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FERMANAGH AND OMAGH

Position Paper Four

Town Centres and Opportunity Sites

February 2015

Accommodating Town Centre Development in Fermanagh and Omagh

Purpose: **To provide the Shadow Council with an overview of the town centres in Fermanagh and Omagh and their potential for accommodating growth and to consider a proposed Retail Hierarchy for the new Plan area**

Content: **The paper provides:**

(i) **The regional policy context for retailing in Fermanagh and Omagh**

(ii) **A brief review of town centre research and retail trends in the UK and NI**

(iii) **An overview of town centre policy and provision of opportunity sites in the Fermanagh and Omagh Area Plans**

(iv) **A summary of findings from Town Centre Studies for Enniskillen and Omagh towns**

Recommendation: **That the Shadow Council considers the findings and the proposed Retail Hierarchy for Fermanagh and Omagh**

1.0 Introduction

1.1 This is the fourth of four papers aimed at:

- building the capacity of members to make informed planning decisions, particularly within the plan making context;
- providing baseline information which will inform planning policy making at local level; and
- linking with important ongoing work in relation to the development of a Community Plan and other strategic work undertaken by the Council.

1.2 The purpose of this paper is to inform the newly formed Shadow Council for Fermanagh and Omagh on the take up of any town centre development opportunities identified in the current area plans as well as an analysis of the nature of the retail offer, rental information and vacancy rates. The primary focus of the paper has been on the two main towns of Enniskillen and Omagh with some limited information also provided for the five local towns. Sources of information have included the existing Enniskillen and Omagh Town Centre Masterplans, DOE Planning surveys and the findings from a comprehensive review of existing town centres in Northern Ireland carried out by consultants GL Hearn on behalf of DOE Planning in 2013. This latter report provided the evidential context on possible future planning policy direction as reflected in the draft SPPS. The paper allows members to commence consideration of how a retail hierarchy may be formulated within the context of the RDS and the Strategic Planning Policy Statement.

2.0 Regional Policy Context

2.1 The Regional Policy Context is provided by the Regional Development Strategy (RDS) 2035 and regional planning policy statements. A summary of these documents as they pertain to plan making and town centre development policy is provided in the following sections.

(a) Regional Development Strategy

2.2 The RDS supports both urban and rural renaissance (RG7) and recognises that regeneration is necessary to create more accessible, vibrant city and town centres which offer people a choice for shopping, social activity and recreation. Urban renaissance is described as the process of development and redevelopment in urban areas to attract investment and activity, foster revitalisation and improve the mix of uses. It advises that innovative ways should be developed to bring forward under-utilised land and buildings particularly for mixed use development with a focus on integrating new schemes within the existing townscape.

2.3 The RDS 2035 recognises the inter-regional gateway function of Enniskillen being only 1 hours drive to Sligo. It also recognises the strategic location of Omagh on the Western Economic Corridor that connects the town with Londonderry and Dublin. As Hubs, these towns perform economic roles and their town centres provide a range of employment opportunities, therefore they are expected to be the prime locations for businesses, housing, administration, leisure and cultural facilities (SFG 13). For small towns and villages which have been static or declining and contain areas of social need, an integrated approach between government departments, agencies and communities will ensure that regeneration plans reflect the specific needs of each community.

(b) Regional Planning Policy Statements

2.4 Planning Policy Statement 5 (PPS 5) Retailing and Town Centres outlines the regional policy on town centres and retail development. When introduced in June 1996, it took precedence over existing development plans in relation to retail planning policy and policies for town, district and local centres.

2.5 This document is to be replaced by the Strategic Planning Policy Statement (SPSS), a Draft of which was issued for consultation in February 2014. The new draft strategic Town Centres and Retailing policy aims to **support and**

sustain vibrant town centres across Northern Ireland, consistent with the RDS 2035. Unlike the existing PPS 5, it adheres to a more stringent town-centre first approach, bringing Northern Ireland into line with town centre policy in other jurisdictions. The policy objectives therefore are to:-

- secure a town centres first approach for the location of future retailing and other main town centre uses;

- adopt a sequential approach to the identification of retail and main town centre uses in local development plans and when decision-taking;

- ensure local development plans and decisions are informed by robust and up to date evidence in relation to need and capacity;

- protect and enhance diversity in the range of town centre uses appropriate to their role and function, such as leisure, cultural and community facilities, housing and business;

- promote high quality design to ensure that town centres provide sustainable, attractive, accessible and safe environments; and

- maintain and improve accessibility to and within the town centre.

