POP011

Topic Paper: Belfast City Centre and Retailing

Local Development Plan 2020-2035

Belfast City Council

Executive Summary

Context

Belfast is the regional capital and major focus for administration, specialised services, commerce, cultural amenities, employment and development opportunities. It is the leading regional shopping centre and primary office location with the largest concentration of employment and commercial floor space in Northern Ireland. The City Centre is a focal point of social and economic activity and helps to define our collective sense of identity. It is at the core of the City and wider regional economy. Therefore investment focused on enhancing Belfast City Centre's economic prosperity will raise the growth of the region as a whole as customers travel further for a strong City Centre offering.

Whilst Belfast has a good representation of independent long established national and multi-national businesses and higher end aspirational retail stores, prime rates have fallen as retailers choose secondary pitches and the core has suffered vacancy.

The aims of strategic and regional policy are to support and strengthen the role of the City Centre as the primary retail location in Northern Ireland and adopting a sequential approach to development. Whilst district/local centres and commercial areas on arterial routes provide for consumers day-to-day needs, many suffer from vacancy, poor offering and neglect, with others over-trading and competing with trade in the City Centre. The new Plan must therefore ensure that future development focuses on growing and developing the success of the City Centre.

Whilst the offering of the city centre focuses on retail, there are growing demands of the City Centre to accommodate office development, particularly Grade A offices, innovation industries, the hotel and cultural industries, as well as housing a growing city.

KEY AREAS

City Centre – Potential areas at North East Quarter, Inner West area, East Bank, Great Victoria Street Transport Hub and Castlecourt
District Centres - Connswater, Park Centre, Kennedy Centre, Westwood Centre, Cityside (Yorkgate), Hillview (Crumlin Road) and Dairy Farm, Stewartstown Road
Local centres at Dunmurry, Kingsway and King's Square, Dundonald
Neighbourhood centres along arterial routes
'Belfast One' Belfast Improvement District and Destination Cathedral Quarter

<table>
<tr><th>Evidence Base</th><th>Social, Economic & Environmental Factors</th></tr>
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Regional Development Strategy 2035 (RDS) - Promote urban economic growth & Belfast City Centre as the primary retail location
Strategic Planning Policy Statement (SPPS) – adopt town centres first and sequential approach
Belfast City Centre Regeneration and Investment Strategy
Draft Linen Quarter Public Real Analysis and Vision
Profile
Belfast City Centre accounts for 75% of the rates revenue for Belfast
Largest commercial footprint (340,000sqm) & catchment in NI
217 City Centre vacant units
High dereliction rates
Competitive office rental to UK
Lack of grade A office accommodation
Prime retail rents have fallen
Growth in food and beverage units
Good representation of independently owned shops and multi-nationals
Anchor stores and high end retailers
Significant major developments & environmental improvements
Overtrading and vacancy in district centres
Forecast
Need for health checks (City Centre, District & Local Centres and Arterial Routes)
Adapting to changing retailing patterns – rise of e-commerce
Facilitating growing City Centre population – provision of housing, employment, convenience retailing, culture & leisure uses

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How can the plan encourage investment and enhance the image of Belfast as a business destination?
How can the plan promote sustainable use of lands and building? Including the historic urban fabric?
Will the plan promote compact development with good accessibility to facilities?
Will the plan make land and property available for business development?
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<tr><td>Opportunities for Growth</td></tr>
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Strengthening a City Centre core area that sustains an attractive and viable retail focus
Provision of opportunity sites for future mixed use schemes within the City Centre to include leisure, entertainment and cultural facilities to grow the evening economy
Encourage high quality, well-designed places which provide an appealing environment to which to live, visit and invest
Promotion of sustainable urban densities through tall buildings
Support district and local centres individual characters to support local needs without compromising the City Centre
Encourage connectivity, walkability and accessibility

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1.0 Introduction

Purpose of this Document

1.1 This is one of a series of 17 Topic Papers that have been put together to inform the Sustainability Appraisal Scoping Report for the Belfast Local Development Plan (LDP).

1.2 Each Topic Paper provides a summary of the evidence base required for the Sustainability Appraisal, Preferred Options Paper and Local Development Plan. They establish a baseline position and identify the key issues that need to be addressed.

1.3 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 sustainability appraisal is one of the main drivers informing the preparation of the Local Development Plan.

1.4 Each Topic Paper can be read separately but, inevitably, there are important related matters in other Topic Papers and background evidence.

Member Workshops

1.5 The Topic Papers were drafted in the early part of 2016 to provide elected members with baseline information to inform the preparation of the Local Development Plan. As such the information presented within this particular Topic Paper is intended to:

- Build the capacity of the members to make informed planning decisions, particularly within the plan making context;
- Provide baseline information which will inform Development Plan Policy making at a local level;
- Consider the commercial/retail sector within the new Belfast Local Government District;
- Assess the land use needs and opportunities for a growing commerce/retail sector within the Belfast City Council area and to consider how best to safeguard, develop and improve the City's role as the regional capital; and
- To link with important ongoing work in relation to the development of a Community Plan (the Belfast Agenda) and other strategic work being undertaken by the Council.

1.6 These papers were presented to members for discussion at a series of informal workshops with Planning Committee Members throughout Spring 2016, with key issues and opportunities for the City identified for consideration.

1.7 The original Topic Paper entitled 'Belfast City Centre and Retailing' was presented at a workshop on 21st March 2016. It has since been updated to ensure the statistics referenced are up to date for publication alongside the Preferred Options Paper.

1.8 In compiling the paper main sources of information have included Deloitte retailing study commissioned by Belfast City Council June 2015, Land and Property Services and Department of Finance and Personnel. The findings of a report by GL Hearn looking at town centres in Northern Ireland on behalf of the Department of the Environment in 2014 are also included.

1.9 This paper allows members to consider how land use policies for Belfast Council Area may be formulated within the context of the Regional Development Strategy 2035 and Regional Planning Policy the Strategic Planning Policy Statement.

1.10 Any future decision making will need to be made within the context of a Sustainability Appraisal under the provision of Planning (Northern Ireland) Act 2011. This paper is therefore intended to generate members' ideas on how planning can best meet the needs of Belfast LGD.

1.11 It is important to stress that in compiling the Topic Paper the best information available has been used, however it may need revised in light of the release of any new data. The paper will provide a foundation on which work can commence on a Preferred Options Paper as part of introducing the new Plan Strategy for Belfast City Council to replace that contained in the existing Belfast Metropolitan Area Plan.

2.0 Policy Context

Regional Policy

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). A summary of these documents as they relate to plan making and development policy is provided in the following paragraphs.

Regional Development Strategy 2035 (RDS)

2.2 The RDS 2035 provides a framework for strong sustainable economic growth across the region and recognises that a growing regional economy needs a coordinated approach to the provision of services, jobs and infrastructure. It seeks to balance the needs of a "resilient, outward looking, more dynamic economy, whilst preserving and sustaining quality of life" and promotes a sustained urban renaissance. The Strategy provides a framework within which the physical and social progress of Northern Ireland can be improved.

2.3 The RDS sets down a series of Strategic Planning Guidelines (SPGs) which have specific relevance to the Belfast Metropolitan Area (BMA). Within each of these guidelines there is planning guidance of particular relevance to the role of Belfast City Centre.

2.4 Strategic Framework Guidance within the RDS 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 Strategy also recognises Lisburn City and the town centres of Bangor and Carrickfergus as key locations for urban economic development.

2.5 Policy recognises the need to support and strengthen the role of Belfast City Centre as the primary retail location in Northern Ireland, complemented by 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 The RDS specifically states that the City Centre will continue as the primary office location in NI and the first choice for major office developments. PPS4 clarifies B1 Business use as Class B1 (a) office (b) call centre and (c) research and development. 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.

2.7 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.

2.8 Policy also enhances Belfast City Centre as the regional focus of cultural amenities and highlights that public realm can have significant impacts upon investment in new business.

Regional Planning Policy Statements

2.9 The RDS is complemented by the DOE's Planning Policy Statements, the most relevant of which is PPS 5 Retailing and Town Centres - now replaced by the Strategic Planning Policy Statement as detailed below. Planning Policy Statement 4 Planning and Economic Development (PPS 4) sets out the Department's policies for economic development uses and how growth can be accommodated in local plans. Its remit covers industrial, business and storage and distribution uses and other sui generis employment uses that do not fall into any particular use class in the Use Classes Order, such as amusement arcades and hotels. The aim of this policy is to promote sustainable development, facilitate job creation by providing a supply of land, supporting the re-use of sites and promoting mixed use development and integration of other uses such as transport.

2.10 Planning Policy Statement 12 promotes density of housing in City Centres and, likewise, policy HOU3 within BMAP favours proposals that increase housing stock in Belfast City Centre. These policies are underpinned by others within PPS1, PPS7, PPS6 and the Houses in Multiple Occupation (HMO) Subject Plan.

2.11 Due to the wide ranging and complexity of issues within the City Centre, there are other relevant policies, such as Planning Policy Statement 6 Planning, Archaeology and the Built Environment (PPS 6) in relation to the designated Conservation Areas and Listed Buildings within the City Centre, and PPS13 Transportation and Land Use policy, which recognises the importance of Belfast in the regional transport network.

Strategic Planning Policy Statement (SPPS)

2.12 The Strategic Planning Policy Statement (SPSS) was adopted in September 2015 to replace DOE PPSs as an aid to shorten and simplify the range of guidance. 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.

2.13 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 land use sites.

2.14 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 Metropolitan Area Plan 2015 (BMAP)

2.15 The Belfast Metropolitan Area Plan covers the City Council areas of Belfast and the Borough Council areas of Carrickfergus, Castlereagh, Newtownabbey, Lisburn and North Down. Within BMAP 2015 the settlement hierarchy in Belfast District consists of Belfast City and the three small settlements of Hannahstown, Edenderry and Loughview. The District Proposals designate Settlement Development Limits, zone land and designate Land Use Policy Areas in accordance with the BMA Settlement Strategy.

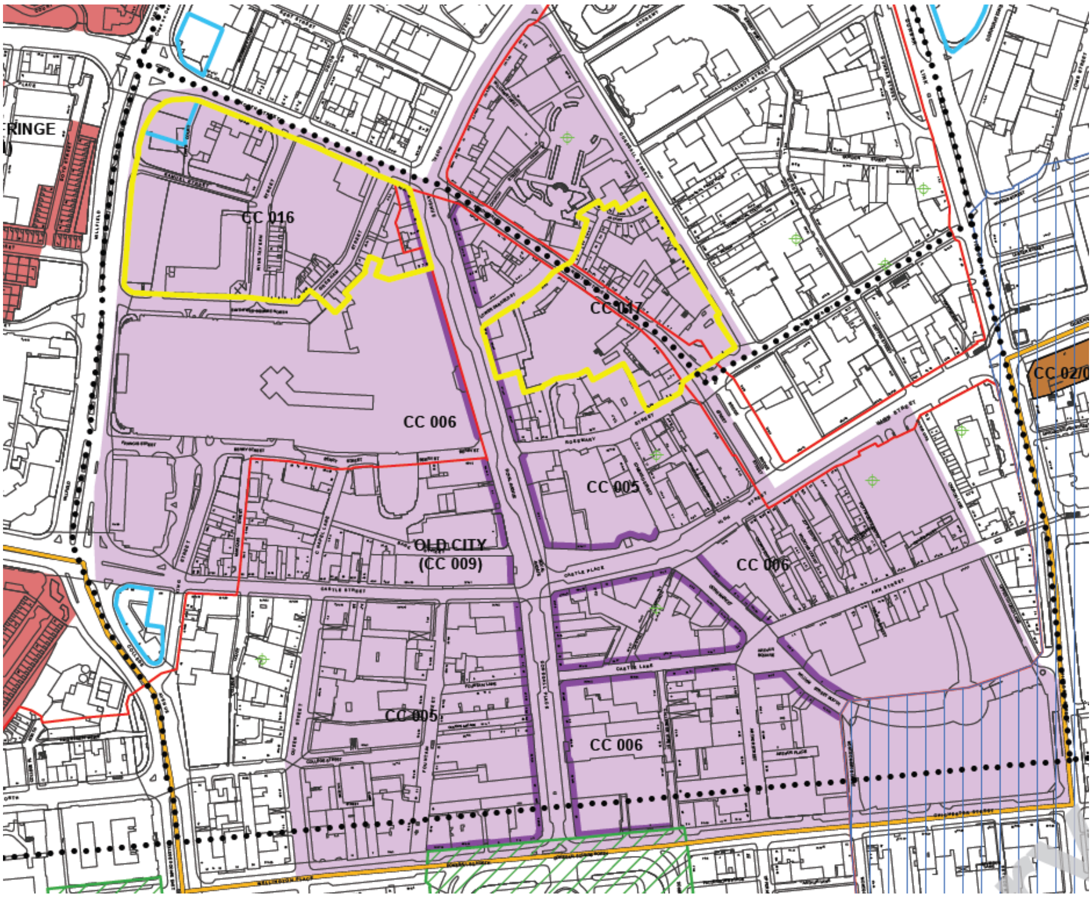
2.16 BMAP 2015 states the strategic vision for Belfast City is to promote it as the regional capital and major focus for regional administration, commerce, specialised services, cultural amenities employment and development opportunities. The BMA Retail Strategy promotes Belfast City Centre as the leading shopping centre in the plan area and in Northern Ireland. Central to this strategy are a set of outcomes to which land use planning can aim to facilitate:-

