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Democratic Services Section
Legal and Civic Services Department
Belfast City Council
City Hall
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HYBRID MEETING OF THE CITY GROWTH AND REGENERATION COMMITTEE – ADDITIONAL ITEM AND REPORT TO FOLLOW

Dear Alderman/Councillor,

The above-named Committee will meet both online and in-person in the Lavery Room - City Hall on Wednesday, 8th November, 2023 at 5.15 pm, for the transaction of the business noted below.

You are requested to attend.

Yours faithfully,

John Walsh

Chief Executive

AGENDA:

3. **Regenerating Places and Improving Infrastructure**

   (a) Future City Centre Programme: Revised Framework and Pragma Report (Pages 1 - 38)

5. **Strategic and Operational Issues**

   (c) Approval for a Market at Titanic Belfast (Pages 39 - 40)

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CITY GROWTH AND REGENERATION COMMITTEE

Belfast City Council

Subject:	Future City Centre Programme
Date:	8 November 2023
Reporting Officer:	Cathy Reynolds, Director of City Regeneration & Development
Contact Officer:	Deirdre Kelly, Programme Manager Jamie Uprichard, Business Research and Development Manager Jelena Buick, Business Research and Development Officer Catherine McCormack, Regeneration Project Officer

Restricted Reports

Is this report restricted? **Yes** [ ] **No** [x]

Please indicate the description, as listed in Schedule 6, of the exempt information by virtue of which the council has deemed this report restricted.

Insert number [ ]

1. Information relating to any individual
2. Information likely to reveal the identity of an individual
3. Information relating to the financial or business affairs of any particular person (including the council holding that information)
4. Information in connection with any labour relations matter
5. Information in relation to which a claim to legal professional privilege could be maintained
6. Information showing that the council proposes to (a) to give a notice imposing restrictions on a person; or (b) to make an order or direction
7. Information on any action in relation to the prevention, investigation or prosecution of crime

If Yes, when will the report become unrestricted?

After Committee Decision [ ]
After Council Decision [ ]
Sometime in the future [ ]
Never [ ]

Call-in

Is the decision eligible for Call-in? **Yes** [X] **No** [ ]

1.0	**Purpose of Report/Summary of Main Issues**
1.1	The purpose of this report is to: • Update Members on a refreshed Future City Centre (FCC) Programme based on previous recommendations from a refreshed Pragma Retail and Leisure Performance Strategy, ongoing stakeholder engagement and reflecting programmes, projects and activities underway across a number of inter-related areas. • Seek approval to the proposed objectives and measurement indicators within the revised FCC Programme.
2.0	**Recommendation**
2.1	The Committee is asked to: • Note the contents of the report, including the important role the city centre plays for the wider city and region; the key findings of the refreshed Pragma Retail and Leisure Performance Strategy and updates on programmes of work and activity aligned to these recommendations. • Note the progress in relation to shaping the Future City Centre Programme (FCC) and the updated City Centre governance structures. • Approve the monitoring framework within the revised FCC Programme as attached at Appendix 3 consisting of programme objectives and strategic indicators, noting that regular reports will be brought back to Committee on these measurement indicators. • Note that Belfast does not receive the same level of specific regeneration funding programmes that other UK cities receive for city/town centres and high streets, as referenced below, and that a detailed report on this is to be brought to the SP&R Committee in the near future.
3.0	**Background & Context**
3.1 3.2	Belfast and the city centre remains the economic driver for the region. The Regional Development Strategy 2035 recognises the need to enhance the distinctive role of the City Centre as the regional capital and the focus of administration, commerce, specialised services and cultural amenities. It highlights the need to support and strengthen the distinctive role of Belfast City Centre as the primary retail location in Northern Ireland. The Belfast Local Development Plan highlights that Belfast city centre plays a significant role in the regional economy serving a wide catchment area beyond its plan area boundary. The city centre is also a regional centre for commerce, culture, tourism, recreation, entertainment, learning and employment, contributing £47million in non-domestic district rates (which represents 27% of all Belfast City Council's rates income). City centre jobs represent c33% of all Belfast jobs and 9.6% of all jobs in Northern Ireland. The success of the city as a whole is critically important, although like other UK cities, the city centre is viewed as the showcase for the wider city and the gateway for the

	region, supported by the major transport hubs serving the region. The diversification and inclusive economic growth of the city centre is crucial to Belfast's physical and economic development.
3.3	BCCRIS (Belfast City Centre Regeneration and Investment Strategy), the adopted regeneration policy for the city centre, recognises that the city centre is one of the most important places in the Region. The city centre is a place where investment impact can be maximised, where the majority of our rates are generated (per area) and therefore where momentum can be built to support inclusive growth in Belfast's surrounding neighbourhoods. All communities in Belfast therefore have a direct interest in an inclusive economically thriving city centre. BCCRIS and A Bolder Vision both recognise the importance of connections to communities; this is a key theme throughout and includes both physical connectivity and ensuring that local people feel connected to the centre in a way that allows their full participation in its economic and social life.
3.4	Members will also recall that a report was brought to this Committee in March on the Regeneration Tracker which provided an overview of regeneration and development activity which took place across the city during 2022, as aligned to the Belfast Agenda and the policy areas within BCCRIS, This indicated positive progress across a range of asset classes and noted that in 2021/2022 there was a 2% growth in the rates base arising from additional development, which resulted in additional rates growth of £3.3m every year. However there remain a number of challenges impacting on the city centre including stalled regeneration schemes, poor public realm, limited city centre living, decline of certain high street retailers, lack of targeted regeneration funding programmes, severance with surrounding communities and a range of social issues.
3.5	The City Growth and Regeneration Committee in February 2020, noted the key findings and recommendations of a Retail Analysis, as developed by Pragma Consulting Limited; and the progress in relation to shaping a Future City Centre Programme that cut across various programmes of work and projects associated with regeneration, development, business, investment, cultural and vibrancy activities and operational issues. This included programme strands aligned to the Pragma Retail Analysis and Members had agreed that officers develop the Future City Centre Programme through engagement with city stakeholders. In April 2021, Members of the City Growth and Regeneration Committee received an update report on the Future City Centre Programme in the context of the ongoing challenges caused by the Covid – 19 Pandemic. The Committee noted the ongoing challenges of the city centre and its criticality to the recovery of the wider city and region as well as the need to adopt a multi-faceted approach to the re-imagination and recovery of the city centre.
3.6	The refresh of the Belfast Agenda was launched in April 2021 and continued most recently with the public consultation which closed on 2 October 2023. The city centre and its role in supporting the

	growth ambitions set out in the Belfast Agenda, as well as its importance as a place to visit, live, work and invest in was highlighted by a large no of respondents. On the basis of this feedback from stakeholders and the public as a whole, the Future City Centre has emerged as a priority area within the "Our Place" theme of the Belfast Agenda.
3.7	In response to the emerging city centre issues, during 2022 a review was undertaken of existing mechanisms for engagement and improved governance to bring together the various city centre related facets and ensure synergy whilst avoiding duplication and silo approaches. Members will note this included the establishment of an All-Party Working Group on the City Centre which was approved by the Strategic Policy and Resources Committee on 19 August 2022. The revised FCC Programme is aligned to the agreed city centre governance structures (included in appendix 1) which include: i. **Future City Centre Leadership Group** – a sub-group of the Belfast Agenda City Development Board which focuses on ensuring that issues are raised, and solutions achieved relating to the priorities for the Future City Centre Programme. Membership consists of representatives from a number of partners including BCC, city centre stakeholders including private sector, central government agencies, anchor institutions, Visit Belfast and BIDs and representation from the VCSE panel. ii. **Strategic Leadership Group (Complex Lives)** - A strategic and proactive partnership and multi-agency approach which brings together the NIHE, PHA, the Health and Social Care Board, Probation Board for NI, PSNI and Council, along with voluntary agencies. This is supported by a Multi-Disciplinary Team (MDT) which meet on a weekly basis to understand the specific needs and to develop an individual support plan for the vulnerable person. iii. **Multi Agency Operational (tasking) Group** – this group seeks to address Clean, Green, Inclusive and Safe (CGIS) issues and overseeing the implementation of a CGIS action plan. Membership includes representatives from relevant government departments, PSNI Belfast Chamber, the city's three Business Improvement Districts and the NIHE.
4.0	**Main Report**
4.1	**Refreshed Retail and Leisure Performance Strategy** As referenced above, in 2018/19, Pragma Consulting Ltd were commissioned to undertake a Retail Analysis of Belfast City Centre to identify the challenges facing the city's retail sector and inform recommendations on how retail, leisure and supporting uses could drive the development of Belfast City Centre. This was previously considered by Committee and formed the basis of the Future City Centre Programme referenced above and agreed by Members as a basis for cross cutting themes of work for the city centre. Since then, a number of significant events such as the fire at Bank

	Buildings, Covid – 19 pandemic and global economic crisis have seen an acceleration of a number of trends identified within the report.
4.2	With Covid-19 having the potential for both short and long term change, the Council had recommissioned Pragma to revisit the findings to understand what has changed, and how the Council as an active stakeholder in the city centre, alongside other partners, can affect maximum positive change given the opportunities and resources available. It was recognised that there was a need to consider the purpose and functionality of the city centre and how it can adapt to becoming a multi-purpose location, combining retail and hospitality with business, residential, cultural, community and other facilities alongside new ways of working (hybrid/homeworking) and embracing innovation and digital technology. The key findings and recommendations from this recently refreshed work have informed various interventions, programmes and approaches that have being brought to this Committee for approval and noted to the City Centre All Party Working Group. A summary of key recommendations and an update on actions is attached in Appendix 1.
	Future City Centre Programme
4.3	The Future City Centre Programme, as previously agreed by Members, adopted a pillared approach across various thematic areas of regeneration and connectivity; business and investment; vibrancy and animation; clean green, inclusive and safe. The overall Programme has recently been recast to take into account the significant challenges brought about by the Bank Buildings fire, the Covid-19 pandemic, cost of living crisis and stakeholder feedback, as well as best practice advice and recommendations from external sources inc the refreshed Pragma Report 2022, Institute of Place Management, High Street Task Force etc.
4.4	The ethos of the FCC programme remains. However, this is now strengthened by the collectively (BCC, DfI, DfC and significant stakeholder and public input) developed blueprint for the city centre through A Bolder Vision, with key principles around removing severance and barriers to movement between the centre of Belfast and the surrounding communities to improve access for all; facilitating city centre living; importance of a strong civic spine and enhancing the waterfront. A Bolder Vision embedded within the FCC programme presents a significant opportunity to ensure the restoration of a sense of collective pride in the centre of the city by the communities within and around it.
4.5	The revised and recast FCC framework has been brought about by a comprehensive programme of research and engagement. It reflects feedback from Elected Members of the City-Centre All Party Working Group during meetings held in late 2022 and early 2023. It is also a result of significant inter-departmental working to ensure joint working with all the relevant divisions in the Council, such as Economic Development, Culture, Tourism, Planning, Building Control, Climate, Smart Cities, Property & Projects, City Regeneration and Development, CNS and Strategic Hub.

