Causeway Coast & Glens Borough Council

| Retail and Leisure Capacity Study and Perception Studies | 20th December 2017 |
|---|---|
| **PLANNING COMMITTEE** | |

| **Linkage to Council Strategy (2015-19)** | |
|---|---|
| **Strategic Theme** | **Outcome** |
| Leader and Champion | • Our Elected Members will provide civic leadership to our citizens working to promote the Borough as an attractive place to live, work, invest and visit.<br>• We will establish key relationships with Government agencies and potential strategic partners in NI and external to it which helps us to deliver our vision for the Council area. |
| Accelerating our economy and contributing to prosperity | • The Council will work with its partners to maximise business start-up opportunities and encourage existing enterprises to grow and prosper.<br>• The Council will work with partners to maximise investment funding opportunities from external sources including the NI Assembly, the EU, the Rural Development Programme and from private sector funding. |
| Protect the environment in which we live | • All environments in the area will benefit from pro-active decision making which protects the natural features, characteristics and integrity of the Borough. |
| **Lead Officer** | Principal Planning Officer |
| **Cost:** (If applicable) | N/A |

## For Decision

### 1.0 Background

1.1 Under the provisions of the Strategic Planning Policy Statement (SPPS) and in preparation of its Local Development Plan (LDP), Councils are required to undertake an assessment of the need or capacity for retail and other main town centre uses across the plan area, and to prepare town centre health checks, which are to be reviewed at least once every five years. As Members are also aware, there have been a number of large retail proposals in the Borough's main towns in recent years, and there has been no up to date evidence relating to retail capacity on which to assess these against.

1.2 Retail capacity work and some aspects of health check work are specialisms within planning, and, therefore, in recognition of the requirement to undertake this work as part of the LDP process, and of the need in relation to the determination of planning applications for retail development, the Council appointed two separate consultants in November 2016 to prepare two separate but related retail pieces of work:

- Nexus Planning - Retail and Leisure Capacity Study; and
- Sproule Consulting - Public and Business Perception Studies.

1.3 Members will note that representatives from both Nexus Planning and Sproule Consulting presented their draft findings to the LDP Members' Workshop held on 17th May 2017.

1.4 Members will also be aware that the Final Retail and Leisure Capacity Report and Perception Studies were presented to the 22nd November 2017 Planning Committee, where they were deferred to allow Members additional time to read through the papers.

## 2.0 Detail

2.1 The Council's Planning Department liaised with the Place and Prosperity Section in commissioning and managing this work. The following six towns were the subject of the survey:

Coleraine Limavady Ballymoney Ballycastle Portrush Portstewart

2.2 The first four towns relate to the hubs identified in the Regional Development Strategy (RDS) 2035. Portrush and Portstewart were included due to their association with the British and Irish Open golf championships.

### Retail and Leisure Capacity Study

2.3 The Retail & Leisure Capacity Study was undertaken by Nexus Planning, and an Executive Summary of its report is attached at Appendix 1. As well as examining retail capacity, the report considered the sectors of the leisure market (largely private sector provision) also. The study involved 700 telephone-based interviews across a Study Area (see map on page 4 of the Executive Summary), and considered the following issues:

- current and future retail trends;
- identification of the current range of retail facilities in the Borough's six towns, with comparison to Enniskillen and Omagh (where Nexus had recently also undertaken similar survey work);
- identified shopping patterns in the Study Area;
- an assessment of expenditure levels and population growth in the Study Area;
- an analysis of future retail floorspace needs over the plan period;

- an analysis of existing leisure provision and future needs over the plan period; and

- recommendations for the Local Development Plan's retail, town centre and leisure strategy.

2.4 The report covered the period until 2030, to tie in the with LDP timetable, although it is recognised that, in retail terms, this timeframe requires regular review. The main findings of the Retail and Leisure Capacity Study are:

**Future Retail Capacity**

**Convenience**: Everyday essential items. Defined as food, tobacco, beer, wine, spirits, newspapers and magazines, and household cleaning materials

**Table 1:** Convenience Goods Floorspace Capacity

| Year | Residual Expenditure (£) | Floorspace Capacity (sq. m net) | |
|---|---|---|---|
| | | Min | Max |
| 2016 | 98.0 | 7,700 | 9,700 |
| 2020 | 98.3 | 7,8000 | 9,800 |
| 2025 | 100.2 | 7,900 | 10,000 |
| 2030 | 100.6 | 7,900 | 10,000 |

**Comparison**: Retail items not bought on a frequent basis, for example televisions and white goods (fridges, dishwashers etc.)

**Table 2:** Comparison Goods Floorspace Capacity

| Year | Residual Expenditure (£) | Floorspace Capacity (sq. m net) | |
|---|---|---|---|
| | | Min | Max |
| 2016 | -10.2 | -1,900 | -2,900 |
| 2020 | -10.7 | -1,800 | -2,800 |
| 2025 | 2.8 | 400 | 700 |
| 2030 | 23.5 | 3,200 | 5,000 |

## Future Leisure Capacity

2.5 The Study found that the Borough was largely self-sufficient in most aspects of leisure provision. However, in qualitative terms, the Study recommends the Council should:

- welcome qualitative improvements in the stock of health and fitness clubs across the Borough;
- consider the possible addition of a swimming pool in Ballycastle to account for expressed demand;
- seek improvements to the quantitative and qualitative provision of hotels in Zone 4 (The Glens); and
- possible additional children's facilities across the Borough.