- A regional centre with vitality, urban form and range of activities appropriate to a regional capital
- An accessible dynamic and 24 hr city centre
- A high quality living environment
- A centre of culture and protected heritage

2.17 Within Belfast City Centre , BMAP sets out the following:-

- Designation of a city centre boundary
- Designation of a primary retail core and primary retail frontage within Belfast City Centre

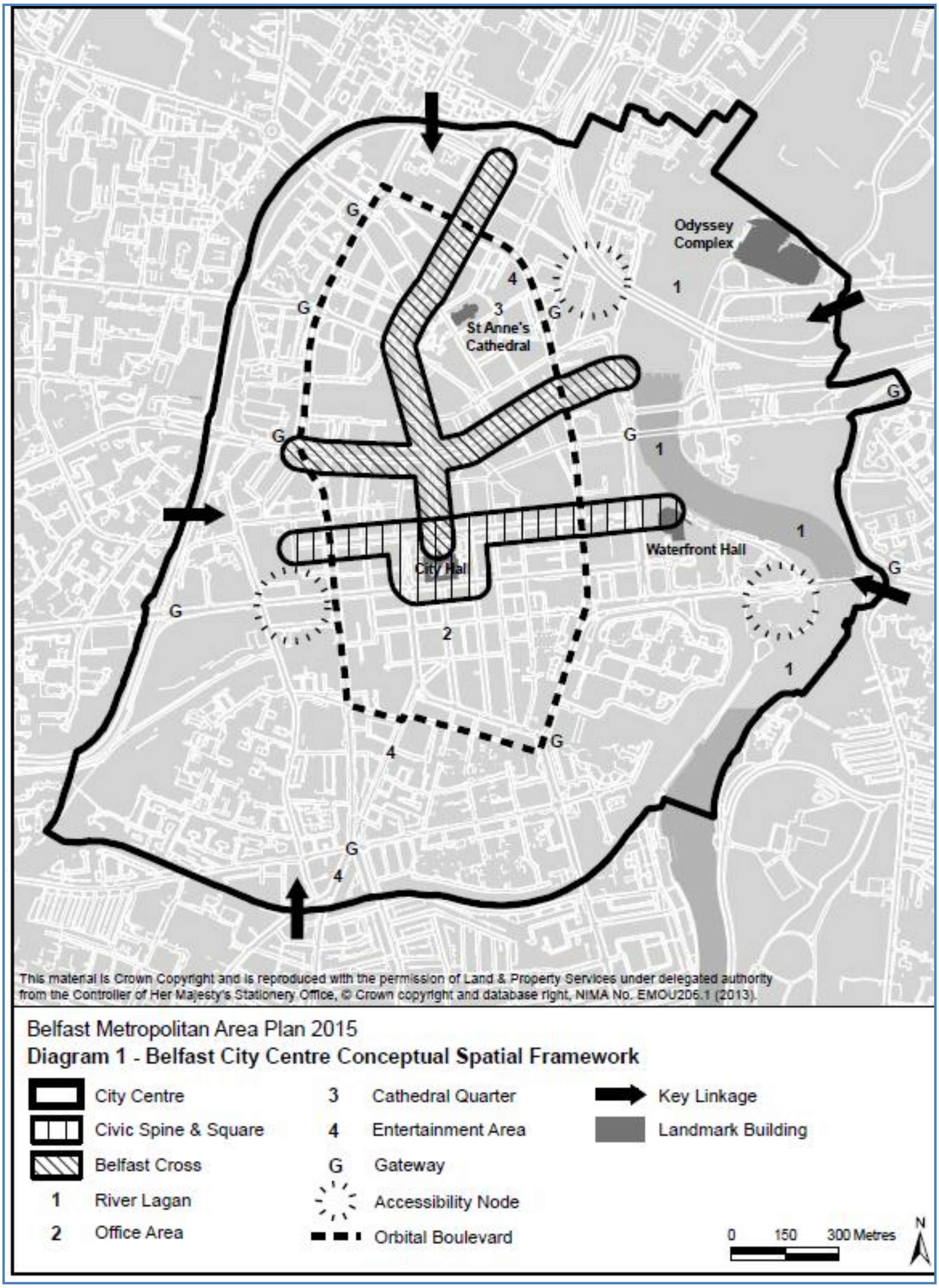
Figure 1 - Primary Retail Core Area (BMAP)



Belfast Primary Retail Core

2.18 The Primary Retail Cores (PRC) will be the preferred location for new comparison and mixed retail development. Outside designated PRCs, planning permission will only be granted for comparison and mixed retail development where it can be demonstrated that there is no suitable site within the PRC. The PRC within Belfast City Centre defines the main focus of retail activity and retail investment during the Plan period. It includes the main retail outlets along Donegall Place/Royal Avenue and extends westwards to Millfield/King Street/Queen Street and eastwards towards Bridge Street/Church Lane and Victoria Street. The Primary Retail Core also contains banks and professional offices within Royal Avenue, Wellington Place and Fountain Street; civic buildings, dispersed cafes and pubs and restaurants between Ann Street and High Street and off North Street. The Primary Retail Core also comprises two development opportunity sites and is known as the ‘Belfast Cross’ a pedestrian environment area of high accessibility and density along the routes of Royal Avenue and Donegall Place.

Figure 2 - City Centre Spatial Framework (BMAP)



2.19 BMAP states the following in relation to the city centre:

- Non-retail development will be restricted in designated Primary Retail Cores (and Primary Retail Frontages) so that no more than 25% of the frontage of the shopping street(s) to which it relates is in non-retail use and no more than three adjacent units are in non-retail use.

- Recognition that the city centre is the first choice for major office development

- Designation of 13 housing zonings existing housing areas within the city centre to include committed and uncommitted housing sites and those zoned for social housing to protect existing and help create day and night vitality. There are also 15 areas zoned as committed housing which are built and 13 protected housing areas.

- Designation of 9 character areas as follows: Commercial District, Civic Precinct, Old City, Scotch and Cathedral Quarter, West City Fringe, Great Victoria Street, Shaftesbury Square, Laganside South and Markets and Laganside North and Docks,

- Designation of 5 development opportunity sites at Castlecourt, Grosvenor Road, Sirocco, Mays Meadow and Cathedral Way/North Street

- Designation of an Area of Parking Restraint within the Core and Fringe of the City together proposals for pedestrian/cycle bridge crossings, an extended railway station at Great Victoria Street and non-strategic city centre ring road scheme

- Designation of City Centre, Cathedral and Linen Conservation Areas; 4 Local Landscape Policy Areas, An Area of Townscape Character at Victoria/Oxford Street and designation of Clifton House as an Historic Park, Garden and Demesne and a number of open space areas including amenity space surrounding the City Hall.

Belfast Retail Hierarchy

2.20 The BMA Retail Strategy also recognises that outside Town and City Centres the nature and scale of retail developments should be controlled in order to protect the vitality and viability of the City Centre and directs retail development towards specific designations. BMAP 2015 recognises a number of suburban district shopping centres within Belfast Council area based at Connswater, Park Centre, Kennedy Centre, Westwood Centre, Cityside (Yorkgate), Hillview (Crumlin Road) and Dairy Farm, Stewartstown Road. There are also local centres at Dunmurry, Kingsway and King's Square, Dundonald and neighbourhood centres along arterial routes. Boundaries of the district centres are designated within the BMAP. It is also recognised that there are district centres in proximity to Belfast LGD boundary namely Forestside District Centre in Lisburn LGD and Abbey Centre District Centre in Antrim and Newtownabbey LGD. BMAP designates 18 Arterial Routes, 14 Commercial Nodes and 17 shopping/commercial areas on arterial routes in Belfast LGD. (Appendix –District Centres and Commercial Areas).

2.21 Within designated commercial nodes and shopping/commercial areas on Arterial Routes and in the designated Local Centres, BMAP states that planning permission will be granted for retail development proposals provided that:

- any individual unit created as a result does not exceed 500m^2 gross floor space for convenience shopping or 100m^2 gross floor space for comparison shopping;
- the proposal meets a local need;
- the proposal would not adversely affect the vitality and viability of existing centres within the catchment area;
- the proposal would not alter the role and function of the centre or shopping/commercial area or node; and
- the proposal would not lead to a detrimental impact on the amenity of the area, traffic movements or road safety.

2.22 Local centres on arterial routes are generally limited in scale to fulfilling a local need and are readily accessible from public transport. The plan seeks to strengthen the role of arterial routes.

