



Derry City & Strabane
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DERRY CITY & STRABANE DISTRICT COUNCIL

LOCAL DEVELOPMENT PLAN (LDP) 2032



DRAFT PLAN STRATEGY

DS-302 – City-Town-District Centres Occupancy Study, December 2021

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DERRY CITY AND STRABANE DISTRICT COUNCIL

LOCAL DEVELOPMENT PLAN (LDP) 2032



City-Town-District Centres Occupancy Study

December 2021

This Document is one in a series which comprises the evidence base that informs the preparation of the Derry City and Strabane District Local Development Plan (LDP 2032) Plan Strategy.

This is a Submission document in accordance with Regulation 20(d) of the Planning (LDP) Regulations (NI) 2015.

Derry City and Strabane District LDP

2021 Update Health Check Assessment Across the Hierarchy of Centres

1.0 Background

1.1 Town centre health checks were undertaken by Juno Planning in November 2018 as part of the Derry City & Strabane District Council Retail Capacity & City/Town Centres Study. The study provided essential background information to assist the Council in the production of the relevant Local Development Plan documents and also to support the development management function.

1.2 This report aims to review the data collected in the 2018 report in respect of Derry City and Strabane District's seven main settlements of (a) Derry (b) Strabane (c) Castledearg (d) Newtownstewart and (e) Claudy, as well as (f) Sion Mills; and (g) Eglinton. The four District Centres in Derry i.e. Lisnagelvin, Northside, Springtown and Rath Mór were also reviewed. This report is an update to the original assessment and also includes two other retail locations in Derry (Crescent Link) and Strabane (Melmount Road) – though these are NOT considered to be part of the LDP Network of Centres.

1.3 The SPPS set out a range of indicators to inform the methodology for undertaking town centre health checks and these were presented under the broad headings in the 2018 report:

- Existing Town Centre Uses (Including resident population);
- Vacancy Rates;
- Physical Structure and Environmental Quality (including opportunities, designation and constraints);
- Footfall; and
- Retailer Representation.

1.4 The purpose of this report was to review the Vacancy / Occupancy Rates of the 2018 Health Check Assessment and review certain aspects of each settlement in turn, providing an updated overview and details of any changes relating to:

- Vacancy Rates;
- Charity Shops; and
- Retailer Representation.

1.5 The timing of this survey / report is considered to be particularly important, as the City & District emerges from the un-precedented period of 'adjustments' following the Covid-19 pandemic and the resultant lockdowns, home-working, online retailing boom, etc.

2.0 A1. Derry City Centre Health Check

Overview

2.1 The RDS 2035 and National Planning Framework (NPF) both identify Derry-Letterkenny as the regional growth centre(s) for the North West, being a metropolitan city region of up to 350,000 population. (Source: key cross-border and international gateway providing access by air, water and sea to the North-West. The RDS 2035 identified Derry as a linked Gateway for Northern Ireland.)

Health Check Assessment Area- Derry Area Plan 2011 'Commercial Core'

2.2 The Derry Area Plan 2011 (DAP 2011) designated a 'commercial core' in the city centre which straddles both sides of the River Foyle across the Craigavon Bridge. The commercial core encompasses the historic walled city area, surrounding lands on the Cityside as well as small area on the Waterside inclusive of Spencer Road and Duke Street. Within the Commercial Core, the Derry Area Plan defined the frontages of the following streets as 'Primary Retail Frontage':

- Strand Road, Waterloo Place, William Street, Waterloo Street, Shipquay Street, Butcher Street, The Diamond, Ferryquay Street, Bishop Street (Within the Diamond to London Street / Society Street), Foyle Street and Carlisle Road.

2.3 The Derry City Centre Health Check study focused primarily on the 'primary retail frontage' identified by the DAP 2011, the Spencer Road and Duke Street Waterside area located within the DAP commercial core and the remaining Clarendon Street / Queen Street area where office use is the primary land-use.

City Retail Profile – Overview

2.4 The city centre's primary retail area is centred on the Foyle side, Richmond Shopping Centres and the surrounding streets (identified as Primary Retail Frontage in the DAP 2011). The city centre contains a varied mix of national and independent comparison retailing, limited convenience retailing and a range of retail service provision. The 'Waterside' area (Duke Street and Spencer Road) provides local convenience and comparison retailing.

2.5 National multiple retail presence is concentrated in Foyle side Shopping Centre (approx. 37,160 sq.m) and the Richmond Centre (approx. 14,484 sq.m). Foyle side shopping centre is anchored by House of Fraser's which is the newest addition to the shopping centre, previously Debenhams, as well as Marks and Spencer and Dunnes and has dedicated car parking facilities. The Richmond Centre is located at Shipquay Street/ Ferryquay Street and is almost fully occupied with a range of retailers such as New Look, Sports Direct, Argos and Jack Jones. Quayside located on Strand Road is the remaining shopping centre and is anchored by Tesco. Quayside has a cinema (Omniplex) at first floor level complementing their retail offer.

