



Belfast Local Development Plan

Technical Supplement 4
Belfast city centre and retailing
August 2018



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1.0 Introduction

Purpose of document

- 1.1 This technical document has been prepared to draw together the evidence base that has been used to inform the preparation of the Belfast Local Development Plan (LDP) 2035. It is one of a suite of topic-based Technical Supplements that should be read alongside the LDP to understand the rationale and justification for the policies proposed within the draft Plan Strategy.
- 1.2 It builds upon the suite of 17 thematic Topic Papers prepared and published alongside the Preferred Options Paper (POP), which established the baseline position as at April 2017 and identified the key issues that need to be addressed by the LDP. This city centre and retailing Technical Supplement therefore updates this baseline position and sets out the evidence base that has informed each of the retailing and main centre use policies within the draft Plan Strategy.
- 1.3 Again, it forms part of a series of thematic reports to accompany the draft Plan Strategy. Each Topic Paper can be read separately but, inevitably, there are important related matters in other Technical Supplements also.
- 1.4 It should be noted that the evidence base collected to inform the LDP also forms the basis on which a series of additional assessments and appraisals required as part of the plan preparation process, most notably the Sustainability Appraisal. By combining the evidence gathering stages for both the Sustainability Appraisal and Local Development Plan, we aim to streamline the documentation produced and avoid duplication. It will also help to ensure that sustainable development is embedded in the planning process and that the Sustainability Appraisal is one of the main drivers informing the preparation of the LDP.

Planning for retailing and the city

- 1.5 Retailing in Belfast was previously used as a regeneration tool to create a more accessible vibrant centre to offer more choice for shopping, social activity and recreation. Prior to the construction of Victoria Square shopping centre in 2008 much of the gross retail floor space was developed outside the city centre which resulted in some centres and out of centre locations over trading in competition with the city centre encouraged by duplicate store offerings and prevalence of free private car parking.
- 1.6 A major factor of economic change recently has been the rise of online retailing, which has marked the high street as consumers habits and shopping patterns change prompting the rise of retail vacancy and growth of retail services such as food and beverage outlets. This trend is set to continue alongside the growth of other main centre uses such as leisure and office accommodation responding to future consumer demands and trends in the marketplace. In light of these factors planning for retailing will require a holistic approach as the offering of the city evolves its offering to ensure its future economic growth and competitiveness.

- 1.7 The Topic Paper entitled 'Belfast City Centre and Retailing' was published on 26th January 2017 for publication alongside the Preferred Options Paper. It has been updated to ensure the evidence base is updated for publication alongside the Draft Plan Strategy.
- 1.8 This technical supplement considers the commercial/retail sector within the economic context of Belfast Local Government District. It outlines the land use needs for growth of the sector based on the retail and leisure capacity study undertaken by Braniff Consultants September 2017. It updates links to the Community Plan (Belfast Agenda) based on its publication on 30th November 2017 and ongoing strategic work carried out by the Council.
- 1.9 It is important that the new plan is based on an accurate assessment of the scale and type of new retailing and city centre uses to be planned for the city. The best information has been used in compiling this paper however it may need to be revised in light of the release of any new evidence. This supplement will provide a foundation on which work can commence on a local policies plan for Belfast city council to replace that contained in the existing draft Belfast Metropolitan Area Plan/Belfast Urban Area Plan.

2.0 Policy Context

Regional

Regional Development Strategy

- 2.1 The regional policy context is provided by the Regional Development Strategy (RDS) 2035, the Strategic Planning Policy Statement (SPPS) 2015 and regional Planning Policy Statements (PPS).
- 2.2 The RDS prepared by the Department for Regional Development (published 15th March 2012) is the spatial strategy for the Executive and provides an overarching strategic planning framework to facilitate and guide the public and private sectors. The RDS was prepared under the Strategic Planning (Northern Ireland) Order 1999. The RDS emphasises the importance of the relationship between the location of housing, jobs, facilities, services and infrastructure and must be taken into account when preparing a local development plan.
- 2.3 The RDS provides strategic guidance through Regional Guidance (RG) and Spatial Framework Guidance (SFG) under the 3 sustainable development themes of the Economy, Society and Environment.
- 2.4 Strategic Guidance Framework (SFG) 1 specifically recognises the important role of Belfast on the Eastern economic corridor as a regional gateway to promote urban economic growth. Belfast has a key role as the centre of regional administration and providing business services. The strategic guidance also recognises Lisburn city and the town centres of Bangor and Carrickfergus within neighbouring authorities as key locations for urban economic development.
- 2.5 SFG 3 specifically recognises the need to support and strengthen the role of Belfast city centre as the primary retail location in Northern Ireland, complemented by a precautionary approach to out of centre commercial developments, such as Boucher Retail Park, due to the likely risk of an adverse impact upon the city centre.
- 2.6 This guidance also specially states that the city centre will continue as the primary office location in Northern Ireland and the first choice for office developments. It also highlights Belfast city centre as the regional focus of cultural amenities and highlights that public realm can have significant impacts upon investment in new business.
- 2.7 SFG 2 of the RDS seeks to grow the population of the city by providing a wide variety of additional dwelling types complemented with employment opportunities, efficient transportation infrastructure, leisure activities and relevant services.

Strategic Planning Policy Statement (SPPS) 'Planning for Sustainable Development'

- 2.8 The Department of the Environment's 'Strategic Planning Policy Statement for Northern Ireland' - Planning for Sustainable Development (SPPS), was published in final form on

22nd September 2015. This publication consolidates over twenty separate publications into one document under the reformed two-tier planning system. The provisions of the SPPS must be taken into account in the preparation of Local Development Plans, and are also material to all decisions on individual planning applications and appeals.

- 2.9 The underlying message of the SPPS is to promote sustainable development through the integration and balancing of economic, social and environmental factors. This document facilitates economic growth through large scale investment and job creation by improving competitiveness and building a larger and more export driven private sector and aims to promote well-being and a shared society through delivery of homes, investment in physical regeneration and promoting good design in the built environment.
- 2.10 In relation to retailing, this policy aims to support and sustain vibrant centres through Local Development Plans (LDPs) and decision making by adopting a town centres first approach to retailing and other relevant uses (including cultural and community facilities, leisure, entertainment and businesses); protecting and enhancing diversity appropriate to function, such as leisure, cultural facilities and housing and promoting good quality design and accessibility. The SPPS states that LDPs should define a network/hierarchy of centres, define the spatial extent of town centres, set appropriate policies, provide a diverse offering and allocate sites. The SPPS also introduces the 'call for sites' which invites landlords to bring forward sites and in the absence of a current and up-to-date LDP to prepare an assessment of need. Belfast LDP preparation will also be informed by taking account of the wide range of existing strategies such as the Belfast city centre Regeneration and Investment Strategy (BCCRIS) to assess need and capacity of the health of our City centre in preparation of a retail strategy to allocate and use sites.
- 2.11 In relation to economic development and commerce, the SPPS states that in larger settlements appropriate proposals for Class B1 business uses (offices, call centres and research and development) should be permitted if located within city or town centres, and in other locations that may be specified for such use in a LDP, such as a district or local centre. The SPPS also reiterates the role of the LDPs to ensure that there is an ample supply of suitable land available to meet economic development needs, on a range and choice of sites in terms of size and location to promote flexibility and that LDPs should seek to identify previously developed land for economic development.

