showing the Conservation Area boundary is shown overleaf. The area is wider than that containing the core town centre functions serving the residents, and the Conservation Area contributes towards the character of the town centre. The town centre boundary in Map 5.4 represents the retail and commercial uses which are 'town centre' functions of Moira in the opinion of this study. Therefore, it excludes most of the areas of housing in the Conservation Area.

Map 5.4 Moira Town Centre-see identified individual uses in Appendix 4



Moira Conservation Area

5.11.4 **Pedestrian flow counts-** no survey information.

5.11.5 **Distribution of floorspace-** is shown in detail in section 3 for Moira town centre in Table 3.1 and the accompanying graph in Figure 3.1 which shows the proportions by type of floorspace, with further breakdown by type of service activity in Table 3.4. The proportion of convenience retail floorspace is 13%, comprising a SuperValu store and six other shops. The proportion of comparison retail floorspace is higher at 19%, which is to be expected for a small town. Aside from Boots, it includes a mix of independent retailers, including several clothing shops, a department store, florist and others. Two thirds of the occupied floorspace is devoted to a mix of non-retail services, including many cafes/ restaurants, hairdressing/ beauty, opticians, property agents and other professional services as summarised in Table 3.4. The proportion is broadly similar to those in Carryduff and Hillsborough. Overall, Moira town centre has a *good* variety of land uses for its size and role.

5.11.6 **Quality of the built environment-** is attractive, with rows of mainly stone-built and harled properties colourfully painted on either side of Main Street. Most of the buildings are two-storey. There are attractive areas of tree planting along stages of Main Street. The properties are well-maintained. There are a number of Listed Buildings and structures in the town centre, plus the sites of two forts nearby (Pretty Mary's Fort and Claremont Fort) which are historic landmarks. The town centre is mostly fringed with low rise housing in good order, and the wider setting includes extensive agricultural and parkland areas. In the household survey (Table 4.6), 74% of the respondents rated the town centre environment as *good*, and 89% rated it as *good as a* place to visit. The attractive environment featured as one of the most frequently mentioned ‘likes’ about the town centre- see Table 4.5.

5.11.7 **Recent and proposed investment-** none noted in the town centre

5.11.8 **Accessibility-** Moira is situated on the A3 which leads south west from Moira to Portadown and Armagh. It is also close to the M1 east/ west corridor linking Lisburn with Eniskillen. The railway also links Moira to Lisburn. The A3 is a busy road with limited on-street parking in the town centre, but there are a number of bays. In many places, it is difficult to stop on Main Street and there are no major public car parks in the town centre.

5.11.9 The NEMS household survey showed that many respondents visited the town centre frequently. Some 48% visited between daily and 2-3 times per week combined. Also, 28% of the respondents said that they never visited the town centre- see Table 4.1. Most respondents spent up to two hours in the town centre (Table 4.3), which is a good indicator of vitality. Among those visiting the town centre, 58% normally use a car and 35% normally walk to it (Table 4.2). Unsurprisingly, 51% of the respondents rated the availability of parking as *poor-* see Table 4.6. Parking also featured as the main ‘dislike’ about the town centre, but the main complaint was traffic congestion, mentioned by 45% of respondents-see Table 4.5.

5.11.10 **Pedestrian flow counts-** no survey information.

5.11.11 **Attitudes and perceptions of the town centre**- were recorded by the NEMS household survey, as shown for all the study towns in section 4. The predominant reason for visiting Moira town centre was for *shopping generally* (32%) and to visit restaurants and cafes (24%) and for *food shopping* (26%)-see Table 4.4. The range and choice of shops was rated as *good* by 53% of the respondents, and *average* by 31%. The quality of shops was rated as good by 81% of the respondents- see Table 4.6. Asked what would make them visit the town centre more often, 48% mentioned less traffic congestion and 18% said *more/cheaper parking, and* 27% *said nothing in particular*-see Table 4.7. On frequency of visit compared to two years ago, 56% said that they visited much the same as before, and 30% said more often, which is a positive sign (Table 4.8). Attitudes to other aspects of the town centre appear under other headings in this section. Overall, the attitudes and perceptions of the town centre were positive, apart from traffic congestion/ parking issues.

5.11.12 **Retailer representation and demand-** the retail representation in Moira town centre has been summarised under ‘distribution of floorspace’ in this section. There are four multiple retailers- SuperValu, Centra and Winemark, and Boots. Multiple retailer representation is 17% on this basis- see

Table 3.6. Most of the retailers in the town centre are good quality independent operators. Other convenience retailers include: two butchers, a greengrocer (The Barrow) and a baker. Among the comparison retailers, the stores include seven clothing shops, florist, interior décor shop, gift shop and a department store (Jacksons of Moira). CBRE report three recent retail property transactions, all in 2016. The stores will mainly serve local residents, but also provide for visitors. Overall, there are a lot of shops and services in Moira.

5.11.13 **Retail rents and yields-** CBRE estimate that current Zone A retail rents in Moira are likely to be around £12-£13 per sq.ft, based on local transactions and those in other small towns. Yields are 8%-9%.

5.11.14 **Vacancy rate-** in the town centre is 2%, which is very low and indicates a balance of supply and demand - see Table 3.5.

5.11.15 **Cultural and social events-** there are few events, but Moira runs a Speciality Food Fair in the summer and there is also a musical festival – Moira Calling.

