BALLYCLARE

TOWN CENTRE HEALTH CHECK

APRIL 2010

TRIBAL

Executive Summary

Introduction

Each of the Planning Policy Statement 5: Retailing and Town Centres indicators outlined in this Town Centre Health check can be brought together to present an overall picture of the vitality and viability of Ballyclare Town Centre. This in turn can then inform a 'SWOT Analysis', considering the relative strengths and weaknesses of the Town Centre, the opportunities to improve the overall vitality and viability of the centre and the factors that could threaten the success of improvements.

As part of the preparation of the Draft Belfast Metropolitan Area Plan (BMAP) 2015, a 'Health Check' for Ballyclare Town Centre was completed in 2003. It concluded that Ballyclare Town Centre was 'generally unhealthy', but suggested that proposed improvements in the convenience retail offer could act as a catalyst for regeneration and improvements in future vitality and viability:

> *"...generally fairly unhealthy, the development of a new Safeway superstore may trigger the qualitive improvements which are also necessary in the centre's comparison goods shopping provision."*

The information provided in this 'Health Check' therefore provides an overview of how Ballyclare Town Centre has changed over the past six years.

Accessibility

The 2003 Health Check reported a high reliance on private car and a consequent low proportion of shoppers walking, travelling by taxi or using the bus. This transport pattern appears to have remained the same in 2010. This high dependency on the car has led to chronic congestion on all the roads approaching Ballyclare Town Centre, which is exacerbated by a narrow carriageway width along Main Street, parked cars, the one way system around the town hall and confusing junction layouts in the south of the town centre.

A relief road is proposed to the west of the town in conjunction with the development of 2,430 homes. It is anticipated that this will lead to significant reductions of traffic volumes in the town centre, leading to more free-flowing traffic conditions within the centre.

There are two off-street car parks operated by Roads Service within Ballyclare town centre, as well as a large private car park associated with Asda. The public car parks appear to be used more in the winter than the summer. There are also a number of on-street parking bays available on Main Street and The Square.

Ballyclare has a bus station located about 500 metres to the south of The Square. There is also an hourly town bus service (356) which serves the bus station, the square and a number of outlying housing areas. The presence of a local service in a town of less than 10,000 people is a positive feature, although passenger demand appears to be too weak to support a more frequent service. There are also a limited number of bus links to Belfast, Antrim, Larne and Ballymena, although there are no services on a Sunday and only Belfast can be reached on a Saturday.

Pedestrians are catered for by footways on both sides of all approach roads, but are inadequate and narrow in some locations. There is no footway linking the Harrier Way car park into the town centre. Paving quality is variable, but recent improvements have been carried out in the heart of the town. There is little public space within the town centre, with the area around the town hall being given over to parking. The one-way system around the Square also effectively makes it a traffic roundabout.

The town centre streets are dominated by both parked and moving traffic, both visually and in terms of impact on pedestrian behaviour. Despite a number of good signal controlled pedestrian crossings, they are not located on pedestrian desire lines and can often be inconvenient and uncomfortable. There is currently no cycle provision within Ballyclare, but Roads Service would welcome a unified approach to the provision of cycle facilities in the future.

Land Use Profile

The land use survey recorded a total of 269 units within the town centre, of which 83 are residential units. With the exception of the vacancy rate, this is broadly comparable to the UK average distribution.

The number of convenience retail outlets has almost halved since 2001, but is now more akin with the national average. This provision is dominated by the new Asda superstore and adjacent Woodside's Supervalu. Of concern, the tow units vacated by Asda and Woodside's remain vacant.

Although the number of comparison outlets has increased slightly since 2001, the overall proportion has fallen almost six per cent. Comparison retail is also significantly below the national average. Distribution of comparison units throughout the centre is relatively even and contains a high proportion of independent, local businesses.

The survey reveals that the service sector is the strongest sector within Ballyclare town centre, representing almost half of the total units. The majority of these units are hair and beauty and takeaways, resulting in a weak leisure service sector. Despite the new Six Mile Leisure Centre, the development of a vibrant leisure economy would require more restaurants, cafes and assembly facilities.

The vacancy rate within Ballyclare is almost double the national average. Whilst this high rate can, to a certain extent, be explained as part of a baseline level of vacancy, it is likely that the continued high vacancy rate reflects the inadequacy of some of the units for modern retail. Some concentrations of vacant units or sites may, however, present a valuable opportunity for redevelopment.

Footfall

Footfall has increased significantly over the past seven years, suggesting improved vitality and increased viability for store consider location in the town. The top two locations remain the northern end of Main Street and the eastern side of the square, reflecting the strength of the traditional retail core in the north of Main Street. Friday remains the busiest day, suggesting that many local people choose to shop at other major centres, such as the Abbey Centre, Belfast City Centre and Ballymena, on a Saturday

However, there have been significant reductions in footfall to the southern end of Main Street, where a cluster of vacant units are found around the old Asda store. This underlines the importance of attracting a high footfall generator to anchor the south end of Main Street. Likewise, footfall has also fallen dramatically at North End, again with an associated cluster of vacant units.

Elsewhere, footfall continues to tail-off to the west side of the Square, although this remains broadly comparable to the pedestrian flows recorded in 2003. At the entrance to the park, pedestrian flows are only 20.3% of the peak flow. This suggests that the park is a significantly under-utilised resource, with a lack of attraction and poor linkages to the town centre. Nevertheless, with improvements this could become a major footfall generator in the south end of Main Street.

Market Indicators

The town of Ballyclare benefits from having a good reputation as a desirable commuter town in close proximity to Belfast, Antrim, Larne and Ballymena. Ballyclare is the dominant town within its surrounding hinterland serving smaller locations such as Ballynure, Parkgate, Straid, Doagh, Tildarg, Ballyrobert and Parkgate amongst others. The town centre is busy, reflecting this dominant status.

In terms of location, Ballyclare benefits from excellent road links to other population major centres which can be construed as both an asset (in terms of attracting custom and trade to the town) and a hindrance (in terms of facilitating leakage to competing retail centres). Resolving the considerable traffic congestion issues and attracting new better quality retailers to the town are key requirements to stemming any leakage and promoting the inflow of trade to the town centre.

The compact Town centre boasts a number of well established independent retailers in addition to a small number of multinationals. Notwithstanding the congestion issues, the accessibility and quantity of public car parking within the town centre is considered to be good at all but peak traffic times.

It is also apparent that the existing stock of town centre retail property is not suitable for modern retailers both in terms of specification and size. The character of, and feel within the town centre is being compromised by aging buildings and too many poor quality retail fascias. There is a lack of both good quality local and multinational retailers and other similar “footfall drivers”.

This is not to overstate the potential for attracting a wide range of multinationals. Due to its close proximity to Belfast, Ballymena, Glengormley and the Abbey Centre, Ballyclare will find it difficult to attract retailers already represented elsewhere within its catchment amidst their fears of “cannibalising” trade. Rather, Ballyclare will need to offer a point of difference, seeking to promote a retail offer different to what can be found in these larger locations. It is suggested that there is scope for Ballyclare to position itself such that it attracts niche / boutique retailers focusing on ladies, gents and kids fashion in addition to homewares and giftware.

There are distinct pockets of affluence within the Ballyclare catchment area and there is little doubt that a sufficient critical mass of good boutique stores could draw customers from Greater Belfast to Ballymena. There is little in Co. Antrim providing this retail offer and this should be construed as a key opportunity for Ballyclare town centre to offer a competitive advantage over rival retail centres.

Over the course of the masterplan timeframe we envisage there being demand to justify an addition to the existing stock of retail floorspace in the town centre. This is likely to be on the scale of a "streetscape" rather than a traditional covered Shopping Centre. It is concluded that the local independent sector would prefer to own the freeholds of their units therefore a new scheme would need to accommodate a mix of tenures. Any addition to the current stock of town centre floorspace should build on the strengths of the independent retail sector in Northern Ireland. These retailers are important attractors to the town centre. Future development should be of a large enough scale to accommodate a number of multinational brands. Multinational retailers like to cluster together.

More generally, shopping has become more of a leisure activity to be combined with other leisure / recreation and evening uses. Shopping has become more about fun and entertaining experiences. Improving the town centre should be retail led, but mixed-use incorporating as many alternative leisure attractors as possible. More restaurants and bars are stressed as potential ways to boost the evening economy and increase the vitality and vibrancy of the town centre. Such uses are conspicuous by their absence in the town and the proposed additions to the housing stock in the town can only further enhance the viability of these uses going forward.

All of which is set in the context of a town which is set to grow (with planning permission granted for 2,000 new homes) and which already comprises a number of large schools which will be of considerable benefit in attracting new retailers.

With a rejuvenated retail sector in which a number of new multinational retailers are attracted to the town along with new locally run fashion boutiques, complemented by an enhanced range of restaurants and cafes, Ballyclare would become an attractive place in which to live, work and visit.

Customer/Shopper Views

XXX

Retailer Views

XXX

Urban Design Appraisal

XXX

Summary and Conclusions

XXX

Strengths	Weaknesses
Adequate parking provision, making the town centre attractive and accessible.	High dependence on the private car as the mode of travel.
Bus station only a short walk from the town centre.	Chronic congestion on all approach roads to, and within, the town centre.
Presence of an hourly town bus service in a town of less than 10,000 people.	Limited public transport links, especially on a weekend.
Bus stops allow shoppers to alight at one end of town and board again at the other.	Inadequate and narrow footpaths in some areas of the town centre.
Recent public realm improvements carried out in the heart of the town centre.	One-way system around the town hall, effectively making it a traffic roundabout.
Land use distribution relatively even and broadly comparable with the UK averages.	Public space at the heart of the town given over to parking.
Increase in the level of convenience outlets since 2001.	Domination of cars, both visually and in terms of impact on pedestrian movement.
High proportion and good range of independent, local businesses.	Convenience retail provision dominated by Asda and Woodside's Supervalu.
Strong service sector.	Asda does not provide cross-trade to the rest of the town centre.
Some office accommodation contributing to daytime vitality.	Woodsides Supervalu is also physically disjointed from the town centre.
High proportion of residential accommodation in the town centre aiding vitality.	Limited representation of larger multinational retailers.
Significantly increased footfall since 2003, suggesting improved vitality and viability.	Commercial leisure service sector is relatively weak, despite the Leisure Centre.
Strong traditional retail core in the northern end of Main Street	High vacancy rate has remained since 2001.
Good strategic location within surrounding rural hinterland.	Low footfall associated with clusters of vacant units.
Market town status and large catchment population.	Local shoppers appear to choose competing centres on a Saturday.
Asda acts as an important anchor in the north of the town centre.	Very low pedestrian flows associated with the park.
Leisure Centre is an excellent resource and important attractor to the town centre.	Considerable leakage to nearby competing retail centres.
XXX	Offers little in terms of good quality restaurants and evening entertainment.
	One of the lowest levels of retail rents in Northern Ireland.
	Few recent property transactions within the Primary Retail Core.
	Little prospect of attracting a number of high profile multinational retailers.
	The Leisure Centre is not well integrated into the town centre.
	Pubs / bars and restaurants not particularly amenable to families and young people.
	Proliferation of low quality fast food outlets.
	XXX

Opportunities	Threats
Major population growth anticipated to the west of Ballyclare.	‘Challenging’ trading conditions as a result of the economic recession.
Ballyclare Relief Road is expected to reduce traffic volumes in the town centre.	A number of strong competitors.
Potential to improve cycling routes and facilities in the town centre.	New Asda stores in both Larne and Antrim may be to the detriment Ballyclare.
Clusters of vacant sites represent opportunity to deliver larger, modern retail units.	XXX
Park could act as a major footfall generator to the southern end of Main Street.	
Could provide suitable retail accommodation at a lower cost than competing centres.	
Public sector could facilitate assembly of a large site for new retail development.	
Provision of a better link between Asda and the established town centre retail core.	
Potential to attract a number of large multinational retailers.	
Potential to attract a number of Northern Irish and independent retailers.	
Refurbished smaller traditional units may be suitable for high end fashion boutiques.	
Potential for new small scale bulky goods floorspace.	
Significant expansion in the tourism economy of Northern Ireland.	
Potential to attract a children’s indoor play facilities to Ballyclare.	
Traditional terraced units on periphery could be converted back into residential use.	
XXX	

Contents

Figure 1.1: Ballyclare Town Centre

Key

1. Introduction

1.1 Purpose of this Report

This report considers a range of information that provides an indication of the vitality and viability of Ballyclare Town Centre. It has been prepared on behalf of the Department of Social Development and Newtownabbey Borough Council by Scott Wilson, in association with Colliers CRE, and will inform the formulation of a master plan for Ballyclare Town Centre.

1.2 Town Centre Health Checks

National planning policy on town centre and retail developments for all of Northern Ireland is contained in Planning Policy Statement 5: Retailing and Town Centres (June 1996), as amended by the draft replacement Planning Policy Statement 5: Retailing, Town Centres and Commercial Leisure Developments (July 2006). The national policy recognises the special difficulties that have faced Northern Ireland's town centres, many of which are now showing signs of revitalisation.

As part of the evidence base required to underpin the formulation statutory and development plans, therefore, the main purpose of a Town Centre Health Check is to provide a baseline position against which future performance can be measured and regular monitoring can be carried out over the plan period. However, Town Centre Heath Checks will also assist in the identification of early signs of decline in a centre and, in the case of Ballyclare Town Centre Regeneration Masterplan, will underpin the development of a non-statutory strategy to address any problems identified and provide a basis for the future enhancement of the centre.

The results of the Town Centre Health Check will be important in the consideration of the strategy for the town centre and in establishing a vision and role for the centre. It should provide information on "the overall strengths, weaknesses, threats and opportunities relating to town centres and of any key constraints affecting them."

In outlining the details of a Town Centre Health Check, Draft PPS5 states that the principal aim of a Town Centre Health Check is to "assess the vitality and viability of a town centre." Vitality is defined as a "measure of how busy a town centre is" and viability "a measure of its capacity to attract ongoing investment for maintenance, improvement and adaptation to changing retail needs."