Local Policy Context

Belfast Urban Area Plan (BUAP) 2001

- 2.12 The current development plan for the majority of the Belfast district is the Belfast Urban Area Plan (BUAP) 2001, which was adopted in December 1989. The area covered by the Plan included the whole of the administrative area of the former Belfast City Council area, together with the urban parts of the former District Council areas of Castlereagh, Lisburn and Newtownabbey as well as Greenisland and Holywood.
- 2.13 The purpose of the BUAP was to establish physical development policies for this broad urban area up to 2001, clarifying the extent and location of development and providing a

framework for public and private agencies in their investment decisions relating to land use.

- 2.14 Belfast Urban Area Plan (BUAP) 2001 included designation of 940 acres of zoned land to meet the expansion needs of existing industry and commerce and to provide for new businesses. Land and premises suitable for new, relocating and expanding enterprises were identified in the inner city and other accessible locations.
- 2.15 The BUAP included Belfast city centre development as the major centre for regional and city centre development and for leisure and tourism. Retail policies focused on Donegall Place/Royal Avenue as the leading shopping centre of the Belfast Urban Area (BUA) and renewal by major development on Laganside and Northside. The plan also concentrated on environmental improvements to the landscape, open space schemes, for pedestrians and traffic management measures through improved public transport and convenient car parking.
- 2.16 The city centre shopping strategy concentrated around Donegall Place/Royal Avenue allowing small scale shopping development up to 2500sq. metres gross floor space in shopping frontages in the remainder of the city centre. In the rest of the BUA new shopping schemes and retail warehouses were to be located in or near existing shopping centres and not normally exceed 2500sq. metres gross floor space except in areas under shopped. Large retail park development in off-centre locations was not normally considered appropriate to the scale of NI. Daily shopping needs in areas of deficient will be met by permitting the development of local shops.
- 2.17 The BUAP also included policies for the riverside lands of the Gasworks, Ravenhill, Maysfield, Laganbank, Oxford Street/Victoria St, Donegal Quay, Corporation Square/Clarendon Dock and Abercorn Basin as key sites along the river and its waterfront as a major landscape feature.
- 2.18 The BUA office strategy and policies was to concentrate new office development in the city centre. The development of clusters of new small offices were encouraged in Northside and Laganside and refurbishment of obsolescent commercial accommodation in city centre conservation areas for office use will be encouraged as a priority. The BMA office strategy promotes Belfast city centre as the primary location for office development in order to reinforce the role of Belfast as the regional city. PPS4 clarifies B1 Business use as Class B1 (a) office (b) call centre and (c) research and development.

Draft Belfast Metropolitan Area Plan 2015 (dBMAP)

- 2.19 DBMAP 2015 was published by the Department for Environment (DOE) in September 2014. It is a joint plan covering the original City Council areas of Belfast and Lisburn and the Borough Council areas of Carrickfergus, Castlereagh, Newtownabbey and North Down. Although its boundaries no longer match the new 11 Council districts established as part of the reform of local government, the whole of the new Belfast City Council area falls within its remit.

- 2.20 Although formally adopted in 2014, this process of final BMAP adoption was declared unlawful as a result of a judgement in the court of appeal delivered on 18 May 2017. This means the Belfast Urban Area Plan (BUAP) 2001 and the other Development Plans provides the statutory plan context for the area. However, BUAP was published in 1990, nearly 30 years ago. The Belfast City Council Plan Area has undergone massive transformation since then, particularly in the city centre. The formal development plans which apply are dated and silent on many of the planning issues pertinent to needs of current planning decision making. In recognition of this unique circumstance and taking account of the short term transitional period in advance of the adoption of the Local Policies Plan it is important to provide clarity in relation to the application of planning policy.
- 2.21 Draft BMAP, in its most recent, post-examination form remains a significant material consideration in future planning decisions. It was at the most advanced stage possible prior to formal adoption. Draft BMAP referred to throughout this document therefore refers to that version. However, in preparing this document the council has also had regard to the provisions of the draft BMAP which was published in 2004, the objections which were raised as part of the plan process and the Planning Appeals Commission Inquiry report.
- 2.22 The SPPS's transitional arrangements provide for continuity until such times as a new LDP for the whole of their council area is adopted to ensure continuity in planning policy for taking planning decisions.
- 2.23 BUAP contains less zonings or designations than draft BMAP and delineates a city centre boundary which has expanded significantly since then by virtue of the application of Draft BMAP. The council therefore intends to use a number of the existing designations contained in the draft BMAP, insofar as it relates to the Belfast City Council Plan Area, to form the basis of decision making until the LDP is adopted in its entirety.
- 2.24 The BMA Retail Strategy promotes Belfast city centre as the leading shopping Centre in the Plan Area and Northern Ireland which is enhanced further through policy R3 which states that planning permission will not be granted for proposals for retail development where it would be likely to result in an adverse impact on the distinctive role of Belfast city centre as the leading regional shopping Centre. In addition the retail strategy states that outside the city and town centres the nature and scale of retail development is to be controlled in order to protect the vitality and viability of the city and town centres. Central to this strategy are a set of outcomes to which land use planning can aim to facilitate:-
- A regional centre with a vitality, urban form and range of activities appropriate to a European regional capital
 - An accessible, dynamic, 24 hour city centre
 - A high quality urban living environment
 - A centre of culture and protected heritage
 - Within Belfast city centre, draft BMAP sets out the following:-

- Designation of a city centre boundary
- Designation of a primary retail core and primary retail frontage
- Designation of a main office area

2.25 The following designations were outlined in dBMAP:

Belfast Primary Retail Core

2.26 The Primary Retail Core (PRC) is based around Donegall Place/Royal Avenue retail spine. The boundary is designated to ensure continuance of a compact and attractive shopping environment, offering choice and convenience. It extends westwards towards Millfield/College Avenue/College Square East and eastwards towards Donegall Street/Bridge Street/Church Lane/Victoria Street. The boundary also encompasses areas immediately to the west and east of the City Hall and contains a civic precinct around city hall and civic axis based on Wellington Place, Chichester Street and Donegall Square. Policy R1 of dBMAP states that planning permission will only be granted for non-retail uses at ground floor where it is not located in a primary frontage; there is no significant loss of retail floor space at ground floor, would be create a cluster not predominance of non-retail. DBMAP also states that outside PRC retail development would only be granted where it is demonstrated that there is no suitable site.