4.6 The revised FCC Framework (attached in Appendix 2) was adopted by the City Centre All Party Working Group on 08 September 2023. It is aligned to the longer term ambitions of the refreshed Belfast Agenda and Belfast City Centre Regeneration and Investment Strategy (BCCRIS). The revised FCC Framework Vision to create:

"A vibrant, unique and thriving place where people spend time, live, work, visit and invest".

4.7 As set out in the Framework (Appendix 2), this is supported by eight programme objectives, measured by 14 strategic indicators and underpinned by work within five thematic pillars, as below. The programmes of work and activities included in each pillar are not exhaustive and many involve other partners but they are intended to reflect the broad range of activities that are ongoing and are managed and reported via programme and project management arrangements for the various strands:

Regeneration & Connectivity	Business & Investment	Animation & Distinctive Offering	Clean, Green, Inclusive & Safe	Vulnerability
• Major regeneration schemes • BRCD projects including Belfast Stories • City Centre Living / Houseing-led regeneration • Connectivity and Active Travel • Connected spaces & places • Vacant-to-Vibrant capital grant programme • Matchmaking service to address vacancy • A Bolder Vision • Preservation of built heritage • Environmental improvements • Cathedral Gardens redevelopment • Waterfront promenade framework	• Business support programmes • Attracting new-to-market brands • City Investment Service • Business tourism - conference subvention • Night-time economy • Business premises for cultural organisations/ creative industries • Test trading at markets • Positioning the city to compete • Maximising international opportunities in FDI, trade and education • Smart Belfast programme • Belfast Smart District	• 2024 Year of Culture Projects • Cultural animation activities and events, pop-up activities • 2 Royal Avenue programming • UNESCO City of Music/ music strategy implementation • Meanwhile uses • Lighting Interventions • Night-time economy • Food and drink tourism • City Hall exhibition including Augment the City experience • Street dressing/ street art • Annual events programme • City markets • Belfast HUB-IN at Maritime Mile • Belfast Stories visitor attraction	• Enhanced city centre cleansing regimes and tackling graffiti • City centre cleanliness charter • Safer Neighbourhood Officer city centre patrols • ASB Officer advice/guidance • Imagining use of open and civic spaces (support retail/ hospitality sectors). • Support the provision of parklets and greening the city initiatives. • EVC strategy • Tourism Accessibility Programme • Green Tourism Accrediation	• Continue multi-stakeholder approach to support alcohol and drug addiction; and rough sleeping. • Delivery of Complex Lives (whole systems and people-centred approach)

Cross-cutting enablers: Local Development Plan; Digital innovation; Inclusive Growth; Sustainability & Resilience; Development of a robust evidence base providing objective data on the above indicators and measures – to be used to inform the development of future actions; Taking an 'evidence led approach' by utilising best practice and corporate membership of IPM; and Legislation - Reform of licensing

4.8 **Strategic Indicators**

As part of recent engagement, officers have identified a range of strategic indicators (across areas such as footfall, investment, tourism spend etc) as set out in the enclosed Framework which will be used to track the progress of the FCC programme objectives over the longer term. Work is ongoing to collate this data and develop appropriate monitoring mechnisms for all metrics. A technical report has been included at Appendix 4, which provides further information on each of the indictors including its definition, source and performance data. Officers will report progress on these indicators on a regular basis.

4.9 The revised framework also includes performance measures, drawing on Outcomes Based Accountability thinking, whereby the vision, objectives and indicators refer to the population

	accountability for the entire city; and then the “pillars” relate to performance accountability which link to individual workstreams that the council delivers or has a key role in.
4.10	**Funding & Investment in Belfast** While Belfast has experienced strong growth across some sectors there is significant public and private sector investment required to deliver on the outcomes of the Belfast Agenda. Belfast has experienced several years of in-year capital budgets from central government, limiting and removing the ability to deliver the required capital infrastructure investment to support the sustainable, diversification of the city centre. This lack of major Executive capital investment is further compounded when considered in conjunction with the fact that other UK cities are eligible for significant funding directly aligned to city /town centre regeneration that NI cities /towns are not eligible for. These include specific regeneration funding streams available in other UK cities inc the High St Fund, the Better Towns Fund, Brownfield Fund etc and the absence of these dedicated funding streams provides a significant disadvantage to Belfast in terms of competing with other UK & Ireland city/ town centres and High Streets, but also in terms of dealing with, and recovering from economic shocks such as the Pandemic and the cost-of-living crisis. A further report on this will be brought to a future meeting of this Committee and the SP&R Committee.
5.0	**Financial and Resource Implications** The revised Future City Centre Programme only identifies existing programmes and workstreams that are already covered from existing budgets. As highlighted above, non-domestic district rates from the city centre contributes £47 million or 27% of the council’s total rates income.
6.0	**Equality or Good Relations Implications/Rural Needs Assessment** Each workstream and/or programme and project will be separately equality screened as per our statutory requirements.
7.0	**Appendices - Documents Attached**
	Appendix 1 – Pragma Key recommendations and update on actions Appendix 2 - Revised Future City Centre Programme Framework Appendix 3 - Future City Centre Indicator Technical Report

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Pragma Report 2022:

Background & Recommendations

Following a previous (2018) Retail and Leisure Performance and Strategy developed by Pragma for Belfast City Council, and in light of the rapidly changing environment during, and following, the Covid-19 Pandemic, Pragma recently undertook a further review of this Retail & Leisure Performance Assessment and the performance of the city centre. They outlined a number of high-level recommendations to address the changing challenges and opportunities that impact on the city centre to help ensure that Belfast offers a dynamic and experiential destination for visitors and residents.

The Key Findings are outlined below.

1. **Catchment and footfall:** Post pandemic, Belfast's footfall recovered faster than other UK cities but still remain below the 2019 levels. The opening of the Ulster University Campus has been the largest factor in the increase of footfall however dwell times in parts of the city were down impacting spend and vibrancy.
2. **City Centre Provision:** Despite lockdowns, a growth in online shopping and the loss of several major brands, the city centre has seen continued transition with a number of new retail outlets (Anthropologie, Rolex, Gucci etc) and a number of new leisure outlets (The Avenue Cinema, 2 Royal Avenue).
3. **Vacancy:** Vacancy rates reached approx. 25% in 2021 and were significantly higher than the UK average of 14.5%. However, this rate improved in 2023 to 21% as a result of new entrants to the market and the Council's Vacant to Vibrant scheme. It should be noted that Belfast's vacancy rate is heavily influenced by those vacancies which are considered 'persistent' and associated with stalled regeneration schemes, many of which have panning but have yet to progress.
4. **City Centre Performance:** Belfast city centre's catchment gap has increased from £55m in 2018 to £122m in 2021 as it accounts for lost shoppers during the pandemic. The degree to which this gap can be realised will be dependent on the strength of the offer Belfast can provide.
5. **Key Trends:** A demand still exists for bricks and mortar shopping and leisure experiences. As habits change from purchase-driven to experience-driven, the hosting and marketing of varied, quality events are a key enabler in driving visits.
6. **Independents** in Belfast city centre as a proportion of total retail units has increased from 51% in 2018 to 57% in 2021.

7. **Physical environment** of the city needs to be improved in order to attract brands e.g. investments/interventions to the public realm, premium signage and wayfinding, improving the cleanliness of the city, and improving the appearance of vacant units.
8. **2 Royal Avenue:** as part of the FCC, direct control of this key asset presents opportunities for Council to secure a regular market rent and/or funding. The upsurge of interest from retail and leisure occupiers in the space in Royal Avenue and Donegall Place would indicate a commercial use should play a role in the buildings asset strategy to enable further investments made by Council in testing space in the city centre for a variety of uses.

Recommendations

Pragma outlined a number of high-level recommendations and opportunities to address these challenges and to ensure the retail sector offers a dynamic and experiential destination for visitors and residents.

1. **City Centre Living:** A vital element in driving city centre performance is building sustainable and balanced communities within the city centre itself. A diverse mix of quality accommodation will be required to generate multigenerational city living, requiring residential-led regeneration of parts of the city centre. Successfully realising this aim will require connecting communities, so no one is left behind, through SMART placemaking principles objectives and the delivery of A Bolder Vision which necessary to build thriving city centre communities.

   Update on Actions:

   Promoting City Centre Living through the lens of A Bolder Vision and via the following key aspects;

   - Strategic Site Assessments including concept regeneration plans to maximise the potential of area-based interventions brought through to PAD stage
   - SSA Phase 1 resulting in the recent launch of a Competitive Dialogue process seeking a developer/ investor partner to take forward housing led regeneration at scale.
   - Progressing the Inner North West Development Brief for BCC and DfC lands as recently reported to Committee September 2023.

- Work is ongoing in respect of other Council owned lands within the city centre for potential housing led regeneration (including Dunbar Link, Seymour House, Ravenhill Reach etc) , as well as lands outside the core city centre .
- Continued partnership working through the Housing Led Regeneration Group under community planning with other public sector bodies for other city centre opportunities.
- Planning system and LDP process, a number of planning approvals and applications underway inc those as reported to CG&R in March with the Regeneration Tracker Update; inc 94 social & affordable units at Gasworks Northern Fringe lands, 48 social & affordable units in College Sq North, the commencement of the mixed tenure Loft Lines scheme which will see a significant acceleration in city centre /TQ with 778 residential development including 151 social and affordable housing and planning submitted for 70 social and affordable units in Sailortown.