2.6 The traditional city centre shopping areas are characterised by local independent comparison retailing and service provision. With the exception of Primark (Newmarket Street, directly between Foyle side and Richmond Centres), there is a noted absence of national multiple retailer presence in the traditional shopping streets. The city centre is branded as a regional tourist destination (Walled City of Derry) and the historic 'Walls of Derry' are a key tourist draw to the city. The 'Millennium Forum Theatre and Conference Centre' (Newmarket Street) provides a cultural focal point in the city centre. The strong tourism and cultural offer in the city centre complements the established retail provision there

Diversity of Uses

2.7 The original health check study reviewed Experian GOAD centre reports from 2016 for Derry-Londonderry city centre which reviewed the DAP 2011 primary retail frontage areas. The results were reviewed in the context of the 2018 health-check survey undertaken in the same area. The 2018 health-check study also reviewed the retail environment in the 'Waterside' area, though no GOAD centre information was available for this area. This 2021 update more informally studied the changes in the retail areas (looking at occupancy and vacancy and looking for broad changes in the balance of the types of uses) to see if the events of the COVID-19 pandemic or any other factors may have caused any changes to the local retail sector.

2021 Retail Survey

2.8 The 2016 GOAD centre report outlined that the city centre comprised approximately 85,554 sq.m of gross retail floorspace within 405 units. There has been no significant development of additional retail floorspace since the publication of the 2016 report. Table 1.0 compares the results from the 2016 GOAD centre report, the April 2018 health check survey and 2021 retail check survey. Table 1.1 details the percentage of units amongst the different retail land use categories and compares against the UK average.

Table 1.0: Diversity of Uses Derry-Londonderry City Centre by number of Units- Change from 2016 to 2021

Use	GOAD Centre Report 2016: No. of Units	Health Check Survey 2018: No. of Units	2021: No. of Units	Change from 2018-2021
Convenience	32	16	12	-4
Comparison	165	156	154	-2
Service	128	171	222	+51
Vacant Units	75	70	62	-8
Total no.	400	413	450	+37

Table 1.1: Diversity of Uses Derry-Londonderry City Centre by number of Units (2021)

Use	No. of Units	%	%UK Average
Convenience	12	2.66	9.67
Comparison	154	34.22	38.38
Retail Service	222	49.33	38.54
Vacant Units	62	13.77	12.24
Total No.	450		

2.9 There has been a decrease in the number of convenience retail units in the city centre between 2018 and 2021. Table 1.0 demonstrates that the city centre convenience retailing (2.66%) does not meet the UK benchmark figure for convenience retailing (9.67%). This has been decreasing steadily from 2016. The Convenience retail offer in the city centre is provided by top-up shopping provision at Marks and Spencer, Iceland in Foyle side and Tesco's at Quayside. Sainsbury's on the Strand Road is located outside the designated commercial core. However, there has been the addition of two new Centra convenience stores beside the Millennium Forum and Waterloo place.

2.10 There has been a slight decrease in the number of comparison retail units in the city centre since 2018; again this is slightly below the UK benchmark (4% below benchmark). National retailers have gravitated to the Foyle side and Richmond shopping centres with the primary retail frontage dominated by local independent comparison retailers. The main change for comparison retailers can be found in Foyle side

shopping centre with new additions replacing comparison store closures such as the closure of Topshop (& Easons) now being replaced by Waterstones book store and Debenhams now being replaced by House of Frasers. Charity stores are located through the primary retail frontages areas including Shipquay Street, The Diamond, Bishop Street and Ferryquay Street.

2.11 There has been an increase in the number of retail service units within the city centre. The number of retail service units (49.33%) is more than 10% above the UK benchmark figure of 38.54%. There are a number of new coffee shops, restaurants, cafés and public house provision located throughout the city centre but concentrated along Custom House Street, Lower Clarendon Street, Waterloo Street and Foyle Street.

2.12 The vacancy rate (13.7%) has decreased since 2018 though it remains slightly above the UK benchmark for vacant units (12.2%). Vacancy is pepper-potted throughout the town centre – Further detail below. There is also a prevalence of charity shops, suggesting that a number of units are operating on short-term leases and at suppressed rates.

2.13 The 2018 Health Check survey recorded 122 no. retail units in the ‘Waterside’ (Duke Street and Spencer Road) area of the DAP 2011 ‘commercial core’ with the following breakdown:

- 7 no. convenience (5.74%)
- 28 no. comparison units (22.95%)
- 58 no. retail service units (47.54%)
- 29 no. vacant units (23.77%)

There is no historical data for comparative analysis of the 2018 survey results. The dominant retail use in this area of the city is local comparison retailing and retail service provision.

