

**Democratic Services Section
Legal and Civic Services Department
Belfast City Council
City Hall
Belfast
BT1 5GS**



**Belfast
City Council**

7th February, 2020

MEETING OF CITY GROWTH AND REGENERATION COMMITTEE

Dear Alderman/Councillor,

The above-named Committee will meet in the Lavery Room - City Hall on Wednesday, 12th February, 2020 at 5.15 p.m., for the transaction of the business noted below.

You are requested to attend.

Yours faithfully,

SUZANNE WYLIE

Chief Executive

AGENDA:

1. Routine Matters
 - (a) Apologies
 - (b) Minutes
 - (c) Declarations of Interest
2. Matters Referred from Council Meeting
 - (a) Motion - Sustainable Transport (Pages 1 - 2)
 - (b) Motion - High Speed Rail Connection (Pages 3 - 4)
3. Restricted Items
 - (a) Draft Belfast Off-Street Parking Order (Pages 5 - 30)
4. Regenerating Places and Improving Infrastructure
 - (a) Pragma Retail Analysis and Emerging Future City Centre Programme (Pages 31 - 50)
 - (b) Future City Centre Programme: City Centre Connectivity Study - Draft Vision (Pages 51 - 76)

5. Growing Businesses and the Economy
 - (a) Future City Centre Programme - Sundays in the City (report to follow)
6. Strategic/Operational Issues
 - (a) City Growth and Regeneration Committee Priorities 2020-21 (report to follow)
7. Issues Raised in Advance by Members
 - (a) Air Passenger Duty (Councillor Graham to raise)



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| Subject: | Motion – Sustainable Transport |
| Date: | 12th February, 2020 |
| Reporting Officer: | Mr. H. Downey, Democratic Services Officer |
| Contact Officer: | Mr. H. Downey, Democratic Services Officer |

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| Restricted Reports | |
| Is this report restricted? | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| If Yes, when will the report become unrestricted? | |
| After Committee Decision | <input type="checkbox"/> |
| After Council Decision | <input type="checkbox"/> |
| Sometime in the future | <input type="checkbox"/> |
| Never | <input type="checkbox"/> |

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| Call-in | |
| Is the decision eligible for Call-in? | Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> |

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| 1.0 | Purpose of Report/Summary of Main Issues |
| 1.1 | To consider a motion on Sustainable Transport, which was referred to the Committee by the Council at its meeting on 3rd February. |
| 2.0 | Recommendation |
| 2.1 | The Committee is requested to consider the motion and take such action thereon as may be determined. |
| 3.0 | Main Report |
| 3.1 | <p>At the Council meeting on 3rd February, the following motion was proposed by Councillor Groogan and seconded by Councillor O'Hara:</p> <p><i>“This Council supports the promotion and expansion of sustainable transport in Belfast as a critical step in addressing the dangerous levels of air pollution and congestion across the City and in the context of our climate emergency.”</i></p> |

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| | <p><i>With the appointment of a new Minister for Infrastructure, the Council should ensure that the Minister is clear about our commitment to sustainable transport options and the need for urgent action on climate.</i></p> <p><i>Therefore, the Council agrees to write to the Minister to state that the Experimental Traffic Control Scheme Permitted (Taxis in Bus Lanes), which was proposed by her Department, does not have the Council's support and to urge her to not progress this further, instead focusing efforts on further measures to enhance the provision of public transport, cycle infrastructure and pedestrian priority in the City."</i></p> |
| 3.2 | <p>In accordance with Standing Order 13(f), the motion was referred without debate to the City Growth and Regeneration Committee.</p> |
| 3.3 | <p><u>Financial and Resource Implications</u></p> <p>None associated with this report.</p> |
| 3.4 | <p><u>Equality or Good Relations Implications/Rural Needs Assessment</u></p> <p>None</p> |
| 4.0 | <p>Documents Attached</p> |
| | <p>None</p> |



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|---------------------------|--|
| Subject: | Motion – High Speed Rail Connection |
| Date: | 12th February, 2020 |
| Reporting Officer: | Mr. H. Downey, Democratic Services Officer |
| Contact Officer: | Mr. H. Downey, Democratic Services Officer |

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| Restricted Reports | |
| Is this report restricted? | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| If Yes, when will the report become unrestricted? | |
| After Committee Decision | <input type="checkbox"/> |
| After Council Decision | <input type="checkbox"/> |
| Sometime in the future | <input type="checkbox"/> |
| Never | <input type="checkbox"/> |

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| Call-in | |
| Is the decision eligible for Call-in? | Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> |

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| 1.0 | Purpose of Report/Summary of Main Issues |
| 1.1 | To consider a motion on High Speed Rail Connection, which was referred to the Committee by the Council at its meeting on 3rd February. |
| 2.0 | Recommendation |
| 2.1 | The Committee is requested to consider the motion and take such action thereon as may be determined. |
| 3.0 | Main Report |
| 3.1 | At the Council meeting on 3rd February, the following motion was proposed by Councillor S. Baker and seconded by Councillor Garrett: <i>“This Council welcomes the commitment in the ‘New Decade New Approach’ document which states that “The Irish Government is supportive of serious and detailed joint consideration</i> |

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| | <p><i>through the NSMC of the feasibility of a high-speed rail connection between Belfast, Dublin and Cork, creating a spine of connectivity on the island.”</i></p> <p><i>As this is also a Council priority, the Council will seek a meeting with Irish Government officials, Council officers and party group leaders to discuss this proposition further.”</i></p> |
| 3.2 | <p>In accordance with Standing Order 13(f), the motion was referred without debate to the City Growth and Regeneration Committee.</p> |
| 3.3 | <p><u>Financial and Resource Implications</u></p> <p>None associated with this report.</p> |
| 3.4 | <p><u>Equality or Good Relations Implications/Rural Needs Assessment</u></p> <p>None</p> |
| 4.0 | Documents Attached |
| | None |

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| Subject: | Pragma Retail Analysis and Emerging Future City Centre Programme |
| Date: | 12th February, 2020 |
| Reporting Officer: | Sean Dolan, Acting Director of City Regeneration and Development John Greer, Director of Economic Development |
| Contact Officer: | Catherine McKeown, Regeneration Project Officer Deirdre Kelly, Programme Manager |

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| Restricted Reports | |
| Is this report restricted? | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| If Yes, when will the report become unrestricted? | |
| After Committee Decision | <input type="checkbox"/> |
| After Council Decision | <input type="checkbox"/> |
| Some time in the future | <input type="checkbox"/> |
| Never | <input type="checkbox"/> |

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| Call-in | |
| Is the decision eligible for Call-in? | Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> |

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| 1.0 | Purpose of Report or Summary of main Issues |
| 1.1 | <p>The purpose of the report is to present to Members:</p> <ul style="list-style-type: none"> - the key findings and recommendations in the Executive Summary of the Retail Analysis as developed by Pragma Consulting Limited (see appendix 1); and - the work undertaken by the Place and Economy Department in developing the Future City Centre Programme and its programme strands. |

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| 2.0 | Recommendations |
| 2.1 | <p>The Committee is requested to:</p> <ul style="list-style-type: none"> i. note the key findings and recommendations in the Executive Summary of the Retail Analysis, as developed by Pragma Consulting Limited; ii. note the progress in relation to shaping the Future City Centre Programme and its programme strands aligned to the Retail Analysis; iii. agree that officers develop the programme strands through engagement with city stakeholders and provide the Committee with an annual update on collective benefits and outcomes of the programme; and iv. approve the attendance of the Chair and Deputy Chair (or their nominees) at the Belfast Chamber Belfast Forward Conference on 27th February, 2020. |
| 3.0 | Main report |
| 3.1 | <p><u>Background</u></p> <p>Belfast City Centre is currently experiencing significant levels of development and investment across a range of sectors, with a number of major regeneration and development projects set to come forward in the years ahead. Belfast City Centre Regeneration and Investment Strategy (BCCRIS) recognises that the city's large-scale development projects are catalysts for wider city regeneration. This is further supported by the Belfast Agenda and the Local Development Plan. Fundamental to the delivery and development of the city's ambitions, and ensuring that no one is left behind, is the Council's Inclusive Growth Strategy.</p> |
| 3.2 | <p>The retail sector is crucial to Belfast's physical and economic development. BCCRIS provides a vision for retail in Belfast City Centre as <i>"providing a regionally competitive retail offer and a shopping experience that is unmatched anywhere else in Northern Ireland"</i>.</p> |
| 3.3 | <p>Pragma Consulting Ltd was commissioned in April 2018 to undertake a Retail Analysis of Belfast City Centre to identify the challenges facing the city's retail sector and inform recommendations on how best to address these. The scope of the Retail Analysis was developed in conjunction with the Belfast Chamber of Trade and Commerce (BCTC).</p> |
| 3.4 | <p>At the City Growth and Regeneration Committee meeting in September, Pragma Consulting Ltd presented the key findings and market intelligence on the retail sector and identified a number of recommendations and opportunities within the city's retail offer. The attached Executive Summary (appendix 1) of the Retail Analysis Report documents the key findings and recommendations.</p> |