5.11.16 **Leisure and cultural facilities, including the evening economy-** there are few leisure activities in Moira involving fitness or culture, for example. Leisure uses in the town centre are focussed on eating and drinking as indicated in Table 3.4. These include 16 eating places, including cafes, bars/ pubs, restaurants and take-aways. There is a fitness centre and a few church halls. The town centre attracted a fair proportion of respondents visiting in the evenings (Table 4.9). Only 25% said that they never visited the town centre. The most frequently mentioned activities were: *visiting restaurants/ cafes* (48%) and *visiting pubs and wine bars* (49%), which explains the high level of provision of these facilities in the town. When asked what improvements would make them visit more, 71% said *nothing in particular*, with few other responses in significant proportions - see Table 4.11.

5.11.17 **Sense of place-** Moira town centre is attractive, and the small town has a strong identity.

5.11.18 **SWOT summary** (similar to that for Hillsborough)

Strengths	Weaknesses
• Historic town with Conservation Area	• Limited multiple retailer representation
• Visitor destination and a pleasant place to visit generally.	• Few events
• Attractive town centre environment	• Few leisure facilities
• Good range and quality independent shops and lots of them	• Parking availability issues
• Low vacancy rate	• Traffic congestion
• Good range of restaurants, cafes and pubs	
• Strong character and sense of place	
Opportunities	**Threats**
• Potential for more events and cultural activities to support Moira as a destination, including marketing initiatives	• Increasing competition from other centres, including visitor attractions
• Maintain quality of shops	
	• Any reduction in effort to improve the commercial offer and environmental quality

5.12 Option 12 A - Preferred Option- Moira

5.12.1 The findings of the health check analysis enable definition of a town centre boundary which embraces the main retail and commercial activities which serve a town centre function in terms of the role of Moira in the retail hierarchy. This area is concentrated, and it does not extend to the Conservation Area boundary.

5.12.2 Results of the Retail Capacity Study accompanying this document contain forecasts of spare retail expenditure to support additional convenience and comparison floorspace in the Lisburn catchment area, which includes Moira. While most of the spare capacity will relate to opportunities in Lisburn and at Sprucefield, there would be support for small additions to the retail floorspace in Moira.

6 Summary

6.1 Lisburn City Centre

6.1.1 The City is top of the settlement hierarchy in the Council area. The City Centre has a wide diversity of land use activities which is consistent with its role as a major retail, commercial and administrative centre. It has an attractive setting, including historic street environments. However, there are gap sites and other areas of poorer urban form which require investment.

6.1.2 The multiple retailer representation is good, but evidence from the household survey indicates that there needs to be improvement to the range, choice and quality of the shops. Retailer demand has been at a modest, steady pace in recent times.

6.1.3 There is also a good range of leisure-related services in the City Centre, including restaurants/ cafes and bars, and that this sector has grown in recent years, with expectation of further growth. Also, there is a good level of major leisure facilities around the City Centre. Completion of the various traffic improvement projects in and around the City Centre, together with urban realm projects such as the Lisburn Linkages, will assist promotion of Lisburn as a destination.

6.1.4 Promotion of further large redevelopment schemes is needed, notably those in the emerging new Masterplan, including the Jordan's Mill site and others. Main potential threats to the future of the City Centre include competition from internet retailing and from other centres. Expansion of the defined City Centre into the area shown under Option 11A provides the opportunity to include the major leisure uses, and other uses, to complement the retail offer in the existing City Centre. This opportunity would strengthen the offer of Lisburn as a distinctive destination for locals and visitors alike. A key proviso is that materially improved connectivity is achieved between the proposed expansion area and the existing City Centre.

6.1.5 The findings of the Retail Capacity Study reveal forecast expenditure capacity to support additional new convenience and comparison retail floorspace in the City Centre. The forecasts of capacity would be shared, though, with any future development expansion opportunities at Sprucefield, and the split would be partly determined by planning decisions of future applications.

6.2 Carryduff Town Centre

6.2.1 The town centre provides a functional offer to residents in terms of mainly small shops and services, including basic eating places/ take-aways which attract patronage, but with rather little else to do. Redevelopment of the Shopping Centre, to include Lidl, is likely to secure its future, but some improvement to the range and choice of other shops is needed too. It would benefit from landscaping works. While there is some spare expenditure capacity, future market interest is unlikely to extend beyond minor additions to the retail floorspace after the Shopping Centre redevelopment. No change to the existing town centre boundary is needed, which accords with Preferred Option 12A.

6.3 Dundonald Local Centre

6.3.1 The local centre is anchored by ASDA and there is good multiple retailer representation for its size, although there is scope for improvement to some of the shops. Accessibility is good, especially with its Park & Ride site. The retail vacancy rate is low. Major leisure facilities are located nearby. Less positive aspects are the poor urban form and limited variety of land use activities, and these include various eating places. Also, the local centre appears rather characterless. It would benefit from landscape improvements. The findings of the Retail Capacity Study suggest support for only limited increases in retail floorspace in Dundonald. The Park & Ride facility will be assisting with the generation of trade, so its inclusion within the local centre boundary would be appropriate under Option 14A.

6.4 Hillsborough Town Centre

6.4.1 This is an attractive historic town centre which combines a high quality of environment with good range of independent retailers and numerous cafes, and restaurants.

The low vacancy rate indicates that demand for units matches supply. The town has few leisure facilities and few events. More of these would strengthen its attraction as a destination for visitors. An important consideration is that the quality of the shops needs to be maintained, especially in face of competition from other visitor destinations. The findings of the Retail Capacity Study indicate scope for small additions to the current retail floorspace. This study has presented a defined town centre boundary for Hillsborough in accordance with Preferred Option 12A.