2.14 The 2021 Health Check survey recorded 116 no. retail units in the ‘Waterside’ (Duke Street and Spencer Road) area of the DAP 2011 ‘commercial core’ with the following breakdown:

- 3 no. convenience units (2.58%)
- 26 no. comparison units (22.41%)
- 63 no. retail service units (54.31%)
- 24 no. vacant units (20.68%)

2.15 In comparison to 2018 retail figures, there has been little change, with local comparison retailing and retail service provision remaining the dominant retail use. There has been a reduction in retail units, due to the change of use from retail units to apartments which can be found along Spencer Road. There has been a 7% increase in retail services with additional café/coffee shops opening. There has also been a 3% reduction in vacant units and a 3% fall in convenience units.

Vacancy Rates

2.16 A comparison exercise was undertaken reviewing the vacant units located through the city centre ‘Table 1.2 Location of Vacant Units Comparison 2018 – 2021’ details the number of vacant units in the respective city centre area detailed in the 2018 report and results from the review in 2021.

Table 1.2 Location of Vacant Units Comparison 2018 – 2021 Derry City Centre.

City Centre Street / Area	No. Vacant Units 2018	No. Vacant Units 2021
Foyle Street	7 no. units	1 no. units
Strand Road	10 no. units	6 no. units
Shipquay Street	10 no. units	9 no. units
Castle Street	3 no. units	2 no. units

Magazine Street	1 no. units	0 no. units
Butcher Street	1 no. units	0 no. units
The Diamond	1 no. units	1 no. units
Bishop Street	3 no. units	3 no. units
Pump Street	1 no. units	2 no. units
Ferryquay Street	2 no. units	4 no. units
Carlisle Road	12 no. units	8 no. units
Bridge Street	2 no. units	3 no. units
William Street	3 no. units	3 no. units
Sackville Street	3 no. units	6 no. units
Great James Street	3 no. units	6 no. units
Quayside Shopping Centre	2 no. units	1 no. units
Richmond Shopping Centre	1 no. units	5 no. units
Foyleside Shopping Centre	3 no. units	2 no. units
Millennium Forum	3 no. units	0 no. units
Total	71 no. units	62 no. units

2.17 The following key issues are noted in relation to vacant units and the city centre:

- The former Austin's Department store site is a high profile vacant unit on Ferryquay Street / The Diamond
- There is a proliferation of vacant units along Strand Road, Shipquay Street and Carlisle Road that undermine the vitality of these locations and detract from the attractiveness of the retail shopping environment (but note the recent falls in vacancies in those areas);
- Vacancies have increased in two of the three shopping centres located in the city centre.

2.18 The vacancy rate in the Waterside area of the commercial core was previously above both UK and NI average; Table 1.3 details the location of the vacant units in the Waterside area:

Table 1.3 Location of Vacant Units Comparison 2018 – 2021 Derry City - Waterside.

City Centre Street / Area	No. Vacant Units 2018	No. Vacant Units 2021
Duke Street	6 no. units	5 no. units
Spencer Road	23 no. units	19 no. units
Total	29 no. units	24 no. units

2.19 There are a number of vacant units along Spencer Road with a notable cluster of units at the junction with Moore Street. Whilst there is still a high number of vacancies in the Waterside area, the number of vacant units has decreased slightly.

Charity Shops

2.20 The 2018 health check study identified a total of 14 no. charity shops, with 11 being within the primary retail frontage area along Bishop Street, Strand Road, William Street, The Diamond and Ferryquay Street. There were 3 charity shops identified in the Waterside area.

The 2021 health check study saw a decrease in the number of charity shops from the 2018 survey. The 2021 survey identified a total of 12 no. charity shops. 9 of them were within the primary retail frontage area and there remained 3 charity shops identified in the Waterside area.

Retail Representation

2.21 The retail representation has a significant comparison multiple retail presence in the city centre. There are a number of identified national comparison units in the city centre, with the remainder being local independent comparison retailers. National multiple retailers are primarily located within the existing shopping centres (Foyleside and Richmond Centres) which offer a variety of comparison retail provision including Waterstones, House of Fraser, Sports Direct, H&M and Marks and Spencers. There are notable comparison multiple retailer absences from the city centre from the previous survey including Debenhams, Topshop / Topman, Easons and Pandora.

2.22 The city centre convenience multiple retailer provision includes Marks & Spencer and Iceland (Foyleside), and Tesco at Quayside are the primary multiple convenience retailers in the central area, with Sainsbury's on Strand Road located outside the designated central area. There is also an under-representation of national retail service multiples, through the opening of Nandos at the Richmond Centre is a high profile addition to the independents-dominated market.