2. **Environmental quality:** To both facilitate city centre living in the long-term and improve city centre performance in the short-term, improvements to the quality of environment in the city centre are required. These measures should include strategies for enhanced cleansing, improving the appearance of vacant units, encouraging community engagement through hosting events and improving wayfinding and the public realm. Increased pedestrianisation would bring significant improvements to the quality of the city centre environment, creating opportunities for much-needed green and open spaces.

Update on Actions:

- Clean Green Inclusive & Safe: Delivery on the CGIS Action Plan under revised governance. Council have delivered new on-street recycling bins, brought in more resources in staff and machinery to maintain cleaning standards and are working with commercial premises on how best to present bins for collection to help keep streets tidy and clear from obstacles, and prevent litter build-up. Partnership working with the three BIDs who are also supporting Council cleansing schedules with additional resources in high footfall areas and a public consultation will open this autumn on bye-laws to address noise and other issues.
- A Bolder Vision Update: seeking final agreement on overall ABV & Action Plan to ensure effective design of public spaces focused on providing people places, and to inform and direct the Eastern Transport Plan to ensure reducing the severance

to communities, while promoting city centre living and addressing the Climate Emergency

- On going delivery of quality public realm and better use of space through The Entries Programme, tactical regeneration in Great Victoria St; utilising developer contributions for catalyst public realm schemes including 5Cs, Little York Street / Little Patrick Street and Blackstaff Square; the implementation of Pavement Café licences; Note that significant environmental and public realm improvements including Belfast Streets Ahead 3 and 5 are undergoing review pending the outcome of the Eastern Transport Plan and multi-year budgets to enable delivery..
- Events and programming provide a major element of the fabric of the Belfast Environment and includes rolling events programme including at seasonal peak times such as St Patricks Day, Easter and Christmas; the attainment of UNESCO City of Music status, and the recent hosting of One Young World Conference and the pending 2024 Programme all contribute to the vibrancy and attractiveness of Belfast. Members will note update on Committee Plan in respect of the Council delivered events but also the work alongside partners including the Business Improvement Districts.

3. **Governance**: Despite the Council facing limitations in its ability to facilitate change, it has taken a lead role in the formation of the Future City Centre Programme, which sets out the good work the Council are undertaking in the city centre, from small scale changes in tactical regeneration to the targeted acquisitions. However, there is a need for Council, alongside wider public sector and other partners and stakeholders to press forward with plans for investment and regeneration, which could include the Council (or other public sector bodies) actively investing in further key strategic sites to directly facilitate change and improvement, enable city centre living through residential-led development and implement A Bolder Vision to ensure connectivity and environmental needs are met.

Update on Actions:

- City Centre governance approved by SP&R in August 2022, including the establishment of an All-Party Working Group for the City Centre (governance schematic attached at Appendix 1).
- Update as per recommendation 1 on A Bolder Vision and city centre living including BCC taking a leading role on bringing forward significant investment at scale

through the Launch of the Competitive Dialogue process to seek an investment/development partner to deliver Housing Led Regeneration

- Targeted strategic acquisitions by Council of a number of historical city assets and strategic sites including;
  - 2 Royal Avenue to provide a culturally significant hub in the city centre;
  - the Belfast Region City Deal flagship Belfast Stories on Royal Avenue,
  - lands at Corporation Street for housing led regeneration,
  - Commission House as part of the Dunbar Link,
  - former Belfast Telegraph building as part of a Joint Venture

    .

4. **Long term opportunities**: Potential interventions available to the Council (and other public sector bodies/partners) include long-term, substantive interventions including investments in environment, subsidies and direct investment in property. Around these, tactical interventions such as marketing and events have the potential to drive more immediate improvements to environment, perceptions and performance. Noting also that Council have a role in promoting, influencing and shaping wider public and private sector investment aligned to the FCC Update.

Update on Actions

- Progress with Belfast Stories via BRCD – site secured, design delivery teams to be announced shortly.
- Strategic Targeted Acquisition as per update at recommendation 3.
- Delivery of events and programming as per update at recommendation 2.
- Delivery of opportunities through the Innovation City Belfast and Council's Innovation team ongoing.
- Delivery significant game changers such as
  - Belfast Region City Deal Programme & Projects
  - Transport Hub and the wider Weavers Cross scheme ongoing with the Transport Hub under construction and a development partner appointed for WX,
  - Waterfront development prioritised through the Waterfront Promenade Framework as agreed through Council in October 23,
  - Unlocking other major regeneration & development schemes within the city centre noting the 2022 Belfast Regeneration Tracker update provided to Committee in March 2023.

- Major Tourism & Events inc 2024 Programme

- Lobbying work in progress for equity of specific regeneration funding inc city/town centre and High St funding, acknowledging the disparity of funding applied to other UK cities that do not apply to NI eg High St Fund, Better Towns Fund, fully funded High Street Task Force etc. If funded in this Region, this would act as a strong catalyst for the regeneration of the high street, increase city competitiveness and support sustainable businesses growth.

5. **City Centre Performance**: Belfast city centre needs to provide a compelling reason to visit. This can be delivered by providing first to market and first to island retail brands, leisure pursuits and experiences that are, if not world class, then significantly better or unique to that than can be found elsewhere in Ireland. Other key recommendations include direct investment in properties by the Council to create opportunities for the Council to directly influence the attraction of first to island and leisure brands, the implementation of the Bolder Vision and targeted support for independent brands through the provision of subsidies, support and grants to businesses to cultivate the city centers offer.

   Update on Actions:

   - Vacant to Vibrant scheme ongoing to support local SME's & independent retailers to establish unique offerings within vacant units as point 7.
   - notable new retail additions within the city centre including first to region and first to island brands including Anthropologie, Mint Velvet and Vans
   - The delivery of new leisure /cultural uses such as 2RA, The Avenue Cinema (Castlecourt) and note the anecdotal summary provided by the Match Making Agent under the Vacant to Vibrant report which is being presented to Members on a separate Agenda item.

6. **Compelling reasons to visit:** Belfast city centre needs to provide a compelling reason to visit. This can be delivered by providing first to market and first to island retail brands, leisure pursuits and experiences that are, if not world class, then significantly better than can be found elsewhere in UK/Ireland.

   Update on actions: as above in point 2 and 5 and also the landmark Belfast Stories tourism led regeneration project via the BRCD.

7. **Supporting Independents:** Targeted support for independent brands through the provision of subsidies and grants to businesses provides a route for the Council to support and cultivate the city centres offer. The need to ensure complete fairness and transparency in the awards of grants is clear, but the Council must ensure tangible action is delivered off the back of such schemes.

   Update on Actions:

   - Council's Vacant to Vibrant Pilot Capital Grant Scheme is currently open with up to 15 independent traders/SME's or cultural organisations supported to date to take up vacant space in the city centre, providing employment, vibrancy, activation of vacant space and animation. Note detailed update is provided to this Committee Meeting on a separate agenda item.
   - On going high demand and support for Council managed Markets at St Georges and Smithfield.
   - Ongoing support for business through the Go For It programme.

8. **Creating an investable proposition**: Extending trading hours, improving the streetscape, optimising connectivity between areas and attractions, being creative with space and ensuring the city is a safe, navigable and pleasant place to be will all help strengthen the city's position to recover and grown shopping numbers.

   Update on Actions:

   - Strong city marketing and communications continues to be rolled out for specific programmes and projects and a new Marketing & Comms plan is to be developed alongside Corporate Communications to amplify the positive stories and messaging, working also with city partners.
   - Invest in Belfast website developed and an Investment Prospectus highlighting opportunities for investment.

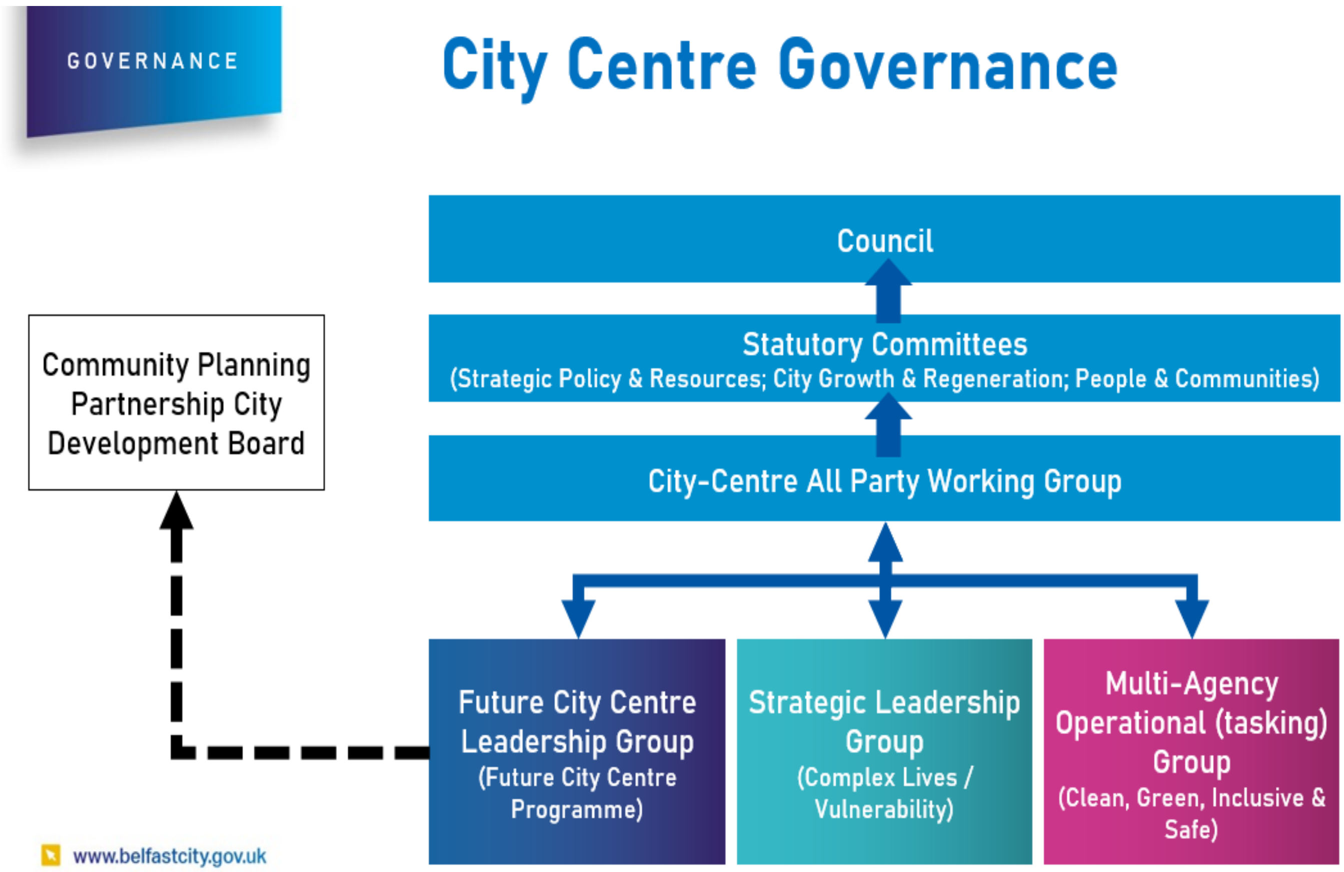
9. **Infrastructure and Connectivity**: It is important for the future of a thriving city centre that A Bolder Vision is fully implemented, as it will provide for the delivery of key infrastructure and regeneration projects including major capital investment schemes such as Belfast Streets Ahead Phases 3 and 5, Belfast Rapid Transit Phase 2 and the Inner Ring Road Gateway Public Realm schemes, as well as establishing a longer-term capital and policy prioritisation to help to inform the development and integration of prioritised sustainable and active travel in the city centre. An agreed joint working