6.5 Moira Town Centre

6.5.1 Moira town centre shares many of the characteristics of Hillsborough town centre, from the perspective of the health check assessment, so they are not repeated in this paragraph. One difference is that problems with parking availability and traffic congestion are perceived as issues from the household survey. Also, the centre is considerably larger with more retail and service units than Hillsborough. The findings of the Retail Capacity Study indicate scope for small additions to the current retail floorspace. This study has presented a defined town centre boundary for Moira in accordance with Preferred Option 12A.

Appendix 1

Household survey zones and questions on use and perceptions of the town centres

NEMS household survey 2017

The Council area was divided into six zones and quotas of interviews were undertaken in each zone. The zone map is shown overleaf

Lisburn & Castlereagh: Zone populations and interview quotas

		Population 2016		Interview quotas	
Zone	Name	Nos.	%	Proportion	Adjusted
1	Lisburn/ Sprucefield	75,198	53%	586	530
2	Forestside	15,093	11%	118	120
3	Dundonald	19,123	14%	149	150
4	Carryduff	8,883	6%	69	100
5	Hillsborough	12,511	9%	97	100
6	Moira	10,373	7%	81	100
Total Lisburn & Castlereagh Coumcil area		**141,181**	**100%**	**1,100**	**1,100**

Note:

Zones are based on groups of SOAs (super output areas) from NISRA- online interactive maps

The total for Zone 1 (Lisburn & Sprucefield) derives from the NISRA total for the Council area, less the data for Zones 2-5)

Questions asked in relation to the respondents' use and perceptions of the town centres. For Lisburn City Centre, the respondents were from the whole Council area. For Carryduff, Dundonald, Hillsborough and Moira, the respondents were from the zone within which the town is located. See overleaf.

	The respondents were asked about the main town centre in the catchment in which they live : *LisburnCity Centre, Carriduff TC, Dundonald TC, Hillsborough TC, Moira TC*
Q16	How often do you visit… Town Centre, on average?
Q17	Why don't you visit ….Town Centre?
Q18	How do you normally travel to …….. Town Centre?
Q19	What typically, are your main reasons for visiting …….. Town Centre - i.e. what range of things do you do when you get there? (MR)
Q20	On average, how long do you normally spend in ………. Town Centre when you visit?
Q21	What do you LIKE MOST about …….. Town Centre for shopping and as a place to visit generally? [MR]
Q22	What do you DISLIKE MOST about …….. Town Centre for shopping and as a place to visit generally? [MR]
Q23	Overall, how do you rate ………. Town Centre on the following aspects as 'Good', 'Average' or 'Poor'? [MR/PR] *Range and choice of shops* *Quality of shops* *Town centre environment* *Parking availability* *Cost of parking* *As a pleasant place to visit*
Q24	What improvements to ….Town Centre would make you visit there more often?
Q25	Compared to two years ago, how frequently do you visit ………. Town Centre now? [PR] *More often/ about the same/ less often/ don't know*
Q26	Has your internet shopping contributed towards your reduced visits to Dumfries Town Centre Town Centre?
Q27	On average, how often do you visit …….. Town Centre in the evenings - i.e. after 6pm?
Q28	Do you undertake any of the following leisure related activities when you visit …….. Town Centre in the evenings? [MR/PR] *Visit restaurants or cafés* *Buy take-aways* *Visit pubs / wine bars* *Visit community cinema or theatre* *Walking about / strolling* *Use sports halls or gyms* *Swimming* *Community hall activities / meetings* *Late shopping (when open)* *Indoor bowling* *Attending events* *Attending exhibitions* *Other*
Q29	What would make you visit ………. Town Centre more often in the evenings? [MR]
GEN	Gender of respondent.
AGE	Which of the following age ranges do you fall in to?
PC	Postcode sector of home address
Note:	*MR means multiple responses allowed. PR means prepared response (choice form specified options)*

Six Survey Zones

Appendix 2

Recent retail and service arrivals in Lisburn City Centre (CBRE)

New Entrants

Jan – Jun 2015			
Entrant	*Use*	*Month*	*Location*
ACES Jewellers	Jewellers	April '15	Bow Street Mall
Bob and Berts	Café	May '15	Bow Street
Ziggicig	Vaping	May '15	Antrim Street
July – Dec 2015			
Entrant	*Use*	*Month*	*Location*
Warren James	Jewellers	Jun '15	Bow Street Mall
Simply Fish	Restaurant	Jul '15	Bow Street
Abbey Insurance	Financial	Nov '16	Market Place
Digital Circle	Digital	Nov '15	Bow Street Mall
Jan – Jun 2016			
Entrant	*Use*	*Month*	*Location*
V&V Nail Bar	Beautician	Feb '16	Bow Street
Alfredo's on the Square	Restaurant	Feb '16	Lisburn Square
The Man Shack	Salon	Mar '16	Lisburn Square
Pizza Base	Restaurant	Mar '16	Castle Street
Rose and Poetry	Fashion	Mar '16	Railway Street
Brazink	Tattoo & Piercing	Apr '16	Bachelors Walk
Blush Studio 18	Beautician	Apr '16	Castle Street
Shane Bennett	Salon	Apr '16	Lisburn Square
Eden Beauty	Beautician	May '16	Bachelors Walk
Lisburn Council	Council	May '16	Bridge Street
The Money Shop	Financial	May '16	Market Place
Emma Johnston Interiors	Interiors	May '16	Lisburn Square
Quicklet	Estate Agents	Jun '16	Bachelors Walk

