DPS029

Belfast Retail & Leisure Capacity Study 2035

Prepared by Braniff Associates
on behalf of Belfast City Council

Sep 2017

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RETAIL AND LEISURE CAPACITY STUDY FOR BELFAST 2035

- EXECUTIVE SUMMARY

This Retail and Leisure Capacity Study for Belfast has been prepared in order to inform the contents of the new Local Development Plan 2035 (LDP) for the City Council. The Study provides guidance on the capacity for new retail and leisure development in Belfast, as well as strategic and operational advice relating to the scale, nature and location of this development in the foreseeable future.

In the interest of sensitivity testing and incorporating flexibility into the assessment, the capacity for additional retail and leisure development is estimated on the basis of population projections in the Local Development Plan (LDP) and on the basis of low population forecasts by NISRA. Accordingly, the capacity range for additional retail floorspace in Belfast is outlined below.

Between 2017 and 2035 the projected levels of available expenditure on convenience goods equate to a floorspace requirement of between 1,348 net sqm and 11,887 net sqm. Based on existing store sizes the latter figure can be interpreted as capacity for up to 6 food superstores.

Growth in available expenditure on comparison goods, including bulky durables, during the same period is estimated to be more substantial and translates into a floorspace capacity for 63,519 net sqm to 98,336 net sqm. Ideally, part of this capacity should be absorbed by the occupation of vacant units in Belfast City Centre, which according to GOAD amounts to at least 29,000 net sqm. This relatively high level of vacancy in the primary retail area of Belfast, accounting for 18% of units, has remained the same for the past decade and more.

In terms of projected growth in available expenditure on leisure service uses this is estimated to exceed that figure for convenience goods and range between £209m and £325m between 2017 and 2035. Based on existing spending patterns, nearly two thirds of this expenditure growth will specifically fuel demand for additional restaurant, cafe and takeaway space.

Linked to the above points, the results of the assessment indicate that there is sufficient capacity to accommodate another Department store-anchored retail and leisure scheme in the heart of Belfast City Centre. Retail analysts predict that such projects will be more modestly sized than before and will comprise a greater proportion of leisure service uses.

Compared to other major cities Belfast is under-represented in its accommodation of prestigious retail chains. Therefore, an element of this capacity for additional retailing should be targeted at attracting firms not currently trading in the City, thereby enhancing the range and choice of shopping available to consumers. In so doing, it would bolster the profile of Belfast as a “major city” shopping destination and improve its retail ranking of 18th out of 22 major cities in the UK. It had previously been ranked 14th in 2008 with the opening of Victoria Square.

While the findings of this assessment demonstrate that Belfast will have appreciable capacity to add to its retail and leisure service sectors over the period of the plan, it is recognised that economic conditions and market forces will largely determine how much retail and leisure floorspace will be built in the City in the coming years. This notwithstanding, the findings of this Capacity Study are intended to assist the Council in planning for such development.

Braniff Associates
September 2017

SECTION 1: INTRODUCTION

1.0 Introduction

This Retail & Leisure Capacity Study has been prepared by Braniff Associates at the request of Belfast City Council (BCC). It was commissioned by the Council in order to obtain a robust, evidence-based understanding of shopping and leisure activity in the area so that it can better plan for these uses in the Local Development Plan 2035 (LDP). The preparation of the Study is particularly aimed at informing the LDP strategy and policy for these uses.

1.1 Scope of Study – Terms of Reference

The Brief required the completion of a retail and leisure capacity assessment for Belfast City Council over a four month period from June 2017 to September 2017. The specific stages of work listed in the Council's terms of reference are outlined below:

- Stage 1 - Review Policies, Market Trends and Case Studies
- Stage 2 - Retail and Leisure Capacity Assessment – survey & health checks of existing retail and leisure hierarchy
- Stage 3 - Assessment of the Requirement for Additional Retail and Leisure Floorspace
- Stage 4 - Policy Guidance

1.2 Structure of Report

Within the context of the above, the Retail and Leisure Capacity Study consists of the following sections:

- Section 2 outlines the planning background to the Study.
- Section 3 provides a health check overview of the existing retail environment.
- Section 4 provides a health check overview of the existing leisure services sector.
- Section 5 details the findings of the household shopper survey carried out for this Study.
- Section 6 examines the quantitative and qualitative need for additional retail floorspace.
- Section 7 assesses the capacity for development in the leisure services sector.
- Section 8 reviews the future outlook for the retail and leisure services sectors in Belfast.
- Section 9 considers the key findings from this capacity assessment and suggests recommendations for strategic and operational guidance.

SECTION 2: PLANNING CONTEXT

2.0 Introduction

In order to obtain a full appreciation of the planning background to the Retail and Leisure Capacity Study a range of documentation and information was consulted. Examination of this material also allowed for a broad understanding of the economic development context to the Study. The documentation included the following:

- Strategic Planning Policy Statement 2015
- Development Plan Practice Note on Soundness, May 2017
- Regional Development Strategy for Northern Ireland 2035
- Belfast Local Development Plan 2020-2035 – Preferred Options Paper
- Belfast Agenda – Belfast Community Plan 2035
- Corporate Plan for Belfast City Council 2017-21 (Incorporating 2017-18 Improvement Plan)
- Belfast Metropolitan Area Plan 2015
- Belfast Metropolitan Area Plan Retail Study 2003 & Update 2006
- Belfast Urban Area Plan 2001
- Belfast City Centre Retail Positioning Study 2015, Deloitte
- Town Centres and Retailing Research Project, GL Hearn Report, DOENI, January 2014
- Assessing Employment Space Requirements across the City 2015-2030, Paper by Ulster University Economic Policy Centre, September 2016
- Belfast City Centre Regeneration and Investment Strategy 2030
- The Belfast Integrated Tourism Strategy 2015-2020
- Various Masterplans, Frameworks and Strategies for Belfast
- Renewing the Arterial Routes programme
- BID One initiative
- Investment Fund

Much of this documentation has been addressed in the Retailing and City Centre supplement accompanying the LDP Preferred Options Paper. In order to avoid needless duplication, its relevance to the Retail Study will be succinctly referred to here.

2.1 Strategic Planning Policy Statement 2015

Published in September 2015 the Strategic Planning Policy Statement 2015 (SPPS) is unambiguous in stating that "*Planning authorities <u>must adopt a town centre first approach</u> for retail and main town centre uses*." Para 6.273

To this end paragraph 6.271 outlines the following regional strategic objectives for town centres and retailing:

- 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 (LDPs) and when decision-taking;
- ensure LDPs and decisions are informed by robust and up to date evidence in relation to need and capacity;
- protect and enhance diversity in the range of town centre uses appropriate to their role and function, such as leisure, cultural and community facilities,
- 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.

The specific requirement for the preparation of this Study stems from paragraph 6.274 of the SPPS. It states that "*In preparing LDPs <u>councils must undertake an assessment of the need or capacity</u> for retail and other main town* *centre uses across the plan area. Councils must also prepare town centre health checks and regularly review these (preferably at least once every five years)."*

The SPPS makes it clear that the Local Development Plan (LDP) must be supportive of the City Centre.

"*LDPs should include a strategy for town centres and retailing, and contain appropriate policies and proposals that <u>must promote town centres first</u> for retail and other main town centre uses*." Para 6.275, SPPS

A similar approach is advised in the SPPS for existing district and local centres.

"*Planning authorities should retain and consolidate existing district and local centres as a focus for local everyday shopping, and ensure their role is complementary to the role and function of the town centre. In these centres, extensions should only be permitted where the applicant has demonstrated that no adverse impact will result on town centres in the catchment.*" Para 6.276, SPPS

Also of relevance to the Study is the SPPS recommendation (Para 6.277) to include the following in a LDP.

"*LDPs should also:*

- *<u>define a network and hierarchy of centres</u> - town, district and local centres, acknowledging the role and function of rural centres*;
- *<u>define the spatial extent of town centres and the primary retail core</u>;*
- *<u>set out appropriate policies</u> 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*;
- *<u>provide for a diverse offer and mix of uses</u>, which reflect local circumstances; and*
- *<u>allocate a range of suitable sites</u> to meet the scale and form of retail, and other town centre uses."*

2.2 Development Plan Practice Note on Soundness, May 2017

This Retail and Leisure Study is also prepared in recognition of the coherence and effectiveness test (CE2) on the soundness of a LDP (p4, Development Plan Practice Note on Soundness, May 2017). It advises that the strategy, policies and allocations of the LDP should be *"realistic and appropriate" and "<u>founded on a robust evidence base</u>*".

2.3 Regional Development Strategy for Northern Ireland 2035

One of the 8 aims of the Regional Development Strategy (RDS) for NI is to specifically "*Strengthen Belfast as the regional economic driver and Londonderry as the principal city of the North West*".

Within this context, an element of the Strategic Framework guidance (SFG3) for the Belfast Metropolitan Area is to "*Enhance the role of Belfast City Centre as the regional capital and focus of administration, commerce, specialised services and cultural amenities*".

In expansion of this guidance the RDS seeks to "*Support and strengthen the distinctive role of Belfast City Centre as the <u>primary retail location in Northern Ireland</u>."* It continues *"Belfast City Centre has developed its regional shopping offer. A precautionary approach needs to be continued in relation to future major retail development proposals based on the likely risk of out of centre shopping developments having an adverse impact on the city centre shopping area*."

2.4 Belfast Local Development Plan 2020-2035 – Preferred Options Paper

In keeping with the SPPS the Preferred Options Paper highlights the requirement to identify and demarcate the boundaries of the retail hierarchy within Belfast. It also recognises that retail planning is one element of a multifaceted approach to City Centre development. The other key strands chiefly pertain to office, educational, residential, leisure and tourism development.

Clearly, significant development in other sectors of the City Centre will have positive ramifications for the retail and leisure sectors. This is especially the case with the new university campus being constructed at York Street, which will attract 15,000 students to the City Centre (Figure 2.1). It has triggered proposals to develop student accommodation for 3,000 students. Equally, the drive to provide Grade 'A' office development in the City Centre will promote footfall levels via the accommodation of additional workers (Figure 2.2).

Figure 2.1: University campus, York Street

Figure 2.2: Construction of Grade A Offices at City Quays

In addition to the above there is significant hotel development taking shape in Belfast and this is considered in subsection 2.14 below.

2.5 Belfast Agenda – Belfast Community Plan 2035

The Belfast Agenda outlines a long term strategic framework for improving the economic, social and environmental wellbeing of the city up to 2035. Its ambitions include the accommodation of another 66,000 residents and provision of another 46,000 jobs by 2035.

2.6 Corporate Plan for Belfast City Council 2017-21 (Incorporating 2017 - 18 Improvement Plan)

It notes that the area of Belfast City Council comprises circa 18% of the population in Northern Ireland yet accounts for 31% of all jobs in the region. The Corporate Plan reiterates many of the desired outcomes and priorities expressed in the Belfast Agenda.

2.7 Belfast Metropolitan Area Plan 2015

Technically, due to a court judgement, this Plan currently has the status of being a draft document. Nevertheless, it is a valuable building block on which to formulate strategic and policy guidance for retail development under the new LDP. In this regard, it outlines the latest retail hierarchy, retail strategy and policies for Belfast.

2.8 Belfast Metropolitan Area Plan Retail Study 2003 & Update 2006

The BMAP Retail Study is a Technical Supplement to that Plan. While much of the information is out of date, reference to certain data on unit numbers and floorspace is still useful for the identification of trends.

2.9 Belfast Urban Area Plan 2001

This Plan was prepared in the mid 1980s and it allows for a long term appreciation of how planning for retail and leisure use in Belfast has evolved over the years.

2.10 Belfast City Centre Retail Positioning Study 2015, Deloitte

Deloitte was tasked with identifying retail opportunities within Belfast based broadly on comparative analysis with major cities elsewhere. Their main findings are outlined in Section 6 of this Retail and Leisure Study when considering the qualitative capacity for additional retailing in Belfast.

2.11 Town Centres and Retailing Research Project, GL Hearn Report, DOENI, January 2014

As a working paper to the preparation of the SPPS this Report carried out extensive research across Northern Ireland which included health checks of all the main towns. In this regard, it is useful for comparing the experience of Belfast with other towns in Northern Ireland.

2.12 Assessing Employment Space Requirements across the City 2015-2030, Paper by Ulster University Economic Policy Centre, September 2016

This economic research paper was prepared by Ulster University for the preparation of the Preferred Options Paper (POP). It estimated future floorspace requirements for the City based on employment density standards. This was carried out across a range of economic sectors including retailing. Its forecast for retail floorspace applied to all A1 uses (convenience goods, comparison goods, retail services) and amounted to 68,000 net sqm by the year 2030 based on an upper growth scenario.

This research stated that 12% of employment in Belfast in 2015 was associated with the wholesale and retail trade. As an indication of the primacy and resilience of Belfast City the research noted that, relative to other councils, it was the only one to create a substantial number of jobs during the post recession years 2007-2013.

2.13 Belfast City Centre Regeneration and Investment Strategy 2030

This Strategy outlines the Council’s regeneration priorities for the City Centre over the next 15 years. The Strategy identifies 5 Special Action Areas (SAAs) for detailed attention in the short term. These include the Northern Quarter, Western Quarter, North East Quarter, Transport Hub, and Oxford Street and Eastern Bank District.

2.14 The Belfast Integrated Tourism Strategy 2015-2020

According to the Belfast Integrated Tourism Strategy 2015-2020 tourism attracts 9.5 million visitors to Belfast each year. It contributes over £430 million to the local economy and supports over 9,300 full time jobs. The Tourism Strategy aims to double the annual value of tourism to £870 million by 2020. It will be helped in this regard by the level of hotel development proposed for Belfast.

Table 2.1 overleaf indicates that there are 15 hotel proposals with full planning permission to provide 1,833 bedrooms in the City. Added to these, there is outline consent for 2 hotels opposite the SSE Odyssey Arena and a Masterplan proposal for a 200-bed 4-star hotel at Queen’s Quay. Nearly all of the proposed hotels are located in the City Centre. Work has commenced on at least 7 of these. In order to appreciate the scale of this proposed development, it is worth noting that there are currently 36 hotels in Belfast, half of which are located in the City Centre.

Table 2.1

Hotel proposals in Belfast		
Address	**Proposal**	**No. of bedrooms**
24 - 40 Howard Street	Office to hotel use	81
5 Linenhall Street (Lancashire House)	Office to hotel use (Extn to Ten Sq)	46
Crumlin Road Jail	N/K	
St Andrews Sq (off Gt Vic Str)	14 Storey hotel on car park	128
108 - 110 Great Victoria Street	Demolition of Fanum House for	173
The Waring hotel, 9 - 13 Waring St	Convert to hotel and bar	37
7 - 13 Hope Street, Belfast	9 storey hotel	179
Titanic Quarter (drawing offices)	4 storey	120
Scottish Mutual building, Bedford St	Office to hotel use	79
Site of old College of Business Studies	13 storey building	206
11 - 17 Donegall Street	Office to hotel use	25
21 - 29 Corporation Street	12 storey hotel	250
9 - 15 Bedford Street, Belfast	22 storey office to hotel building	304
Donegall Quay, City Quays	9 storey hotel	188
38 - 42 Bank Street	4 storey hotel	17
	Total	**1,833**

Figure 2.3: Proposed "George Best" hotel at the Scottish Mutual Building, Bedford Street

Figure 2.4: Proposed Grand Central and Maldron Hotel

2.15 Urban Villages: EastSide Strategic Framework 2016

This study carried out a survey of local businesses on the lower Newtownards Road and Holywood Arches. Significantly, it recorded that 75 per cent of local businesses stated that their trade was average, poor or very poor, with 15 per cent intending to relocate, downsize or close over the next 5 years.

The work concluded that in order to attract shoppers to the area shop units had to be modernised, involving their enlargement and in some cases their reduction in size, in order to improve floorspace efficiency. Tailoring store size to operational requirements is sometimes referred to as "rightsizing".

2.16 Urban Villages: West Belfast Strategic Framework (2016)

Of relevance to this Retail and Leisure Study is its identification of the Dairy Farm District Centre and adjacent area as a new “Town Centre” for the Poleglass, Twinbrook, Lagmore and Kilwee neighbourhoods.

2.17 Urban Villages: South Belfast - Sandy Row, Donegall Pass and the Markets 2016

It recognises the challenges faced by shops in these areas and points to a range of options to help improve matters. These include living over the shop schemes, shopfront improvements, public realm enhancements and parking strategies.

2.18 Greater Clarendon (Sailortown) draft Masterplan, Feb 2016

It identifies land opposite the Cityside Retail and Leisure Park for retail development (footprint circa 8,000 sqm).

2.19 Belfast Inner North West Strategic Planning Framework (draft), Oct 2017

The illustrative draft Masterplan for this area suggests that the quantum of floorspace assigned to new retail, food & beverage uses could eventually amount to 25,000 gsm. The area encapsulates that part of the City Centre bounded by Millfield, Royal Avenue, Castle Street and Donegall Street.

2.20 The North Side Urban Village Regeneration Framework 2009

While its contents are in many respects superseded by the latter publication it did highlight the area behind Castle court as a location for “retail focus”.

2.21 Westside Regeneration Masterplan (2009)

This Masterplan by the Department for Social Development (DSD) proposes a ‘mixed-use quarter’ in the western part of the City Centre. The area largely encompasses that part of the City Centre bounded by Castle Street Wellington Place, College Avenue and Donegall Place. It placed an emphasis on encouraging new restaurants, cafés, bars and living accommodation, as well as strengthening the appeal of the area for independent and specialist retailers.

2.22 South Belfast Strategic Regeneration Framework (2008)

Prepared by Hyder Consulting for the South Belfast Partnership it emphasised the requirement to promote and develop the existing independent retail areas of Botanic Avenue, Stranmillis Road, Sandy Row, Ormeau Road and Lisburn Road.

2.23 Renewing the Arterial Routes Programme

Since 2004, the “Renewing the Arterial Routes Programme” has revitalised 450 commercial frontages and implemented 80 arts and landscaping projects along ten main routes in Belfast. This has assisted in improving the environmental quality of these areas.

2.24 BID One initiative

Established in October 2015 Belfast One is the business improvement district (BID) for the core of Belfast City Centre. It works in partnership with a range of bodies, including Belfast City Centre Management, Belfast Chamber of Trade and Commerce, Visit Belfast, the Department for Communities and Belfast City Council. Its overriding aim is to enhance business activity in the area and to increase its attractiveness via collaborative working. There are a number of strands to its strategy, including: marketing the area to drive footfall levels; funding additional police presence to improve safety; and improving the cleanliness of the environment. Ultimately, it is about building a team spirit among businesses so that collective action for improving the City Centre can be engendered for the mutual benefit of traders and the city centre.

2.25 Investment Fund

The Northern Ireland Executive created an £100m Investment Fund as part of 2016-17 Budget to increase investment in private sector-led development, infrastructure and low carbon economic projects. As an offshoot of this, Belfast City Council launched an initiative to support Grade A office development within the scope of this investment package. While retailing is not expressly identified for investment under this Fund mixed use development is.

2.26 Conclusion

Having regard to the foregoing it is evident that this Retail and Leisure Study has to be mindful of the comprehensive planning and development background to its preparation. In particular, the Study has to be cognisant of strategic objectives at the regional level and its cross-cutting relationship with the desired outcomes of other work.

SECTION 3: EXISTING RETAIL ENVIRONMENT

3.0 Introduction

This section of the Retail and Leisure Capacity Study examines the existing retail environment in Belfast. It includes a health check of the City Centre and District Centres.

3.1 Retail categories

When seeking to review the existing retail environment it is first necessary to appreciate how shops are categorised. For the purposes of planning, shops are classified as outlets selling: (i) convenience goods; (ii) comparison goods (bulky and non-bulky); and (iii) retail services. Each of these categories is detailed below.

(i) Convenience goods are mainly groceries and other consumable commodities that are generally purchased regularly and usually locally. They include food, drinks (including take home alcoholic drinks), tobacco, newspapers, magazines, cleaning materials and toiletries.

The regularity of convenience shopping trips and the nature of the merchandise sold (especially chilled/frozen foods) dictate that shoppers for convenience goods normally undertake short trips to purchase such items.
Shopping for convenience goods is often simply referred to as food shopping.

(ii) Comparison goods are durable items for which customers are prepared to travel some distance in order to compare prices and quality. They include clothes, footwear, household durables, fashion accessories and leisure goods.

They are generally purchased in large retail centres and shopping trips for these goods generally take longer.

Bulky goods shopping is a subset of comparison goods retailing. It refers to large items such as furniture, carpets, electrical/white goods and DIY goods. Due to their bulky nature retailers of these products typically require large unit footprints for the sale and display of these goods, as well as adjacent parking provision.

Comparison goods shopping, including bulky goods shopping, is often simply referred to as non-food shopping.

(iii) Retail services refer to businesses whose primary trade is the retailing of a service and/or hiring of goods. This category includes hairdressing and personal grooming outlets, dry cleaners, travel agents, repair shops, post offices, opticians, fancy dress shops and tv/video outlets.

All of the above categories can be collectively referred to as A1 uses under the Use Classes (NI) Order 2015.

3.2 Existing retail hierarchy

Largely in keeping with BMAP the Preferred Options Paper (POP) identifies the following hierarchy of retail locations in Belfast:

Level 1 - Retail core and Belfast City Centre
Level 2 - District Centres
These are all purpose-built shopping locations in Belfast and, for the most part, are situated on arterial routes. They include the Connswater Shopping Centre, Park Centre, Kennedy Centre, Westwood Centre, Cityside (Yorkgate), Hillview Retail Park and the Dairy Farm shopping complex.
Level 3 - Local centres at Kingsway (Dunmurry) and King's Square (Dundonald)
Level 4 - Neighbourhood centres along arterial routes

3.3 Belfast City Centre Health Check

According to paragraph 6.285 of the Strategic Planning Policy Statement (SPPS) town centre health checks form part of the evidence base for Local Development Plans (LDPs). Accordingly, they should contain information on a range of indicators, including:

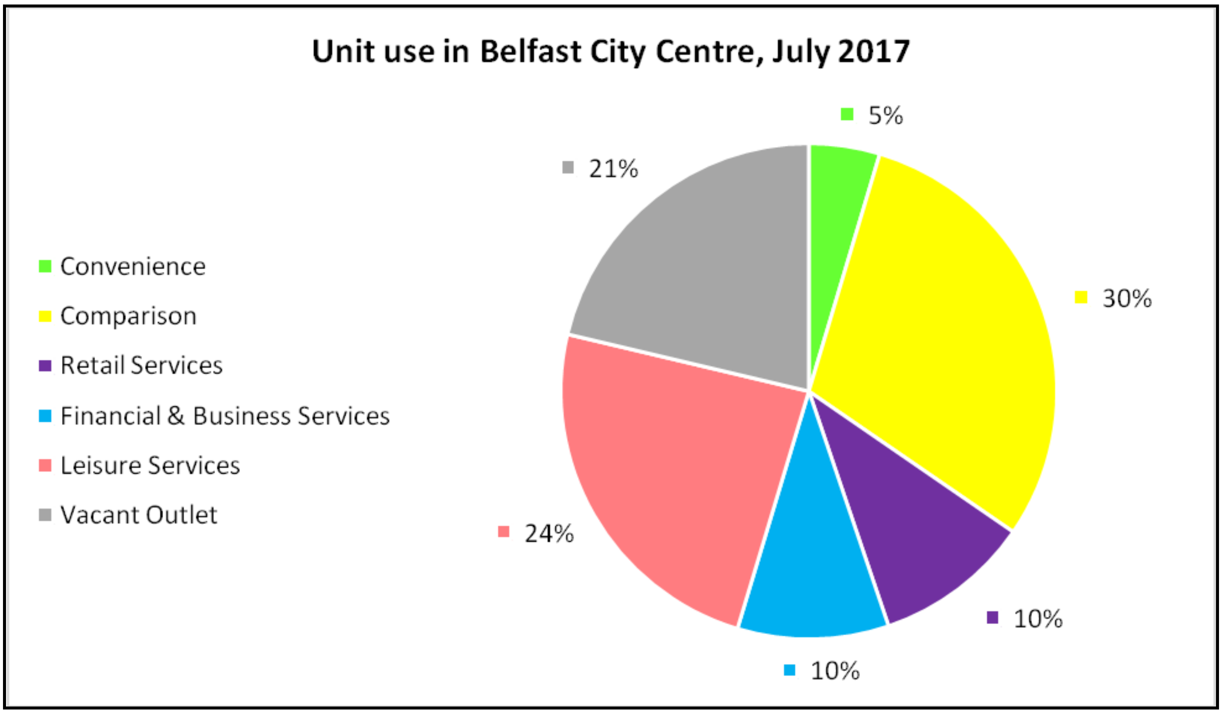
- existing town centre uses, including resident population;
- vacancy rates;
- physical structure and environmental quality;
- footfall;
- retailer representation;
- attitudes and perceptions;
- prime rental values; and
- commercial yields.

Each of these indicators is addressed below in respect of Belfast City Centre.

3.31 Existing City Centre uses
A survey of the City Centre in July 2017 indicated the following:

- Retailing, in the form of comparison goods shopping, convenience goods shopping and retail services, jointly accounted for 45% of the 1,451 units surveyed. The majority of retail service units consist of health and beauty outlets, opticians and travel agents.
- Leisure services, including restaurants, cafes, bars, etc accounted for 24% of units in the City Centre, with Financial and Business Services comprising 10%.
- Vacancy within the City Centre was relatively high at 21%.

Figure 3.1



The above findings underline the mixed use character of Belfast City Centre.

It is estimated that the resident population of Belfast City Centre is currently in the region of 9,000 people. It will continue to increase as a consequence of apartment construction and the development of purpose-built city centre accommodation for 3,000 students attending the new University of Ulster campus at York Street.

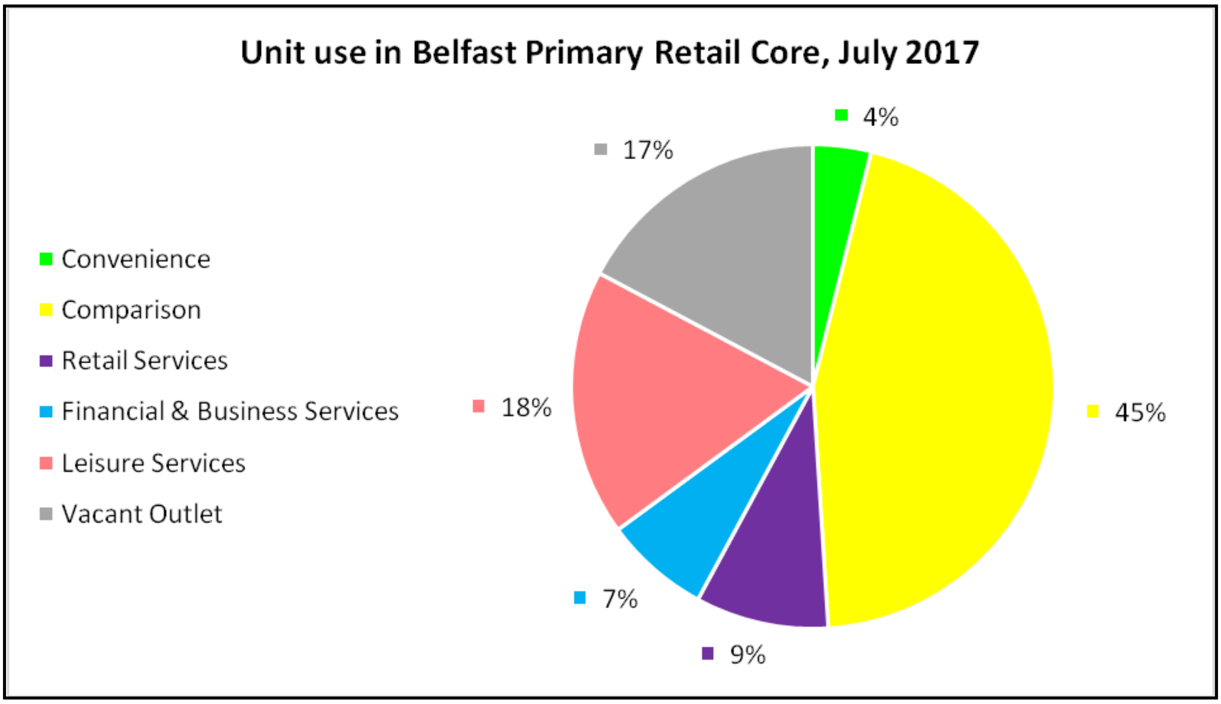
Figure 3.2: Newly built student accommodation on Dublin Road

Retail Core

The Retail Core comprises just under half the businesses identified in the City Centre. Reference to Figure 3.3 indicates that:

- Convenience and comparison retailing, together with retail service uses, account for 58% of the businesses – 13% higher than in the City Centre as a whole.
- Vacancy is slightly lower at 17% of units.