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| | <u>Key Findings</u> |
| 3.5 | Key findings as documented in Appendix 1 and as presented to the Committee in September 2019: |
| 3.6 | 1. Catchment and shopping patterns: Belfast is the major shopping destination in Northern Ireland. Benchmarking its performance against comparable cities highlights the opportunity to draw more shoppers into the city centre from the existing catchment area. Belfast currently has a market share of £2.4bn and ranks 21 st alongside Aberdeen and it is the relevance of Belfast's retail and leisure offer, and the lack of point of densities that is causing low sales densities, along with a vacancy figure of 17% within the Primary Retail Core. That said brands unique to Belfast and not replicated anywhere else in NI perform well. Independent retailing forms an integral part of Belfast's retail offer accounting for 51% of the city's retailing units, some 20% above comparable locations. |
| 3.7 | 2. Trading Gap Analysis is a realistic estimate of potential turnover growth worth £114m a potential increase 23% on current non-grocery sales. This gap in the market highlights an opportunity to increase sales from existing customers by improving the relevance and breadth of the current offer. |
| 3.8 | 3. Impact of the City Centre: Belfast's retail sector has the potential to be a driving factor for improving the city centre's performance and supporting further development. The positive impacts on the city centre include Belfast's strong independent retailing sector, tourism potential, new office developments, and the increasing demand for city centre living. The challenges of the retail sector are not unique to Belfast and are felt in the UK and Ireland. The ripple effect of the demise of popular high street brands have impacted on the retail landscape itself and performance of our high streets. Current trends affecting the retail industry and the shift away from physical bricks and mortar retail towards online shopping feed the customers desire for convenience and 'experience' on their shopping trips. |
| | Recommendations |
| 3.9 | 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 shoppers. These include; reviewing opening hours and legislation, enhancing the leisure provision, animating spaces and maximising the tourism opportunity through the development of a new central tourist destination, proposed as part of Belfast |

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| | <p>Region City Deal. Creating a point of difference and a unique offering will be paramount in driving visits/footfall; supporting city centre living, improving accessibility, connectivity and infrastructure along with increased office/work space development. Together these will have positive impact on city centre vibrancy and inclusive growth.</p> <p>Future City Centre Programme</p> |
| 3.10 | <p>To maximise the benefits and opportunities the retail and leisure sector can bring, the Council and its city partners must work together to embrace current and future trends to address the shortcomings in the existing retail offer. Taking into account Member's comments at Committee in September 2019 officers have developed a programme of work aligned to the retail analysis recommendations. The Future City Centre Programme aims to create a dynamic and experiential destination for shoppers and bolster Belfast as NI's dominant retail and leisure destination. Officers will continue to engage city partners including the BCTC, city reference groups, agents and retailers specialising in retail and leisure, local communities and traders and the Institute of Place Management.</p> |
| 3.11 | <p>The emerging key areas of work fall into five priority areas of focus as outlined below and will require cross-cutting collaboration across Council and wider city centre stakeholders.</p> |
| 3.12 | <p>Physical Regeneration and Environmental Improvements: Pragma recommend a clean, accessible and pleasant environment is a key aspect of the city centre experience. In collaboration with the BIDs, the Council have established a cleaner, greener, safer city stakeholder group to maintain focus cultivating a pleasant and clean city centre.</p> |
| 3.13 | <p>Pragma recognise that office and workspace development can help support the city's overall economy and help the retail sector flourish. Encouraging new developments to deliver quality environments through green and blue infrastructure improvements will help to improve the city centre. This is addressed through the public realm catalyst projects, upgrading the entries and lanes, and the City Centre Connectivity Study (CCCS) which will be presented to Members on a later agenda.</p> |
| 3.14 | <p>It also suggests that providing inclusive City Centre Living could provide a way to manage the amount of retail provision. A city centre residential population will benefit independent traders, providing 'round the clock' demand for goods and services. 'Living over the Shops' should be viewed as a key factor to bring vibrancy to the heart of the city while addressing vacancy and benefitting and protecting our built heritage.</p> |

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| 3.15 | <p>City Centre Vitality: According to Pragma, the trend of ‘Renewable Placemaking and Creating Instagram-able Places’ is a key industry trend that aims to create spaces that encourage customers to visit more regularly to ‘see what’s new’. In response to the fire at Bank Buildings, the Council has been delivering on this through coordinated entertainment, events and pop-up retail. Pragma recommend the better use of public space for animation events, pop up activities such as markets can entice people to the city centre. A calendar of events and entertainment to support this could provide an active marketing tool to drive footfall and encourage longer visits/stays in the city centre.</p> |
| 3.16 | <p>To tackle the trading gap, Pragma highlight the opportunity to increase sales from new and existing customers through improving the relevance of the city’s offer. Pragma suggest reviewing opening hours and legislation will improve performance and create an opportunity to attract new brands, entice start-ups and add to the desire to create a livable, mixed-use city centre. Members agreed in September 2019 that there was a need to consider the city centre Sunday offer in a wider context than “Holiday Resort” designation through an agreed Terms of Reference. The outcomes of this consultation and recommendations will be presented to Committee in a later agenda item.</p> |
| 3.17 | <p>Positioning the City to Complete: Pragma recognises that Belfast’s retail pull is driven by the ‘destination’ status the city holds. However, other comparable cities with dominant catchment achieve a greater shopper spend potential. This along with the challenge of online shopping suggests an opportunity to develop a proposition that provides “something different” to stand the best opportunity of future-proofing the city’s retail activity.</p> |
| 3.18 | <p>The proposed proposition is twofold:</p> <ol style="list-style-type: none"> 1. Targeting new/first to market brands unique to Belfast/Northern Ireland which will increase the retail pull and bolster Belfast as a retail destination; and 2. Supporting independents and start-up’s. The importance of SME’s and independent retailers as a growing focus for city centre retailing provides diversity and a point of difference versus online and out of town competition. |
| 3.19 | <p>Vacancy: Officers have identified the need to understand the vacancy rate in the Primary Retail Core in terms of marketing and positioning the city. A work plan has been identified to examine the number units that are commercially marketed (i.e. to let/for sale), those which are part of development sites and those which are vacant/derelict with current unknown ownership. Officers are currently engaging with commercial property agents to understand</p> |

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| | <p>their retail portfolio, level of interest from international brands in locating to Belfast, feedback on challenges facing retailers/leisure operators from locating in the city centre and barriers to new entrants. An opportunity exists to utilise available vacant units for a plethora of alternative uses such as meanwhile uses potentially suited to community infrastructure, startups and the culture and arts sector as a means of testing products and concepts.</p> |
| 3.20 | <p>Policy and legislation: Pragma recommends the need to create an overarching vision for the city centre as the economic driver of the region. They reinforce that communication between all departments, agencies and organisations could be more efficient and joined up. The Council has worked to establish a city governance structure to support the regeneration, development and the inclusive economic growth of the city. This involves the establishment of the Growing the Economy and City Development Community Planning Board and a cross public / private sector City Centre Reference Group.</p> |
| | <p>Next Steps</p> |
| 3.21 | <p>Individual project strands will be brought back to the Committee as they develop. The Future City Centre Programme will be reported to the Committee on an annual basis, focusing on its collective benefits and outcomes, and identified future priorities.</p> |
| 3.22 | <p>BCTC is hosting a Belfast Forward Conference on 27th February to help harness the energy in the city to promote regeneration, economic growth and social benefits with strong linkages to the Future City Centre Programme. The Chamber has extended an invitation to attend the conference to the Chair and Deputy Chair of the Committee, along with officers involved in the Future City Centre Programme.</p> |
| | <p><u>Finance and Resource Implications</u></p> <p>There are no current financial implications for the Future City Centre Programme, however emerging work strands will be brought to the Committee as appropriate.</p> <p><u>Equality or Good Relations Implications/Rural Needs Assessment</u></p> <p>All emerging work strands will be individually screened for Equality and Good Relations Implications/Rural Needs Assessment</p> |
| 4.0 | <p>Documents Attached</p> |
| | <p>Executive Summary of the Retail Analysis (Pragma)</p> |

Belfast City Centre

Asset Intelligence Analysis: Executive Summary



Belfast
City Council

January 2020

Introduction

Belfast City Council (BCC) are actively working to facilitate economic growth in Belfast. In recent years, the city has seen significant levels of investment and development, with major schemes still to come, including Tribeca Belfast (former Royal Exchange), the new Transport Hub and the redevelopment of the Belfast Waterside (formerly Sirocco). The activity is being undertaken in the context of the ambitious goals set out in Belfast's community plan, The Belfast Agenda, the Local Development Plan (LDP) and the Belfast City Centre Regeneration and Investment Strategy (2015).

Pragma have been appointed to provide market intelligence, identifying opportunities and challenges within the city's retail offer. This analysis aims to assess a variety of short and long-term challenges to the retail and leisure sector in the city, helping the Council and its partners across the city shape future interventions and initiatives to respond to this fast-changing environment.

To inform its analysis, Pragma has carried out research to:

- ❑ Establish Belfast's existing catchment and demographics
- ❑ Benchmark Belfast against locations with a similar market size and geographic dynamic
- ❑ Examine current performance and identify key characteristics of zones within the city centre
- ❑ Identify opportunities for future growth, including quantification of the Trading Gap
- ❑ Understand the future trends affecting the retail industry and identify key opportunities for Belfast
- ❑ Provide recommendations as to how Belfast can best future-proof itself against forthcoming challenges in the retail market.