2.6 In preparing LDPs, the draft SPPS recommends that councils should undertake an assessment of the need or capacity for retail and other main town centre uses across the plan area. A key element in developing the evidence base will be preparation of town centre health checks containing information on a range of indicators and which should be regularly updated (at least one every five years). They will contain information on a range of indicators, including:

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

2.7 From this evidence base, LDPs should include a Retail Strategy and contain appropriate policies and proposals that must promote town centres first for retail and other main town centre uses (includes cultural and community facilities, retail, leisure, entertainment and businesses). Plans should also:

- define a network and hierarchy of centres – town, district and local centres, acknowledging the role of rural centres;

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

3.0 Town Centre Research and Retail Trends in NI and the UK

3.1 In preparing the research report - Town Centre and Retailing Research Project (DOE NI)(January 2014) - GL Hearn et al undertook an assessment of the current health of designated town centres and provided an assessment of town centre and retail trends. The town centre health checks were carried out on 24 towns and cities using a variety of health check indicators (see Appendix 1). Town centre composition data was obtained from Experian Goad who undertake physical town centre surveys and prepare occupier plans for most town centres in the UK. Overall the town centre health checks did not identify any towns that were performing badly, but equally there was little evidence of any particularly strong performance. There is clearly room for improvement in the vitality and viability of the town centres and a policy stance which seeks to protect and enhance town centre performance and diversity will contribute to uplifting existing centre vitality and viability.

3.2 Some of the key findings regarding town centres in Northern Ireland were:

- The majority of centres fell below the national average of 80,170 sqm gross, with only Bangor, Coleraine, **Enniskillen**, Lisburn, Ballymena, Newry and Londonderry sitting above this threshold.
- Convenience goods floorspace was focused in a proportionately small number of larger units and reflects the wider UK trend of the dominance of larger supermarkets in meeting convenience shopping needs.
- Service uses take up a larger proportion of town centres by unit number, reflecting the smaller sized units these uses tend to occupy and often the secondary nature of that floorspace.
- The proportion of other town centres uses was notably higher in NI than the UK average and included uses such as transport services, employment and commercial activities, religious buildings, wholesale trade, civic and unclassified buildings.
- Having a range of other uses within town centres should be seen as a positive attribute helping to attract people into town centres and contribute to overall vitality and viability.
- The majority of centres had a vacancy rate which exceeded the UK national average (12% in 2013). The average vacancy rate was 14.5%

by unit and 11.9% by floorspace. This differential reflects the fact that vacant floorspace includes a disproportionate number of smaller units, a trend reflected in the UK.

- Much of the vacancy is within the secondary/tertiary areas rather than prime retailing frontages.
- Many town centres are characterised by edge-of-centre and out-of-centre foodstores and retail parks.
- The amount and quality of out-of-centre retailing and its convenience in terms of accessibility and free car parking are attractive to shoppers. They also tend to have fewer vacancies suggesting a good level of demand for modern larger space units.

A summary of the main findings of the town centre health checks for Enniskillen and Omagh is featured in section 5.0 Town Centre Studies.

3.3 The report also highlighted in an analysis of retail proposals since 2000 that the majority of applications were for non-town centre locations. An example of this in Omagh is the Opportunities Omagh site at Derry Road which incorporates a number of uses including a supermarket. In Enniskillen, both the Tesco and Asda stores at Derrycharra are outside the town centre boundary.

3.4 There are also a number of town centre issues facing Northern Ireland towns which are summarised in Table 1. The weaknesses and threats identified by GL Hearn "indicate that it would be appropriate to have a stronger policy stance on protecting and enhancing town centres, encouraging private sector investment and development and making town centres the focus for not just retail but other significant footfall generating uses".

Table 1: Town Centre Issues

Strengths/Opportunities	Weaknesses/Threats
• Diversity of existing town centres • Strong local independent retail offer • Good quality physical environment • Town centre parking, particularly short stay 'on street' provision. • Employment uses within town centres • Good accessibility and public transport hubs.	• Vacancies and potential obsolesce of some floorspace • Low and falling retail rents • Amount and profile of out of centre retailing • Development pipeline • Limited private sector town centre development/investment • Heavy traffic flows and congestion leads to conflict with shoppers

3.5 The retail sector is also described as one of the most dynamic sectors of the UK economy and is constantly evolving and adapting in response to consumer and lifestyle tends and other market influences. Over the past 30 years, the retail sector has experienced growth in both personal income and disposable consumer spending, coupled with population growth. However, the recession has had a depressing effect and retail spending year on year for the next three to five years is expected to be low.

3.6 Another significant change has been the rise of home shopping and electronic commerce. The home shopping sector includes a number of retailing channels including catalogue sales, direct retailing, TV shopping and internet shopping. An increasing number of ‘high street’ retailers now offer internet shopping.[1] eRetail now accounts for around 10-12% of the UK retail sales. However, the growth in online shopping habits does not mean the death of the High Street. The arrival of ‘click and collect’ where consumers order online but visit the store to collect their goods can be good news for the market. For example, eBay recently announced a trial ‘click and collect’ service to allow customers to collect from Argos stores, purchased products from around 50 eBay merchants.[2] John Lewis has a similar type of arrangement with local shops in Northern Ireland such as Spar and Costcutter. This service can help ensure that town centres continue to achieve footfall and remain viable.