Figure 3 - Belfast Arterial Routes (BMAP)

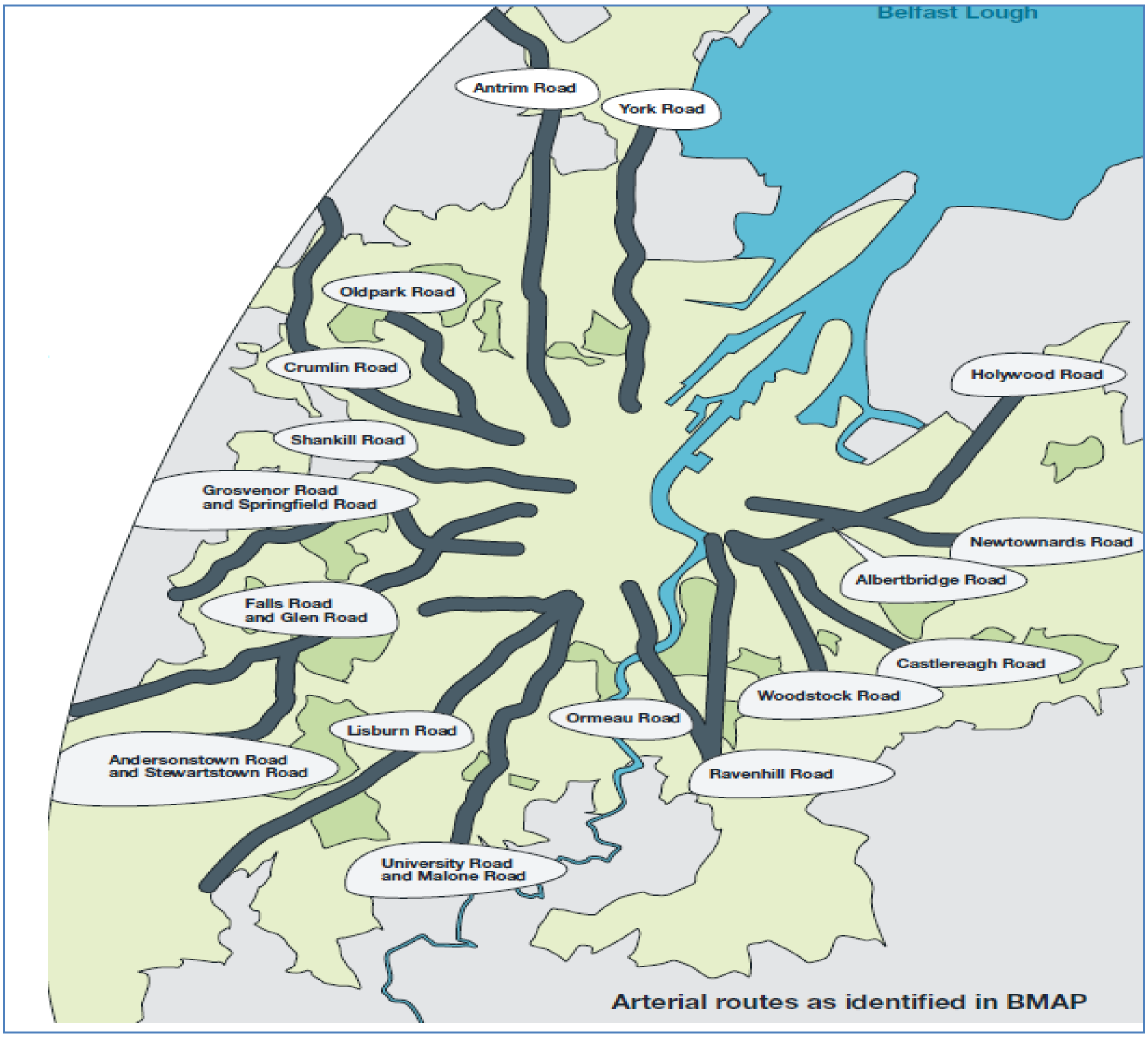
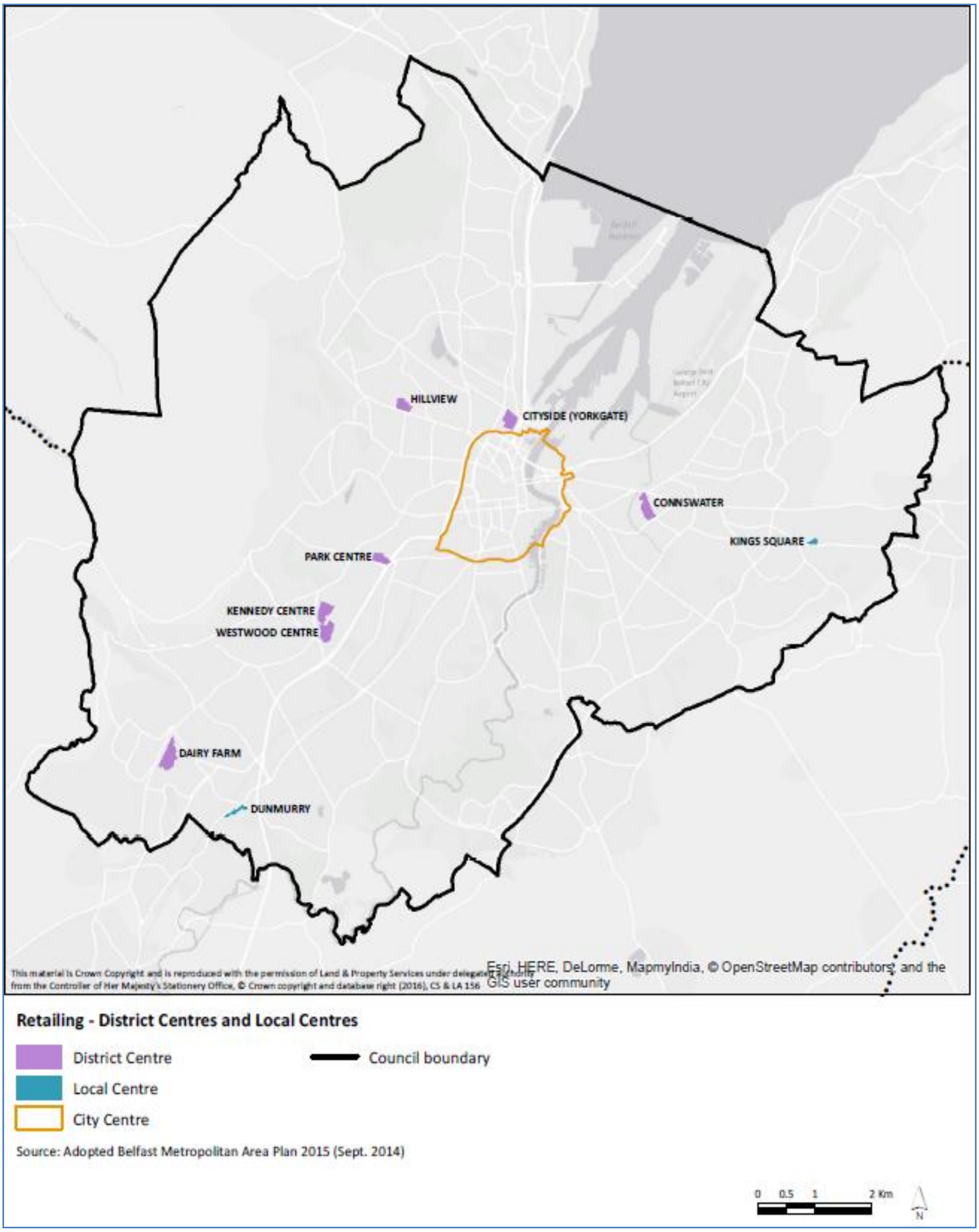


Figure 4 - Context of District Centres within Belfast LGD (BMAP)



BMAP 2015 BMA Office Strategy

2.23 This strategy promotes the City Centre as the primary office location in NI and the first choice for major office developments, with limited dispersal of major office development to major employment locations, such as Belfast Harbour - restricted to 20,000sqm of which 15,000sqm within the Titanic Quarter and 5000sqm within the Sydenham Business Park.

Outside the City Centre and this area, office development of an appropriate scale is permitted within designated district centres, shopping areas on arterial routes and designated local centres, within Queen’s University Area to provide University related uses and within Stormont Office Node to provide public sector administration. Within district centres, local centres and commercial nodes offices are restricted to Class A2 and B1 (a) uses and 400m^2 and on shopping/commercial areas offices are restricted to Class A2 and 200m^2.

Belfast City Centre Regeneration and Investment Strategy (BCCRIS)

2.24 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.

2.25 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.

2.26 The Strategy also identified five special action areas within the City Centre, to include a new transport hub around Great Victoria Street and furthering regeneration in the North East Quarter through anchor developments alongside public realm schemes and social and cultural activities. The City Centre Investment Fund of approximately £19m has been established to kick-start projects in conjunction with the private sector that demonstrate an economic return. A further £4m fund has been established for projects that can demonstrate social return and is under development.

Figure 5: Special Areas & Neighbourhood Connectivity (BCCRIS)

Draft Linen Quarter Public Real Analysis and Vision

2.27 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 document 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. Public consultation of the document closed on the 11th March 2016.

Figure 6: Linen Quarter Area

Belfast Agenda

2.28 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. It will be a joint vision for Belfast created in partnership with key partners, residents and community organisations to outline how the Council will work with statutory, business and community partners to shape future development and growth by setting medium and long term goals for social, economic and environmental improvements over the next 15 years. A draft Agenda is to be prepared for consultation in late 2016 and the first community plan is intended be published in 2017. The emerging priorities include business and economy; living here; working and living and City development.

3.0 City Centre & Retailing Profile

City Centre Overview

3.1 Belfast is the regional capital and major focus for regional administration, commerce, specialised services, cultural amenities, employment and development opportunities. It is the leading regional shopping centre and primary office location with the largest concentration of employment and commercial floorspace in Northern Ireland.

3.2 The City Centre includes some of the City's most prominent civic and historic buildings, primary pedestrian routes, gateways and accessibility nodes, the orbital boulevard, River Lagan and waterfront, former industrial and port lands, areas of cultural and heritage, entertainment areas, areas of housing. The City Centre is bound by the inner ring road, an orbital boulevard and the east bank of the River Lagan between the Albert and Queen Elizabeth II Bridges.

3.3 Belfast City Centre is the primary office location in NI and the first choice for major office developments. Approximately a third of non-domestic properties within the City Centre are offices. The core office district is dispersed around the City Hall along Linenhall Street, Adelaide Street, Bedford Street and east of the City Hall around Chichester Street and May Street. The area south of the City Hall has become the City's prime business destination and comprises many vacant buildings of historic interest and secondary office stock

City Centre Housing

3.4 The existing development plan designates housing areas within the City Centre. Good quality housing provision is required to attract new comers, protect the amenity of existing city centre residents and also to facilitate the affordable and mixed tenure housing that can assist in creating balanced communities. Although the population of the City has increased over the last ten years the overall residential population of the City remains relatively low. There is significant interest in planning applications and policy relating to student accommodation given the relocation of Ulster University into the Centre from its present Jordanstown Campus, which will increase the residential student population living within the North of the City Centre. A significant residential population is highly important for the successful functioning of the City Centre in relation to complementary services such as retailing, supply chains, leisure, employment, growing the evening economy and the relocation of the campus will act as a catalyst for development in the northern area of the City Centre. It is estimated that 15,000 students will be attracted to the new campus with estimated expenditure of £94 million p.a. The campus may also act as a catalyst for complementary land uses to serve a residential population such as leisure, nurseries and multi-faith centres. The residential potential of vacant and underutilised sites such as Sirocco; riverfront areas such as Titanic Quarter, Queens Quay and Odyssey Quay to the east and inner-west of the city core and the vacant upper spaces of buildings of heritage within the City Centre have not been fully realised.

City Centre Heritage & Design

3.5 The City Centre comprises good quality built heritage and areas of diverse character. The Cathedral Quarter is firmly established as the main hospitality area and focus of the evening economy comprising hotels, arts centres, restaurants and bars, which will be augmented by the development of the Destination Cathedral Quarter (CQ) BID. Whilst there has been considerable urban renewal and environmental improvements to establish areas within the city, there are persistent areas of dereliction and vacancy within the Inner West/Castle Street area and North-east/North Street area. The promotion of design of aspirational and visionary quality and investments in the City Centre can have social impacts and those 'in between' spaces and streets the public realm are crucial in developing the structure and form of the City and creating safe, shared spaces.

3.6 Supporting good design and positive place making within the City Centre developed with a people-centred focus can provide shared, inclusive and neutral meeting spaces where people from all communities in Belfast can meet together and that are readily accessible and well connected to the transitions and edges of the City Centre and into the wider neighbourhoods. Increasingly the focus has been on 're-humanising' the City Centre through traffic calming measures and improved cycling lanes. Examples of spaces within the City Centre include the City Hall grounds, which is well used as a meeting place and place of focus of event activity. There is unrealised potential for spaces within the City Centre and spaces that are under-utilised and unviable such as Writers Square and St Annes Square to be better established as family friendly spaces and leisure spaces. The Streets Ahead programme phase 3 will be progressed around the new University of Ulster campus to increase public realm and encompasses the fore-mentioned squares delivering a visually appealing and stimulating environment and generating pride of place.