Summary of Findings

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Executive Summary

Policy Landscape

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Belfast City Centre is currently experiencing significant levels of development and investment across a range of sectors, with a number of major schemes set to come forward in the years ahead. Through Belfast City Centre Regeneration and Investment Strategy 2015 (BCCRIS), the Council has been working to encourage and facilitate this growth. This has been supported more recently via the Local Development Plan process, which sets out how the city will develop over the period to 2035.

Crucial to Belfast's physical and economic development is the role of the retail sector. The Council is focused on the delivery of the BCCRIS, which provides a vision for retail in Belfast City Centre as "providing a regionally competitive retail offer and a shopping experience that is unmatched anywhere else in Northern Ireland". However, the retail landscape across the UK and beyond has changed dramatically in recent years and Belfast must be cognisant of the significant trends and challenges impacting the sector.

Research Scope

This report aims to assess a variety of short and long-term challenges to the retail and leisure sectors in the city, thereby helping the Council and its partners across the city respond to this fast-changing environment. The scope of the analysis concentrates on the following areas:

- ❑ Current catchment and shopping patterns
- ❑ Trading gap analysis for retail, leisure and tenant mix strategy
- ❑ Independent traders
- ❑ Department store commentary
- ❑ Future trends including the potential implications of Brexit
- ❑ Identification of practical steps for the Council and its partners to strengthen and support Belfast's retail offer

Executive Summary & Recommendations

- ❑ Belfast is Northern Ireland's first city and is the major shopping destination in Northern Ireland. The city's principal catchment extends to a 1 hour drivetime, reaching locations including Ballycastle, Dungiven, Newry and the border town of Aughnacloy.
- ❑ Accessible via the M1, M2, A2, A12 and A24, the city is well connected by road. There is sufficient parking provision, including 11 multi-storey car parks. An integrated public transport network provided by Translink also serves the city with park and ride facilities along M1 and M2.
 - ❑ Aligning to the Belfast City Council Car Parking Strategy Action Plan, it is important to implement the actions contained within the Action Plan so car-borne access is effectively managed as part of a balanced approach.
- ❑ At 37%, the city's conversion of catchment residents to shoppers is above the benchmark for similar locations (33%). This is driven by the 'destination' status the city holds, as well as limited comparative retail competition from across Northern Ireland. However, other UK cities that are similarly dominant in catchments lacking comparable competition achieve an average penetration of c.47%. This suggests a clear opportunity to draw more shoppers to Belfast City Centre from its existing catchment.
- ❑ Pragma's IMPACT model ranks Belfast's total market size 21st in the UK, which ranks the city alongside Norwich, Cambridge and Aberdeen. IMPACT is Pragma's in-house system for determining retail catchments. IMPACT modelling assumes the likelihood of a shopper using a particular location is determined by both ease of access and attractiveness of the offer. Belfast, unlike its comparator cities, has unique circumstances and the Belfast Agenda and the ambitions for growth aim to address this.
- ❑ Viewed in the context of the ROI, as a retail destination Belfast would sit between Dublin and Cork. Based upon a 30 minute drivetime, the market size is 34% below Dublin.
- ❑ Based on a detailed audit of the retail offer, Belfast is estimated to achieve below average sales densities across all merchandise groups versus similar locations, with the exception of household goods. If the cost base is the same, lower sales densities will lead to retailers generating a lower profit from their Belfast stores than elsewhere.
- ❑ The demographic profile of the Belfast catchment identifies clear demand for mid-price point fashionable and sophisticated brands. Beyond Belfast, provision is largely restricted to larger centres such as Dublin or online. This lack of alternative provision helps drive estimated sales densities in Belfast City Centre. These brands will also position the city centre well to counteract growing trends, with Young spend being increasingly committed online and an increasing share of Family spend captured by supermarkets.
 - ❑ Where the retail offer is replicated in other locations in close proximity, it lessens the need to travel to Belfast City Centre. Brands unique to Belfast and not replicated elsewhere in Northern Ireland perform well.

Executive Summary & Recommendations

Current Catchment and Shopping Patterns

Page 42

- ❑ Taking into account the size of the market, Belfast City Centre's quantum of retail floorspace is in line with benchmark locations, suggesting it is the relevance of the city's offer, and a lack of a point of difference versus the surrounding offer, that is causing low sales densities, rather than a lack or oversupply of floorspace.
- ❑ If additional space is developed within the city, the content will need to be differentiated enough to attract additional spend. Failing to do so risks reducing existing sales densities further and could be detrimental to the cityscape.
- ❑ Given the additional cost of servicing stores in NI from GB, the uncertainty around the impact of Brexit on Northern Ireland and political uncertainty, Belfast may not rank above comparable UK locations for expanding retailers in the short term.
- ❑ Vacancy with Belfast's Primary Retail Core at 17% is higher compared to a number of dominant shopping locations in the UK, including Aberdeen, Leicester and Reading. A high number of vacant units impacts the overall environment of a city, could negatively influence customer perceptions and could also discourage investment.

Trading Gap Analysis

- ❑ Belfast's estimated Trading Gap is worth £114m, a potential 23% increase on current Non-Grocery sales.
- ❑ The Market Share Gap, worth £59m, highlights an opportunity to increase sales from existing customers, which could be achieved by improving the relevance and breadth of the current offer. If realised, Non-Grocery sales densities will increase to £490/ft².
- ❑ If the conversion of residents to shoppers from across the catchment can be increased to match that achieved by benchmark locations, the city could capture an additional £55m in turnover.

Department Stores

- ❑ There is a clear disparity between the strong performance of House of Fraser in Belfast versus the performance of the brand across the UK, in large part due to the appetite for high-end brands amongst Belfast residents and the limited competing provision of aspirational brands.
- ❑ This is in part evidenced by the February 2019 announcement by House of Fraser of a new long term lease on the Belfast store and with a suggested £10m refurbishment.
- ❑ Given the potential required investment in existing department stores i.e. physical fixtures, staff, rents and rates; it is unlikely department stores will require additional space in Belfast City Centre.

Executive Summary & Recommendations

Independent Traders

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- ❑ Independent retailing forms an integral part of Belfast's retail offer, accounting for just over half (51%) of city centre retail units. Provision is significantly higher (+20%) than in comparable locations across the UK and positively, estimated sales densities are equally strong.
 - ❑ Food and beverage comprises the majority of the independent offer, with identifiable clusters in the Cathedral Quarter, particularly around St Anne's Square and elsewhere in the city centre, around Ann Street and Queen's Arcade. Significantly, these areas have a diverse offering, small unit sizes making them more conducive to a strong independent offer.
- ❑ Independent retail will continue to play a vital role in Belfast City Centre's retail offer going forward. In order to support this sector, the Council and its city partners should consider:
 - ❑ Rates mitigation for small businesses in selected areas of the city centre where it would be beneficial to drive activity. Incentivising daytime operators to open in areas such as the Cathedral Quarter, would assist in counteracting low daytime footfall and improve the productivity and environment of this unique area of the city centre.
 - ❑ Pop-up spaces, which particularly appeal to the independent sector and start-ups as a means of testing products and concepts. Encouraging this type of use, via utilisation of vacant units, would ensure consistent supply of space to trial products and concepts and keep the costs of these trials to a minimum.
- ❑ Clustering of independent retailers can help drive stronger performance. When clustered, these retailers can become a destination due to their authenticity and cater to a specialist shopping trip; the Ecclesall Road in Sheffield and Gloucester Road in Bristol are examples of this.

Recommendations

To maximise the benefits and opportunities that the retail sector can bring, the Council must endeavour to support actions that simultaneously embrace current and future trends and address shortcomings in the existing offer. As the dominant retail destination in Northern Ireland, Belfast is in a strong position to embrace these trends and rise to the challenge of creating a dynamic and experiential destination for shoppers. Key opportunities Pragma have identified for Belfast below.

Enhancing Leisure Provision

- ❑ Whilst there are some current examples, Belfast City Centre has a clear under-provision of new leisure concepts (e.g. Escape Rooms, Mini Golf, Climbing Walls). Creating this provision in the heart of the city centre will create a point of difference versus neighbouring locations and provide unique reasons to visit. Placing provision at the heart of the city centre will improve the night-time economy and, as a result, would be expected to improve the performance of both retailers and food and beverage operators in the city centre.
- ❑ Belfast has a developing leisure offer in the form of arts venues and museums in the Cathedral and Titanic Quarters. Encouraging connectivity between these areas and the retail core will assist in helping shoppers view Belfast as a 'day out' destination.
- ❑ Encouraging travel around the city will be important for maximising the benefits of Belfast's leisure proposition, given the number of key attractions that sit outside of the city centre. Copenhagen and Stockholm have both invested in establishing a range of multi-modal transport sightseeing tours, which optimise different transport networks and facilitate linkage between attractions, cultural districts and shopping quarters.
- ❑ The desire to sustain and grow the city's offer, a coherent proposition will be required in creating the consumer experience. Interspersing retail and leisure throughout the city, encouraging flexible formats which can accommodate the latest in leisure trends under one roof (e.g. indoor golf) and spaces which cater to "Competitive Socialising" (e.g. Lane 7) can help drive sales densities.
 - ❑ The strength of a well performing location, helps to attract new brands and leisure operators.