## Public and Business Perception Studies

2.6 These studies were undertaken by Sproule Consulting. Table 3 details the numbers of surveys undertaken in each of the six towns.

*Table 3: Completed Surveys*

| | On-Street (General Public) | Business |
|---|---|---|
| ***Coleraine*** | 100 | 100 |
| ***Ballymoney*** | 100 | 90 |
| ***Portrush*** | 100 | 40 |
| ***Portstewart*** | 100 | 40 |
| ***Limavady*** | 100 | 78 |
| ***Ballycastle*** | 100 | 54 |
| ***TOTAL*** | 600 | 402 |

2.7 This survey work relates to town centre health checks that are required by the SPPS to form part of the evidence base for the LDP. The survey work examined attitudes and perceptions towards the individual town centres by both the general public and by businesses operating in the town centre.

2.8 Other aspects of town centre health checks include:

- Existing town centre uses, including resident population;
- Vacancy rates;
- Footfall; and
- Retailer representation.

2.8 Table 4 below shows the vacancy levels (in terms of both units and floorspace) in the six towns.

**Table 4:** Vacancy levels in the six towns

| **Vacancy levels - compared to the UK Average** | | | | |
|---|---|---|---|---|
| **Coleraine** (units) | Lower % convenience | Higher % comparison | Lower % retail services | Higher % vacancy |
| **Coleraine** (floorspace) | Lower % convenience | Higher % comparison | Lower % retail services | Higher % vacancy |
| | | | | |
| **Limavady** (units) | Lower % convenience | Higher % comparison | Lower % retail services | Higher % vacancy |
| **Limavady** (floorspace) | Higher % convenience | Higher % comparison | Lower % retail services | Lower % vacancy |
| | | | | |
| **Ballymoney** (units) | Lower % convenience | Lower % comparison | Lower % retail services | Higher % vacancy |
| **Ballymoney** (floorspace) | Higher % convenience | Lower % comparison | Lower % retail services | Higher % vacancy |
| | | | | |
| **Ballycastle** (units) | Lower % convenience | Lower % comparison | Lower % retail services | Higher % vacancy |
| **Ballycastle** (floorspace) | Higher % convenience | Lower % comparison | Lower % retail services | Higher % vacancy |
| | | | | |
| **Portrush** (units) | Higher % convenience | Higher % comparison | Lower % retail services | Lower % vacancy |
| **Portrush** (floorspace) | Lower % convenience | Higher % comparison | Higher % retail services | Lower % vacancy |
| | | | | |
| **Portstewart** (units) | Higher % convenience | Higher % comparison | Lower % retail services | same |
| **Portstewart** (floorspace) | Lower % convenience | Higher % comparison | Lower % retail services | Higher % vacancy |

2.9 The general public surveys sought information on matters such as if respondents were residents or visitors to the town centre; how they had travelled to the centre; how much money they intended to spend; their overall perception of the town centre; and areas for improvement (see summary of survey results at Table No’s 5-10, over).

**Table 5:** Positive Town Centre Aspects

| Town | B'Castle | B'Money | C'Raine | L'Vady | P'Rush | P'Stewart |
|---|---|---|---|---|---|---|
| Friendliness | 94 | 86 | 76 | 91 | 88 | 89 |
| Atmosphere | 88 | 76 | | 82 | 75 | 87 |
| Cafes | 82 | 79 | 76 | 85 | 85 | |
| Value for money | 76 | | | | | |
| Lighting | | 72 | 73 | | | 79 |
| Flowers | | | 81 | | | |
| Pedestrian Area | | | | 78 | 65 | 76 |
| Safety | | | | | | 84 |
| Quality of shops | | | | | | 78 |

**Table 6:** Average Town Centre Aspects

| Town | B'Castle | B'Money | C'Raine | L'Vady | P'Rush | P'Stewart |
|---|---|---|---|---|---|---|
| Parking | 32 | 30 | | | | |
| On-street entertain-ment | 30 | | | | | 33 |
| Vandalism, anti-social behaviour | 28 | 38 | 28/31 | | 45 | |
| Ease of movement | 24 | | | | | |
| Vacant shops | 24 | | 25 | 27 | | |
| Children's play areas | | 33 | | 26 | | |
| Condition of streets | | 29 | 26 | | | |
| Lighting | | | | | 40 | |
| Range of goods & services | | | 30 | | | 30 |
| Dereliction | | | | 30 | | |
| Building condition | | | | | 38 | 30 |
| Value for money | | | | | 35 | |