Figure 3.3



GOAD provides the following breakdown of floorspace within the primary retail area, which includes the Retail Core. The level of retail floorspace assigned to retail use totals 116,551 net sqm, which approximates to 57% of the total floorspace.

Table 3.1

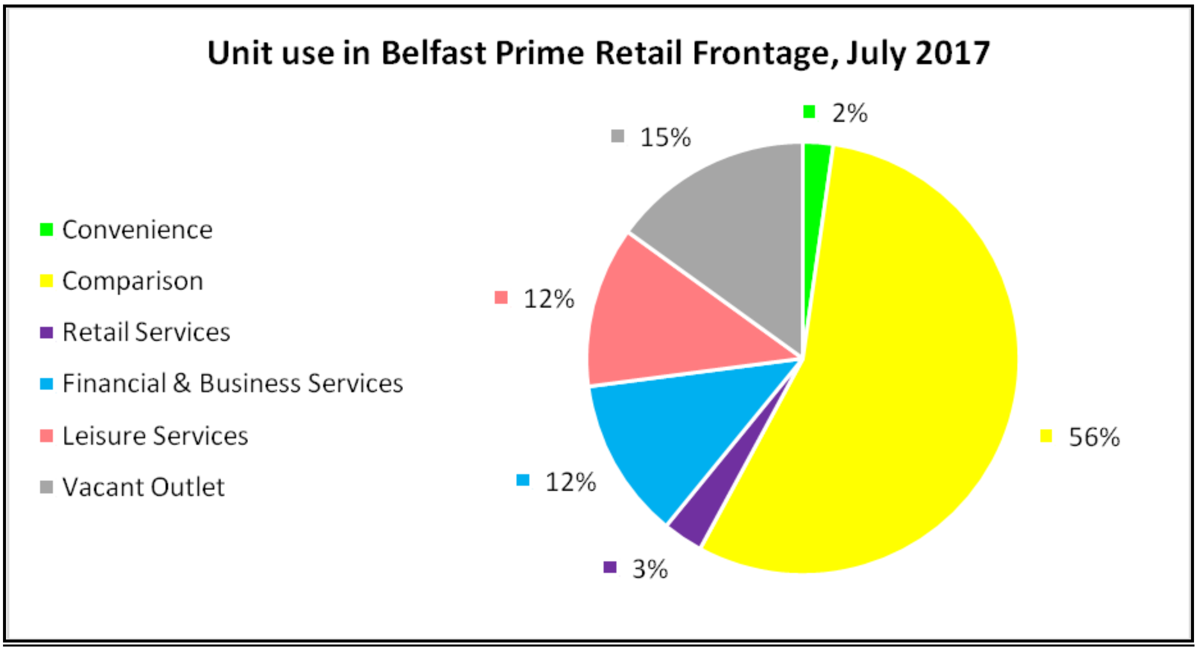
Floorspace in Belfast's Primary Retail Area*	
Use	**Net sqm#**
Comparison	100,409
Convenience	9,112
Retail service	7,031
Retail subtotal	**116,551**
Leisure service	43,835
Financial & business services	13,698
Vacant	29,602
Total	**203,686**

** GOAD's coverage applies to primary retail area in city centres which in the case of Belfast includes the Retail Core and adjacent areas. The data relates to GF uses except in shopping centres*
 # based on 80% net sales space applied to GOAD data

Primary Retail Frontage
When analysis of the mix of uses is confined to the Primary Retail frontage Figure 3.4 reveals the following:

- Convenience and comparison retailing, together with retail service use, comprises 61% of the units on the Primary Retail Frontage – 3% higher than in the Retail Core.
- The proportion of vacant units is again lower at 15%.

Figure 3.4



Trends in City Centre mix

In order to examine the profile of land uses in the central area of Belfast over a period of time it is necessary to consult GOAD data. It is available for the years 2009 and 2016. As noted above, this GOAD information is available for the primary retail area in the City Centre, which includes the Retail Core.

With the aid of Table 3.2 the following observations can be deduced for this period.

- The proportion of comparison goods shops has fallen by 7% between 2009 and 2016.
- In contrast to the above, the proportion of leisure service uses has increased by 5%.
- The proportion of vacant units has remained the same at 18%.

Table 3.2

Mix of uses in Belfast's Primary Retail Area* 2009-2016			
	Unit percentage		
Use	**2009**	**2016**	**Change**
Comparison	43%	36%	-7%
Convenience	6%	7%	1%
Retail service	7%	9%	1%
Retail subtotal	**56%**	**52%**	**-4%**
Leisure service	19%	24%	5%
Financial & business services	7%	6%	-1%
Vacant	18%	18%	1%
Total	**100%**	**100%**	
** GOAD's coverage applies to primary retail area in city centres, which in the case of Belfast includes the Retail Core and adjacent areas.*			

Mix of uses in Belfast Retail Core relative to GB average

Examination of GOAD data also allows Belfast to be compared to the city centre profile in GB. Table 3.3 shows that, compared to the GB average, Belfast's Retail Core has a higher proportion of its units assigned to the sale of comparison goods (36% v 32%). In addition, as with GB as a whole, convenience goods shopping in the Retail Core accounts for a relatively small number of units (7% v 9%).

Table 3.3

Mix of uses in Belfast's Primary Retail Area* relative to UK average 2016		
	Unit percentage	
Use	**Belfast City Centre**	**UK**
Comparison	36%	32%
Convenience	7%	9%
Retail service	9%	14%
Retail subtotal	**52%**	**54%**
Leisure service	24%	24%
Financial & business services	6%	11%
Vacant	18%	11%
Total	**100%**	**100%**
** GOAD's coverage applies to primary retail area, which in the case of Belfast includes the Retail Core and adjacent areas.*		

3.32 Vacancy rates

The most significant indicator of the health of existing centres is the level of vacancy, even allowing for the fact that a local store may perform well yet fall victim to company restructuring and rationalisation.

Vacancy is expressed by unit numbers and by floorspace, with the latter usually producing a lower recording than the former. GOAD data for 2016 indicates that, in terms of unit numbers, vacancy in the primary retail area of Belfast is still in excess of the GB average (18% v 11%). In floorspace terms, the respective vacancy percentages for Belfast and GB are 14% and 9%.

In common with the experience in GB the trend in recent years has seen the amount of vacancies fall on the prime pitches.

When the up-to-date vacancy survey carried out by Belfast City Council in July 2017 is compared to an earlier vacancy survey in 2010 it reveals that, even though the overall vacancy rate remains unchanged, occupancy has improved appreciably in the area of Ann Street. In contrast, clusters of vacancy are beginning to form in the area around Fountain Street and Queen Street. In terms of environmental impact, the departure of the BHS Department Store has left a prominent vacancy imprint on the area between Castle Lane and Castle Place (Figures 3.5 and 3.6).

Figure 3.5: Vacant BHS store frontage on Castle Place **Figure 3.6:** Vacant BHS store frontage on Castle Lane

3.33 Physical structure and environmental quality

The environmental quality of Belfast City Centre has improved markedly in recent years with the roll out of the Streets Ahead project and its focus on environmentally improving the streetscape in the centre of Belfast. Phase 1 involved the environmental upgrade and transformation of 14 streets in the commercial and retail centre of Belfast. Phase 2 has yet to be implemented and involves the pedestrianisation of Donegall Square and Donegall Place. Its implementation has been superseded by Phase 3 of the Streets Ahead project. This will provide new surfacing, lighting, landscaping, street furniture and public art across approximately 20,000 sqm of footways and 27,000 sqm of carriageway. It will span the length of Royal Avenue to connect the area around St Annes and the new University of Ulster campus with Donegall Place.

Figure 3.7: Streets Ahead treatment on Donegall Place & Arthur Street

Notwithstanding the above, the physical structure of central Belfast has its challenges in the form of dereliction and urban decay in its northeast and northwest quarters, both of which are the subject of regeneration plans. It is envisaged that the multiplier effects associated with the huge Ulster University campus development off York Street will help bolster the regeneration prospects for these areas, particularly the northeast.

3.34 Footfall

Springboard carried out footfall counts for the Bid One area of Belfast in June 2017. It covers many of the prime pitches in the Retail Core. The counts indicated that the number of visitors in the month of June 2017 totalled 2.8 million but was down by nearly 5% on the previous year. While Cornmarket and Donegall Place recorded the highest pedestrian counts (in excess of 160,000 visitors per month) footfall in Donegall Place had fallen by 13% on the same period in 2016. It is interesting to note that pedestrian counts carried out for the BMAP Retail Study in March 2002 also recorded the highest figures for the aforementioned streets, as well as Ann Street. So too, Saturday continues to be the busiest day in terms of pedestrian flows.

Overall, despite a fall on last year's numbers, footfall levels are considerably higher than two years ago and can largely be attributed to a number of factors. These include a favourable currency differential with the Euro which has boosted shopper numbers from the Republic of Ireland, together with the increasing tourism appeal of Belfast as a City Break and Cruise Ship destination. In 2015 there were over 1.4 million overnight trips to Belfast and over 80 cruise ships berthed in Belfast in 2016 carrying 145,000 passengers.

Footfall in Belfast City Centre will also be boosted by new hotel and Grade A office development taking shape. Hotel development in Belfast has gathered apace in recent years due to the increasing tourism appeal of the City and Northern Ireland as whole. As noted earlier in this Study there are 15 proposals for hotel development totalling 1,833 bedrooms. Work has commenced on at least 7 of these. As for office development circa 50,000 sqm is earmarked for construction by 2018. Furthermore, as recorded previously, footfall in the City Centre will be significantly uplifted by student numbers attending the new university campus at York Street, a fair proportion of which will reside in newly built student accommodation in the City Centre.

3.35 Retailer representation

Belfast City Centre has been the recipient of much of the leasing activity in Northern Ireland in recent years. As explained below, this has been generated by both new entrants and existing businesses.

- While Gap relocated from Castlecourt to the former Eason's unit on Donegall Place, the Entertainer and Yours Clothing chose Castlecourt to open their first stores in Northern Ireland.
- DW Sports acquired the former Internacionale property on Donegall Place.
- As an indication of the increasing presence of Leisure Service uses Greggs opened its first outlet in Northern Ireland on Royal Avenue and Patisserie Valerie opened a restaurant on Castle Lane to add to its Donegal Square West presence.
- Stradivarius opened its first Northern Ireland store in Donegall Place (Figure 3.8).
- So too, a Danish homeware chain "Sostrene Grene" opened its first NI store in Ann street in 2016 (Figure 3.9).

Figure: 3.8: Stradivarius on Donegall Place

Figure 3.9: Danish Homeware store on Ann St

All of the above activity is underpinned by a fall in rental costs, the availability of attractive incentives and increased flexibility in the terms of lease possible.

Evidently, Belfast is proving an enticing proposition for investment by major national and international brands. This is corroborated by the finding in Table 3.4 which indicates that the presence of multiples among shops selling comparison goods has increased from 51% in 2009 to 55% in 2016.

Table 3.4

Presence of Multiples in Primary Retail Area 2009-2016		
	2009	**2016**
Proportion of units selling comparison goods	51%	55%
Source: GOAD		

3.36 Attitudes and perceptions

A survey of visitors to Belfast City Centre was undertaken by Belfast City Centre Management in December 2015. Some 257 people were interviewed at a number of locations in the City Centre, the key findings of which include the following:

- 69% agreed or strongly agreed that there was a good range of shops available in the City Centre.
- Only half of those surveyed stated that the City Centre was their first choice location for shopping.
- Two thirds of people spent in the region of £20 to £100 on a shopping trip to the City Centre.
- While the majority of people (two thirds) cited that they felt safe in the City Centre approximately 18% expressly stated that they did not.
- The main reason for visiting the City Centre at night was to socialise (75% of people said this). Only 4.7% of people visit for recreational purposes.
- Approximately half of those interviewed stated that they spent between £50 and £150 when visiting the City Centre in the evening. In terms of revenue generation per trip, therefore, the evening economy is clearly important for the health of the City Centre.

As for retailers, Retail NI undertook a survey of its shop members across Northern Ireland in 2016 as part of the preparation of its Programme for Government 2017–2022. Payment of rates, labour costs relating to compliance with the national living wage legislation, and business regulations (red tape) featured prominently as ongoing concerns. Even with the existence of the Small Business Rates Relief scheme over 70% of businesses stated that their rates increased as a result of the recent revaluation.

In order to assist small businesses, Retail NI suggests the application of a flat rate payment scheme for rates, as well as the extension of the empty premises rates relief scheme. Specifically for Belfast it suggests the introduction of an Enterprise Zone (EZ) for the City Centre similar to that model adopted in Cardiff City Centre. An EZ offers a range of incentives including: 100% rates relief over the first few years, enhanced capital allowances against tax and simplified planning powers. In its first three years it helped trigger development of over half million square feet of office space in run down parts of Cardiff City Centre.

3.37 Rental values

Rental values provide an indication of the appeal of a retail location but they vary considerably according to a range of factors, including:

- the size and specific location of the unit e.g. a unit located on a prime pitch or near an anchor unit will pay appreciably more rent;
- the type of shopping taking place within the unit e.g. foodstore versus retail warehousing; and
- the anticipated turnover of the unit. This applies mostly to units within shopping centres but in today's market it is a significant consideration for occupancy of any unit.

Not surprisingly Belfast commands the highest rents for retail space in Northern Ireland. However, within the space of four years from 2008 the highest Zone A rents in Donegall Place have more than halved from £300 psf. Indeed, in the 2013 publication "Beyond Retail" it was estimated that as many as 30% of shops in the UK at the time were on a short term lease, with many paying little or no rent on the understanding that rates and service charges (if applicable) were paid.

Rent free incentives for between 6-18 months and empty premises rate relief for the initial year are still available, as well as fitting out contributions. Landlords generally seek 10 year leases with a 5 year review. However, some retailers are now requesting 5 year leaseholds with a 3 year review. Added to this, some retailers seek to mitigate overheads by obtaining concession space within established units, thereby sharing the costs of rent and rates. This trend is becoming particularly noticeable in retail parks.

At present, the rental picture in GB is generally one of stability wherein towns have managed to stem the rental decline encountered since 2008. Indeed, some cities have even experienced rental growth. This is case with Belfast, where the uplift in demand in prime pitches referred to earlier has led to a reduction in vacancy levels. As with other cities in GB, this has resulted in slight rental growth after years of reversal according to Lisney, with Zone A rents in prime pitches trending in the region of £125-130 per sqft per annum (Source: Lisney, Quarter Four 2016 & 2017 Outlook).

3.37 Commercial Yields
Commercial yield is the percentage return secured from investing in property. It is based on the property's cost or market value, annual income and running costs. Latest research by Savills in February 2017 indicates that a slightly higher rate of return can be obtained from investment in prime assets in Belfast than in similar cities in GB such as Liverpool, Manchester and Leeds (Table 3.5). For example, investment in the high street of Belfast is anticipated to provide an annual yield of 5.5% compared to 4.5% for a similar high street location in Manchester.

Table 3.5

Equivalent Yields for Prime Assets				
	Belfast	Liverpool	Manchester	Leeds
High Street Retail	5.5%	4.8%	4.5%	4.8%
Retail warehousing (Open A1)	6.3%	5.5%	5.3%	5.3%
Retail warehousing (Bulky goods)	6.8%	6.3%	6.0%	6.0%
Shopping Centre	6.5%	4.5%	4.5%	4.5%
Source: Savills, February 2017				

3.4 Health check of District centres

District Centres are intended to provide for a critical mass of retail, service and leisure provision outside the City Centre. They are meant to be convenient and easily accessible to the local community by all modes of travel. In the main, they perform the following functions. Firstly, in terms of retailing, they provide a sizeable convenience goods offer in the form of a supermarket or superstore for local shopping needs. Secondly, they afford an opportunity to provide for a fair element of comparison goods shopping beyond the City Centre. The two uses are mutually interdependent in that the comparison goods shops rely upon the regular weekly custom of grocery shopping. Thirdly, they allow for related retail service and leisure service uses to develop at the location, such as personal care and restaurant uses.

However, the preference of convenience goods retailers to trade from freestanding stores which are independent of the leasing, servicing and operational requirements of shopping centres, has resulted in the departure of major food retailers from District Centre malls. The loss of these stores threatens the viability of the District Centre shopping mall format.

Against this background a review of the District Centres in Belfast is provided below.

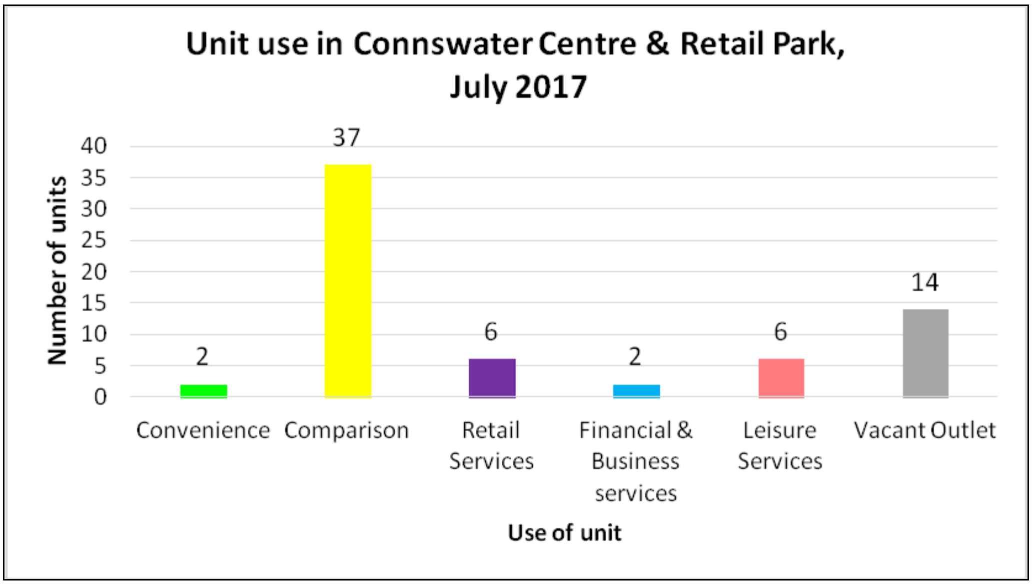
Connswater

Connswater District Centre consists of the Shopping Centre and an adjoining retail park. Only the shopping centre is designated as a District Centre for open A1 consent under BMAP. Built in 1983 the shopping centre comprises a total of 47 units totalling circa 20,800 gross sqm. Tenants include Argos, Bon Marche and Boots. The 20 units within the adjoining retail park total circa 12,300 gross sqm, giving a combined total of approximately 33,000 gross sqm of retail and leisure floorspace on the site. Tenants include B&M Bargains, Carpet Right, Halfords, Poundland and Maplin. The site also accommodates Northern Ireland's first drive thru Starbucks coffee outlet plus a gym. There are a total of 1,642 free car parking spaces available at this location.

Figure 3.10: Connswater Shopping & Retail Park in East Belfast

Connswater shopping mall is now devoid of its major food retailer, namely Tesco. Tesco relocated to a new standalone superstore at the nearby Castlereagh Road. Its popularity is highlighted in the household shopper survey findings for this study, which perhaps gives an idea of the impact it has had on the Connswater Centre. Reference to Figure 3.11 below shows that 14 units (21%) are vacant in the shopping centre and retail park. Having stated this, the Centre has recently managed to attract the Range retailer to anchor the 6,000 gross sqm unit vacated by Tesco. In so doing, it would seem that the convenience anchor role is now assumed by Lidl, which trades outside the shopping centre in the adjoining retail park.

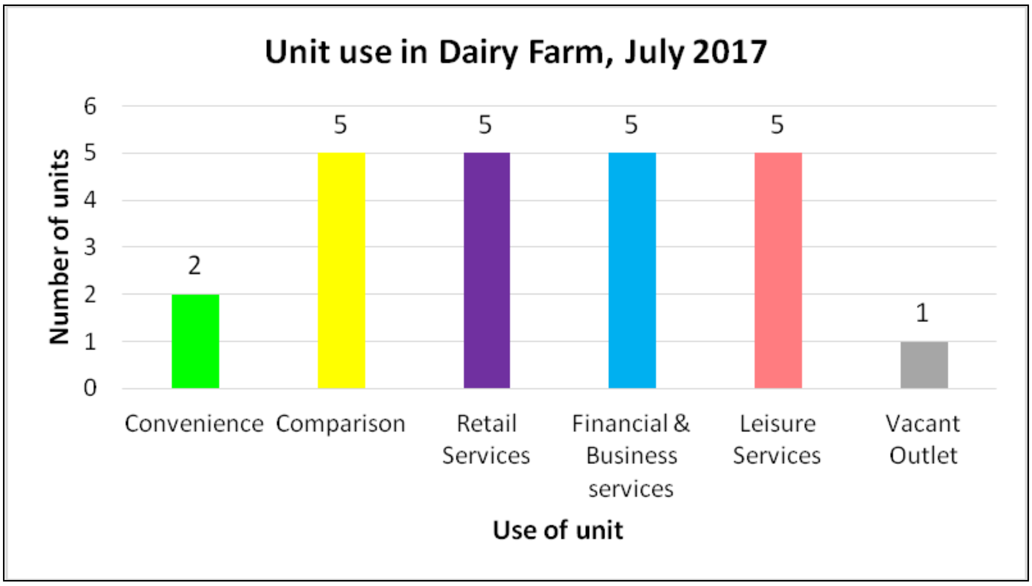
Figure 3.11



Dairy Farm

Although anchored by a Supervalu store most of the 23 units are assigned to a mix of non-retail use, including a credit union, bingo club, fitness outlet and solicitors office. Only 1 unit was vacant within the centre on the day of inspection though enquiries reveal that leasing opportunities exist in another unit within the centre and in two units at the rear of the centre. There is in the region of 100 free parking spaces available on site and relatively low footfall levels are recorded for this location (circa 8,400 visitors per week). The overall amount of floorspace within this extensive District Centre boundary is circa 14,000 gsm, 9,200 gsm of which is shopping centre space.

Figure 3.12



The Department for Social Development (DSD) has planning permission to redevelop this centre as part of a larger new "town centre" for the Colin Area, which includes Poleglass, Twinbrook, Lagmore and Upper Dunmurry Lane. A survey of residents in the Colin Area by the DSD in 2013 revealed that only 4.5% of people visited the Supervalu anchor store at the Dairy Farm for their main food shopping needs.

Figure 3.13: Dairy Farm District Centre

Park Centre

Established in 1985 the Park Centre consists of 40 units totalling circa 15,000 gross sqm and is served by 800 free car parking spaces. As in the case of the Connswater Shopping Centre, the Park Centre no longer has its main anchor food and drapery store (Dunnes). Iceland, New Look and the resilient discounters Poundland and B&M Bargains still trade here and an appreciable proportion of the centre is devoted purely to retailing. Worryingly, however, a quarter of the units (10) are vacant. The site is marketed as attracting a weekly footfall of 45,000 people.

Figure 3.14

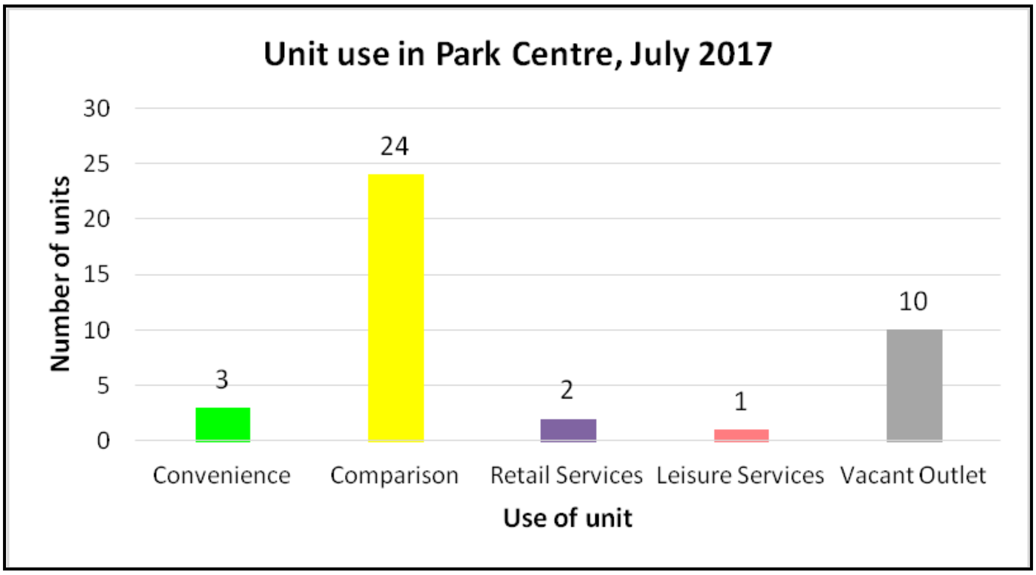


Figure 3.15: Park Centre District Centre with vacant "Dunnes" anchor store to the left of entrance

Westwood District Centre

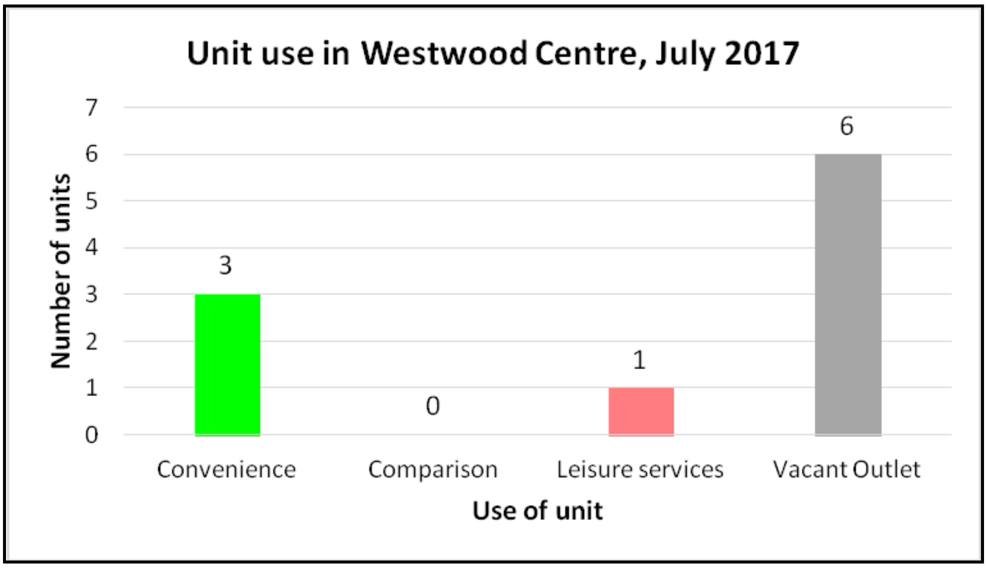
ASDA is the main food anchor store of this District Centre. It adjoins a parade of large retail warehouse-type units that were developed in place of the former shopping mall. They are recently built, which explains why most are vacant and available to let. B&M Bargains occupies a unit and enquiries reveal that Harry Corry is committed to taking another (Figure 3.16). A planning application is pending to change the use of one of the units for banking.

Figure 3.16: Westwood District Centre

Added to these units, there is also a freestanding Lidl store and a McDonald's restaurant on the site, together with 439 free car parking spaces. The total gross retail floorspace on the site currently totals 11,550 sqm divided among 9 units, with mezzanine consent for another 2,700 gross sqm.

There is also planning permission for substantial Phase 2 development on adjoining land. It provides for a larger foodstore for ASDA (5,153 gross sqm) as well as another 18 comparison goods units totalling 17,814 gross sqm. Notably, the level of comparison goods floorspace permitted for Phase 2 is twice the level of floorspace built and granted for Phase 1.

Figure 3.17



As an indication of the appeal of the ASDA store at Westwood the aforementioned DSD survey of residents in the Colin area in 2013 (Poleglass, Twinbrook, Lagmore and Upper Dunmurry Lane) revealed that half of them visited the store for their main food shopping.

Kennedy Centre

The Kennedy Centre first opened in 1981 and was redeveloped in 2009 to include Northern Ireland's largest Sainsbury Store (9,000 gross sqm) and filling station. Totalling 31,000 gross sqm and containing nearly 50 units there are 800 free car parking spaces available. Based on occupancy rates the Kennedy Centre is performing very well compared to other District Centres – only 1 unit is vacant. It has an eight screen omniplex cinema as part of its profile, with an accompanying foodcourt on the first floor. The site is marketed as attracting a footfall of 70-80,000 shoppers per week and has a dedicated taxi rank.