Belfast Primary Retail Frontage

2.27 The Primary Retail Frontage encompasses Donegall square North, Donegall Place, Royal Avenue (between Castle Place and North Street), Castle Place, Castle Lane, Corn Market and William Street South. It is where the greatest concentration of retail uses is found. Policy R2 dBMAP stated that planning permission will not be granted for non-retail uses at ground floor level within PRF. This policy goes further to state that bars, cafes and restaurants will be expected to locate on secondary frontages only exceptionally where there are part of a mixed use retail led development which contributes to the vitality and viability.

2.28 DBMAP states the following in relation to the city centre

- Retail within the Primary Retail Core and Frontage as above
- Recognition that the city centre is the first choice for major office development
- Designation of 9 character areas
- Zoning of 78 development opportunity sites
- Accommodating living within the city centre through protection of existing housing areas and zoning new areas to create day and night vitality
- Proposed 2 new rail/halt stations, area of parking restraint, 2 pedestrian/cycle bridge crossing
- Designation of 4 local landscape policy areas, an area of townscape character, historic park garden and demesne of special historic interest

Other non-statutory documents

Belfast City centre Regeneration and Investment Strategy

- 2.29 This Strategy sets out Belfast City Council's ambition for continued growth and regeneration of the city core to 2030 and contains policies to guide decision making and key projects to drive economic growth and deliver social benefits.
- 2.30 The principles of this strategy include increasing the employment and residential population; managing retail; maximising tourism; creating a learning and innovation centre and a green centre; and city connectivity, shared space and social impact.
- 2.31 The Strategy also identified five special action areas within the city centre which have been progressed through masterplans implemented by the Council.
- 2.32 Weavers Cross comprises 8ha is located on the site of the Great Victoria Street train Station and Europa bus station as a transport led regeneration project including offices and amenity space expected to be completed in 2022.
- 2.33 The Inner North West masterplan includes 42.4ha north of the primary retail pitch, highlights opportunities for mixed use development anchored by the Ulster University campus, refurbishment of the Smithfield Market, redevelopment Belfast Central Library and redevelopment of the former Belfast Telegraph building for which the council has submitted a pre-application notice for £75m commercial space with cafes and restaurants. Consultation on the masterplan opened in 13th February 2018 and closed on 8th May 2018 with further consultation on the Strategic environmental assessment and Habitats Regulation Assessment until October 2018.
- 2.34 The East bank development strategy comprises 43 acres of riverside frontage from SSE Arena to Sirocco Works coordinating key sites through the highway network and integrated urban design and place-making. Consultation on the draft proposals took place in Summer 2017 with further consultation on the Strategic Environmental Assessment and Habitats Regulation Assessment between February 2017 and May 2017. Major development sites and areas such as Queens Quay, Odyssey Quay and Sirocco Quays have progressed.
- 2.35 The Gasworks Northern Fringe draft masterplan comprises proposed housing, commercial and leisure uses. Consultation closed on 31st Jan 2018.
- 2.36 The last special area included the redevelopment of Castlecourt shopping centre, in 2017 following a change of ownership further capital expenditure was to be planned for the complex.
- 2.37 The City centre Investment Fund was set up to support the regeneration initiatives of BCRIS. As an off shoot Belfast City Council launched an initiative to support Grade A office accommodation through funding.

- 2.38 The City Growth Deal was launched in November 2016 focusing on regeneration and place-making, skills and employment, transport integration and financing and it is expected to be agreed in Autumn 2018.

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

- 2.39 The Corporate Plan reiterates many of the desired outcomes and priorities expressed in the Belfast Agenda. The corporate improvement plan agrees improvement objectives represented by key external ambitions for the city.

Linen Quarter Vision and Guidance

- 2.40 This guidance document was adopted by the Council on the 1st June 2016. The key objective of this document is to establish the conditions and delivery mechanisms to protect the heritage of the area while ensuring that the office sector continues to grow and flourish. The guidance contains proposals to increase the commercial and financial viability of new developments to include the reuse of existing buildings, design guidance and public realm proposals. Recent office development within this location includes facilities on Bedford Street, Adelaide Street and Great Victoria Street as the demand for 'Grade A' office accommodation has grown.

Community Plan (Belfast Agenda)

- 2.41 There is a statutory obligation for the evolving Local Development Plan to take account of the Community Plan known in Belfast city as the Belfast Agenda.
- 2.42 The Council took on responsibility for community planning in 2015 as a result of local government reform. It is a process whereby councils, statutory bodies and communities themselves work together in partnership to develop and implement a shared vision for their area, to make sure that public services work together with communities to deliver real improvements for local people. The plan sets out a joint vision and long-term ambitions for Belfast's future, as well as outlining priorities for action over the next four years.
- 2.43 The vision for Belfast in 2035 set out in the Belfast Agenda is:
“Belfast will be a city re-imagined and resurgent. A great place to live and work for everyone. Beautiful, well connected and culturally vibrant, it will be a sustainable city shared and loved by all its citizens, free from the legacy of conflict. A compassionate city offering opportunities for everyone. A confident and successful city energising a dynamic and prosperous city region. A magnet for talent and business and admired around the world. A city people dream to visit.”
- 2.44 Delivery of this vision is based on a number of strategic outcomes, together with four bold ambitions to be achieved by 2035. The LDP is recognised within the Belfast Agenda as one of the key tools available to shape the physical future of Belfast in an integrated, sustainable approach to economic growth and investment. Retail growth and a strong city core are described as one of several immediate priorities, under the theme of

Growing the Economy and City Development, where it explains that the LDP will be vital to the delivery of the outcomes in the Belfast Agenda.

- 2.45 Councils must take account of their current Community Plan when preparing a Local Development Plan (LDP). The LDP will provide a spatial expression to the community plan, thereby linking public and private sector investment through the land use planning system.
- 2.46 The agenda was published on the 30th November 2017 outlining a long term strategic framework for improving the economic, social and environmental wellbeing of the city up to 2035. By 2021 it aims to grow the economy through new jobs, foreign direct investment, business start-ups, tourism and a city deal. Alongside city development to grow the city's rates base by 5% through residential and commercial developments, create 1.5m sqft Grade A offices, create 3,000 hotel bed spaces and increase city living satisfaction. The Belfast Agenda puts forward indicators to track progress over time such as investment into Belfast, city competitiveness, number of businesses and business start-ups in relation to a thriving and prosperous economy.

Assessing Employment Space Requirements across the City 2015-2030

- 2.47 This economic research paper by Ulster University Economic Policy Centre, September 2016 was prepared for the preparation of the Preferred Options Paper (POP). It estimated future floor space 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 floor space applied to all A1 uses (convenience goods, comparison goods, retail services) and amounted to 68,000 net sq. metres by the year 2030 based on an upper growth scenario.
- 2.48 This research stated that 12 per cent 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.

Local Development Plan Preferred Options Paper and Public consultation report

- 2.49 The Preferred Options Paper (POP) was published on 26 January 2017 and was open for consultation until 20 April 2017. The POP outlined the vision, objectives and key planning issues affecting the city; possible options on how to deliver new development and planned growth, and what our preferred options are and the rationale for that preference.
- 2.50 This document 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.
- 2.51 There was strong support for the 'city centre first' approach applied to development and job creation, and to strengthen Belfast's role as the regional economic driver. However,

this was balanced with the need to distribute employment opportunities in areas of high unemployment and areas of multiple deprivation.