In practice, measuring the vitality and viability of a town centre involves not just one indicator, but a series of them. PPS5 identifies the following indicators as key to providing the overall 'health check' of the town centre:

- Accessibility;
- Shopper/customer views;
- Retailer views (optional depending on time and resources);
- A comprehensive town centre land use survey, including the retail and commercial leisure land use profile;
- Vacancy rates;
- Pedestrian flow/footfall;
- Prime rental values (optional depending on data availability);

- Environmental quality, including the physical condition of the town centre, environmental attributes and the quality of the built and natural environment; and
- Physical structure of the centre, including opportunities and constraints.

1.3 Ballyclare Town Centre

Ballyclare is the largest settlement within the rural part of Newtownabbey Borough, lying approximately 12 miles north of Belfast. It is situated in the north west of the Borough on the lower slopes of the Six Mile Water Valley, close to the moorland summits in the north and Craig Hill to the east. The town has medieval origins, still seen today in the motte to the south of the town centre, and the present street pattern with its broad main street dates back to the eighteenth century. A clock tower/keep is the central focus of the town centre.

Ballyclare is a local service centre with a significant dormitory role in relation to the Belfast Metropolitan Area (BMA). It is the fifth largest centre in terms of retail floor space within the BMA, following Belfast, Lisburn, Bangor and Carrikfergus, and is the main focus within the rural area for housing, shopping and commerce, industry and employment, education and recreation. It has a range of restaurants, pubs, cafes, retail outlets and leisure uses, principally along Main Street and around Market Square. The population of the town has grown significantly in over the last 35 years, from 1,999 in 1971 to over 9,000 at present.

The town centre boundary is defined within the draft Belfast Metropolitan Area Plan (BMAP) 2015 and is designated to encompass the concentration of all existing and planned uses which have a town centre function. These include retailing, professional services, restaurants, banking, estate agents, other office uses and community uses. The boundary includes Main Street and Market Square, extending in a northerly direction along North End and along part of Rashee Road and Ballyeaston Road. Properties located along Mill Road, Park Street and Harrier Way and the Six Mile Water Leisure Centre are also included. The boundary takes account of extant planning permission for retail development and includes land between Main Street and Six Mile Water Leisure Centre and land between 22-26 Main Street and Park Street.

The draft Plan recognises a need to retain consumer spending in Ballyclare Town Centre and attract national retailers by providing greater choice, quality and layout of retail provision. It also notes a number of urban design issues, including the presence of poor frontage and poor quality infill developments, major areas of underdeveloped or under used backland, poor linkages to the areas of backland from the town centre, poor frontage along the riverside and underdeveloped links between the Main Street and the river.

1.4 Previous Town Centre Health Check, June 2003

As part of the preparation of the Draft BMAP, Colliers CRE were commissioned by the Department of Environment, Planning Service to complete a 'Health Check' for Ballyclare Town Centre. This was completed in 2003 alongside

‘Health Checks’ for six other main Town Centres within the Belfast Metropolitian Area - Belfast, Lisburn, Holywood, Bangor, Carrickfergus and Carryduff - and provided an indication of how Ballyclare was performing in comparison to these nearby centres.

Each of the indicators considered was assigned a score between 1 and 5 , with equal ‘weight’ attributed to each. An average score was then calculated as a basis for comparison between the seven centres. Ballyclare received the lowest score of all seven town centres at 2.3. For comparison, Lisburn recieved the highest score at 3.9.

The report therefore concluded that Ballyclare Town Centre was ‘generally unhealthy’, but suggested that proposed improvements in the convenience retail offer could act as a catalyst for regeneration and improvements in future vitality and viability:

> *“...generally fairly unhealthy, the development of a new Safeway superstore may trigger the qualitive improvements which are also necessary in the centre’s comparison goods shopping provision.”*

Each section of this ‘Health Check’ contains a summary of the findings for the respective indicator from the 2003 study. The information is then compared to the current status to provide an overview of how Ballyclare Town Centre has changed over the past six years.

1.5 Broad Methodology

In accordance with the methodology outlined in PPS5, the Town Centre Health Check for Ballyclare represents the culmination of a number of distinct strands of work. A detailed summary of the methodology and source of information for each indicator is contained within the relevent section, however the survey work undertaken can be summarised as follows:

- Desktop Review: A detailed review and analysis of existing published reports, plans and data sources;
- Pedestrian Flow Counts: A survey of foot fall throughout the town centre.
- Physical Town Centre Survey: Direct observation of the environment, retail offer and trading dynamics within the town centre;
- Household Survey: A telephone survey within a defined catchment area to provide robust data relating to:
  - Retail floorspace need/capacity;
  - Local catchment area;
  - Geographical trade penetration;
  - Levels and patterns of consumer expenditure; and
  - Consumer attitudes towards the town centre.
- Shoppers Survey: A series structure, face-to-face street interviews with shoppers in Ballyclare Town Centre;
- Retailers Survey: A series of questionnaires completed by the ‘manager’ or ‘owner’ of units within Ballyclare Town Centre; and
- Commercial/Market Analysis: An analysis of the commercial/market performance, demand and associated issues.

1.6 The Structure of the Report

This report is structured, broadly speaking, around these key PPS5 indicators and can be summarised as follows:

- **Section 2:** Accessibility;
- **Section 3:** Land Use Profile;
- **Section 4:** Footfall;
- **Section 5:** Market Indicators;
- **Section 6:** Customer/Shopper Views;
- **Section 7:** Retailer Views
- **Section 8:** Urban Design Appraisal; and
- **Section 9:** Summary and Conclusions.

2. Accessibility

2.1 Introduction

This section provides an overview of the accessibility of Ballycalre Town Centre as an indicator of vitality and viability. Within PPS5, accessibility is defined as “the ease and convenience of access to a town centre by a choice of travel modes.” Consequently, the accessibility indictor within a Town Centre Health Check should include:

- The location of the centre in relation to the strategic road network;
- The frequency and quality of public transport services, including the number of destinations and linkages to surrounding uses;
- The quality, quantity and type of car parking; and
- The quality of provision for disabled people, pedestrians and cyclists.

The strength of the centre will be dependent not only on the quality and diversity of offer, but also the degree of accessibility, which in turn influences the size and character of the catchment area. Its competitive position will depend on these characteristics compared to those of other centres. Within Ballyclare itself, the degree to which the centre is linked or complementary to other facilities in the town will also be a key factor in determining its strength.

2.2 2003 Town Centre Health Check

In 2003, The Town Centre Health Check found that the private car was by far the most commonly used mode of transport to access Ballyclare town centre. 73% of shoppers indicated that they drive to the centre, whilst another 14% would travel as car passengers. Such was the reliance on the car that other transport modes were seldom used; only 6% walked to the town centre, 5% travelled by taxi and just 1% used the bus.

The heavy reliance on car travel for shopping, combined with the town’s role as a transport pinch point, lead at that time to high levels of traffic congestion and a desire to reduce it. Around two-thirds of shoppers and retailers suggested that reductions in traffic congestion would be welcome, “making this issue crucial to the future enhancement of Ballyclare as a retail destination.”

The report also found that 60% of shoppers and 27% of retailers would welcome improvements to the car parking facilities at that time.

2.3 Travel by Private Car

Despite the high reliance on the private car remaining, about a quarter of households in Ballyclare had no access to a car or van in 2001, a little lower than the Northern Ireland average. The proportion of households with access to two cars or vans was 28%, a little higher than the 24% average (see Figure 2.1 overleaf). Mode split data are available only for the journey to work.

There are reports from Roads Service and from the local sources that the congestion reported in 2003 still occurs on roads within and approaching Ballyclare town centre. However, there appear to be no data on the delays experienced, such as the impact on journey times, variability from hour to hour or day to day. The causes of delay are judged to be as follows:

Figure 2.1: Journey to work mode split (Census)

Main Mode	% NISRA data for 2001	% Census data quoted in RPS Transport Assessment
Car/Van/MC Driver	63	79
Car/Van Passenger	8	79
Car/Van Pool	5	79
Walk	11	13
Public Transport/Taxi	7	7
Cycle	0.5	1
Other	5.5	-
Work from Home	-	-
Total	**100**	**100**

Figure 2.2: Heavy Traffic at Main Street and Green Road Junction Mid-afternoon

- Narrow available carriageway width along the Main Street;
- Parked cars along Main Street;
- Junction layouts at Mill Road/Hillhead Road and Main Street/Ballyclare Road, and the one way system around the town hall"

From traffic counts undertaken in November 2009 at the Asda roundabout, it appears that the morning peak hour is from 8.30 to 9.30.

The Ballyclare west relief road (BRR) is to be built in conjunction with the development of 2,430 homes, and will be funded by the development. The road has been justified (in part) in BMAP by the relief it might bring to town centre traffic. The development site and route of the BRR are shown in Figure 2.3.

The likely traffic impacts of the BRR have been analysed in the Transport Assessment for the development (RPS). At the time of writing the results were still pending verification with Roads Service, but the indications are that the project will lead to significant reductions of traffic volumes in the town centre.

The following are key points from the Transport Assessment as at March 10, 2010, prepared by RPS:

- "Due to BRR providing an alternative link over the Six Mile Valley and into the strategic network for commuter traffic it is clear that traffic on the majority of links within the Town Centre will experience a significant decrease in traffic volumes…”;

- Ballyclare bound traffic at Lindsey Corner will no longer use station road – 60% will use BRR instead;
- 30% traffic on Mill Road will transfer to BRR;
- 50% traffic on Rashee Road heading into Ballyclare will use BRR, 30% northbound; and
- Dough Road – 20% Ballyclare bound traffic diverted

The report concludes:

> *“…proposed development will have a nominal impact on the adjacent road network in Ballyclare with the provision of the BRR. The construction of the proposed BRR will lead to traffic volumes within the Town Centre decreasing significantly, leading to more free-flowing traffic conditions within Ballyclare Town Centre.”*

According to RPS the expected traffic reductions will lead “to more free-flowing traffic conditions within Ballyclare Town Centre”. While that is likely to be the case if the town centre road network and management remains unchanged, the gains from traffic reduction can be “consumed” in other ways, such as greater provision for pedestrians, or priority for buses, or more roadspace made available for parking and servicing activity. It should not be automatically assumed that the best way of using the benefit is to speed the flow of vehicular traffic. Indeed, in a town centre environment giving priority to benefiting the economy and environmental conditions may be more appropriate than journey time savings. This is likely to be a key issue for the development framework for Ballyclare.

Figure 2.3: Proposed New Development and Relief Road

Figure 2.4: Roads Service Parking Provision in Ballyclare Town Centre

Location	No. of Spaces	No. of Disabled Spaces	Tarrif Category
Harrier Way	100	No	T13
Harrier Way	33	Yes	None
Market Square	53	No	T13
Total	**186**	**-**	**-**

Tariff category t13 is as follows

Time	Price (£)
Up to 1 hour / Within 1 hour of closing	0.30
Over 1 hour and not exceeding 2 hours	0.60
Over 2 hour and not exceeding 3 hours	0.90
Over 3 hour and not exceeding 4 hours	1.20
Over 4 hour and not exceeding 5 hours	1.50
Over 5 hour and not exceeding 6 hours	1.80
Over 6 hour and not exceeding 7 hours	2.10
Over 7 hour and not exceeding 8 hours	2.40
Over 8 hours	2.70

Figure 2.5: Usage of Ballyclare Pay an Display Car Parks (two sample periods)

Car Park	Machine No.	11-17th July 2009	7-13th November 2009
Market Square	BLC004	372	464
	BLC005	184	558
	Total	**556**	**1,022**
Harrier Way	BLC001	178	337
	BLC002	230	440
	BLC003	258	432
	Total	**666**	**1,209**

Parking

There are two off-street pubic car parks operated by Roads Service in Ballyclare town centre. These are shown in Figure 2.4 below (from RS website: *http://applications.roadsni.gov.uk/carparking/TownCarparks.aspx*).

The usage pattern for the two charged car parks in Ballyclare are shown in Figure 2.5 for two sample periods (summer and winter). This indicates that there is much greater usage in the winter than in the summer. The daily average number of parking acts is 175 in the summer, and 318 in winter.

There are in addition private off-street car parks associated with individual land uses. By far the largest of these is the Asda car park, which with around 200 spaces exceeds the total number of public spaces.

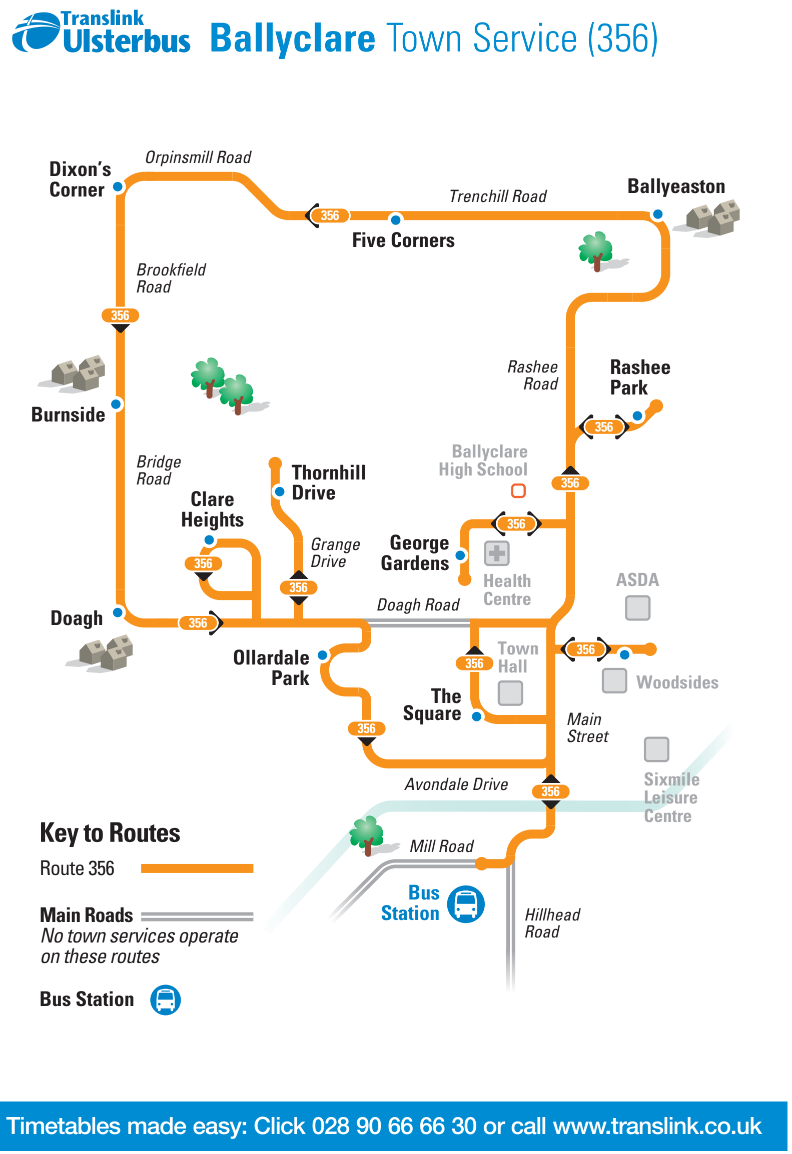
On-street parking is available in marked bays on Main Street and The Square, at unmarked kerbside elsewhere, without restriction or charge. Yellow line parking restrictions apply on Main Street and around The Square. Although there are no data, many of the on-street parking opportunities closest to The Square appear to be used by long-stay parkers. Enforcement of the yellow line restrictions appears to be effective.