3.7 Nationally, the food and beverage sector is one of the few town centre components which does still continue to show growth, fuelled primarily by coffee shops (e.g. Starbucks, Café Nero etc) and family dining operators (e.g. Pizza Express). These outlets do provide vitality and footfall to town centres but it needs to be balanced carefully against the loss of retail.[3]

3.8 There is also a growing trend by national multiple retailers to rationalise their property portfolios into larger stores in the larger centres for economies of scale and market penetration. This has implications for Northern Ireland’s centres, many of which are neither large enough nor have enough shop units to attract national multiples. Retailers are looking at affordability in their overall occupancy costs and will more readily locate in out of town or even secondary locations where business rates are not so prohibitive.[4]

3.9 In conclusion, the GL Hearn report suggested that in order for town centres throughout the UK to prosper, they needed to offer an experience over and above an average functional shopping trip which might otherwise be carried out on line or at the out of town retail park. The emphasis is on making town centres more attractive, viable and sustainable with more mixed use futures i.e. not just focusing on traditional shopping.

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[1] GL Hearn – Town Centres and Retailing Research Project (DOE NI) January 2014.
[2] Northern Ireland Commercial Property Report 2013 (Lisney)

[3] GL Hearn – Town Centres and Retailing Research Project (DOE NI) January 2014.
[4] Northern Ireland Commercial Property Report 2013 (Lisney)

4.0 Existing Fermanagh and Omagh Area Plans

4.1 Both the existing Fermanagh Area Plan and Omagh Area Plan recognise a retail hierarchy with the District Towns occupying the dominant position supported by the local towns and villages. The Omagh Area Plan recognises that Omagh's central position ensures a catchment over the whole district whereas Fermanagh has an important cross border role providing shopping facilities that benefit a catchment in Counties Donegal, Cavan, Monaghan and Leitrim. The local towns in contrast operate inside the main town's catchment and offer varying levels of shopping and commercial facilities related to meeting the daily and weekly shopping needs of their hinterland. The role of the villages and hamlets role is limited to catering for local day-to-day shopping needs.

4.2 The existing Area Plans designated town centre boundaries for Omagh, Enniskillen, Lisnaskea and Irvinestown. Fintona, Dromore and Carrickmore have no defined town centre boundaries. Where town centres are defined, it was anticipated that commercial activity would concentrate within them. New shopping and office development in the established town centres helps retain their vitality and viability. Within the main towns, opportunity sites and policy areas were designated within the town centres. The take up of these is examined.

4.3 Members should also be aware that Conservation Areas (CAs) are designated within the historic and commercial cores of Enniskillen, Omagh and Lisnaskea in recognition of the architectural and historic contribution these make to the respective towns. The designation of a Conservation Area can bring positive benefits to a town centre through proposals which enhance the historic built character such as high quality shop-fronts, facades and - where demolition has been accepted - high quality, contemporary buildings .

4.4 Conservation Areas also provide the potential to attract additional funding streams such as the lottery funded Townscape Heritage Initiative (THI) and NIEA Historic Buildings Unit for works to listed buildings - a high concentration of which can normally be found located within the CAs. These complement other mainstream town centre regeneration initiatives including the recent DSD funded Revitalisation Programmes (Enniskillen & Omagh) and DOE Dereliction Intervention Scheme (DIS) which collectively seek to create quality townscape environments.

(i) Enniskillen Town Centre

4.5 Enniskillen performs an important role as the main service centre for the south west of Northern Ireland as well as a strong cross border shopping function given that it borders four counties in the Republic of Ireland - Donegal, Cavan, Leitrim and Monaghan. The area stretching from West Bridge to Dublin Road and Forthill Street is designated as the Commercial Core of Enniskillen (Policy TC1) (Appendix 2 –Maps) and contains the traditional concentration of retailing and other town centre uses. The frontages of Belmore Street, East Bridge Street, Townhall Street, the Diamond, High Street and Church Street are designated as Primary Retail Frontage (Policy TC2). This places restrictions on non-retail shop proposals at ground floor level within these streets. The remaining streets within the town centre are secondary shopping areas and proposals for local services, offices and food uses will be determined on locational merits.

4.6 The Plan identified seven opportunity sites within the town centre as having special merit for a particular land use. The Plan refers to Enniskillen Town Centre as being an attractive retail, tourist and general service centre. The Plan sets out a range of objectives for Enniskillen Town Centre. This was to retain and consolidate the existing commercial attraction of the town centre shopping streets, to promote the continued development of the town centre as a major tourist and recreation attraction and to incorporate suitable sites to meet small scale craft and mixed business need.

4.7 Most of these sites have been developed, notably the Portora Wharf Holiday Apartments and retail units, the Clinton International Peace Centre and Youth Hostel accommodation and the Railway Junction Retail Park with Lidl, Curry's and Carpetland (Appendix 3). In addition, four Policy Areas were identified within the town centre at Castle Barracks, Buttermarket Area, land to the north of Dublin Road/Tempo Road and Derrychara Industrial Units (Appendix 3).

(ii) Omagh Town Centre

4.8 Omagh has an extensive town centre boundary which is mainly contained at its southern side by the Great Northern Road but with an extension beyond this as far as the Asda store on Dromore Road. It extends northwards from the river as far as the junction of Lisanelly Avenue/Old Mountfield Road junction. The commercial area of Campsie Road is also included and an area along the Derry Road opposite the PSNI station. Omagh's main shopping frontages are along High Street, Market Street, Bridge Street, John Street and George's Street and areas accessed from them including Scarffe's Entry, Foundry Lane, Prospect Court and Old Market Place. However, the western section of High Street in the vicinity of the courthouse has a concentration of offices.