structure between statutory and city partners would enable a more agile approach in terms of decision making on the funding, delivery mechanisms, implementation and management of ABV projects, programmes and interventions.

Update on Actions:

- A Bolder Vision Update as per previous points including noting that major infrastructure and connectivity are significantly important for Belfast's continued growth, but powers and funding for the delivery of these rest outside of Council. The lack of multi-year budgets and the absence of up-to-date Transport Planning has limited the ability to deliver capital infrastructure of scale to improve the landscape and provision of quality infrastructure of the city. This is further compounded when considered in conjunction with the disparity of regeneration funding applied to Belfast City Centre as other UK Towns and Cities as point 4 of this report. Further work is required to enable the delivery of multi-year budgets along with the provision of parity of funding with other UK Towns and Cities.
- Further work is required to update the Metropolitan Transport Plan

Appendix 1B – City Centre Governance Schematic



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FUTURE CITY CENTRE PROGRAMME

Vision

A vibrant, unique and thriving place where people spend time, live, work, visit and invest.

Programme objectives

- Increase footfall levels, dwell time and consumer spend through a unique retail mix and leisure experience which creates more reasons visit the city centre.
- Increase visitors to the city from beyond the council boundary through the development of a unique cultural offer, use of the riverfront and vibrant night-time economy.
- Ensure that the city centre is connected and accessible to facilitate travel from neighbouring communities and those from outside Belfast
- Create a lively, clean, green, attractive and safe city centre to welcome people of all ages and backgrounds.
- Increase the number of people living in the city centre through housing-led regeneration.
- Tackle rough sleeping by addressing the complex needs of vulnerable individuals.
- Sustain existing and attract new businesses to the city centre to increase the number of employee jobs.
- Build on our reputation as a unique destination for investment, innovation, tourism and development.

Strategic indicators

- ✓ Footfall levels
- ✓ Dwell time
- ✓ Number of unique visitors
- ✓ Catchment area (visits from areas outside the city)
- ✓ Rates income (domestic/non-domestic rates)
- ✓ Perception of cleanliness and safety
- ✓ Air quality within the city centre
- ✓ Number of employee jobs within the city centre
- ✓ Value of development (Regeneration tracker)
- ✓ Vacancy rate (number of vacant properties)
- ✓ Independent retailers (number and proportion of all retailers)
- ✓ Consumer spend (retail and leisure sales)
- ✓ Value of tourism
- ✓ City centre living population

Programme pillars

Short, medium and long-term workstreams / actions

Regeneration and connectivity	Business and investment proposition	Animation and distinctive offering	Clean, Green, Inclusive & Safe	Vulnerability
• Major regeneration schemes • BRCD Projects including Belfast Stories • City Centre Living / Housing-led regeneration • Connectivity and Active Travel • Connected spaces and places • Vacant-to-Vibrant capital grant programme • Matchmaking service to address vacancy • A Bolder Vision • Preservation of built heritage • Environmental improvements • Cathedral Gardens redevelopment • Waterfront promenade framework	• Business support programmes • Attracting new-to-market brands • City Investment Service • Business tourism - conference subvention • Night-time economy • Business premises for cultural organisations and creative industries • Test trading at markets • Positioning the city to compete • Maximising international opportunities in FDI, trade and education • Smart Belfast programme • Belfast Smart District	• 2024 Year of Culture programme • Cultural animation activities and events, pop-up activities • 2 Royal Avenue programming • UNESCO City of Music / Music strategy implementation • Meanwhile uses • Lighting interventions • Night-time economy • Food and drink tourism • City Hall exhibition including Augment the City expanded reality experience • Street dressing and street art • Annual events programme • Bids for major events • City markets • Belfast HUB-IN at Maritime Mile • Belfast Stories visitor attraction	• Enhanced city centre cleansing regimes and consideration of approach to tackling graffiti • City centre cleanliness charter • Tackling dereliction • Safer Neighbourhood Officer city centre patrols • ASB Officer advice and guidance • Imagining use of open and civic spaces (particularly to support retail/ hospitality sectors) • Support the provision of parklets and greening the city initiatives including Grey-to-green • EVC strategy • Tourism Accessibility Programme • Green Tourism Accreditation	• Continue multi-stakeholder approach to support alcohol and drug addiction • Continue multi-stakeholder approach to address rough sleeping • Delivery of Complex Lives (whole systems and people-centered approach)

Operational performance measures				
• Number of residential units / city centre residents • Number of residential units under construction / planning applications granted / competed • Number of PBMSA units under construction / planning applications granted / completed • Number of journeys into the city centre by sustainable transport • Glider usage / passenger numbers • Modal shift away from private cars • Vacant units / persistent vacancy / vacancy rate • Number of heritage assets on Heritage at Risk NI (HARNI) Register	• Number of new companies supported in the city centre • Number and levels of investment • Investors supported / engaged • Employee jobs in city centre	• Footfall metrics • Demographics of visitors • Purple flag accreditation • Tourism visitors (overnight stays) • Average stay per visitor (duration) • Hotel occupancy rates • Visitors' perception/ satisfaction • Audience numbers and geography • Retail proposition • Attendance at arts / cultural events • Belfast Residents Survey capturing perception of satisfaction with city living • New to market brands (including retail, leisure etc.)	• Cleanliness index • Satisfaction/perception of cleanliness • Vacant and derelict sites • Perception of safety in city centre – during the day and after dark (by different groupings) • Crime statistics (including hate crime) • ASB incidents (within city centre) • Alcohol enforcement • Perception that city centre is shared (by different groupings) • Air quality within the city centre • Number / usage of parks or green spaces within city centre • Number of businesses with Green Tourism accreditation • Accessibility baselines	• Chronic homelessness / rough sleeper count • Drug overdoses • Numbers receiving alcohol/ drug addiction support

Cross-cutting enablers

- Local Development Plan
- Digital innovation
- Inclusive growth
- Sustainability and resilience
- Development of a robust evidence base providing objective data on the above indicators and measures – to be used to inform the development of future actions.
- Taking an 'evidence led approach' by adopting best practice and corporate membership of IPM
- Legislation - reform of licensing

Future City Centre Programme Strategic Indicators

Technical Report

Document Date: Wednesday 01 November 2023

Indicator	Data availability/ source	Frequency	Most recent year	Geography coverage	S75 group coverage
Footfall levels	Terain by Visitor insights Springboard	Monthly Weekly	2023 2023	City centre designated area[1] Primary Retail Core[2]	Yes (Age and gender) No
Dwell Time	Terain by Visitor insights	Monthly	2023	City centre designated area[1]	Yes (Age and gender)
Visitor Numbers	Community Vision by Huq	Monthly	2023	City centre designated area[1]	No
Catchment area	Terain by Visitor insights	Monthly	2023	City centre designated area[1]	Yes (Age and gender)
Rates income	LPS Valuation List	Annual	2022-23	City centre (BMAP)[3]	n/a
Perception of cleanliness and safety	Belfast City Council CGIS Survey	Ad hoc	2021	City centre (BMAP)[3]	Yes (Age, gender, disability, community background)
Air quality	Air Quality NI website, Department of Agriculture, Environment and Rural Affairs	Daily	2022	Lombard Street monitoring station	n/a
Employee jobs	DfC Town Centre Database	Biennial	2021	City centre (BMAP)[3]	Yes (Gender)
Value of development	Belfast City Council Regeneration Tracker	Annual	2022	City centre (BMAP)[3]	n/a
Vacancy rate	Belfast Retail Study	Annual	2023	Primary Retail core[2]	n/a
Independent retailers	DATA DEVELOPMENT (Belfast Retail Study)	Annual	-	Primary Retail core[2]	No
Consumer spend	DATA DEVELOPMENT	-	-	-	No
Value of tourism	NISRA Tourism Statistics Branch	Annual	2019	Citywide	No
City centre living population	DATA DEVELOPMENT (NISRA Mid Year Population Estimates for Small Areas)	Annual	2020	Selection of small areas approximate to City centre (BMAP)[3]	No

Introduction

A Retail Analysis of Belfast City Centre in 2018 by Pragma Cosulting identified a number of challenges and opportunities to embrace current and future trends to address the shortcomings in the existing retail offer. In response, officers developed the Future City Centre (FCC) Programme which aimed to create a dynamic and experiential destination for shoppers and bolster Belfast as NI's dominant retail and leisure destination.