2.4 Public Transport

Buses

Ballyclare has a bus station with a limited park and ride function. It is located about 500 metres (about 7 minutes walk) from the square.

Figure 2.6: Ballyclare Town Bus Service



There is a town bus service in Ballyclare, number 356, performed by a single vehicle making an hourly one-way tour of some of the housing areas and out-lying places such as Ballyeaston and Burnside. It starts and ends by calling at the bus station and the square.

The presence of a local service in a town of less than 10,000 people is a positive feature, although passenger demand appears to be too weak to support a frequent and comprehensive service. The 356 is likely to be used only by people without a car at their disposal, and only for shopping. It cannot be used for journeys to work because it does not operate in the peak hours. Apart from the limited hours of service (Mondays to Fridays only, between 9.15 and 17.50), the service is slow. It provides a classic example of why buses should not be run as circular tours. For example, From The Square to Ballyeaston takes 9 minutes, but to get from Ballyeaston to The Square takes 32 minutes! The route diagram is reproduced in Figure 2.6.

Bus links to other towns are provided by the following services:

- Belfast: 153 and 153A, otherwise numbered as 553A (via Glengormley) runs Mondays to Fridays (17 journeys) and Saturdays (11 journeys);
- Belfast express (via motorway) between Ballyclare Bus Station and Belfast: 253, peak hour only;
- Antrim 154/156: 8 times daily Monday to Friday only from Ballyclare Bus Station (in the afternoon the service also goes to Larne);
- Ballymena, route 148 (changed from 149) runs twice a day Mondays to Fridays only.

There are no bus services on a Sunday, and on Saturday only Belfast can be reached.

It is fairly clear from the above summary that bus services are fairly rudimentary and difficult to understand, and are therefore unlikely to appeal to people with a car at their disposal. The 2001 census stated that 79% of public transport users in Ballyclare came from households with access to a car. But of course not everyone in a household has exclusive access to the car.

There are currently no proposals to provide any bus priority in Ballyclare. Buses are subjected to the same delays experienced by general traffic, and this can disrupt journey schedules and reliability.

The two stops serving The Square are on opposite sides of The Square. The other main pair of stops for the town centre is at the lower part of Main Street. This enables shoppers to alight at one end of Main Street, and board at the other end having completed their shopping tour. The bus station is not convenient for the main shopping area: although the walking time is not excessive, it is more than would normally be tolerated by shoppers. Most services, however, serve The Square and Main Street as well as the bus station.

The residents survey revealed that 14.10% of shoppers travel to their local centre by bus. In the shoppers survey, none of the visitors to Ballyclare surveyed had travelled to the town centre by bus. By comparison 67.67% had travelled in a private car and 31.30% had walked.

Taxis

There are three taxi companies in Ballyclare, and a further three in the area around the town.

2.5 Pedestrian and Cycle Provision

Pedestrians are catered for by footways on both sides of all the approach roads to and within the town centre. Some of these are quite narrow, with inadequate width for more than two people to pass, for example North End (east side) and the southern end of Main Street. Harrier Way is the main link from the Harrier Way car parks into the town centre, but it has no footway for most of its length (see Figure 2.7).

Paving quality is variable, but recent improvements have been carried out in the heart of the town centre. These improvements have been carried out on the basis that the traffic arrangements will continue as at present, with two-way working in most of Main Street, and one-way working around the town hall square.

There are very few spaces where people can rest or sojourn. The space around the town hall is given over to car parking, partly public and partly private. The town hall is encircled by one-way traffic, which in effect makes it a traffic roundabout. The square cannot in this configuration function as a social space or focal point for the town. The railings, gates and warning signs also detract from any civic character.

Two small spaces have received some landscaping attention in the town centre. The first is a small triangular

Figure 2.7: Harrier Way - main link to public parking and yet has inadequate footways.

Figure 2.9: Town hall square – no place for people

Figure 2.8: Green Road and Ballynure Road - parts of the road network have unpleasant and inconvenient pedestrian provision.

Figure 2.10: Millburn Mews - no place to walk; lack of concern for pedestrians

space has been paved and planted in North End, but it has no seating, and railings prevent people walking through it, and so it is not used. The second is a small space at Mill Street and Main Street junction, which does have bench seating, but the busy traffic environment and lack of frontage activity makes it an unpleasant place to be. There are apparently no other places to sit in the town centre, and space that potentially could be used as amenity space is almost all occupied with vehicle parking or servicing. The result is a town centre that has very little appeal as a place to spend time, to meet, or relax.

The town centre streets are dominated by moving and parked vehicles, both visually and in terms of impact on pedestrian behaviour. Crossing the street for the most part involves finding a gap in the traffic. There are significant stretches of Main Street that have no provision for pedestrian crossing movements, and observation shows that many people "shelter" behind parked vehicles to shorten their crossing distance. The streets are laid out and managed as traffic priority areas, and drivers tend to perceive that they have unbroken right of way.

Signal controlled crossings are provided at two locations in Main Street, and at some other locations in the town such as outside Ballyclare primary school in Doagh Road.

Informal crossing places are provided in other locations, especially junctions, mostly with level surface (dropped kerb) provision. However, these provisions are often located for the convenience of drivers rather than pedestrians. For example they are set back from the desire line across the junction at George Avenue off Rashee Road, and Avondale Drive off Main Street. At junctions with "splitter islands" pedestrians have to cross the street in two or more separate stages, for example at the Asda junction (North End) and Doagh Road at the town hall square. These arrangements may be regarded as safe, but they are not convenient or comfortable, and contribute to the traffic domination of the environment.

The Asda store has been developed without regard to access on foot. The store is set well away from the road and the front door faces the car park and is not visible from the most direct walking route from the town centre.

Cycle movement and parking

There are no cycle routes in Ballyclare. No publicly available cycle parking in Ballyclare town centre has been recorded. From observation, cycling accounts for a small proportion of travel in Ballyclare, although no data are available.

The new link and relief roads in connection with the major 2,340 home development to the north west of Ballyclare will have shared foot/cycle paths on the southeast side.

There are few cycle parking opportunities in the town centres, but it is intended to improve provision in future, as a low cost measure to boost cycling. Roads Service would welcome a unified approach to the provision for cycling in the town centres. This might include, for example, whether provision should be in advance of demand or whether it should follow demand, and whether provision of cycle routes should be on road, shared, or separate. (Information from Roads Service cycling officer, Brian Bailey.)

3. Land Use Profile

3.1 Introduction

In accordance with the guidance outlined in PPS5, this section of the health check reports the findings of the comprehensive town centre land use survey. This provides details of the proportion and broad location of specific land uses within the centre, as well as the proportion of vacant street level floorspace within the primary retail core. Finally, this section contains a brief retail profile, covering the existing composition, retailer demand and other potential changes.

Successful centres are diverse centres that perform a variety of roles to attract a wide range of visitors and shoppers at all times of the day. PPS5 identifies the importance of diversity to the success of a centre.

3.2 2003 Town Centre Health Check

Land Use Profile and Distribution

Ballyclare had a total of 9,587 sq m of net floorspace in 2003. This made it the fifth largest centre within the Belfast Metropolitan Area at that time, although it was someway behind the major centres of Belfast, Lisburn and Bangor. In terms of non-bulky comparison goods shopping, it was also marginally smaller than Holywood.

The shortage of non-bulky comparison goods floorspace – normally the mainstay of town centres – was one of the main weaknesses identified. It accounted for only 20% of the available stock; around half of the space occupied by the food offer, and broadly comparable to the floorspace taken-up by retail services and voids. This resulted in a major leakage of comparison goods expenditure from the local area.

Although the town centre also contained a relatively large number of pubs and a few cafes, the leisure offer was considered fairly weak, with a shortage of restaurants and other evening facilities such as clubs and a cinema.

In terms of diversity of uses within Ballyclare town centre, the 2003 study concluded the following key points:

- The principal area for comparison goods retailing was along Main Street; although there was relatively little provision in the town centre as a whole;
- Convenience goods shopping was also mainly concentrated along Main Street and on the east side of Market Square; the two major food stores of Woodsides (Market Square) and Safeway (Main Street) were easily identified;
- Service uses were scattered throughout the town centre, with particular concentrations along the southern section of Main Street and fronting onto Market Square; and
- There was a major concentration of vacant outlets in the northern area of the town centre around North End and Rashee Road.

Vacancy Rate

Floorspace data provided by Planning Service confirmed that in 2001 there was 1,558 sq m net of vacant floorspace in Ballyclare town centre. This total represented 17% of the entire stock, the highest proportion of any of the town centres within the Belfast Metropolitan Area. In practice this was almost as much as the quantum of occupied non-bulky comparison goods floorspace (1,997 sq m net, 20%).

The 2003 report concluded that there was clearly a need to reduce this level of voids, but noted that much of it was "located away from the prime pitch" meaning that "the accommodation may not therefore be attractive to modern retailers."

Retail Profile

Compared to Belfast City Centre, the retail offer of Ballyclare town centre was recorded as very modest and as biased towards food shopping. The 2003 report noted that "present demand for representation in the centre is modest and primarily restricted to a number of value orientated retailers, who generally seek a prime location in Main Street."

However, at that time it was thought that Ballyclare had the potential for its retail offer to grow as a direct result of the significant amount of new housing starts which were particularly aimed at first time buyers and commuters. It was suggested that this would provide a boost to locally available retail expenditure.

In 2003, the existing Safeway store had recognised this trading opportunity and anticipated opening a town centre superstore by September 2004 (they were later taken over by Asda). The 2003 'Health Check' concluded:

> *"...the presence of such a facility should assist the retention of consumer spending in the town centre which will then present an opportunity for developers to create further town centre floorspace for national retailers."*

The report also found that existing traditional retail property in the town centre was of insufficient size and quality to attract Irish or UK national retailers. It concluded that "new retail development should address this issue."

3.3 Land Use Profile and Distribution

The diversity of uses within a town centre contributes to the attractiveness of the centre to the local community. For the purpose of the land use survey, retail units have been divided into convenience and comparison businesses, with separate categories recorded for service uses. Those units which do not fall easily within any of these three main categories have been grouped into a forth 'miscellaneous' category.

The definition used for each of these categories is as follows:

- ***Convenience:*** Bakers and confectioners, butchers, confectionery, delicatessens, fishmongers, frozen foods, greengrocers, general grocers, health foods, markets, off licences, shoe repairs and key cutting, supermarkets, tobacco & newsagents, etc.

- ***Comparison:*** Art/art dealers, booksellers, carpets and flooring, catalogue showrooms, charity shops, chemists, clothing, crafts, gifts, china and glass, cycles and accessories, department and variety stores, DIY and home improvement, electrical and durable goods, fashion accessories, florists, footwear, furniture, gardens and equipment, greeting cards, hardware and household goods, jewellery and watches, leather and travel goods, music, musical instruments and music and video recordings, stationers/office supplies, photographic and optical, secondhand goods, sports, camping and leisure goods, telephones and accessories, textiles and soft furnishings, toiletries, cosmetics and beauty products, toys, games and hobbies, vehicle/motorcycle sales and accessories, etc.

- ***Service:*** Retail Services (e.g. dry cleaners/launderettes, filling stations, hair dressers/beauty parlours, opticians, photo studios, repairs, alterations and restoration, travel agents, vehicle repairs/services, video/DVD rental, etc.); Leisure Services (e.g. bars/wine bars, bingo/amusements, bowling alley, cafes, casinos/ bBetting offices, cinemas, clubs/community centres, disco/nightclubs, fast food/take aways, hotels/guest houses, public houses, restaurants, sports and leisure facilities, etc.); Financial/Business Services (banks/ building societies, employment/careers advisors, estate/ letting agents, financial services, legal services, etc.); Public Services (e.g. Government/municipal buildings, emergency services, libraries, museums, art galleries, etc.) and Health/Medical Services, etc.

- ***Miscellaneous:*** Employment uses (offices, works, warehouses and factories, etc.), religious institutions and transport services, etc.

The survey recorded a total of 186 units within the town centre boundary. An additional 83 residential units are also present, providing a combined total of 269. The distribution of these units is shown in Figure 3.2 Land Use Distribution on the following page. With the exception of the vacancy rate (see Section 3.4 Vacancy Rates), the survey reveals that the proportion and distribution is broadly comparable with the UK averages.

Figure 3.1 Land Use Composition

	2001*		2010		All UK Centres Base (%)†
	Number of Outlets	Proportion (%)	Number of Outlets	Proportion (%)	
Convenience	22	18.03	12	6.45	7.68
Comparison	30	24.59	35	18.82	29.82
Services	39	31.97	91	48.92	43.10
Miscellaneous	-	-	15	8.06	9.44
Vacant	31	25.41	33	17.74	9.96
Total	**122**	**-**	**167**	**-**	**-**

* *Source: Draft Belfast Metropolitan Area Plan (BMAP) 2015 Technical Supplement 4: Retailing (June 2003)*
† *Source: Experian Goad, October 2007*

Figure 3.2: Land Use Distribution

Whilst the number of convenience retail outlets has almost halved since 2001, the current level (6.45%) is more akin with the national average of 7.68%. It is worth noting that the 2001 level was almost ten percentage points above the current national average.