Figure 3.18

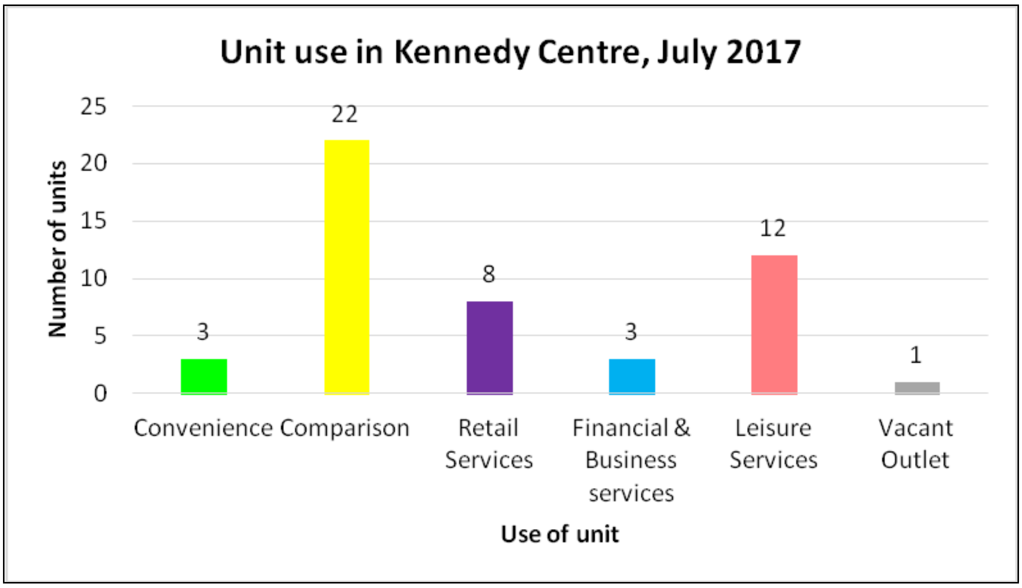


Figure 3.19: Kennedy Centre District Centre

Cityside

As with the Kennedy Centre occupancy rates at Cityside (formerly known as Yorkgate) would suggest that this District Centre is performing reasonably well – no doubt helped by the draw of Tesco and ASDA Living. It comprises over 35 units totalling 26,925 gross sqm, including a 14 screen Movie House cinema. There is in the region of 900 free parking spaces available at this location.

In 2016 the Definitive Guide to Retail & Leisure Parks 2016 by Trevor Wood Associates rated the centre at number 5 out of 32 retail and leisure parks in the UK.

On the day of inspection for this Study six of the units were vacant (17%) which is the average for Belfast as a whole.

It has recently invested in refurbishing the location's leisure offering in the expectation of benefiting from the arrival of thousands of students in the north of Belfast city centre, when Ulster University opens its new campus on York Street.

Figure 3.19

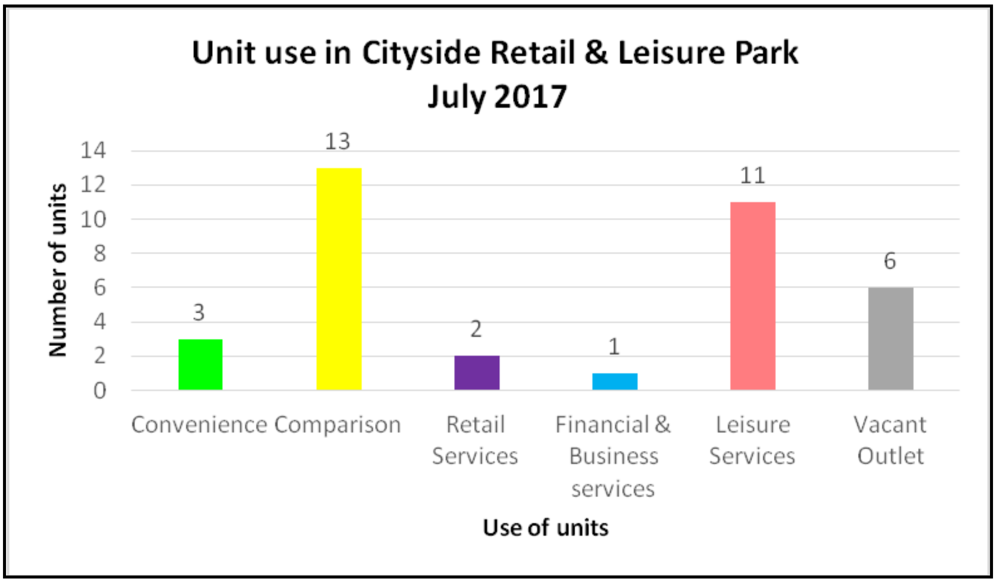


Figure 3.20: Cityside District Centre

Hillview District Centre

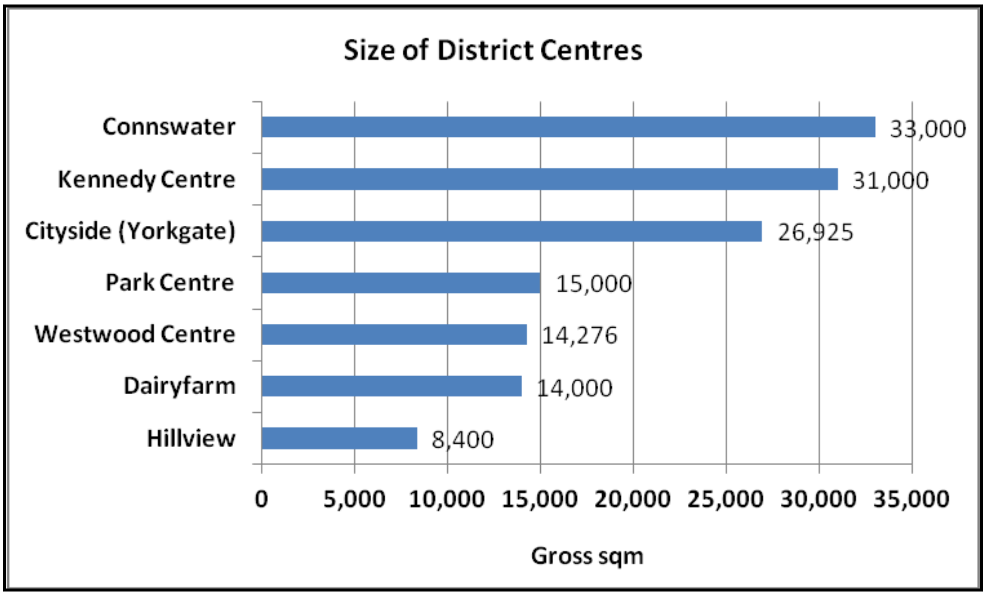
At present Hillview Retail Park is a District Centre in name only. It opened in 2001 and consists of a total of 8,400 gross sqm, comprising an anchor foodstore (4,500 gross sqm) and 5 additional units. There is parking for 500 vehicles.

This purpose built centre is completely vacant and has been since Dunnes vacated the main unit in 2007. Since then a weekly Sunday market and car boot sale has taken place on the 10.5 acre site.
The new owners of the site, Hillview Centre Belfast Ltd, have lodged proposals to reconfigure the units to provide a car sale showroom and freestanding units consisting of a drive-thru restaurant, drive-thru cafe and cafe/restaurant unit.

Figure 3.21: The vacant Hillview District Centre

The overall size of each of the 7 District Centres in Belfast is illustrated below in Figure 3.22.

Figure 3.22

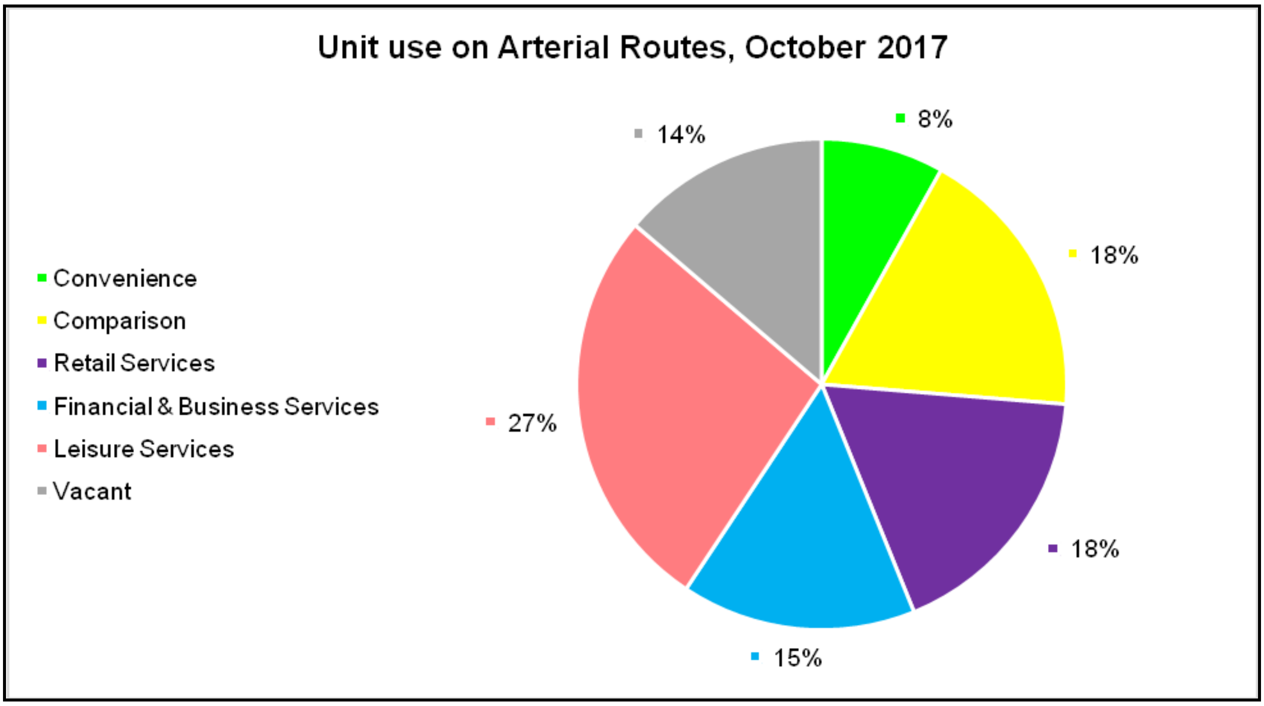


3.5 Local centres

Outside of the City Centre and District Centres most retail and leisure provision can be found in local centres located along the main roads that connect the neighbourhoods of Belfast with the City Centre. Many of the local centres are located on the 18 arterial routes identified in draft BMAP and are zoned as shopping/commercial areas and nodes. Draft BMAP only designates 2 local centres at Kingsway (Dunmurry) and Kings Square (Dundonald). Kingsway is essentially Dunmurry Village (excluding the Tesco-anchored shopping centre) and is located on the Lisburn Road arterial route. Kings Square is a purpose built centre on the Kings Road, which is not an arterial route, and is anchored by a Supervalu store. At the time of survey 13% of units at Kingsway were vacant, which is in keeping with the average for all arterial routes, and no units were vacant at Kings Square.

Arterial routes are well serviced by public transport and accommodate a sizeable proportion of mixed use development along their linear paths. There are over 2,700 businesses along these routes and a percentage breakdown of their unit use is provided in Figure 3.23. It can be seen that the largest proportion of uses are leisure services (27%), with unit vacancy rate a third lower than that for the City Centre (14% v 21%). Pure retailing in the form of convenience and comparison goods shopping jointly accounts for just over a quarter (26%) of the business units on these roads.

Figure 3.23



Upon closer examination of arterial routes the following observations can be made:

- Those routes which have the highest unit vacancy rate as a proportion of total businesses located there include: Albertbridge Road (30%); Shankill Road (29%) and Donegall Road (29%). The Oldpark and Falls Road have the lowest vacancy rates (5% and 7% respectively).

- The routes with the highest proportion of comparison goods shops among their business profiles include: Andersonstown Road (23% of units); Lisburn Road (22%) and the Castlereagh and Albertbridge Road (21% each). The University/Malone Road and Ormeau Road have the lowest percentage of shops selling these items (4% and 9%).

- The routes that are in possession of the greatest percentage of fast food outlets are the Crumlin Road and Falls Road - 14% and 13% respectively against an average of 8% across Belfast.

3.6 Out of centre retailing

The largest concentration of retailing in Belfast outside of the City Centre is at Boucher Road and at Holywood Exchange. The combined retail footprint at these locations is circa 130,000 gross sqm, which is on a par with the 2016 retail footprint estimated by GOAD for the primary retail area of Belfast (145,000 gross sqm).

Boucher
Retailing has gravitated towards the Boucher industrial/business area because it contains large sites that afford spacious operating and servicing areas. Three purpose-built retail parks form the backbone of shopping provision in the Boucher area, including Boucher Retail Park, Shane Retail Park and Balmoral Plaza. Added to these, there is a range of freestanding and grouped retail warehouse provision throughout the area, including locations on Boucher Road, Boucher Crescent, Boucher Way, Boucher Place and Glenmachan Place.

With the exception of the vacated B&Q store vacancy levels in Boucher are low and well below the average for Belfast.

As evidenced by the existence of Next, Burtons, River Island, etc, Boucher Retail Park has largely transformed into a centre selling general comparison goods as opposed to mainly bulky goods.

Figure 3.24: Boucher Crescent Retail Park

Holywood Exchange
There is approximately 60,000 gross sqm of retail space on the outskirts of Belfast close to Belfast City Airport. This includes a Sainsburys superstore (6,000 gross sqm), IKEA store (29,000 gross sqm), B&Q supercentre (12,000 gross sqm) and retail warehouse park (14,000 gross sqm). The Retail Park includes operators such as Harvey Norman, Next at Home and sports goods retailer Decathlon.

3.7 Conclusion

This section of the Study has provided an overview of the existing retail sector in Belfast, both quantitatively and qualitatively. It is clear that some locations are faring better than others. It is also apparent that, based on the distribution, scale and nature of the retail offer available across Belfast, the City Centre is confronted with its own competitive challenges from within the Council area.

SECTION 4: EXISTING LEISURE SERVICE SECTOR

4.0 Introduction

This section provides an overview of the main leisure service uses in Belfast. Because it relies heavily on GOAD data for the identification of trends from 2009 the information pertains mainly to the central part of Belfast City Centre surveyed by that organisation.

4.1 Categories of leisure service use

When considering leisure service uses it is necessary at the outset to distinguish between leisure services and leisure goods. This is because the term "leisure goods" includes items, for e.g. sports equipment, which are categorised as comparison goods. Viewed in this context, the term "Leisure services" is very much service and activity based and largely refers to the following uses:

- Restaurant/cafe/fast food takeaway – eating out
- Public houses/bars/clubs – socialising with a drink
- Cinema, theatres and concert halls – entertainment
- Betting offices, gaming centres, bingo – partaking in a game of chance
- Gyms, leisure centres, swimming venues – recreation

4.2 Existing leisure service uses in Belfast City Centre

Table 4.1 gives a breakdown of leisure service uses in the City Centre by unit number and floorspace in Oct 2016.

Table 4.1

Breakdown of leisure service uses in Belfast City Centre #
by unit and floorspace, October 2016

Leisure service use	Units	% units	Net sqm	% Net sqm	Average unit size*
Restaurant	56	23.0%	12,219	27.9%	218
Café	63	25.9%	6,852	15.6%	109
Fast food	35	14.4%	3,441	7.9%	98
Subtotal	**154**	**63.4%**	**22,512**	**51.4%**	
Public house	23	9.5%	4,236	9.7%	184
Bars	27	11.1%	5,938	13.5%	220
Clubs	10	4.1%	2,839	6.5%	284
Nightclubs	2	0.8%	320	0.7%	160
Subtotal	**62**	**25.5%**	**13,333**	**30.4%**	
Cinema/Theatres/Concert halls	**3**	**1.2%**	**3,634**	**8.3%**	1,211
Betting office	16	6.6%	2,267	5.2%	142
Amusements & bingo	7	2.9%	1,665	3.8%	238
Subtotal	**23**	**9.5%**	**3,932**	**9.0%**	
Sports & leisure facilities	**1**	**0.4%**	**424**	**1.0%**	424
Total	**243**	**100%**	**43,835**	**100%**	

 # based on GOAD's demarcation of the Primary Retail Area.

** Based on 80% of GOAD's floorspace estimate*

It can be seen that restaurant/café and fast food use is the biggest contributor to leisure service uses, accounting for 63% of the units and 51% of the floorspace.

Drinking establishments make up the next largest use, comprising 25.5% of leisure service units and 30.4% of the floorspace.

Further details on each category of leisure service use are provided below.

Restaurant/cafe/fast food takeaway

There are over a 1,000 eateries in Belfast that can be described as a restaurant, cafe or fast food takeaway. Subdivision of eateries into specific categories is difficult due to the overlapping nature of service offered by the outlets. Nonetheless, in very approximate terms, a third of this number can be described as restaurants, a third cafes and a third hot food takeaways.

Table 4.2 shows that fifteen new restaurants opened in the central part of Belfast in the space of 3 years between 2013 and 2016. As an endorsement of the appeal of Belfast for eating out the 2016 National Geographic acknowledged it as one of the top places to travel to for food in the world.

Table 4.2 also indicates that the number of fast food takeaways in Belfast City Centre has decreased slightly from 39 in 2009 to 35 in 2016.

Table 4.2

Number of eateries in Belfast City Centre* 2009-2016			
Use	**2009**	**2013**	**2016**
Number of cafes	58	55	63
Number of restaurants	18	41	56
Number of fast food & takeaway	39	36	35
Total	**115**	**132**	**154**
** GOAD's coverage applies to groundfloor uses in primary retail area, which in the case of Belfast includes the Retail Core and adjacent areas.*			
Note: GOAD's survey area expanded in 2010 to include part of Cathedral Quarter			

Figure 4.1: Starbucks and Greggs on the Primary Retail Frontage at Castle Lane

Public houses/bars/clubs

There are over 200 establishments in Belfast that can be described as a pub, bar or social club.
In 2016, according to GOAD, there were 62 licensed establishments categorised as "pubs, bars and clubs/nightclubs" operating in the central part of Belfast. This represents an increase of 20 since 2009, though part of this increase can be attributed to the extension of the survey area by GOAD in 2010 to include the northern half of the Cathedral Quarter, from Talbot Street to Great Patrick Street.

Table 4.3

Number of public houses in Belfast City Centre* 2009-2016			
Use	**2009**	**2013**	**2016**
Pubs	20	23	23
Bars	17	28	27
Clubs/Nightclubs	5	10	12
Total	**42**	**61**	**62**

** GOAD's coverage applies to groundfloor uses in primary retail area, which in the case of Belfast includes the Retail Core and adjacent areas.*
Note: GOAD's survey area expanded in 2010 to include part of Cathedral Quarter

Figure 4.2: Long established bar in the Retail Core (Monicos, Lombard Street)

Cinema/theatres/concert halls

Cinema

Table 4.4 indicates that there are 7 cinemas in Belfast ranging in size from the Movie House, Cityside (14 screens) to Queen's Film Theatre (2 screens). Added to these there are small specialist showings in various locations e.g. Beanbag theatre on Hill Street linked to the Belfast Film Festival.

In keeping with the trend across Northern Ireland most of the cinemas are multiplexes (i.e. purpose-built venues with 5 or more screens).

Table 4.4

Cinemas in Belfast	
	No. of screens
Odeon Victoria Sq	8
Odyssey SSE Arena	12
Movie House Cityside	14
Movie House Dublin Rd #	10
Strand Cinema	4
Omniplex - Kennedy Centre	8
Queen's Film Theatre	2
Total	**58**
# Permission to redevelop as offices	

According to the British Film Industry's 2016 Statistical Yearbook Northern Ireland had the highest number of screens (11) per 100,000 people in the UK in 2015. This is even higher than the corresponding figure for London (7.6). From one perspective this finding may be interpreted as over-provision and might help explain why the Movie House on Dublin Road has obtained planning permission for redevelopment to offices.

Figure 4.3: Cinema on Dublin Rd with permission to redevelop as offices

Theatres and concert halls

Belfast City Centre is home to the 3 largest venues that primarily house theatre events in the form of stage drama. These are the Grand Opera House, the Lyric Theatre and the MAC Theatre in the Cathedral Quarter. The City Centre also accommodates the 3 largest locations for concert hall entertainment, namely the SSE Odyssey Arena, Waterfront Hall and Ulster Hall. In addition to these there are a number of smaller venues that facilitate arts and cultural events, including Black Box theatre, Belvoir Players Studio Theatre, Duncairn Centre for Arts and Culture, Crescent Arts Centre, Sabai Pavilion (Custom House Sq) and Mandela Hall. Events of this type have also been facilitated in places like Crumlin Road Gaol and Stormont Buildings. Indeed, there is even a pop-up theatre in the former Northern Bank building at Shaftesbury Square.

Figure 4.4: MAC Theatre in the Cathedral Quarter

Betting offices and gaming centres

There are approximately 80 betting offices in Belfast operated by national chains (e.g. William Hill, Paddy Power) and local firms (Sean Graham, McLeans). Table 4.5 reveals that there are 16 betting offices in the central part of Belfast in 2016, which is roughly the same proportion as the GB average (1.5% v 1.44% of total units). The table also reveals that this number has changed little since 2009.

Table 4.5

Number of gambling outlets in Belfast City Centre* 2009-2016			
Use	**2009**	**2013**	**2016**
Bingo & Amusements	8	9	7
Casinos & Betting Offices	15	15	16
Total	**23**	**24**	**23**
** GOAD's coverage applies to groundfloor uses in primary retail area, which in the case of Belfast includes the Retail Core and adjacent areas. Note: GOAD's survey area expanded in 2010 to include part of Cathedral Quarter*			

There are approximately 20 gaming centres (amusement arcades) in Belfast. Half of these are located in the City Centre, with most of the remainder located on arterial routes. Five of them are located in the retail core. Despite the advance of online gambling their numbers have remained fairly stable over the years. However, in recent times, larger units have become popular. While older premises typically contained around 50 fixed odds betting terminals (FOBTs) recent proposals now include 200 machines, as exemplified by the Onassis Amusements development on Queen Street.

Figure 4.5: City Centre Gaming Centre outside the Primary Retail Frontage (Onassis Amusements, Queen St)

Gyms, leisure centres, swimming venues

There are 7 leisure centres in Belfast owned by the Council but run privately by GLL under the “Better” brand. The leisure centres include Shankill, Andersonstown, Avoniel, Falls, Ballysillan, Olympia and Whiterock. Added to these the Council owns 2 Activity Centres (Belvoir and Brook), Loughside Recreation Centre, Grove Wellbeing Centre, Girdwood Community Hub and an indoor Tennis Centre and Ozone complex on the Ormeau embankment. The Council is also associated with the Better Gym at Connswater.

In addition to the above there are over 40 privately run gyms in Belfast and they operate from a range of locations, including retail/business parks, shopping/commercial streets and hotels. They range in quality from a minimal offer, exemplified by pure gym, to a fuller range of associated services (swimming, etc.) provided in facilities within retail parks and hotels. The preferred operating trend is to offer a pay as you gym service.

According to the Continuous Household Survey 2015/2016, carried out by NISRA, swimming is the most popular sport in Northern Ireland, with 19% of those surveyed stating that they participated in this sport at least once during the year.

Keeping fit by attending the gym or aerobic/dance classes, together with jogging, is the next most popular sport (15%) followed by cycling (11%). The survey also disclosed that 21% of people were members of a sports club – a figure that has changed little since 2007/2008.

4.3 Conclusion

Based on the foregoing information it is evident that leisure service uses are making an increasingly important contribution to the overall commercial functioning of the City. Examination of the planning database indicates that this trend is continuing, with most applications in the City Centre seeking to change from retail use to leisure service uses such as cafés, restaurants and gyms.

SECTION 5: SURVEY OF SHOPPING PATTERNS

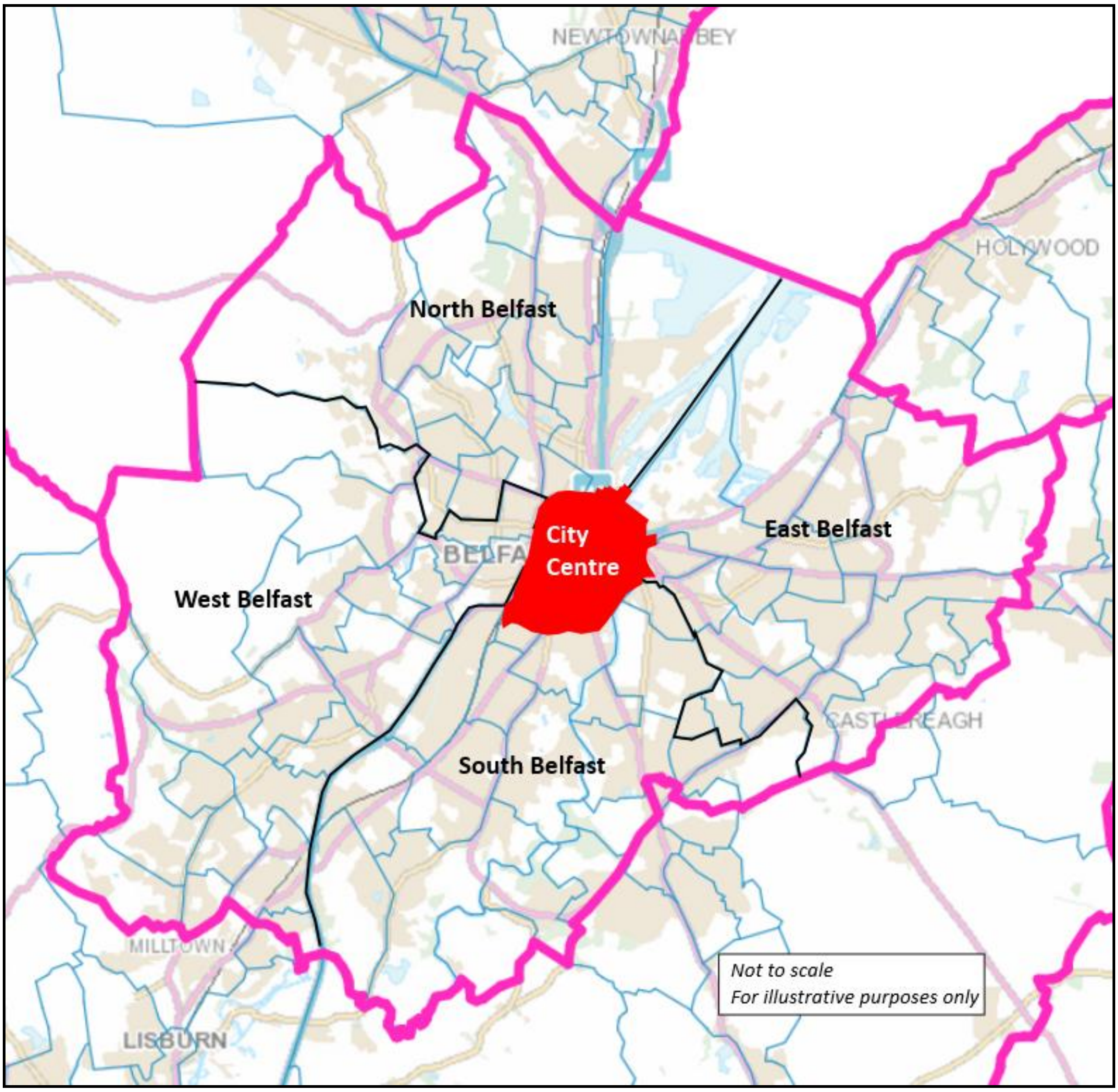
5.0 Introduction

An integral component of this Study was the carrying out of a household shopper survey of Belfast residents by an independent research company, namely Strategic Research and Insight Limited. It was commissioned by the Council in order to obtain a robust evidence-based understanding of shopping and leisure patterns in Belfast so that it can better plan for these uses and activities.

5.1 Methodology

The research involved a telephone survey of over 500 shopper households in the Council area. It was based on a stratified random sample of the population residing in North, West, South and East Belfast, as well as Belfast City Centre. Figure 5.1 shows the geographical coverage of these areas.

Figure 5.1: Survey area



In terms of reliability, the size of the sample accords with a 95 per cent confidence level, in that there is a standard 5 per cent margin for error in the findings. The number of persons surveyed from N, W, S, E and central

Belfast is shown in Table 5.1. Due to the relatively low number of people living in Belfast City Centre compared to the other parts of Belfast the return rate was considerably lower here.