July – Dec 2016

Entrant	Use	Month	Location
Peacocks	Fashion	Oct '16	Bow Street Mall
Linhol Hair	Salon	Oct '16	Antrim Street
Clan Beauty	Beautician	Oct '16	Castle Street
White Linen	Fashion	Oct '16	Railway Street
Active Lifestyle and Fitness	Gym	Oct '16	Antrim Street
Glasshouse Coffee	Restaurant	Oct '16	Lisburn Square
DV8	Fashion	Nov '16	Bow Street Mall
Key's Homecare	Hardware	Nov '16	Bow Street
Glam Nails & Beauty	Beautician	Nov '16	Bridge Street
Papazazzi	Fashion	Nov '16	Bridge Street
Penny Square Market	Market	Nov '16	Haslem's Lane
Shauna McAuley Hair	Salon	Dec '16	Castle Street

Jan – Jun 2017

Entrant	*Use*	*Month*	*Location*
Jonzara	Fashion	Jan '17	Bow Street
Rosie's Emporium	Giftware	Jan '17	Haslems Lane
Eclipse Nurseries	Nursery	Mar '17	Lisburn Square
Soho	Fashion	Apr '17	Bow Street Mall
Sharps Barber	Salon	May '17	Bow Street
Apache Pizza	Restaurant	May '17	Bachelors Walk
La Belle Boutique	Beautician	May '17	Antrim Street
RSVP by Rose and Poetry	Fashion	Jun '17	Railway Street
Greggs	Restaurant	Jun '17	Market Place
Little Wing	Restaurant	Jun '17	Lisburn Square
Pure Gym	Gym	Jun '17	Laganbank Retail Park
TK Maxx	Fashion	Jun '17	Laganbank Retail Park

July – Dec 2017

Entrant	*Use*	*Month*	*Location*
Advanced Non-Surgical Solutions	Cryotherapy	September 2017	Lisburn Square
The Kidz Shack	Barber	October 2017	Lisburn Square
Beauty Boulevard	Beauticians	October 2017	Lisburn Square
Ground Espresso Bar	Coffee Shop	October 2017	Laganbank Retail Park

Appendix 3

Departures of retailers from Lisburn City Centre (CBRE)

Jan – Dec 2015				
Exiting Occupant	**Use**	**Location**	**New Location**	**Reasoning**
Mothercare	Children's Wear & Nursery goods	Bow Street	Sprucefield	Store reformatting to Retail Warehouse
Jan-Dec 2016				
Exiting Occupant	**Use**	**Location**	**New Location**	**Reasoning**
BHS	Fashion and Homeware	Bow Street Mall	N/A	Company dissolved
Exhibit	Fashion	Bow Street Mall	N/A	Company dissolved
Jan – Dec 2017				
Exiting Occupant	**Use**	**Location**	**New Location**	**Reasoning**
Boots	Chemist	Bow Street	N/A	Consolidated to one store in Lisburn and one at Sprucefield
Argos	Catalogue Retailer	Lisburn Square	N/A	Trade from Sprucefield. Country wide consolidation
World of Furniture	Bulky furniture	Bow Street Mall	N/A	Company Dissolved
Alfredo's	Restaurant	Lisburn Square	N/A	Company dissolved

Appendix 4

List of individual land uses within the small towns

Ove Arup Survey 2017

Code	Activity- colour code on maps
1	Convenience retailing
2	Comparison retailing
3	Restaurants/ cafes/pubs/take-aways
4	Other non-retail services
5	Financial services
6	Property/ offices/professional services
7	Leisure, gaming/halls, libraries etc
8	Public services/ miscellaneous
9	Vacant unit