3.7 Belfast City Council is developing 'Place Positioning' to support ambitions of the City, improve standards, support economic growth and increase civic pride. It reflects the City's ambitions, its values and the agreed narrative is collectively owned by the City's stakeholders. This promotion and championing of the City through 'on the road' events in target cities and marketing strategies and communications with stakeholders and partner organisations will aid to influence projects and Council priorities.

Tourism

3.8 Belfast tourism has displayed impressive growth, quadrupling visitor trips and tourism spend between 2000-2013 to become a significant destination, generating 43,000 jobs and contributing to 5.2% of the economy in 2013. Belfast LGD attracts the largest number of overnight trips and the highest proportion of overnight business trips of all the LGDs in Northern Ireland. The expansion of the Waterfront conference and Exhibition Centre is to create 1500 new jobs and bring in £45 million of additional income by 2020 as conference and business tourism increases. Whilst there have been a number of recent hotel developments around St Anne's Square and the Cathedral Quarter demand for accommodation remains high as the international profile of the City continues to rise.

Belfast is estimated to be in need of 1000 hotel rooms between 2015 and 2020 and there are pending planning applications to the south centre within Bedford and Victoria Streets. Recent figures show that nine hotel transactions in 2015 have totalled almost £70 million, and there are plans to add around 1,200 new bedrooms to Belfast's hotel portfolio (NI Update 2015 - Rejuvenating Belfast 4th Quarter 2015 www.lisney.com).

3.9 The Titanic exhibition and the Ulster Museum were the most popular visitor attractions in 2013 (NITB Belfast LGD Factcard) and investment in arts and cultural infrastructure and event programmes like the Tall Ships and Giro D'Italia have generated national and international media impact and attracted many tourists to the city. Complementary services such as cultural facilities and attractions, restaurants, cafes and bars, specialist and unique shopping quarters and entertainment all increase the tourism offering of the city. Future opportunities within cruise tourism, adventure tourism such as T13 urban sports centre and creative and cultural facilities exist within the City region.

Access & Transport

3.10 The City Centre is at the core of the Regional Strategic Transport Network and transportation hub for the Metropolitan Urban Area. Although there have been improvements to bus lanes within the centre, facilities for cycling and cycle lanes, new pedestrian bridge and commencement of the E-way and W-way rapid transport system, issues remain regarding the connectivity and accessibility of the city centre for all. There exist opportunities within the City to provide high accessibility public transport nodes to improve links between transport nodes and the wider region. The planned York Street interchange will provide links between the Westlink, M2 & M3 provided in underpasses beneath new bridges structures at York Street and under existing Dargan and Lagan bridges and will hopefully commence following the Public Inquiry. The proximity of Belfast George Best Airport to the City Centre is an advantage and opportunities exist to better integrate with public transport links to the airport. There exist opportunities within the City Centre to expand provision of bus/coach parking and improving accessibility to tourist attractions out of the City Centre such as Titanic Belfast and the Crumlin Road Gaol. This would provide opportunity to grow the market of coach day trip market shopping trips, sightseeing, visits to events and attractions and also overnight trips if such facility was provided.

Key Retail Data

3.11 In preparing the new Plan, an assessment will be undertaken of the health of the city using a variety of indicators and retail capacity study based on an assessment of retail trends. Whilst this will be undertaken at a later stage, there are a number of existing studies related to the City Centre, including research by Belfast City Council and the Belfast City Centre Management Team, which can inform the existing retailing context. A range of indicators such as existing uses, the resident population, vacancy rates, footfall, constraints, retailer representation, rental values and physical structure and environmental quality/cleanliness can provide a view of performance and vitality of a centre. Belfast City Centre Management Team (BCCM) are involved in a 'healthy high street' programme with objectives of increasing footfall, reducing the number of vacant units and creating jobs including employment created through ‘pop-ups’. A recent perceptions report by BCCM indicated that two-thirds of respondents believed that the City Centre has a considerable number of quality retail stores – however, only half of the respondents considered it to be their first choice location for shopping.

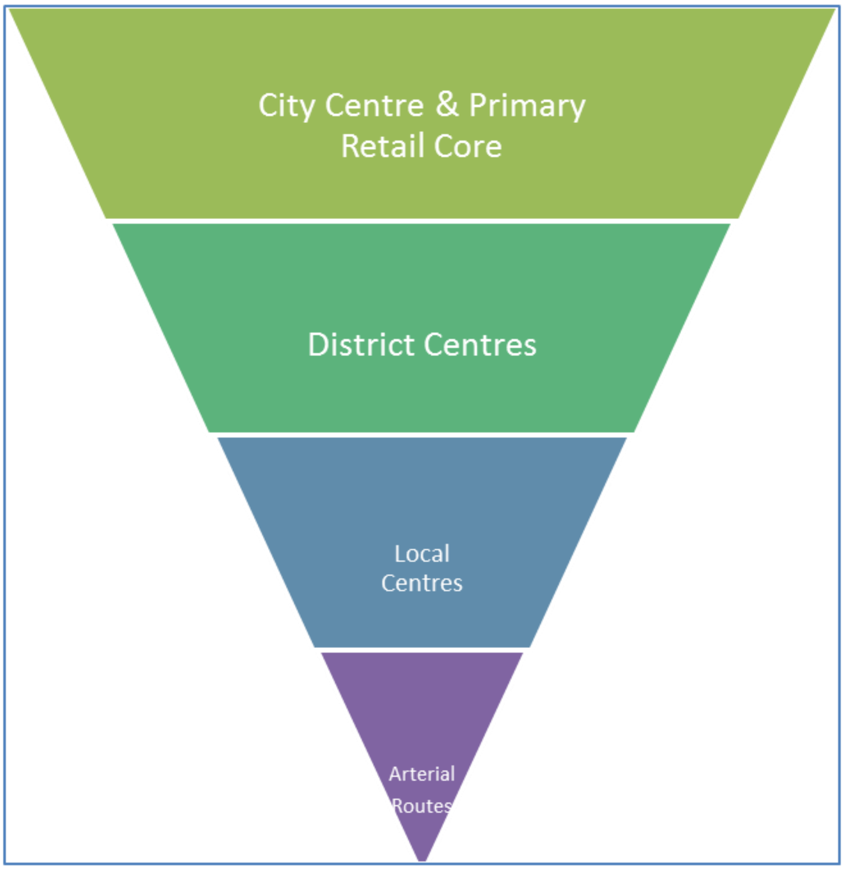
3.12 As of September 2015 there were 4,508 properties rated as shops in Belfast, based on the LGD 2014 wards, of which 3823 were occupied and 685 were vacant. The majority of these are within Central ward, which comprises the City Centre and Primary Retail Core; followed by the wards of Blackstaff, which includes Boucher Retail Park, Duncairn/the Harbour area and Beersbridge, Connswater and Windsor wards, which include arterial routes (LPS Rating information 30th September 2015). Many streets on the periphery of the City Centre, such as Sandy Row for example, once thrived as shopping streets with unique retailing offerings but have since lost vibrancy.

3.13 District centres provide shoppers with convenience and choice. Whilst centres such as the Kennedy Centre and Westwood Centre are over-trading and attracting trade away from the City Centre, some centres such as Connswater, where retailers have withdrawn, are failing. In some commercial nodes, Prime Rental Values such as Antrim Road and Belmont Road are approximately £250sqm, in contrast to those on Crumlin Road which are approximately £90sqm. (LPS 19th June 2015).

3.14 The Belfast City Council ‘Renewing the Routes Programme’ spanned over 40 miles of arterial routes, taking in 2500 local business and 100,000 residents. The programme targeted areas that were most in need, such as Andersonstown Road and Newtownards Road, to connect neighbourhoods with the City Centre, with opportunities to promote community stewardship. Our arterial routes have suffered from vacancy and neglect and many have a poor quality offering or are under pressure from food uses that do not serve the local day to day needs of local neighbourhoods or promote health and well-being of our citizens or detrimentally impact upon the local communities. Commercial uses should be at a scale, nature and design appropriate to the area that it is serving. These centres/routes have a role and function within the retailing function by providing local neighbourhoods day to day needs.

3.15 As part of the preparation of the SPPS a study was undertaken by GL Hearn on behalf of DOE Planning to research issues surrounding town centres and retailing in Northern Ireland (January 2014). This included health checks for existing town / city centres as designated in adopted plans using a variety of health check indicators and an assessment of town centre and retail trends. Overall the town centre health checks did not identify any towns that were performing badly, but equally there was little evidence of any particularly strong performance. The study recognised that there is room to improve the vitality and viability of town centres through diversity.

Figure 7 - The Hierarchy of Retail Designations (BMAP)



GL Hearn Town Centre and Retailing Research January 2014

3.16 In compiling the GL Hearn study, town centre composition data was obtained from Experian Goad who carry out physical town centre surveys and prepare occupier plans for most town centres in the UK.

3.17 Some of the key findings regarding Belfast specifically included:

- Belfast City Centre has a footprint floor space of 340,000sqm gross, in comparison to the Northern Ireland average of 68,800sqm gross (excluding Belfast). Belfast's catchment of 602,000 people places Belfast 13th out of 22 major cities in the UK.

- Vacancy rates for Belfast by floor area is 10%, in comparison with the Northern Ireland average of 12% and UK average of 8% and, by unit numbers, at 17% in comparison with the Northern Ireland average of 14.5% and UK average of 10.5%.

- Belfast City Centre has a good representation of independent long established national and multi-national businesses offering convenience and comparison retailing and service uses.

- Retailers have sited on secondary pitches within the City Centre, including within Arthur Street and Ann Street.

- Prime rents on traditional pitches have fallen.
- Victoria Square attracts higher end aspirational retail.
- Belfast attracts major anchors of national multiples and major developments
- Belfast has a wider catchment beyond borders as customer travel further distances for stronger retail offering
- Belfast is increasingly dominated by multiple retailers with requirements for larger units of 500 -2000sqm.

3.18 The report found that in Northern Ireland the proportion of other centres uses, such as transport services, employment and commercial activities, religious buildings, wholesale trade, civic and unclassified buildings, was higher than the UK average and highlighted the specific importance of the service sector (42%) and non-food shops (35%). Convenience food floor space is focused in proportionately small number of larger units reflecting the wider UK trend of the dominance of larger supermarkets.

3.19 The report highlighted that out-of-centre retailing is focused outside larger town centres or on strategic routes, particularly the M1 such as Westwood and Kennedy Centres, Boucher Shopping Park and Park Centre and comprise both bulky goods and increasingly national multiple clothing retailers. The report identified the trend of national retailers centralising services to serve a wider catchment to achieve economies of scale. GL Hearn indicated that it would be appropriate to have a stronger policy stance on protecting and enhancing town centres, encouraging private sector investment and making town centres the focus for not just retail but other significant footfall generating uses. The adoption the SPPS has consolidated this town centre first approach.

3.20 The economic downturn had a negative effect on consumer spending and was expected to remain low for 3-4 years following publication of the report in January 2014. This downturn impacted upon the high streets in terms of vacant units and quality of the retailing offering. However, national trends show growth in areas of home shopping, electronic commerce and high street retailers offering ‘click and collect’ facilities as retailing evolves and City Centre retailers space requirements may alter to facilitate. The report acknowledged growth in the number of discount stores and food sector including restaurants and coffee shops.