4.9 Within the defined town centre limit 15 Opportunity Sites and 5 Policy Areas were identified (Appendix 2 - Maps). Most of the opportunity sites have been developed with the developments of Dunnes Store, Lidl (James Street) and the Showgrounds Retail Park strengthening the shopping attraction of the town (Appendix 4). This has been complemented by retail developments on non-identified town centre sites such as the former Royal Arms site and the out-of-town-centre retail park at Tamlaght Road (the Great Northern Retail Park). In particular, new retailers such as Argos, Marks & Spencers, Next and Homebase have all added to the variety of shops on offer. The town has also grown as an administrative centre with the development of offices at Scarffe's Entry and Sedan Avenue. The town's role as an educational and cultural centre has also improved with the provision of the Strule Arts Centre and South West College of Further Education.

4.10 The creation of a Riverside Walkway/Cyclepath from Abbey Bridge through the MoD lands of Lisanelly and St. Lucia connecting to the new proposed Strathroy Link Road, will provide an important link to the town centre as well as an attractive recreation asset. This scheme is almost completed and will be further complemented by the OASIS project at Drumragh Avenue car park which is under construction and due for completion in March 2015. It will create a new public space or plaza above the car park and includes a new foot/cycle bridge across the river into Old Market Yard. Just outside the town centre boundary, there are plans for a new Omniplex, eight screen cinema on the former Desmond's factory site. The St.Lucia site also offers the potential for development although it too is outside the town centre.

(iii) Lisnaskea Town Centre

4.11 Lisnaskea is the second largest town in Fermanagh and provides a range of shops and services including a Supervalu store and Lidl store. One Opportunity Site was identified to the west of the town centre suitable for a comprehensive development scheme. It is currently used as a car park. The listed Corn market contains a number of small shop units.

(iv) Irvinestown Town Centre

4.12 The Plan encouraged development along the Pound Street/Mill Street link road. Supervalu and a number of other retail units have been established, thus creating a retail frontage. The centre remains relatively vibrant with a range of shops and services.

(v) Fintona, Dromore and Carrickmore

4.13 These three towns do not have town centres designated within them. Each of them has a limited range of shops and services, including one or more small food shops. There is a Supervalu store in Fintona. Essentially they perform the function of meeting the daily needs of people living in their immediate hinterlands.

Town Centre Masterplans

4.14 Whilst existing Area Plans provide the statutory planning framework for land use proposals, it is acknowledged that Town Centre Masterplans, although non-statutory, perform an important role in focusing regeneration initiatives and public realm improvements in our town centres. They are commissioned by the Department for Social Development (DSD) who work closely with the district council and other stakeholders to set a vision for the town centre, identify key proposals for realising that vision and how those proposals may be delivered over a set time period. Enniskillen Town Centre Masterplan was published in 2012. Omagh's Town Centre Masterplan, published in 2009, is currently under review and the revised version is expected before the end of March 2015.

(i) Enniskillen

4.15 The Enniskillen Masterplan (2012) seeks to reinforce its position as a Regional Hub and Gateway as the County Town of Fermanagh and the vision for Enniskillen is enshrined in a set of seven core regeneration objectives which is hoped will contribute to the long term vitality and viability of the town centre.

4.16 The Masterplan identifies three major opportunity sites as being important to the wider regeneration of the Town Centre, offering the opportunity for more comprehensive redevelopment on a large scale. These are:-

- The PSNI site
- The Buttermarket
- Bus Station

4.17 Although outside the town centre boundary, the Masterplan also recognises the significant opportunity presented by the vacated former Erne Hospital site. Given its size, its potential redevelopment as a shared services facility for public sector offices would allow the release of sites such as the Housing Executive, Library, Jobs and Benefits office and South West College within the town centre which could be considered for residential or commercial development. However, at present, only South West College has plans to relocate to the former hospital site. A new Ambulance base will also be built on the site which is currently being demolished.

4.18 Along with a range of interventions on a variety of sites across the town centre, an Environmental Improvement (EI) scheme is proposed to the main thoroughfare and Wellington Street along with public realm schemes such as at the Buttermarket. An environmental improvement along Queen Elizabeth Boulevard has already been complete and work has commenced on regeneration works to the Castle Basin and redevelopment of Enniskillen Castle.

4.19 To improve Enniskillen's role as a tourism hub in Fermanagh and take advantage of its island setting, the Masterplan also contains tourism proposals aimed at providing more accessible water-based activities, walking and cycling trails, heritage trails, a wider programme of events and festivals and repositioning of the Town Centre retail offer towards one - or a series of - niche (high quality) retail offers. An additional hotel close to the waterside is another proposal.

4.20 There is no doubt many businesses are experiencing difficulties in today's challenging economic climate such as empty and dilapidated properties. In response, Fermanagh District Council through the DSD Revitalisation Scheme successfully delivered shop-front improvements to many individual properties which have collectively improved the appearance of the historic core of the town. This was implemented in 2012 to coincide with the G8 Summit.