CARRYDUFF

Category	Name of Business	Address
1	SPAR Carryduff	14b Ballynahinch Rd, Carryduff, Belfast BT8 8DN
1	Wineseller	20 Ballynahinch Rd, Carryduff, Belfast BT8
2	Winemark	13, Carryduff Shopping Centre, Carryduff BT8 8DN
2	Painter choice	Carryduff Shopping Centre
2	The bookShop	Carryduff Shopping Centre
2	McCall Tiles Carryduff	14A Ballynahinch Rd, Carryduff, Belfast BT8 8DN
2	Carryduff Hardware	14 Ballynahinch Rd, Carryduff, Belfast BT8 8DN
2	Berlin Clothing - Ladies' Clothes Shop	31 Ballynahinch Rd, Carryduff, Belfast BT8 8EH
2	Steward Intruder Alarms	Lowes Industrial Estate, 31 Ballynahinch Rd, Carryduff, Belfast BT8 8EH
2	Interiors & Floor Design	Unit 7 Agar House, 31 Ballynahinch Rd, Carryduff, Belfast BT8 8EH
2	BPJ	Lowes Industrial Estate, 31 Ballynahinch Rd, Carryduff, Belfast BT8 8EH
3	John Dory's Ltd	Carryduff, Belfast BT8 8RB
3	The blackman bistro	The Carryduff Centre, Church Rd, Carryduff, Belfast BT8 8RB
3	The Jolly Fryer- Fish and Chips Takeaway	25 Church Rd, Carryduff, Belfast BT8 8DT
3	Eight South -Bar & Grill	16-20 Ballynahinch Rd, Carryduff, Belfast BT8 8DN
4	Factor 1	Carryduff Shopping Centre Ballynahinch Road, Carryduff, Belfast BT8 8DN
4	Smart Wash-in	23 Church Rd, Carryduff, Belfast BT8 8DT
4	Factor 1 Day spar	Lowes Industrial Estate, 31 Ballynahinch Rd, Carryduff, Belfast BT8 8EH
4	Opticains	31 Ballynahinch Rd, Carryduff, Belfast BT8 8EH
5	McGuire + Farry -Accountant	Emerson House, 14B Ballynahinch Rd, Carryduff, Belfast BT8 8DN
5	David Lyttle & Co - Accountant	33 Ballynahinch Rd, Carryduff, Belfast BT8 8EH
5	S & S Mortgage Solutions	14 Ballynahinch Rd, Carryduff, Belfast BT8 8DN
6	Murland J & Co	33 Church Ave, Carryduff, Belfast BT8 8DT
6	Alan Newell Estate Agents & Valuers	14B Ballynahinch Rd, Carryduff, Belfast BT8 8DN
7	Carryduff Library	Church Rd, Carryduff BT8 8DT
7	Carryduff Play Care Centre	20A Church Rd, Carryduff, Belfast BT8 8DT
7	Ladbrokes Plc Off Track Betting Shop	Unit 20, The Carryduff Centre, Carryduff, Belfast BT8 8RB
8	A2B Storage & Distribution - Courier service	6 Lowes Industrial Estate, 31 Ballynahinch Rd, Carryduff, Belfast BT8 8EH
8	Hanna Mechanical Services	Emerson House, 14b Ballynahinch Road, Carryduff, Belfast BT8 8DN
8	Hollygate Veterinary Clinic	21 Church Rd, Carryduff, Belfast BT8 8DT
8	Church Road Dental Care	29 Church Rd, Carryduff, Belfast BT8 8DT
8	Chiropractor	Emerson House, Ballynahinch Road, Carryduff, Belfast BT8 8DN
8	Killynure House	Church Rd Carryduff Belfast BT8 8DT
8	Carryduff Presbyterian Church	Church Rd, Carryduff, Belfast BT8 8DT
8	Carryduff Pharmacy	6 Hillsborough Rd, Carryduff, Belfast BT8 8HR
8	Hospital	6 Hillsborough Rd, Carryduff, Belfast BT8 8HR
9	Vacant Unit	
9	Vacant Unit	
9	Vacant Unit	

Total units 39

	DUNDONALD	
1	Asda	1009 Upper Newtownards Rd
1	EuroSpar	756 Upper Newtownards Rd, Dundonald, Belfast BT16 1LA
1	Winemark	Unit 6, 756 Upper Newtownards Rd, Belfast BT16 0LA
2	B&M Bargains Store	2 Dunlady Rd, Dundonald, Belfast BT16 1TT
2	Annie's Orphans	Belfast BT16 1RL
2	dtb wall paper and part Specilaist	756 Upper Newtownards Rd, Dundonald, Belfast BT16 1LA
2	Creative Bathrooms	975 Upper Newtownards Road, Dundonald BT16 1RN
2	Medicare Pharmacy	967 Upper Newtownards Road, Belfast BT16 1RL
2	electricsmoke	Upper Newtownards Rd, Belfast BT16 1RJ
2	Baby Luxe	740 Upper Newtownards Rd, Dundonald, Belfast BT16 1RJ
2	Classic Blinds	744 Upper Newtownards Rd, Dundonald, Belfast BT16 1RJ
2	Vape Hunter Dundonald- Vaporiser Shop	748 Upper Newtownards Rd, Dundonald, Belfast BT16 1RJ
2	Ziggicig Vaporiser Shop	Unit 7, Cherryhill Shopping Centre, Upper Newtownards Rd, Dundonald, Belfast
2	Alterations	5 Curch Road Dundonald, Belfast BT16 2LN
3	Amethyst	A20, Belfast BT16 1RL
3	Pizzaman	Belfast BT16 1RJ
3	Far East Chinese Takeaway	Upper Newtownards Road, Dundonald BT16 1RN
3	Jemos Kebabs & Pizza	993 Upper Newtownards Rd, Dundonald, Belfast BT16 1RN
3	Papa Johns Pizza	756 Upper Newtownards Rd, Dundonald, Belfast BT16 1LA
3	Supermac's Family Restaurant	756 Upper Newtownards Rd, Dundonald, Belfast BT16 1LA
3	John Dory's	Upper Newtownards Rd, Dundonald, Belfast BT16 1LA
3	Subway	Spar C-Store, Maxol Gas Station, Dundonald, Belfast BT16 1LA
4	B Pure Bauty Saloon	2 Church Road, Belfast BT16 2LN
4	Elain	7 Church Road, Belfast BT16 2LN
4	Turkish Barber	3 Church Road, Belfast BT16 2LN
4	Blow drybar saloon	967 Upper Newtownards Rd, Dundonald, Belfast BT16 1RN
4	La Veau Hair	U4, 734 Upper Newtownards Road, Dundonald, Belfast BT16 1RJ
4	Men's room Barshop and tanning	746 Upper Newtownards Rd, Dundonald, Belfast BT16 1RJ
4	Hair Network-Hairdresser	1007 Upper Newtownards Rd, Dundonald, Belfast BT16 1RN
4	Rob's Barber shop	1007 Upper Newtownards Rd, Dundonald, Belfast BT16 1RN
4	Just Paris Hairdresser	756 Upper Newtownards Rd, Dundonald, Belfast BT16 1LA
4	Sam Bird Opticians	732 Upper Newtownards Rd, Dundonald, Belfast BT16 1RJ
4	Sun seekers	Unit1, 734 Upper Newtownards Road, Belfast BT16 1RJ
4	Doggy Style Dog Grooming Salon	Dundonald, Belfast BT16 1RJ
4	Sightcare Opticians	2, 756 Upper Newtownards Rd, Dundonald, Belfast BT16 1LA
5	Dundonald Credit Union	748 Upper Newtownards Rd, Dundonald, Belfast BT16 1RJ
6	Vision Property Agents	977 Upper Newtownards Rd, Belfast BT16 1RL
6	Solicitor	734 Upper Newtownards Rd, Dundonald, Belfast BT16 1RJ
7	A McLean betting	997 Upper Newtownards Rd, Dundonald, Belfast BT16 1RN
7	Church on the green	Church Green, Dundonald, BT16 2LP
7	Library	16 Church Road, Belfast BT16 2LN
8	Oasis Dental Care	Unit 3-3A Moat House, Belfast BT16 1RL
8	Smart Dental Care	1003 Upper Newtownards Rd, Dundonald, Belfast BT16 1RN
8	Medical Centre	16 Church Rd, Dundonald, Belfast BT16 2LN
8	Manna (Food Bank)	971 Upper Newtownards Rd, Castlereagh, Belfast BT16 1RL
9	Vacant Unit	Upper Newtownards Rd
9	Vacant Unit	