Following the significant challenges brought about by the Bank Buildings fire, the Covid-19 pandemic and the cost of living crisis the FCC Programme was revised and reflects cross-departmental engagement within council and further feedback from partners and elected members. The revised framework aligns to the strategic objectives of the refreshed Belfast Agenda and the Belfast City Centre Regeneration and Investment Strategy framework being recast to help address the issues impacting on the city centre.

A total of 14 strategic indicators have been indentified to measure success and track progress towards the vision and objectives over the longer term. Further information on each indicator is enclosed below. This includes a definition of each indicator, data source(s) and the availability of data, the relevant geography and frequency of data collection. Where available, initial trend data has also been included. It should be noted however that some indicators remain data development areas, where further work is required to develop monitoring mechnisms to capture, record and report the relevant data.

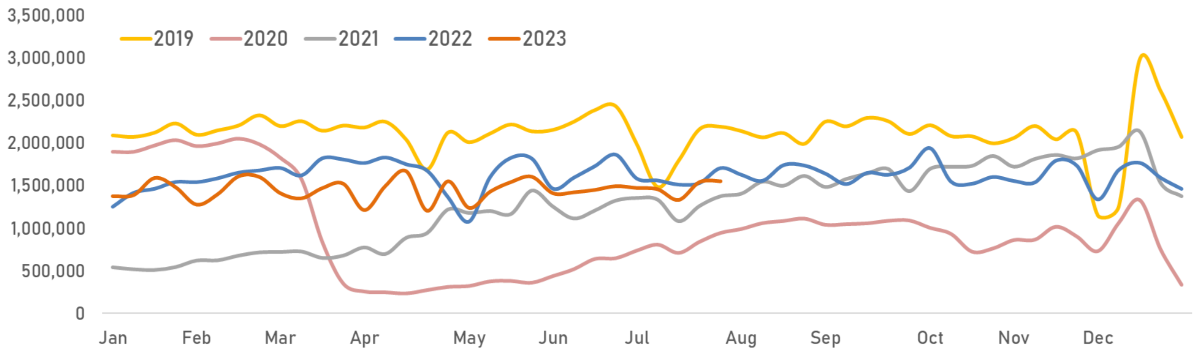
Strategic Indicators

1. Footfall Levels

Definition: The number of people passing a fixed point or entering a geofence related to a city centre location/ area on a weekly/monthly basis. Dwell time refers to the total time (minutes) that the visitor stays within the city centre area.

Baseline Position: There were 5.6m visits to Belfast city centre during Sep 2023. This is down 19.8% Year-on-Year when compared with Sep 2022 In the year to date, there is an average of 206,000 visits per day.

Performance Data:



Data source(s):	Terain by Visitor insights; and Springboard
Geographical coverage:	City centre designated area[1]; and Primary retail core[2],
Frequency of data collection:	Monthly; and Weekly
Further information:	Footfall figures provide a measurement of vibrancy or activity. While it is related to the number of people visiting the city centre, it often includes double-counting where the same individual passes a fixed-location camera which provides the count. The Terain system uses AI technology with data obtained from GPS enabled devices and can be combined with Experian datasets to provide additional socio-economic information related to Age, Gender, Qualification & Income breakdowns.
S75 Breakdowns:	The Terain system reports footfall broken down by age and gender.

Insights: While footfall has recovered since the Covid Pandemic, it is still behind 2019 levels.

Almost a fifth (19%) of visits are from young people aged 14 years and under.

The peak footfall hour for weekdays is 11am and 2pm for weekends.

During September 2023, Saturday footfall is almost double that of Sundays. (248k compared with 128k).

Footfall within the Primary Retail Core (year to date) is up 10.9% on the previous year.

[1] The red boundary refers to the City Centre designated area

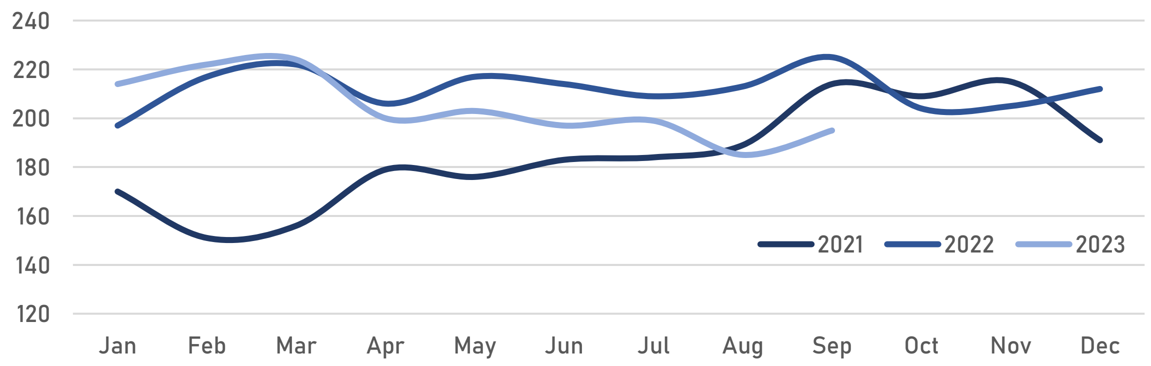
[2] The red dots refer to the six fixed-location cameras in the Primary Retail Core.

2. Dwell Time

Definition:.The average amount of time that visitors stay within Belfast City Centre.

Baseline Position: In September 2023, the average time spent in Belfast City Centre was 195 minutes, down 15.4% from the previous year (September 2022 - 225 minutes). The average dwell time for the year to date is 204 minutes.

Performance Data:



Data source(s):	Terain by Visitor insights
Geographical coverage:	City centre designated area[1]
Frequency of data collection:	Monthly
Further information:	Evidence suggests people's experience when they visit a city centre, as well as who they visit with, determines the amount of time spent (dwell time) and how much they spend. Recent studies and observations of people's experiences suggest that visiting a city centre as part of a group (two or more people) can boost expenditure by as much as 50%.
S75 Breakdowns:	None

Insights: The majority of visits to Belfast City Centre last less than 15minutes (26.3% of all visits) or more than 300 minutes (29.6% of all visits).

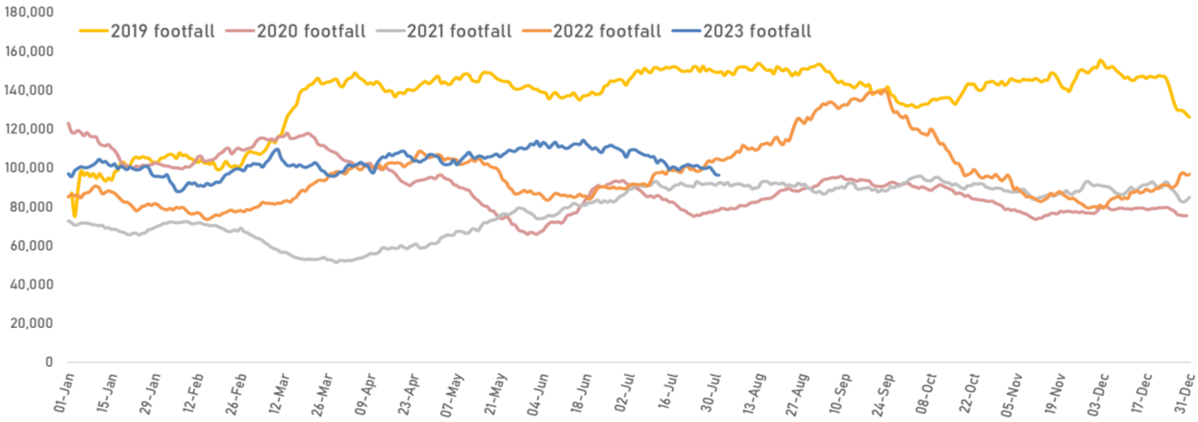
In September 2023, 60% of all visits to Belfast City Centre lasted at least 1 hour.

3. Unique Visitors

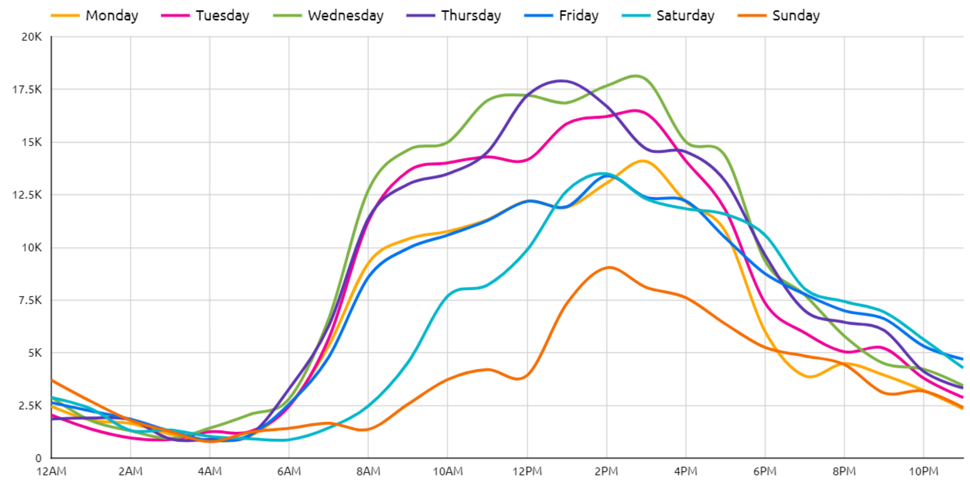
Definition: .The number of people (unique individuals) visiting Belfast City Centre.

Baseline Position: There are an average of 102,644 monthly visitors to Belfast (2023 YTD); an increase from 78,656 in 2021, but down from 135,873 in 2019.

Performance Data:



Data source:	Community Vision by Huq
Geographical coverage:	City centre designated area[1]
Frequency of data collection:	Monthly
Further information:	The Huq system utilises GPS technology to capture, record and report unique visitors to thecity centre designated area (shown in the map below). The number of unique visitors does not include any double-counting and reflects the actual number of people visiting the city centre. Total figures can be broken down on a daily and hourly basis. Granular data can also be plotted on a heat map of the city to show where the majority of visitors are spending most time.
S75 Breakdowns:	None (although information can be broken down by high/medium and low earners).