(ii) Omagh

4.21 The current Omagh Town Centre Masterplan (2009) acknowledges that High Street and Market Street are the most important streets and should remain so as the town develops into the future. It proposes that High Street/Market Street remains the focus of further investment to ensure that its shops and businesses are economically sustainable. Its historic fabric of churches, narrow streets and barrack buildings such as the Courthouse will be conserved and revitalised to become a vibrant part of the town. Indeed, part of this strategy is currently being realised along John Street with the DSD funded Revitalisation Scheme bringing forward a series of physical works including cover up treatments, painting, signage and new shop-front schemes and interpretation panels showcasing the town’s heritage. Funding is also being made available for other initiatives such as marketing strategies which include social media strategies, installation of wi-fi, design of town centre websites and digital marketing awareness programmes.

4.22 The Masterplan focused on six core areas, each with a primary role in terms of land use and regeneration and aimed at maintaining a mixed-use town centre that comprises of commercial, leisure and residential uses. One of these areas is the former army land at Lisanelly, a 126-acre site which now has planning permission for a Shared Educational Campus. This will see the relocation of six schools (Arvalee School and Resource Centre; Loreto Grammar School; Omagh High School; Sacred Heart College; Omagh Academy and Christian Brothers Grammar School) at an estimated cost of £120 million. While the benefits are widely accepted, this is an ambitious project which will nevertheless present a series of challenges/opportunities for the town centre such as impact on vitality and viability as well as coming up with alternative and compatible uses when these existing school sites are eventually vacated.

4.23 The Omagh Town Centre Masterplan is currently being revised and aims to redefine the role of Omagh as a place with a distinctive character and retail offer and strengthening its links with its surrounding area as part of its ‘Outdoor Omagh’ theme. Amongst some of the draft proposals are sustainable transport planning, High Street Pedestrianisation, riverfront development and public realm works.

4.24 Complementing the Town Centre Masterplan is Omagh’s Visioning Framework 2025 which proposes a range of social, economic and physical interventions that could shape the future development of the town. A key objective of the Visioning Framework is the objective to achieve city status for Omagh town.

5.0 Town Centre Studies

5.1 In preparing a plan, a town centre retail capacity study and a town centre health check, incorporating retailer and shopper surveys, may be undertaken. A town centre health check is essentially a qualitative assessment in that it looks at the attractiveness, accessibility and amenity of the town centre. Although no single indicator can effectively measure the health of a town centre, the use of a series of them can provide a view of performance and offer a framework for assessing vitality and viability. Vitality is a measure of how busy a centre is and viability is a measure of its capacity to attract ongoing investment for maintenance, improvement and adaptation to changing needs. Key indicators include accessibility, customer views, diversity of uses, retailer profile, environmental quality, pedestrian flows, retailer views, shop rents, crime and vacancy rates.

5.2 The health checks undertaken by GL Hearn to inform the draft SPPS, are not full and detailed vitality and viability assessments but are intended as a snapshot of each town centre to provide a flavour of the current diversity and performance. Their findings which are included in this section, supplement retail landuse survey work undertaken by the Western Area Planning Office and information obtained from the Town Centre Masterplans for Enniskillen and Omagh.

5.3 A retail capacity study is a 'quantitative' assessment of the need for additional retail floorspace over the Plan period. This will include catchment area definition, calculating total expenditure and turnover of convenience and comparison goods, and projection of future needs. A retail capacity study was not required to be undertaken to inform this preparatory paper. However, the findings from recent retail capacity studies prepared by consultants for the Town Centre Masterplans for Enniskillen and Omagh have been included for information purposes only.

(i) Enniskillen Town

5.4 The retail floorspace within the town centre is estimated to be 99,330 sqm gross (2013) consisting of convenience, comparison or service uses[5]. There are two primary areas for retailing purposes in Enniskillen Town Centre. Firstly, the northern element of the area defined as Primary Retail Frontage which encompasses Townhall Street, the Diamond, High Street, Church Street and Belmore Street. Secondly, the area centred around the Erneside Shopping Centre.

[5] GL Hearn – Town Centres and Retailing Research Project (DOE NI) January 2014.

5.5 DOE Planning has undertaken land use surveys of the town centre since 2009 focusing on the primary and secondary shopping streets and Erneside. Of the 340 units surveyed in 2015, convenience outlets account for 5.9% (Appendix 5). With the exception of Iceland, no national foodstore operators are present in the town centre but there is a good level of representation of independent convenience retailers including 2 butchers, 2 greengrocers, a bakery, fishmonger, several small convenience stores and a health food shop. The development of standalone Tesco and Asda outlets outside the town centre off Derrychara Road has resulted in this area becoming the key attractor for non-Enniskillen based shoppers from the Republic of Ireland.

5.6 In terms of comparison provision, there is a selection of clothing and footwear retailers alongside a number of national multiples and clothing-led department stores throughout the traditional town centre. Other comparison sectors represented include homewares, sports goods, books/stationary and phone shops. In 2015, 33.5% of town centre outlets were comparison compared to 31% in 2009. These are mainly concentrated in Erneside, followed by High Street, Townhall Street and the Buttermarket, the latter of which provides niche arts and crafts space (Appendix 5).