Total units 47

	HILLSBOROUGH	
1	Winemark	5 Dromore Rd, The Square, Hillsborough BT26 6AG
1	Spar	7 Ballynahinch St, Hillsborough BT26 6AW
1	E.R. Wilson	1 Main St, Hillsborough BT26 6AE
1	Fosters	6 Lisburn St, Hillsborough BT26 6AB
1	Co-op	8 Lisburn St, Hillsborough BT26 6AB
1	Adairs Bakery	5 Lisburn St, Hillsborough BT26 6AB
1	R Walker & Son	25 Main St, Hillsborough BT26 6AE
2	The Pharmacy V.E.Reaney	12 Lisburn St, Hillsborough BT26 6AB
2	Christoff	7 The Square, Hillsborough BT26 6AG
2	Cheshire Cat	32 Main St, Hillsborough BT26 6AE
2	Julie Elliott	10 Main St, Hillsborough BT26 6AE
2	Candy Plum	4 Main St, Hillsborough BT26 6AE
2	Patterson's Pharmacy	11 Ballynahinch St, Hillsborough BT26 6AW
2	Peany Bridal	10 Ballynahinch St, Hillsborough BT26 6AW
2	Twigs & Twine	2A Lisburn St, Hillsborough BT26 6AB
2	Petticoat Lane	1-3 Lisburn St, Hillsborough, Lisburn BT26 6AB
3	Café Deelite	5C The Square, Hillsborough BT26 6AG
3	The Plough Inn	3 The Square, Hillsborough BT26 6AG
3	Vintage Rooms	3 The Square, Hillsborough BT26 6AG
3	Humble Pie	20A Main St, Hillsborough BT26 6AE
3	Café Azora	19 Ballynahinch St, Hillsborough BT26 6AW
3	Owl & Pussycat café	Orchard Mews, Ballynahinch Rd, Hillsborough BT26 6GR
3	Royal China	4 Ballynahinch St, Hillsborough BT26 6AW
3	Pizza Boutique	6D Lisburn St, Hillsborough BT26 6AB
3	Meat & Thyme	16 Lisburn St, Hillsborough BT26 6AB
3	PG Chips	20 Lisburn St, Hillsborough BT26 6AB
3	The Parson's Nose	48 Lisburn St, Hillsborough BT26 6AB
3	Out of Habit	21 Lisburn St, Hillsborough BT26 6AB
3	The Hillside	21 Main St, Hillsborough BT26 2AE
4	Oonagh Boman Makeup and Beauty	16 Main Street, Hillsborough BT26 6AE
4	Gatsby & Beau	16 Main St, Hillsborough BT26 6AE
4	Hair @A10	10 Main St, Hillsborough BT26 6AE
4	Royal Beauty	14a Ballynahinch St, Hillsborough BT26 6AW
4	The Laundy Room	3 Main St, Hillsborough BT26 6AE
4	M.D. Village Barber Shop	2A Lisburn St, Hillsborough BT26 6AB
4	U-nique Hair Salon	6B Lisburn Street, County Antrim, Hillsborough BT26 6AB
4	Audrey Robinson Nails	36 Lisburn St, Hillsborough BT26 6AB
5	Ardtalla Wealth Management	10 Main St, Hillsborough BT26 6AE
5	Danske Bank	20 Ballynahinch St, Hillsborough BT26 6AW
5	ASC Wylie Chartered Accountant	7 Lisburn St, Hillsborough BT26
6	Thompson Mitchell Solicitors	9 The Square, Hillsborough BT26 6AG
6	Neal Lucas Recruitment	1 The Square, Hillsborough BT26 6AG
6	SM Events	Main St, Hillsborough BT26 6AE
6	Tascomi	3 Ballynahinch St, Hillsborough BT26 6AW
6	C. Rooney	5 Ballynahinch St, Hillsborough BT26 6AW
6	Robert Wilson	Ballynahinch Rd, Hillsborough BT26 6AW
6	Shaw & Company Solicitors	13 Lisburn St, Hillsborough BT26 6AB
7	Hillsborough Scout and Community Hall	2 Ballynahinch Rd, Hillsborough BT26 6AR
7	Orange Hall	Ballynahinch Rd, Hillsborough BT26 6AW
7	Masonic Hall	Lisburn St, Hillsborough BT26 6AB
8	Hillsborough Private Clinic	2 Main St, Hillsborough BT26 6AE
8	Hillsborough Parish	Sextons House, Main Street, Hillsborough BT26 6AE
8	Medical Practice	29 Ballynahinch St, Hillsborough BT26 6AW
8	Alliance Medical	2 Ballynahinch Rd, Hillsborough BT26 6AR
8	Orthoderm Clinic	2 Ballynahinch Rd, Hillsborough BT26 6AR
8	Downshire Primary School	7 Ballynahinch Rd, Hillsborough BT26 6AR
8	Post Office	8 Ballynahinch St, Hillsborough BT26 6AW
8	Hillsborough Dental	22 Lisburn St, Hillsborough BT26 6AB
8	Hillsborough Presbyterian Church	2 Lisburn Road, Hillsborough BT26 6AA
9	Vacant	10 Lisburn St, Hillsborough BT26 6AB