Recommendations

Renewable Placemaking and Creating 'Instagram-able' Places

- ❑ Renewable placemaking is a key industry trend that aims to create spaces that encourage customers to visit more regularly to 'see what's new'. There are a number of ways to achieve this, including co-ordinated entertainment and events, as well as pop-up retail.
- ❑ The latter provides a clear opportunity to support independent retail. Around three quarters of pop-up stores leased in the UK are by independent retailers or start-ups companies (Retail Gazette 2017).
- ❑ Green spaces and urban parks are increasingly forming part of city centre developments. Emerging concepts such as vertical planting, rooftop gardens, urban farms and water purification are good examples, integrating green spaces into primarily commercial developments.
- ❑ The fire at the Bank Buildings in August 2018 led to the temporary closure of Royal Avenue to traffic. Making this more pedestrian friendly and better connected could encourage the creation of a relaxed, public spaces in the heart of the city.
- ❑ Embracing renewable placemaking and environmental improvements are key to reducing the impact of the vacant units.

Transport

- ❑ Improving transport infrastructure and connectivity between tourist attractions and the city centre will be important to drive additional visits and spend from tourists. The integration of a cruise terminal within the harbour, as detailed with the Tourism Strategy for Belfast, which can operate all year round and enable larger vessel to dock, would bolster the future spend obtainable from cruise ships. Bringing the terminal closer to the city centre would be sustainably and economically beneficial.

Planning

- ❑ As the local authority, rather than a major retail landlord or asset manager, Pragma recognises the Council's limitations in affecting change at a micro-level. Where possible, the Council could aim to shape the city's offering via a combination of exerting its planning powers whilst identifying, supporting and potentially funding proposals that will improve and future-proof the city's offering such as more mixed use developments with broader appeal.
- ❑ Retail Assessments should be requested for largescale city developments and should be carefully considered in terms of the sequential test outlined in the SPPS.

Recommendations

City Centre Living

- ❑ While city centre living is not currently well established in Belfast, it is a vital element in driving future retail performance; increasing the total market size, providing round-the-clock demand for goods and services and creating an appealing target audience for brands.
- ❑ In addition, residential development provides a way to manage the overall amount of retail provision in the city centre – condensing provision will increase sales densities, improve profitability and create a competitive tension for space, improving rental values.
 - ❑ Identifying key sites, working with developers via the planning process and making the best use of Council-owned development sites will all help bring forward greater residential development in the city.
 - ❑ Policy should help facilitate city centre living, such as The Belfast Agenda and LDP's ambitious target to build 8,000 units by 2035.
 - ❑ Encouraging the creation of sustainable communities that reflect wider demography rather than mono-tenure and developing a variety of unit types and sizes as well as the infrastructure necessary to support them.
 - ❑ 'Living Above the Shops' should be viewed as a key way to bring vibrancy to the heart of the city centre. This would necessitate improvements to the public realm that would create a more appealing city centre environment to all users.

Office Development and Working Space

- ❑ Similarly, large scale office development has rejuvenated urban locations including Kings Cross, White City and Salford Quays. New commercial development can help support Belfast City Centre's overall economy and help the retail sector flourish. To make the most of proposed developments, such as those at City Quays, Tribeca Belfast (formerly Royal Exchange) and Belfast Waterside (formerly Sirocco Works), there must be a focus on good pedestrian and cycle connections and consideration of the types of retail provision these developments need to have on-site versus what types of uses should be restricted to protect the city centre.
- ❑ Initiatives such as co-working spaces, where start up companies can set up and work, can provide an alternative use of vacant space, but also satisfy the increasing demand for flexible working spaces. These will also have spin-off benefits for neighbouring retailers and food and beverage operators.

Recommendations

| | |
|------------------------------|---|
| Vacancy | <ul style="list-style-type: none"> ❑ Singularly vacancy is difficult to overcome. Events, such as the King Street Festival in Manchester, which was organised by Manchester's BID, can be a means of driving footfall and increasing the prominence of a location. The festival gained publicity, featuring in 83 newspaper and magazine articles and resulted in a footfall increase of 72% for 2017 versus 2016. Going forward, organising coordinated events for targeted areas of the city could be a role for Belfast's BIDs. |
| Leasing | <ul style="list-style-type: none"> ❑ Pragma recommends leasing focus should continue to attract 'new to market' brands to the city, building on the success of occupiers such as Stradivarius, Oliver Bonas and Zara. These anecdotally appear to be performing well. While the geographical boundaries and historic associations are inhibitors to this target, Pragma believes this is the strongest opportunity to ensure Belfast City Centre retains its position as the leading retail offer in Northern Ireland. Attracting such brands will require a combined effort from the key stakeholders within the city; Asset managers will need to continue to 'beat the drum' on the strong performance and the Council will need to support proposed developments that embrace wider city trends to enhance the city's overall offer, helping bring Belfast up the priority list for these retailers. |
| Policy and Governance | <ul style="list-style-type: none"> ❑ Belfast may also wish to consider its governance arrangements for the city centre. Through feedback received during the course of this analysis, there are a number of agencies, departments and organisations with various responsibilities and roles. From the operational to the strategic, and it is not clear that communication and coordination between all of these actors is as efficient and joined up as it might be. This is something the Council and all parties will wish to reflect on, particularly in the context of tightening public sector budgets. ❑ To facilitate more cohesive governance, which could potentially include Belfast's BIDs will help to provide t a clear strategic plan. This will require a clear and coherent vision for the city, which the multiple agencies and departments can use as the foundation of their initiatives. It is recommended that any overarching body include both public and private sector to ensure an approach which reflects both political and commercial desires and realities. ❑ Where the Council faces limitations in its ability to facilitate change, there is a requirement for an Action Plan to be developed. This can identify not only which organisations, bodies and departments are best suited to orchestrate change, but also how the specified initiatives can be feasibly actioned |

Recommendations

Green and open spaces

- ❑ In accordance with the emerging Green and Blue Infrastructure Plan and growing trend of bringing green spaces into urban areas, consideration should be taken ensure that vegetated areas and waterways are strategically planned and delivered to enhance ecosystem services that benefit living, working and visiting Belfast. The emergence of the Developer Contributions Framework will help to ensure developments deliver quality environments through green and blue infrastructural improvements as well as improving the city's public realm.

Tourism

- ❑ The Council should continue to drive forward the second tourist attraction proposed as part of the Belfast City Region Deal, which is to be potentially located in the Belfast city centre and will encourage tourist spend to the city benefitting the retail and food and beverage offer.
- ❑ Opportunities based around cruise ship passengers need to acknowledge the typical lower spend per head committed by cruise ship visitors, due to the majority of food and beverage spend already having been committed onboard.

Summary

- ❑ Pragma has identified target occupiers that would be suitable for Belfast City Centre. With refreshed city governance, joined up working with the Council and its city partners, a retail marketing strategy could to be created that can be used to approach these brands, alongside a rebuttal of the barriers, such logistical challenges, which may discourage retailers from locating in Northern Ireland.
- ❑ Ultimately, the priority must be to embrace future trends and rise to the challenge of creating a dynamic and experiential destination for shoppers. Key to this will be prioritising developments that can establish Belfast as a leisure 'day-out' destination, in order to drive visits into the city. The growth of online is a key challenge, and whilst population growth can help mitigate the effects, long term the city will need to be creative and develop a proposition that provides "something different" to stand the best opportunity of future-proofing the city including strengthening Belfast's appeal with niche and unique retail and leisure opportunities.