- 2.52 There was also strong support given to the preferred 'network of centres' to promote fairness across the city and provide communities with local services. Again, balanced with respondents who preferred the approach which enables the city centre to be a vibrant hub.
- 2.53 There was broad recognition that retailing has evolved through online shopping and customers seek shopping destinations and retail experiences. The majority of respondents were supportive of managing uses in centres to provide diversity alongside flexibility to support complementary uses such as cafes, restaurants and niche shopping to adapt to emerging trends and reduce vacancy.

Urban Villages 2016

- 2.54 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 floor space efficiency.
- 2.55 The West Belfast Strategic Framework 2016 is relevant to this Study insofar as its identification of the Dairy Farm District centre and adjacent area as a new "Town Centre" for the Poleglass, Twinbrook, Lagmore and Kilwee neighbourhoods.
- 2.56 The South Belfast Strategic Framework 2016 recognises the challenges faced by shops in Sandy row, Donegall Pass and the Markets 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.

Business Improvement Districts

- 2.57 There are two Business Improvement Districts (BIDs) within the city centre. The 'Belfast One' BID covers the majority of the retail core from City Hall northwards towards Gresham Street and bounded by Millfield and Victoria Street. 'Belfast One' BID was officially declared on the 30th of October 2015. Its overriding aim is to enhance business activity and increase attractiveness through collaborative working.
- 2.58 'Destination CQ' BID includes the Cathedral Quarter Core, the main area for evening economy with bars/restaurants extending towards North St/Queen St to the south-east, main transport link A12/M3 and Oxford Street to the west. 'Destination CQ' BID was officially launched on 11th October 2016 as a destination for tourism, culture, creativity, innovation and business.

- 2.59 A third BID within BT2 comprising large offices, restaurants, bars, hotels and independent retailers was secured on the 27th October 2017 and a fourth BID may emerge along the Lisburn Road if this is supported.

3.0 Recent Studies

- 3.1 The LDP is required to ensure that its town centre and retail strategy is based upon a robust and reliable evidence base to justify its policies and proposals. As part of the production of an LDP councils must undertake an assessment of need or capacity for retail and other main centre uses alongside regular health checks to ensure that any information remains relevant and up to date. Preferred option VE5 of the POP sets out the general approach to be used when directing future development based on a network and hierarchy of centres. As such it helped to promote the city centre first, complemented by a precautionary approach to out of centre commercial development as set out in the RDS and SPPS. This approach is particularly important to acknowledge the role of Belfast on the Eastern economic corridor as a regional gateway to promote urban economic growth. Health checks comprise a number of indicators such as vacancy and diversity of use which can be utilised to establish trends and as evidence to progress particular policy direction for the LDP. Preferred Option VE7 aimed to positively support the vitality and viability of centres to maintain diversity of use and retailer representation which would further support and strengthen the role of Belfast city centre as the primary retail location in Northern Ireland as per the RDS.

Urban Capacity Study

- 3.2 The Urban Capacity Study involves an assessment of the potential for future housing and employment growth within the urban footprint, including the capacity for different types and densities of housing and the capacity for business accommodation and employment land over the plan period. This is based on the ambitious level of economic growth – projecting the creation of c. 46,000 additional jobs over the plan period. For the purposes of this study the district was broken into 5 character areas of which the city centre is one. The study identified sites to be assessed, their viability, the most appropriate use and indicative trajectory of development. In regard to potential changes of land use, it is noted that the study identifies over 1.1m sq. metres of employment land available which rises to 1.9m sq. metres if all mixed use housing/employment sites are used for employment use.

Retail and Leisure Capacity Study

- 3.3 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.

Shopping patterns survey

- 3.4 As part of the Retail and Leisure Capacity Study a shopping patterns survey was conducted. The main finding included that Tesco is the largest grocery shop 43 per cent market share with Tesco, Castlereagh the main destination for shopping in a phone survey of 500 of Belfast shoppers. Of the ten main destinations for shopping Tesco, Yorkgate, Asda Westwood and Sainsbury Kennedy Centre were the only situated within

an existing district/local centre. Nearly 70 per cent of shoppers stated convenience as the main reason for shopping at a particular location. The three main grocery stores (Tesco, Asda and Sainsbury) also accounted for two-thirds of the grocery market of the shoppers surveyed.

- 3.5 Belfast most popular destination for comparison shopping for 60 per cent persons surveyed, followed by online, Forestside, Abbeycentre and Boucher Road. Boucher Road is the principle shopping destination for bulky goods. The convenience of the location was the primary reason for choosing to shop at a particular location followed by the range of goods available. This may explain the popularity of the out of centre locations listed above.
- 3.6 When shopping for comparison goods approximately half of shoppers go for something to eat which may explain the rise of retail services in the form of cafes, restaurants and leisure services. Most people were satisfied with the shopping facilities in Belfast and when asked how the city centre could be improved more shops featured prominently.

4.0 Draft Plan Strategy Policy Approaches

Retail requirements

- 4.1 The promotion of retail and leisure development comprises only one strand of a multi-faced approach to include offices, tourism, educational and residential development in the city centre. It is also allied to environmental improvements and public realm enhancements.

Retail Hierarchy

- 4.2 Regional strategic policy contained within the SPPS states that the LDP should define a network and hierarchy of centres- town, district and local centre. It also states that it should ensure that that development proposals for retail development are considered in the following order of merit:-
- City centre Primary Retail core and frontage;
 - City centre;
 - District centre; and
 - Local
- 4.3 The city centre being at the top of hierarchy must therefore be the main focus for significant new retail investment.
- 4.4 However, it is well documented that traditional high street retailing is suffering a decline. At a macro level the uncertainty surrounding Brexit, a rise in interest rates and the rise of online shopping are all having a negative impact. In particular on-line shopping is rapidly changing the retailing landscape. Seeking to adapt to changes in consumer trends landlords are also becoming increasingly aware of the need to create a positive physical shopping experience, and the expansion of leisure within a retailing environment has been an important development in traditional retail locations.
- 4.5 Background evidence in the Retail and Leisure Capacity study indicates capacity for further development over the plan period (approx. 10,000 net sq. metres capacity for additional convenience goods floor space and approx. 50,000 net sq. metres capacity for additional comparison goods floor space in Belfast over the plan period excluding the extant permissions. Any projected increase in retail should be directed to the Belfast city centre to protect its role and primacy within the region.
- 4.6 The outlook in the short-term looks promising as the city centre continues to be the main focus for new retail entrants and a supply/demand imbalance in prime locations is maintaining upward pressure on rents. Research suggests there are numerous unsatisfied occupier requirements for Belfast city centre in the 5,000 – 10,000 sq ft size bracket which will require redevelopment or reconfiguration by landlords due to the lack of suitable sized floor plates on prime and secondary pitches¹.