2.23 The retail provision in the Waterside is characterised by local independent retailers with the exception of some multiple retailers such as O2 (comparison retail), Day Today (convenience retailing) and Domino's Pizza (retail service).

3.0 A1. Lisnagelvin District Centre Health Check

Overview

3.1 Lisnagelvin is located outside the Central Area of Derry near the Altnagelvin roundabout, approximately 1.5 miles from the city centre. The Derry Area Plan 2011 recognised Lisnagelvin as a 'District Centre' (in line with the previous Plans of 1975 and 1981), albeit the precise boundaries are currently undefined.

Vacancy Rates

3.2 There were 6 no. vacant units in the District Centre in the 2018 health check study, this represented almost 25% of the total number of retail units at the centre.

3.3 There were 3 no. vacant units in the District Centre during the 2021 health check study, this represented a 50% decrease in vacant units from the previous survey. Three units had been since occupied by Toy Town, Lynas Food and Luxe Extensions and Tanning.

Charity Shops

3.4 At the date of the visit there were no charity shops located within the Lisnagelvin District Centre.

Retailer Representation

3.5 The shopping centre has noted national multiple retailer presence including Tesco (convenience) and Lloyds Pharmacy (comparison), whilst the retail park has the three key nationals, Next, TK Maxx and Matalan.

4.0 A2. Northside District Centre Health Check

Overview

4.1 Northside District Centre is located within the Shantallow district in the north of the city, a predominantly residential area. It is accessed primarily off Glengallagh Road, with pedestrian / cycle links allowing access from the Bradley Park residential area to the north, the library and youth centre to the east, and the church and school to the south.

4.2 The District Centre comprises Northside Village Centre a covered shopping mall anchored by a SuperValu supermarket. Surface car parking is located at the main entrance adjacent to Glenallagh Road, and at the rear accessed off Village Lane.

4.3 The precise boundaries of the District Centre are currently undefined. For the purpose of this health check, we have defined the District Centre as comprising only the Northside Village Centre, however this could potentially be expanded to include the adjacent library, youth centre and nearby church.

Vacancy Rates

4.4 There were no vacant units evident during the 2018 health check study, indicating that the District Centre was performing well, and benefits from a vacancy rate significantly lower than the NI average. The 2021 health check survey revealed that there was one vacant unit.

Charity Shops

4.5 During the 2018 health check survey there were no charity shops located within the Northside District Centre. In 2021 at the date of the visit there was one charity shop located within the Northside District Centre.

Retailer Representation

4.6 Northside includes two national multiple retailers – Supervalu and Winemark. The Supervalu also included a branch of the Post Office. Independent retailers located within Northside comprise a beauty salon, barbers, opticians, butchers, two gift shops, a pharmacy, café and a charity shop. Food shop provision within Northside is provided by the SuperValu store.

5.0 A3. Rath Mór District Centre Health Check

Overview

5.1 Rath Mór is located to the west of the city centre. It is accessed off Eastway and Bligh's Lane, via Brickfield Court. The District Centre comprises the Rath Mór Shopping Centre, a covered shopping mall anchored by a Costcutter superstore, an associated car park located to the east of the shopping centre itself.

5.2 The District Centre is located to the west of the associated Rath Mór Business Park, and to the north of St John's Primary School and St Cecilia's College. To the north, across the Eastway is a predominantly residential area.

5.3 The precise boundaries of the District Centre are currently undefined. For the purposes of this health check, we have considered the District Centre as comprising only the Rath Mór Shopping Centre.

Vacancy Rates

5.4 The 2018 health check study identified that there were no vacant units evident, indicating that the District Centre is performing well, and benefits from a vacancy rate significantly lower than the Northern

Ireland average. This trend was evident again during the 2021 health check survey as it revealed there were no vacant units.

Charity Shops

5.5 During the 2018 health check study, Rath Mór included one charity shop, the NI Children's Hospice shop. This shop was still operational during the 2021 health check survey.

Retailer Representation

5.6 Rath Mór includes only one national multiple, the Eurospar superstore, however this also included a branch of the Post Office.

5.7 Independent retailers made up the majority of the remaining occupiers of the District Centre and comprised a salon, beauticians, florist, pharmacy, café and variety shop.

6.0 A4. Springtown District Centre Health Check

Overview

6.1 Springtown District Centre is located at the junction of Aileach Road / Northland Road in the north west of Derry. The District Centre is enclosed by residential areas to the north, south and west, to the east is the Springtown industrial, business and technology estate. Surrounding uses also include a primary school.