Figure 8 - Town Centre Size Total sqm gross space

(GL Hearn Town Centres & Retailing Research Paper January 2014)

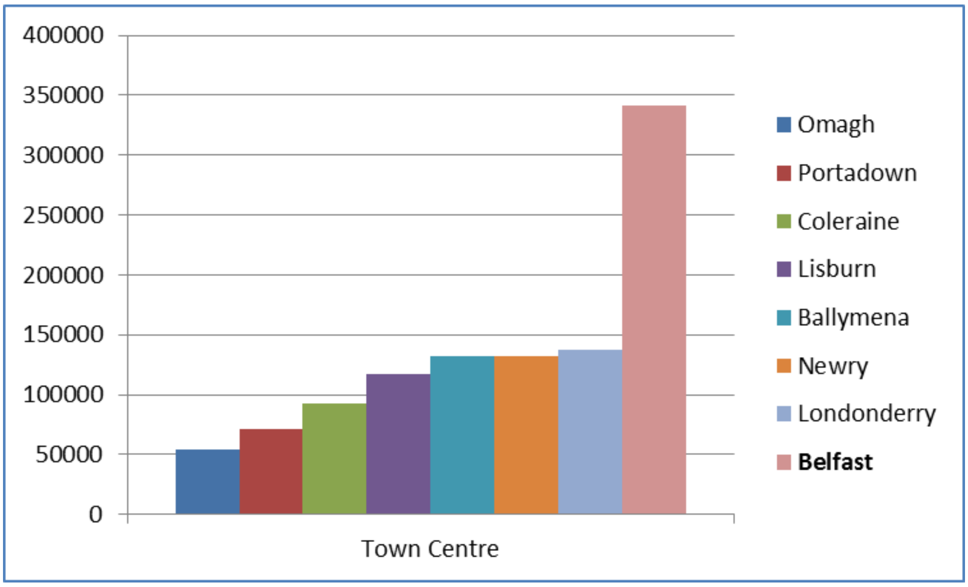


Figure 9 - Vacancy Rate Unit No's in %

(GL Hearn Town Centres & Retailing Research Paper Jan 2014)

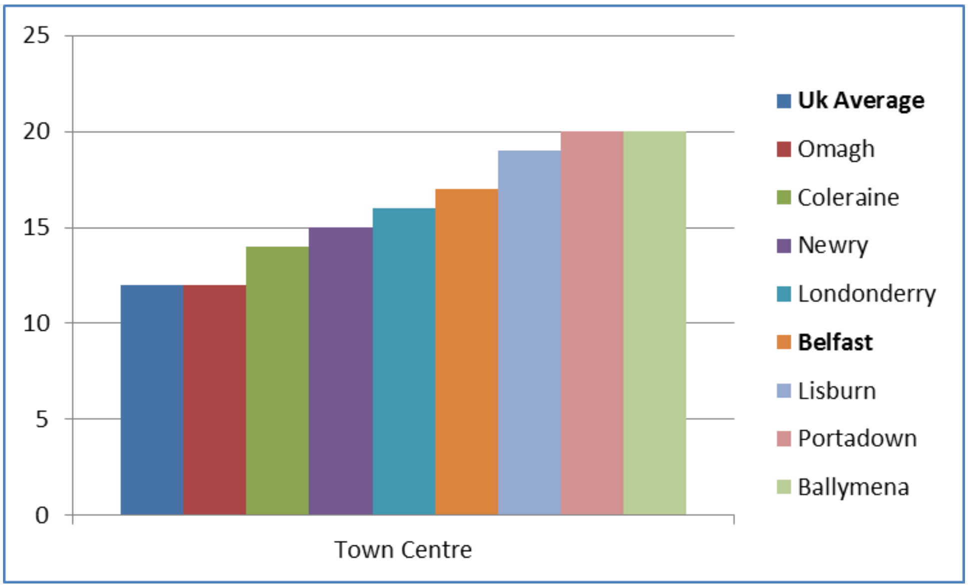


Figure 10 - Vacancy Rate Floor Area % (GL Hearn Town Centres & Retailing Research Paper Jan 2014)

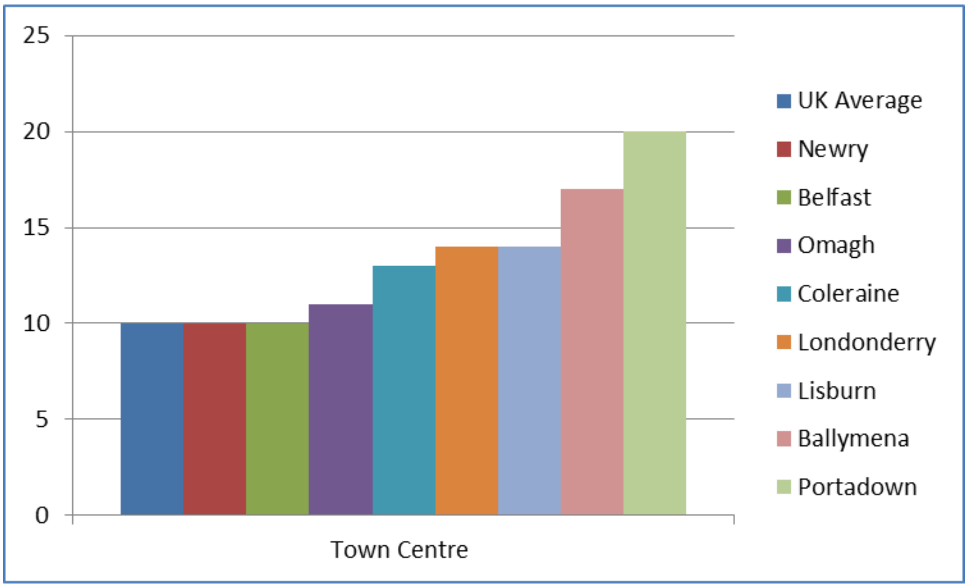


Figure 11 - Table - Vacancy Rate Regional Comparison (GL Hearn Town Centres & Retailing Research Paper Jan 2014)

Jurisdiction	Vacancy Rate	
	Units	Floorspace
UK	10.56%	8.18%
England (excl Gtr. London)	11.05%	8.48%
Wales	12.34%	10.14%
Scotland	10.99%	9.12%
Northern Ireland	14.5%	11.9%

3.21 The report concluded that many NI towns are reasonably vital and viable as they retain a good mix of uses, a degree of accessibility, provide parking, involve linked trips, comprise independents/family businesses and are undertaken with a degree of loyalty. However the report did state that town centres need to offer an above the average shopping experience, ensure that centres are attractive to all age groups, have a diversity of uses and are adaptable to future trends. The report however excluded arterial routes and commercial nodes.

3.22 GL Hearn found that as the regional capital Belfast has an excellent range and choice of shopping facilities represented by a mix of multi-national companies and independent retailers. There are main food stores located within the city centre in the form of Tesco on Royal Avenue and a metro store on North Street, recent Lidl development within the former ‘In Shops’ as well as long established Marks and Spencer and Dunnes Stores. With an increasing student population in the City Centre there are further opportunities for supermarkets and grocery shops. There are a range of convenience retailers including bakeries, health and food shops, off-licences, newsagents, butchers and groceries. Approximately 53.7% of ground floor businesses are independently owned.

3.23 The City Centre comparison goods offer is provided by both multi-national and independently owned businesses. There is a good range and choice of clothing and fashion multi-nationals and independently clothing retailers such as ‘Liberty Blue’, ‘Fresh Garbage’ and ‘Reids’ on Sandy Row. There is also good offering from independently owned jewellers such as ‘Malcolms’ and gift stores such as ‘Utopia’. There are also a few retailers offering ‘white goods’ and other electrical goods although ‘Currys’ has relocated from the City Centre. Of all the non-domestic properties within the City Centre 1034 (28.1%) were retail (Pointer, LPS/BCC Profile 2014).

3.24 The service category provides the City Centre with a good range of food and beverage outlets. The BCCM perception report (January 2016) found that 75% of respondents considered the City Centre to have a substantial number of high quality restaurants and pubs to choose from, although just 40% of persons stated that the City Centre was their first choice for dining and entertainment. Whilst the City Centre food offering is the highest in Northern Ireland, it has a below average representation of food service multiples. However, there is a necessity to manage proximity of use, control advertising and curtail concentration of hot food takeaways which has links to poor health and obesity. There is also a notable presence of banks, solicitors and financial advisors and other services such as hairdressers, beauticians, opticians, dry cleaners and shoe menders. Although the retail offer is well represented in clothing and accessorises, it is relatively under-represented in menswear, footwear, jewellery, household goods, electrical and furniture which may be accommodated by a large department store (GL Hearn report). Belfast is relatively under-provided for in Department stores and luxury or upper market goods compared to other major cities of similar catchment and there are opportunities for retail to be more aspirational providing a unique regional offering.

Lisney NI Retail Update 2014

3.25 The Lisney NI Retail Update 2014 indicated that, whilst there has been a reduction in overall vacancies from a wave of consumer confidence and increase in long term vacant secondary retail units converted into other uses such as offices, restaurants and cafes, there is still significant vacancy on prime locations. Impacts of the revaluation of the business rates have been a catalyst for improvement. There has been a reduction of 55% on Donegall Place the prime retail frontage and 25% within Victoria Square shopping centre since April 2015.

Figure 12 - Percentage reduction in Rateable Value of Prime Shopping Centre Units 2014 (GL Hearn Town Centres & Retailing Research Paper Jan 2014)

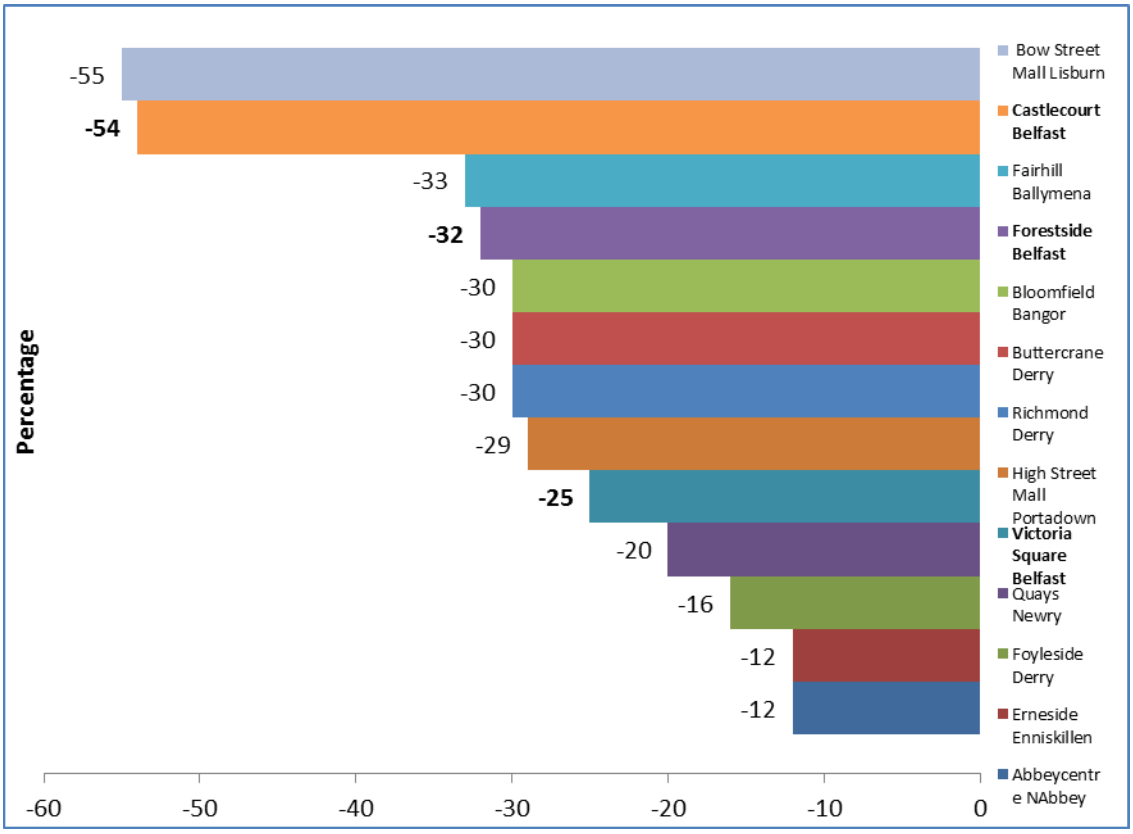


Figure 13 - Reduction in Rateable Values for Prime Northern Ireland High Streets (Finnieston et al 2014)