Whilst there are a few small, independent convenience retailers throughout the centre, it is notable that the centre is dominated by the new ASDA superstore and adjacent new Woodside's Supervalu. Therefore, although the construction of these new premesis since 2001 have led to a reduction in the number of outlets, it is likely that the overall convenience floorspace has increased. Of concern, it is notable that the two units vacated by ASDA (Safeway at the time of the 2003 Health Check) and Woodside's stores are now vacant and have been unable to attract alternative occupiers. It is likely that comprehensive re-development would be required to provide suitable modern retail units on these sites. Whilst this provides a significant opportunity to improve the physical structure of the town centre, it remains to be seen whether a market exists for such units in the current economic climate.

Although the number of comparison outlets has increased slightly since 2001, the overall proportion within the town centre has fallen by almost six per cent. This is mainly accounted for by the inclusion of the 'Miscellaneous' category, which was excluded from the 2001 figures. However, the current level of 18.82% remains significantly below the national average of 29.82%.

In terms of distribution, the comparison units are spread evenly throughout the entire town centre, with small clusters towards the north end and south end of Main Street. Although there are a few national multiples within Ballyclare (e.g. Boots, Peacocks), the majority of the retailers are independent, local businesses. Whilst this may from one perspective be considered a strength of the centre, it raises questions concerning the long-term growth potential of the centre if national retailers consider it unattractive.

In terms of comparison retail floorspace...

XXX

"...shortage of non-bulky comparison goods floorspace - normally the mainstay of town centres - is evident"

This "...explains why there is so much leakage of comparison goods expenditure from the local area."

The survey reveals that the service sector is by far the strongest sector within Ballyclare town centre. Representing almost half of the total availble units, the proportion of services is over five percentage points above the UK average of 43.1%. As with the conclusion of the 2001 town centre health check, the service uses remain scattered throughout the town centre, with particular concentrations on Main Street and fronting onto Market Square.

Although there are a good number of cafes, restaurants and public houses, the majority of the service uses consist of hair dressers/barbers, opticians and takeaways. Therefore, despite the inclusion of the new Six Mile Leisure Centre within the revised town centre boundary*, the leisure offer of Ballyclare remains 'weak'. The development of a vibrant leisure economy would therefore require additional restaurants/cafes and other assembly facilities such as a cinema, theatre or club.

However...catchment...viable??

Finally, the level of miscellaneous units within Ballycalre is relatively low and broadly in accordance with the national averages. The majority of these units are some form of offices, generally located above retail premeses, which contribute to the day-time vitality and deliver a more sustainable form of development that maximises existing infrastructure and access to services.

3.4 Vacancy Rates

The vacancy rate recorded within the land use survey incorporates any vacant retail or employment unuts, gap sites within the main street frontages and derelict buildings. With 33 out of the 167 units within Ballyclare town centre being considered vacant, the proportion is almost double the national average.

* *The Draft Belfast Metropolitan Area Plan (BMAP) 2015 (June 2003) contains a revised town centre boundary for Ballyclare*

All town centres experience a bseline level of vacancy rates, even in the strongest centres. In many cases, for example, premises are often vacant while they are being refurbished. A high vacancy rate should therefore not always be interpreted as a sign of weakness. A large number of vacant units within a centre, however, may indicate decline related to poor performance of the centre or that the floorspace is inadequate to meet the demands of modern retailers.

To a certain extent, the high vacancy rate in Ballyclare can be partially explained as part of a baseline level; for example, the total number of vacant units has fallen by two since 2001. However, with such a high level of vacancy, it is prudent to assume that there are more underlying weaknesses contributing to the number.

In 2001, the Town Centre Health Check recorded a "major concentration of vacant outlets in the northern area of the town centre around North End and Rashee Road." Nine years later, despit the comprehensive redevelopment of junction between North End, Rashee Road and Ballyeaston Road, there remains a strong concentration on the eastern side of North End and at the southern end of Rashee Road. A number of these traditional units are former residential units that, given the time they have remained vacant, can probably be considered too small to accommodate larger, modern retailers.

In addition, new concentrations of vacant units have been established in the area surrounding the former ASDA on Main Street and surrounding the former Woodside's store fronting onto Market Square. As previously mentioned, both of these retailers have recently moved to larger, purpose built premesis on the land behind Main Street, again suggesting that these units are outdated and unsuited to the requirements of modern retailers.

These concentrations provide a number of valuable opportunities to improve the physical structure and environmental quality of the town centre. For example, the site of the former ASDA store and the adjacent derelict land present an opportunity to deliver a larger retail unit to anchor the sothern end of Main Street. This may also provide scope to strengthen connections to the Six Mile Water Park and Leisure Centre.

In addition, we understand that proposals have been developed in the past to deliver a number of larger retail units fronting onto North End, Market Square and Main Street. The old Woodside's unit, for example, had plans for two 5,000 sq. ft. units with apartments above, whilst the owner of the units from the Ballyboe pub to the North End roundabout had plans for a 5,000 sq. ft. unit. However, to date non of these schemes have been delivered.

3.5 Residential Units

The 83 residential units within Ballyclare Town Centre account for approximately 29.23% of the total number of units within the town centre. They are generally located around the periphery, with the majority being associated with the allocated Protected Housing Area along the Ballyeaston and Ballycurr Roads in the north (see Figure 3.2 Land Use Distribution on page 16).

The Draft Belfast Metropolitan Area Plan (BMAP) 2015 recognises the valuable contribution such housing stock makes to the variety and vitality of life in a town centre and seeks to restrict the spread of commercial uses into such areas that have a "useful longer-term residential life." It is widely accepted that town centre living provides a more sustainable pattern of development, assists urban regeneneration and optimises existing infrastructure.

It encourages the development of 'walkable communities', which provide environmental benefits by reducing the need to travel by private car, and community benefits to people such as the elderley and young people who don't have access to a car. It can also help revitalise the physical fabric of a town centre through the re-use of vacant buildings and the redevelopment of derelict or otherwise unattractive land. Housing can also provide benefits in terms of activity and surveillance outside normal commercial hours, helping to improve safety and security in the town centre and supporting the growth of an evening economy.
Therefore, although the proportion of residential units within Ballyclare Town Centre can be considered relatively high (almost one third), it is accepted that such units do help contribute to the vitality and viability of the centre.

3.6 Retail Profile

XXX

4. Footfall

Introduction

Pedestrian flows provide a useful indicator of relative strengths of different parts of a town centre. In accordance with the guidance outlined in PPS5, pedestrian flows, or footfall surveys, have been completed at a variety of locations around Ballyclare Town Centre, providing details of the numbers and movement of people on the streets at different times of the day.

Pedestrian counts provide ‘hard’ data on the absolute levels of foot fall throughout a town and enable relative levels of customer flows to be identified and mapped.

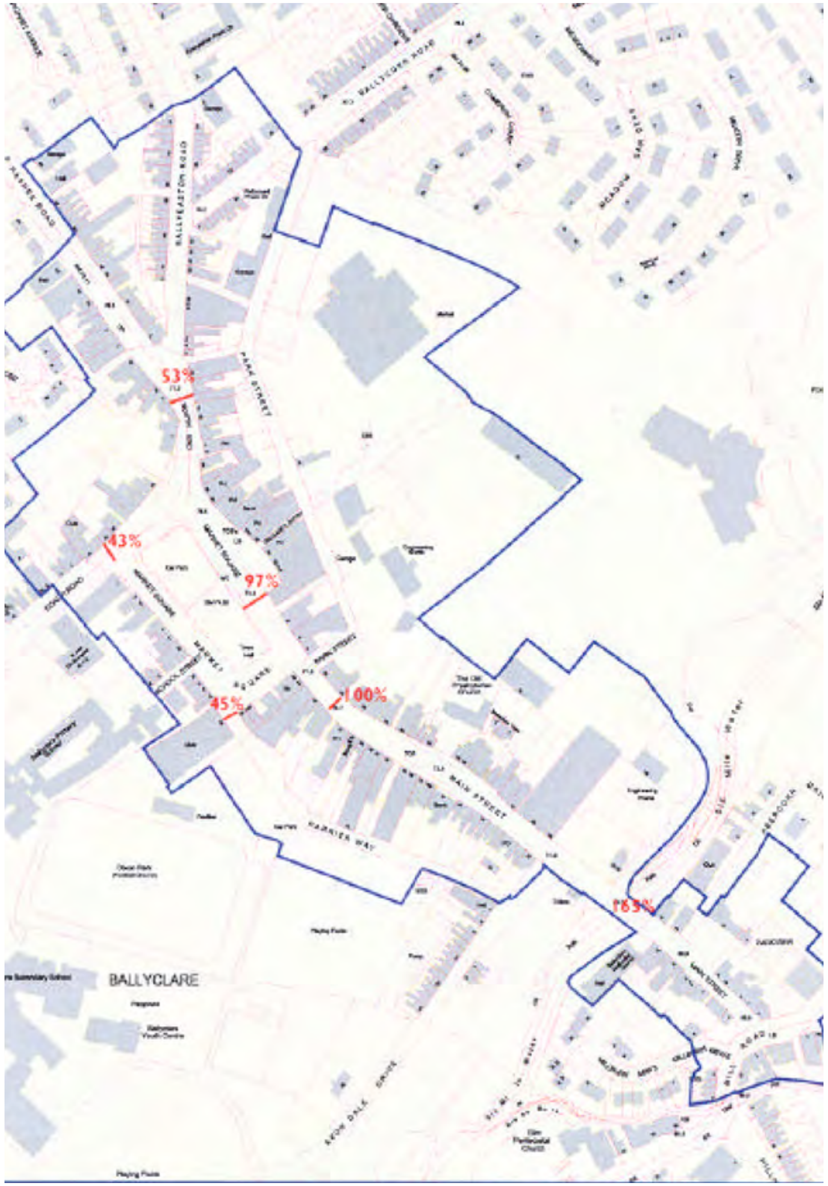
4.2 2003 Town Centre Health Check

As part of the 2003 study, pedestrian flow counts were undertaken at six locations within Ballyclare town centre over a period of three days.

The highest three day footfall was on Main Street with a two-way flow of 10,820. This was, however, the lowest peak flow of any BMAP centre. Flows were almost as high on the east side of Market Square, but tended to tail off considerably in other parts of the town centre.

Unusually, Saturday was not the busiest day (peak flow 3,600), but Friday (4,380). This suggested that “on the main shopping day, many local people choose to shop at other major centres; for example, the Abbey Centre or Belfast City Centre.”

Figure 4.1: Pedestrian Flows Expressed as a Proportion of Peak Flow (%), June 2003.



4.3 Methodology

Two-way pedestrian flow counts were undertaken at seven locations within Ballyclare town centre. Six of these locations correspond with the six locations recorded as part of the 2003 Health Check to allow for direct comparisons. The seventh point was added to enable a greater breakdown of footfall monitoring of the success of planned improvements to the park. The locations of all count points were agreed with the Department of Social Development prior to the survey.

The counts took place between 10.00 hours and 16.00 hours daily on Friday 9 April 2010 and Saturday 10 April 2010. At each point pedestrian flows were counted for an agreed period of time each hour in both directions. The results were then grossed up to produce equivalent hourly flows in each direction at every point. The sum of the hourly flows for the six hour period gives the estimated daily flows.

The numbers quoted as part of the footfall survey therefore represent estimates of the total number of pedestrians passing each survey point over a six hour period between the hours of 10:00 and 16:00 on a Friday and Saturday, and during the whole week (Monday-Saturday). The numbers given for the whole week are the sums of those given for Friday, multiplied by five to allow for the days Monday-Thursday, which were not enumerated, and Saturday.

The indices given in the Figure 4.2 for Friday, Saturday and the whole week are percentages based upon the flow at the busiest of all seven count points, which is benchmarked at 100 percent. Figure 4.3 then shows the indexed count points relative to the average pedestrian flow and indicates the locational hierarchy throughout the town centre.

Figure 4.2 Pedestrian Counts in Ballyclare Town Centre

Enumeration Point		Friday		Saturday		Week	
		Count	Index	Count	Index	Count	Index
1	Crazy Pets, 14-18 North End	1.725	33.5	1.325	27.7	9.950	32.6
2	Debs Diner, 26 Dough Road	2.600	50.5	1.675	35.1	14.675	48.1
3	Town Hall - Old Woodsides, 8-12 Market Square	5.150	100.0	4.775	100.0	30.525	100.0
4	Comrades Social Club - William Hill, Entrance to Harrier Way	2.100	40.8	2.875	60.2	13.375	43.8
5	Peacocks - One Clothing, 65 Main Street	4.750	92.2	3.525	73.8	27.275	89.4
6	Jenkins - Mundells, 41 Main Street	2.675	51.9	1.950	40.8	15.325	50.2
7	Park Entrance, 24 Main Street	1.050	20.4	0.950	19.9	6.200	20.3
	Averages	**2.864**	**55.6**	**2.439**	**51.1**	**16.761**	**54.9**

Count Number in 1,000s

4.4 Pedestrian Flows

The survey reveals that footfall has increased significantly over the past seven years, with a peak two-way flow over three days likely to be closer to 15,000 than 10,820. This shows an improvement in vitality from 2003 levels, which is likely to represent an increased viability for stores considering location in the town. The highest estimated flow over the course of a week exceeds 30,000.

This highest flow was recorded between the Town Hall and the derelict Woodsides store on the east side of The Square, with the second highest at the top end of Main Street (89.4%). This is a reversal of the top two locations since 2003.

Given the decline in many of the units to the east side of The Square, it is likely that the high footfall in this location is a result of shoppers parking in The Square or at Asda and walking to units on Main Street. The high footfall to the north end of Main Street is most likely a reflection of the clustering of good quality of convenience, comparison and service units in this location.

This conclusion is supported by the significant reduction in footfall as you move south down Main Street. The count point at 41 Main Street shows a reduction of circa 12,000 people over the course of a week when compared to the footfall to the north of Main Street. This corresponds with a clustering of vacant units, most notably the anchor store vacated by the relocation of Asda. This underlines the importance of attracting a high footfall generator to this vacant unit to anchor the south end of Main Street.

As in 2003, footfall continues to tail-off elsewhere in the town centre. However, in proportion to the higher peak flow in 2010, the footfall remains, broadly speaking, comparable to the 2003 levels. For example, at the entrance to Harrier Way footfall has fallen slightly from 45% of peak flow in 2003 to 43.8% at present. In real terms, this represents a significant rise from 660 to 2,100 on a Friday, but a slight fall from 3,600 to 2,875 on a Saturday.