Table 5.1

Location	Number of respondents
Belfast North	121
Belfast South	114
Belfast West	128
Belfast East	128
Belfast Centre	19
Total	**510**

Questionnaire

The survey consisted of 23 questions to be completed during a 10 minute phone call (a copy of the questionnaire is attached in Appendix 2). The questions were aimed at identifying shopper profiles, garnering shoppers' views and eliciting facts on shopping and leisure activity. This was especially important for the identification of shopping patterns in the area, in terms of establishing where people went shopping for their groceries and non-food items.

5.2 Survey results

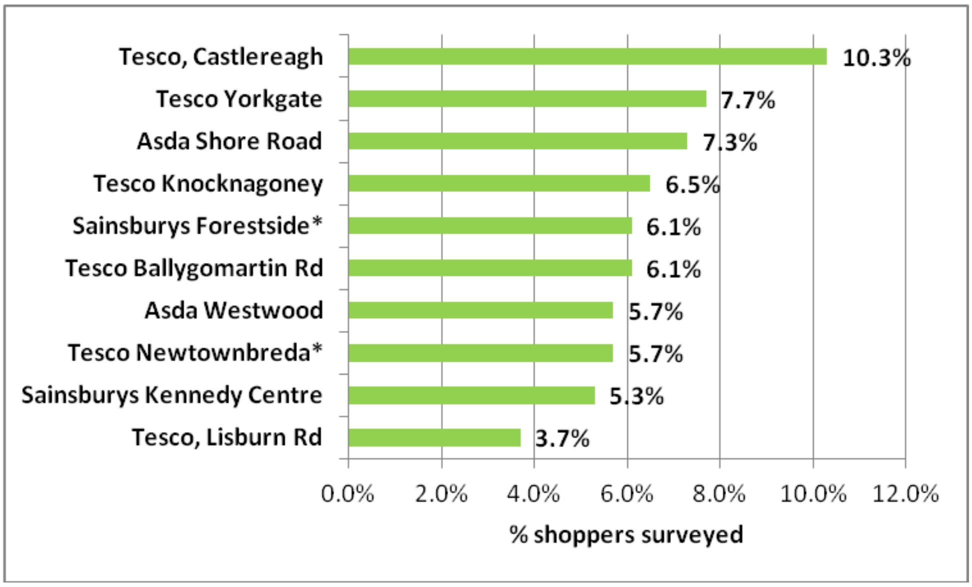
Aggregated results were provided for the sample size as a whole, together with detailed results for the different parts of Belfast. A summary of the aggregated results is provided in Appendix 3.

The main survey findings in respect of convenience goods shopping and comparison goods shopping are documented separately below.

5.21 Convenience goods shopping

Figure 5.2 indicates that Tesco is the most popular convenience goods destination for shoppers in Belfast, with Tesco Castlereagh recording the highest rating (10.3% of respondents do their main shopping there). Five of the 10 main food destinations in Belfast are a Tesco store, with one of these located outside the Council boundary at Newtownbreda.

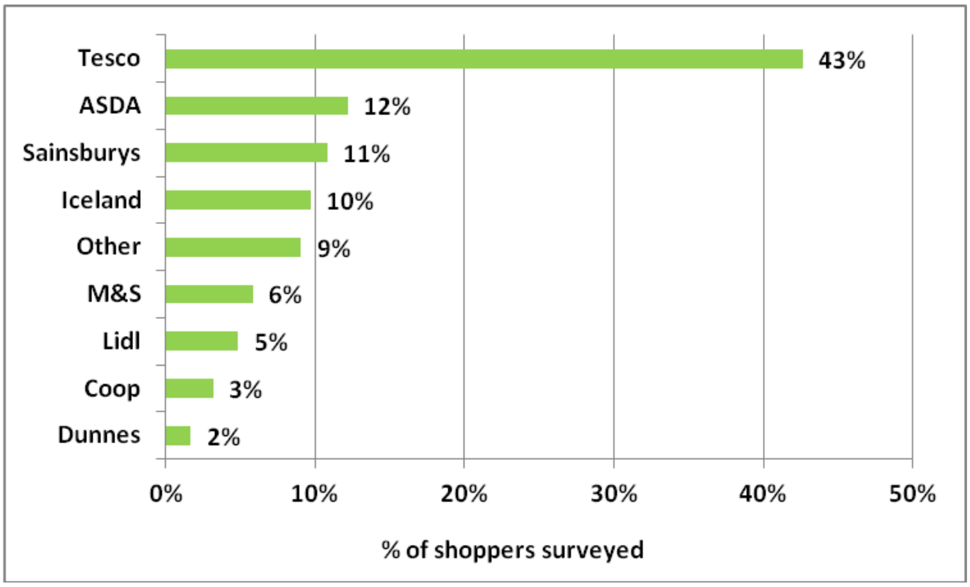
Figure 5.2: Main destination for grocery shopping



** located outside Belfast City Council boundary*

Based on the above results it can be inferred that Tesco enjoys the largest market share of grocery shopping in Belfast. Its' market share (43%) exceeds the combined market share of ASDA, Sainsburys and M&S (see Figure 5.3).

Figure 5.3: Estimated grocery market share from survey findings

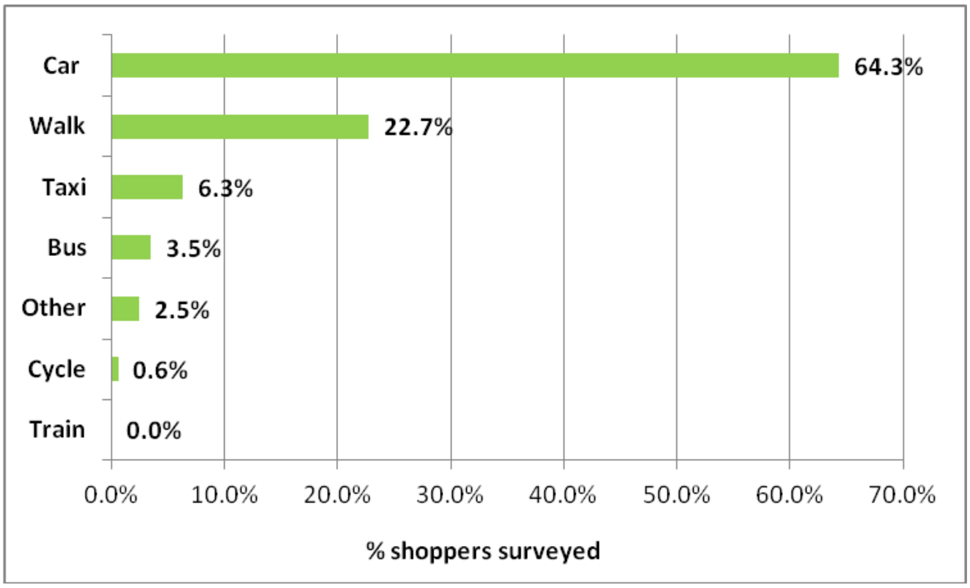


Viewed from another perspective Tesco, ASDA and Sainsburys command two thirds of the grocery market in Belfast.

Mode of travel & Journey time

In keeping with national trends the car is the most popular form of transport for food shopping trips (64.3%), followed by walking (22.7%) and taxi (6.3%). The high incidence of walking reflects the comparatively low level of car ownership in Belfast relative to the NI average, as well as the pedestrian accessibility of stores to the community. According to the 2011 census the proportion of households without a car or van in Belfast City was nearly twice the average for NI (40% v 22.7%).

Figure 5.4: Mode of travel



The overriding majority of food trips (83.4%) take 15 minutes or less to undertake.

Reason for store selection
Convenience of location is the main reason for food shopping at a particular location (69.4% of respondents said this), followed by the wide range of goods available (21.2%) and reasonable prices (18.4%).

Expenditure
The survey results suggest that approximately 8 in 10 households in Belfast spend between £20 and £100 on their weekly groceries bill, giving an inferred median figure of approximately £60 per household. Caution should always be applied to telephone responses of this type, especially given that the figure compares unfavourably with the finding for the 2016 UK Living Costs and Food Survey. It recorded that the average household in the UK spent £80 on convenience goods. Even allowing for the fact that household size in Britain is higher than in Belfast (2.4 v 2.3 in 2016/2017) this is still a considerable difference.

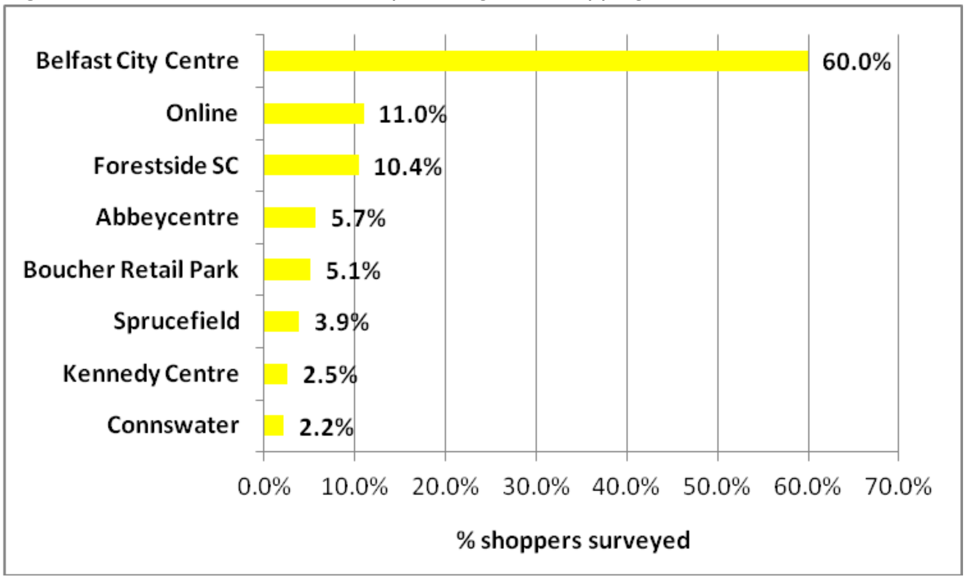
Online food shopping
While only 1.8% of the sample stated that they did all their main food shopping online 12.5% stated that they did an element of it online. The latter proportion increases to 19% when confined to the sample population aged under 50.

5.22 Comparison goods shopping

The principal survey findings in relation to comparison goods shopping are recorded below.

Main non-food shopping location
Belfast City Centre is the most popular destination for comparison goods shopping (60%). Significantly, online shopping rates next highest (11%), followed by Forestside (10.4%), Abbeycentre (5.7%) and Boucher Retail Park (5.1%).

Figure 5.5: Main destination for comparison goods shopping



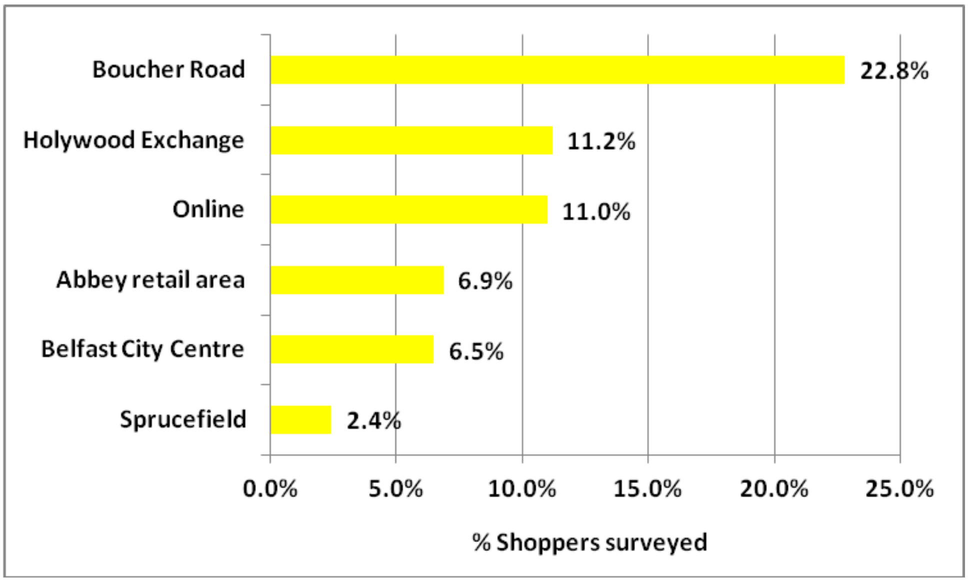
Reason for centre selection
As the term suggests comparison goods shopping involves comparing the quality and price of goods. Accordingly, the range of goods available was cited as one of the main reasons (36.1%) for choosing to shop at a particular location, together with the convenience of the location (38.4%).

Relationship with other uses
When shopping for comparison goods roughly half of people (50.2%) also go for something to eat or drink. This finding far exceeds the tendency to also visit food shops and other units (9.0% and 6.1% respectively).

Online non-food shopping
Some 11% of those surveyed stated that they did most of their comparison goods shopping online, including for bulky goods items. Unfortunately, the survey had to be succinct, which prevented further probing to ascertain the specific click and collect proportion of this figure.

Bulky goods shopping
The survey revealed that Boucher Road (22.8% of sample) is the principal location for bulky goods shoppers in Belfast. Clearly other locations which accommodate the grouping of large retail units, including Holywood Exchange (11.2%), represent the greatest attraction for bulky goods shoppers.

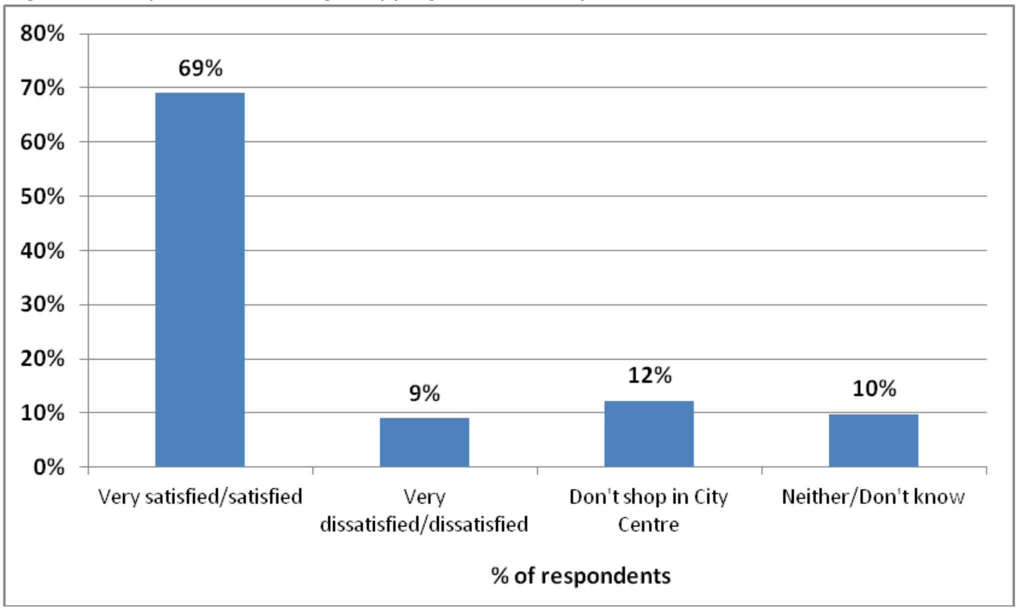
Figure 5.6: Main destination for bulky goods shopping



5.23 Views on City Centre

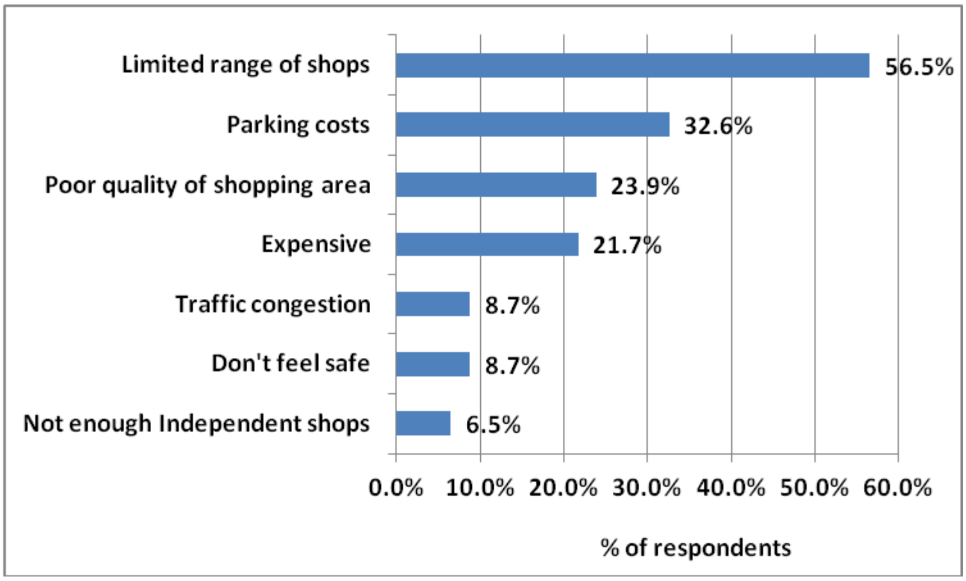
Some 69% of the 500 plus people interviewed stated that they were satisfied/very satisfied with shopping facilities in Belfast City Centre (Figure 5.7). This finding chimes with a Dec 2015 BCCM survey of over 250 shoppers which indicated that two thirds of people thought that the City Centre had a considerable number of quality retail stores.

Figure 5.7: Opinion on existing shopping in Belfast City Centre



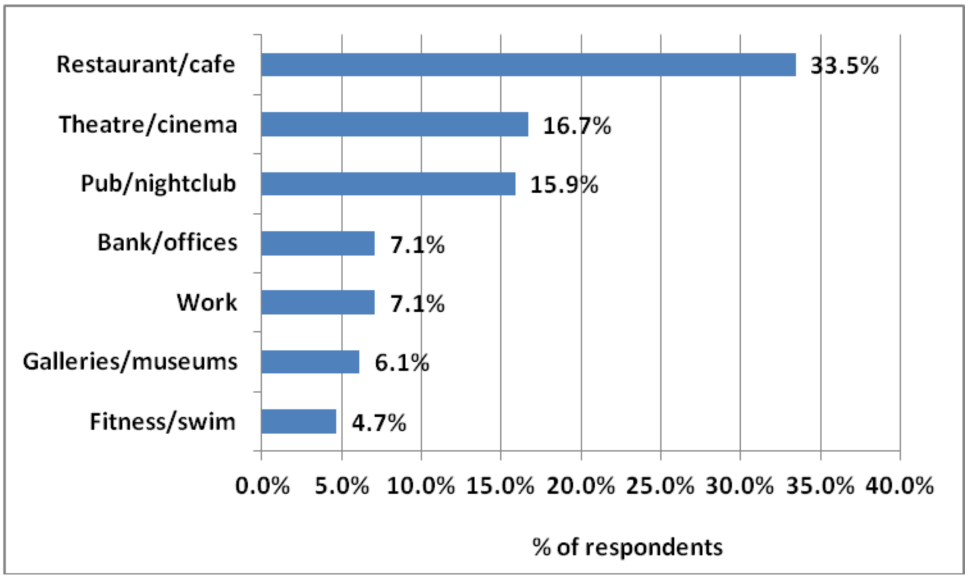
From the small percentage of people who expressed dissatisfaction with shopping in Belfast City Centre over half (56.5%) of these cited a limited range of shops, while nearly a third (32.6%) pointed to parking costs.

Figure 5.8: Reasons for dissatisfaction with City Centre



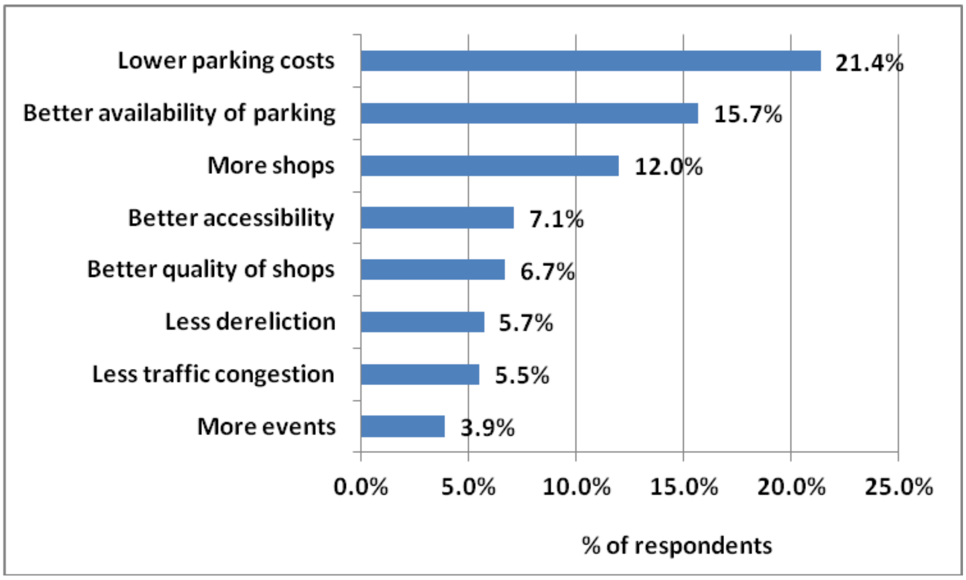
After shopping, eating out is the next popular reason for visiting the City Centre (33.5%), followed by going to the theatre/cinema (16.7%) and to a pub/nightclub (15.9%).

Figure 5.9: Reason for visiting City Centre outside of shopping



When questioned on how the attractiveness of the City Centre could be improved, lower parking costs (21.4%) featured top of the list. So too, the introduction of more shops (12%) was suggested as a means of improving the appeal of the City Centre.

Figure 5.10: Suggestions for improving the attractiveness of Belfast City Centre



5.3 Conclusion

In conclusion it is worth recalling the main findings of the survey below.

- In terms of the convenience goods sector Tesco enjoys the largest market share of grocery shopping in Belfast. Its share (43%) exceeds the combined market share of ASDA, Sainsburys and M&S.
- Belfast City Centre is still the most popular destination for comparison goods shopping for the people of Belfast (60% of respondents stated this). Significantly, online shopping is next highest (11%), followed by Forestside (10.4%), Abbeycentre (5.7%) and Boucher Retail Park (5.1%).
- When shopping for comparison goods roughly half of people (50.2%) also go for something to eat or drink.
- Boucher Road is the principal location for bulky goods shoppers in Belfast (22.8%). It is twice as popular as Holywood Exchange (11.2%).
- Most of the 500 plus people interviewed (69%) stated that they were satisfied/very satisfied with shopping facilities in Belfast City Centre.
- When asked how the attractiveness of the City Centre could be improved to encourage visits, lower parking costs (21.4%) and more shops (12%) featured prominently.

SECTION 6: RETAIL CAPACITY ASSESSMENT

6.0 Introduction

This section of the Study assesses the capacity of Belfast to accommodate additional retail space during the lifetime of the Local Development Plan 2035 (LDP). While the assessment focuses on estimating quantitative need, in terms of outlining potential retail floorspace requirements, it also considers the issue of qualitative need, in terms of appraising opportunities to expand the range and choice of shopping in Belfast City Centre.

6.1 Quantitative retail needs assessment

The assessment estimates the capacity for retail floorspace in Belfast up to the year 2035. It does this by examining the interplay of factors relating to population change, expenditure and turnover.

6.11 Approach to projecting retail floorspace need

In the interest of sensitivity testing and of incorporating flexibility into the assessment, the capacity for additional retail and leisure development is estimated on the basis of population projections in the Local Development Plan (LDP) and on the basis of low population forecasts by NISRA. This is carried out for both convenience goods shopping and comparison goods shopping.

LDP population forecasts take on board the prospect of a marked uplift in the local economy and a concomitant increase in population as the labour market improves, tourism increases and a new university campus emerges. This state of affairs will generate additional expenditure from new residents, workers and students, as well as from visitors. In terms of retailing and leisure services specifically, recognition of the LDP population forecast is particularly warranted on the strength of Belfast's status as the regional capital. Its commercial primacy means that its catchment extends well beyond its Council boundaries. As the largest retail centre in Northern Ireland the principal catchment of Belfast approximates to a 30 minute drive-time and encapsulates a population of circa 600,000 people. This size of catchment places Belfast on a comparable footing with Nottingham and Edinburgh. Mindful of all these considerations, the Preferred Options Paper (POP) for the LDP estimates that the population of Belfast could grow by over 56,000 persons between 2017 and 2035.

6.12 Population base for projections

Despite having a catchment appeal that extends beyond its Council boundaries the capacity assessment is restricted to the resident population within the City Council boundary (346,592 in 2017 according to the LDP). This approach is justified on the basis that other Councils will be undertaking their retail capacity studies for their own resident populations. This is particularly important in respect of neighbouring councils like Lisburn & Castlereagh and Antrim & Newtownabbey. They would have reason to contend that they are equally entitled to compete for a share of shopping expenditure generated by their own electoral populations.

6.13 Population forecasts

The latest 2014 based population projections from NISRA for the years 2017 to 2035 estimate that population growth in Belfast during this period will be 3.5% in total, which is even lower than that for NI as a whole (3.9%). In

Table 6.1

Population forecasts for Belfast City Council area 2017-2035				
	Number of persons			
Forecast	2017	2035	Actual change	% Change
Low	341,200	353,000	11,800	3.5%
LDP	346,592	402,722	56,130	16.2%
Low forecast equates to an annual rate of change of 0.19% per year				
LDP forecast equates to an annual rate of change of 0.90% per year				

contrast, the Council's LDP population forecast for the same period is appreciably more positive in outlook, with growth estimated at 16.2%, increasing from 346,592 to 402,722 (Table 6.1).

6.14 Expenditure per head

Information at the national level exists for various categories of consumer expenditure. However there is no specific breakdown for expenditure on convenience goods and comparison goods from central government. Instead, these figures are sourced from a number of bodies such as Experian and Pitney Bowes. These organisations build upon data collected by the Office for National Statistics, including the UK Living Costs and Food Survey and its related Consumer Trends publication.

Accordingly, expenditure per head figures specific to Belfast for both convenience goods and comparison goods shopping were retrieved from Experian. These figures are outlined in Table 6.2 and are inclusive of expenditure made online. The table shows that annual expenditure per head on convenience goods in Belfast is currently estimated at £2,274.50. This level of expenditure is not expected to change much in the future given that projected real growth in expenditure on convenience goods up to 2035 is anticipated to be negligible.

The table also shows that the amount of money spent on comparison goods in Belfast in 2017 is estimated at £3,441.56. By the year 2035 this will increase appreciably to £5,859.02 based on a projected real growth rate of 3% per year.

Table 6.2

Annual retail expenditure per head estimates (2015 Prices)		
	2017	**2035**
Convenience Goods	£2,274.50	£2,274.50
Comparison Goods	£3,441.56	£5,859.02

Sources: Local Experian data for Belfast 2015
Projected on basis of long term forecast of zero annual change in expenditure
on Convenience goods and 3% annual growth on Comparison goods
as outlined in Figure 2, Experian Retail Planner Briefing Note 14, November 2016

6.15 Impact from online shopping - Special forms of trading

At present, online shopping for convenience items accounts for 3.2% of expenditure and this is anticipated to increase only marginally to 5.3% by the year 2035. In contrast, online shopping for comparison goods is much higher at 13.8% and is envisaged to increase to 16.5% by the year 2035. These percentage figures take into account the fact that a proportion of online shopping will still be delivered from a shop.

Table 6.3

Proportion of shopping from online sales*		
	Convenience goods	Comparison goods
2017	3.2%	13.8%
2035	5.3%	16.5%

** Online sales not sourced from shops*
Source: Appendix 3, Experian Retail Planner Briefing Note 14, November 2016

6.16 Available expenditure on Convenience goods

By multiplying the population figures with expenditure per capita figures, the total level of expenditure on both convenience goods and comparison goods within the Council area can be estimated. This is carried out on the basis of a low population forecast by NISRA and on the basis of the Council's population projections in the LDP.

Low growth forecast

It can be seen from Table 6.4 that the total expenditure available for convenience goods, less that assigned to Special Forms of Trading, presently amounts to £751m. It is forecast to grow only slightly to £760m by the year 2035 – an increase of £9m.