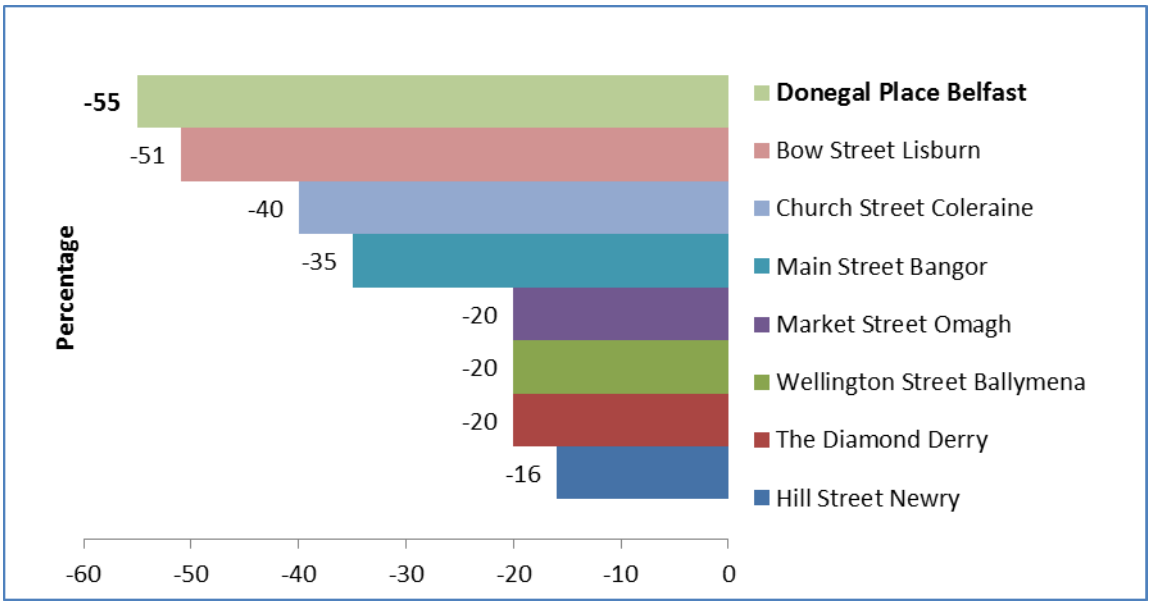
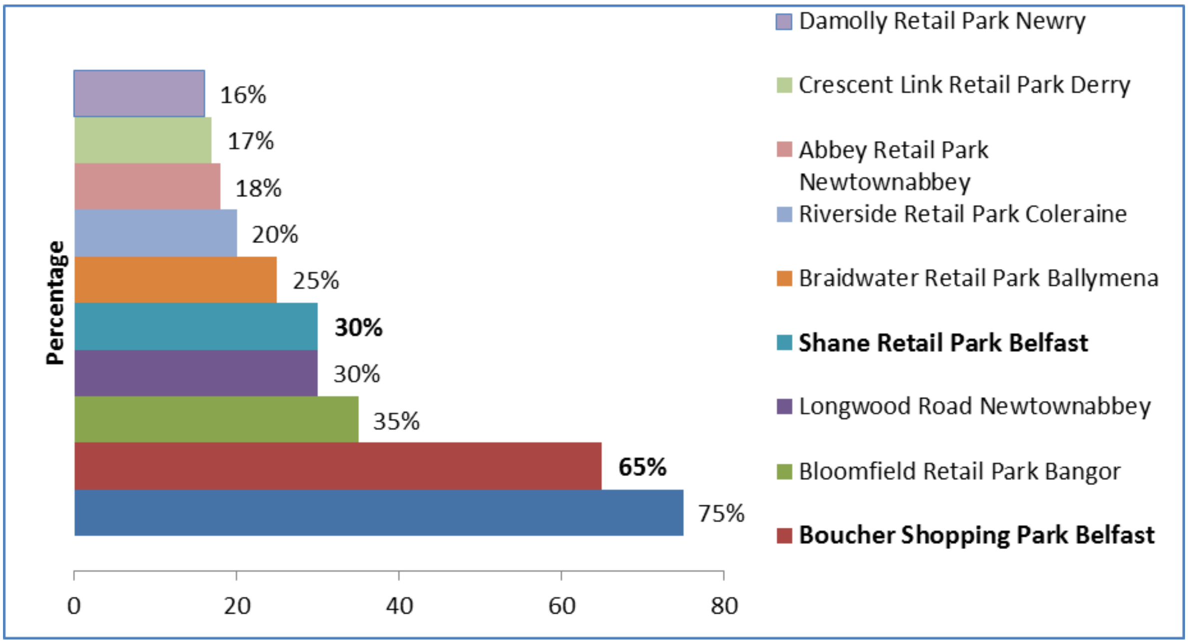


Figure 14 - Percentage Increase in Rateable Values for Prime Retail Parks 2014
(GL Hearn Town Centres & Retailing Research Paper Jan 2014)



3.26 Lisney Retail Update 2014 predicts further reduction in vacancies, particularly for prime shopping centres and is optimistic that landlords can look forward to rental growth. Rental values provide an indicator of vitality. Prime Rental Value within Donegall Place stood at £1,250 for Boots Chemist premises (LPS June 2015 Valuation of Non-domestic) and Primary Zone A rents (defined as the most valuable area of the shop i.e the first 5m depth) have declined falling dramatically from a high of £225 in 2002 to a low of £150 in 2010 in the traditional primary retail core of Donegall Place (Deloitte – Javelin Group 22nd June 2015).

3.27 Some 217 units as of January 2015 were vacant. Castlecourt shopping centre vacancy rate stood at 15.3%; Victoria Square vacancy rate at 12.5%, Spires's shopping centre at 13% vacancy and Great Northern Mall had 0% vacancy (BCC Vacant Units Report – BCCM SR No 101).

3.28 The North East Quarter within Scotch/Cathedral and Old City Character areas, which also falls within the Primary Retail Core, has a higher than average vacancy rate in comparison to Belfast City Centre average. There is 200,000 sqft of gross retail/business space in Lower Garfield Street and North Street of which 11% is vacant (Deloitte – Javelin Group 22nd June 2015). The relocation of the University Campus to the North-eastern quarter may act as a catalyst for this area with opportunities for retailing particularly in clothing, groceries and leisure activities, with commercial uses included in the planning approval.

Belfast City Centre Regeneration and Investment Strategy (BCCRIS)

3.29 The Belfast City Centre Regeneration and Investment Strategy highlighted opportunities for mixed use retail led development within the North Eastern Quarter; possible development of Castlecourt; opportunities for retailing at the proposed new Transport Hub at Great Victoria Street and opportunities for small independent businesses and/or the relocation of Smithfield Market within the Inner West/Castle Street area.

3.30 Whilst there has been significant environmental improvements at ‘Bank Square’ under the DSD ‘Streets Ahead’ programme, aiding to facilitate the weekly ‘Folktown Market’, there is still significant dereliction within the Inner West/Castle Street area. The majority of this area comprises smaller independent business units and there have been a number of recent ‘pop up’ uses such as a butchers and bookshop that have generated footfall and addressed vacancy rates. In January 2016 there were 7 vacant ground floor units out of 47 units within Castle Street. High quality environments and public realm can address dereliction and influence investment in new business and there is further potential for this area to become a complementary quarter. The empty shops concession allows for 50% rate relief for up to a year once a long term empty retail premises becomes occupied with the aim of attracting businesses to the main shopping area and wider Council district.

3.31 Subject to the transfer of regeneration powers the Council will also be responsible for the resources currently directed to Belfast City Centre Management Team by DSD. The Council has a Retail Forum, to which members from Belfast City Centre Management (BCCM), NI Independent Retail Traders Association (NIIRTA) and NI Retail Consortium are invited to attend.

Business Improvement Districts

3.32 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. The ‘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. The ‘Belfast One’ BID was officially declared on the 30th of October 2015 and the ‘Destination CQ’ BID was officially launched on 11th October 2016. Both have the potential to be significant for landlords within this area to invest in agreed services, projects and special events. Discussions are also in place for a potential Linenhall BID.

3.33 The Cathedral Quarter has become the City’s main hospitality area to a mix of hotels, museums, restaurants, bars and cafes and has become an important tourist destination within the city. The success of this area may be through its management under a trust and delivery of a programme of works. The diversity of uses within this area has made an important contribution to its vitality and viability and it has become an important tourist destination. The objectives of the CQ Bid are to support and enhance cultural activities, improving trading environment/public realm, promoting local business and events, creating opportunities for entrepreneurs, working in partnership and growing evening economy and increasing daytime offering.

Access & Parking

3.34 Whilst it is recognised that high streets require car parking to encourage consumers; population dispersion, increasing car ownership and a significant number of parking spaces in our City attracts many long term commuters contributing to congestion and impacting on the quality of environment. Belfast is dominated by a transport network which has become a physical barrier separating communities from the city centre. Traders, however, still require parking and access to businesses and accessibility for servicing, deliveries and storage and should remain accessible to persons with disabilities limiting mobility or those with young dependants, for example.

3.35 A modern integrated transport system would increase connectivity and accessibility along the main transport corridors into the City Centre. Whilst the Belfast Rapid Transit (BRT) is being implemented, bus lanes have been introduced and there are a number of park and ride schemes; other transportation schemes such as the proposed extended railway station (transport hub) at Great Victoria Street/Grosvenor Road and the City Centre ring road or Bankmore Link proposed within BMAP 2015 have not been realised. However, efforts to 're-humanise' the City Centre through reduction in speed limits, introduction of bus and cycle lanes and stricter controls on penalties for obstructions could be perceived as off-putting to drivers whilst these sustainable transport methods are being developed.

3.36 Although there exists a 'Civic Spine' within Wellington Place/Chichester Street as the main public transport axis linking areas of civic importance and increased priority for public transport, walking and cycling, there exist issues of walkability within our City Centre. BCCRIS suggest increased pedestrianisation and connectivity of the City Centre to surrounding neighbourhoods and there exist opportunities to create walking corridors from future transport hubs and to pedestrianise areas as places for people for cafe culture and street trading. Pedestrian footfall in Belfast City Centre was estimated in to 9.5million in 2014 the highest for 4 years (Deloitte – Javelin Group 22nd June 2015).

Office Accommodation

3.37 The BMAP promotes Belfast City Centre as the primary location for major office development in order to reinforce the role of Belfast as the regional city and also to promote a wide choice of sites and locations to ensure requirements are met. Of the non-domestic properties within the city centre 28.1% or 1034 are offices. Pointer LPS (BCC Profile 2014)

3.38 There are other important office locations such as the Queen's University area, a number of small offices along arterial routes and Stormont office node. Stormont is long established as the key location for public sector administration of purpose built accommodation and Queen's mainly comprises professional services based within converted terrace dwellings.