Similarly, in the north west corner of The Square, footfall has risen slightly from 43% of the peak flow in 2003 to 48.1% at the present time. In real terms, this represents a rise from 1,480 to 2,600 on a Friday, but a slight fall from 1,840 to 1,675 on a Saturday.

It is worth noting at this point that Saturday is still not the busiest day, with a peak flow 4,775 and an average flow 2,864 compared to a peak of 5,150 and an average of 2,439 on a Friday. As with the 2003 Health Check results, this suggests that many local people choose to shop at other major centres on a Saturday. This conclusion is also supported by the outcome of the shopper survey (see Section 6) which indicates the Abbey Centre, Belfast City Centre and Ballymena are often the shopping centre of choice for both food and non-food retail.

By comparison, the footfall at North End has fallen significantly. In 2003, pedestrians at this location represented 53% of the peak flow, which compared favourably to the two count points to the west of The Square. In 2010, the footfall is now at only 32.6% of peak flow, significantly below the pedestrian counts to the west

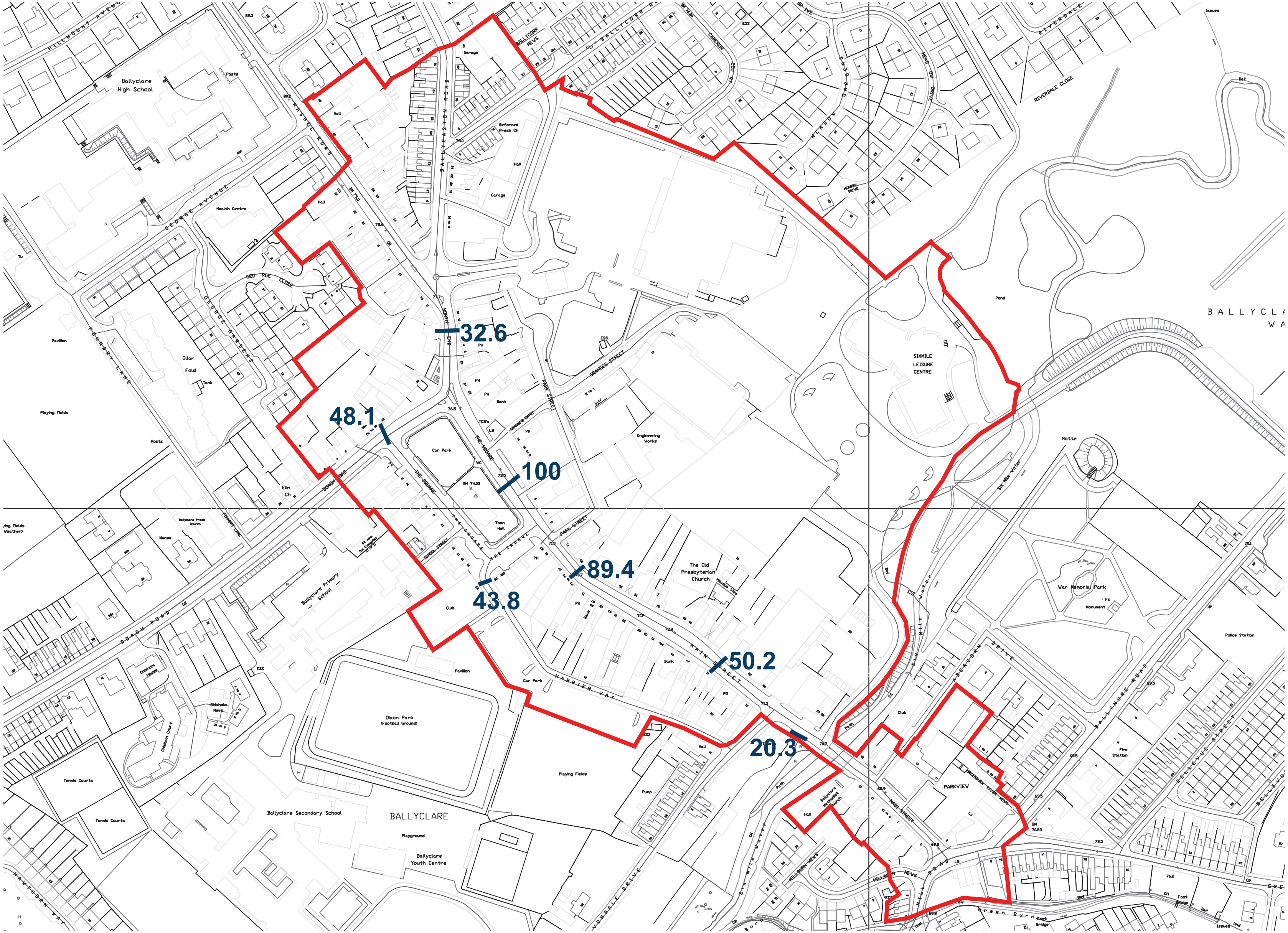


Figure 4.3: Weekly Pedestrian Flows Expressed as a Proportion of Peak Flow (%)

of The Square. As with the lower end of Main Street, this is most likely a result of the cluster of vacant units, particularly on the eastern side of North End. To the North of this point, along Rashee Road and Ballyeaston Road, the majority of units are residential, suggesting a low usage of the town centre by local residents. The remaining commercial units in the North of the town centre are of lower quality, lacking any major footfall generators.

Finally, the lowest pedestrian flow recorded was at the entrance to the park. This is a significant reduction from the 2003 counts, which measured 65% of the peak flow, compared to just 20.3% of peak flow at present. In real terms, this has seen a fall in footfall from 8,020 people per week in 2003 to 6,200 in 2010.

This suggests that the park is a significantly under-utilised resource and reflects the current lack of attraction at this entrance point and poor linkages to the rest of the town centre. However, with improved linkages from the rest of the town centre, the park does represent a significant opportunity to attract footfall to the south end of Main Street.

5. Market Indicators

5.1 Introduction

PPS5 suggests that Prime Rental Values provide a direct indication of retailer desire to locate within an area, which consequently reflects the confidence investors have in the vitality and viability of the centre. This section of the Town Centre Health Check has been prepared by Colliers CRE. It asseses Ballyclare Town Centre from a market perspective and outlines what potential opportunities and threats it faces in the short-medium term.

In the preparation of this study, we have primarily taken cognisance of the findings of the Belfast Metropolitan Area Plan: Retail Sector Study (2003). Key Findings of this included:

- Reducing traffic congestion was deemed to be the most important issue facing the town;
- 87% of retailers were in favour of adding to the net retail floorspace in the town centre to enable new retailers (Dunnes, Marks and Spencers and Next were favourites) to locate in the town;
- There was widespread feeling that the existing positioning of Ballyclare was too downmarket;
- There was a dearth of non-bulky comparison goods floorspace; and
- Vacancy rates were 82% above national averages.

5.2 2003 Town Centre Health Check

Prime retail rents in Ballyclare averaged £242 psm in 2003, up 51% since 1996. Most of this growth occurred between 2001 and 2002. Despite this uplift, rental values in the town remained the lowest within any of the town centres within the Belfast Metropolitan Area, except for Carryduff.

5.3 UK Retail Market Overview

The UK Retail Market is currently undergoing a period of correction. Colliers CRE 2009 Midsummer Retail Report forecasts that rental values will fall by 23% by the end of 2010. The worst economic recession since the 1930s has taken its toll on the retail sector with capital values for some properties falling by up to half.

Retailers have reported “challenging” trading conditions across the board with the notable exception being those at the value or discount end of the spectrum apparently trading much better than those positioned at the middle and higher ends.

2009 and 2010 have witnessed a large number of high profile retailer administrations, the net effect of which has been to increase the rate of voids in UK shopping centres and high streets. Opportunistic discount retailers are taking the opportunity of ever increasing voids to negotiate low rents and large incentives in taking new units.

Landlords appear to have learnt the lesson of the early 1990s, in part forced upon them by the Government’s implementation of full vacant rate payments and are now prepared to keep units occupied almost on any terms. Rent free periods and/or incentives equal to two or three years are common place with extreme examples of five or even six years rent free being accepted. Short term leases on a turnover basis are often being entered into.

The occupancy of a unit helps maintain vibrancy and a feeling of well-being in shopping centres and high streets.

The recession has witnessed the first drop in prime rents since the recession of the early 1990s, when rental values fell for three consecutive years from 1991 by -2.4%, -4.1% and -3.2% respectively, highlighting the comparative severity of the current economic climate and its impact on the retail market.

5.4 Ballyclare Context

Ballyclare enjoys a good strategic location on the Larne line approximately 12 miles from Belfast, 12 miles from Larne and 15 miles from Ballymena. The towns proximity to Belfast and the motorway network (via the M2) has helped consolidate its position as a popular commuter town, a trend which is set to continue with the proposed construction of a large number of new homes in the town.

In retail terms, it is the principal shopping town for the inhabitants of smaller towns and villages throughout the peninsula such as Ballynure, Parkgate, Straid, Doagh, Tildarg, Ballyrobert and Parkgate. Ballyclare's dominance as a retail town within this hinterland is therefore well established which is reflected in the relative size of its Town Centre and its popularity for weekly shopping amongst those based in nearby rural locations.

The perception is that there is considerable leakage to nearby competing retail centres such as Belfast City Centre (15-20 minutes drive time), Larne (again 15 minutes drive time), Newtownabbey (10-15 minutes) and Ballymena (15 minutes drive time) all of which currently are differentiated by a more diverse and comprehensive retail offer.

Ballyclare has a comparatively smaller stock of business units, in the form of offices and warehousing. There is however a considerable number of smaller offices and warehouse units in the town supporting a small number of local business.

From a leisure perspective, Ballyclare town centre whilst accommodating a considerable number of smaller pubs offers little for families and visitors to the area in terms of good quality restaurants and evening entertainment.

5.5 Ballyclare Retail Market

Current Retail Landscape in the Town Centre

Ballyclare has a compact town centre with a large number of surface public car parks making the town centre attractive and accessible for shoppers, if somewhat congested. The Primary Retail Core is centred around Market Square and the north end of Main Street with secondary retailing found on the Southern end of Main Street.

As is discussed in more detail below, the majority of the occupiers in the town centre are primarily low quality smaller independents, banks, estate agents and charity shops which in our opinion fail to generate a sense of place or an attractive shopping environment. These retailers tend to occupy small "lock up shops" in converted terrace buildings. Fit-outs and shop-fronts are generally aging and tired which creates a town centre lacking in quality and in need of comprehensive upgrading and inward investment.

It appears to be an opportune time to re-visit the retail provision in the town, upgrading and adding to it as appropriate. The planned expansion of the town (with the proposed addition of 2,000 new homes) in addition to the popularity of the two schools, combine to provide a positive backdrop to the future prospects of retailing in the town centre.

Retail Rents – Ballyclare

Ballyclare's retail position is illustrated in Figure 5.1 showing retail rents across NI. The established Zone A rent for Prime Retail Units in Ballyclare was c. £25-30 up until mid 2007. This is significantly lower than the 2003 level. Since then there have been relatively few transactions in line with wider market trends. As is the case in the majority of towns across Northern Ireland we would expect to see some reduction in established rental levels in the Town Centre.

Headline rents are likely to remain the same but large incentives packages needed to attract ingoing retailers will almost certainly have led to a fall in net effective rents.

In the future however, this could be viewed as a potential strength of the Town Centre in the event that suitable retail accommodation can be supplied at a relatively lower cost than that which is offered in competing retail centres.

To be competitive, the Town Centre will have to build from a relatively low base in rental terms. It will find it hard to compete with its competitors unless it can provide an alternative lower cost option than that which is offered in the competing alternatives. The key challenge will be in

Figure 5.1: Northern Ireland Retail Rents

Centre	2008
Belfast	265
Belfast - Forestside S.C.	185
Bangor - Bloomfield S.C.	135
Londonderry	115
Newtownards - Ards S.C.	90
Ballymena	90
Belfast - Abbey S.C.	90
Belfast - Connswater S.C.	90
Coleraine	90
Lisburn	90
Newry	90
Enniskillen	75
Bangor Town Centre	60
Newtownards - Town Centre	50
Downpatrick	45
Armagh	40
Larne	35
Ballyclare	**25**
Banbridge	**25**
Magherafelt	**25**

procuring a suitable site to enable the cost base to remain relatively low in order to facilitate lower rentals. The reduction in build costs since 2007 should assist with the viability of any proposed development in the town centre.

Recent Transactions

Recent transactions within the Primary Retail Core have been fairly limited. This is largely due to two reasons. Firstly, the implications of the “credit crunch” and its constraining effect on the expansionary policies of retailers. Secondly, Ballyclare’s relatively small size and its secondary status in terms of retail positioning when considered with neighbouring retail centres, has rendered it relatively less attractive for both multinationals and indigenous retailers alike, in terms of their expansion within the region.

An example of letting activity within the retail core includes:

- The **Original Factory Shop** have agreed to take the former Asda store on Main Street though are not yet trading. The rental reflects a low overall rate of c. £5 per sq ft which is commensurate with a unit of this size, in this location and in the current market.

Colliers have marketed this unit for a considerable period and have had little interest in the unit highlighting difficult trading conditions generally.

Proposed Developments

Our research would suggest that there are no advanced proposals for the town centre in terms of retail development. We have spoken to local property owners and developers who do have plans to redevelop existing properties within the town centre but are not actively pressing forward with their proposals.

The principal coercive influence stalling development is the wider economy and the perceived difficulty of securing finance to fund speculative development projects and then attracting tenants on acceptable terms. Importantly also, the relatively fragmented nature of town centre ownerships makes it apparent that no single developer has a holding of sufficient size to allow them to undertake a sizable retail development. The importance of developing a “critical mass” of retail accommodation is discussed later.

In the absence of joint venture arrangements, it is apparent that the public sector may be able to play a role in facilitating the assembly of a suitable site.