5.7 Financial and business uses including banks, building societies, financial advisors, solicitors and estate agents are found throughout the town centre but with a notable concentration along East Bridge Street in the vicinity of the Court House and County Buildings. In terms of retail services, there is a range of restaurants, public houses, cafés and hot food takeaways, with dry cleaners, hairdressers, dentists and beauty salons occupying smaller side streets and units on the periphery of the main shopping street. These account for approximately 32% of outlets. Belmore Street and Forthill Street are characterised by a high concentration of retail service uses such as takeaways/restaurants. In particular, Belmore Street has nearly 39% of its units categorised as retail services (Appendix 5).

5.8 There is significant edge-of-centre floorspace. The A4 (Shore Road/Firths Pass) effectively divides the traditional Primary Shopping Area focused along High Street/Townhall Street/East Bridge Street from both the older secondary areas along Belmore Street and the newer developments of Dunnes Stores(Fair Green Shopping Centre) and Erneside Shopping Centre.

5.9 Rental values also provide an indicator of vitality. Enniskillen's prime areas of retail floorspace in the town, as measured by shop rents, are found along Townhall Street and High Street. Enniskillen's Primary Zone A rents (as defined as the most valuable area of the shop i.e. the first five-metre depth) are higher than Omagh, Cookstown, Dungannon and Magherafelt (Table 2). Significantly it is Erneside which enjoys the highest rental values. However, with the onset of the recession, rental levels across town centres have decreased since 2009.

Table 2: Town Centre Rents 2009- 2013

	2009		2011		2013	
	Prime Zone A £/sq m	Secondary Zone A £/sq m	Prime Zone A £/sq m	Secondary Zone A £/sq m	Prime Zone A £/sq m	Secondary Zone A £/sq m
Enniskillen	460	270	380	250	340	210
Omagh	420	220	360	210	320	200
Cookstown	360	220	300	200	250	180
Dungannon	360	220	300	210	240	200
Magherafelt	300	210	270	200	250	180
Erneside Enniskillen	700 Zone A		640 Zone A		600 Zone A	
The Linen Green (Dungannon)	130 Zone A		115 Zone A		100 Zone A	
Oaks Centre (Dungannon)	240 Zone A		210 Zone B		170 Zone A	

Source: Lands and Property Services, 2014

5.10 Vacancy rates are a measure of how healthy a town centre is and the overall vacancy rate within the surveyed area has increased from 13.5% in 2009 to 15.3% in 2015. According to Lisney[6], vacancy rates are declining although the vacancy rate in Northern Ireland in 2014 was 17.7% compared to the average vacancy rate in the UK of 10.3%. Belmore Street and Darling Street both have high concentrations of vacant units with vacancy rates of 25.5% and 29.7% respectively. This may be due to their more peripheral location relative to the core of the town centre.

5.11 Business rates have been cited as the primary factor in deterioration in the level of occupancy on the prime pitch (primary shopping streets). The introduction of revised rateable values – effective from 1st April 2015 – is anticipated to bring reductions in rates for prime retail shops in the high street (e.g. Market Street, Omagh, High Street, Enniskillen) and in the main shopping centres (e.g. Erneside)[7].

5.12 Pedestrian flows are highest along High Street and Townhall Street. According to GL Hearn (2012) there is also evidence of people linking trips with the town centre and Erneside Shopping Centre with a regular stream of footfall down Regal Pass and over the river footbridge. Footfall is limited along Forthill Street where traffic is heavy. The quality of linkages between the out-of-centre foodstores and the main town centre is poor. This is manifested in the limited pedestrian footfall coming to and from the stores.

[6] Northern Ireland Retail Update 2014 (Lisney)
[7] Northern Ireland Retail Update 2014 (Lisney)

5.13 The centre is located on the A4 and serves a wide rural catchment including border counties. There is ample car parking provision around the town centre and for those using public transport, the Ulsterbus station is located to the south of Shore Road (A4), with reasonable pedestrian linkages across the main road into the town centre via Eden Street.

5.14 In terms of environmental quality, there has been some investment in the public realm in the pedestrianised area of Eden Street, The Diamond and Water Street, outside of the Council Offices. Whilst not subject to the same level of investment, the environment on Townhall Street and High Street, which lies within the heart of the Conservation Area, is not heavily trafficked and lined with buildings which are generally of good townscape quailty. The linkages to Erneside Shopping Centre are considered to be high and the bridge over the river provides an attractive route for pedestrians whereas the junction of Belmore Street, Forthill Street, Dublin Road and Firth Pass with limited crossing opportunites over the busy road.

5.15 Tom Phillips and Associates, in association with Scott Wilson, were commissioned to prepare a Retail and Commercial Leisure Capacity Study (November 2010) of Enniskillen Town Centre to inform the preparation of the Masterplan for Enniskillen Town Centre. In terms of estimating retail need (with a forecast year of 2025), the Study recommended a balanced approach to accommodating retail growth that both recognises the potential benefits of cross border trade but guards against oversupply and competition from out of town development. It proposed that the Masterplan should seek to accommodate 2000-3000 sqm of convenience floorspace and 4000-7000 sqm of comparison floorspace.