Total units 60

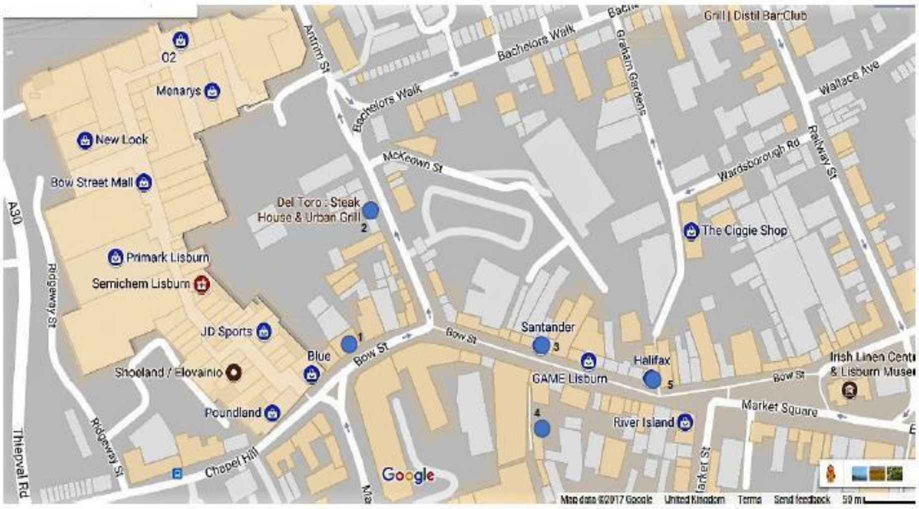
MOIRA

1	Centra	16 Main St, Moira, Craigavon BT67 0LE
1	The Barrow- Greengrocer	54 Main St, Moira, Craigavon BT67 0LQ
1	McCartneys of Moira - Butchers	56 Main St, Moira, Craigavon BT67 0LQ
1	Moira Bakery	92 Main St, Moira, Craigavon BT67 0LH
1	The Meat Centre	65 Main St, Moira, Craigavon BT67 0TW
1	Super Valu	21-23 Main St, Moira, Craigavon BT67 0LE
1	Winemark	Units 4a-4b, The Village Centre,, Main St, Moira, Craigavon BT67 0LE
2	Barnardo's Moira	1, Village Centre, Main St, Moira, Craigavon BT67 0LE
2	Gap Charity Shop	Eden House, Main St, Moira, Craigavon BT67 0LQ
2	Forever Flowers	54 Main St, Moira, Craigavon BT67 0LQ
2	Country Blos soms & Home Interiors	68 Main St, Moira, Craigavon BT67 0LQ
2	Enigm a - Ladies' Clothes Shop	72 Main St, Moira, Craigavon BT67 0LQ
2	Sim ply Pink - clothing	Deram ore House/ Main St, Craigavon BT67 0LQ
2	Ciani Childrens Wear	82 Main St, Moira, Craigavon BT67 0LH
2	Willow - Gift Shop	84 Main St, Moira, Craigavon BT67 0LH
2	Four Winds Antiques	96 Main Street, Moira, Craigavon BT67 0LH
2	Equus - Ladies' Clothes Shop	Main St, Moira, Craigavon BT67 0LH
2	Jacks ons of Moira - Departm ent Store	100 Main St, Moira, Craigavon BT67 0LH
2	Beaufort Interiors	104-106 Main St, Moira, Craigavon BT67 0LH
2	Another Chance - Clothing Shop	85 Main St, Moira, Craigavon BT67 0LH
2	LilyRose Boutique	Meeting Street, Moira BT67 0NR
2	Place of Grace	35 Main St, Moira, Craigavon BT67 0LQ
2	Made and Measured - Clothing alteration ser	94 Main St, Moira, Craigavon BT67 0LQ
2	Boots	45 Main St, Moira, Craigavon BT67 0LQ
3	PG Chips	2, The Village Centre, 14-16 Main St, Moira, Craigavon BT67 0LE
3	Cairo's Coffee	1A Backwood Rd, Moira, Craigavon BT67 0LQ
3	Masala Hut	36 Main St, Moira, Craigavon BT67 0LQ
3	kris hna Indian spice	40 Main St, Moira, Craigavon BT67 0LQ
3	The Fine Coffee Co.	70 Main St, Moira, Craigavon BT67 0LQ
3	Pretty Mary's	86 Main St, Moira, Craigavon BT67 0LH
3	Midnight Haunt	90 Main St, Moira, Craigavon BT67 0LH
3	Pim ento Coffee Shop	101 Main St, Moira, Craigavon BT67 0LH
3	Mama's Pizzeria	95 Main St, Moira, Craigavon BT67 0BJ
3	Herrons Country Fried Chicken	87 Main St, Moira, Craigavon BT67 0LH
3	The Quirky Bird	4 Meeting St, Moira, Craigavon BT67 0NR
3	Graham s Fish & Chips	67, Main St, Moira, Craigavon BT67 0LQ
3	Fourtrees Bar	61 Main St, Moira, Craigavon BT67 0LQ
3	Wine and Brine	59 Main St, Moira, Craigavon BT67 0LQ
3	The Fat Gherkin	57 Main St, Moira, Craigavon BT67 0TL
3	Higher Grounds	35 Main St, Moira, Craigavon BT67 0LQ
4	Karan Francis Health & Beauty CLinic	16 Main St, Moira, Craigavon BT67 0LE
4	Es capades -Hairdres ser	Main Street, Moira, Craigavon BT67 0LE
4	Blue Sky cleaner	3, The Village Centre, 9 Main St, Moira, Craigavon BT67 0LH