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| Subject: | Future City Centre Programme: City Centre Connectivity Study - Draft Vision |
| Date: | 12th February, 2020 |
| Reporting Officer: | Sean Dolan, Acting Director, City Regeneration and Development |
| Contact Officer: | Callie Persic, Regeneration Project Officer |

| | |
|---|---|
| Restricted Reports | |
| Is this report restricted? | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| If Yes, when will the report become unrestricted? | |
| After Committee Decision | <input type="checkbox"/> |
| After Council Decision | <input type="checkbox"/> |
| Sometime in the future | <input type="checkbox"/> |
| Never | <input type="checkbox"/> |

| | |
|---------------------------------------|---|
| Call-in | |
| Is the decision eligible for Call-in? | Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> |

| | |
|------------|--|
| 1.0 | Purpose of Report/Summary of Main Issues |
| 1.1 | To present to the Committee the draft Phase 1 of the City Centre Connectivity Study and seek approval to progress to Phases 2 and 3. |
| 2.0 | Recommendations |
| 2.1 | <p>The Committee is requested to:</p> <ul style="list-style-type: none"> • endorse Phase 1 of the City Centre Connectivity Study; • agree to progress to Phases 2 and 3; and • agree to develop demonstration and pilot projects that helps builds interest and discussion in the city about the future shape and functions of the city centre. |

| | |
|------------|---|
| 3.0 | Main Report |
| | <u>City Centre Connectivity Study</u> |
| 3.1 | The Belfast Agenda outlines the City's ambition to promote the development of sustainable transport and includes promoting walking and cycling. The support, and concept, of sustainable place-making in the city reflects one of the key policies in the Belfast City Centre Regeneration and Investment Strategy (BCCRIS), which seeks to create a green, walkable, cycleable city centre. It specifically references the lack of green space and tree-lined streets, and identifies the need for rebalancing the scales between tarmac and soft landscaping and recognises that there is no provision for children in the city centre. |
| 3.2 | Recent events in Belfast City Centre, including the fire at Bank Buildings in 2018, have prompted calls to examine how the heart of the city could be reimagined to create more sustainable, liveable and people-focussed places that better meet the needs of those who live, work, visit and invest here. The future success of Belfast as a regional driver will require a clear understanding of the changing role of the City Centre, and ensuring the right mix of offices, retail, hotels, tourist attractions, creative industries, universities and colleges, housing and social infrastructure. It is acknowledged that the city centre must adapt to provide the requirements of this changing environment and must also provide for inclusive access and growth, ensuring all communities have the opportunity to benefit from enhanced employment, leisure and social opportunities. |
| 3.3 | At the City Council's City Growth and Regeneration Committee meeting on 5th June and subsequent amendments at Council on 1st July, it was agreed to examine how the city centre should develop to take into account the emerging changing use in a way that is accessible and welcoming for all, and to include an exploration into models of pedestrianisation and other initiatives that facilitates the development of the city centre enabling both pedestrian enjoyment and sustainable transport access. |
| 3.4 | The Council, DfC and DfI agreed to jointly commission the City Centre Connectivity Study that will develop a shared vision for the city centre. After a competitive procurement process, a multi-disciplinary team from Jacobs was appointed. |
| 3.5 | The aim of the Connectivity Study is to agree a shared approach to creating a more attractive, accessible, safe and vibrant city centre which will improve economic, societal, health and environmental wellbeing for all by: |

- creating healthy, vibrant, sustainable and shared spaces;
- providing improved access for people walking and cycling;
- creating places for people to live;
- encouraging regeneration; and
- enhancing civic pride to attract local people and visitors

3.6

The primary study area is the central core of Belfast city centre and key connecting corridors (see Figure 1). The wider area of impact is defined by the Inner Ring Road, and the study will seek to understand and address connectivity issues experienced along key arterial routes and how these affect adjacent communities.

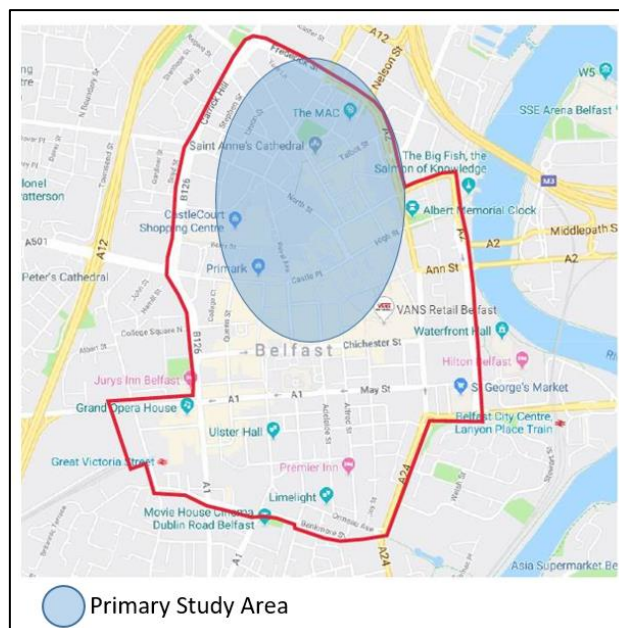


Figure 1 Map of Study Area

Phase 1 Sept – Dec 2019:

3.7

Development of a shared Vision

This Phase is complete. Throughout Phase 1 Jacobs worked closely with officers and departmental officials and stakeholders to develop the draft Vision. Within this initial Phase there were three elements of work that informed the shared Vision for the city centre;

- Stage one - *Understanding Best Practice* considered how Belfast could address current issues, through analysis of established benefits and dis-benefits of approaches that other cities with similar characteristics have implemented to transform their city centre.

| | |
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| | <ul style="list-style-type: none"> • Stage two - <i>Understanding Belfast City Centre</i> looked at how the city centre functions to ensure a balance between the different requirements and needs of users in terms of access, city centre servicing, deliveries, movement and footfall, modes of transport and land use. This Stage also analysed the changing nature of the city centre, including mapping of emerging and built developments that will deliver diversification of the city centre including enhanced tourism, city centre living, working, leisure and open space, and green infrastructure. • Building on this information and best practice, Stage three resulted in an ambitious Vision, <i>A Bolder Vision for Belfast</i>. <p><i>Stakeholder Engagement</i></p> <p>3.8 Statutory bodies, businesses, interest groups, communities and resident's groups will be engaged throughout each Phase of the study. The following engagement took place during the development of the draft Vision in Phase 1:</p> <ul style="list-style-type: none"> • 1-1 engagement with key stakeholders, statutory authorities and delivery partners; • Residents Workshop with communities in and surrounding the city centre • Visioning Workshop with key civic partners and organisations • Political briefing (invites to all Councillors and Belfast MLAs and MPs) • Briefings to BCC Chief Executive and DfI and DfC Permanent Secretaries <p><i>Final draft Vision: A Bolder Vision for Belfast</i></p> <p>3.9 This document sets out the Case for Change, learning from other cities of similar size and Visioning Principles that underpin the Vision. The Vision is ambitious and challenging and provides the framework for 13 'What If?' ideas that were identified through the engagement events and benchmarked against the Visioning Principles. These are high-level and are intended to inspire potential solutions to shape a dynamic 21st century city. In order to achieve this level of transformation, future changes must be radical. This will present challenges, and require intensive partnership working to maintain focus and alignment of resources on the overall mission and vision of the Connectivity Study. Commitment across statutory partners and stakeholder organisations to ensure coherence, momentum and phased delivery is required as is communication and engagement with citizens to support behaviour change and to create people-focused city.</p> |
|--|--|

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| 3.10 | <p>The Visioning Principles, as identified in Appendix 1 '<i>A Bolder Vision for Belfast</i>' are:</p> <ul style="list-style-type: none"> • Creating a healthy, shared, vibrant and sustainable environment that promotes wellbeing for all, inclusive growth and innovation. • Fundamentally changing the centre of Belfast to prioritise integrated walking, cycling and public transport and end the dominance of the car. • Providing lively, safe and green streets linking inclusive shared spaces to promote resilience and enhance our built heritage. • Removing severance and barriers to movement between the centre of Belfast and the surrounding communities to improve access for all. |
| 3.11 | <p>The draft document has been agreed with the Permanent Secretaries for DfI and DfC and the Council's Chief Executive and is currently undergoing Ministerial review and approval within DfI and DfC.</p> |
| 3.12 | <p>In early January 2020 BCC, DfC and DfI commenced the scoping of Phases 2 and 3 and intend to procure both Phases in April, with a projected timeframe as outlined below:</p> <ul style="list-style-type: none"> • Phase 2 Spring/Summer 2020: Develop an action plan to outline scenarios and delivery options based on the Future Vision. The action plan and options will be used to inform further discussion with key civic partners, communities, residents, Third Sector organisations, interest groups, statutory authorities and city leaders. • Phase 3 Autumn/Winter 2020/21: A 12 week, city-wide public consultation on the options to deliver the Future Vision and the emerging actions. |
| 3.13 | <p>Members should be aware that currently there is no capital funding aligned to delivering the outcomes of the Phase 2 and 3 works, however this work will be critical to informing the design criteria of key infrastructure projects including, but not limited to, Streets Ahead Phase 3 & 5, and the BRT Phase 2 projects. The ambition of the three organisations is that this work will help to shape and inform strategies, policies and projects going forward, pending approvals and adoption as outlined in section 3.11 of this paper.</p> |
| 3.14 | <p><u>Equality, Good Relations and Rural Needs Implications</u></p> <p>There are no Equality, Good Relations or Rural Needs implications at this stage. The Council's Equality and Diversity Officer will be consulted during any future consultation</p> |

| | |
|------------|--|
| | <p>process and any proposed approach will be subject to the Council's screening requirements to ensure that Equality and Good Relations implications and Rural Needs are fully considered.</p> <p><u>Finance and Resource Implications</u></p> |
| 3.15 | <p>The budget requirements for Phases 2 and 3 are currently under assessment along with the scope and specification. Whilst there will clearly be both financial and human resources attached to taking forward the City Centre Connectivity Study, the specific resource implications are still to be determined in-line with the emerging programme of work. It is expected that the councils contribution to Phase 2 and 3 will be met from within existing department budgets subject to approval from the Committee at a future date.</p> |
| 4.0 | Documents Attached |
| | Appendix - <i>A Bolder Vision for Belfast</i> |

A BOLDER VISION FOR BELFAST

Reimagining the Centre

Draft

December 2019



Belfast
City Council



Department for
Communities



Department for
Infrastructure

Jacobs

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INTRODUCTION

A bolder Belfast is the City's vision to transform the centre of Belfast.