6.2 The District Centre comprises two distinct parts, the first comprising a covered shopping mall, known as Springtown Shopping Centre, anchored by a large Dunnes Store with extensive surface car park wrapping around the Shopping Centre's north and west elevations. The second part comprises a small strip of smaller units on the site of a former petrol filling station fronting, and primarily accessed from Northland Road with a separate small car park located in front of the units. The precise boundaries of the District Centre are currently undefined.

6.3 For the purposes of this health check, we have assumed the District Centre to include the Shopping Centre (incorporating the Dunnes Store), small strip of units incorporating the bar / restaurant, in addition to the Church and the Pennyburn Credit Union building on Aileach Road.

Vacancy Rates

6.4 The 2018 health check study identified that the vacancy rate of the District Centre is heavily affected by the Springtown Shopping Centre lying virtually empty. The small strip of shops off Northland Road only had one vacant unit. The situation remains largely the same with the small strip of shops off Northland Road now having no vacancies.

Charity Shops

6.5 At the date of the visit, there were no charity shops located within the Springtown District Centre.

Retailer Representation

6.6 Springtown currently hosts three national multiple retailers in the form of Dunnes Stores, Winemark and a Spar convenience store.

6.7 Independent retailers located within Springtown comprise Molly Malones Bar and associated off-licence, Bradley's Pharmacy, Butties Fish and Chips Shop, Stairway Barbers and Shake 'n' Frappe.

6.8 Food shop provision within Springtown is provided by the Spar convenience store, which offers a primarily top-up shop offer. The Dunnes Store serves as a main food shop destination whilst also providing

complementary range of comparison goods as part of a mixed retail offer, with convenience retailing representing around 40% of the Dunnes floor space.

7.0 A5. Crescent Link - Other Retail Centre Health Check

Overview

7.1 Crescent Link Retail Park is an out-of-town retail park located in the south eastern periphery of Derry. It is located off the Crescent Link Road, hence the retail park's name and is located 3 miles from the Derry City Centre. It is a large retail park, with a large representation of multi-national retailers, such as Marks & Spencer's, Homebase and Curry's PC World.

7.2 The first phase was built to the northern side of the development, which saw 10 units built in the early 2000's. These units' house both established Derry stores and stores new to the city. The second phase saw the development expand to the southern reaches of the site, with the further addition of eight units.

Vacancy Rates

7.3 The Crescent link 'other retail centre' was not surveyed in 2018. In the 2021 health check survey, there were four vacant units identified at the Crescent Link site.

Charity Shops

7.4 At the date of the visit, there were no charity shops located within the Crescent Link other retail centre.

Retailer Representation

7.5 Crescent link hosts a number of National multiple retailers including Sports Direct, Boots, Next Home, B&M Bargains and Homebase among others.

7.6 Food shop provision within Crescent Link is provided by the Marks & Spencer's which offers a main food shop destination. Other retail offerings include B&M which serves as mainly comparison goods as part of a mixed retail offer with top-up shop offering a small percentage of the store.

8.0 B1. Strabane Town Centre Health Check

Overview

8.1 The Regional Development Strategy (RDS) 2035 identifies the settlement of Strabane as a Main Hub in the North-West. Strabane provides an important retail and commercial function for the hinterland and surrounding smaller rural settlements. Strabane is located on the RoI border, less than 0.5km, from the neighbouring settlement of Lifford located in RoI.

8.2 The 'Strabane Area Plan 2001' designated a 'town centre limit.' The town centre limit covers an extensive area and consists of a traditional core focused on Main Street, Castle Street and Abercorn Square, together with the relatively modern retail developments (ASDA, Pavilion and Lesley Retail Parks) which have developed on the periphery. Abercorn Square is accepted as the focal point of the town centre from which the principal shopping streets radiate. Abercorn Square, Castle Street, Market Street, Main Street and the eastern end of Railway Street are the principal shopping areas while the remainder of Railway Street, Butcher Street, Castle Place and the central part of Main Street have a lesser retail significance.

Health Check Assessment – Existing Town Centre Uses

Diversity of Uses

8.3 The health check assessment reviewed data provided in 2016 Experian GOAD Centre Report (Sept 2016) and March 2018 health check in comparison to 2021 health check figures, which can be identified in the table below. The total units counted were 212 which has increased by 2 units since 2018, the diversity of use has also changed slightly over the last few years.

Table 1.4 Diversity of Uses Strabane Town Centre by number of Units- Change from 2016 to 2021

Use	GAOD 2016 Strabane Town Centre	2018 no. of Units	2021 no. of Units	Change from 2018-2021
Convenience	11	10	2	-8
Comparison	76	74	56	-18
Retail Service	54	85	118	+33
Vacant Units	23	41	36	-5
Total No.	163	210	212	0

Table 1.5 Health Check Strabane Town Centre – Diversity of Uses

Retail Trade Group	2021 no. of units	%	% UK Average
Convenience	2	0.95	9.6
Comparison	56	26.66	38.38
Service	118	56.19	38.54
Vacant	36	16.98	12.24

8.4 The total number of retail services has stayed the same however there has been slight changes within the individual trade groups. Retail service units remains the highest with a percentage of 56% (UK

average is 38.5%). Convenience and comparison use have decreased and fall below the UK bench mark. The vacancy rate within the town centre exceeds the UK benchmark by 4.5%.