Figure 15 - 'Belfast One' BID Area Map

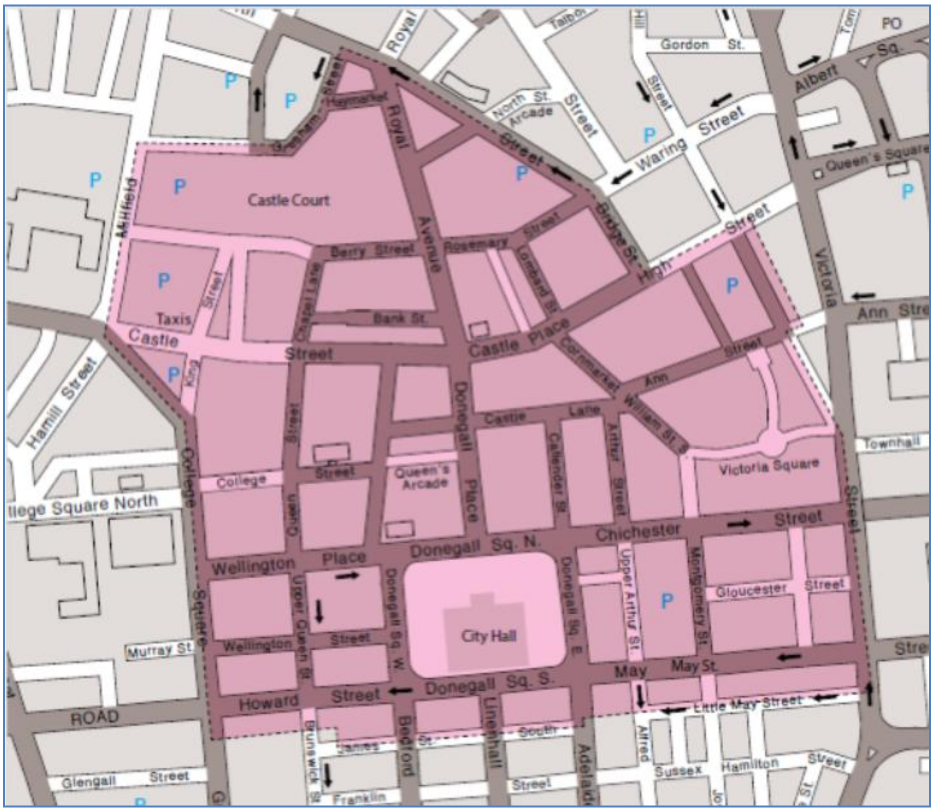
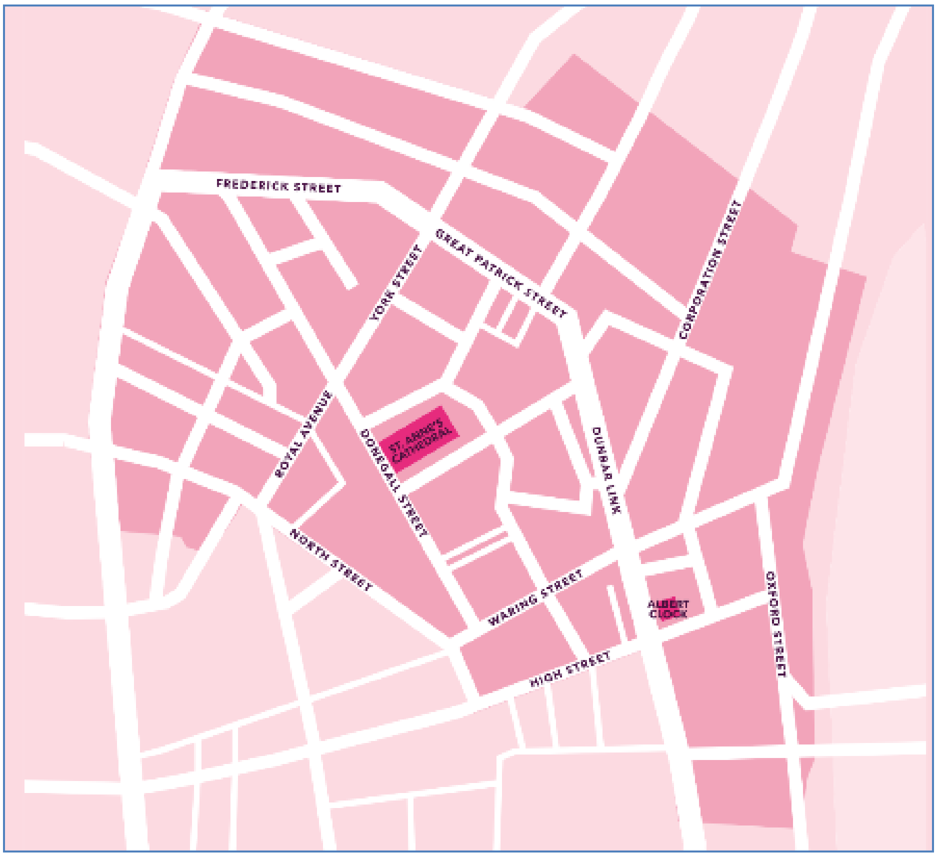


Figure 16 - 'Destination CQ' BID Area Map



3.39 The core office district is dispersed around the City Hall along Linenhall Street, Adelaide Street, Bedford Street and east of the City Hall around Chichester Street and May Street comprising many vacant buildings of heritage and secondary office stock with opportunity for re-use and upgrading to ‘A’ standard. Notable deals in the office sector include Centre House, Londonderry House and East Bridge Street. It is estimated that there is approximately 1.2million sqft of vacant secondary office space. Changes within public administration will also reduce demand for space and create opportunities in the market. The area to the south of the City Hall has in recent years become a focus for major office floorspace development, both public and private sector. Belfast Grade A office rents were £13.00sqft in 2014 a growth of 4% and Grade B were £8.00sqft. BCCM SR Bo 101 Vacant Units Report January 2015. Whilst throughout 2015 rental levels have shifted to around £15.50sqft they are still 25%-55% lower than comparable UK cities and 50% lower than Dublin.

3.40 There is no standard definition of A Grade accommodation, but in general terms it relates to new or recently refurbished offices located within a prime office location generally including open plan accommodation with carpeted raised access flooring, suspended ceilings, recessed lighting, air conditioning, fully DDA compliant and modern lifts to the upper floors.

Figure 17 - Table - Supply of ‘Grade A’ Office Space in Northern Ireland

Overall	Belfast		Outside Belfast		Total	
	Area (sq ft)	No. of Buildings	Area (sq ft)	No. of Buildings	Total (sq ft)	Total Buildings
<10,000	310,635	44	37,134	4	**347,769**	**48**
10-20,000	324,687	24	52,456	4	**377,143**	**28**
20-50,000	199,646	7	57,110	2	**256,756**	**9**
>50,000	50,617	1	55,970	1	**106,587**	**2**
Total	**885,585**	**76**	**202,670**	**11**	**1,088,255**	**87**

Source: Various commercial agents/RSM McClure Watters

Foreign Direct Investment

3.41 Reduced corporation tax rates closer to the ROI has the potential to drive letting activity as internal job creation gathers pace with the arrival of new FDI business.

3.42 In 2013 approximately 59% of the total enquires (822,000sqft of office space) to Invest NI from commercial agents related to FDI qualifying businesses and the preference for 677,900sqft of this space was in Belfast. Twenty-four of FDI qualifying businesses in 2013 were seeking accommodation in excess of 10,000sqft representing 770,500sqft (Invest NI October 2014).

Figure 18 – Table - Invest NI Identified Office Space Enquiries from FDI Qualifying Businesses (1 April 2012 - 31 Oct 2013)

Requirement Size (Sq Ft)	No. of FDI Qualifying Businesses	Preferred Location			Total
		Belfast	Outside Belfast	NI Wide	
<5,000	60	101,900	11,800	3,000	**116,700**
5-10,000	12	107,500	0	0	**107,500**
10-20,000	14	208,500	0	35,000	**243,500**
20-50,000	9	160,000	95,000	0	**255,000**
>50,000	1	100,000	0	0	**100,000**
Total FDI	**96**	**677,900**	**106,800**	**38,000**	**822,700**

Source: Invest NI

Figure 19 – Lisney Northern Ireland Office Update 2015 4th Quarter 2015

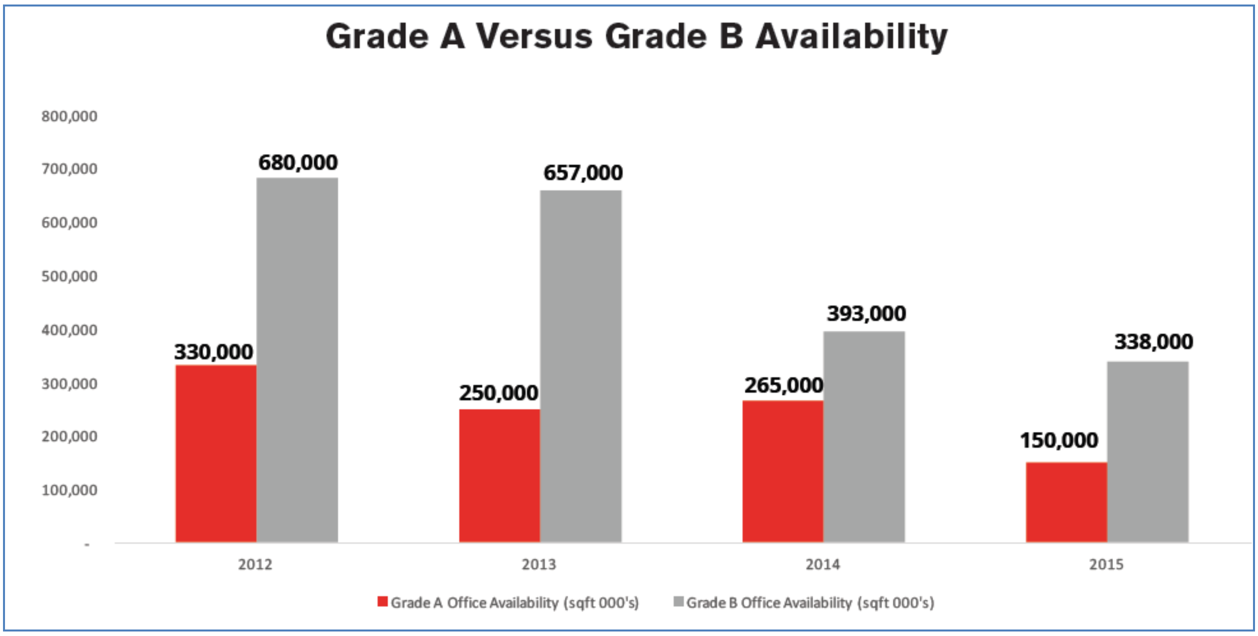
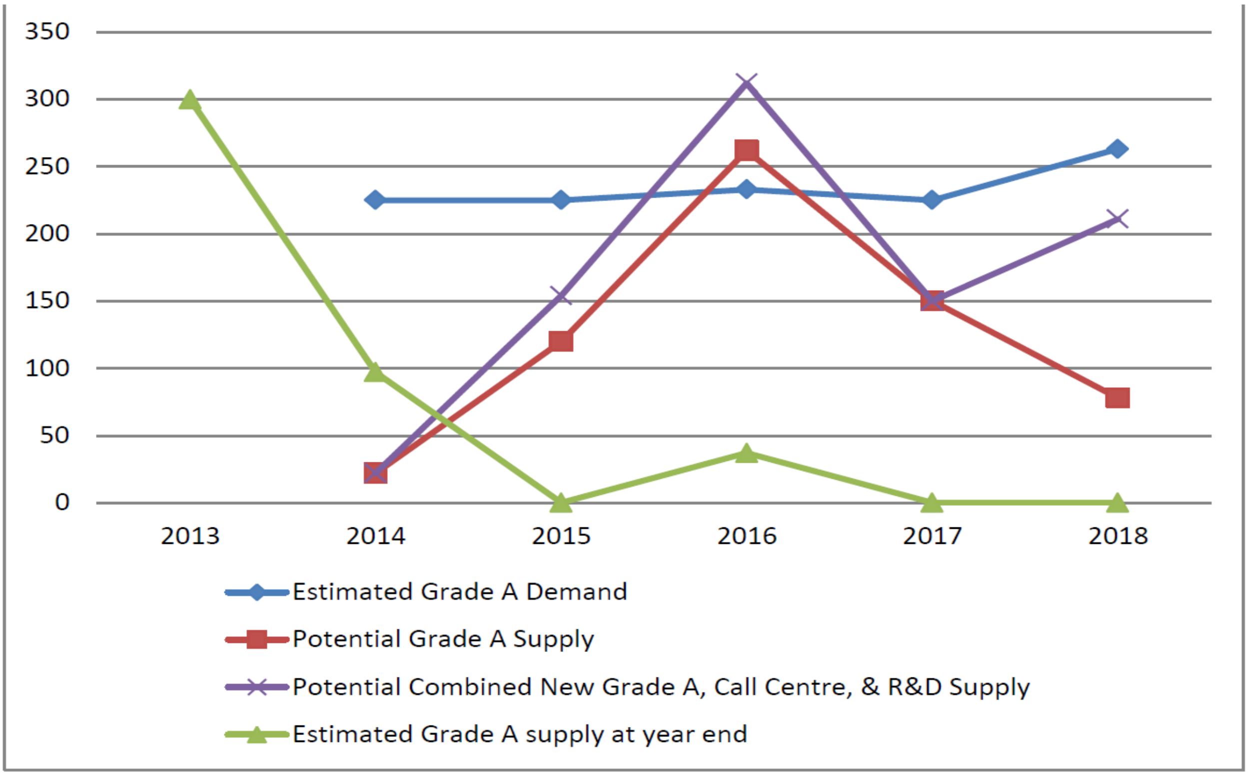