**Table 7:** Poor Town Centre Aspects

| Town | B'Castle | B'Money | C'Raine | L'Vady | P'Rush | P'Stewart |
|---|---|---|---|---|---|---|
| Vacant shops | 43 | 81 | 67 | | | 56 |
| On-street entertain-ment | 42 | | 59 | 45 | | |
| Ease of movement | 35 | | | | | |
| Variety of shops | | 68 | 64 | | | 48 |
| Building condition | | 51 | | | | |
| Car parking price | | | 71 | 48 | | |
| Parking | | | | | 65 | 52 |
| No. of parking spaces | | | | | 60 | 50 |
| Play areas | | | 60 | | 58 | |
| Anti-social behaviour | | | | 60 | | |
| Dereliction | 35 | 85 | | 35 | 63 | |

**Table 8:** Town Centre Priorities – First

| Town | B'Castle | B'Money | C'Raine | L'Vady | P'Rush | P'Stewart |
|---|---|---|---|---|---|---|
| Wider variety of shops | 13 | 28 | 29 | 18 | | |
| More recreation facilities | 13 | | | | | |
| Better parking - cost | 11 | | 16 | 19 | | |
| Better parking –no of spaces | 9 | 4 | 12 | | 25 | 25 |
| More public toilets | 9 | | | | 8 | |
| More shops | | 17 | 16 | 8 | | 8 |
| Better quality shops | | 6 | | | 10 | |
| Better maintained buildings | | | | 8 | 20 | |
| More for children, teenagers | | | | | | 13 |

**Table 9:** Town Centre Priorities – Second

| Town | B'Castle | B'Money | C'Raine | L'Vady | P'Rush | P'Stewart |
|---|---|---|---|---|---|---|
| Wider variety of shops | | | | | | |
| More recreation facilities | 13 | | | | | |
| Better parking - cost | | | | | | |
| Better parking – no of spaces | 11 | | | | | |
| More public toilets | | | | | | |
| More shops | 9 | | | | | |
| More for children teenagers | 7 | | | | | |

**Table 10:** Town Centre Priorities – Third

| Town | B'Castle | B'Money | C'Raine | L'Vady | P'Rush | P'Stewart |
|---|---|---|---|---|---|---|
| Wider variety of shops | 13 | | | | | |
| More recreation facilities | 13 | | | | | |
| Better parking - cost | 11 | | | | | |
| Better parking –no of spaces | 9 | | | | | |
| More public toilets | 9 | | | | | |
| More shops | | | | | | |

2.10 The business surveys sought information on the main activity of the business; how long businesses had traded for; the type of business ownership; investments in the business; numbers employed; which aspects of the town centre businesses felt were good; and areas for improvement.

2.11 In terms of the perception of the six towns, the main findings from the general public and business surveys are:

| Coleraine Perceptions | | |
|---|---|---|
| | Public | Business |
| Very Good/Good | 61% | 7% |
| Very Poor/Poor | 16% | 58% |

| Limavady Perceptions | | |
|---|---|---|
| | Public | Business |
| Very Good/Good | 64% | 37% |
| Very Poor/Poor | 11% | 26% |

| Ballymoney Perceptions | | |
|---|---|---|
| | Public | Business |
| Very Good/Good | 35% | 13% |
| Very Poor/Poor | 29% | 54% |

| Ballycastle Perceptions | | |
|---|---|---|
| | Public | Business |
| Very Good/Good | 41% | 48% |
| Very Poor/Poor | 5% | 14% |

| Portrush Perceptions | | |
|---|---|---|
| | Public | Business |
| Very Good/Good | 43% | 5% |
| Very Poor/Poor | 32% | 51% |

| Portstewart Perceptions | | |
|---|---|---|
| | Public | Business |
| Very Good/Good | 83% | 40% |
| Very Poor/Poor | 3% | 15% |

2.12 The Business Survey undertaken by Sproule Consulting also identified the following business turnover information for the last business year:

**Table 11**: Business Turnover (last business year)

| | **Turnover %** | | |
|---|---|---|---|
| **Town** | **Normal** | **Below Average** | **Well Below Average** |
| Coleraine | 49 | 14 | 8 |
| Limavady | 58 | 19 | 3 |
| Ballymoney | 54 | 21 | 6 |
| Ballycastle | 57 | 24 | 4 |
| Portrush | 58 | 15 | 5 |
| Portstewart | 58 | 23 | 5 |

2.13 These results support the Strategic Planning Policy Statement (SPPS) in its ‘town centre first’ approach.

## 3.0 Recommendation

3.1 **IT IS RECOMMENDED** that Members accept the Nexus Planning and Sproule Consulting reports for inclusion in the Local Development Plan preparation and for use in the determination of relevant planning applications.

**Appendices:**

**Appendix 1**: Nexus Planning Retail Capacity Study – Executive Summary August 2017
**Appendix 2**: Nexus Planning Retail Capacity Study August 2017
**Appendix 3**: Sproule Consulting Reports – General Public and Business Surveys; Coleraine, Limavady, Ballymoney, Ballycastle, Portrush, Portstewart.