Traditional Town Centre

8.5 Within the traditional town centre, comparison and service retail is dominated by local independent retailers. Dv8, Boots and Dreamland Beds add to the comparison figures, attracting footfall to the main street.

8.6 There are a low number of convenience retailers trading in the traditional town centre including Supervalu situated on Main Street and Iceland located on Railway Street. The stores are without dedicated parking and the majority of parking within the town centre is pay and display. Although vacancy rates have dropped since 2018, vacant units are still higher than figures of 2016 GOAD survey; however as stated in the 2018 report, this can be largely accounted for as the health check assessment encompasses town centre outer lying areas for example along Derry Road, Dock Street, and Barrack Street which had been included in the 2016 GOAD survey.

8.7 The large proportion of retail service units (approx. 56.19%) illustrates that the town centre performs an important service role. There are numerous pubs and cafes along Castle Street, Castle Place and Market Square with a strong presence of hairdressers' and beauty parlours in the town centre. There is limited office provision in the town centre.

8.8 Residential units are pepper-potted throughout the town centre with established residential communities on Patrick Street, Derry Road, Upper Main Street, Barrack Street and Lower Main Street. The bus station is located outside the town centre along Bradley Way beside the Lidl store. The Alley Arts Theatre and Conference Centre and the library combine to provide leisure and cultural offer in the town centre, diversifying the range of town centre land uses.

ASDA and Retail Parks

8.9 The profile and the range of retail on offer at Lesley Retail Park and the ASDA store differs significantly from the traditional town centre offer. The ASDA store is a large, modern destination convenience retail store, prominently located off the A5 roundabout, visible for locals and cross border traffic. During the health-check, it was observed that the ASDA car park was largely occupied throughout the day. The neighbouring Pavilion retail units offer complementary convenience and comparison retailing with dedicated car parking. Lesley Retail Park (constructed in 2009) provides comparison retailing in modern retail units with dedicated car parking.

Vacancy Rates

8.10 In the 2018 health check study, it was noted that vacancy was apparent throughout the traditional town centre core, in particular along Castle Place, and to a lesser degree Abercorn Square and Castle Street. Main Street had a high proportion of occupancy with minimal recorded vacancy; however that situation deteriorated along Upper Main Street where vacancy became more of an issue (8 no units recorded vacant). There were prominent vacant units at John Wesley Street (adjoining Railway Street) and along Derry Road within the study area. Lesley Retail Park was fully occupied and there were two vacant units at the Pavilion Retail Park.

Table 1.6 Location of Vacant Units 2021 Strabane Town Centre

Town Centre Street / Area	No. Vacant Units 2021
Main Street	15 no. units
Castle Place	4 no. units
Abercorn Square	4 no. units
Castle Street	2 no. units
John Wesley Street	2 no. units
Railway Street	5 no. units
Derry Road	1 no. unit
Church Street	1 no. unit
Butcher Street	1 no. unit
Pavilion Retail Park	1 no. unit
Lesley Retail Park	0 no. Units
Total	36 no. units

8.11 Vacancy rates have decreased in Strabane Town Centre since 2018. They have decreased from 41 units in 2018 to 36 units in 2021. Although vacancy rates have dropped since 2018, vacant units are still higher than figures of 2016 GOAD survey. However, as stated in the 2018 report, this can be largely accounted for as the health check assessment encompasses town centre outer lying areas for example along Derry Road, Dock Street, and Barrack Street which had been included in the 2016 GOAD survey.

8.12 The largest area of vacancy can be found along Strabane’s Main Street with a total of 15 units; other areas of high vacancy can be found along Castle Place (4 units) and Abercorn Square (4 units). As well as vacancy, there is a large derelict site along Strabane Main Street across from Harry Corry’s. Lesley Retail Park remains fully occupied and Pavilion Retail Park vacancy has decreased by one unit.

Charity Shops

8.13 Two charity shops were noted in the 2021 survey for Strabane but there is no data for previous years.

Retailer Representation

8.14 Strabane has a strong multiple retailer presence in the Lesley and Strabane retail parks with comparison retailers such as Argos, Menarys, Peacocks, New Look, Sports Direct and Poundland. The comparison retail provision in the town centre is primarily independent but there are also multiple retailers present, for example: Boots; DV8; Harry Corry and O2 located on the Main Street and Castle Place.