The Local Independent Sector

Ballyclare town centre is known for its good, but limited range of local independent retailers. Some of the better known of these retailers include: **Wardrobe** a well established ladies fashion boutique; **Ashers Bakery**, an established bakery in the centre of the town; **Woodsides**, a Northern Ireland based discount department store with representation in a number of towns across the province; **The Paper Shop**, a locally run Newsagent; and **Ernest Hall**, a suit and suit hire business. **Homestyle Interiors** are another well regarded local independent homewares retailer pitched towards the higher end of the market.

Multinational Retailers

There are few national multinational retailers in the town. Again the town's proximity to other larger retail centres is stressed as a coercive influence in attracting such retailers to the town. One notable exception is **Peacocks**, who reportedly trade well in the town. **Boots** chemist also occupies a unit within the town centre as do **Lidl**, **Card Factory**, **Xtravision** and **Spar**.

Most of the major banks are represented in the town centre including **Ulster Bank**, **Northern Bank**, **Bank of Ireland**, **Nationwide** and **First Trust**.

Semi Chem were represented in the town however have ceased trading reportedly due to poor trade.

The "New" Asda – Its Role as Town Centre Anchor

In what has otherwise been a relatively stagnant retail environment, Ballyclare's new Asda store has been a very significant development within the town centre. Colliers CRE were involved in the site assembly acting on behalf of Asda. Since opening (on 17 March 2008) the store has proved to be a resounding success, emphasising if nothing else, that the customers are there and will visit the town centre for a good retail offer.

Notably, despite the town's smaller size, Asda decided to open its larger town format incorporating both a George (fashion) and a homewares offer. This was due to the perceived lack of competition in the town for both types of product. We understand that both perform well.

Asda is now an important anchor to the town centre and is proving to be a considerable draw to it. The wider question of its positive effects on the rest of the town centre is less clear. Shoppers and local retailers typically assert that most shoppers park in the Asda car park, do their food-shopping, then leave without venturing onto the Main Street.

A number of observations emerge. Firstly, it appears that there is little in the town centre otherwise to draw shoppers into the established primary retail core from the Asda car park. The Asda appears to be providing its vital anchor function in drawing shoppers to the town, but the town is not capitalising on this in terms of deriving additional spend. It is suggested that a better "link through" from the Asda store to the top of Main Street could be instrumental in providing a much needed link between it and the established retail core.

Second, it is suggested that there is a degree of physical separation between the Asda store and the Main Street. Again an attractive "link through" streetscape which more directly linked the Asda store to the top of Market Square / Main Street could be instrumental in providing a link to the existing retail core and facilitating additional shopping in the town. It is proposed that this link through would best take the form of a retail parade or streetscape.

The town centre is also anchored by **Woodsides / Supervalu** a locally owned department store who trade in a number of similar towns across Northern Ireland. Again, the extent to which Woodsides "feeds" the rest of the town centre is questionable. Its location beside the Asda store seems to be physically disjointed from the town in the absence of an amenable link through to the Main Street.

Further, the store almost seems to have its frontage at the rear of the shop (facing away from the town centre) which further serves to negatively impact its integration with the rest of the Main Street.

5.6 Competing Retail Centres – Potential Leakage

Ballyclare's market town status and relatively large catchment population is an obvious strength from a retail perspective however its proximity to competing retail centres is, by implication a threat. The principal competition can be listed as follows:

Belfast City Centre

The City Centre has been somewhat rejuvenated from a retail and leisure perspective with the opening of Victoria Square Shopping Centre. This scheme is Northern Ireland's largest shopping centre. It provides a number of points of difference relative to regional towns. Its strong retail offer (House of Fraser, Build a Bear, Tom Tailor, LK Bennett for example) complemented by a strong restaurant offer (Nandos, Pizza Express, TGI Fridays) provide the rationale for shoppers to visit. The majority of the schemes Tenants are not represented elsewhere in Northern Ireland.

Abbey Centre, Newtownabbey

The Abbey Centre is within a 15 minute drive time from Ballyclare. The scheme is anchored by Dunnes, River Island, Next and others in addition to a Marks and Spencers and Tescos in the adjacent retail parks further serves to strengthen its appeal.

There are a large number of multinational retailers in Abbey Centre and the surrounding retail park who are not represented in Ballyclare.

Ballymena

Ballymena is within a 15 minute drive time of Ballyclare. The town centre is anchored by two shopping centres, the Fairhill Shopping Centre and the Tower Centre. Between the two schemes, most of the larger UK multinational brands have representation.

A large Sainsburys on the edge of town is also anecdotally reported to be popular with Ballyclare residents.

Larne

Larne is located within a 10-15 minute drive time of Ballyclare. As such, the towns directly compete with one another for the attentions of shoppers, predominantly those who live between them.

It is thought that Ballyclare's Asda store is currently drawing from Larne and surrounding areas in the absence of a similar foodstore in Larne. This is set to change however. Larne is to get its own new Asda store with a provisional opening date of Monday, June 7 2010.

Like Ballyclare, Larne otherwise has experienced a fairly stagnant retail environment in recent years. The development of the Laharna Retail Park in 2004 is however a good example of how Larne has sought to address the problem of having insufficient units of modern Grade A size and specification. Such units are now provided in Laharna and occupied by Argos, New Look, Peacocks, Menarys, M&Co, Going Places, Lidl, B+M Bargains, Carphone Warehouse, 02 and The Streat.

Given such competition, the need to upgrade and improve the shopping experience in the town centre is stressed if Ballyclare is to assert its position amongst the strong opportunity set of competing alternatives.

Junction 1

Junction 1 Outlet Village and Retail Park whilst not itself a traditional town centre will attract retail spend from Ballyclare. Indeed, this is not unusual and its status as Outlet village means that it is designed to attract custom from across Northern Ireland. However, given its range of good coffee shops, fashion outlets and well landscaped surroundings, it does act as a competitor to Ballyclare Town Centre.

Further, as mentioned above the Asda in Ballyclare is a considerable draw to the town centre and currently a source of competitive advantage. However, a new Asda store is under construction at Junction 1 in Antrim. This in addition to the new store in Larne is perceived to be of detriment to the important role that the Asda currently plays in the town centre. The importance therefore of upgrading and improving the retail offer to compensate for this is stressed.

5.7 Future Retail Strategy

Multinational Retailers

Multinationals who may be attracted to Ballyclare

In our opinion for a town of the size of Ballyclare, the multinational sector is underrepresented. This should not be overstated however. Ballyclare simply does not offer the catchment to be considered by the large majority of multinational brands (in particular, many of the fashion retailers) but there are, in our opinion a limited number who would consider the town if an appropriate retailing environment could be provided. Retailers with whom we have visited the town have typically been enthused by the amount of schoolchildren in the town centre and this is a key attractor to them.

Large multinational dominated shopping destinations are characterized by “critical mass”, that is a large number complementary retailers which together attract a diverse range of shoppers.

These retailers are listed below. Some of them are well known “footfall drivers” and would certainly be of benefit to the town centre, not only in terms of attracting shoppers but also in helping to improve the character of and “feel” within the retail core.

- New Look – 5,000 sq ft
- Argos – 7,000 sq ft
- M&Co – 7,000 sq ft
- B&M Bargains – 7,000 sq ft
- Poundstretcher – 5,000 sq ft
- Home Bargains – 6,000 sq ft
- Poundland – 5,000 sq ft
- Poundworld – 4,000 sq ft
- Semi-Chem (were in the town but vacated – could possibly be attracted back to occupy a unit within a suitable scheme) – 2,000 sq ft

- Savers / Superdrug – 3,000 sq ft
- Holland and Barrett – 1,500 sq ft

To some extent, this list reflects the current economic climate and the fact that those retailers who are currently acquisitive tend to be towards the value end of the spectrum. Attracting such retailers to the town potentially conflicts with our later recommendations that Ballyclare should seek to accommodate higher end boutique retailers.

By way of further explanation, we believe that Ballyclare can and should offer both. Perhaps a zone towards the northern end of Main Street (close to the Asda perhaps as part of a link through onto Main Street) could allow for the development of a suitable scheme to attract the limited range of "target" multinational retailers. The southern end of Main Street would therefore cater for the boutiques.

It is also worth noting that some of the names in this list are unlikely to be particularly well received by some town centre stakeholders. Pound shops and discount chains are widely regarded as anathema to improving town centres. In this it is stressed that Poundland and Poundworld are a world apart from locally run fixed price retailers. Rather, they invest heavily in attractive fit-outs and merchandising. These retailers are proven footfall generators and attractors to town centres and shopping centres alike.

Crucially however, multinational retailers will not be attracted to the town on a piecemeal or one by one basis. They will only come to a new development of sufficient critical mass and which promotes a tenant mix that will draw a wide range of customers. We would suggest that any new retail provision would comprise at least 7-8 new appropriately sized retail units such that the above named retailers can take comfort from knowing that other good complementary retailers can be accommodated alongside them. As mentioned elsewhere in this report, the development of Laharna Retail Park is a good example of how a new scheme can attract a range of multinational retailers hitherto not represented in the town.

It is suggested that the town does not however meet the size and specification requirements of typical multinational retailers, as such, legitimising a role for the development of suitable accommodation in the town.

Size and specification requirements of Multinational Retailers

In general terms, the size and specification requirements of such retailers are discussed below:

- Units ranging from 2,500 – 10,000 sq ft.
- Regular shaped units without steps / ramps or other changes in level at ground floor level.
- Minimum frontage: 6 metres (8-10 metres for larger units).
- Floor to ceiling shop fascias for display.
- 3 Phase electricity supply.
- Goods lifts / Amenity Block / Disabled W.C's / Screeded floors.
- Rear service access and servicing areas.

The potential to create a critical mass of well specified larger units in competing retail centres (Abbey Centre, Ballymena and so on) is in contrast to a lack of “fit for purpose” retail units in the town centre and in our view, largely accounts for the dearth of the UK multinational retailers who would consider the town (mentioned above).

Retailers increasingly demand large box retail with ground floor floor-plates of between 2,500 sq ft and 10,000 sq ft. The existing building stock in the Primary Retail Core could broadly be described as aging converted terrace buildings which do not adequately meet the needs of modern retailers.

Those Multinationals who are unlikely to come
In the interests of properly informing retail policy direction it is believed worthwhile to consider those retailers who are deemed unlikely to pursue the town of Ballyclare in their expansion plans. In this, it is noted that discussions with residents and local retailers concerning what might benefit the town centre usually results in the same large anchor stores being mentioned.

For the avoidance of doubt therefore, whilst the following retailers would undoubtedly benefit the town, it is unlikely that they would consider opening a store there:

- Marks and Spencers
- Primark
- Dunnes
- Zara
- H&M Hennes
- Debenhams
- Next
- Arcadia brands (Top Shop / Dorothy Perkins / Burtons / Principles etc)

It is possible that Marks and Spencers (whilst not currently acquisitive) may consider the town for its smaller Simply Food format within the masterplan timeframe.

It follows therefore that it will prove very difficult for Ballyclare to try to compete with the Abbey Centre, Ballymena and Belfast City Centre in seeking to offer a comparable multinational dominated tenant “line up”. Rather Ballyclare will need to compete on providing a point of difference, satisfying latent demand for goods and services not currently provided in any of the competing centres. Increasing the provision of niche / boutique stores is suggested as one way of achieving this and is considered in more detail below.

Northern Ireland Based Independent Retailers
There are also a number of indigenous Northern Irish retailers who we believe would consider the town including:

- Hanna and Browne
- SD Kells
- Menarys / Tempest
- Houstons

The lack of a town centre anchor at the southern end of Main Street is an important consideration. If a suitable site could be identified with sufficient car parking towards this lower end of Main Street, a dumbbell effect could be created, with Asda at one end (north) and another anchor at the other (south) with positive implications for those trading in between. It may be possible to anchor the southern end of Main Street with one of the above named local independent retailers.

We have undertaken some research into these retailers and their intentions regarding Ballyclare. The following summarises their position:

Hanna and Browne

Hanna and Browne are a well established Northern Ireland based cookware and homeware retailer and are represented in a number of towns across Northern Ireland. We believe that they would consider a presence in Ballyclare as part of a comprehensive improvement of the primary retail core. However they would ideally like to purchase and occupy a larger unit within the town centre.

Menarys / Tempest

Menarys / Tempest are a local fashion retailer with outlets in larger towns across Northern Ireland.

Tempest are an obvious target for the town, in that they provide a range of concessions under one roof of larger retail brands who could not justify having a standalone store in the town.

Brands include La Senza, Warehouse, Oasis and Wallis, none of which retailers would consider a store in the town but might well consider opening a concession.

Upon speaking to this retailer it was clear that there was concern over the lack of good adjacencies and complementary retailers or a critical mass of fashion boutiques. Of importance is that they would consider opening a store if there were more such complementary retailers.

We have spoken to a number of well regarded local independent retailers across the province. Whilst the ongoing recession has quelled their enthusiasm for new stores generally, most have a fairly positive view of trading in Ballyclare and could potentially be attracted to the right development.

SD Kells

S D Kells is a well known department store with a longstanding reputation in ladies fashion, menswear, children’s wear, bedding and household as well as wedding gifts and formal hire wear.

S D Kells trade across Northern Ireland.

We believe that this retailer trades well in Banbridge which is a comparable town to Ballyclare. AS such, we believe that they could be attracted to the town as part of a comprehensive upgrading of the retail offer

Houstons

Houstons is a department store trading from Banbridge, Ballymena, Downpatrick and Lurgan. We believe that they could be attracted to the town if the right retail environment could be provided.

Tenure

Whilst a number of the retailers detailed above are likely to be interested in Ballyclare, it is likely that their interest will only be on the basis that they can purchase the freehold interest in the unit which they occupy. This is particularly true of family businesses and the local larger department type stores who we find to be particularly averse to renting premises.

It follows that there is likely to be interest amongst Northern Ireland's indigenous retailers for new retail space in Ballyclare. If anchor independent retailers can be secured but who will only agree to enter the Ballyclare market if they can purchase their unit, then this should be facilitated where possible. It may be that a developer would be unwilling to compromise on this and require that all units are leased. In our opinion, this will significantly reduce the potential occupiers list, to the detriment of the potential vitality of the Town Centre.

Attracting Higher End Retailers and Fashion Boutiques – Providing the Right Environment

Boutique shops often trade from converted terraces and smaller high street shops. They have a typical ground floor square footage requirement of 750 sq ft – 1,000 sq ft. Aging buildings often exhibit characteristics (high ceilings and period features) which often complement the fit out of the boutique trader. All of which is to say that it is likely that refurbishing the existing properties to the south end of Main Street would be sufficient to satisfy the property needs of these potential occupiers.