Table 6.4

Estimated growth in expenditure on convenience goods in Belfast between 2017 and 2035 (Low Forecast*)				
Year	**Population**	**Per capita expenditure**	**Total expenditure**	**Total expenditure less SFT #**
2017	341,200	£2,274.50	£776,059,400	£751,225,499
2035	353,000	£2,274.50	£802,898,500	£760,344,880
Growth in expenditure on convenience goods 2017-2035				**£9,119,380**

** Based on **NISRA's population projections** for Belfast*

 # Special Forms of Trading (SFT) comprises mainly internet sales (3.2% in 2017, 5.3% in 2035) that are not sourced from shops

SFT proportions sourced from Appendix 3 of the Experian Retail Planner Briefing Note 14 (Nov 2016)

Note: Please allow for minor differences due to computerised rounding up of data.

LDP forecast

When the same expenditure projections are rerun on the basis of the Council's population forecasts in the LDP it can be seen from table 6.5 that the growth in expenditure on convenience goods could amount to £104m by the year 2035.

Table 6.5

Estimated growth in expenditure on convenience goods in Belfast between 2017 and 2035 (LDP Forecast*)				
Year	**Population**	**Per capita expenditure**	**Total expenditure**	**Total expenditure less SFT #**
2017	346,592	£2,274.50	£788,323,504	£763,097,152
2035	402,722	£2,274.50	£915,991,189	£867,443,656
Growth in expenditure on convenience goods 2017-2035				**£104,346,504**

** Based on **Council's population projections** for Belfast in Local Development Plan 2035*

 # Special Forms of Trading (SFT) comprises mainly internet sales (3.2% in 2017, 5.3% in 2035)

SFT proportions sourced from Appendix 3 of Experian Retail Planner Briefing Note 14 (Nov 2016)

Note: Please allow for minor differences due to computerised rounding up of data.

6.17 Available expenditure on Comparison goods

The amount of available expenditure for comparison goods shopping is estimated below on the basis of the same low and LDP growth forecasts.

Low growth forecast

Even on the basis of a low population growth forecast the respective increase in expenditure on comparison goods is estimated to be significantly higher at £714m, growing from £1 billion in 2017 to £1.7 billion in 2035.

Table 6.6

Estimated growth in expenditure on Comparison goods in Belfast between 2017 and 2035 (Low Forecast*)				
Year	**Population**	**Per capita expenditure**	**Total expenditure**	**Total expenditure less SFT #**
2017	341,200	£3,441.56	£1,174,260,272	£1,012,212,354
2035	353,000	£5,859.02	£2,068,234,060	£1,726,975,440
Growth in expenditure on comparison goods 2017-2035				**£714,763,086**

** Based on **NISRA's population projections** for Belfast*

 # Special Forms of Trading (SFT) comprises mainly internet sales (13.8% in 2017, 16.5% in 2035)

SFT proportions sourced from Appendix 3 of Experian Retail Planner Briefing Note 14 (Nov 2016)

Note: Please allow for minor differences due to computerised rounding up of data.

LDP forecast

When the Council's population forecasts in the LDP are incorporated into the analysis it is estimated that expenditure growth on comparison goods shopping could total £942m by the year 2035 (Table 6.7).

Table 6.7

Estimated growth in expenditure on Comparison goods in Belfast between 2017 and 2035 (LDP Forecast*)				
Year	**Population**	**Per capita expenditure**	**Total expenditure**	**Total expenditure less SFT #**
2017	346,592	£3,441.56	£1,192,817,164	£1,028,208,395
2035	402,722	£5,859.02	£2,359,556,252	£1,970,229,471
Growth in expenditure on comparison goods 2017-2035				**£942,021,076**

** Based on **Council's population projections** for Belfast in Local Development Plan 2035*

 # Special Forms of Trading (SFT) comprises mainly internet sales (13.8% in 2017, 16.5% in 2035)

SFT proportions sourced from Appendix 3 of the Experian Retail Planner Briefing Note 14 (Nov 2016)

Note: Please allow for minor differences due to computerised rounding up of data.

6.18 Turnover

Outside of published turnover results for selected retail chains in company listings, no authoritative source on turnover information is available in Britain and Ireland. It is a significant statistical deficiency that undermines the reliability of retail floorspace projections across the board.

Notwithstanding this shortcoming, Experian provides estimates of turnover sales densities up to the year 2035 for both convenience and comparison goods. These figures are outlined in Table 6.8.

Table 6.8

Estimated turnover per net sqm (Sales Density)		
Retail type	**2017**	**2035**
Convenience goods shopping	£9,077	£9,040
Comparison goods shopping	£4,893	£6,387
Source: Figures 4a and 4b, Experian's Retail Planner Briefing Note 14, Nov 2016		

These turnover figures incorporate real changes in turnover growth brought about by improved efficiencies in the use of floorspace.

6.2 Projected retail capacity

Taking into account the above considerations it is possible to estimate the capacity of Belfast to accommodate new retail development up to 2035 for both convenience goods and comparison goods. As explained previously, a range of floorspace need is estimated based on a low population projection by NISRA and based on the Council's population projection for Belfast in the LDP. These equate to population growth rates of 0.19% per year and 0.90% per year respectively.

It is also assumed for the purpose of the capacity assessment that the retail market for convenience and comparison goods is in 'equilibrium' at the base year 2017. In other words, while it is recognised that some stores and centres may be underperforming or overtrading, it is assumed for projection purposes that they are trading at normal turnover levels.

Table 6.9

Capacity for additional retail floorspace in Belfast 2017-2035 (Low forecast)				
Convenience goods	**Year**	**Total expenditure**	**Turnover per net sqm (Sales Density)**	**Calculated net sqm***
	2017	£751,225,499	£9,077	82,761
	2035	£760,344,880	£9,040	84,109
			Capacity for additional floorspace	**1,348**
Comparison goods	**Year**	**Total expenditure**	**Turnover per net sqm (Sales Density)**	**Calculated net sqm**
	2017	£1,012,212,354	£4,893	206,870
	2035	£1,726,975,440	£6,387	270,389
			Capacity for additional floorspace	**63,519**
			Total capacity	**64,867**

** Note: The calculated net sqm figure for 2017 is a working figure for projection purposes only. It is not the actual floorspace figure on the ground. Please allow for minor differences due to computerised rounding up of data.*

Low growth forecast
Building upon information tabulated above it can be shown on the basis of a low population growth forecast that only 1,348 net sqm of new convenience goods floorspace is required up to 2035 (Table 6.9). In contrast, the capacity for additional comparison goods floorspace in Belfast amounts to 63,519 net sqm by the same year.

LDP forecast
When the above table is reworked on the basis of LDP predictions for population growth in Belfast the floorspace capacity for convenience goods increases to 11,887 net sqm, while the capacity for comparison goods shopping increases to 98,336 net sqm (Table 6.10).

Table 6.10

Capacity for additional retail floorspace in Belfast 2017-2035 (LDP forecast)				
Convenience goods	**Year**	**Total expenditure**	**Turnover per net sqm (Sales Density)**	**Calculated net sqm***
	2017	£763,097,152	£9,077	84,069
	2035	£867,443,656	£9,040	95,956
			Capacity for additional floorspace	**11,887**
Comparison goods	**Year**	**Total expenditure**	**Turnover per net sqm (Sales Density)**	**Calculated net sqm**
	2017	£1,028,208,395	£4,893	210,139
	2035	£1,970,229,471	£6,387	308,475
			Capacity for additional floorspace	**98,336**
			Total capacity	**110,223**

** Note: The calculated net sqm figure for 2017 is a working figure for projection purposes only. It is not the actual floorspace figure on the ground. Note: Please allow for minor differences due to computerised rounding up of data.*

The calculations in the above tables are summarised below. Overall, therefore, it is estimated that there is capacity to add a total of 64,867-110,223 net sqm of retail floorspace to Belfast during the period of the LDP.

Table 6.11

Capacity for additional retail floorspace in Belfast 2017-2035		
	Capacity (Net sqm)	
	Low forecast	**LDP forecast**
Convenience goods	1,348	11,887
Comparison goods	63,519	98,336
Total	**64,867**	**110,223**

The results of this retail capacity assessment clearly have implications for the planning of retail development in Belfast. These implications relate to the scale, type, location and phasing of future development and these matters are considered at the end of this Study in Section 9.

6.21 Cumulative considerations – retail proposals
As part of the capacity assessment it is necessary to broadly examine the number and scale of extant permissions for retail development in Belfast. In the main, this relates to the identification of major projects of 1,000 gross sqm or more. At the outset it must be acknowledged that it is difficult to be definitive with extant proposals, in terms of their detail and likelihood of implementation. In many cases, planning permission is sought

for multiple sites in response to market interest. This has been acutely demonstrated in Derry/Londonderry in recent years when various locations were granted planning permission for superstore development in the hope of accommodating an ASDA store. However, as it transpired, none of these permissions were subsequently developed.

6.22 Permitted comparison and convenience goods floorspace
Examination of the Planning NI database from the year 2010 reveals the following retail trends in Belfast:

- Most retail permissions in the City Centre relate to small, groundfloor units proposed as part of major development associated with student housing, hotels and mixed schemes use e.g. Bedford Square.

- The additional floorspace contribution of the above retail units is generally negated by the loss of retail units to other uses. This pertains to change of use permissions to convert retail units to commercial and leisure service use, with the latter including restaurant/café and gym use.

Notwithstanding the above, there are a number of major proposals for retail development which this capacity assessment should be mindful of. These are outlined below.

<u>NE Quarter</u>
By far the largest amount of retail floorspace earmarked for Belfast relates to the regeneration of the northeast quarter formerly referred to as Royal Exchange. For the most part it encompasses a triangular area bordered by Royal Avenue, Donegall Street and Rosemary Street. A total of 110,000 sqm of mixed use redevelopment is proposed for this location, including 23,000 sqm of retail space and 3,000 sqm of cafe/restaurant space. A previous planning permission (Z/2010/1532/F) for mixed use development on this land by a previous owner expires in October 2017.

<u>Extension of Primark</u>
Primark is in the process of extending its store along Castle Street. On paper it is extending its store by 4,400 net sqm but a fair proportion of this involves the incorporation of demolished shop space on Castle Street (Figure 6.1a).

Figures 6.1(a) and (b): Extension of Primark

<u>District Centres</u>
The Westwood District Centre has permission for Phase 2 development on the site, comprising 18 units totalling 11,329 net sqm of comparison goods floorspace. Added to this, the existing ASDA store at Westwood has permission to move into a larger store that will provide approximately 1,000 net sqm of additional floorspace.

Outline planning permission S/2015/0025/O also exists to redevelop the Dairy Farm District Centre for a broad mix of masterplan uses including a transport hub, education and health facilities. It also includes provision for 8,820 net sqm of commercial floorspace (A1, A2 and B1) and a leisure centre (6,285 sqm). Under this Masterplan the existing shopping centre will be replaced by a block of retail warehouse-type units similar to those at Westwood. In many respects the commercial floorspace permitted will replace floorspace that already exists.

Boucher area

Outside of the above the Boucher area still attracts considerable interest for retail development. Part of this development in recent years has involved retailers seeking to build their own freestanding stores separate from retail parks. For the most part these developments do not therefore constitute additional floorspace e.g. Starplan and Creations relocating from Lesley Retail Park and Shane Retail Park respectively.

Shane Retail Park has permission to build another 1,350 net sqm retail warehouse on part of its car park.

Permission also exists to build a 782 net sqm convenience store on the Gilbert Ash site.

6.23 Implications of extant permissions for Capacity Assessment

The review of extant permissions indicates that there is little by way of hard commitments in the pipeline. Hard commitments refer to those schemes that are approved and have a high likelihood of being built on the basis of securing a main end-user in advance of development.

Nonetheless, if the extant permissions are taken at face value and assumed to be implementable, it can be shown in Table 6.12 that extant approvals for convenience goods floorspace at the Westwood Centre and in Boucher would account for the low capacity convenience goods forecast up to 2035 (denoted by the minus 434 net sqm reading). This finding highlights the importance of incorporating flexibility into projections and providing a range of floorspace capacity for future development.

The above finding is most unlike the situation for comparison goods shopping. Even ignoring the reality that some of the proposed comparison goods floorspace will actually replace existing floorspace it can still be illustrated in Table 6.12 that a low capacity forecast will comfortably accommodate the proposals listed (63,519 net sqm capacity versus 48,889 net sqm proposed).

Table 6.12

Impact of extant retail permissions on Capacity for additional retail floorspace in Belfast 2017-2035		
Convenience goods net sqm	**Low forecast**	**LDP forecast**
Capacity for additional net sqm (A)	1,348	11,887
Westwood District Centre	1,000	1,000
Boucher convenience store	782	782
Total permitted (B)	1,782	1,782
Net capacity (A-B)	**-434**	**10,105**
Comparison goods net sqm	**Low forecast**	**LDP forecast**
Capacity for additional net sqm (A)	63,519	98,336
NE Quarter, Belfast City Centre	23,000	23,000
Primark Extension, City Centre	4,400	4,400
Westwood District Centre	11,329	11,329
Dairy Farm District Centre	8,820	8,820
Boucher	1,350	1,350
Total permitted (B)	48,899	48,899
Net capacity (A-B)	**14,620**	**49,437**

In summary, therefore, while it is less certain which permissions will actually be built this capacity assessment provides certainty that, based on the LDP forecast, there will be adequate capacity to accommodate all extant permissions and future proposals.

6.3 Qualitative retail needs assessment

Belfast City Centre
A qualitative assessment into the range and choice of shopping available in Belfast City Centre was carried out by Deloitte (Javelin) in 2015. It noted that, according to Venuescore, Belfast ranked 18th out of 22 major cities in the UK in 2014. It had previously been ranked 14th in 2008 with the opening of Victoria Square.

The key findings of its Belfast City Centre Retail Positioning Study 2015 are outlined below:

- Belfast city centre is relatively well-provided for in Clothing & Accessories and Health & Beauty though a declining proportion of spend on clothes and accessories will go through the stores over the next 5 years.

- Leisure goods, household and electrical and furniture items are all relatively under-provided for. Although many of these goods are typically found outside the City Centre they are also provided by Department stores such as John Lewis.

- Compared to other major cities Belfast is under-represented in accommodating prestigious retail chains (e.g. Harvey Nichols, FCUK).

- Belfast city centre is relatively under-represented in department store space and Medium Sized Units (MSUs).

- The attraction of another Department Store development, notably by John Lewis, would create opportunities for mid to upper-mid market retailers to fill qualitative gaps in provision.

6.4 Conclusion

The findings of this assessment demonstrate that Belfast has appreciable capacity to add to its retail stock over the period of the plan. Ideally, this capacity should be targeted at attracting retailers not currently trading in the City so that the range and choice of shopping available to consumers can be enhanced. In so doing, it would bolster the profile of Belfast as a “major city” shopping destination.

SECTION 7: LEISURE CAPACITY ASSESSMENT

7.0 Introduction

While sufficient indices exist to formulate a broad supply and demand analysis for the sale of retail goods (i.e. convenience and comparison goods) the same cannot be said for leisure service uses. The absence of standardized sales density figures (turnover data) for the wide range of leisure services considered militates against this. Notwithstanding this shortcoming, it is possible however to give an indication of the likely increase in the amount of expenditure available for leisure service uses in Belfast, from which future capacity for growth can be inferred.

As stated earlier in Section 3 of this Study the term leisure service refers to the following uses:

- Restaurant/cafe/fast food takeaway – eating out
- Public houses/bars/clubs – socialising with a drink
- Cinema, theatres and concert halls – entertainment
- Betting offices, gaming centres, bingo – gambling
- Gyms, leisure centres, swimming venues – recreation

For the purpose of expenditure forecasting, hairdressing and personal grooming shops are also regarded as leisure service uses, even though they are strictly classified as A1 retail service uses under planning legislation.

7.1 Leisure services expenditure per head

According to local figures provided by Experian it is estimated that annual expenditure for these services in Belfast amounts to £2,015 per head of population. Table 7.1 shows that nearly two thirds of this expenditure (65.6%) is spent on eating out.

Table 7.1

Annual leisure expenditure per head in Belfast 2017 (2015 prices)		
Public houses/bars/clubs/cinema, theatre & concert halls*	£248.85	12.3%
Betting offices, gaming centres, bingo – gambling	£225.50	11.2%
Gyms, leisure centres, swimming venues – recreation	£86.97	4.3%
Hairdressing/personal grooming	£132.12	6.6%
Restaurant/cafe/fast food takeaway – eating out	£1,321.71	65.6%
Total	**£2,015.14**	**100%**

Source: Local figures for Belfast provided by Experian
** Entertainment and socialising with a drink combined*

7.2 Leisure services expenditure in Council area

Experian estimate that real growth in expenditure on leisure services will average 1.3% per year up to 2035. Viewed in conjunction with the low and LDP population forecasts estimated by NISRA and the Council, tables 7.2 and 7.3 suggest that over the next 18 years expenditure on leisure services within the Council area could range between £209m and £325m. This translates into a percentage growth of between 31% and 47% on 2017 levels.

Table 7.2

Estimated growth in expenditure on Leisure service uses in Belfast between 2017 and 2035 (Low forecast*)			
Year	**Population**	**Per capita expenditure**	**Total expenditure**
2017	341,200	£2,015.14	£687,565,768
2035	353,000	£2,542.58	£897,530,740
Growth in expenditure on leisure service uses 2017-2035			**£209,964,972**
** Low growth forecast is based on NISRA population projections for Belfast Taking into account annual real growth in expenditure on leisure services of 1.3% as recorded in Figure 2 of Experian's Retail Planner Briefing Note 14 (November 2016)*			

Table 7.3

Estimated growth in expenditure on Leisure service uses in Belfast between 2017 and 2035 (LDP forecast*)			
Year	**Population**	**Per capita expenditure**	**Total expenditure**
2017	346,592	£2,015.14	£698,431,403
2035	402,722	£2,542.58	£1,023,952,903
Growth in expenditure on leisure service uses 2017-2035			**£325,521,500**
** Based on Council's population projections in Local Development Plan 2035 Taking into account annual real growth in expenditure on leisure services of 1.3% as recorded in Figure 2 of Experian's Retail Planner Briefing Note 14 (November 2016)*			

7.3 Development implications of growth in expenditure on Leisure Services

Unlike capacity assessments for retail development, which can build upon turnover figures to estimate floorspace requirements, there is little authoritative turnover data for leisure service uses on which to do likewise. This is due to the varied mix of leisure services involved and the fact that, unlike retail sales, turnover for most leisure services is not directly linked to volume sales from net floorspace.

This notwithstanding an attempt is made below to estimate the potential consequences for the built environment related to a projected increase in expenditure on leisure services. This is carried out for each category of leisure service use outlined earlier.

Restaurants/cafes/fast food

Based on the breakdown of expenditure listed in Table 7.1 it can be estimated that future expenditure on eating out will continue to rise and will correspondingly justify the requirement for more restaurant/cafe floorspace.
Some retail studies have attempted to estimate future floorspace requirements of eateries by employing sales densities of between £2,000 and £5,000 per net sqm. However, calculations based on these sales densities give hugely exaggerated floorspace requirements when read in the context of existing provision in Belfast. Accordingly, it is recommended that future requirements are based on the inference that if expenditure in these outlets is set to increase between 31% and 49% by 2035 then the number of eateries will increase at an exponential rate.

Public houses/bars/clubs

According to the 2013 survey into Adult Drinking Patterns in NI by the Information Analysis Directorate of the Health and Social Services department 20% of people interviewed had a drink in a pub during the week prior to survey. This was half that figure recorded in 1999. Most people prefer to drink at home (65% of those surveyed stated this) and this partly explains why the pub trade in NI as a whole is finding it a challenging environment.

Nonetheless, compared to the rest of Northern Ireland, where one in four pubs is struggling to stay open (Begbies Traynor, 2016) the pub trade in Belfast City Centre is performing quite well (Hospitality Ulster, 2016). The expected arrival of thousands of students to the north east of the City Centre is likely to improve this state of affairs. Their impending arrival has encouraged Wetherspoons to obtain planning permission to open a pub on the former JJB Sports outlet on Royal Avenue. A bar also features in the proposed hotel development on 9-13 Waring Street.

The household survey indicated that socialising by going for a drink was one of the main reasons for visiting the City Centre at night. Viewed in this context, it is clear that the pub trade is a key component of the leisure service sector in Belfast City centre and its retention and accommodation should be encouraged.

Cinemas

Overall, UK cinema attendances have remained relatively stable since 2006. If this trend continues the future capacity for cinema development can be estimated on the basis of projected population growth for Belfast.

As noted in Section 3 of this Retail Study Northern Ireland had the highest number of screens (11) per 100,000 people in the UK according to the British Film Industry's Statistical Yearbook 2016. If it assumed that this trend will continue in the foreseeable future it can be estimated on the basis of the LDP population forecast that Belfast could accommodate another 6-screen multiplex cinema by 2035 (Table 7.4). When the same analysis is conducted on the basis of a low population growth scenario, capacity in Belfast up to 2035 only amounts to a single screen cinema.

Table 7.4

Capacity for additional cinema screens in Belfast 2035		
LDP population growth forecast		
A	Population Growth 2017-2035	56,130
B=A/100,000	Population Growth per 100,000	0.5613
C	No. of screens per 100,000	11
D=B*C	Additional screen capacity by 2035	6
Low population growth forecast		
A	Population Growth 2017-2035	11,800
B=A/100,000	Population Growth per 100,000	0.118
C	No. of screens per 100,000	11
D=B*C	Additional screen capacity by 2035	1

Theatre/concert halls
The comparatively recent development of the MAC Theatre and extension of the Waterfront Hall may well have satisfied demand for these facilities for the foreseeable future. Nonetheless, any spare capacity for the introduction of additional theatre and concert hall space in Belfast City Centre would appear to be linked to opportunities in major mixed use development schemes near the River Lagan, including in the East Bank and Titanic Quarter.

Betting offices, gaming centres, bingo
Betting offices
The NI Gambling Prevalence Survey 2016 disclosed that in the past 6 years the proportion of people who participated in online gambling grew from 6.7% to 15.8%. Against this background and given the low rate of new betting office openings it is envisaged that the physical presence of this form of leisure service use will stagnate and possibly decrease. Existing units may revamp their premises to consolidate their business and heighten their appeal.

Gaming centres
The outlook for gaming centres is much the same as that for betting offices, though activity in recent years has seen a demand from operators to provide bigger premises with an increased number of Fixed Odds Betting Terminals (FOBTs). In previous years there has been an expression of interest to open a casino in Belfast. However, this could only take place with a change in the gambling legislation, namely the 1985 Betting, Gaming, Lotteries and Amusements (Northern Ireland) Order.

Gyms, leisure centres, swimming venues
Some capacity studies have attempted to forecast the requirement for additional gym space on the basis of participation rates and membership numbers. For example, the 2017 Retail and Leisure Study for Oxford City assessed capacity on the basis of a public participation rate of 28%, based on its survey findings, and an average membership of between 3,000 to 3,500 persons, with the higher membership figure associated with budget gym membership.

The Continuous Household Survey 2015/2016 by NISRA stated that 15% of people participated in "keeping fit" activities in NI, including going to the gym. Based on this public participation rate, together with the average size of membership cited above, there would appear to be a theoretical capacity to add up to 3 gyms to existing provision by 2035. This finding is based on the LDP population projection in this Study and is exclusive of gym facilities in hotels which are mainly used by guests. However, judging by the number of planning applications for gym use in Belfast City Centre, this technique for assessing capacity for further gym development would appear to underestimate future potential.

7.4 Conclusion

While it is possible to quantify the likely real growth in expenditure on leisure service uses up to 2035 (£209-£325m) it is less clear how this increase in spend will translate into development on the ground. Predicting future behavioural patterns is made difficult by fast moving changes in society and the vagaries of people's tastes and habits. Nonetheless, based on existing trends, a number of broad-brushed forecasts can be made. Eating out will continue to exert demand for restaurant/cafe and fast food floorspace given that it accounts for nearly two thirds of leisure service expenditure. Changes in drinking habits and an increase on online gambling will limit the development of pub and betting/gaming outlets respectively – a position reinforced by the requirement to satisfy a local needs test in licensing legislation. So too, the drive towards adopting a healthier lifestyle augurs well for development of keep-fit and personal health outlets. Finally, there may be capacity to open another multiplex cinema and some additional gyms in Belfast if its population grows as envisaged in the LDP.

SECTION 8: FUTURE OUTLOOK & EXPERIENCE ELSEWHERE

8.0 Introduction

This section of the Study considers the future outlook for retail and leisure uses and examines if there are any lessons to be learnt from similar studies elsewhere.

8.1 Outlook for the future

Impact of online shopping on retailing – Special forms of trading

Special Forms of Trading (SFT) refers mainly to the contribution of online and mail order shopping to retail expenditure. In theory the growth of online shopping would imply that the need for development of retail floorspace on the ground should decline at a corresponding rate. However, most retail analysts, including Oxford Economics, predict that the majority of retail sales in the foreseeable future will continue to be sourced from shops. This is due to the fact that most online shopping still involves deliveries or collection from existing retail stores as opposed to direct despatch from distribution warehouses. Having stated this, it must be acknowledged that the sourcing of goods directly from warehouses is likely to particularly increase for online comparison goods shopping.

By the year 2035 Experian estimates that online sales of comparison and convenience goods will both approximate around 20% of total sales. However, when allowance is made for the delivery of items from retail stores, as opposed to distribution warehouses, the aforementioned 20% figure falls to 5.3% for convenience goods. In contrast, some 16.5% of online sales for comparison goods will be sourced from locations other than shops.

Table 8.1

Proportion of shopping from online sales*		
	Convenience goods	Comparison goods
2017	3.2%	13.8%
2035	5.3%	16.5%

** Sales not sourced from shops*

Source: Appendix 3, Experian Retail Planner Briefing Note 14, November 2016

While it is acknowledged that internet shopping will impinge upon the comparison goods trade of the high street and district centres it is equally clear that a click and collect role and showroom function can still be performed by existing shops. For example, the Sainsbury superstore at Holywood Exchange is currently undergoing alterations to accommodate a click and collect point for Argos goods. In GB, Amazon has an agreement with the Co-operative to allow its shoppers to retrieve items from self-service lockers located within its stores.

Impact of digital innovation on leisure time

Technological advances are also affecting how people choose to spend their leisure time. For example, people can digitally stream entertainment on demand to their television and electronic devices, instead of visiting the cinema or theatre. Equally social media interactions are replacing the need for face-to-face encounters. These societal changes continue unabated and, as far as the high street is concerned, larger and better resourced businesses capable of investing in technology will prove the most resilient to these changes.

Modest real growth in projected retail expenditure

Experian notes that the recent growth in comparison goods sales between 2014 and 2016 was largely due to heavy discounting and continued deflation in the price of goods. However, Experian predicts that annual real growth in comparison goods expenditure (i.e. less that generated by population increase) will be more modest in the future and will average 3% up to 2035 (Table 8.2). This rate of real growth is markedly lower than the annual average growth rate of 5.6% recorded during the 1997-2015 period.

Table 8.2

Percentage Real change in expenditure 1997-2035		
Use category	**Actual 1997-2015**	**Projected 2016-2035**
Retail - Convenience	-1.0%	0.0%
Retail - Comparison	5.6%	3.0%
Leisure	-0.9%	1.3%
Source: Experian Retail Planner Briefing Note 14 (November 2016)		

As with the trend in previous years, Experian also forecasts zero real change in convenience goods expenditure up to 2035. In contrast to this stagnant state of affairs, Table 8.2 notes that there will be real growth in leisure spend of 1.3% per annum up to 2035.

Competition from Out of Centre shopping

The 2013 English Heritage Report entitled "The Changing face of the High Street: Decline and Revival" stated that, in 1993, only a fifth of retail investment was in out of centre shopping locations. At present, however, the value of out of centre shopping exceeds that in the town centre and is growing.

Free onsite car parking and the ability to develop larger, modern and more cost efficient stores in out of centre locations is fuelling this trend. Lidl's business model best exemplifies this, wherein they seek opportunities to develop large, freestanding utilitarian stores of circa 26,000 sqft. Likewise, Marks and Spencer's current roll out of its Simply Food stores in Northern Ireland is targeting out of town centre locations.

Added to the above, it is expected that high street retailers such as TK Maxx, Next and Boots will continue to actively pursue larger units in out of centre retail parks in order to showcase their wares. Indeed, TK Maxx is in the process of occupying the former JJB Sport units in Drumkeen Retail Park near Forestside.

Retailers are not alone in searching for out of centre sites. Food and beverage operators such as Greggs, Costa, Nando's and Starbucks continue to explore opportunities for outlets, including drive-thrus, in retail parks.

The blurring of the lines between bulky goods retailing and ordinary comparison goods shopping, together with the difficulty in enforcing related planning conditions, means that the attraction of developing out of centre sites will continue. Such activity stresses the importance of seeking to provide comparably sized units in the City Centre and of being explicit in distinguishing between different forms of retailing that are permissible in out of centre locations.