4	Tommy French Bookmakers	78 Main St, Moira, Craigavon BT67 0LH
4	Main Street Barber Shop	88 Main St, Moira, Craigavon BT67 0LH
4	International Hair & Beauty Salon	93 Main St, Moira, Craigavon BT67 0LH
4	Halo Hair dresser	83 Main St, Moira, Craigavon BT67 0LH
4	Bleu Hair Company	Meeting Street, Moira, Craigavon BT67 0NR
4	Pres swell - Dry cleaner	55 Main St, Moira, Craigavon BT67 0LQ
4	Barber shop	55 Main St, Moira, Craigavon BT67 0LQ
4	Julie Robinson Opticians	75 Main St, Moira, Craigavon BT67 0LH
5	Abbey Insurance Brokers Ltd	9, The Village Centre, Main St, Moira, Craigavon BT67 0LE
5	Independent Healthcare Solutions	40 Main St, Moira, Craigavon BT67 0LQ
5	K M C Wealth Management	85 Main St, Moira, Craigavon BT67 0LH
5	Ulster Bank	76 Main Street, Craigavon, Moira, Co Arm agh BT67 0LQ
5	Firs t For Finance	87 Main St, Moira, Craigavon BT67 0LH
6	Solicitors	The Village Centre, 16 Main St, Moira, Craigavon BT67 0LE
6	Stewart Estate Agents	34 Main St, Moira, Craigavon BT67 0LE
6	Dandel on studio	68 Main St, Moira, Craigavon BT67 0LQ
6	Lavery Deidre - Lawyer	Deram ore House/76 Main St, Craigavon BT67 0LQ
6	Robert Wilson Group - Es tate Agent	80 Main St, Moira, Craigavon BT67 0LQ
6	Longstone Property Sales	88 Main St, Moira, Craigavon BT67 0LH
6	Bill McCann Es tate Agency	83 Main St, Moira, Craigavon BT67 0LH
6	John Diven & Co	Main St, Moira BT67 0LJ
6	Watson & Neill Solicitors and Notary Public, M	43 Main St, Moira, Craigavon BT67 0LQ
6	Chartered Architects	39 Main St, Moira, Craigavon BT67 0LQ
7	Sim ply G Bes t Fitness	89 Main St, Moira, Craigavon BT67 0LH
7	St John's Paris h Centre	38 Main St, Moira, Craigavon BT67 0LE
8	Moira Guest House	65 Main St, Moira, Craigavon BT67 0LQ
8	Village Taxis	55 Main St, Moira, Craigavon BT67 0LQ
8	Moira methodist Church	Main St, Moira, Craigavon BT67 0LE
8	Paris h	Main St, Moira, Craigavon BT67 0LH
8	Moira Pentecos tal Church	73 Main St, Moira, Craigavon BT67 0LH
8	Maxol Garage	15 Main St, Moira, Craigavon BT67 0LE
8	Moira Cosmetic Dental	81 Main St, Moira, Craigavon BT67 0LH
8	Moira Dental Care	77 Main St, Moira, Craigavon BT67 0LH
8	Moira Phys iotherapy and Sports Injury Clinic	3 Meeting St, Moira, Craigavon BT67 0TW
8	Moira Foot Clinic	5 Meeting St, Moira, Craigavon BT67 0LE
8	21st Century Back Care	63 Main St, Moira, Craigavon BT67 0LQ
8	Veternary surgery	41 Main St, Moira, Craigavon BT67 0LQ
8	House /site	Main St, Moira, Craigavon BT67 0LQ
8	Moira Post Office	Main St, Moira, Craigavon BT67 0LE
8	Blacks tone Clinic	21 Main St, Moira, Craigavon BT67 0LH
9	Vacant Unit	
9	Vacant Unit	

Total units 85

Appendix 5

NEMS Pedestrian flow count points- Lisburn City Centre



Lisburn City Centre- Map 1 (of 2): location of pedestrian count points, November 2017

Lisburn City Centre- Map 2 (of 2): location of pedestrian count points, November 2017