¹ Savills Research NI Market January 2018

- 4.7 Whilst the policy direction is largely dictated by the SPPS in terms of setting out the retail hierarchy it would be most useful to clarify the order of preference as the basis for ensuring the delivery of a vibrant city centre and a vibrant surrounding network of district and local centres.

Out of Centre Development

- 4.8 Belfast city centre has over the past numbers of years faced continuing competition from retail development in out of centre locations such as Sprucefield Shopping Centre and Boucher Retail Park. As shopping patterns are ever evolving there is a need to maintain the economic strength of the city centre by protecting it from out of town / centre developments. 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 so much so that planning applications for out-of-town developments have been five times greater than those for in-town². 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.
- 4.9 One of the barometers for measuring how well the high street is performing is footfall. Across the UK footfall declined by -1.5% in Quarter two 2018, an improvement on the drop of -3.0% in the previous quarter³. In term of Belfast, footfall within the PRC in June 2017 totalled 2.8 million visitors, a 5% decrease from the previous year. Cornmarket and Donegall Place recorded the highest pedestrian counts similar to previous studies, alongside Ann Street. Donegall Place recorded a 13 per cent decrease on the previous year however despite this, footfall levels are considerably higher than 2 years ago. Whilst many factors impact footfall levels including wage stagnation, weather and the cost of rates, there is no doubt that out of centre development is contributing to the gradual decline of the city centre and the network of centres within Belfast.
- 4.10 Greater clarity is needed around out of centre development to limit the amount of trade drawing away from the city centre. The policy on out of centre development seeks to put forward a rationale for assessing such proposals. English national policy requires those promoting development, where it is argued that no other sequentially preferable sites are appropriate, to demonstrate why such sites are not practical alternatives in terms of their “availability, suitability and viability”. As the SPPS does not clarify or define the sequential test there is a need for a policy to adopt the English policy approach so there is a clear rationale to assessment for proposal of out of centre development.

² The Grimsey Review 2

³ Springboard UK Q2 2018 Footfall Review

District centres, local centres and city corridors

- 4.11 District and local centres have provided a local resource and focal point for the communities they serve for generations. As well as providing shopping opportunities, District and Local centres also supply other supporting services and facilities to meet the needs of residents and visitors alike.

District centre	2016	2017
Park Centre	17%	25%
Kennedy Centre	2%	2%
Dairy Farm	15%	4%
Connswater	22%	21%
Westwood	89%	75%
City Side	19%	17%
Hillview	100%	100%
Local centre	2016	2017
Kingsway	14%	13%
Kings Square	5%	0%

FIGURE 1: VACANCY RATE DISTRICT CENTRES AND LOCAL CENTRES

- 4.12 It is a mixed picture in terms of performance of the five district centres. Connswater shopping centre is devoid of a food retailer and vacancy is 21 per cent or 14 units, however it has recently attracted 'The Range' retailer. Lidl has assumed a convenience role in the adjoining retail park. Dairy Farm maintains Supervalu as a food anchor with only one vacant unit. The majority of the units are a mix of non-retail use. A new town centre has been approved encompassing this district site. Park centre no longer comprises a food anchor and comprises a high vacancy rate with 10 unoccupied units. Westwood comprises an ASDA as its main food anchor with planning permission for an extension of approx. 5,153 gross sq. metres on adjoining land alongside 18 comparison goods units. The Kennedy Centre contains a Sainsbury's as its main food anchor and associated petrol station, foodcourt, cinema and 800 parking spaces. There was only one vacant unit when surveyed Summer 2017. Cityside comprises a Tesco as its main grocery anchor and Adsa Living store alongside a cinema and 35 commercial units. Six units were vacant in Summer 2017 which at 17 per cent is average for Belfast as a whole. In Summer 2017 Hillview District centre was completely vacant of commercial activity. It has recently obtained planning permission for a car show room, drive-thru restaurant/café and freestanding units.

- 4.13 It is clear from the above analysis that some district centres are performing well whilst others are underperforming. The district centres rely on convenience goods and therefore this role ought to be strengthened to bolster trading. District centres should therefore be the first choice for retail outside out Belfast city centre.
- 4.14 A local centre is the next step down in the retail hierarchy, offering a smaller range of facilities than those present in a District centre. Nonetheless they play an equally important role in meeting the day-to-day shopping needs for the community, particularly the less mobile and elderly.
- 4.15 Kingsway local centre comprises a Spar as its main food retailer, butchers, bakers and numerous leisure services including salons, beauticians, cafes and churches. In summer 2017 13 per cent of the units were vacant, below the average for Belfast. Kings Square local centre comprises a Supervalu and Co-op as main food retailers and numerous other A1 retailers. In Summer 2017 there were no vacant units.
- 4.16 Moving forward consideration should be given to restricting the size of units within local centres (500 sq metres for convenience) and 200 sq metres of convenience. This would ensure proposals for larger stores would be directed to the city centre or district centres thus protecting the overall retail hierarchy whilst allowing for tempered growth of local centres.
- 4.17 In addition to the district centres and local centres there are 18 arterial routes. On the designated arterial routes there are both identified commercial nodes and shopping / commercial areas. The majority of the Arterial routes have vacancy rates below or comparable to the overall vacancy rate of Belfast District. Of those Arterial routes with the lowest vacancy rates, the predominant land use are leisure services. Retail Services are the predominant land use along Lisburn and Holywood Roads. There is scope as the LPP stage of the LDP to consider the rationalisation of a number of these commercial areas / shopping areas into local centres to create a better and more sustainable centre hierarchy building upon the SPPS and draft Policy RET 1.

Retail warehousing

- 4.18 Retailing warehousing, which is defined, as large single-level individual store with a minimum of 1000 square metres gross retail floor space normally selling goods such as DIY goods, furniture, electrical goods, carpets and gardening goods, with car parking provision.
- 4.19 The largest concentration of retailing outside the city centre and other designations is within Boucher Industrial Estate and Holywood Exchange with a footprint comparable to the PRC of Belfast (145,000 gross sq. metres). Boucher comprises a range of freestanding and grouped retail warehouses selling general comparison goods and has low vacancy rates. Holywood Exchange has a Sainsbury's, IKEA, B&Q and various other commercial retail units.

Location	2017
Boucher Crescent	7%
Hollywood Exchange	0%

FIGURE 2: VACANCY RATE - AREAS OF RETAIL WAREHOUSING

4.20 This policy on retail warehousing seeks to avoid trade diversion that could have an adverse impact upon centres within the hierarchy as the focus of retailing and other town centre uses. Strong consideration should be given to setting a number of floor space thresholds. A convenience goods size threshold of 300sq. metres net should be set based on comparable 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. It is also intended to manage the proportion of convenience goods floor space in units within retail parks that sell a mix of goods. The threshold of 700sq. metres gross floor space is the minimum size of warehouse observed for recent park proposals. This policy seeks to allow areas of retail warehousing to fulfil their roles in a manner that will complement rather than compete with the city centre.