Insights: Hybrid working has had an impact on the city centre's busiest days and times. Tuesday, Wednesdays and Thursday attract the most people, whereas Mondays and Fridays are the least popular week-days.

Visitor numbers during the day are approximately 200% higher than during the evening hours (6pm-6am).

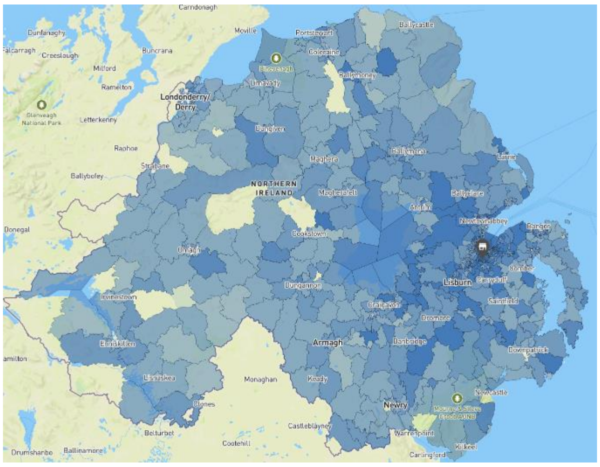
4.Catchment Area

Definition: The total visitor numbers from the top 50 Super Output Areas based on the visitor's home location (Super Output Area) and their cumulative distance from Belfast City Centre.

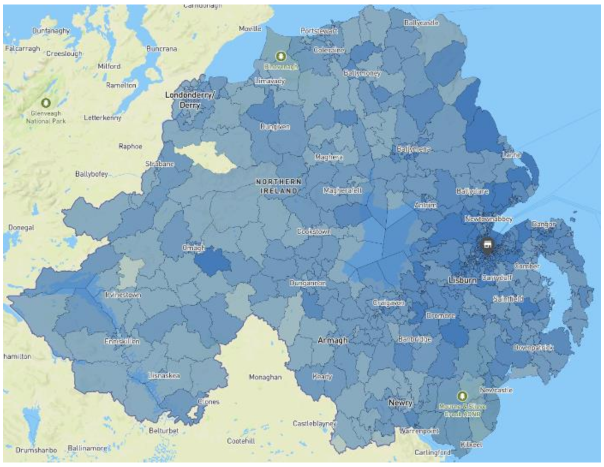
Baseline Position: In 2023 (year to date) the top 50 Super Output Areas (based on visitors home location) was responsible for 16.4 million visits from a total distance of 268km. In 2019, the top 50 SOAs accounted for 36.8 million visits from a total distance of 383km.

Performance Data:

2019



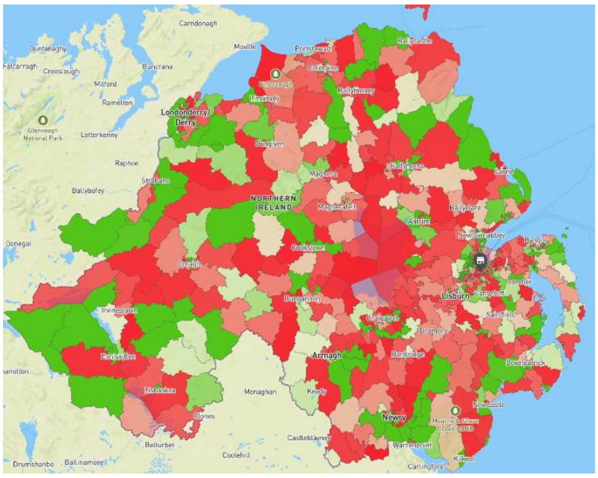
2023



Data source(s):	Terain by Visitor insights
Geographical coverage:	City centre designated area[1]
Frequency of data collection:	Monthly
Further information:	The AI technology and GPS methodology of Terain enables the visitor's home location to be computed. Total visitor numbers are then aggregated and reported at a super output area level as a thematic map. This helps to identify the city's 'core' catchment area – the darker areas of the map. Darker blue Super Output Areas (SOAs) indicate a high volume of visitors reside there, whereas lighter blue SOAs indicte a lower volume of visitors
S75 Breakdowns:	None

Insights: Analysis of Belfast's catchment areas in 2019 and 2023 show little change in reach however there are less visits from areas furtherst from the city centre. Visitors from the wider catchment will typically have higher spend per visit, suggesting consumer spend isn't being mximised.

The map to the right shows catchment change between 2019 and 2023, with the red areas signifying less visitors from that area.

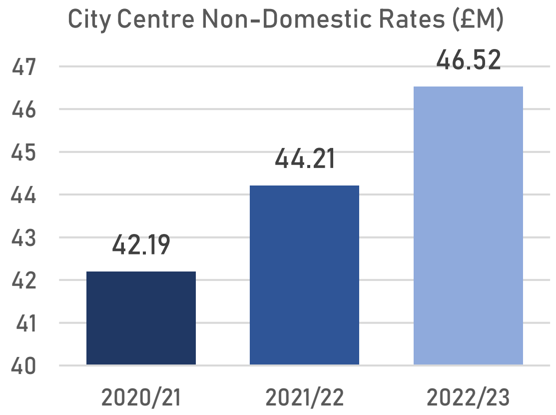


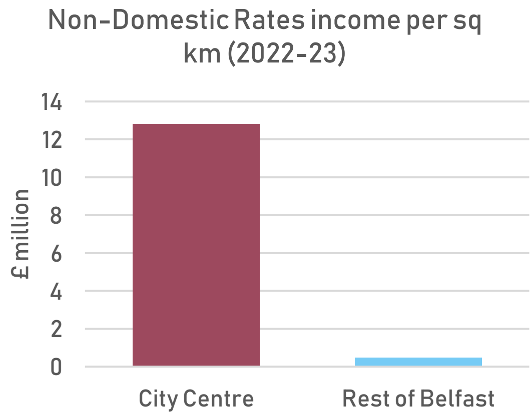
5. Rates Income

Definition: .The total value of domestic and non-domestic rates arising from city centre properties.

Baseline Position: There are an average of 102,644 monthly visitors to Belfast (2023 YTD); an increase from 78,656 in 2021, but down from 135,873 in 2019.

Performance Data:

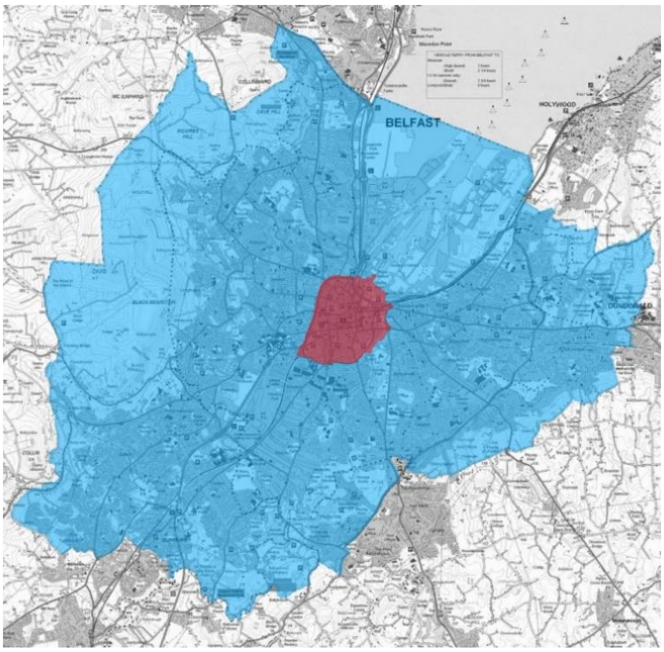




Data source(s):	LPS Valuation List
Geographical coverage:	City Centre (BMAP)[3]
Frequency of data collection:	Annual
Further information:	Domestic rates for the city centre are currently not available due to the format that this dataset is received from LPS. This remains a data development area and we are working in partnership to enable this reporting.
S75 Breakdowns:	N/A

Insights: In 2022-23, the council received £173m in district rates income. The majority (64%) of this comes from non-domestic rates. £47million (42%) of all non-domestic rates comes from city-centre based businesses. The small City Centre boundary (red area in the map) provides £12.8m of non-domestic rates per sq km - over 25 times the rate provided by the rest of Belfast.

Office accommodation provides 58.8% of all city centre non-domestic rates; followed by retail (22.5%); licensed accommodation (4.4%); and licensed premises (3.7%).



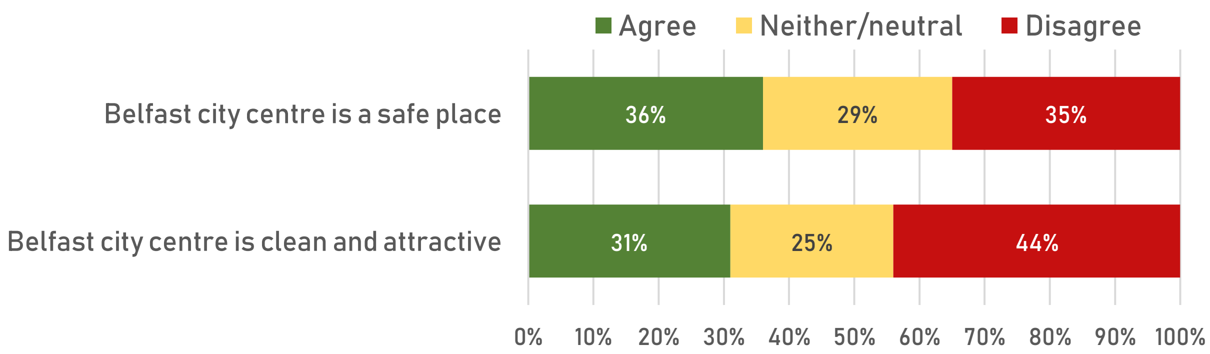
[3] The red shaded polygon represents the Belfast Metropolitan Area Plan City Centre area. The wider blue polygon represents the entire council boundary for context.

6. Perception of cleanliness and safety

Definition: .Public percetion that the city centre is safe (during the day at after dark) and clean. Survey respondents who agreed that Belfast city centre is a) a safe place and b) clean and attractive.