5.16 The Study also indicated that in regard to commercial leisure floorspace provision, there was capacity for restaurants, wine bars/bars and cafés. In addition, indoor non-amusement type entertainment facilities (e.g. ten pin bowling) could be provided as part of wider schemes in the town centre area. These would also contribute to expanding the evening/night time activity in the town centre.

(iii) Omagh Town

5.17 Omagh provides an extensive range of retail, commercial, administrative, educational and health services for a large rural community. Its shopping function has developed steadily to provide a wide range of stores. The retail floor-space within the town centre is estimated to be in the region of 54,600 (sqm gross)[8]

5.18 In terms of convenience uses, Supervalu occupies a prominent location along Market Street with an Iceland store located along Kevlin Road which is a secondary frontage. The Supervalu building is currently undergoing

[8] GL Hearn – Town Centres and Retailing Research Project (DOE NI) January 2014.

remodelling in preparation of the arrival of Primark who will occupy the ground floor with Supervalu relocating to the lower ground level. There are also several smaller businesses such as two butchers, two bakers, three off-licenses, a health food shop and several grocers. There are also four chemists, two of which are family-run businesses. In 2015, it was estimated that the convenience component of the town centre accounted for 7.8% of the 358 outlets surveyed (Appendix 6) which is only a slight increase from 7.5% in 2008. This is broadly similar to the findings from GL Hearn's report.

5.19 The comparison element of the town centre is characterised by a wide range of clothing, footwear, accessories and small department stores with Poundstretcher which is located along Scarffe's Entry being the most prolific within the core of the town. Other outlets include sports shops, jewellers, toy shops, book shops, and video/game stores. There are a number of bulky comparison goods including furniture, electrical goods and carpet stores. Many of these businesses are independent retailers. Charity shops have a strong presence (approximately 7) within the town centre and located mainly along Market Street and Scarffe's Entry. It is estimated that the comparison goods shopping component accounts for 25% of town centre outlets in 2015 (Appendix 6). This is a decrease from 2008 when the proportion was 29%.

5.20 Outside the town centre core but within the town centre boundary are a number of notable convenience and comparison goods providers including Dunnes Stores to the east, Asda along the Dromore Road and Lidl along James Street. Further out of the centre is the Showgrounds Retail Park (M&S, Peacocks, Next, Tempest, Heatons, River Island, New Look and Laura Ashley). Great Northern Retail Park, located adjacent to the A5 and outside the town centre boundary, provides a focus for bulky comparison goods shopping including Homebase, Halfords, and B&M Bargains.

5.21 As for retail services, there are a large number of independent hairdressers, beauty salons, tanning parlours and barbers in the centre as well as a diverse hospitality offer which includes public bars, restaurants, cafés and coffee shops. Retail service outlets account for 33% of outlets in the town centre (Appendix 6). This is higher than the proportion of comparison outlets. Many of these are small units and found in peripheral or secondary streets such as Campsie Road, John Street and Castle Street. However, Market Street also has a notable concentration. Financial, legal and other professional services are also well represented with a concentration in High Street towards the Courthouse and John Street.

5.22 Omagh's prime areas of retail floorspace in the town, as measured by shop rents, are found along upper Market Street (west of Drumragh Avenue) and High Street (east of Foundry Lane). These areas have a concentration of comparison goods shops. Zone A rentals are slightly lower than Enniskillen's but both towns are performing better than the three main towns in Mid Ulster confirming their position as major retailing towns (Table 2).

5.23 In 2015, 19.8% of units surveyed in the town centre were vacant compared to 14% in 2008. There is a notable concentration of vacancy in Market Street with 15 units vacant, followed by John Street (11) and Castle Street (7). Lisney's vacancy rates for Omagh in 2013 were 16.5% and this was a deterioration from 2012 when the rate was 12%[9]. As referred to in paragraph 5.11, business rates have been a factor in the level of occupancy in primary shopping streets.

5.24 Most pedestrian activity occurs along Market Street (to the junction with Drumragh Avenue and Dublin Road) and High Street with strong flows also evident along Scarffe's Entry which leads to the town centre car parks. Low footfall was recorded in Old Market Place. The new bridge should help to improve footfall in this area thus making it more attractive for businesses.

5.25 Although Omagh town centre serves a significant rural hinterland, GL Hearn's report noted that bus services to and from the centre are primarily long-distance or very local, suggesting that the main mode of transport into the town is the private car. Good provision is made for carparking particularly to the south of the town centre. It was also highlighted in the health check for the Masterplan that a problem for the town centre was traffic congestion particularly at peak times such as school hours.