Belfast city centre retail area

4.21 A compact and attractive shopping environment is important in that it promotes choice and convenience. Consolidating the areas with the highest representation of retail uses will help promote a more competitive retail core whilst allowing for too extensive an area, could result in fragmentation and an increase in vacancy levels in peripheral areas / frontages.

4.22 In preparing the strategy, an assessment of the health of the city and other retailing areas across the district was undertaken by Braniff Associates in September 2017 and the LDP team. The principle findings of this study outlined the health of the existing centres; a survey of shopping patterns, future outlook and comparison cities and overall capacity assessment for Belfast.

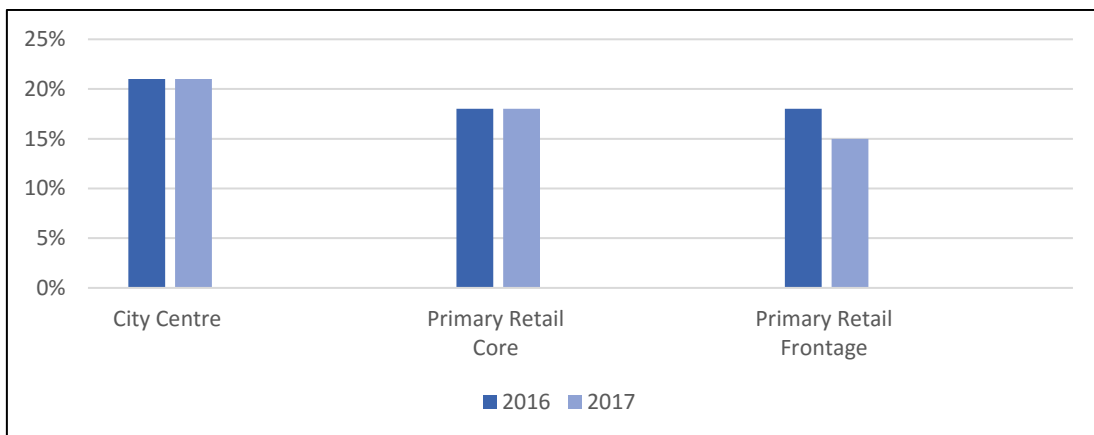


FIGURE 3: VACANCY TRENDS IN THE CITY CENTRE

- 4.23 In July 2017 within the city centre convenience goods shopping and retail services accounted for 45 per cent of the units surveyed. Leisure services, including restaurants, cafes and bars accounted for 24 per cent of the units. Vacancy was high at 2 per cent. In the Primary Retail Core (PRC) convenience shopping and retail services accounted for 58 per cent of the units surveyed, 13 per cent higher than the city centre as a whole. Leisure services accounted for 18 per cent of the units. Vacancy was lower than the city as a whole at 18 per cent. In the Primary Retail Frontage (PRF) retailing comprised 61 per cent of the units surveyed, 3 per cent higher than the retail core and leisure services accounted for 12 per cent of the units. Vacancy was lower again at 15 per cent
- 4.24 Experian GOAD retail property intelligence breakdown of floor space within the PRC and adjacent areas highlighted 116,551 net sq. metres of retail use approximately 57 per cent of the total floor space. Leisure services accounted for 43,835sq. metres of floor space whilst financial and business services totalled 13,698sq. metres floor space. Vacant floor space totalled 29,602 net sq. metres.
- 4.25 In relation to UK average of 32 per cent comparison shopping comprising 36 per cent of the total units within the GOAD area appears healthy and convenience shopping totalling 7 per cent is similar to that of 9 per cent within the UK.
- 4.26 However in comparison with the UK vacancy of 11 per cent of units, Belfast city centre rate stands high at 18 per cent. Clusters of vacancy are situated around Fountain Street and Queen Street although occupancy has improved along Ann Street in comparison to previous years.
- 4.27 The changing dynamics of the high street is well documented. Most stark is the relentless decline of traditional shops selling comparison goods, products that can often more conveniently be bought online – bulky white goods, electronics, books and increasingly, fashion and footwear. These traditional anchors of many town centres such as banks have been closing and where these shops have been taken over, they are being filled by retail services – nail salons, tattoo studio and barbers, a trend that has been clearly recognisable in Belfast city centre.
- 4.28 Future policy needs to enhance the diversity and quality of the offering in the city. This can be achieved by managing the retail and non-retail uses on a percentage split. Such a move would provide flexibility to supplement retailing provision with leisure, hospitality and entertainment and to make Belfast city centre more adaptive to changing consumer behaviour and increasing resiliency to changing market dynamics.

Temporary and meanwhile uses

- 4.29 The city centre has over the past two decades been enhanced with new retail developments Castle Court and Victoria Square that has helped to increase footfall and improve vitality. The city centre provides an important cultural destination for communities and visitors. It provides goods and services which are essential for people to live and work and for businesses to prosper and be successful. However the recent

financial crisis has led to store closures, such as BHS, HMV, Jaeger, and Poundworld, within the city centre. Difficult trading conditions have been compounded by significant changes to shopping habits over recent years due to e-retailing, home deliveries, “click & collect”, the dominance of supermarkets in the convenience goods sector selling comparison goods, and out of town shopping facilities with free parking, that are diversifying their offer with increased leisure services. These changes in shopping habits have led to the increased level of vacant shops and retail floor space.