Retail formats - Convenience goods

In the past few years there has been an increasing trend to develop small format convenience stores (e.g. Tesco Express) as the appeal for weekly, bulk-buy purchases from superstores has begun to wane. This is due a combination of factors, including: a declining household size (i.e. rise in one person households); preference for eating out and ordering food in; rise in petrol prices; and competition from discount stores. Although more modestly sized superstore proposals will undoubtedly continue to seize prime out of centre opportunities where they arise, small format foodstores are especially set to increase in number.

Figures 8.1 (a) and (b): Tesco express on University Road and Royal Avenue

Retail formats - Comparison goods

In its 2016 National Retail Barometer report CBRE comments that future development in comparison goods retailing will have a city focus, with modernised and redeveloped prime pitches proving most attractive to new market entrants. Cities maintain their appeal because of their large catchment draw and because they are able to provide large units. Quoting the examples of Cardiff and Liverpool CBRE reveals that modern shopping in prime pitches has lower vacancy rates (circa 3% of floorspace in both cities). Cities are therefore considered a less risky investment proposition than towns, which bodes well for Belfast City.

In addition, it is anticipated that future shopping centre development in cities will be more modestly sized and will have a larger proportion of leisure uses to its composition.

8.2 Comparison with other cities

This subsection examines the approach to retail and leisure planning in similarly sized cities that have been the subject of up to date retail and leisure research. Examples of those studies consulted include:

- Sheffield and Rotherham Joint Retail and Leisure Study 2017
- Leicester City Council and Blaby District Council Town Centre and Retail Study 2015
- Nottingham City Council Retail Background Paper to Development Plan 2015
- City and County of Swansea Retail and Leisure Study 2015
- Oxford City Council Retail and Leisure Study 2017

A review of the above work raised a number of salient considerations which are considered below.

Retail profile of Belfast City Centre relative to similarly sized cities

Reference to Table 8.3 reveals that the amount of shops selling convenience and comparison goods in Belfast City Centre is generally lower than that for similarly sized cities. For example, 5% of units in Belfast City Centre sell convenience goods compared to 9.6% in Sheffield City Centre (2017 figures). Also, while the number of vacant units in Belfast City Centre is high at 21% it is not unlike those figures for the city centres of Sheffield (23.7%) and Swansea (21.2%).

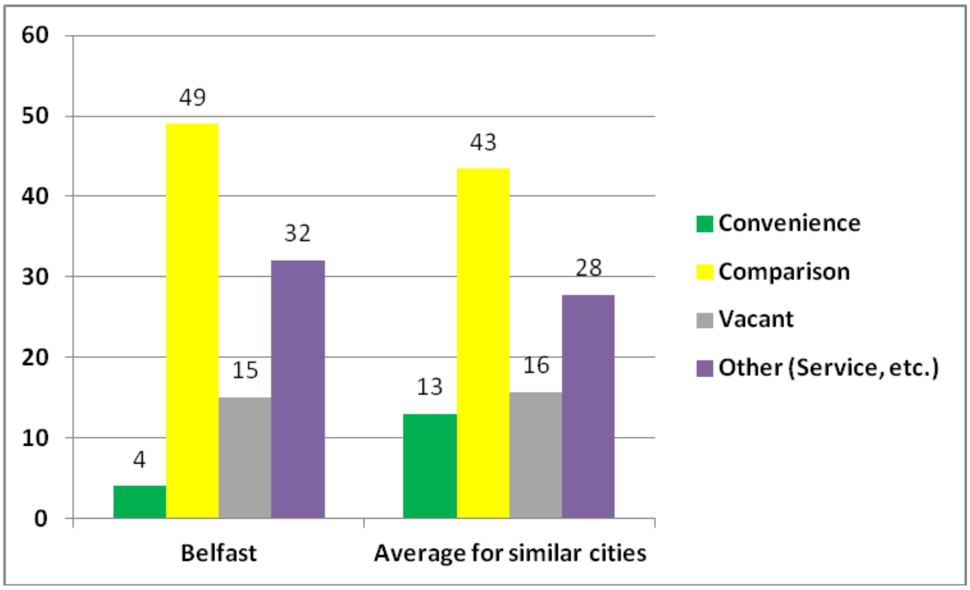
Table 8.3

	Retail profile of Belfast City Centre relative to city centres in similarly sized settlements				
	Percentage of units				
Use	**Belfast**	**Sheffield**	**Leicester**	**Nottingham**	**Swansea**
Convenience	5	9.6	7.3	9	6.1
Comparison	30	32.9	35.1	34	36.5
Vacant	21	23.7	13.2	18	21.2
Other (Services, etc.)	44	33.8	44.4	39	36.2
Total	**100**	**100**	**100**	**100**	**100**

Source: Recent retail/leisure studies for these cities 2015-2017

When the analysis is confined to floorspace within the aforementioned city centres Figure 8.2 reveals that the disparity in convenience goods provision is even more pronounced (4% in Belfast City Centre v 13% average in similarly sized cities). However, the amount of floorspace dedicated to comparison goods shopping in Belfast City Centre is higher than the average for the cities above (49% v 43%) while the proportion of vacant floorspace is similar (15% v 16%).

Figure 8.2: Percentage breakdown of floorspace in Belfast City Centre relative to average for similar cities



Rental levels

In general, population density levels in the shopper catchments of similarly sized cities in England are three times higher than that for Belfast. This means that these cities can depend upon greater available expenditure within their hinterlands from which to sustain the turnover of shops. As a consequence, rental levels tend to be higher in

Table 8.4

Location	**Zone A Rent (£ psf) in 2016**
Manchester	£280
Leeds	£250
Cardiff*	£225
Sheffield	£180
Belfast	£130
Swansea*	£110
**Data for 2014*	

England and this helps to explain why the average Zone A rental level in Belfast's prime shopping streets (£130 psf) is well below that of Manchester (£280 psf) and Leeds (£250 psf) – see Table 8.4.

The higher population density levels in GB undermine efforts for direct comparison with Belfast, for example footfall levels would expect to be higher in GB than in Belfast. This difficulty in attaining like for like comparative analysis means that it is necessary to distil the broader messages from retail and leisure planning in cities in GB in order to appraise their relevance for Belfast. These are considered below.

City Centre – Key messages for retail and leisure planning
While each city has its own unique challenges there are essentially three core themes that underpin the approach to retail and leisure planning in these locations.

- Firstly, it is recognised that the joint promotion of retail and leisure use development comprises only one strand of a multifaceted approach to planning for the City Centre. As far as Belfast is concerned the other main strands relate to office, tourism, educational and residential development in the City Centre.
- Secondly, planning for retail and leisure development is allied to environmental improvements, public realm enhancements and improved management of the area.
- Thirdly, the maintenance of a safe, clean environment generates a feel-good factor and encourages people to shop.

In addition to the above, a number of specific points of relevance to the Study were noted. These include:

- Definition of the retail hierarchy should be consistent with regional policy wording.
- Any projected significant increase in retail and leisure floorspace should be directed to the City Centre.
- There is a need to safeguard the Primary Retail Frontage (PRF) as a focus for City Centre retail development, with the minimum proportion of units retained for retail use ranging from 50% to 70%.
- New retail development in the City Centre should integrate with the PRF.
- Floorspace thresholds/restrictions should be considered for edge of centre and out of centre locations.
- No standard technique exists to estimate future floorspace requirements for leisure service uses.

District Centres - Key messages for retail and leisure planning
A number of relevant messages for District Centres can equally be distilled from experience elsewhere. These include the following:

- Emphasis is placed on retaining expenditure on convenience goods within the District Centre catchment. District Centres principally rely on strengthening their convenience goods role as a means of bolstering their trading fortunes in general.
- Operators that specialise in the sale of low cost goods in District Centres are the most resilient to competition.
- It is not unusual for the majority of comparison goods expenditure in District Centre catchments to seep to larger centres elsewhere.
- District Centres benefit from the promotion of their local distinctiveness and identity.

8.3 Conclusion

In some respects the above outlook could be considered little more than a snapshot of an ever changing reality given the dynamic nature of retailing. However, there does seem to be a consensus that, for the foreseeable future, the majority of retail sales will continue take place from shops. Accordingly, there is a requirement to plan for its future development, particularly within the context of other uses, notably leisure service uses. This is the subject of the final section of this Study.

SECTION 9: CONCLUSION AND RECOMMENDATIONS

9.0 Introduction

The final section of this Study summarises its key findings and suggests recommendations for the planning of retail and leisure service use in Belfast. This includes strategic and operational advice relating to the scale, nature and location of this development in the foreseeable future.

9.1 Key findings

The principal findings of the research and analysis underpinning this assessment are outlined under the following headings:

- Health check of existing centres
- Survey of existing shopping patterns
- Future outlook and experience elsewhere
- Retail and leisure capacity assessment

In addition to the above this section of the Study will consider the employment potential associated with the capacity findings.

Each of these is summarised below.

9.11 Health check of existing centres
Health checks of the City Centre and District Centres yielded the following main findings:

- As a retail destination Belfast currently ranks 18th in the UK Retail Rankings according to Venuescore. It previously ranked 14^{th} when Victoria Square opened in 2008.

- According to GOAD the primary retail area in the City Centre has a vacancy rate higher than the GB average, with 18% of units vacant in 2016 compared to 11% in GB. By and large, this level of vacancy has not changed since 2009.

- The proportion of comparison goods shops in the primary retail area has fallen by 7% between 2009 and 2016. In contrast the proportion of leisure service uses has increased by 5%.

- The presence of multiples in the City Centre is increasing (55% of comparison goods units in 2016 compared to 51% in 2009). Having stated this, the 2015 Retail Positioning Paper by Deloitte maintained that Belfast was under-represented in respect of prestigious retail chains (e.g. Harvey Nichols, FCUK, John Lewis, Brown Thomas) compared to other major cities.

- Rental levels on the prime pitches in Belfast are stabilising in line with the trend in GB, while commercial yields on investment in parts of these pitches are exceeding those in several comparably sized cities (Manchester, Liverpool and Leeds).

- Health checks for the 7 District Centres in Belfast designated under BMAP indicate that 3 are performing well (Kennedy Centre, Cityside, Westwood Centre), 2 have lost their main food anchor tenant (Connswater and Park Centre), 1 is performing poorly (Dairy Farm) and 1 is effectively non-operational (Hillview).

9.12 Survey of existing shopping patterns
A telephone survey of over 500 household shoppers throughout the Belfast Council area was undertaken in July 2017 as part of this Retail and Leisure Study. It was carried out in order to obtain a robust evidence-based understanding of shopping and leisure patterns in Belfast so that the Council can better plan for these activities. The main results of the survey are summarised below.

- Tesco enjoys the largest market share of grocery shopping in Belfast. Its share (43%) exceeds the combined market share of ASDA, Sainsburys and M&S. The location of the largest foodstores operated by Tesco, Sainsbury's and ASDA in Belfast is illustrated in Map 9.1 enclosed at the end of this section.

- Belfast City Centre is still the most popular destination for comparison goods shopping, with 60% of respondents confirming this. Significantly, online shopping is next highest (11%), followed by Forestside (10.4%), Abbeycentre (5.7%) and Boucher Retail Park (5.1%).

- Boucher Road is the principal location for bulky goods shopping by the residents of Belfast (22.8%). It is twice as popular as Holywood Exchange (11.2%).

- When shopping for comparison goods roughly half of shoppers (50.2%) also go for something to eat or drink.

- Most people (69%) stated that they were satisfied/very satisfied with shopping facilities in Belfast City Centre.

- When asked how the attractiveness of the City Centre could be improved to encourage visits, lower parking costs (21.4%) and more shops (12%) featured prominently.

9.13 Future outlook and comparison with other cities
Research into the prospects for retailing in the future revealed the following findings:

- Experian estimate that there will be no real growth in expenditure (i.e. less that generated by population increase) on convenience goods up to 2035. Added to this, projected real growth in expenditure on comparison goods will be considerably lower (3% p.a.) than that experienced during the 1997-2015 period (5.6% p.a.).

- By the year 2035 online transactions will account for around 20% of total retail sales. However, three quarters of online sales of convenience goods will still be sourced from shops. In contrast, three quarters of online sales of comparison goods will not be sourced from shops.

- Retail chains will continue to pursue development options in out of centre locations. Food and beverage eateries will do likewise.

- Notwithstanding the above challenges posed by online and out of centre shopping, research by CBRE states that, in terms of retailing, cities are considered a less risky investment proposition than towns, which bodes well for Belfast.

9.14 Retail and leisure capacity assessment
In the interest of sensitivity testing and incorporating flexibility into the assessment, the capacity for additional retail and leisure development is estimated on the basis of population projections in the Local Development Plan (LDP) and on the basis of low population forecasts by NISRA. Accordingly, the capacity range for additional retail floorspace in Belfast can be outlined as follows:

- Between 2017 and 2035 available expenditure on convenience goods is estimated to grow to between £9m and £104m. Reference to Table 9.1 indicates that this equates to a floorspace requirement of between 1,348 net sqm and 11,887 net sqm. Based on existing store sizes the latter figure can be interpreted as capacity for up to 6 food superstores or 12 discount foodstores.

- Growth in available expenditure on comparison goods, including bulky durables, during the same period is estimated to be more substantial and to be in the region of £714m to £942m. This translates into a floorspace capacity for between 63,519 net sqm and 98,336 net sqm. Ideally, part of this capacity should be absorbed by the occupation of vacant units in Belfast City Centre, which according to GOAD amounted to 29,000 net sqm in 2016.

Table 9.1

Capacity for additional retail floorspace in Belfast 2017-2035		
	Capacity (Net sqm)	
	Low forecast	**LDP forecast**
Convenience goods	1,348	11,887
Comparison goods	63,519	98,336
Total	**64,867**	**110,223**

- In terms of projected growth in available expenditure on leisure service uses this is estimated to exceed that figure for convenience goods and to range between £209m and £325m between 2017 and 2035. Based on existing spending patterns nearly two thirds of this expenditure growth will specifically fuel demand for additional restaurant, cafe and takeaway space.

9.15 Retail employment potential

The development of new retail space will confer direct economic benefits vis-à-vis increased rates and employment.

Employment and density guidance from the Home and Communities Agency, dated 2015, estimates that a full time equivalent (FTE) retail post is created for every 15-20 sqm of net retail area. Based on the midpoint value of this ratio (17.5 net sqm) in the region of 3,700-6,300 retail jobs could be created by the additional convenience goods and comparison goods floorspace estimated for Belfast up to 2035.

This job creation figure is a very rough estimate and subject to considerable refinement. For instance, retail warehouses have a lower employment density of 1 worker per 90 sqm of net retail floorspace. Furthermore, the experience of this firm has demonstrated that the number of employees in discount stores can be two thirds lower than staff levels in a typical superstore. Given the increasing market share of discount retailers and the preference for large retail units the upper end of this jobs forecast is perhaps optimistic.

Interestingly, research by Ulster University's Economic Policy Centre suggests that the additional numbers employed in A1 retailing in Belfast, which includes retail services as well as those employed in convenience and comparison goods shops, will range between 3,000 and 5,300 by 2035.

9.2 Key recommendations of Study

Based on the interrelated output of the health checks, household shopper survey, comparative analysis and floorspace capacity assessment, a number of recommendations can be distilled for the planning of retail and leisure use in Belfast. These are subsumed under the following headings:

- Retail hierarchy and designation boundaries
- Location, nature and phasing of future retailing & leisure service uses
- Belfast Retail & Leisure Strategy
- Retail Policies

9.21 Retail hierarchy and designation boundaries

It is necessary to reflect upon the status and role of centres in Belfast in order to evaluate the merits of designations within the retail hierarchy.

City Centre

Clearly, the commercial primacy and regional importance of Belfast City Centre dictates that it should continue to be promoted and protected as the first choice location for major retail and leisure development. This is consistent with the "town centre first" approach of the Strategic Planning Policy Statement (SPPS) and its regional primacy under the Regional Development Strategy.

Accordingly, the extent of the City Centre boundary should remain in place in order to facilitate retail and leisure development opportunities linked to population growth.

Retail Core

The purpose of designating a Retail Core is essentially twofold:

- To create a critical mass of shopping that is capable of exerting a huge catchment draw for the regional capital.
- To encompass areas which afford opportunities for retail-led regeneration.

The current Primary Retail Core largely encapsulates the busiest shopping streets and adjacent areas earmarked for regeneration. Its enlargement is not recommended for the following interrelated reasons:

- Care must be taken to preserve the policy attractiveness of parts of the Retail Core, especially the NE Quarter, for retail investment. Some 17% of the units in the Retail Core are vacant. Significant regeneration work by the Department for Social Development and others as taken place here and a sizeable extension of the Core could undermine this work.

- A survey of the Retail Core indicated that retail uses (convenience, comparison and retail service) accounted for 58% of the units (excluding vacancies) with non-retail uses accounting for 42%. When it is considered that retail uses (excluding vacancies) are in the minority in the City Centre as a whole (45%) a major extension to the Retail Core could result in the predomination of non-retail uses, which would undermine the very rationale for its designation.

Primary Retail Frontage

The purpose of identifying a Primary Retail Frontage is:

- To concentrate retailing so that the proximity of outlets enables retailers to benefit from shared shopping trips.

- To protect the prime pitches from inappropriate uses which are not normally associated with generating healthy footfall levels or providing an active street frontage. In respect of the latter consideration, some businesses such as gaming centres and betting offices have inward looking facades linked to the need to comply with licensing restrictions on advertising gambling.

The Primary Retail Frontage (PRF) in Belfast should remain in place but the percentage unit threshold for retail uses should be reduced to 60% from its current 75%. This would better reflect the current composition of uses on the PRF and the increasing role performed by leisure service uses within the City Centre.

In terms of the coverage of the PRF consideration could be given to its extension along Ann Street, given its linkage to Victoria Square. In addition, there are grounds to recommend its removal from Donegall Square North given the preponderance of bank use on one side and non-active frontages on the other. The proposed PRF and the ground-floor land use profile of the City Centre is illustrated in Map 9.2 enclosed at the end of this section.

District Centres

The rationale behind District Centre designation is to provide a critical mass of locally based retail and service uses beyond the city centre. Their designation is especially important in facilitating the provision of a sizeable element of comparison goods shopping for local communities outside the city centre.

Due largely to the scale of retail development existing and permitted on these lands the designation of the 7 District Centres should be retained. While the continued designation of Hillview Retail Park is open to debate, given its inability to secure a long term food anchor, recent commercial proposals for the site might help stimulate renewed interest here.

The development of a District Centre in North Belfast has long been an established aim of retail planning in Belfast since the preparation of the Belfast Urban Area Plan 2001. The development of the Hillview Retail Park was viewed as a means by which to secure District Centre provision in this part of Belfast. Unfortunately, however, initial occupation by Dunnes stores failed to trigger subsequent occupation of remaining units. Dunnes succession by ASDA did not materialise due, apparently, to the inability of the chain to secure a license to sell alcohol.

While issues pertain to the viability of certain other District Centres, namely Dairy Farm and Park Centre, it is recommended that their designations remain. In so doing, it might encourage efforts to redevelop and modernise – as happened at the Westwood Centre District Centre.

The boundary of the Connswater District Centre should be extended to include the largest food retailer on site, namely Lidl (see Map 9.3 at the end of this section). Although separated from the mall it has effectively become the new food anchor store for this District Centre since Tesco relocated to its new superstore on the Castlereagh Road.

Local centres
Under draft BMAP there are 2 designated local centres at Kingsway (Dunmurry) and Kings Square (Dundonald). Added to these there are many undesignated local centres located on the main roads in Belfast, most of which are zoned in draft BMAP as shopping/commercial areas and nodes on 18 arterial routes.

As with District Centres the purpose of their designation is largely premised on the following interrelated grounds:

- To create a focal point for the accommodation of retail uses and services for local needs, in preference to their piecemeal and sprawled development;
- To protect against the loss of retail and service floorspace to residential development; and
- To highlight the importance of retaining local facilities when considering the retail impact of competing proposals.

Local shops
These refer to individual premises or groups of units located on non-arterial roads within mainly residential areas. Again, it is not necessary to prescribe a designation for each grouping of units.

9.22 Location, nature and phasing of future retailing & leisure service uses

Taking on board the results of the capacity assessment the following broad guidance can be submitted on the location, nature and phasing of future development. This is outlined for (i) Convenience goods retailing (ii) Comparison goods retailing and (iii) the leisure services sector.

(i) Convenience goods retailing
Planning policy has long recognised that, in the interest of encouraging sustainable travel patterns, convenience goods shops should ideally be located close to where people live. Mindful of the hierarchy of centres in Belfast this would imply that large foodstores should be primarily concentrated in District Centres.

Furthermore, based on the existing distribution of District Centres across the City it is clear that there still remains capacity to develop one in North Belfast. Facilitating the growth of grocery provision in this part of Belfast would equally help to regenerate one of the most economically deprived parts of Northern Ireland.

Added to the above, opportunities for convenience goods shopping are likely to increasingly emerge in Belfast City Centre, where facilitation of the convenience shopping needs of workers, shoppers, students and tourists, will be augmented by the accommodation of an increased residential population. Given the trend in recent years for convenience goods shopping to involve a greater frequency of trips as opposed to standard weekly purchases this additional floorspace may increasingly be accommodated in smaller store formats, as exemplified by Tesco Express.

(ii) Comparison goods retailing

In line with regional policy the Retail Core of Belfast City Centre should be the preferred location for additional comparison goods floorspace. The pressing need to rejuvenate parts of the Retail Core and to counter the competition presented by out of centre developments both within and beyond the council boundary mean that the facilitation of modern comparison goods floorspace in the centre of Belfast should be a priority. In so doing, it would strengthen the critical mass of shopping available in Belfast.

Beyond the Retail Core the appropriateness of developing new comparison goods floorspace should be assessed on the basis of sequential test criteria relating to the suitability, availability and viability of land and property.

Outside of the City Centre, District Centre designation allows for a degree of locally accessible comparison good shopping in the neighbourhoods.

While the assessment of future convenience goods floorspace can demonstrate a capacity for further foodstore provision it is less clear what specific shop types can be foreseen for comparison goods shopping. The translation of comparison goods floorspace figures into unit numbers is subject to the vagaries of end-user requirements. For example, furniture and carpet retailers require larger operating space than a gift shop. In its 2015 Retail Positioning Paper for Belfast, Deloitte (Javelin) pointed to the future accommodation of large units for high profile entrants in Belfast, which ideally could be housed in a John Lewis anchored Department store development within the City Centre.

It is also important to note that the projected capacity for comparison goods floorspace is inclusive of bulky goods floorspace, which typically applies to larger units. The purchase of bulky items accounts for approximately a quarter of all comparison goods expenditure. Bulky goods retailers require bigger operational and showroom space for the large ticket items they sell. They usually trade from retail warehouses. Their floorspace requirements therefore highlight the appropriateness of providing a range of floorspace capacity in this retail and leisure study.

Phasing of retail development

It is recommended that the amount of additional convenience and comparison goods floorspace permitted from 2017 be monitored against the low floorspace capacity figure identified in this Study. When this capacity is reached a review of retail floorspace need is recommended in the light of up to date population figures.

(iii) Leisure services sector

One of the regional strategic objectives for town centres and retailing is to secure a town centres first approach for the location of future retailing and <u>other main town centre uses</u> (Paragraph 6.271, SPPS). The SPPS further states that other main town centre uses include "*cultural and community facilities, retail, leisure, entertainment and business*".

As outlined previously in Section 4 the definition of leisure service uses adopted for this Study followed standard classifications used in other studies and by research bodies, notably Experian. The term "leisure service use" relates to much more than just recreation and encompasses a range of other uses associated with eating out, socialising with a drink, entertainment and partaking in a game of chance.

However, unlike the capacity assessment carried out for retailing, it is more difficult to be definitive on providing advice on the scale, nature, location and phasing of leisure service uses. This is especially so given the disparate range of uses to be considered. Viewed in this context, it can be concluded, as per the requirement of the SPPS, that major leisure service development (i.e. 5,000 gross sqm or more) should be directed to the City Centre in the first instance.

Indeed, the scope for major leisure development would appear to be linked to large mixed use projects earmarked for Belfast City Centre. Proposed leisure use features in major proposals for a number of key development opportunity sites in Belfast City Centre. These include the NE Quarter (3,000 sqm of café/restaurant space), Belfast Telegraph site (8,000 sqm leisure space), Queen's Quay (8,000 sqm of leisure space including food and beverage provision along waterfront), former Sirrocco works (restaurant, café and local retail) and land to the front of the Odyssey SSE Arena (1,303 sqm leisure space).

Despite the difficulty involved in detailing the capacity for future leisure service uses, a brief comment below is made on the location of the main leisure service uses considered in this Study.

Restaurants/cafes and takeaways

Accounting for nearly two thirds of expenditure on leisure service uses it is an activity closely associated with shopping trips (over half of shoppers surveyed said they also frequented a restaurant or cafe). It is therefore an integral part of the shopping experience and the opening of eateries should be facilitated in the Retail Core, Primary Retail Frontage where appropriate, and in District Centres.

Figure 9.1: Restaurant use on the Primary Retail Frontage
(Patisserie Valerie, Castle Lane)

GOAD data for the period 2009-2016 indicates that the number of fast food takeaways in the primary retail area of Belfast has actually decreased, which is to be welcomed. However, they are very much a part of the commercial profile of arterial routes (circa 8% of all businesses) and their proliferation is giving rise to concerns for the accentuation of obesity levels. In its 2015 Development Plan the city of Nottingham chose to restrict hot-food openings outside established centres and within 400m of schools. However, it is unclear how effective such a policy would work in practice when it is considered that hot-food deli stands, which sell fried foodstuffs, are also very much part of the offer of convenience stores.

Gyms/fitness suites

Recent trends in GB have demonstrated that town centres prove equally attractive for gym operators as out of centre locations. This is corroborated by the number of planning applications submitted for a change of use from retail to gym use in the City Centre in recent years. They are also capable of functioning above groundfloor level outside of standard retail opening hours, which is of benefit to the City Centre, in terms of making use of upper storey levels and promoting the evening economy.

Figure 9.2: Upper storey leisure use in the City Centre
(Pure Gym at St Annes Piazza)

Cinemas
Compared to other locations in GB Belfast is well provided for in terms of cinemas. Nonetheless, if the population of Belfast increases in line with projections in the LDP, there would appear to be potential to introduce another multiplex cinema in the City Centre or possibly in a District Centre which currently lacks one.

Betting offices and gaming centres
While their growth, if any, is predicted to be minimal given the popularity of online gambling and their regulation by licensing legislation, new development of this type should be directed away from the Primary Retail Frontage in the light of their low trip generating appeal.

Public houses/bars/clubs
Socialising with a drink featured prominently in the survey of households for this Study and is a key driver of visits to the City Centre in the evening. Licensed premises selling alcohol are therefore important components of the City Centre economy and should be facilitated in the City Centre and Retail Core. As noted earlier, Wetherspoons have obtained planning permission to open a public house in the former JJB Sports unit on the Royal Avenue Primary Retail frontage (Figure 9.3). It is recommended that any further openings on the Primary Retail Frontage

Figure 9.3: Former JJB Sports outlet on Primary Retail Frontage
approved for Wetherspoons pub

should occur only in cases where a non-retail use exists on each side of the proposed premises, so as not to break up a continuous shopping frontage.

Theatres and concert halls

As stated previously in Section 7.0 of this Study, the relatively recent development of the MAC Theatre and extension to the Waterfront Hall may well have addressed demand for these facilities for the duration of the LDP. Any further opportunities for development may be linked to mixed use proposals for waterside locations in the City Centre.

Figure 9.4: Waterfront Hall recently extended

Outside of the City Centre, footloose theatre and concert events will continue to be held in property and grounds when required.

Hairdressing/beauty salons

According to the 2015 Use Classes Order they are technically considered A1 shops and, as a retail service use, are entitled to open on the Primary Retail Frontage.

9.23 Belfast Retail and Leisure Services Strategy

Taking into account all the foregoing considerations the retail and leisure services strategy and policies for Belfast City Council are outlined below.

The Retail and Leisure Strategy for Belfast is essentially one of promotion and protection. It consists of the following:

- Promote Belfast City Centre as the leading shopping and leisure services destination in Northern Ireland.
- Manage the location, scale and nature of retail and leisure service development in order to protect the vitality and viability of the City Centre.
- Outside of the City Centre, focus retail and leisure service development within designated District Centres and Local Centres, where people have access to a choice of transport modes and where the proximity of businesses enables opportunities for commercial synergy and multipurpose trips by consumers.