Baseline Position: 31 of survey respondents agreed that Belfast City Centre is a safe place; and 36% agreed that Belfast City Centre is clean and attractive.

Performance Data:



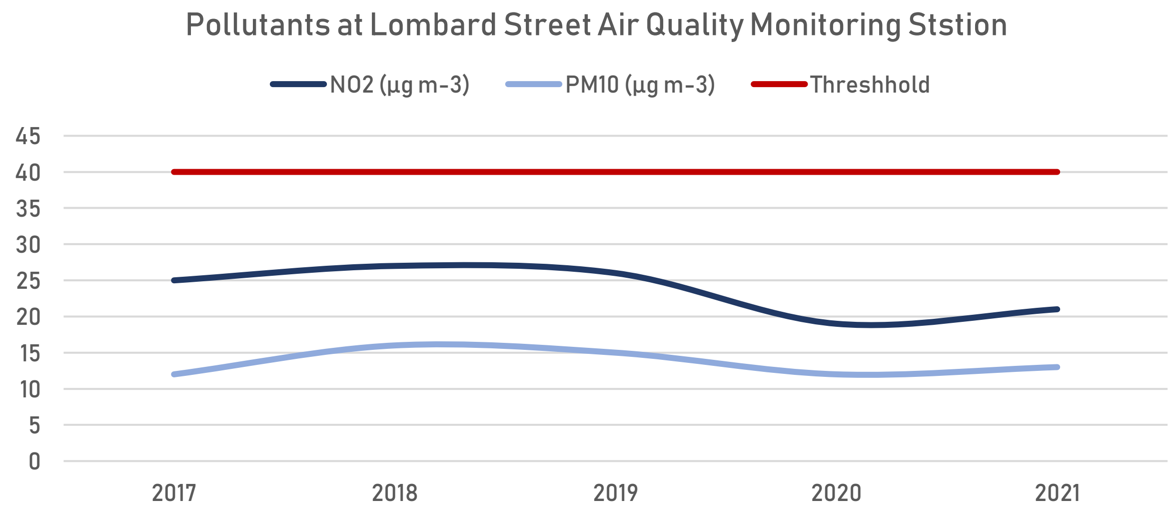
Data source(s):	Clean, Green, Inclusive and Safe Survey (undertaken by Belfast City Council)
Geographical coverage:	City Centre (BMAP)[3]
Frequency of data collection:	Ad hoc
Further information:	Fieldwork for the initial baseline survey was undertaken between 31 March and 14 May 2021. The results were reported at the end of May 2021 and informed the development of the Clean, Green, Inclusive and Safe Action Plan. The survey had 509 respondents. The survey instrument has been replicated using the council's engagement platform, Your Say Belfast and it is proposed that it is repeated on an annual or biennial basis. Additional measures of "feeling of safety" in the city centre re cptures in Belfast City Council's Residents Survey.
S75 Breakdowns:	Age, Gender, Disability, Race, Community background, Sexual Orientation (Proposed)

7. Air Quality

Definition: . Annual mean concentration of nitrogen dioxide [NO2] (μg/m³) and Particulate Matter [PM10] (μg/m³) at the city centre monitoring station in Lombard Street.

Baseline Position: The City Centre monitoring sites at Lombard Street measured NO_2 annual mean concentration of 21μg/m^3 in 2021, below the 40μg/m^3 threshhold. Particulate Matter was measured at 13μg/m^3 (again below the target threshhold).

Performance Data:



Data source(s):	Air Quality NI website, Department of Agriculture, Environment and Rural Affairs
Geographical coverage:	City Centre air pollution station at Lombard Street
Frequency of data collection:	Daily
Further information:	Air pollution results from the introduction of a range of substances into the atmosphere from a wide variety of sources. It can cause both short term and long term effects on health, and also has impacts on the wider environment. Government statistics estimate that air pollution in the UK reduces the life expectancy of every person by an average of 7-8 months, with an associated cost of up to £20 billion each year. Nitrogen oxides (NOx) are a group of gases that are predominantly formed during the combustion of fossil fuels. Nitrogen dioxide has a variety of environmental and health impacts. It is a respiratory irritant which may exacerbate asthma and possibly increase susceptibility to infections. The main sources of NOx are road transport, energy generation, domestic and industrial combustion and 'other' transport such as rail and shipping. The monitoring threshold is 40. Information on Particulate Matter is also available, which reports everything in the air that isn't a gas, a suspension of particles which are solid, liquid or somewhere in between. It can come from natural sources such as pollen or sea spray, and human made sources such as smoke from fires, soot from vehicle exhausts, dust from tyres and brakes, as well as emissions from industry.
S75 Breakdowns:	N/A

8. Number of employee jobs

Definition: .

Baseline Position: There were 85,802 employee jobs in Belfast City Centre in 2021, an 11% increase from 2015.

Performance Data:

Data source(s):	Department for Communities' Town Centre Database / The Business Register and Employment Survey (BRES)
Geographical coverage:	City Centre (BMAP)[3]
Frequency of data collection:	Biennial (Every 2 years)
Further information:	NISRA is legislatively required not to disclose the identity of an individual or individual organisation in its statistical outputs. Reporting of such data at a granular geographic area therefore requires a large sample size and is undertaken every other year.
S75 Breakdowns:	No. Jobs are broken down by Standard Industrial Classification (SIC) Section.

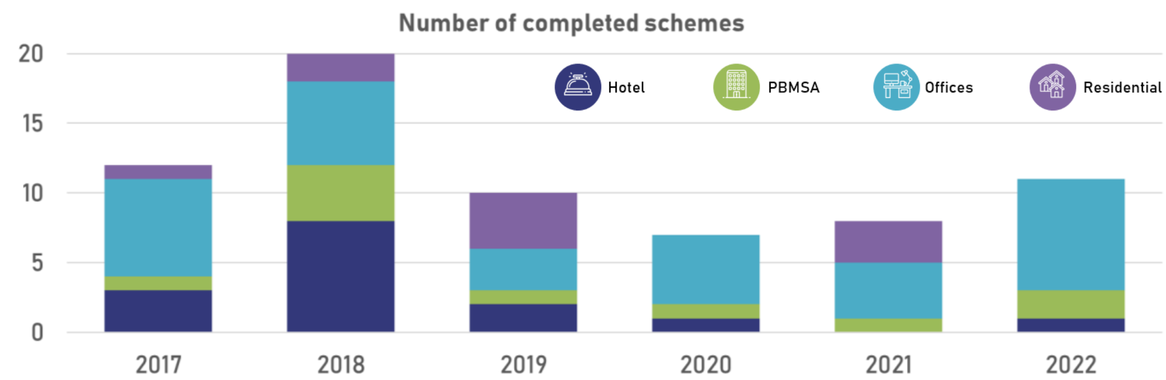
Insights: The majority of city centre jobs are in the Services sectors. Public Administration (Section O) accounts for 15,198 or 18% of city centre jobs ; followed by Administrative and Support Services (Section N) – 13,903 jobs (16%); Professional, Scientific And Technical Activities (Section M) – 12,369 jobs (14%); and Information and Communication (Section J) – 11,193 jobs (13%)

9. Value of development

Definition: The number and estimated value of completed developments within the city centre during the calendar year.

Baseline Position: In 2022, there was an estimated total £190.2 million of development across 3 asset classes in the city centre.

Performance Data:



Data source(s):	Belfast Cityc Council's Regeneration Tracker
Geographical coverage:	City Centre (BMAP)[3]
Frequency of data collection:	Monthly
Further information:	The City Regenertion and Development unit collate information related to completed schemes broken down by asset class including hotel, office space, residential and PBMSA. Additional information is captured about each development including its location, size and value.
S75 Breakdowns:	N/A

Insights: Office accommodation represented the majority of developments during 2022, with 8 schemes completing totalling £152.7 million. There were 2 completed PBMSA schemes totalling £33million and 1 hotel scheme totalling £4.5 million. There were no residential schemes completed during 2022.

The Regeneration Tracker also reports tha there were 175 hotel rooms; 1,204 PBMSA bed spaces; 404,500 sq ft of office accommodartion; and 580 residential units under construction.

10. Vacancy rate

Definition: . The number of vacant properties as a proprtion of all properties.

Baseline Position: The 2023 Retail Study reported that the vacancy rate within the Primary Retail Core was 21%.

Performance Data:

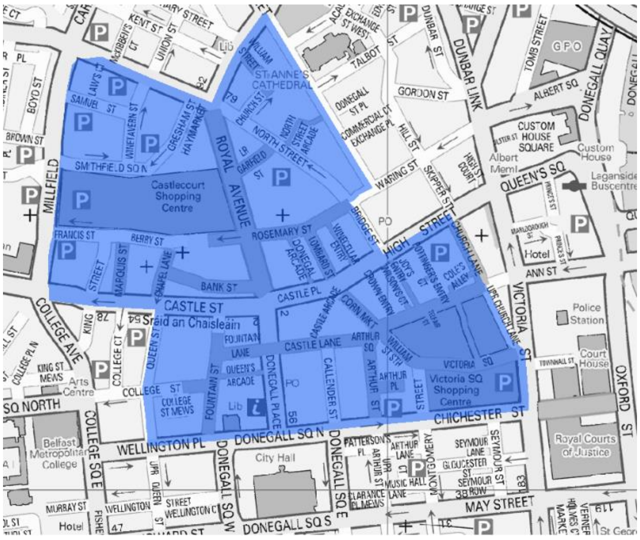
Further analysis of previous years' studies is currently underway and will be reported in due course.

Data source(s):	Belfast City Council's Retail Study
Geographical coverage:	Primary Retail Core[2]
Frequency of data collection:	Annual
Further information:	Belfast's Primary Retail Core can be further broken down into the following zones to report vacancy rate by zone: Victoria Square, City Centre, Cathedral Quarter, Castle Court and Donegall Place / Royal Avenue. A persistent vacancy rate can also be reported and is defined as those properties that have been vacant for 2 or more years – this remains a data development area.
S75 Breakdowns:	N/A

Insights: Analysis by Pragma Consulting who were commissioned to undertake a retail analysis of the city centre reported that Belfast's vacancy rate increased from 23% in 2018 to 25% in 2021.