8.15 Multiple convenience retailers ASDA, Iceland Frozen Food and SuperValu are located in the town centre, though ASDA is the only convenience store with dedicated car parking. The remainder of the convenience retail market comprises local independent retailers.

9.0 B2. Melmount Road ‘Other Retail’ Centre Health Check

Vacancy Rates

9.1 The Melmount Road ‘Other Retail’ Centre was not surveyed in 2018. In the 2021 health check survey, there were no vacant units identified.

Charity Shops

9.2 At the date of the visit, there were no charity shops located within the Melmount Road Other Retail Centre.

Retailer Representation

9.3 Retailer provision at the Melmount Road Other Retail Centre includes Home Bargains and Lynas Food Outlet and an off licence along with a number of food / coffee trucks located onsite.

10.0 C. Castlederg Health Check

Overview

10.1 Castlederg has a population of 2,976 (Census 2011). The Strabane Area Plan (SAP) 2001 designated the settlement as a 'town'. The SAP designated a compact town centre limit which extends northwards from the river to include Main Street, part of Lower Strabane Road, Meetinghouse Land, The Diamond, William Street, John Street, High Street, Priests Lane and Ferguson Crescent. The health check study focused on the SAP town centre limit having regard to the surrounding areas.

Vacancy Rates

10.2 The 2018 health-check survey identified seven vacancies within the town centre. Notable high profile vacancies include the Ulsterbank building along the Main Street and the 'W.J Arcade Building' on the Diamond. The 2021 health check survey seen an increase to 9 vacant units from the previous 2018 survey.

Charity Shops

10.3 During the 2018 health check study, Castlederg included two charity shops. During the 2021 survey, it was noted that one of the charity shops had closed and only one remains operational and is located in the Diamond.

Retailer Representation

10.4 With the exception of the noted convenience retailers, Co-operative food store, VivoExtra and Spar, the retail provision in the town centre is dominated by local independent traders.

11.0 D. Newtownstewart Health Check

Overview

11.1 Newtownstewart is located approximately ten miles north of Omagh and ten miles south of Strabane located on the banks of the River Mourne. The population of the settlement was recorded as 1,551 persons within the last Census (2011). The settlement was designated as a town in the Strabane Area Plan 2001, through the Plan did not designate a town centre limit. In the absence of a town centre designation, the health check assessment focused on the core of the settlement including Main Street, Townhall Street, St. Eugenes Street and Castlebrae Road.

Vacancy Rates

11.2 The 2018 town health check survey identified six vacant units within the town centre area. Of particular note was the vacant Northern Bank building on Main Street, which has now been occupied by a local optician. The 2021 health check survey noted a decrease in the number of vacant units from six (2018) reduced to three (2021) vacant units. This has seen the introduction of a barbers, beauty salon and the relocation of an opticians to the former Northern Bank building.

Charity Shops

11.3 During the 2018 health check study, Newtownstewart included one charity shop, Cancer Focus (Charity Shop). This shop was still operational during the 2021 health check survey.

Retailer Representation

11.4 Retailing provision in the town centre is primarily local independent convenience and comparison with the Centra and Nisa being the only multiple presence in the centre. There is a Spar convenience shop in the town though it is located away from the centre of the town, along Strabane Road, approximately 300 metres from the Main Street and with dedicated parking.

11.5 Newtownstewart town centre makes provision for local comparison and convenience retailing. It offers an historic ambience though the traffic through the centre undermines the public realm environment.

12.0 E. Claudy Health Check

Overview

12.1 Claudy is located approximately 16km south east of Derry City. The settlement has a population of 1,340 persons (Census 2011). Claudy was designated as a 'village' in the Derry Area Plan 2011 and a village centre was not defined by the Plan. The DCSDC LDP draft Plan Strategy (December 2019) has proposed designating Claudy as a 'local town' in the District settlement hierarchy. In the absence of a defined centre designation, the health check study concentrated on the main thoroughfares in the centre, namely Main Street, Church Street and Barnailt Road.

Vacancy Rates

12.2 The 2018 town health check survey identified four vacant units along Main Street, though the units were interspersed along the street. The former Northern Bank Building (Listed) on Church Road was a high profile vacant unit within the town centre area. The 2021 health check survey revealed a decrease in the number of vacant buildings, when surveyed; there are now three vacant units in Claudy.

Charity Shops

12.3 At the date of the visit, there were no charity shops located in Claudy.

Retailer Representation

12.4 Retailer provision in the town centre is primarily local independent convenience and comparison, with the Centra, Day Today, Spar and Lloyds Pharmacy being the only multiple presence in the centre.