9.24 Belfast Retail Policies

In the main, policies connected with the retail and leisure strategy relate directly to retailing, with indirect reference to leisure service uses. They build upon earlier policies stated in draft BMAP and are outlined below.

Policy BR 1 – Belfast City Centre & Retail Core

Planning permission will be granted for retail and leisure services development in the City Centre.

The Primary Retail Core will be the preferred location for major new retail development (i.e. 1,000 gross external sqm or more). Outside of the designated Primary Retail Core, planning permission will only be granted for major retail development in the City Centre where it can be demonstrated that there is no alternative site within the Primary Retail Core.

Justification and clarification

This retail policy is required to safeguard against inappropriately sized retail proposals outside the Retail Core. The above policy is justified on the basis of regional guidance in the SPPS, which adopts a town centre first approach and applies a sequential test to the evaluation of retail proposals for main town centre uses from the retail core outwards. The size threshold of 1,000 gross external sqm for major retail proposals is based on paragraph 6.283 of the SPPS.

Policy BR 2 – Primary Retail Frontage

Non-retail development will be restricted in designated Primary Retail Frontages so that no more than 40% of the frontage of the shopping street to which it relates is in non-retail use or no more than three adjacent units are in non-retail use.

Justification and clarification

Most cities recognise the importance of the Primary Retail Frontage in maintaining retail levels in the Retail Core. The 40% threshold for non-retail development is considered reasonable when it is remembered that retailing currently accounts for 61% of uses (excluding vacancies) on most streets that form part of the existing Primary Retail Frontage (PRF). Vacancies comprise 15% of units on the PRF.

Under this policy the following definitions apply:

- Retail uses include Class A1 shops (i.e. outlets that sell convenience goods, comparison goods or provide a retail service).
- Non-retail development includes financial and business services and leisure services. However, in respect of this policy, the 40% non-retail threshold excludes proposals for restaurant and cafe use.

The opening of a pub/bar on the Primary Retail Frontage shall be considered only in circumstances where a non-retail use exists on each side of the proposed premises, so as not to break up a continuous shopping frontage.

The frontage of a shopping street applies to the building length of that side of the street in question and extends along the distance of the street that bears its name. For measurement purposes the distance excludes gaps between buildings e.g. other streets, service lanes.

Policy BR 3 – District Centres, Local Centres and Local Shops

Planning permission will not be granted for retail development where it would likely result in a significant adverse impact on the distinctive role of Belfast City Centre as the leading regional shopping centre.

Beyond the City Centre a "**District Centre** first approach" will apply to proposals for major retail development (i.e. 1,000 gross external sqm or more).

Within **Local Centres** planning permission will be granted for retail development proposals provided that any individual unit created (including by extension) does not exceed 500 gross external sqm of convenience goods shopping or 200 gross external sqm of comparison goods shopping.

Retail development proposals in Local Centres in excess of these thresholds will only be considered in exceptional circumstances where a clear quantitative need is identified and where it is demonstrated that the proposal will not have a significant adverse effect on the vitality and viability of existing centres.

Local shops that are not designated as part of Local Centres will be limited to performing a local convenience and retail service role. In this regard, proposals for the sale of comparison goods will not be permitted even if they are below 200 gross external sqm in size.

Justification and clarification

In keeping with regional guidance in the SPPS (para 6.281) the Council seeks to facilitate shopping provision outside the City Centre in locations that are adequately served by public transport and which are within reasonable walking distance from residential areas. These locations are designated District Centres and Local Centres situated on major transport routes. This approach is consistent with the considerable investment being made on upgrading public transport links on major routes via the Bus Rapid Transit scheme. So too, it resonates with other Council initiatives that are aimed at promoting the vitality of businesses on major roads, such as the "Renewing the Routes" programme.

Policy BR 4 – Retail warehousing

Within areas of retail warehousing, including Boucher Road and Holywood Exchange, planning permission will only be granted for further retail development (except where extant permissions exist) where:

- The primary use of the proposed unit (70% or more) is for the sale of bulky comparison goods; and

- The proposal will not have a significant adverse impact on the City Centre, District Centres and Local Centres.

Planning permission may be granted for a limited amount of convenience goods shopping to meet a demonstrable local quantitative need. In such cases, the floorspace allocated to convenience goods in a proposed unit shall not exceed 300 net sqm.

No subdivision of bulky comparison goods floorspace will be permitted if it creates a separate unit of less than 700 gross sqm (excluding mezzanine space).

Justification and clarification

Retail parks, particularly Boucher Road and Holywood Exchange, contain the largest concentration of retailing in Belfast outside of the City Centre. While these locations afford opportunities for retail warehouse development, shopping in parts of Boucher Road has assumed a High Street comparison goods profile in terms of the retailers located there.

The area of Boucher Road extends from Broadway roundabout to Stockman's Lane and is encompassed by the Westlink and the Lisburn Road. Holywood Exchange is located on the extreme northeastern edge of the Council boundary. Their relative isolation from the City Centre and other commercial areas means that there is little scope for business synergy and shared shopping and leisure trips with established centres. Compared to the City Centre and other major routes the areas are also poorly served by public transport and are not within a reasonable walking distance from residential areas. As a consequence they are essentially car borne destinations and liable to periods of traffic congestion. These attributes mean that there is a requirement to manage further retail development in these areas via the Local Development Plan. This policy approach is supported by the contents of the SPPS. In paragraph 6.281 it states that, under the sequential test, only out of centre locations that are "accessible by a choice of good public transport modes" will be considered for main town centre uses.

The convenience goods size threshold of 300 net sqm in this policy is based on thresholds adopted in other studies in the UK. It specifically relates to the net floor area and is intended to manage the size of convenience stores, should a demonstrable local quantitative need be identified, and also to manage the proportion of convenience goods floorspace in units within retail parks that sell a mix of goods.

The minimum unit size of 700 gross sqm for a retail unit selling bulky comparison goods is based on the minimum unit size observed for recent retail park proposals and also on the recommended minimum size stated in the 2012 Retail Planning Guidelines in the Republic of Ireland.

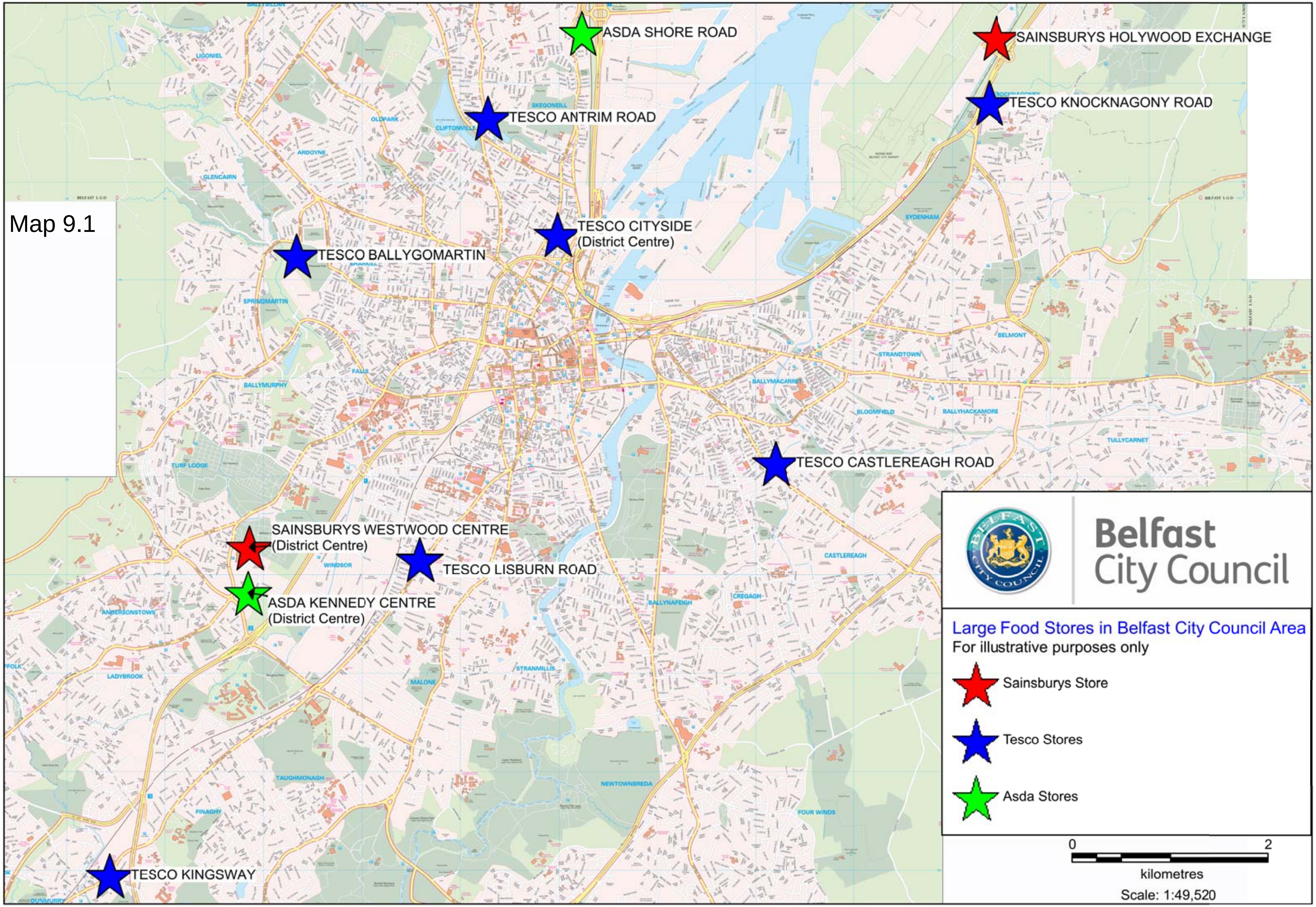
9.3 Conclusion

The results of the assessment indicate an appreciable capacity for further development in the retail and leisure service sectors for the period of the LDP (2020-2035). While the need for new grocery store provision is heavily linked to the projected increase in population the capacity assessment indicates that projected real growth in expenditure on comparison goods and leisure services will also significantly fuel development in these sectors.

Ideally, the capacity to add to the retail stock should be targeted at attracting retailers not currently trading in the City so that the range and choice of shopping available to consumers can be enhanced. In so doing, it would bolster the profile of Belfast as a "major city" shopping destination.

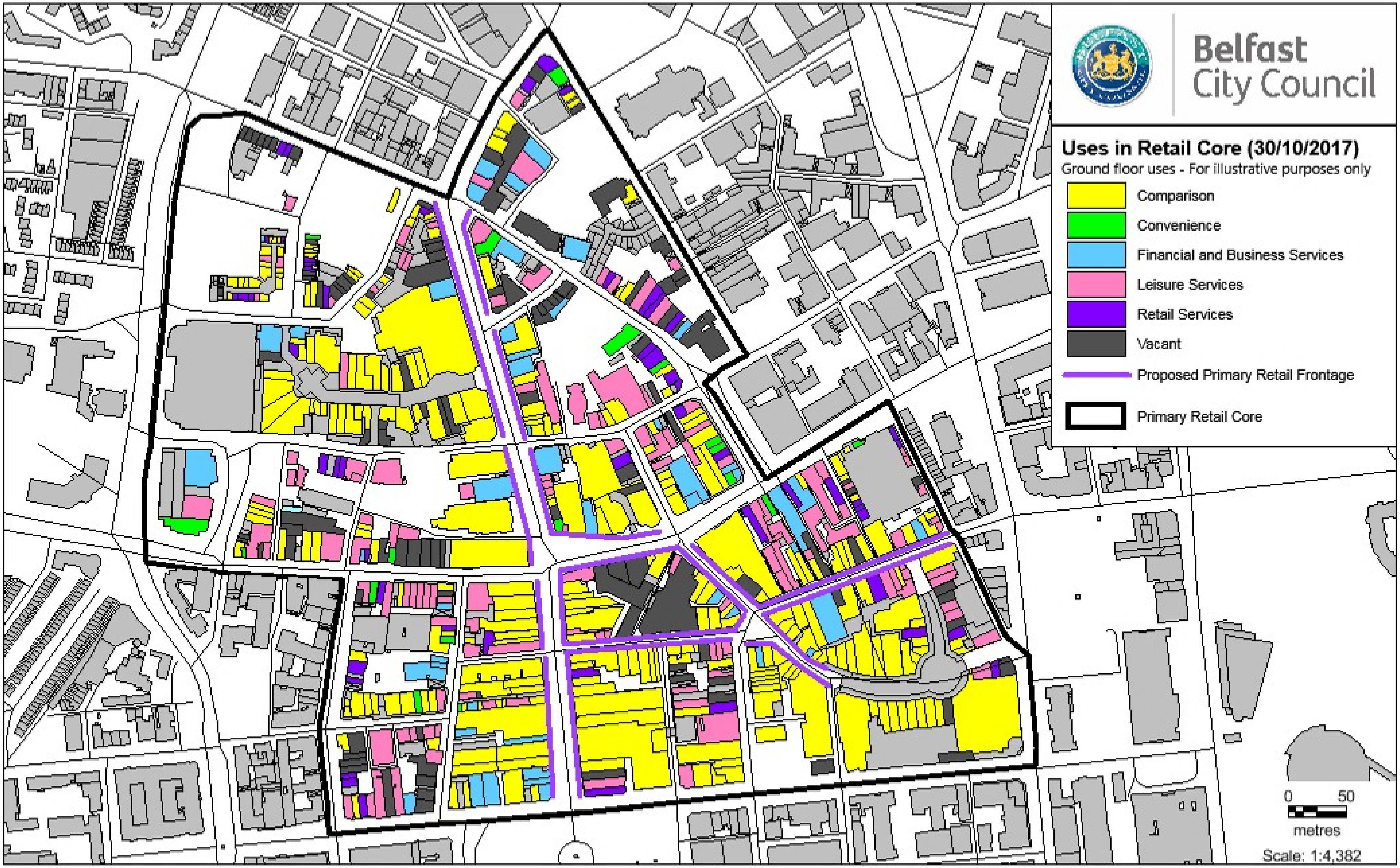
Ultimately, it is recognised that economic conditions and market interest will largely determine how much retail and leisure floorspace will be built in Belfast in the coming years. This notwithstanding, this Capacity Study is intended to assist the Council in planning for such development.

Map 9.1

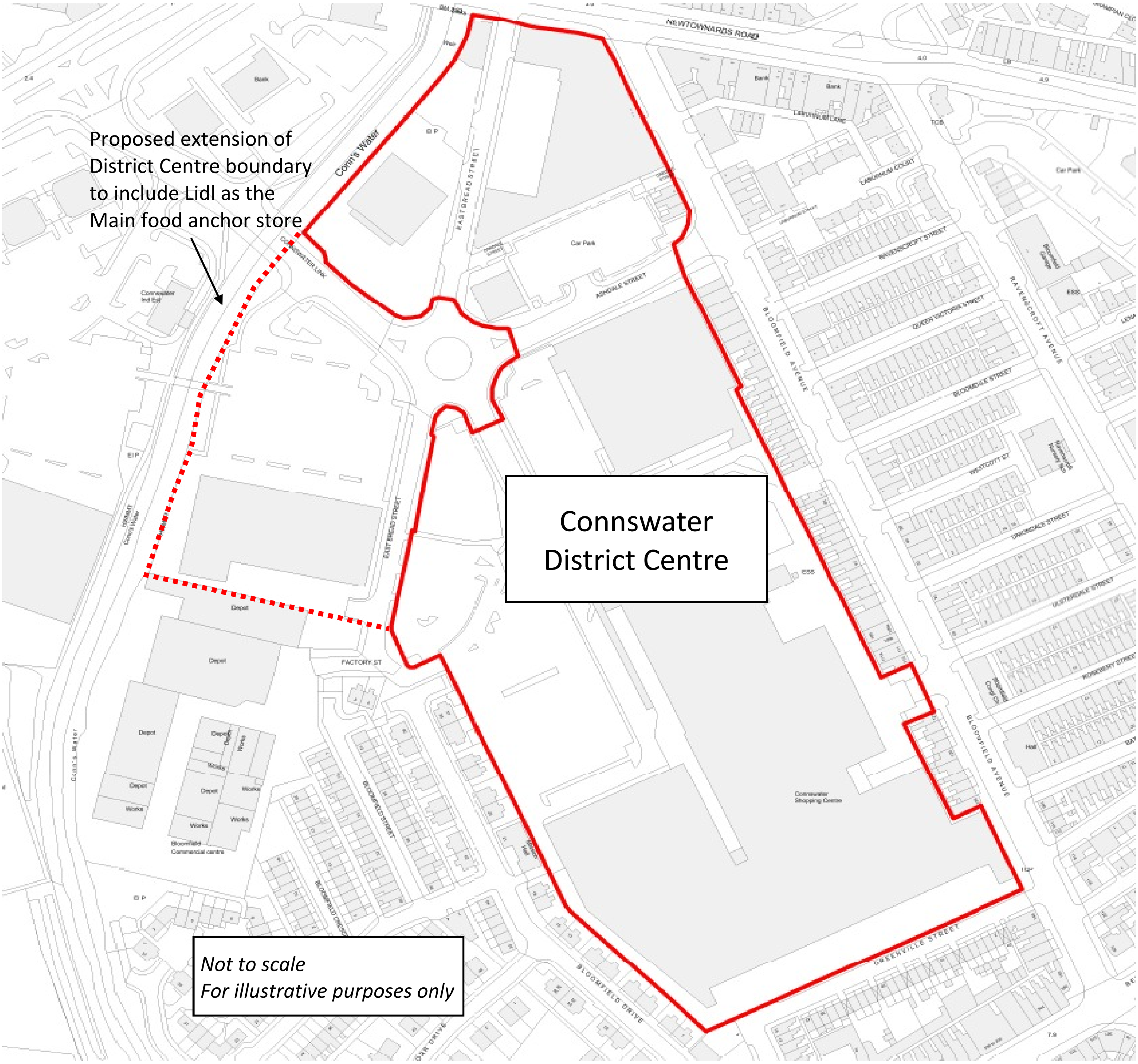

ASDA SHORE ROAD
SAINSBURYS HOLYWOOD EXCHANGE
TESCO KNOCKNAGONY ROAD
TESCO ANTRIM ROAD
TESCO CITYSIDE
(District Centre)
TESCO BALLYGOMARTIN
TESCO CASTLEREAGH ROAD
SAINSBURYS WESTWOOD CENTRE
(District Centre)
TESCO LISBURN ROAD
ASDA KENNEDY CENTRE
(District Centre)
TESCO KINGSWAY
Belfast
City Council
Large Food Stores in Belfast City Council Area
For illustrative purposes only
Sainsburys Store
Tesco Stores
Asda Stores
0
2
kilometres
Scale: 1:49,520

Map 9.2

DPS029



MAP 9.3: Proposed boundary extension of Connswater District Centre



Appendices

1.0 Glossary of terms

2.0 Copy of questionnaire

3.0 Summary of Household Survey findings

Appendix 1

Glossary of terms

Appendix 1: Glossary of terms

Convenience goods - mainly groceries and other consumable commodities that are purchased regularly and usually locally. They include food, drink (including take home alcohol), tobacco, newspapers, magazines, cleaning materials and toiletries.

Comparison goods - durable items for which customers are prepared to travel some distance in order to compare prices and quality. They include clothes, footwear, household durables, textiles, fashion accessories, toys, hardware and leisure goods.

Comparison goods (bulky) - is a subset of comparison goods retailing. It refers to large items such as furniture, carpets, electrical/white goods and DIY goods. Due to their bulky nature retailers of these products typically require large unit footprints for the sale and display of these goods, as well as adjacent parking provision.

District Centre – Large grouping of shops separate from and subordinate to the town centre. They are generally located on routes that are convenient and easily accessible to the local community by all modes of travel. They usually contain at least one food supermarket or superstore, a degree of comparison goods shopping, retail services (e.g. opticians, hairdressers), leisure services (e.g. cinema, bingo) and business services (e.g. bank).

Edge-of-centre - for shopping purposes, a location within easy walking distance (i.e. 300 metres) from the City Centre boundary.

Gross retail area – this is the total retail floorspace, as measured from inside the retail unit and includes sales space, storage space and ancillary space, including offices, toilets, canteen and circulation space.

Local centre – Location typically comprising a general grocery store, a sub-post office (commonly within the grocery store), hairdressing/beauty salon, cafe, hotfood takeaway, pharmacy and other small shops of a local nature. The primary purpose of a local centre is the provision of conveniently accessible shopping and services for local communities. They are commonly found on arterial routes and on other main roads.

Local shops – these refer to individual retail outlets or small groupings of local businesses that are generally located on roads and in residential areas that connect with arterial routes.

Leisure services - largely refers to the following uses: restaurant/cafe/fast food takeaway (eating out); public houses/bars/clubs (socialising with a drink); cinema, theatres and concert halls (entertainment); betting offices, gaming centres, bingo (partaking in a game of chance); and gyms, leisure centres, swimming venues (recreation).

Mixed Retailing - For the purpose of this Study mixed retailing refers to a retail unit or group of shops selling both convenience and comparison goods.

Mixed Use Development - A development comprising a number of land uses, such as residential, retail, office and leisure use. Where the development has a predominant use, for e.g. retailing, it is often described as retail-led.

Net retail area – this is also referred to as sales space and includes the area of the unit which is devoted to the display and sale of retail goods. It includes checkout counters, packing zones, circulation space from check-outs to exit lobby, changing-rooms and information areas. Net retail floorspace is calculated by way of internal measurement to the inner face of the wall.

Out-of-centre - A location outside a town centre boundary but within defined development limits.

Out-of-town - A location outside defined development limits of settlements.

Prime Retail Frontage – Designation of the busiest shopping streets that normally contain the prime pitches, where conversion to non-retail uses will not normally be permitted at ground floor level.

Retail Core – Part of the town centre containing the largest concentration of shopping and areas for retail-led investment and regeneration.

Retail warehouse - Large single-level individual store, with car parking, for the sale of bulky comparison items such as DIY goods, furniture, electrical goods, carpets, gardening goods, etc. Their minimum unit size (exclusive of mezzanine) is 700 gross sqm.

Retail warehouse park - agglomeration of at least three retail warehouses.

Supermarket - Self-service store selling mainly food, with a gross retail floorspace of less than 2500 square metres, often with its own car parking.

Superstore - Self-service store selling mainly food, or food and non-food goods, with a gross retail floorspace of more than 2500 square metres, with car parking.

Town/City Centre – Town/City centres comprise a mix of facilities which perform a broad range of functions relating to retail, leisure, commercial, tourism, residential, community and civic use. At the focus of a transportation network the City Centre affords the population convenient access to a wide range of services.

Appendix 2

Copy of questionnaire

Belfast Household Shopper Survey (by Telephone)

Good morning/ afternoon/ evening.

My name is [Interviewer Name] and I am calling from SRI (*Strategic Research and Insight Ltd*), an independent research agency, working on behalf of Belfast City Council. We are carrying out a short survey of residents in Belfast about shopping habits. Could you please spare me a few minutes to answer some quick questions? The survey will take no longer than 10 minutes.

May I speak to the person who does most of your household shopping?

Just so we are calling the correct area, your home postcode is: [Refer to database]**, is this correct?**
Please assure respondent we will not be sending another in the post to them

Postcode is correct.. ☐

Postcode is incorrect - close interview/ amend, if appropriate .... ☐

Convenience Goods Shopping

Convenience goods are generally grocery items and everyday consumables that you buy regularly and locally

Q1 To start with, can I ask which store you visit to do most of your MAIN FOOD/grocery shopping?
Tick one box only & only tick several if the respondent states that a number of stores are equally visited

- Asda, Shore Road BT15 3PR .. ☐
- Asda, Westwood Centre, BT11 9BQ .... ☐
- Coop, Antrim Road.................. ☐
- Coop, Ballysillan Road .... ☐
- Coop, Beersbridge Road.......... ☐
- Coop, Connsbrook Avenue ...... ☐
- Coop, Cregagh Road .... ☐
- Coop, Kings Road .... ☐
- Coop, Lisburn Road .... ☐
- Coop, Oldpark Road .... ☐
- Coop, Ormeau Road .... ☐
- Coop, Rosetta Road................ ☐
- Coop, Shankill Road .... ☐
- Coop, Upper Lisburn Road ...... ☐
- Coop, Upper Malone Road ...... ☐
- Coop, Whitewell Road.............. ☐
- Dunnes Stores, Ormeau Road. ☐
- Dunnes Stores, High Street (Belfast City Centre)................. ☐
- Iceland, Andersonstown Road . ☐
- Iceland, Antrim Road............... ☐
- Iceland, Ballysillian Road .... ☐
- Iceland, Bridge Street (Belfast City Centre) .... ☐
- Iceland, Brougham St/Yorkgate............................. ☐
- Iceland, Castle Street (Belfast City Centre) .... ☐
- Iceland, Cregagh Road .... ☐
- Iceland, Finaghy Road South... ☐
- Iceland, Kennedy Centre, West Belfast .... ☐
- Iceland, NewtownaRoads Road .... ☐
- Iceland, Park Centre .... ☐
- Iceland, Shankill Road .... ☐
- Iceland, Upper NewtownaRoads Road .... ☐
- Lidl, Andersonstown Road .... ☐
- Lidl, Connswater Centre 38...... ☐
- Lidl, High Street...................... ☐
- Lidl, Montgomery Road, Castlereagh .... ☐
- Lidl, Old Glenmount Road, Newtownabbey........................ ☐
- Lidl, Shore Road...................... ☐
- Lidl, Stewartstown Road, West Belfast .... ☐
- Marks & Spencer, Boucher Plaza .... ☐
- Marks & Spencer, City Centre.. ☐
- Marks & Spencer, Forestside Centre.................................... ☐
- Marks & Spencer, Lisburn Road .... ☐
- Marks & Spencer, Sprucefield.. ☐
- Sainsburys, Forestside Centre. ☐
- Sainsburys, Holywood Exchange .... ☐
- Sainsburys, Kennedy Centre, Andersonstown Road.............. ☐
- Sainsburys, Sprucefield, Lisburn.................................... ☐
- Supervalu, Dairyfarm complex, Stewartstown Road .... ☐
- Supervalu, Kings Square, East Belfast .... ☐
- Tesco superstore, Abbey Retail Park, Newtownabbey..... ☐
- Tesco superstore, Antrim Road... ☐
- Tesco superstore, Ballygomartin Road................. ☐
- Tesco superstore, Castlereagh Road... ☐
- Tesco superstore, Dunmurry ... ☐
- Tesco superstore, Knocknagoney Road Extra ...... ☐
- Tesco superstore, Lisburn Road... ☐
- Tesco superstore, Newtownbreda .... ☐
- Tesco superstore, Northcott Extra, Newtownabbey .... ☐
- Tesco superstore, Yorkgate Centre.................................... ☐
- Tesco Express, Dublin Road ... ☐
- Tesco Express, Great Victoria Street...................................... ☐
- Tesco Express, Ormeau Road. ☐
- Tesco Express, Royal Avenue . ☐
- Tesco Express, University Road... ☐
- Shop mainly online.................. ☐
- Other .... ☐

Online store (please specify store) ☐

Other (please specify store and location) ☐

Q2 You said that {Q1} is your main store for food/grocery shopping. How often do you visit that store for food and grocery shopping?
Tick one box only

- Daily ☐
- Several times a week ☐
- Once a week ☐
- Once a fortnight ☐
- Once a month ☐
- Less than once a month ☐

Q3 How do you normally travel to shop for your food/groceries?
If more than one mode of transport, record the one for the longest part of journey

- Car (as driver/passenger) ☐
- Walk ☐
- Bus ☐
- Taxi ☐
- Train ☐
- Cycle ☐
- Other ☐

Other (please specify) ______

Q4 How long does the journey take?
Tick one box only

- 0 - 5 minutes ☐
- 6 - 10 minutes ☐
- 11 - 15 minutes ☐
- 16 - 20 minutes ☐
- 21 - 30 minutes ☐
- 31 - 45 minutes ☐
- 46 - 60 minutes ☐
- An hour or more ☐
- Don't know ☐

Q5 Why do you choose to shop at {Q1} for these goods?
Do not read out - Tick all that apply

- Convenient / close to home ☐
- Convenient / close to work ☐
- Free parking ☐
- On the bus route ☐
- Wide range of goods available ☐
- Reasonable prices ☐
- Preference to shop at a particular store ☐
- Near to other shops so can shop around ☐
- Habit, have always used the store ☐
- Offers and discounts (including Loyalty schemes) ☐
- Don't know ☐
- Other ☐

Other (please specify) ______

Q6 On average, how much do you spend on food/groceries each week?
Tick one box only