5.26 To inform the new Omagh Town Centre Masterplan, Strategic Planning was commissioned by the Paul Hogarth Company on behalf of DSD to prepare a Retail Capacity Study for Omagh Town Centre. The study provided a projected need to 2029 and concluded that there is no surplus expenditure in the catchment (defined as the district of Omagh) to support further retail floorspace selling convenience goods in Omagh town centre over the next 15 years. Similar to the conclusions from Colliers CRE report (2007) for the draft West Tyrone Area Plan 2019, available retail expenditure may support a certain amount of convenience retail floorspace, but the existing amount of retail floorspace including commitments, far exceeds what the current level of expenditure can support.[10]

5.27 Strategic Planning also concluded that there was only a small capacity (approximately 1,000 sq m net) for additional floorspace for comparison goods. Some of this may be taken up by existing retail commitments. However, it was emphasised that although there is little or no expenditure capacity to support further retail development in the catchment area, this should not become a reason to prevent further retail development in Omagh, particularly the town centre. It was also highlighted that with two thirds of shoppers who were interviewed in Omagh town centre viewing the area negatively (Shopper Survey, 2013), there was a need to improve the quality of retail development in the town centre. [11]

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[9] Northern Ireland Commercial Property Report 2013 (Lisney)
[10] Omagh Town Centre Masterplan – Retail Capacity Study (Strategic Planning) 2014
[11] Omagh Town Centre Masterplan – Retail Capacity Study (Strategic Planning) 2014

(iv) The Local Towns

5.28 Although a detailed land use survey has not been undertaken for the five local towns, the number of vacant properties has been noted during recent site inspections (2015). Of the five towns, Fintona had the most vacant properties with 25 followed by Lisnaskea with 15 vacant shop units. Most of the vacant units in Fintona are along Main Street and in Lisnaskea there is a high concentration to the south end of Main Street on the edge of the Conservation Area. In Irvinestown, only four vacant shop units were identified and these were mainly peripheral to the town centre core or Main Street. Dromore had one vacant property and Carrickmore had four (along the Main Street).

5.29 In summary, the key findings from these town centre studies are as follows:

- Recent retail capacity studies would suggest that there is only a modest need for additional floorspace in both Enniskillen and Omagh. However, such studies need to be updated to take account of changes in retail and property market trends, as well as spend and population growth projections;

- Both town centres have a diverse range of shops, retail services, offices and other businesses. This diversity – highlighted as a strength of many NI towns in GL Hearn's study for the DOE - is important to the vitality of town centres which should be viewed as multi-functional locations providing a range of uses including shopping, community, residential, office and leisure uses;

- Both town centres have a good presence of family-run or independent retailers alongside more well-known national multiples;

- Increasing vacancies in Omagh town centre, particularly in Market Street, is a concern. The new rateable values from 1st April 2015 may help to improve occupancy levels and attract new investors. However, this may be difficult to achieve in the present climate as many national and multi-national retailers who have been the mainstay of Northern Ireland's shopping centres and high streets are cutting back on the number of stores that they need, concentrating on fewer but better stores;

- The number of vacant properties in Fintona and to a lesser extent in Lisnaskea is also a concern and points to the need for regeneration measures to improve the vitality of both towns.

6.0 Conclusions

6.1 The key role for a development plan is to support and sustain vibrant town centres. Town centres should not be viewed simply as destinations for shopping but also places providing a wide range of uses to attract people into them. This includes cultural, community, residential, retail, leisure, public/open space, entertainment and businesses. From the studies for Enniskillen and Omagh, both towns already have a diverse range of uses although clearly there is room for improvement particularly in the commercial leisure and tourism areas in Enniskillen. These areas also have the potential for growth in Omagh as explored in the Omagh Town Centre Masterplan which is currently being revised.

6.2 In Omagh, it is recognised that the future release of vacated school sites within the town centre as a consequence of the development of the Lisanelly Shared Education Campus, will provide opportunities for the development of a wide range of uses (cultural and community facilities, residential, leisure, etc) which can assist in complementing the retail offer and attractiveness of the town centre. It also presents challenges for the Plan as development will be dependent upon the willingness of landowners/developers to release them. In Enniskillen, there is also uncertainty about the availability of some of the potential development sites identified in the Enniskillen Town Centre Masterplan. As part of the process of identifying sites to be allocated for town centre uses in the Plan, the draft SPPS suggests that councils should undertake a ‘call for sites’ consultation exercise.

6.3 The new Local Development Plan (LDP) will provide the opportunity to re-examine the spatial extent of existing town centres, define a primary retail core and allocate a range of suitable sites to meet the scale and form of retail and other town centre uses.

6.4 As set out in the draft SPPS, LDPs are also required to include a Retail Strategy and contain appropriate policies and proposals that must promote town centres first for retail and other main town centre uses. It has focused developer’s attention on town centres again rather than out of centre development. In line with regional policy, the Plan will need to ensure that retail growth remains focused in these centres. That said, the importance of the retail hierarchy across the district is also recognised in that retail facilities in the small towns, villages and at local level can complement the main centres. Thus, opportunities for small scale growth which helps meet the daily shopping needs of local residents and adds to the vitality of the small towns and villages through the creation of local services such as financial/professional services and cafes and restaurants, should be encouraged.

6.5 In light of this, Members’ views are sought on a proposed Retail Hierarchy for the Plan area as follows:-

The Hubs/Main town centres – the principal focus for new retail, commercial and leisure activities providing a broad range of facilities and services.

Local town centres – local service centres important for meeting both the daily and weekly needs of surrounding residents.

Village Centres – provide a small number of shops and services, including at least one food shop, a post office, and are important for meeting the daily needs of shoppers.

Neighbourhood or Local Centres – small groupings of shops, typically comprising a general grocery store, a sub-post office, occasionally a pharmacy and other small shops of a local nature.