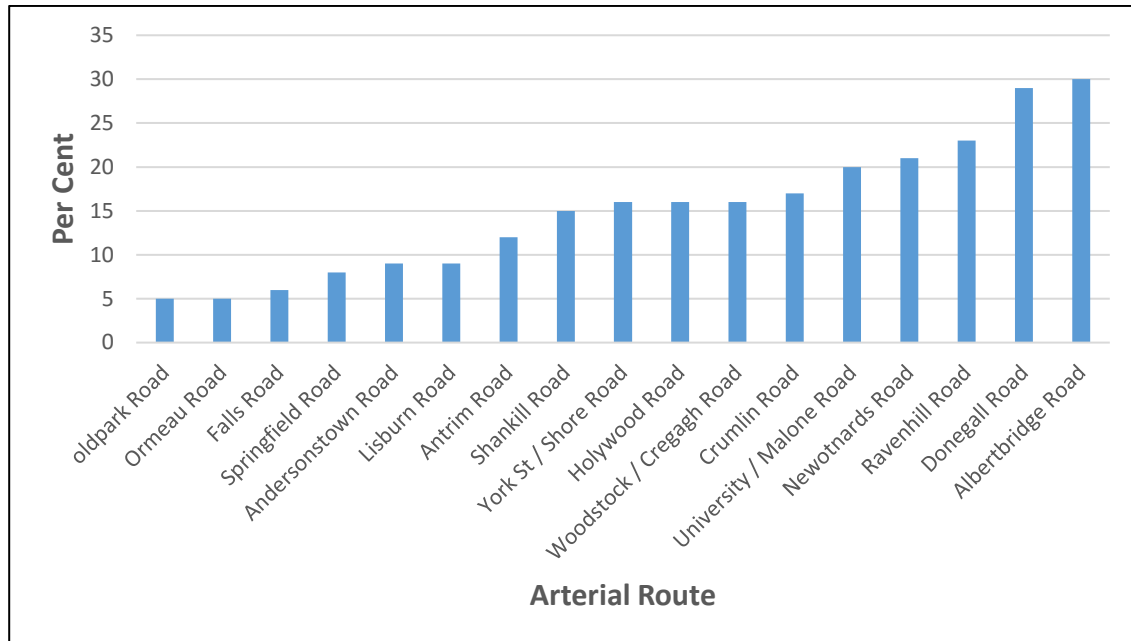


FIGURE 4: PERCENTAGE VACANCY FOR ARTERIAL ROUTES

- 4.30 The Mary Portas Review in 2011, analysed the problems facing town centres and suggested the possible policy solution of “meanwhile uses” or “Pop-Up” to promote imaginative use of empty properties; to help reduce the level of retail floor space vacancies, and minimise the poor appearance of boarded up, or blank facades that compromise the vitality of the city centre and district / local centres. Meanwhile use is described as the temporary use of vacant building or site for a short period of time, until it can be brought back into permanent commercial use. It makes practical use of the ‘pauses in the property market’, in providing the space for uses that can contribute to the economic, social and cultural vitality of the area, whilst the search for a permanent commercial use is ongoing. Likewise the MAG - Ministerial Advisory Group Meanwhile Uses Position Paper 2014 also supports the concept of meanwhile uses to help revive the Town Centres, recognising the opportunities for encouraging new activity in vacant buildings and spaces to regenerate the urban area. The Centre for Economics and Business Research estimated that the pop-up retail sector generated over £2.3 billion in revenue in the year up to June 2015, up from the £2.1 billion recorded in the year to June 2014, increasing its share of the total UK retail market to 0.76 per cent⁴.

⁴ Britain’s Pop-Up Retail Economy 2015, Blurring the lines between pop-up and traditional retail A report by the Centre for Economics and Business Research August 2015 <https://ee.co.uk/content/dam/everything-everywhere/documents/Pop-Up%20Economy%202015.pdf>

- 4.31 There have been previous short term mean while uses or pop ups in Belfast in recent years.
- Refound – upcycling collective
 - Home –temporary 50 seater restaurant opened in 2011. It subsequently reopened on a permanent basis in Wellington Place, Belfast
 - The Dock – meanwhile use of empty unit at Arc 1 in Titanic Quarter
 - The vacant Northern Bank ‘Four Corners’ - occasional theatre performances.
 - ‘We Make’ - Bedford Street, selling products from participants on the Belfast City Council’s Market Start Up Programme.
 - Second Chance Cinema - pop-up film nights and cinema weekends at various locations in Belfast
- 4.32 The opportunity to offer an empty retail space for small scale business meanwhile use, would assist start-up companies, community businesses, craft workers, or innovative incubators, who cannot afford permanent premises in the city centre. In particular, businesses that are responsive to technological and economic innovation in the marketplace could be facilitated within vacant shops, surplus public buildings and derelict land. It would provide unique experiences for the shopper or visitor, as well as encouraging economic growth. It is a useful planning tool to encourage meanwhile uses in areas undergoing regeneration where there may be a number of vacant buildings and/or listed buildings. This has the potential benefit of ensuring that buildings can be maintained in reasonable condition to avoid disrepair or dereliction. However, meanwhile uses should not be permitted to prejudice potential regeneration schemes, and should only be used as a short term measure to prevent wholesale neglect that would compromise the vitality of the city centre. Likewise mean while use should be complementary retail or leisure activity to ensure that it does not undermine the function of the commercial area.

Development Opportunity Sites

- 4.33 The city centre retail core is thriving in comparison to the city centre Fringe, which is characterised by vacant and underused brownfield sites and buildings. It has suffered from a lack of investment due to fragmented land ownership, poor quality environment, and lack of connectivity. New development in the city centre needs to expand into these areas and integrate them to the core and neighbourhoods. Planning policies to facilitate development opportunities are critical to accommodate the proposed population growth, and to strengthen the economic capacity of the city centre.
- 4.34 The draft NI Programme for Government, draft NI Industrial Strategy, the UK Industrial Strategy, and the emerging industrial programme being developed by the Belfast Regional City Deal (BRCD) partners provide clear policy frameworks that promotes investment and innovation in the growing knowledge economy and tourism sector.
-

Northern Ireland is the second fastest growing knowledge economy in the UK. 60 per cent of Northern Ireland's knowledge economy businesses are in Belfast⁵. The Belfast Region has considerable strengths and has a growing creative, knowledge and tech-based sector, with 1,646 businesses supporting total employment of 11,545 jobs⁶. In particular, UUEPC advise that there is the need to accelerate diversification of markets, to support innovation that build on key potential growth areas. NI businesses in the Knowledge Economy export almost £3bn outside the UK, with a high proportion of this sold outside of the EU.

- 4.35 The UK White Paper, Building a Britain Fit for the Future (2017) emphasises the “role of regional cities” as “motors of growth to the regional and national economy”. The Centre for Cities has highlighted the benefits of clustering economic activity. This provides businesses with opportunities for knowledge collaborations to encourage the development of cutting edge technology, good access to infrastructure and labour. UUEPC advises that the concentration of investment and jobs created is best explained by the growing tendency for Foreign Direct Investment locating in larger urban areas, especially investment in the service sectors, due to the availability of a large labour pool and the increased opportunities for firms which can arise from clustering and spill over effects. Outside London, NI is the leading UK region for attracting Foreign Direct Investment. This success has been across a range of knowledge intensive sectors. In particular Belfast is the world's top destination city for financial services technology investments⁷.
- 4.36 There is the need to plan for the structural changes due to the adoption of new technology, which has seen the emergence of mixed use innovation clusters in the post-industrial knowledge sharing economy. The Belfast Agenda is advocating the regeneration of the city centre that creates a distinctive sense of place, which is well connected and cohesive to enable Belfast to compete globally for investment and new businesses.
- 4.37 The location of the new University of Ulster Campus, the proposed Royal Exchange scheme, and the potential “Belfast Story” development in the northern city centre fringe provides a unique opportunity to plan for the creation of an innovation district. This is supported by the Council's BCCRIS intention to create regional learning and Innovation centres which includes developing a strategy for the Ulster University district to enable the creation of an innovation district. Potentially this could have a catalyst effect to regenerate the surrounding brownfield sites and refurbishment of existing vacant buildings. The integration and coordination of these major developments provide opportunities for complementary mixed use schemes comprising of commercial, residential, leisure, open spaces and tourist facilities to regenerate, connect, and expand the city centre to the outer northern boundary.