Like many coastal cities Belfast faces unprecedented challenges to build resilience and overcome the risks posed by climate change. At the same time it must also tackle a range of other challenges including how to improve its air quality and adjust to the needs of an aging population. Now is the time for bold decisions to deliver the changes we need. All of us must take individual responsibility if we are to achieve this transformation.

Fundamentally, this requires a significant re-think of how the City's streets and places are used to make them attractive, healthy, vibrant and accessible places where people want to be. Drawing upon our uniqueness we will protect and grow the diverse uses of the city centre which in turn will drive inclusive growth for the city centre.

The City has ambitious targets for sustainable economic growth and to enhance wellbeing for all, as set out in the **Belfast Agenda**. It sets out that "Belfast will be a city reimagined and resurgent. A great place to live and work for everyone". The centre of Belfast will act as the principal driver for this ambition. With a dynamic mix of land uses it will provide the catalyst for widespread change across Northern Ireland. However, in order to achieve sustainable and inclusive economic growth that responds to the underlying challenges faced by the City, a radical approach is needed to reimagine how the centre of Belfast works best for the people who collectively own it.

The dominance of the car in the centre of Belfast must end. Far too much space is devoted to an inefficient and unsustainable means of transporting people to and across the City, which we know significantly contributes to the problems of air quality, severance and inequality of access faced by those living, working and visiting the centre of Belfast.

A Bolder Vision for Belfast therefore sets out how a green, walkable, cyclable network of streets and places will improve health for all, revitalise the City's economy and restore a sense of collective pride in the centre of the City by the communities within and around it.

The Vision has been developed collectively by **Belfast City Council**, the **Department for Infrastructure** and the **Department for Communities** with broad stakeholder input. This reflects the overwhelming consensus that something fundamentally needs to change to realise the ambition and protect the collective interests of the city's communities and visitors.

It aligns to the underlying policy context of sustainable and inclusive economic growth, regeneration and accessibility for all that is set out in the **Regional Development Strategy**, the **Belfast Agenda** and the **Belfast City Centre Regeneration and Investment Strategy**. But it recognises that these policies and strategies do not go far enough to achieve the fundamental change needed to deliver on the ambitions of the **draft Programme for Government** to improve wellbeing for all by tackling disadvantage and driving economic growth.

As we set out in this Vision, there is no time for delay in making the bold decisions needed to achieve this ambition. **The time for a bolder Belfast is now.**

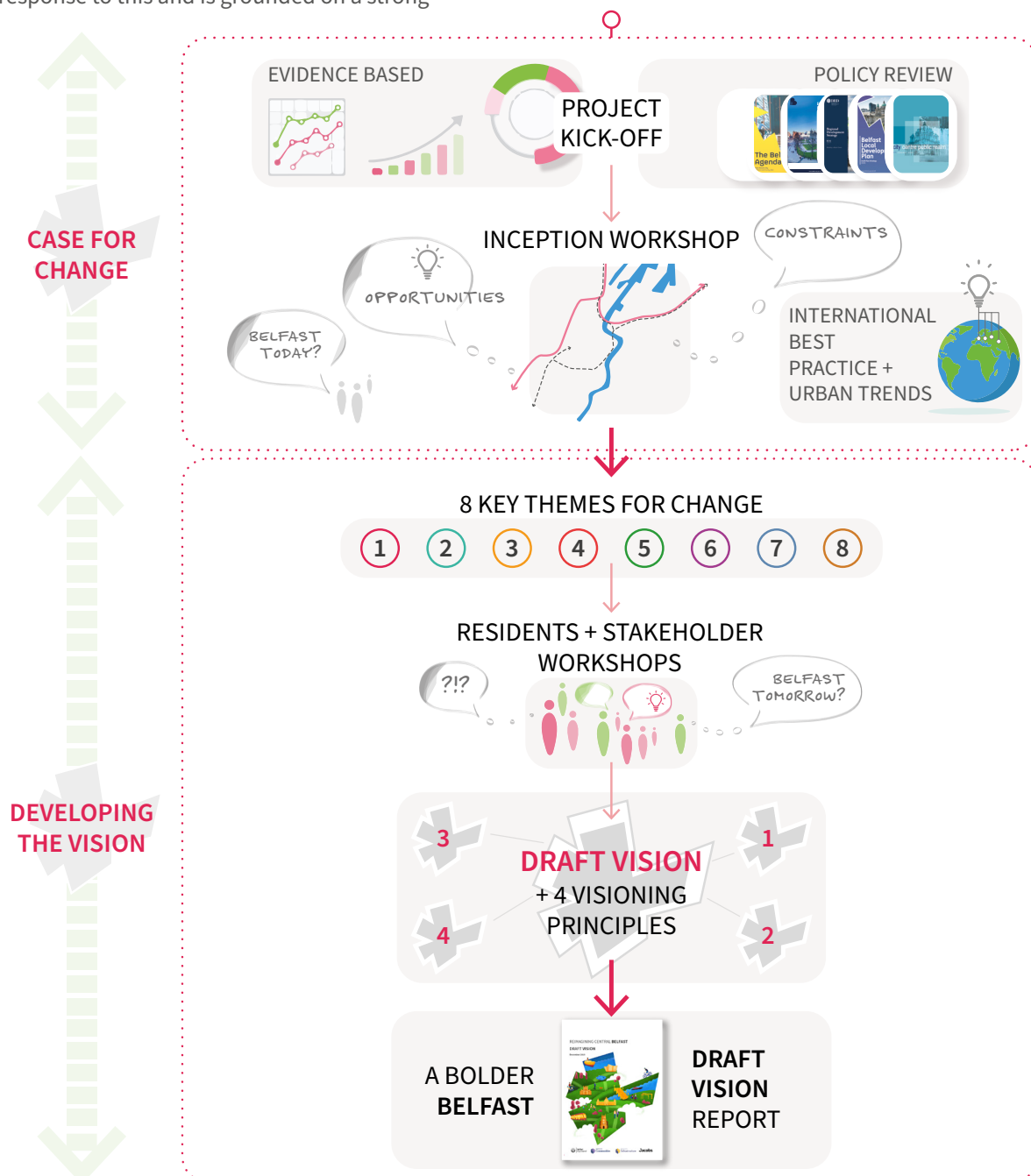


THE JOURNEY

Following the fire at the Bank Buildings in August 2018, Belfast City Council, the Department for Infrastructure and the Department for Communities agreed to work jointly to explore options to create a functioning and successful city centre. In parallel, a public debate developed around the uses and function of the city centre.

A Bolder Vision for Belfast has been produced in response to this and is grounded on a strong

understanding and agreement of the key problems and opportunities facing Belfast. As part of the journey, we have reviewed what other cities are doing to address similar challenges and considered existing local policies. This led to the identification of eight key themes which, through focussed engagement with stakeholder and community groups have been funnelled to four visioning principles which inform this Vision.





CASE FOR CHANGE



We must address the climate emergency

- The operation of our buildings, streets and places need to be more resilient
- We need to protect the city from an increased risk of flooding and other extreme weather events
- The poor air quality in parts of our city isn't acceptable or sustainable



Our streets are clogged with traffic

- Too many journeys are made by car often with only one person in the car
- Even with significant investment in public transport, car journeys are forecast to grow by 2030
- We need bold change to make space for prioritising walking, cycling and public transport to halt significant congestion and improve air quality



Our population is changing

- We will have more older people
- The student population is also increasing and we need to retain their talent
- These changes are placing new and growing demands on mobility and access to public services including housing, schools and healthcare



Our centre of Belfast is not accessible by all

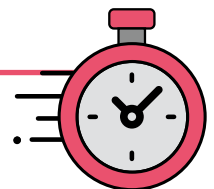
- We know that those with a disability make 39% fewer journeys than those without
- Roads and junctions have created physical barriers between communities and the city centre
- We must let people know that the city centre belongs to them and overcome issues around belonging



Our economy is changing

- The nature of high streets is changing. In Belfast, we have too many vacant retail units and need to diversify our streets
- Working patterns and employment opportunities are changing, but our business start-up rates are too low
- The city centre is diversifying its land use to improve conditions to live, work and visit

The Time is Now



Underlining all these challenges is one key opportunity: a growing recognition that something needs to be done.

Policy, strategy and public engagement are all moving in the same direction, and now is the time for Belfast to fundamentally change the way that its centre works for everyone and to protect the future of the city.

DEFINING THE PROJECT PRINCIPLES

The Visioning Principles below were developed from the eight themes for change, refined through Community and Stakeholder Workshops.

The eight key themes for the centre of Belfast have led to the selection of best practice cities across the globe to inform **A Bolder Vision for Belfast**.

Themes for change

Visioning Principles



City Centre as an Inclusive Place to Live, Work and Visit



Community Focused Regeneration



Prioritise Walking, Cycling & Public Transport



Remove Reliance on Car Travel



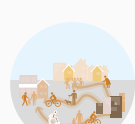
Active and Inclusive Public Realm and Green Spaces



Vibrant and Safe Streets



Embracing our Rivers



Overcoming Severance with Surrounding Communities



Creating a **healthy, shared, vibrant and sustainable environment** that promotes wellbeing for all, inclusive growth and innovation.