Figure 20 - Belfast Grade A Office Supply and Demand Forecast (2014 – 2018)

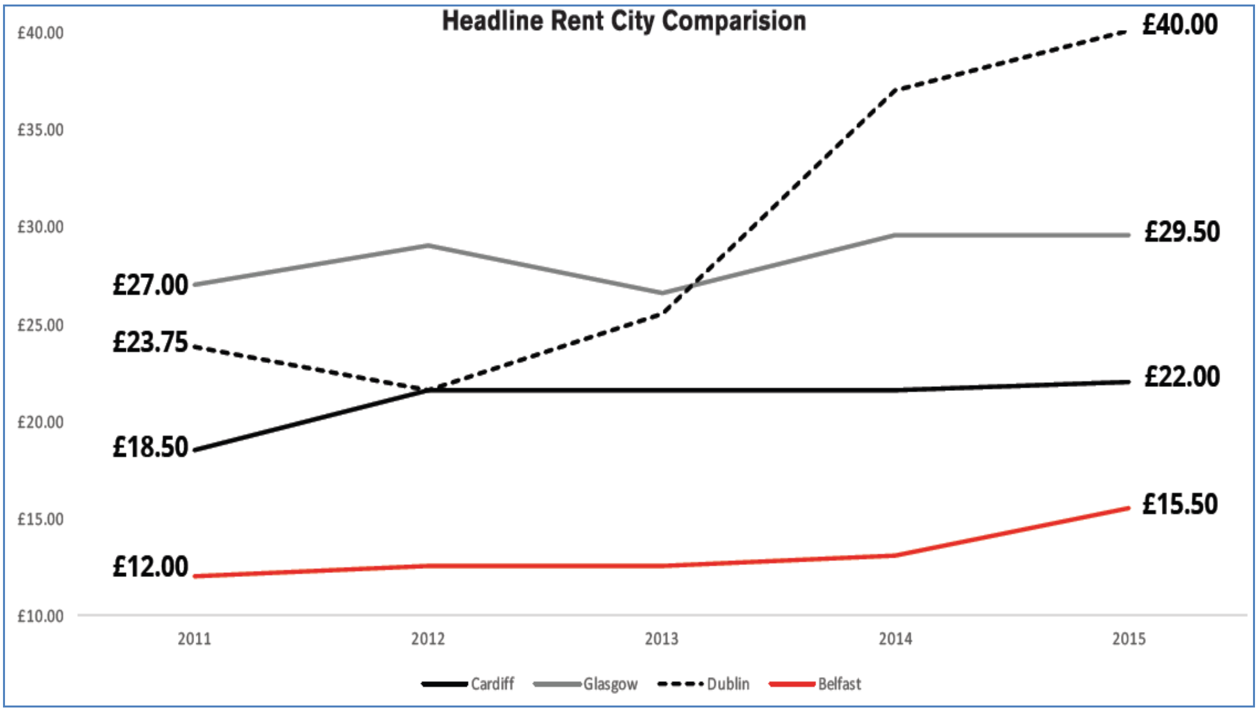


Source: RSM McClure Watters

Lisney Northern Ireland Office Update 2015 4th Quarter 2015

3.43 The Harbour Commission, which is in ownership of lands within Laganside north and the docks which fall within the City Centre boundary, has completed construction of Grade A office accommodation at City Quays (occupied by a global law firm) and has further planning permission for a second Grade A office block adjacent to be completed mid 2016. Invest NI has provided funding for further development of Grade A office space to meet future demands to address under-supply in provision. Invest NI has estimated that supply of Grade A office accommodation is insufficient to meet an average demand of 225,000sqft/year and has provided funding for further development of Grade A office space to meet future demands. Invest NI advises that capital values of newly built grade A office accommodation are between £110-190sqft and that City Quays rents are approximately £14.50. Prime rents are 25-55% lower than Uk and 50% lower than Dublin making Belfast very competitive. In 2013 60% of all office demand was for Grade A accommodation.

Figure 21 - Headline Rent City Comparisons



Source: Lisney Northern Ireland Office Update 2015 4th Quarter 2015

3.44 The BCCRIS states that office development should be accommodated at City Quays, the portion of the Titanic Quarter within the City Centre and the former Maysfield leisure site. The new transport hub also presents ideal location for Grade A office development, as does the BBC site and numerous surface carparks within the vicinity. There is also suggestion that buildings of lesser standard within the Core/Linen Quarter could be demolished and replaced. The aforementioned sites and the waterfront areas could also accommodate buildings of substantial height.

3.45 There are significant opportunities for complementary convenience and complementary services to address demands of an increasing office base.

4.0 Issues and Approaches

4.1 The purpose of this Topic Paper is to set out a summary of the evidence base required for the Sustainability Appraisal, Preferred Options Paper and the new Belfast Local Development Plan 2020-2035. It was originally were drafted in the early part of 2016 to provide elected members with baseline information to inform the preparation of the Local Development Plan. It has since been updated to ensure the statistics referenced are up to date for publication alongside the Preferred Options Paper.

4.2 The Topic Paper highlights the importance of the City Centre area and retailing on the City and Regional economy. It sets out the nature of the current retail and commercial offering, highlighting key trends, rental information, vacancy rates and potential opportunities in the City Centre and wider Council area.

4.3 The SPPS requires LDPs to prepare a retail strategy and contain policies to promote city/town centres first. In line with the RDS the plan should promote Belfast as the regional capital for commerce. District and neighbourhood centres and commercial areas on arterial routes are an integral part of the retailing hierarchy and complementary to the City Centre.

4.4 Previous work has highlighted the capacity of the city centre to accommodate growth through the use of derelict or vacant land and adaptation of historic buildings.

4.5 Belfast City Centre remains the major drivers of the city and regional economy especially for the key growth sectors of knowledge, Creative and Digital Industries, Higher Education, Culture and Business Services and the major focus on Retail, Leisure and many public services.

4.6 A strong, well-populated highly liveable and walkable city core with attractive public transport will provide some of the most effective ways of reducing our carbon footprint, strengthening our environmental sustainability and resilience to economic and environmental change.

4.7 Retail needs to remain a major part of the city centre’s function but over the new plan period should be consolidated. District and Local Centres will continue to provide shoppers with convince and choice. The shopping experience will no doubt change in light of the increasing use of the internet and become part of a rounded experience alongside leisure, work and culture. High profile national retail brands should focus on Belfast city centre matched by building on the strong independent offer.

4.8 The plan will encourage growth of business districts within the city centre including cultural industries. The cathedral quarter will be supported as its role continues to change to support the night time economy.

4.9 The City Centre housing offer will be widened to encompass residents at all stages of life particularly around community hubs with appropriate local amenities and infrastructure.

Family housing should also be promoted in inner areas around the city centre. Living conditions and amenities for city centre communities will be reviewed.

4.10 The health and investment of the two universities and Belfast Metropolitan College will support the planned growth as integral parts of the city.

4.11 There will be a concerted effort to improve public transport infrastructure and to offer better alternative choices to car travel. Walking and cycling into the city centre are growing and measures will be taken to further promote safe and easily followed routes and incorporated in green spaces or waterside routes. A transport hub is proposed at Great Victoria Street.

4.12 The river frontage should be utilised to work, live, travel and play. The protection of existing and the creation of new green spaces and corridors linking the city centre to its surrounding neighbourhoods will be encouraged.

4.13 The city centre will continue to be a safe, inclusive, welcoming meeting point for all age groups, cultures and classes reflecting our vision of an inclusive city.

4.14 This position paper includes analysis of available information on the City's commercial and retail function, with particular emphasis on the City Centre. Below is a summary of the key findings that will help to inform City Centre and Retail policy in the new Belfast LDP and a summary of the key issues that the LDP should address.

Summary of Key Findings and Policy Informants

- Belfast has the largest retailing & commercial office footprint in NI
- Belfast has the largest retail catchment area in NI
- There is a lack of grade A office accommodation
- Higher vacancy rates than other UK regions and highest level of vacant units in NI
- Prime rents on Donegall Place have fallen as retailers choose secondary pitches
- Good representation of independently owned shops and multi-nationals
- Belfast attracts anchor stores and higher end retailers, such as those within Victoria Square
- Significant growth in food and beverage units
- Positive contribution of 'pop up' shops on vacancy
- Changing retailing patterns – rise of 'click and collect'
- Long term vacant retail units have been converted into other uses (offices, restaurants and cafes)
- Recent adoption of SPPS and town first policy
- Consideration of necessity to grow food retailing, grocery and supermarkets
- Potential impact of rateable values 2015 and devolution of corporation tax on vacancy rate

- Potential impact of the ‘Belfast One’ Belfast Improvement District on retailing and the night time economy in Destination Cathedral Quarter
- Requirement for supply of differing units to attract multi-national and smaller independent retailers
- Connectivity, walkability and accessibility improvements required, especially to connect to surrounding neighbourhoods
- Further retailing opportunities exist within the NE Quarter, Inner West area, at the proposed Transport Hub at Great Victoria Street and at Castlecourt Shopping Centre
- Consideration of necessity for leisure uses within the City Centre

Summary of Key Issues to be Addressed in New Plan

- The need to support and strengthen the role of Belfast City Centre as the primary retail location in Northern Ireland.
- Need to maintain the economic strength of the City Centre by protecting from out of town developments
- Need to manage, protect and enhance retail and wider employment offer in City
- Necessity to address vacancy, undeveloped and neglected areas of land
- Opportunity to better connectivity to neighbourhoods and integrate land uses
- Necessity to provide for a range of units/floor space to meet retailers requirements
- Necessity to provide policy to guide investors and decision makers, including defining the retail hierarchy and extent of retail centres
- The need to clearly define what constitutes a City Centre use
- The aspiration to increase residential and employment population;
- The necessity to adapt and manage changing retailing patterns and promote resiliency to market uncertainties (digital shopping trends, growth of food and beverage units and desire for the City Centre as a destination).
- Opportunity to bridge the gap between the daytime and evening economies through managing use.

4.15 The information contained within this topic paper has been used to inform the next stage of the LDP process, the Preferred Options Paper.

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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/Holywood Rd/Upr Newtownards Road Junction
AR02/13 – Holywood 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 – Holywood 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