13.0 F. Sion Mills Health Check

Overview

13.1 Sion Mills is located two miles south of Strabane and is located immediately to the west of the River Mourne. Sion Mills has a population of 1,907 persons (Census 2011). It was designated as a 'town' in the Strabane Area Plan 1986-2001 though the Plan did not identify a town centre boundary. The DCSDC LDP draft Plan Strategy (December 2019) has proposed designating Sion Mills as a 'Village' in the District's settlement hierarchy. However, it is included in this study of 'towns' because of its current status and in case it remains designated in the final LDP. In the absence of a defined town centre designation, the health check survey concentrated along the A5 which runs through the settlement core and comprises several small nodes of business rather than an obvious 'centre'.

Vacancy Rates

13.2 Vacancy was not identified as an issue during the 2018 and 2021 health check survey.

Charity Shops

13.3 At the date of the visit, there were no charity shops located in Sion Mills.

Retailer Representation

13.4 There was a limited convenience and comparison retail provision in Sion Mills. Spar is the noted retail multiple in the centre, as well as a Mace at the petrol filling station and a Lloyds Pharmacy.

14.0 G. Eglinton Health Check

Overview

14.1 Eglinton is located in close proximity to Derry and has a population of 3,679 (Census 2011). The settlement was designated as a 'village' in the Derry Area Plan 2011, and as such, the Plan did not designate a village centre boundary. The DCSDC LDP draft Plan Strategy (December 2019) has proposed to designate Eglinton as a 'village' in the District settlement hierarchy. However, there have been requests for its inclusion as a local town and hence it is included in this study of 'towns', to aid this consideration, in case it is designated in the final LDP. In the absence of a defined village centre boundary, the health check study concentrated on the established village core area of Main Street.

Vacancy Rates

14.2 Vacancy was not identified as an issue during the 2018 and 2021 health check survey.

Charity Shops

14.3 At the date of the visit, there were no charity shops located within Eglinton.

Retailer Representation

13.4 Retailing provision is primarily local service, comparison and convenience. SuperValu supermarket and Spar are the noted multiples in the village.

15.0 Conclusions on Health Check Occupancy Assessments

15.1 In summary, the main conclusions for each centre are set out below:

- It is important to consider the impact of Covid-19 on the retail offering within Derry City and Strabane District, as recent studies carried out in comparable cities in the UK have revealed that fashion retailers rather than pubs and restaurants were the hardest hit by the pandemic. It is also thought that high streets in 'economically weaker' cities have been less affected by Covid-19. In Derry City Centre, there has been a new lease of life added through the additional coffee shops/cafés (with expanded or new continental style outdoor seating) and some falls in vacancy rates (albeit still slightly above the UK average).
- Derry City Centre has a good representation of national retailers within the main shopping centres, though there is notable absence, with the exception of Primark, on the traditional streets. There are a notable number of national retailers not represented in the city centre. The number of convenience stores within Derry city centre is now well below the national average. Comparison stores and retail services are closer to / above the national average (4% below the average for comparison and 10% above for retail service.) Derry City Centre has a good range of non-retail attractions / uses within the city centre such as the Historic Walls, the Guildhall, Museums and Theatres. Vacancy rates have decreased since the previous survey and the District and other retail centres are performing well. The Richmond Centre, one of the shopping centres has recently been bought over by a local property group who 'aim to revitalise it by filling vacant units and improving the façade of the building' – this will hopefully have a positive impact on the future retail offering within the City Centre following the loss of a number of notable retailers e.g. Debenhams, Topshop, Easons, etc. as well as the Austins store.
- Strabane Town Centre has two distinct areas of retailing, with the traditional town centre largely made up of independent retailers, with a smaller national presence. The edge of (within the) centre retail parks are dominated by Asda, as well as other nationals such as Argos, Sports Direct and New Look. Strabane town centre has a lower than average convenience offering and a comparable offering in terms of comparison and retail services. Vacancy rates have remained the same since the last health check survey. Strabane Retail Park has recently seen planning approval granted for a new Lidl supermarket though works have not yet started; this will increase the offerings of the existing Lidl and see £8.5 million investment into Strabane Town, though there is uncertainty about whether the existing retailers (Argos, New Look, etc.) will re-locate in the town.
- In relation to the other settlements where health checks were carried out, the diversity of uses is strongest in Castlederg, with a good range of independents, retail services and convenience stores. Of the other settlements, Claudy, Newtownstewart and Eglinton have a similar offer, with Sion Mills having a more limited range and diversity of uses. Each settlement has seen a decrease in vacancies since the last survey.

15.2 These qualitative assessments are now fed into the Evidence Base, as required by SPPS in paragraph 6.285. The findings will assist in forming the proposals and policies within the LDP and will also provide an update from the baseline for the ongoing Monitoring of the town centres in the years ahead.