Fundamentally **changing** the centre of Belfast **to prioritise integrated walking, cycling and public transport** and **end the dominance of the car**.



Providing **lively, safe and green streets** linking inclusive shared spaces to promote resilience and enhance **our built heritage**.



Removing severance and barriers to movement between the centre of Belfast and the surrounding communities to improve access for all.

LEARNING FROM OTHER CITIES

Liverpool

Ambition

To improve social and economic activity in the city centre and riverfront as a result of de-industrialisation, and encourage in-migration to increase the residential population in Liverpool city centre.

How they realised their vision

Harness the local heritage, urban fabric and local culture to create a unique town centre environment; attractive creative industries, night life and city-centre living. Use of green corridors to tackle issues such as flooding, air quality, climate change and health and wellbeing through 'nature based solutions' - providing sustainable transport corridors and introducing nature into the city centre.



Oslo

Ambition

To create a greener and more inclusive city for all - a city with less cars to make way for a more vibrant and active city centre.

How they realised their vision

Needed to provide transport choice and develop an inclusive city centre. Adoption of Climate Budget 2020 following Paris Agreement built around transport, energy and buildings and Resource Efficiency, 42 measures quantifying emission cuts by 2020 and an exemplary public procurement.



Utrecht

Ambition

To become a world class bicycle city, where twice as many bicycle journeys are made towards 2030 and people of all ages can safely and comfortably access important nodes of the city cycling.

How they realised their vision

Walking and cycling prioritised and backed by policy and law to create a safe city centre.

Some central areas of the city are only accessible by bike, bus and foot, and private vehicles are not allowed.

Cycling routes as a way of connecting communities
Reconfiguration and redesign of roads to discourage car travel, and encourage behavioural shift to travelling by bike as an everyday occurrence.



THE VISIONING PRINCIPLES

“Creating a **healthy, shared, vibrant** and **sustainable environment** that promotes wellbeing for all, inclusive growth and innovation.

1

This principle is underpinned by the following **key themes for change**:



City Centre as an Inclusive Place to Live, Work and Visit



Community Focused Regeneration

Strengths



The **Belfast Agenda** sets ambitious targets for the city in terms of demographics and economic activity by 2035 as a regional capital. With the residential **population growing** by 66,000 residents, the centre of Belfast has a historical opportunity to be at the heart of that change and transform the urban centre.

The **availability** of vacant, derelict and underused land such as surface car parking, provides the platform to the city to be re-shaped. This is an opportunity to rethink our land use to create a vibrant and diverse city, with people who live, work, play and learn in Belfast City Centre in balance with visitors and surrounding communities.

Challenges



The centre of Belfast currently has **low levels of residential population** compared to the wider region. This is due to many reasons, including a lack of **community infrastructure** and **amenity spaces**, as well as a shortage of new housing and mixed use developments. A forecast increase in the student population and associated accommodation could also create an unbalanced demographic for the city.

The city is facing the challenge of maximising the value of educational institutions to **retain the young talent** by creating jobs that match their skills and vice versa.

“Fundamentally **changing** the centre of Belfast to **prioritise integrated walking, cycling and public transport** and **end the dominance of the car.**”

2

This principle is underpinned by the following **key themes for change**:



Prioritise Walking, Cycling and Public Transport



Remove Reliance on Car Travel

Strengths



A **re-balanced street network** offers a great opportunity to provide quality spaces that promotes walking, cycling and public transport to travel to/from and across the city. **Reduced levels of private vehicle** use give more space for people who walk and cycle and a more effective and reliable public transport network.

Easy **interconnection** between these transport modes is also essential. The enhancement and creation of interchange hubs around the city is an opportunity to transform the way people **move around and in and out of the city**, promoting walking and cycling for last mile journeys.

Challenges



Presently the public realm is vastly dominated by road traffic negatively impacting on wellbeing in a multitude of ways and generating an **unfriendly walking environment** and congestion, which undermines public transport reliability. There is a **disconnected cycle network**, that hinders cycling as a way to commute or simply as an everyday way of getting about.

The **public transport** routes often require users to go across the city. The wider availability and comparatively low costs of parking encourages continued reliance on private cars for travel in and out of the city.

“ Providing **lively, safe and green streets** linking inclusive shared spaces to promote resilience and enhance **our built heritage**. ”

3

This principle is underpinned by the following **key themes for change**:



Active and Inclusive Public Realm and Green Spaces



Vibrant and Safe Streets

Strengths



Currently the City Centre is seen as a shared space that has a large **availability of open space** in streets and public realm. This provides a rich opportunity to reimagine and re-design the public realm, building on the Open Spaces Strategy to create more inclusive, safe and vibrant open and green spaces with the integration of biophilic design. There is **potential to develop** vacant land in the centre of Belfast, and **through good design, provide the diversity in open space and land uses** that would create a more vibrant and safer environment. This needs to capitalise on the existing assets such as the **River Lagan and the built and natural heritage across the city**.

Challenges



The challenges identified highlight the **lack of activity outside of working hours**, which results in a perceived poor safety and secure environment. There is a general need for vibrancy and colour in the centre of Belfast's streets that would **attract activity** and strengthen the **sense of belonging**.

There is demand to deliver more leisure areas and high quality open spaces where people can exercise, play and rest. Both green and blue spaces should be enhanced and optimised using both soft and hard landscaping elements, further strengthened with **flood mitigation, SuDS and biodiversity**.

“**Removing severance and barriers to movement** between the centre of Belfast and the surrounding communities to improve access for all.”

4

This principle is underpinned by the following **key themes for change**:



Embracing our Rivers



Overcoming Severance with Surrounding Communities

Strengths



The success of the centre of Belfast depends on its relationship with the **surrounding communities** and the wider city. Improving connections across **existing severing infrastructure** is essential, and places like the new Transport Hub at Weaver's Cross have the opportunity to transform that.

Building on the city's **existing assets** is also key. Connecting the centre of Belfast with the River Lagan and the wider city can help to improve the **quality of life and wellbeing** in Belfast, as well as serve as a main **route for active travel**. Likewise, connecting further north to the Titanic Quarter can unlock further opportunities.

Challenges



One of the centre of Belfast's main challenges is overcoming severance built over the last decades. The **inner ring road and the motorway** form a double barrier hindering connectivity to the wider city and creates a social disconnect between communities and reinforces segregation. Junctions over the **Westlink** are busy and unfriendly for other modes of transport than driving. Also historically, the river has not been a point of attention as an industrial city, and some of the latest development does not address it appropriately. The challenge is to **transform** these places so that they connect people rather than divide neighbourhoods.

THE VISION

By 2035, the centre of Belfast will be a place where...

1

Healthy, shared, vibrant and sustainable environments



“...the centre of Belfast is a shared and climate resilient place where talent is nurtured, people of all ages choose to live, work and visit, benefiting from breathing clean air and climate resilient place.”

“

...where opportunities for sustainable investment and inclusive growth have been realised and everyone can move freely around, enjoying a wide choice of retail, leisure and cultural attractions.

”



2

Prioritise to support walking, cycling and public transport



“...walking and cycling are the most common and easiest ways to move around and through the centre of the city.”

“

...cars are an unusual sight and it is quick and easy to use sustainable transport to get to and from the centre of the city.

”



3

Lively, safe and green streets and our built heritage



“...people of all ages and abilities socialise in the many parks and leisure spaces, which now exist where there was once vacant land and car parks. Lively streets are welcoming and our historic buildings are celebrated and repurposed.”

“

...main streets are green, tree lined and full of people. They are safe and shared spaces and have a variety of cultural activities taking place within them. ‘Entries’ are enticing and fun spaces to be explored.