⁵ Belfast Agenda <http://www.belfastcity.gov.uk/council/Communityplanning/BelfastAgenda.aspx>

⁶ Belfast Agenda <http://www.belfastcity.gov.uk/council/Communityplanning/BelfastAgenda.aspx>

⁷ Belfast Agenda <http://www.belfastcity.gov.uk/council/Communityplanning/BelfastAgenda.aspx>

- 4.38 There is also the need to plan for the sensitive renewal of the “traditional” city centre businesses associated with finance, professional services and administration to secure the sustainability of commercial accommodation in the southern area of the city centre. The area is characterised by a mix of historic Victorian buildings and modern office buildings. Recently there have been new apartment and hotel developments, introducing a greater diversity of uses. The growth of independent and artisan retailers in Fountain Street – Castle Street provides interest and diversity for visitors and tourists. The area to the south of the city hall is defined as the Linen Conservation area due to its unique mercantile character. The BCCRIS identified the opportunity to create a prestige office district adjacent to the proposed Weavers Cross Transport Hub on Great Victoria Street. At the gateway to city centre for a projected 13 million users by 2030, there are a number of potential office sites, in Hope Street, Great Victoria Street and Ormeau Avenue. This location offers the best opportunity for a Grade A office cluster close to the traditional office core.
- 4.39 The Waterfront area is located along the River Lagan, between Odyssey Complex and the Albert Bridge, it encompasses Queen’s Quay, Sirocco and the River Lagan. The area is dominated by the strategic road network, which has severed connections between the city centre and the adjacent residential neighbourhoods. It is characterised by underused and vacant sites. There are mixed use proposal for the regeneration of the Sirocco site by a private sector developer, and Queen’s Quay master plan that would help to revitalise the waterfront area and improve accessibility between the city centre and east Belfast.
- 4.40 The Belfast City Centre Regeneration and Investment Strategy 2015 (BCCRIS)⁸ promotes the Council’s ambition to regenerate the city centre to secure socially inclusive economic growth up to 2030. The strategy is proposing to expand the employment population through the delivery of new Grade A office space, retail outlets and tourism facilities. In particular, it is proposing to address Belfast’s low level of innovation by building on the strength of existing institutions to create the Region’s learning and innovation centre, and to support the provision of flexible space for new businesses. To create a vibrant city centre, residential development is being encouraged to increase the residential population that would support the commercial offer throughout the day and evening. The intention is to create a green liveable city, with new enhanced shared open spaces, connected to high quality cycle and pedestrian routes that would connect to the adjacent neighbourhoods and city core. BCCRIS has identified five Special Action Areas, which will be given special attention;
- **Inner North** - The new Ulster University and innovation district as a creative and learning hub will be transformative to the northern part of the city centre.
 - **Inner West** - To revitalise the Castle Street / Castle Court / Smithfield Market area as a vibrant shopping district.

⁸ BCCRIS [Download the City Centre Regeneration and Investment Strategy](#)

- **North East Quarter** – Mixed use development with the introduction of anchor developments and smaller supporting uses
- **Transport Hub and South Centre** - The development of a new transport hub Weavers Cross is a major city-building opportunity and a strategic approach is required to ensure it supports wider city ambitions and its impact is fully realised.
- **Oxford Street and the Eastern Bank** - Reuniting the centre with the River Lagan requires a major reimagining of Oxford Street as a boulevard, and regenerating vacant sites to help animate the waterfront.

4.41 The Council has prepared a number of master plans and frameworks to progress the BCCRIS:-

- BCC Linen Quarter Vision and Guidance
- BCC Inner North West Master Plan Draft February 2018
- BCC East Bank Development Strategy draft 2018

4.42 The Department for Communities – Belfast Urban Regeneration Directorate has prepared a number of masterplans, and development frameworks to guide the comprehensive physical regeneration in the city centre. They provide a vision, the regeneration objectives and actions required to support the strategic physical regeneration of a particular area in the city centre.

- Department for Communities North West Quarter Master Plan 2005
- Department for Communities North East Quarter, master plan 2005
- Department for Communities Northside Urban Village regeneration
- Department for Communities Westside - Inner West Fountain Street / Castle Street 2009
- Department for Communities Queen's Quay Masterplan 2013
- Department for Communities the Greater Clarendon (Sailortown) Masterplan 2016

4.43 There are a number of overlapping master plans, prepared by the Department for Communities and the Council for different areas of the city centre. However, there is a lack of a coherent holistic regeneration approach to the proposed renewal of the city centre. An overarching strategic policy approach is required to define development opportunities for the city centre that bridges the gaps in existing policies and plans. This policy approach would also deliver the objectives contained in the Belfast Agenda, BRCD BCCRIS and the DfC masterplans. The policy objectives for the city centre would include: place shaping to define its role as an innovative 21st century city; promoting its physical renewal to adapt to structural changes in the economy; encouraging inclusive mixed use development to create a compact sustainable city centre which is attractive to investors, employees tourists, as well as supporting a quality lifestyle for residents.

Appendix A: Shopping Areas & Commercial Nodes on Arterial routes (BMAP)

Commercial Nodes on Arterial routes Bmap 2015

AR02/01 – York Road/Limestone Road

AR02/02 – Antrim Road/Limestone Road Junction

AR02/03 – Antrim Road/Crumlin Road Junction (Carlisle Circus)

AR02/04 – Crumlin Road/Oldpark Road/Agnes Street Junction

AR02/05 – Crumlin Road/Woodvale Road Junction (Ardoyne shopping centre)

AR02/06 – Shankill Road/Lanark Way Junction

AR02/07 – Shankill Road/Agnes Street/Northumberland Street Junction

AR02/08 – Falls Road/Springfield Road Junction

AR02/09 – Woodstock Road/Beersbridge Road Junction

AR02/10 – Albertbridge Road/Castlereagh Street Junction

AR02/11 – Castlereagh Road/Castlereagh Street/Beersbridge Road Junction (John Longs Corner)

AR02/12 – Albertbridge Rd/Newtownards Rd/Hollywood Rd/Uprr Newtownards Road Junction

AR02/13 – Hollywood Road/Belmont Road Junction (Gelston's Corner)

AR02/14 – Upper Newtownards Road/Sandown Road Junction (Ballyhackamore)

Shopping/Commercial Areas on Arterial routes

AR03/01 – Albertbridge Road

AR03/02 – Andersonstown Road

AR03/03 – Antrim Road

AR03/04 – Castlereagh Road

AR03/05 – Cregagh Road/Woodstock Road

AR03/06 – Crumlin Road/Oldpark Road

AR03/07 – Donegall Road

AR03/08 – Falls Road/Divis Street

AR03/09 – Grosvenor Road/Springfield Road

AR03/10 – Hollywood Road

AR03/11 – Lisburn Road

AR03/12 – Newtownards Road/Upper Newtownards Road

AR03/13 – Ormeau Road

AR04/14 – Shankill Road/Woodvale Road

AR04/15 – York Street/York Road/Shore Road

AR04/16 – Ravenhill Road

AR04/17 – Malone Road

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