Crucially however, there are a further number of characteristics which appear to be missing from Main Street which would otherwise help to attract these retailers. The first is attractive, ornate or period shopfronts. These help to elevate the "feel" within town centre streetscapes making the town visually more attractive and therefore more appealing to visit. There is perhaps a role for the public sector here in co-ordinating the upgrading of existing to boutique style shop-fronts.

The second is an attractive streetscape. Public realm works such as paving, seating and artistic commissions can help to create the "boutique" feel, setting the scene for stylish retail environments where more affluent customers want to visit. An example where this works very well is The Linen Green, Moygashel in Dungannon, which is a tourist attraction in its own right. The recent upgrading of Market Square and Main Street are a definite step in the right direction towards promoting a boutique feel.

Thirdly is the need for a strong catering offer. Good coffee shops and restaurants are seen as synonymous with fashionable retail areas. This need not necessarily be a multinational chain. Rather, it is more likely to be locally run, but of a higher calibre than that which is currently on offer. The presence of good quality butchers / bakeries and delicatessens again are hallmarks of successful niche retailing environments.

Finally, is a focal point for children. Whether this in the form of a children's play facility (privately run or otherwise) or a catering offer specifically aimed at children, a feature of successful niche retailing areas is that they cater for children as well as adults.

“Bulky Goods” Retail Warehousing

In recent years there has been strong demand from retailers for modern well configured retail warehousing in schemes across Northern Ireland. Given this trend, it is notable that there is a dearth of a good retail warehouse or “bulky goods” scheme in Ballyclare. The towns close proximity to Belfast may account for the lack of such development. There is a considerable offer in nearby Newtownabbey perhaps accounting for the lack of such developments in the town.

Whilst we would not advocate “bulky goods” retailing the town centre, one reason accounting for leakage in retail spend to competing retail centres is the lack of “out of town” retail parks in Ballyclare and the existence of such parks in competing centres. These easily accessible parks have become key attractors for car borne shoppers.

At the current time, we do not envisage there being a sufficient level of demand to justify the development of an out of town retail warehouse scheme. It is possible however that such retailer demand will emerge during the course of the masterplan timeframe to legitimise a small scale development.

As opposed to competing with the town centre, these parks are important attractors to the town and together with a vibrant town centre will help to promote a sense of both destination and place.

5.8 Ballyclare Office Market

Notwithstanding a few larger office buildings typically occupied by Public Sector bodies, the office market in the town would be characterized by a relatively large number of smaller offices in converted terrace buildings located at the edges of the retail core along Main Street and Market Square. These tend to be either owner occupied or rented space in small office buildings or above retail or commercial space. Typical occupiers include solicitors, accountants and other similar small consultancy practices.

The town centre office market in Ballyclare is unlikely to witness major change in the short to medium term. We are not aware of any substantial current or imminent public or private sector requirements. Following from this, speculative development of large offices in the town centre is deemed unlikely and inefficacious from a viability perspective.

From a master-planning perspective in the wider provincial market place, demand for new build offices while limited is focused on small pavilion style own door office units of 1,500 – 2,000 sq ft with associated parking on the edge of town. Take-up of this type of scheme has been particularly good but generally only from a freehold perspective where local companies have been able to acquire buildings for placement within their own pension funds. The viability of such a scheme in Ballyclare is deemed to be marginal – we do not believe that demand is such that it would legitimise development in excess of a total of 8,000 – 10,000 sq ft for this use.

5.9 Leisure and Tourism

The Leisure and Tourism market in Northern Ireland is undergoing significant expansion with year on year increases in visitor numbers to the province over the past number of years.

The Executive's Programme for Government has set Northern Ireland tourism challenging targets over the next three years. These include increasing visitor numbers from 1.98million to 2.5million by 2011, and growing tourism revenue from £370 million to £520 million.

It is widely acknowledged that Northern Ireland is rich in natural beauty with widespread areas of special interest. Ballyclare could benefit from increased tourist numbers and seek to capitalise on increased tourist revenue over the coming years. In this, its proximity to the Port of Larne, the International Airport and the Glens of Antrim are stressed as potentially positive influences on the town's future ability to attract tourist spend.

The Leisure Centre

The Leisure Centre is viewed locally as an excellent resource and is seen as an important attractor to the town centre. The facility comprises a swimming pool suitable for both adults and children and a comprehensive gym facility which was comprehensively refurbished in February 2009. It also has a large sports hall which accommodates activities such as children's summer schemes, 5-a-side football and evening fitness classes.

The nearest comparable facility is offered at Valley Leisure centre. Therefore the Leisure Centre offers an important point of difference for Ballyclare Town Centre with its modern facilities providing a comprehensive regional draw.

The facility is not particularly well integrated with the town centre and "feels" physically disjointed from it, despite there being a number of pedestrian links. It is suggested that these links could be improved. The Leisure Centre is not obviously accessible when approaching particularly from the north of the town and initiatives such as better signage and clearer vehicular access may be of benefit.

The role of the Leisure Centre as Leisure anchor to the town centre is however stressed. It already provides an important focal point for the town centre and is a key reason for people to visit the town centre outside of normal business hours.

Existing Hotels / Restaurants / Pubs and Clubs

There are a considerable number of pubs / bars in Ballyclare town centre. For the large part, these are considered to be more traditional drinking establishments and not particularly amenable to families and young people.

The Sportsman, The Grange and The Comrades (Social Club) are probably the best known of the town centre bars. In terms of restaurants, there are no particularly well known town centre restaurants. Within the immediate area, Barnabies, Oregano (both in Ballyrobert) and bamboo (edge of town centre) are well thought of locally. However, the absence of a good town centre offer is of obvious detriment to both the shopping experience and the evening economy.

Other than this, there is a proliferation of relatively low quality fast food outlets in the town centre. These offer little to boosting dwell times within the primary retail core and contributing to the feel within the town centre.

Addressing this and seeking to attract high quality restaurant and bar operators should be a key priority of the masterplan.

5.10 Future Leisure Market

In terms of bolstering the existing Leisure offer, the following potential uses should be investigated and promoted where possible:

Hotel

There are no active requirements in the town at present from the national hotel chains or local hotel operators. The hotel sector is currently undergoing a period of consolidation. Over the course of the masterplan, there is perhaps scope for a new hotel in the town, most likely a purpose built facility. This is unlikely to be within the town centre but would be a good attractor to the town in general. This should be facilitated where possible in increasing the number of visitors to the town, and of raising its profile as a leisure destination.

Children's Indoor Play Park

These are proving to be very popular and a number of national chains have now entered the province. They are proving to be a considerable attraction and in the case of Ballyclare, this type of provision would be an obvious way of attracting young families to the area. As mentioned, this kind of offer complements very well the provision of boutique / niche retailing. The typical requirement is for 3,000 – 5,000 sq ft.

Restaurant / Cafés

A strong Catering offer has never been more important in "creating places" and bolstering both the retail and night time economies. This is conspicuous by its absence in Ballyclare town centre and is stressed as an important facet not only to the daytime shopping experience but also to promoting an evening economy.

Drive thru

Whilst seemingly at odds with seeking to reduce the level of traffic and congestion in the town centre, it is nonetheless true that Drive Thru's are a key attraction to town centres amongst young families and young people alike. If a suitable opportunity site could be identified which was deemed to be of only negligible further detriment to the towns traffic congestion problems, we believe that this would be a viable use with the following parties being potentially interested. A unit of 2,500 sq ft would be required with an adequate external circulation area.

- KFC
- Supermacs
- McDonalds

5.11 The Town Centre Residential Market

Town centre living is of obvious benefit to improving the vitality of the town centre. Whilst we believe that there would be limited demand for new build apartments and townhouses (given the fall in property values across NI and the relative affordability of traditional housing) we do however believe that some of the typically run down terrace buildings on the edge of the town centre could be refurbished to provide attractive town centre residential accommodation.

These buildings are typically former residential terraces which have since been converted into retail use and subsequently have become vacant and disused. As such, they provide an unattractive and uninviting entrance to the town centre.

We are cognizant of the impending increase in out of town centre residential stock in the form of the proposed 2,000 new homes to be constructed on the new relief road. However, it is likely that this type of housing will appeal more to young families and older people and less so to younger professionals. It is proposed that the latter would prefer to live in the town centre (assuming a rejuvenated retail and leisure sector) and the significant number of run down buildings on the edge of the town centre could, once refurbished, provide an ideal location for such people.

Moreover, there may be added scope to convert some of this stock into social housing or managed accommodation for the elderly. Improving and upgrading not least the façade of these properties which currently provide an unattractive gateway to the town centre should be a key consideration for town centre stakeholders.

5.12 The Importance of Public Realm

Shopping has become more of a leisure activity. Customers increasingly demand shopping environments that are attractive and pleasant. Successful retailing has become about customers having an authentic experience. Increasing footfall and dwell times accounts for why so much effort is put into creating attractive destinations where people want to visit.

All of which is to say that any future town centre scheme should be designed around significant public realm. The provision of high quality paving, sculptures, seating and street lighting (like that which has just been undertaken on Market Square and Main Street) in any proposed additional development would have very significant implications for the attractiveness of the town centre for visitors and shoppers alike.

As part of any public realm improvements, good signage provisions should signpost the main features / attractions in the town. There should also be clear and accessible linkages within the town centre such that it is an accessible, easily navigated and attractive place.

5.13 Vision

Ballyclare is a good town and has many positives. The town's location within a densely populated hinterland is perhaps its greatest asset accounting for why it has remained one of Northern Ireland's better market towns over the last few years.

The vitality and viability of the Town Centre is however currently under threat amidst traffic congestion and a stagnation in new retail development to provide high quality retail floorspace which the modern retailer demands. Ballyclare “shares” its catchment with a number of other good quality retail destinations so the need to upgrade, improve and create a point of difference is clear.

At the heart of our vision for Ballyclare Town Centre is a rejuvenated and comprehensive retail offer incorporating the following:

1. A limited number of new multinational retailers.
2. Complementary local retailers / department stores
3. Boutique / niche retailers specialising in higher end fashions, homewares and giftware.
4. An enhanced catering offer incorporating an increased range of goof quality bars and restaurants.

We would envisage that this would be complemented by other footfall drivers befitting a market town of its stature. For example, a regular farmers market tied into the existing variety market could become an important draw to the Town Centre if a suitable site could be identified. We believe that this has already been initiated on the town hall site on a small scale. Initiatives such as this will create a point of difference between Ballyclare and nearby competing retail centres.

6. Customer / Shopper Views

6.1 Introduction

PPS5 requires that customer surveys be carried out as part of a Town Centre Health Check to assist in monitoring and to assess the effectiveness of town centre improvements and in setting priorities. It suggests that interviews in the town centre and at home should be used to establish views of both user and non-users of the centre, which may establish the degree of linked trips or multi-trips.

As a secondary outcome, a customer survey also confirms the extent of the catchment / study area, with the questionnaire including details of the origin, purpose, frequency, other shopping destinations, likes and dislikes, perceptions, etc. of the main centre visited for non-food shopping.

6.2 2003 Town Centre Health Check

Not surprisingly for a small town centre, almost nine out ten people visiting Ballyclare in 2003 did so to shop. An identical proportion travelled from home. Less than 20% of visitors shopped for two hours or more, again reflecting the limited scale of the retail offer.

Sales were most readily converted for convenience and incidental items (eg. food and chemists goods) and catering, whilst comparison goods achieved a relatively low conversion rates. This finding of the 2003 ‘Health Check’ reflected the pattern of expenditure flows recorded for the wider Belfast Metropolitan Area and the considerable leakage of non-bulky and bulky comparison goods expenditure from the local area. In fact, only 9% of shoppers interviewed in Ballyclare actually used the town as their main centre for non-food shopping; 39% chose Belfast City Centre, 22% the Abbey Centre and 18% Ballymena.

The average expenditure per trip in Ballyclare town centre was £38, of which virtually all was spent on food to take home. This reflected the important role of food retailing in anchoring the town centre, a fact borne out by the shoppers choice of Safeway, Woodsides and Bairds as Ballyclare’s most important stores in 2003. As a result, Marks & Spencer, Dunnes Stores and Iceland were the shops which shoppers would have most like to see represented in the town centre.

The majority of shoppers surveyed in 2003 felt that there were not enough large shops in the town centre, whilst the same number consider edthe centre too compact / congested. In addition, a significant minority thought the retail offer was too cheap / down market. ‘Nice’, ‘easy to get to’ and ‘scruffy’ were the three phrases that most commonly described Ballyclare town centre, whilst leisure facilities were rated as being adequate, except for the cinema, nightclubs / discos, and restaurants. Theatre / concert halls also scored badly, but the report noted that a small town would not be expected to offer such facilities.

Looking to the future, a greater choice and quality of shops were singled out by shoppers as the improvements which they would most like to see, whilst better public toilets, security and less traffic pollution also rated as important.

6.3 Methodology

Consumer views were ascertained through a combination of two separate surveys, which were conducted as follows.

The Household Survey

The household telephone survey allows us to determine:

- Town centre and local catchment areas for convenience goods and non-bulky and bulky comparison goods shopping;
- The levels and pattern of consumer expenditure, retention and leakage;
- Estimates of the retail turnover in Ballyclare Town Centre; and
- Consumer attitudes towards the centre.

The household survey area follows the area surveyed as part of the previous 'health check' completed in 2003 to allow for direct comparisons and was agreed with the Depatrment of Social Development prior to the fieldwork. It is shown in Figure 3.1 and the sample size for each of the survey zones is outlined in Figure 3.2.

A total of XXX interviews were conducted over a period of XXX weeks, between XX February and XX March 2010.

Shoppers Survey

In order to ensure that the 'health check' is as comprehensive and robust as possible, street surveys of shoppers in Ballyclare town centre have been undertaken. Interviews were conducted face to face, using a structured questionnaire.

Interviewing locations were selected in order to try and to ensure that shoppers would have completed their shopping prior to their interview. This approach yields data on actual shopper expenditure etc, rather than just buying intentions. The table below details the location, date and number of interviews undertaken. Overall we undertook XX shopper interviews. Interviews were undertaken between 10am-4pm each day.