- Less than £20 ☐
- £21-40 ☐
- £41-60 ☐
- £61-80 ☐
- £81-100 ☐
- £101-120 ☐
- £121-140 ☐
- £141-160 ☐
- £161-180 ☐
- £181-200 ☐
- £201-220 ☐
- Over £220 ☐
- Don't know ☐
- Prefer not to say ☐
- Other ☐

Other (please specify) ______

Q7 If you shop online, can I ask what percentage of your total food shopping is carried out on the internet, roughly speaking?
Tick one box only

- **None - don't shop online** ☐
- 0-10% ☐
- 11-20% ☐
- 21-30% ☐
- 31-40% ☐
- 41-50% ☐
- 51-60% ☐
- 61-70% ☐
- 71-80% ☐
- 81-90% ☐
- 91-100% ☐
- Don't know ☐
- Prefer not to say ☐

Comparison Goods Shopping (Non-food shopping)

Comparison goods are durable goods such as clothes, footwear, jewellery, etc that you shop around for in order to compare price and quality

Q8 Can you please tell me where you choose to do most of your shopping for items like clothes, shoes and other fashion items like jewellery, handbags, etc?
Tick one box only & only tick several if the respondent states that a number of locations are equally visited

- Belfast City Centre ☐
- Boucher Retail Park ☐
- Connswater Shopping Centre ☐
- Dairy Farm Centre ☐
- Forestside Shopping Centre ☐
- Junction One (Antrim) ☐
- Kennedy Centre ☐
- Park Centre ☐
- The Outlet (Banbridge) ☐
- Sprucefield (Lisburn) ☐
- Westwood Centre (Asda, etc) ☐
- Yorkgate (ASDA Living, etc) ☐
- Sainsburys ☐
- Tesco ☐
- ASDA ☐
- Online/ internet ☐
- Don't know ☐
- Other ☐

Sainsburys (specify location) ☐

Tesco (specify location) ☐

ASDA (specify location) ☐

Other (please specify) ☐

Q9 Why do you choose to shop at that centre/these centres?
Do not read out - Tick all that apply

- Convenient/ close to home ☐
- Convenient/ close to work ☐
- Free parking ☐
- On the bus route ☐
- Wide range of goods available ☐
- Reasonable prices ☐
- Preference to shop at a particular store ☐
- Near to other shops so can shop around ☐
- Habit, have always used the store ☐
- Don't know ☐
- Other ☐

Other (please specify) ☐

Q10 Do you visit other shops, businesses, or places of leisure or entertainment when you shop for these goods? If so, which type of premises do you visit?
Tick all that apply

- Food / grocery shops e.g. supermarket, butcher, bakery, etc ☐
- Other non-food shops e.g. electrical stores, furniture shops, post office, chemist, hairdressers, etc ☐
- Eateries e.g. cafe, restaurant, coffee shop, etc ☐
- Services e.g. banks, solicitors, insurance, etc ☐
- Licensed premises e.g. pub, betting office, bingo, etc ☐
- Entertainment facilities e.g. cinema, theatre, bowling, etc ☐
- Recreational/leisure facilities e.g. Gym, swimming pool, etc ☐
- No - don't visit other shops, businesses or places of leisure or entertainment ☐
- Other ☐

Other (please specify) ☐

Q11 If you shop on the Internet for clothes and footwear and other fashion items, can I ask what percentage of your total expenditure on these items is carried out online - approximately?
Tick one box only

- **None - don't shop online for these types of goods** ☐
- 0-10% ☐
- 11-20% ☐
- 21-30% ☐
- 31-40% ☐
- 41-50% ☐
- 51-60% ☐
- 61-70% ☐
- 71-80% ☐
- 81-90% ☐
- 91-100% ☐
- Don't know ☐
- Prefer not to say ☐

Bulky Goods Shopping (Non-food shopping)

Bulky goods are large durable goods such as big electrical items (e.g. fridges, washing machines, TVs, etc) and furniture (sofas, beds, tables) that you shop less often for, and which you generally rely on being delivered to the home

Q12 Can I ask where you do most of your shopping for large bulky items like electrical goods (e.g. large TVs, fridges, washing machines, dishwashers)?
Tick one box only & only tick several if the respondent states that a number of locations are equally visited

- Andersonstown (West Belfast) ☐
- Abbeycentre/Abbey Retail Park ☐
- Belfast City Centre ☐
- Boucher Road (includes Boucher Retail Park, Shane Retail Park, Boucher Plaza, Lesley Retail Park) ☐
- Connswater Shopping Centre/Retail Park ☐
- Forestside (includes Drumkeen Retail Park) ☐
- Harbour Exchange (includes IKEA, Harvey Norman, B & Q) ☐
- Kennedy Centre (Falls Road, West Belfast) ☐
- Newtownards Road ☐
- Park Centre ☐
- Shankill Road ☐
- Sprucefield (Lisburn) ☐
- Westwood Centre ☐
- Yorkgate (aka Cityside) ☐
- Online / internet ☐
- Don't know ☐
- Other ☐

Other (please specify) ☐

Q13 Can I ask where you do most of your shopping for large household items like sofas, wardrobes, tables, beds, tables and chairs, etc)?
Tick one box only & only tick several if the respondent states that a number of locations are equally visited

- Abbeycentre/Abbey Retail Park ☐
- Andersonstown (West Belfast) ☐
- Belfast City Centre ☐
- Boucher Road (includes Boucher Retail Park, Shane Retail Park, Boucher Plaza, Lesley Retail Park) ☐
- Connswater Shopping Centre/Retail Park ☐
- Forestside (includes Drumkeen Retail Park) ☐
- Harbour Exchange (includes IKEA, Harvey Norman, B & Q) ☐
- Kennedy Centre (Falls Road, West Belfast) ☐
- Newtownards Road ☐
- Park Centre ☐
- Shankill Road ☐
- Sprucefield (Lisburn) ☐
- Westwood Centre ☐
- Yorkgate (aka Cityside) ☐
- Online / internet ☐
- Don't know ☐
- Other ☐

Other (please specify) ☐

View on City Centre - Existing Shopping and Future Prospects

Q14 If you visit Belfast City Centre for shopping how satisfied are you with shopping facilities available in Belfast City Centre?
Read out - Tick one box only

- Very satisfied ☐
- Satisfied ☐
- Neither satisfied nor dissatisfied ☐
- Dissatisfied ☐
- Very dissatisfied ☐
- Don't go to Belfast City Centre for shopping **- Do not read out** ☐
- Don't know **- Do not read out** ☐

Q15 If dissatisfied or very dissatisfied with shopping in Belfast City Centre, can you tell me why this is so?
Do not read out - Tick all that apply

- Limited range of shops available ☐
- Parking costs ☐
- Traffic congestion ☐
- Poor quality of shopping area (vacancy/dereliction) ☐
- Expensive ☐
- Don't feel safe ☐
- Too far to get to ☐
- Nothing in particular ☐
- Don't know ☐
- Other ☐

Other (please specify) ☐

Q16 Outside of shopping, do you visit Belfast City Centre for any other reason?
Tick all that apply

- To work ☐
- Social reasons - (a) to go to restaurant/cafe ☐
- Social reasons - (b) go to the pub/nightclub ☐
- Entertainment purposes - (a) go to theatre/cinema ☐
- Entertainment purposes - (b) bingo/bookies/gaming centre ☐
- Recreational/fitness purposes - e.g. go to gym, for a swim, etc ☐
- To avail of services e.g. Banks, Solicitors, Insurance, etc ☐
- Educational purposes e.g. college/nightclass/attend library ☐
- Civic/religious purposes e.g. Council/Church ☐
- To visit art galleries/museums ☐
- Live there ☐
- Don't visit Belfast City Centre ☐
- Other ☐

Other (please specify) ☐

Q17 On average, how often do you visit Belfast City Centre?
Tick one box only

- Daily ☐
- Several times a week ☐
- Once a week ☐
- Once a fortnight ☐
- Once a month ☐
- Less than once a month ☐

Q18 Generally speaking, is there anything you would like to see improved in Belfast City Centre that would encourage you to visit more often?
Tick all that apply

- More shops ☐
- Better quality of shops ☐
- Less traffic congestion ☐
- Better accessibility/connectivity ☐
- Better availability of parking ☐
- Lower cost of parking ☐
- More policing/better safety ☐
- More civic/green open space (including public art displays) ☐
- Better condition of shopping streets ☐
- Less vacant/derelict buildings ☐
- More leisure and recreational facilities e.g. gym, swimming pool ☐
- More restaurants/cafes ☐
- More or Less pubs/nightclubs ☐
- More places of entertainment e.g. theatre, cinema ☐
- More public and cultural events (e.g. festivals, markets, street entertainment) ☐
- No need for improvement ☐
- Don't know ☐
- Other ☐

Other (please specify) ☐

Demographics

Q19 Finally, can I ask which age group you belong to?
Read out - Tick one box only

- Under 20 ☐
- 20-29 ☐
- 30-39 ☐
- 40-49 ☐
- 50-65 ☐
- Over 65 ☐
- Refused to state ☐

Q20 Gender of respondent (record by observation only)

- Male ☐
- Female ☐

INTERVIEWERS PLEASE READ OUT TO ALL RESPONDENTS:

Thank you for participating in this survey. If you wish to check the credentials of Strategic Research and Insight (SRI), I can provide the telephone number for the Market Research Society, who will be able to verify our company. Would you like to take the number? 0500 39 69 99

Please check your work because once you move on you will not be able to return to this record.

ID (from database) ____________________

Interviewer Initials ____________________

Note any other comments here: ____________________

Appendix 3

Summary of Household Survey findings

Belfast Household Shopper Survey

Final Marked-up Questionnaire Results

Region

Belfast Centre	19 (3.7%)
East Belfast	128 (25.1%)
North Belfast	121 (23.7%)
South Belfast	114 (22.4%)
West Belfast	128 (25.1%)

Postcode Sector

BT1 1	0 (0.0%)	BT5 5	10 (2.0%)	BT15 4	11 (2.2%)	BT9 7	10 (2.0%)
BT1 2	3 (0.6%)	BT5 6	11 (2.2%)	BT15 5	12 (2.4%)	BT11 8	12 (2.4%)
BT1 3	4 (0.8%)	BT5 7	10 (2.0%)	BT36 7	12 (2.4%)	BT11 9	11 (2.2%)
BT1 4	0 (0.0%)	BT6 9	10 (2.0%)	BT10 0	11 (2.2%)	BT12 4	21 (4.1%)
BT1 5	0 (0.0%)	BT6 0	19 (3.7%)	BT12 5	16 (3.1%)	BT12 7	11 (2.2%)
BT1 6	0 (0.0%)	BT6 8	18 (3.5%)	BT12 6	10 (2.0%)	BT13 1	21 (4.1%)
BT2 7	2 (0.4%)	BT14 6	13 (2.5%)	BT7 1	10 (2.0%)	BT13 2	19 (3.7%)
BT2 8	10 (2.0%)	BT14 7	11 (2.2%)	BT7 2	17 (3.3%)	BT13 3	11 (2.2%)
BT4 1	11 (2.2%)	BT14 8	13 (2.5%)	BT7 3	10 (2.0%)	BT17 0	11 (2.2%)
BT4 2	10 (2.0%)	BT15 1	19 (3.7%)	BT8 7	10 (2.0%)	BT17 9	11 (2.2%)
BT4 3	10 (2.0%)	BT15 2	19 (3.7%)	BT9 5	10 (2.0%)		
BT5 4	19 (3.7%)	BT15 3	11 (2.2%)	BT9 6	10 (2.0%)		

Convenience Goods Shopping

Convenience goods are generally grocery items and everyday consumables that you buy regularly and locally

Q1 To start with, can I ask which store you visit to do most of your MAIN FOOD/grocery shopping?

Tick one box only & only tick several if the respondent states that a number of stores are equally visited

Asda, Shore Road BT15 3PR	37 (7.3%)
Asda, Westwood Centre, BT11 9BQ	29 (5.7%)
Asda, Dundonald	7 (1.4%)
Coop, Antrim Road	2 (0.4%)
Coop, Ballysillan Road	2 (0.4%)
Coop, Beersbridge Road	0 (0.0%)
Coop, Connsbrook Avenue	0 (0.0%)
Coop, Cregagh Road	1 (0.2%)
Coop, Kings Road	2 (0.4%)
Coop, Lisburn Road	2 (0.4%)
Coop, Oldpark Road	1 (0.2%)
Coop, Ormeau Road	1 (0.2%)
Coop, Rosetta Road	3 (0.6%)

Coop, Shankill Road	4 (0.8%)
Coop, Upper Lisburn Road	0 (0.0%)
Coop, Upper Malone Road	1 (0.2%)
Coop, Whitewell Road	0 (0.0%)
Dunnes Stores, Ormeau Road	7 (1.4%)
Dunnes Stores, High Street (Belfast City Centre)	3 (0.6%)
Iceland, Andersonstown Road	2 (0.4%)
Iceland, Antrim Road	0 (0.0%)
Iceland, Ballysillian Road	5 (1.0%)
Iceland, Bridge Street (Belfast City Centre)	7 (1.4%)
Iceland, Brougham St/Yorkgate	7 (1.4%)
Iceland, Castle Street (Belfast City Centre)	2 (0.4%)
Iceland, Cregagh Road	5 (1.0%)
Iceland, Finaghy Road South	5 (1.0%)
Iceland, Kennedy Centre, West Belfast	2 (0.4%)
Iceland, NewtownaRoads Road	3 (0.6%)
Iceland, Park Centre	8 (1.6%)
Iceland, Shankill Road	12 (2.4%)
Iceland, Upper NewtownaRoads Road	0 (0.0%)
Lidl, Andersonstown Road	5 (1.0%)
Lidl, Connswater Centre 38	7 (1.4%)
Lidl, High Street	3 (0.6%)
Lidl, Montgomery Road, Castlereagh	4 (0.8%)
Lidl, Old Glenmount Road, Newtownabbey	0 (0.0%)
Lidl, Shore Road	9 (1.8%)
Lidl, Stewartstown Road, West Belfast	1 (0.2%)
Marks & Spencer, Boucher Plaza	7 (1.4%)
Marks & Spencer, City Centre	3 (0.6%)
Marks & Spencer, Forestside Centre	14 (2.7%)
Marks & Spencer, Lisburn Road	8 (1.6%)
Marks & Spencer, Sprucefield	3 (0.6%)
Sainsburys, Forestside Centre	31 (6.1%)
Sainsburys, Holywood Exchange	5 (1.0%)
Sainsburys, Kennedy Centre, Andersonstown Road	27 (5.3%)
Sainsburys, Sprucefield, Lisburn	2 (0.4%)
Supervalu, Dairyfarm complex, Stewartstown Road	1 (0.2%)
Supervalu, Kings Square, East Belfast	0 (0.0%)
Tesco superstore, Abbey Retail Park, Newtownabbey	6 (1.2%)
Tesco superstore, Antrim Road	13 (2.5%)
Tesco superstore, Ballygomartin Road	31 (6.1%)
Tesco superstore, Castlereagh Road	53 (10.4%)
Tesco superstore, Dunmurry	8 (1.6%)
Tesco superstore, Knocknagoney Road Extra	33 (6.5%)
Tesco superstore, Lisburn Road	19 (3.7%)
Tesco superstore, Newtownbreda	29 (5.7%)
Tesco superstore, Northcott Extra, Newtownabbey	10 (2.0%)
Tesco superstore, Yorkgate Centre	39 (7.6%)
Tesco Express, Dublin Road	3 (0.6%)
Tesco Express, Great Victoria Street	1 (0.2%)
Tesco Express, Ormeau Road	1 (0.2%)
Tesco Express, Royal Avenue	12 (2.4%)

Tesco Express, University Road	1 (0.2%)
Shop mainly online	9 (1.8%)
Other	44 (8.6%)

Q2 You said that <Q1> is your main store for food/grocery shopping. How often do you visit that store for food and grocery shopping?
Tick one box only

Daily	48 (9.4%)
Several times a week	190 (37.3%)
Once a week	228 (44.7%)
Once a fortnight	30 (5.9%)
Once a month	11 (2.2%)
Less than once a month	3 (0.6%)

Q3 How do you normally travel to shop for your food/groceries?
If more than one mode of transport, record the one for the longest part of journey

Car (as driver/passenger)	328 (64.3%)
Walk	116 (22.7%)
Bus	18 (3.5%)
Taxi	32 (6.3%)
Train	0 (0.0%)
Cycle	3 (0.6%)
Other	13 (2.5%)

Q4 How long does the journey take?
Tick one box only

0 - 5 minutes	198 (38.8%)
6 - 10 minutes	164 (32.2%)
11 - 15 minutes	63 (12.4%)
16 - 20 minutes	44 (8.6%)
21 - 30 minutes	18 (3.5%)
31 - 45 minutes	2 (0.4%)
46 - 60 minutes	4 (0.8%)
An hour or more	3 (0.6%)
Don't know	14 (2.7%)

Q5 Why do you choose to shop at <Q1> for these goods?
Do not read out - Tick all that apply

Convenient / close to home	347 (69.4%)
Convenient / close to work	13 (2.6%)
Free parking	17 (3.4%)
On the bus route	3 (0.6%)
Wide range of goods available	106 (21.2%)
Reasonable prices	92 (18.4%)
Preference to shop at a particular store	52 (10.4%)
Near to other shops so can shop around	15 (3.0%)
Habit, have always used the store	31 (6.2%)
Offers and discounts (including Loyalty schemes)	7 (1.4%)

Don't know	2 (0.4%)
Other	24 (4.8%)

Q6 On average, how much do you spend on food/groceries each week?
Tick one box only

Less than £20	14 (2.7%)
£21-40	85 (16.7%)
£41-60	101 (19.8%)
£61-80	84 (16.5%)
£81-100	72 (14.1%)
£101-120	37 (7.3%)
£121-140	20 (3.9%)
£141-160	19 (3.7%)
£161-180	4 (0.8%)
£181-200	6 (1.2%)
£201-220	1 (0.2%)
Over £220	3 (0.6%)
Don't know	53 (10.4%)
Prefer not to say	11 (2.2%)
Other	0 (0.0%)

Q7 If you shop online, can I ask what percentage of your total food shopping is carried out on the internet, roughly speaking?
Tick one box only

None - don't shop online	444 (87.1%)
0-10%	24 (4.7%)
11-20%	6 (1.2%)
21-30%	4 (0.8%)
31-40%	4 (0.8%)
41-50%	5 (1.0%)
51-60%	4 (0.8%)
61-70%	2 (0.4%)
71-80%	7 (1.4%)
81-90%	1 (0.2%)
91-100%	7 (1.4%)
Don't know	2 (0.4%)
Prefer not to say	0 (0.0%)

Comparison Goods Shopping (Non-food shopping)

Comparison goods are durable goods such as clothes, footwear, jewellery, etc that you shop around for in order to compare price and quality

Q8 Can you please tell me where you choose to do most of your shopping for items like clothes, shoes and other fashion items like jewellery, handbags, etc?
Tick one box only & only tick several if the respondent states that a number of locations are equally visited

Abbey Centre	29 (5.7%)
Belfast City Centre	306 (60.0%)
Boucher Retail Park	26 (5.1%)
Connswater Shopping Centre	11 (2.2%)
Dairy Farm Centre	1 (0.2%)
Forestside Shopping Centre	53 (10.4%)
Junction One (Antrim)	2 (0.4%)
Kennedy Centre	13 (2.5%)
Park Centre	1 (0.2%)
The Outlet (Banbridge)	4 (0.8%)
Sprucefield (Lisburn)	20 (3.9%)
Westwood Centre (Asda, etc)	1 (0.2%)
Yorkgate (ASDA Living, etc)	3 (0.6%)
Sainsburys	2 (0.4%)
Tesco	9 (1.8%)
ASDA	11 (2.2%)
Online/ internet	56 (11.0%)
Catalogue	2 (0.4%)
Don't know	16 (3.1%)
Other	33 (6.5%)

Q9 Why do you choose to shop at that centre/these centres?
Do not read out - Tick all that apply

Convenient/ close to home	196 (38.4%)
Convenient/ close to work	14 (2.7%)
Free parking	53 (10.4%)
On the bus route	28 (5.5%)
Wide range of goods available	184 (36.1%)
Reasonable prices	55 (10.8%)
Preference to shop at a particular store	67 (13.1%)
Near to other shops so can shop around	75 (14.7%)
Habit, have always used the store	13 (2.5%)
Don't know	31 (6.1%)
Other	35 (6.9%)

Q10 Do you visit other shops, businesses, or places of leisure or entertainment when you shop for these goods? If so, which type of premises do you visit?
Tick all that apply

Food / grocery shops e.g. supermarket, butcher, bakery, etc	46 (9.0%)
Other non-food shops e.g. electrical stores, furniture shops, post office, chemist, hairdressers, etc	31 (6.1%)
Eateries e.g. cafe, restaurant, coffee shop, etc	256 (50.2%)
Services e.g. banks, solicitors, insurance, etc	29 (5.7%)
Licensed premises e.g. pub, betting office, bingo, etc	7 (1.4%)
Entertainment facilities e.g. cinema, theatre, bowling, etc	37 (7.3%)
Recreational/leisure facilities e.g. Gym, swimming pool, etc	7 (1.4%)
No - don't visit other shops, businesses or places of leisure or entertainment	212 (41.6%)
Other	0 (0.0%)

Q11 If you shop on the Internet for clothes and footwear and other fashion items, can I ask what percentage of your total expenditure on these items is carried out online - approximately?
Tick one box only

None - don't shop online for these types of goods	290 (56.9%)
0-10%	62 (12.2%)
11-20%	39 (7.6%)
21-30%	13 (2.5%)
31-40%	13 (2.5%)
41-50%	28 (5.5%)
51-60%	12 (2.4%)
61-70%	6 (1.2%)
71-80%	9 (1.8%)
81-90%	4 (0.8%)
91-100%	21 (4.1%)
Don't know	12 (2.4%)
Prefer not to say	1 (0.2%)

Bulky Goods Shopping (Non-food shopping)

Bulky goods are large durable goods such as big electrical items (e.g. fridges, washing machines, TVs, etc) and furniture (sofas, beds, tables) that you shop less often for, and which you generally rely on being delivered to the home

Q12 Can I ask where you do most of your shopping for large bulky items like electrical goods (e.g. large TVs, fridges, washing machines, dishwashers)?
Tick one box only & only tick several if the respondent states that a number of locations are equally visited

Andersonstown (West Belfast)	13 (2.5%)
Abbeycentre/Abbey Retail Park	76 (14.9%)
Belfast City Centre	88 (17.8%)
Boucher Road (includes Boucher Retail Park, Shane Retail Park, Boucher Plaza, Lesley Retail Park)	68 (13.8%)
Connswater Shopping Centre/Retail Park	14 (2.8%)

Forestside (includes Drumkeen Retail Park)	70 (14.2%)
Harbour Exchange (includes IKEA, Harvey Norman, B & Q)	9 (1.8%)
Kennedy Centre (Falls Road, West Belfast)	6 (1.2%)
Montgomery Road, Castlereagh	10 (2.0%)
Newtownards Road	1 (0.2%)
Park Centre	2 (0.4%)
Shankill Road	2 (0.4%)
Sprucefield (Lisburn)	21 (4.3%)
Westwood Centre	2 (0.4%)
Yorkgate (aka Cityside)	5 (1.0%)
Online / internet	80 (16.2%)
Don't know	48 (9.7%)
Catalogue	4 (0.8%)
Tesco	4 (0.8%)
Other	19 (3.7%)

Q13 Can I ask where you do most of your shopping for large household items like sofas, wardrobes, tables, beds, tables and chairs, etc)?

Tick one box only & only tick several if the respondent states that a number of locations are equally visited

Abbeycentre/Abbey Retail Park	35 (6.9%)
Andersonstown (West Belfast)	14 (2.8%)
Belfast City Centre	33 (6.5%)
Boucher Road (includes Boucher Retail Park, Shane Retail Park, Boucher Plaza, Lesley Retail Park)	116 (22.8%)
Connswater Shopping Centre/Retail Park	7 (1.4%)
Forestside (includes Drumkeen Retail Park)	6 (1.2%)
Holywood Exchange (includes IKEA, Harvey Norman, B & Q)	57 (11.2%)
Kennedy Centre (Falls Road, West Belfast)	17 (3.3%)
Newtownards Road	2 (0.4%)
Park Centre	1 (0.2%)
Shankill Road	2 (0.4%)
Sprucefield (Lisburn)	12 (2.4%)
Westwood Centre	3 (0.6%)
Yorkgate (aka Cityside)	3 (0.6%)
Online / internet	56 (11.0%)
Catalogue	4 (0.8%)
Rite Price, York Rd	2 (0.4%)
Don't know	124 (24.4%)
Other	44 (8.6%)

View on City Centre - Existing Shopping and Future Prospects

Q14 If you visit Belfast City Centre for shopping how satisfied are you with shopping facilities available in Belfast City Centre?

Read out - Tick one box only

Very satisfied	153 (30.0%)
Satisfied	199 (39.0%)
Neither satisfied nor dissatisfied	47 (9.2%)
Dissatisfied	32 (6.3%)
Very dissatisfied	14 (2.7%)
Don't go to Belfast City Centre for shopping **- Do not read out**	62 (12.2%)
Don't know **- Do not read out**	3 (0.6%)

Q15 If dissatisfied or very dissatisfied with shopping in Belfast City Centre, can you tell me why this is so?

Do not read out - Tick all that apply

Limited range of shops available	26 (56.5%)
Parking costs	15 (32.6%)
Traffic congestion	4 (8.7%)
Poor quality of shopping area (vacancy/dereliction)	11 (23.9%)
Expensive	10 (21.7%)
Don't feel safe	4 (8.7%)
Lack of independent shops	3 (6.5%)
Lack of car parking	3 (6.5%)
Too far to get to	0 (0.0%)
Nothing in particular	1 (2.2%)
Don't know	0 (0.0%)
Other	6 (13.0%)

Q16 Outside of shopping, do you visit Belfast City Centre for any other reason?

Tick all that apply

To work	36 (7.1%)
Social reasons - (a) to go to restaurant/cafe	170 (33.5%)
Social reasons - (b) go to the pub/nightclub	81 (15.9%)
Entertainment purposes - (a) go to theatre/cinema	85 (16.7%)
Entertainment purposes - (b) bingo/bookies/gaming centre	5 (1.0%)
Recreational/fitness purposes - e.g. go to gym, for a swim, etc	24 (4.7%)
To avail of services e.g. Banks, Solicitors, Insurance, etc	36 (7.1%)
Educational purposes e.g. college/nightclass/attend library	4 (0.8%)
Civic/religious purposes e.g. Council/Church	5 (1.0%)
To visit art galleries/museums	31 (6.1%)
Live there	4 (0.8%)
Don't visit Belfast City Centre	203 (40.0%)
Other	36 (7.1%)

Q17 On average, how often do you visit Belfast City Centre?
Tick one box only

Daily	38 (7.5%)
Several times a week	77 (15.1%)
Once a week	83 (16.3%)
Once a fortnight	69 (13.5%)
Once a month	93 (18.2%)
Less than once a month	150 (29.4%)

Q18 Generally speaking, is there anything you would like to see improved in Belfast City Centre that would encourage you to visit more often?
Tick all that apply

More shops	61 (12.0%)
Better quality of shops	34 (6.7%)
Less traffic congestion	28 (5.5%)
Better accessibility/connectivity	36 (7.1%)
Better availability of parking	80 (15.7%)
Lower cost of parking	109 (21.4%)
More policing/better safety	14 (2.7%)
More civic/green open space (including public art displays)	12 (2.4%)
Better condition of shopping streets	15 (2.9%)
Less vacant/derelict buildings	29 (5.7%)
More leisure and recreational facilities e.g. gym, swimming pool	6 (1.2%)
More restaurants/cafes	12 (2.4%)
More or Less pubs/nightclubs	2 (0.4%)
More places of entertainment e.g. theatre, cinema	12 (2.4%)
More public and cultural events (e.g. festivals, markets, street entertainment)	20 (3.9%)
No need for improvement	172 (33.7%)
Don't know	47 (9.2%)
Other	135 (26.5%)

Demographics

Q19 Finally, can I ask which age group you belong to?
Read out - Tick one box only

Under 20	7 (1.4%)
20-29	14 (2.7%)
30-39	64 (12.5%)
40-49	95 (18.6%)
50-65	175 (34.3%)
Over 65	147 (28.8%)
Refused to state	8 (1.6%)

Q20 Gender of respondent (record by observation only)

Male	156 (30.6%)
Female	354 (69.4%)