”



4

Removing severance and barriers to movement



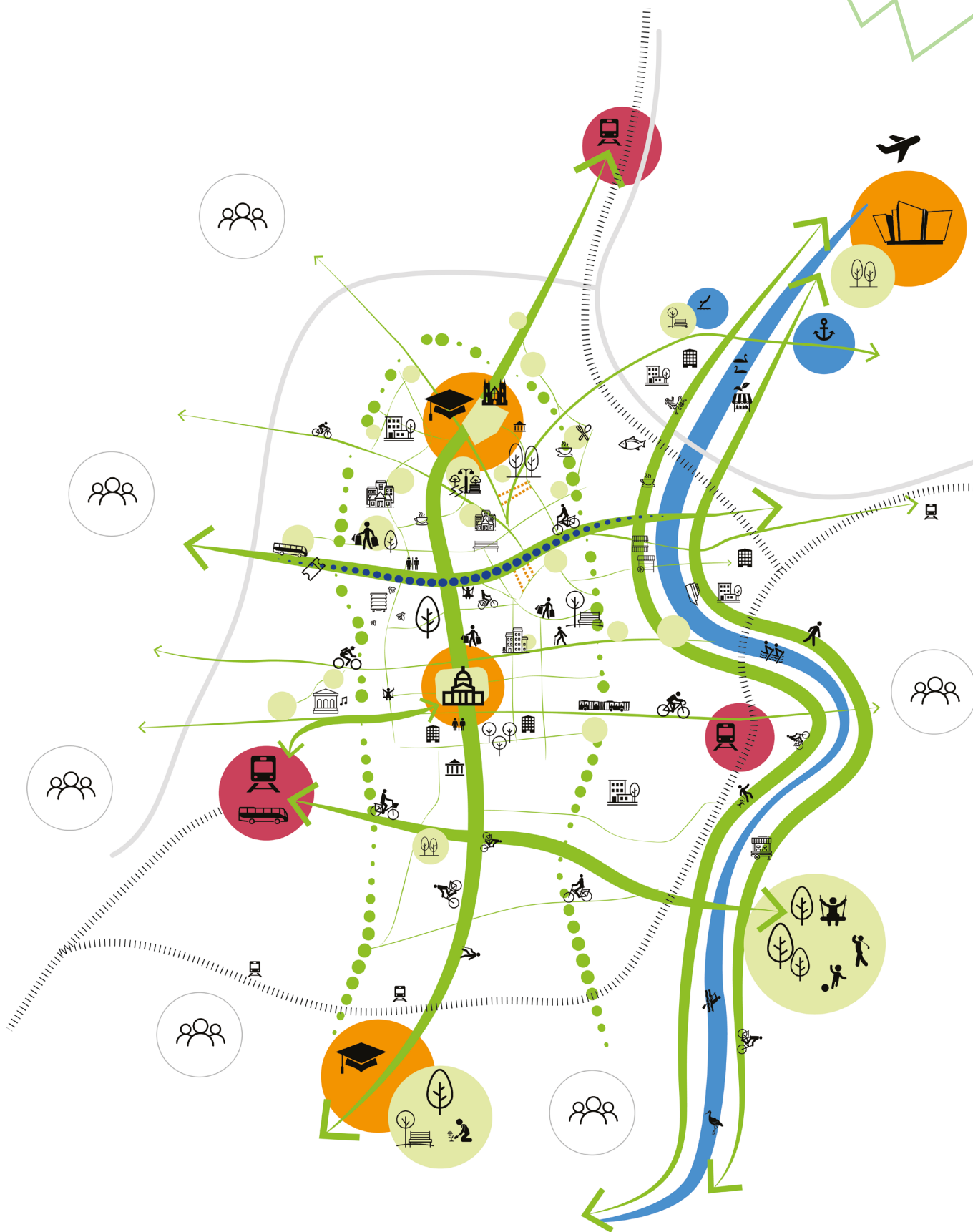
“...the River Lagan is well connected to the city core with multiple crossing points, and activities and attractions taking place on the river and along its banks.”

“

...the inner ring road is a linked network of parks, recreational spaces and green streets with many connections with the surrounding communities and the River Lagan.

”





...a bold vision has connected communities and realised transformational change.

WHAT IF...?

A Bolder Vision for Belfast establishes the principles required to adopt to deliver the **ambitions** we have for our city. The following concepts are transformational changes achieved by other cities and demonstrate what a bolder outlook for our City might be, through a series of ‘**What If**’ ideas.

These ideas were identified through the engagement events held, they have been benchmarked against our 4 Visioning Principles and are mostly intended to inspire potential solutions that will help deliver **A Bolder Vision for Belfast**.



Krakow, Poland

...the inner ring road became a circular park?



...the centre of Belfast was fully pedestrianised ?



Copenhagen, Denmark



Oslo, Norway

...the city centre became the first place in Northern Ireland to become carbon neutral?



...you could swim in the River Lagan?



Copenhagen, Denmark



Freiburg, Germany

...everyone walks, cycles and takes public transport?



...connections to our train stations were pedestrian friendly, easy and colourful?



Glasgow, UK

**CALL
TO
ACTION**

...EVERYONE WAS PART OF THE CHANGE ?

WHAT IF...?

...buildings were reimagined to celebrate our unique heritage?



Glasgow, UK



Perth, Australia

...public transport within the centre was free?



...car parks became places for people rather than cars?



Atlanta, USA



Utrecht, Netherlands

...we reconnected with the River Farset?



**...pedestrians and cyclists
always had priority?**



Madrid, Spain



Glasgow, UK

**...there were green decks
over the Westlink?**



**...the city centre became a place for
everyone to play?**



London, UK

**CALL
TO
ACTION**

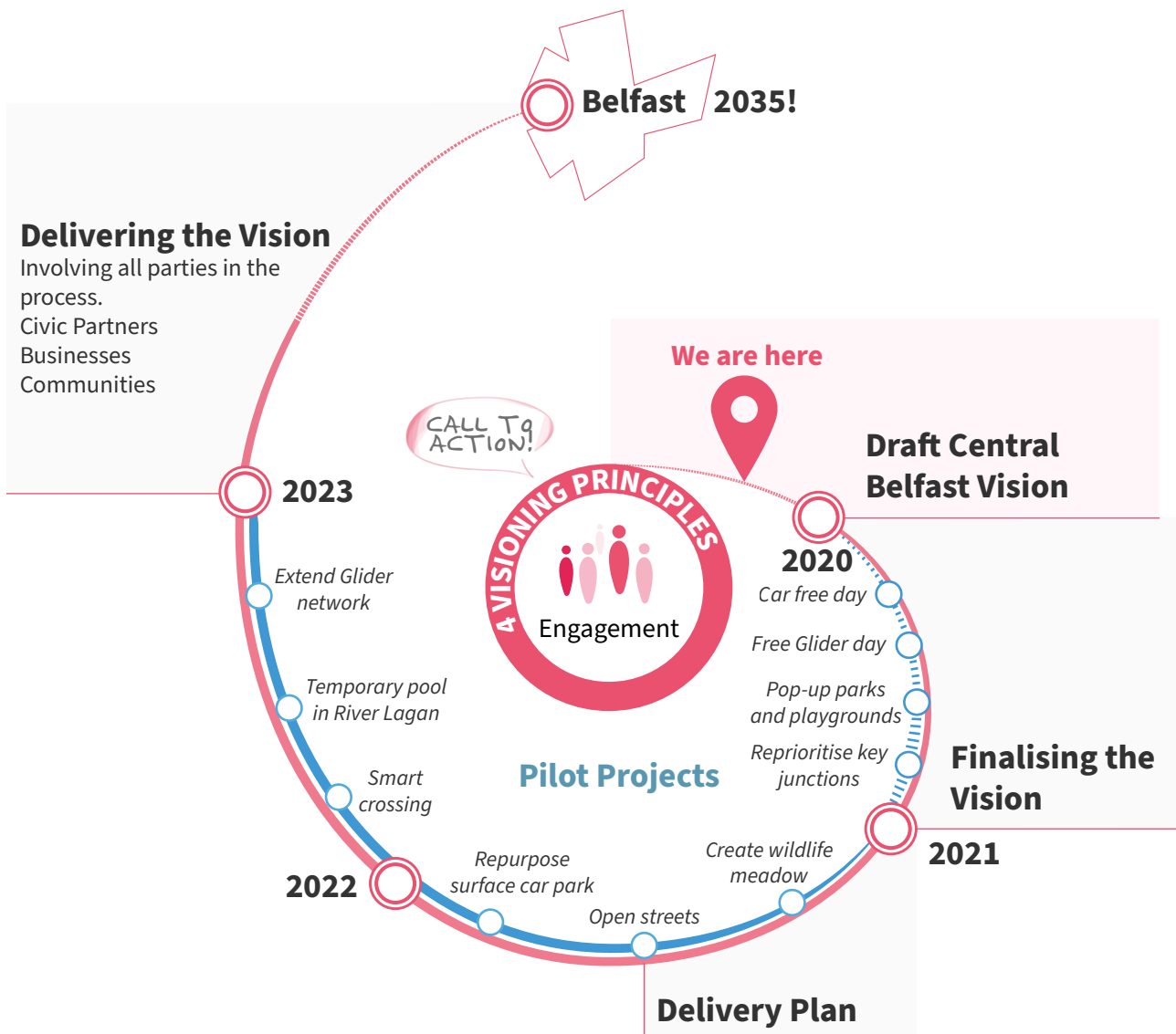
...EVERYONE WAS PART OF THE CHANGE ?

NEXT STEPS

To be truly effective, this Vision will need to be supported by policies and strategies at city and metropolitan levels. It is key that further stages of **A Bolder Vision for Belfast** are developed in close collaboration with the Local Development Plan team and other agencies responsible for development, regeneration, environmental, transport and community policies. Any potential interventions will mean different things to each partner organisation. We need to consider how it will transform what we do. This will be addressed in Phase 2 where we will outline pilot projects that will test and embed our Vision.

This Vision is the continuation of a journey for the city instigated with the Belfast Agenda and recent policies and strategies focusing on the centre of Belfast in 2035. Through continued public consultation and stakeholder engagement, the following stages will finalise the Vision around the Visioning Principles identified here. The Delivery Plan will be developed in coordination with this Vision, and it will set up the programme for the interventions with the most beneficial outcomes for the city.

Fundamentally, for this Vision to be successful we need **everyone to be part of this bold change.**





Belfast
City Council



Department for
Communities



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