This was a similar 2 percentage point increase experience by the UK average vacancy rate.

However UK vacancy levels are almost half that of Belfast (12% in 2018 increasing to 14% in 2021).



[2] The blue shaded polygon is the Primary Retail Core area.

11. Independent retailers

Definition: The number of retailers who are independents and the proportion of total retail units.

Baseline Position: Analysis by Pragma Consulting who were commissioned to undertake a retail analysis of the city centre reported that there were 362 independent retailers in 2021; or 57% of total retail units were occupied by indepenedent retailers.

Performance Data:

Analysis of Belfast City Council Retail Study datasets from previous years is currently underway and will be reported in due course.

Data source(s):	Belfast City Council's Retail Study
Geographical coverage:	Primary Retail Core[2]
Frequency of data collection:	Annual
Further information:	A balance of independent retailers and attracting new to market brands will provide Belfast's Primary Retail Core with a diverse retail mix that will encourage visitors to the city. Baseline information from Pragma can be broken down further by retail zone and by merchandising category.
S75 Breakdowns:	N/A

Insights: Analysis by Pragma shows that the while the number of independents has reduced from 395 in 2018 to 362 in 2021; the number of independents as a proportion of total retail units increased from 51% to 57% over the same period. This is due to a larger reduction in units among national occupiers. The majority of independents are from the Food & Beverage (23%) and Services (39%) sectors.

12. Consumer spend

Definition: . The total consumer expenditure within the City Centre's Primary Retail Core broken down by spend category including food and beverage; clothing and footwear; household; leisure goods; personal; and grocery.

Baseline Position: Analysis by Pragma Consulting who were commissioned to undertake a retail analysis of the city centre reported that while total consumer expenditure decreased between 2018 and 2021, Food & Beverage sales increased from £63m in 2018 to £67m in 2021. Sales densities grew at an annual rate of 8.6% over the same period.

Performance Data:

This remains a Data Development area.

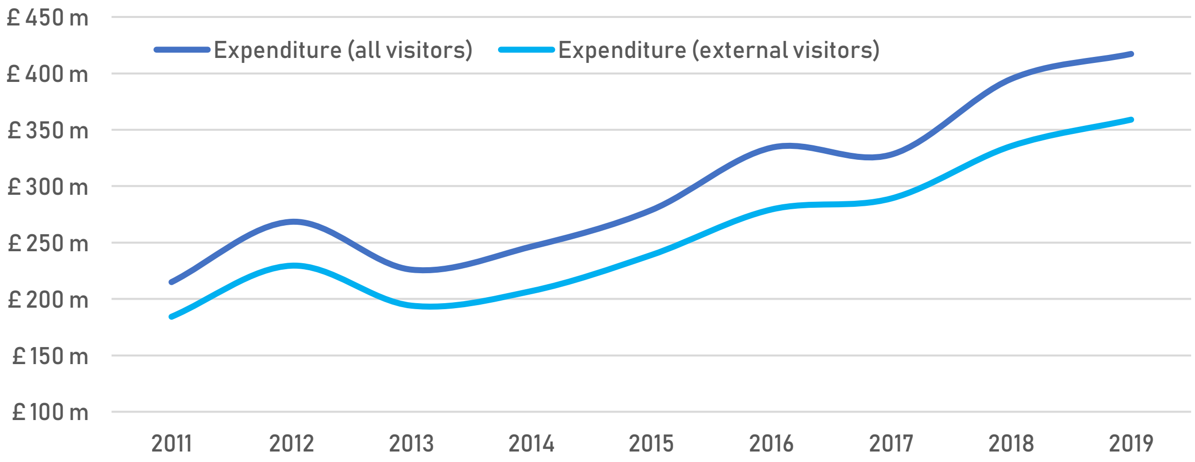
Data source(s):	TBC
Geographical coverage:	Primary Retail Core[2]
Frequency of data collection:	-
Further information:	The Belfast City Centre Regeneration and Investment Strategy includes a policy to 'Manage the Retail Offer' with the aim of addressing the retail decline of the centre through a targeted and proactive approach to regeneration of retail areas and management of the city centre retail offer.
S75 Breakdowns:	-

13. Value of tourism

Definition: .Estimated spend on overnight trips to Belfast by i) all visitors; ii) external/out-of-state visitors.

Baseline Position: In 2019, tourism spend in Belfast (£417m) represented 40% of all spend in NI; this proportion increases to 49% for tourism spend from external visitors..

Performance Data:



Data source(s):	NISRA Tourism Statistics Branch - Local government district tourism statistics microdata, which is drawn from the following 4 individual sources: NISRA's NI Passenger Survey, Household Travel Survey (CSO), Survey of Overseas Travellers (Fáilte Ireland) and NISRA's Continuous Household Survey.
Geographical coverage:	Belfast City Council area (Citywide)
Frequency of data collection:	Annual
Further information:	Tourism statistics have not been published since the underpinning surveys were paused during the Covid lockdown. The latest data release refers to 2019 figures. The Belfast City Centre Regeneration and Investment Strategy includes a policy to 'Maximise the Tourism Opportunity' to take tourism in Belfast up a level by complementing the existing offer with another big attraction or festival and fostering the general buzz and activity of the centre.
S75 Breakdowns:	No

Insights: The total number of overnight trips to Belfast has grown by 91% between 2011 and 2019. However over the same period the total number of nights stayed in Belfast has grown by 42%. The number of nights per visit has therefore fallen from 3.8 in 2011 to 2.8 in 2019.

Research suggests that external visitor (from outside Northern Ireland) spend more. Estimated spend on overnight trips from external visitors has grown by 95% between 2011 and 2019.

While 24% of all overnight trips are from domestic (NI) travellers, 42% come from Great Britain, 12% from mainland Europe, 9% are from North America and 13% are from the rest of the world (including the Republic of Ireland).

The most popular reason for taking an overnight trip to Belfast is Holiday/Pleasure/Leisure (48%), followed by Visiting Friends/Relatives (35%). Travel for Business purposes accounts for 15% of all trips.

14. City centre living population

Definition: . The total number of people living within the city centre boundary.

Baseline Position: The Council's City Centre Living Vision report estimates the city centre population to be 12,398.

Performance Data:

This remains a Data Development area. A number of small area geographies are being approximated to the BMAP City Centre boundary based on the location of their centroid. This will enable a calculation to utilise NISRA's Mid Year Population Estimates for Small Areas to obtain trend data from 2001 to 2020.

Data source(s):	NISRA Mid Year Population Estimates for Small Areas
Geographical coverage:	A selection of small areas approximate to City Centre (BMAP)[3]
Frequency of data collection:	Annual
Further information:	The small areas have been identified where there centroid falls within the BMAP City Centre boundary. The Belfast City Centre Regeneration and Investment Strategy includes a policy to 'Increase the Residential Population' with the aim of adding liveliness and bustle to the city centre at all hours and creating a market for retail, restaurants and entertainment by supporting residential development of various types and tenures at key locations.
S75 Breakdowns:	No

Insights: Research by Savills indicates that the city centre population has experienced growth of 29% since 2011. .There are 6,149 households within the centre which is dominated by the private renter households (41%); followed by the social renter households (37%) and finally owner occupied households (22%).

CITY GROWTH AND REGENERATION COMMITTEE

Belfast City Council

Subject:	Approval for a Market at Titanic Belfast
Date:	8 November, 2023
Reporting Officer:	John Greer, Director of Economic Development
Contact Officer:	Lisa Toland/ Clodagh Cassin

Restricted Reports

Is this report restricted? **Yes** [ ] **No** [X]

Please indicate the description, as listed in Schedule 6, of the exempt information by virtue of which the council has deemed this report restricted.

Insert number [ ]

1. Information relating to any individual
2. Information likely to reveal the identity of an individual
3. Information relating to the financial or business affairs of any particular person (including the council holding that information)
4. Information in connection with any labour relations matter
5. Information in relation to which a claim to legal professional privilege could be maintained
6. Information showing that the council proposes to (a) to give a notice imposing restrictions on a person; or (b) to make an order or direction
7. Information on any action in relation to the prevention, investigation or prosecution of crime

If Yes, when will the report become unrestricted?

After Committee Decision [ ]
After Council Decision [ ]
Sometime in the future [ ]
Never [ ]

Call-in

Is the decision eligible for Call-in? **Yes** [X] **No** [ ]

1.0	**Purpose of Report/Summary of Main Issues**
1.1	The purpose of this report is to update members on:

	– Seek approval for an external market.
2.0	**Recommendation**
2.1	Members are asked to: – approve an external market to take place in the TEC Titanic Belfast.
3.0	**Main Report**
3.1 3.2 3.3 3.4 3.5	Belfast City Council has exclusive rights to hold markets in Belfast. Anyone wishing to operate a market or car boot sale within Belfast must apply to council for permission. The Markets Unit have received an application from Titanic Belfast for Tedberry Market at TEC. The date of the market is Saturday 25 November 2023 and it will run from10am-5pm. This is a one-off Christmas themed event/ exhibition. The event supports local entrepreneurs and small businesses in Northern Ireland, all showcased under one roof for one day only. Approx 180-200 Christmas themed stalls for shopping, crafts and food will take part in this market. Visitors will be able to purchase goods on the day and also pre order goods with crafts people showcased. This a paid entry event - Ticket prices: Adult £8, Child £3 (0-16). **Background** - The event was previously held in Ivory Pavilion and then in Eikon Centre in Lisburn last year, where they did not need a market license for the event. The event organisers were unaware that this could be needed in Belfast, hence the late application. The event is being organised by Ted & Stitch and Millson & Berry, two small local businesses. This event has a dedicated niche following, who come each year, so will not displace trade from St. George's market. As the event is a one-off, paid entry event, this also distinguishes it from the offering at St. George's. Event website - https://tedberry.co.uk/ **Financial and Resource Implications** This market will bring a potential income to the council of £1050. **Equality or Good Relations Implications/Rural Needs Assessment** No specific equality/good relations implications. No negative impact on rural areas.
4.0	**Appendices - Documents Attached**
	None