6.4 Telephone Survey

XXX

6.5 Shoppers Survey

Retail

Retail ('Shopping for goods') was the main reason stated for visiting Ballyclare (44%)

Main items to be bought - "food to take home" 84.1%, "Chemist Goods" 15.9%. Reflects importance of Asda and Boots to Town Centre.

Items actually purchased - "food to take home" 86.4%, "Chemist Goods" 31.8%. Also 13.6% stated "leisure services". Linked trips?

Main centre for non-food shopping - 10% Ballyclare, 38% Abbey Centre, 29% Belfast City Centre, 11% Ballymena.

Why choose as main non-food centre? "close to home / convenient / easy to get to" 37%, "good choice / variety of stores" 75%

Normally purchase:

- food to take home - 55.6% this town centre
- clothing and footware - 79.8% somewhere else
- bulky goods - 60.6% somewhere else, 22.2% don't buy

Main centre for food to take home - Abbey Centre 28.1%, Carrickfergus 25%, Belfast City Centre 12.5%. 0 for Ballyclare!!?

Main centre for clothing and footware - Abbey Centre 44.3%, Belfast CC 30.7%. 0 for Ballyclare!!

Main centre for bulky goods - Abbey Centre 56.3%, Ballymena 12.8%, Belfast 9.4%. 0 for Ballyclare!!

Main centre for other goods - Abbey Centre 63%, Belfast CC 21.9%. 0 for Ballyclare!!

How would you describe the shopping in this town centre? About right 32.3%, too many small shops / not enough large stores 61.6%

How do they rate the shops - "Fine as they are" 55.6%, "Too posh / upmarket" 20.2%, "Too cheap / downmarket" 22.2%

Important shops:
Asda 70.7%, Boots 31.3% Woodsides 15.2%, Butchers 14.1%, Pots of Pleasure / Cafe - 12.1%

Like to see:
37.4% "None / Don't know / No reply", Marks and Spencer 24.2%, "New Look / Dorothy Perkins / H&M / River Island / Top Shop" 13.1%

Leisure Services

Town Centre also plays an important role as a meeting place, with 21% of visitors to the town centre 'meeting with friends or relatives'

Describe Sports and Leisure facilities?
71.7% Quite Adequate

Describe entertainment facilities?
49.5% Quite inadequate, 47.5% Totally inadequate

Describe catering facilities?
51.5% Quite inadequate, 42.4% quite adequate

Expenditure

Average spend (on that day):
food - £18.58
non-food - £9.99
bulky goods - £0.05
catering - £3.88
other - £3.41
total - £35.55

Travel

frequency of visit to Ballyclare - 49.5% "2-3 times a week", 21.2% "once a week"

Origin of journey - Home 64.6%, 13.1% Work, 14.1% shopping elsewhere

length of journey - average = 1.79 miles, 16.79 minutes

Mode of transport - 44.4% car driver, 23.2% car passenger, 31.3% walk. None said bus!!

length of visit - average = 62.58 mins, 33.3% “30 mins - 1 hour”, 23.2% “1 hour - 1hour 30 mins, 21.2% “less than 30 mins”

User Perceptions

How would you describe the layout of the town - 62.6% “too spread out / distances between shops are too big”

Your opinion of Ballyclare? “Scruffy” 31.3%, “Easy to get to” 28.3% “OK / Nice” 22.2%

Which other facilities most need improving?
- Make the centre more attractive - 78.8%
- Less traffic congestion - 72.7%
- More / better parking facilities -56.6%
- Wider choice / variety of shops - 52.5%
- More street entertainment / more things going on - 52.2%
- More pedestrianisation - 44.4%
- Better quality stores / goods - 23.2%
- More / better places to eat or drink - 20.2%

most important improvement?
- Less traffic congestion - 26.3%
- Wider choice / variety of shops - 24.2%
- Make the centre more attractive - 23.2%

Facilities not currently available that you would like to see provided? 77.8% - None / Don’t know / No reply, next highest “more / better entertainment for all ages” (5.1%)

7. Retailer Views

7.1 Introduction

PPS5 suggests that retailer views, alongside the views collected from customers / shoppers will assist in monitoring the effectiveness of town centre improvements and in setting priorities.

A detailed knowledge of occupiers is vital in making any reasoned assessment about the existing and future health of a town centre; for example, the productivity of current floor space and the potential for existing stores to soak up some of the growth in consumer expenditure (more spending doesn't always equate to a need for more retail floor space).

The retailer survey also produces hard data on recent, present and future retail trading performance (i.e. changing retail sales and profits in the form of an index), the extent of investment in staff, premises and merchandise and intentions to relocate or close down.

7.2 2003 Town Centre Health Check

According to the 2003 survey, Ballyclare had proportionately the fewest shops occupied by national multiples of any town centre studied as part of the Belfast Metropolitan Area Plan (BMAP). However, many of those that did trade had been established for a long time; 65% for six years or more compared to only 52% for the BMAP centres as a whole.

The proportion of retailers which, over the past 12 months, have refurbished their premises and extended their store and product range exceeded the BMAP average on all these counts. In addition, relatively few retailers had experienced higher than anticipated staff turnover or had to improve conditions of employment, although 16% had to increase wages more than expected. Plans to refurbish, extend salespace, increase the product range and employ more staff were generally in line with the BMAP average.

On average, retailers had achieved sales growth of 3% over the previous 12 months, with the convenience sector doing best (up 5%). Store profitability, however, fell by 3% overall, with the comparison goods sector doing particularly badly with a 7% fall. More than one in 10 retailers responding to the 2003 survey expected to cease trading over the following 12 months, the second highest proportion of any BMAP centre.

However, retailers were generally optimistic about the future, with 42% expecting their sales to increase and just 18% expecting their turnover to decline.

Town centre retailers were generally happy with the pitch of their shop and standard of accommodation. However, there was a lot of dissatisfaction with Ballyclare's retail offer and layout. The majority felt that the town's market position was 'too downmarket' and that there were not enough large stores. Most also felt the town was too congested and more than nine in 10 retailers considered the number of vacant units unacceptable (the highest proportion of any BMAP centre), although most felt that the number of service businesses is about right.

The generally negative perception towards Ballyclare as a retail location was summarised by the fact that 71% of retailers felt the trading performance of the town had declined over the five years to 2003 (the highest proportion of any BMAP centre). Moreover, retailers gave Ballyclare negative scores against all of 13 performance criteria identified as part of the survey, with traffic congestion performing worst. Furthermore, the town centre was deemed to be getting worse in respect of all of the criteria except entertainment / leisure facilities. This reflected the opening of the new leisure centre on the edge of the town centre .

Retailers consider the two principal anchor stores in the town to be Safeway and Woodsides, whilst Marks & Spencer, Next and Dunnes Stores were singled out as those stores which they would most like to see represented in the town.

Looking ahead, retailers considered the need to reduce traffic congestion the most important issue facing the town. Some 87% of retailers were in favour of adding to the amount of retail floorspace in the town centre to enable new retailers to locate in the centre.

7.3 Methodology

Professional interviewers visited a sample of XX retail shops in Ballyclare town centre. The interviewers asked to speak with the shop 'manager' or 'owner' (if unavailable they called back) and explained the survey to them, arranging a date for the interviewers to return and collect the completed questionnaire. The questionnaire was accompanied by a covering letter from the Department of Social Development and Newtownabbey Borough Council.

Questionnaires were delivered during the week beginning XX February 2010 and collected during the week XX February 2010. Where a form was not properly completed, the interviewer offered to sit down and run through it with them.

Overall, we achieved positive responses from XX stores, representing a response rate of X%. We are grateful for the help given to us by consultees in encouraging traders to respond to our survey (eg. Chamber of Trade etc.).

7.4 Retailer Survey

XXX

8. Urban Design Appraisal

8.1 Introduction

The environmental quality and physical structure of a Town centre is measured via an urban design appraisal of the centre. In accordance with PPS5, this indicator assesses:

- The physical condition of the town, including street clutter, litter and graffiti; and
- The environment attributes, including the quality of shop fronts, landscaping and open spaces).

Further to this, the full urban design appraisal considers the entire built environment, including landmarks and quality buildings, the public realm, sense of arrival and place, orientation within the centre and signs of urban decay and neglect, etc. The design of the centre has also been considered in relation to crime, opportunities for surveillance, etc.

8.2 2003 Town Centre Health Check

In 2003, a number of recent public realm improvements had been made to Ballyclare town centre, many involving modest natural resources. Nevertheless, throughout the town, the environment was 'hard', with little greenery.

The only significant public open space in the town centre was, and still is, provided by the environs of the attractive town hall in Market Square. Unfortunately, this public open space is dominated by traffic; half of the square is used as a public car park whilst there are heavy traffic flows around it, notably along Main Street and Doagh Road.

Reflecting the quality of the environment, it was perhaps not surprising that 53% of shoppers wanted to see the town centre made more attractive and 51% wanted to see measures taken to improve cleanliness in the centre. Overall, only 2% of shoppers described the town centre as 'attractive', whilst retailers considered the environment to be even worse; 47% described the town as 'scruffy', perhaps exemplified by the northern end of town, which was blighted by a large number of voids.

8.3 XXX

XXX

9. Summary and Conclusions

9.1 Introduction

Each of the PPS5 indicators outlined in this Town Centre Health check can be brought together to present an overall picture of the vitality and viability of Ballyclare Town Centre. This in turn can then inform a ‘SWOT Analysis’, considering the relative strengths and weaknesses of the Town Centre, the opportunities to improve the overall vitality and viability of the centre and the factors that could threaten the success of improvements.

9.2 Strengths

The main strengths of Ballyclare Town Centre as identified through the Town Centre Health Check include:

- There appears to be adequate parking provision within the town centre, making it attractive and accessible.
- Bus station only a short walk from the town centre.
- Presence of an hourly town bus service in a town of less than 10,000 people.
- Bus stops allow shoppers to alight at one end of the town centre and board again at the other.
- Recent public realm improvements carried out in the heart of the town centre.
- Land use distribution relatively even and broadly comparable with the UK averages.
- Increase in the level of convenience outlets since 2001.
- High proportion and range of independent, local businesses.
- Strong service sector.
- Some office accommodation contributing to daytime vitality.
- High proportion of residential accommodation in the town centre, contributing to vitality.
- Significantly increased footfall since 2003, suggesting improved vitality and viability.
- Strong traditional retail core in the northern end of Main Street
- Good strategic location within surrounding rural hinterland.
- Asda acts as an important anchor in the north of the town centre.
- Market town status and relatively large catchment population is a strength from a retail perspective.
- The Leisure Centre is an excellent resource and important attractor to the town centre.
- XXX

9.3 Weaknesses

The main weaknesses associated with Glengormley Town Centre have also been identified through the Town Centre Health Check, including:

- High dependence on the private car as the mode of travel.
- Chronic congestion on all approach roads to, and within, the town centre.
- Limited public transport links, especially on a weekend.
- Inadequate and narrow footpaths in some areas of the town centre.
- One-way system around the town hall, effectively making it a traffic roundabout.
- Public space at the heart of the town (The Square) has been given over to parking.
- Domination of both moving and parked cars, both

visually and in terms of impact on pedestrian movement.

- Convenience retail provision dominated by Asda and Woodside's Supervalu.
- Limited representation of larger multinational retailers.
- Commercial leisure service sector is relatively weak, despite the presence of the Six Mile Leisure Centre.
- High vacancy rate, which has remained since 2001, suggesting some units are unsuitable for modern retail.
- Low footfall associated with clusters of vacant units to the southern end of Main Street and at North End.
- Local shoppers appear to choose competing centres on a Saturday.
- Very low pedestrian flows associated with the park.
- Considerable leakage to nearby competing retail centres such as Belfast City Centre, Larne, Newtownabbey and Ballymena.
- Offers little for families and visitors to the area in terms of good quality restaurants and evening entertainment.
- Significant fall in retail rents since 2003, to one of the lowest levels in Northern Ireland.
- Few recent transactions within the Primary Retail Core.
- Asda does not provide cross-trade to the rest of the town centre.
- Woodsides Supervalu is also physically disjointed from the town centre, with its frontage facing away from the town centre.
- Little prospect of attracting a number of high profile multinational retailers.
- The Leisure Centre is not well integrated into the town centre.
- Pubs / bars and restaurants not particularly amenable to families and young people.
- Proliferation of low quality fast food outlets.
- XXX

9.4 Opportunities

The main opportunities identified to improve Glengormley Town Centre include:

- Major population growth as a result of the 2,430 home scheme to the west of Ballyclare.
- Ballyclare Relief Road is expected to greatly reduce traffic volumes in the town centre.
- Potential to improve cycling routes and facilities in the town centre.
- Clusters of vacant sites represent an opportunity to deliver larger, modern retail units.
- Park has potential to act as a major footfall generator to the southern end of Main Street.
- Potential to provide suitable retail accommodation in the future at a relatively lower cost than that which is offered in competing retail centres.
- The public sector may be able to facilitate the assembly of a large enough site to improve the viability of a new retail development.
- Provision of a better link between Asda and the established town centre retail core.
- Potential to attract a number of large multinational retailers.
- Potential to attract a number of Northern Irish and independent retailers.
- Refurbishment of smaller traditional units is likely to be suitable for high end fashion boutiques.
- May be some potential for new small scale bulky goods

floorspace.

- Significant expansion in the tourism economy of Northern Ireland which Ballyclare could capitalise upon.
- Potential to attract a children's indoor play facilities to Ballyclare.
- Some traditional terraced units on the periphery of the town centre could be converted back into residential use.
- XXX

9.5 Threats

The main threats to the success of the Town Centre inthe future include:

- 'Challenging' trading conditions UK-wide as a result of the "worst economic recession since the 1930s.
- Strong competition from Belfast City Centre, the Abbey Centre in Newtownabbey, Ballymena, Larne and Junction 1 in Antrim.
- New Asda stores in both Larne and Antrim may be to the detriment of the Asda in Ballyclare.
- XXX

9.6 Conclusion

XXX

Tribal
Enterprise House
55-59 Adelaide Street
Belfast
BT2 8FE

T 02890 726 030
F 02890 726 087
E info.consulting@tribalgroup.co.uk

www.tribalgroup.co.uk/masterplanning