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

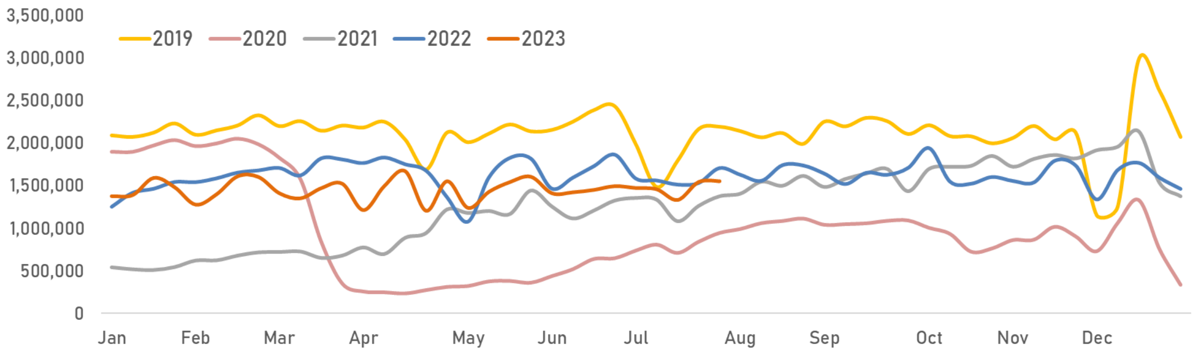
1. Footfall levels
2. Dwell Time
3. Number of unique visitors
4. Catchment area (visits from areas outside the city)
5. Rates income (domestic/non-domestic rates)
6. Perceptions of cleanliness and safety
7. Air quality within the city centre
8. Number of employee jobs within the city centre
9. Value of development (regeneration tracker)
10. Vacancy rate (number of vacant properties)
11. Independent retailers (number and proportion of all retailers)
12. Consumer spend
13. Value of tourism
14. City centre living population

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

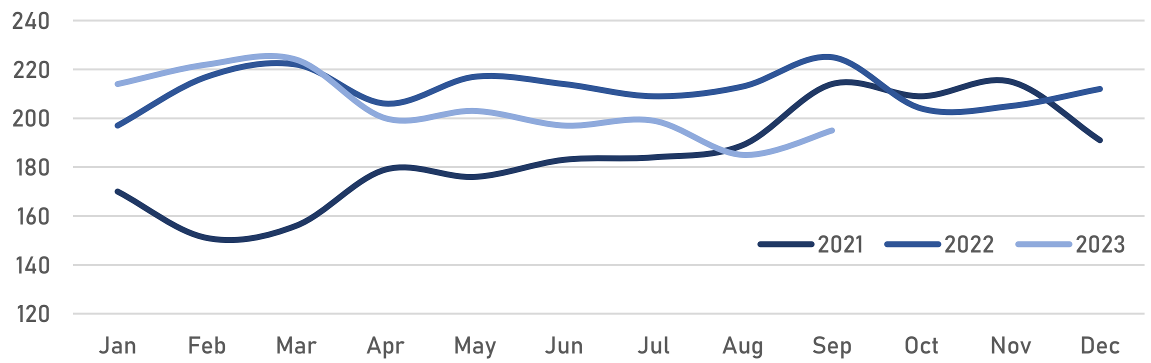
[2] The red dots refer to the six fixed-location cameras in the Primary Retail Core.

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).

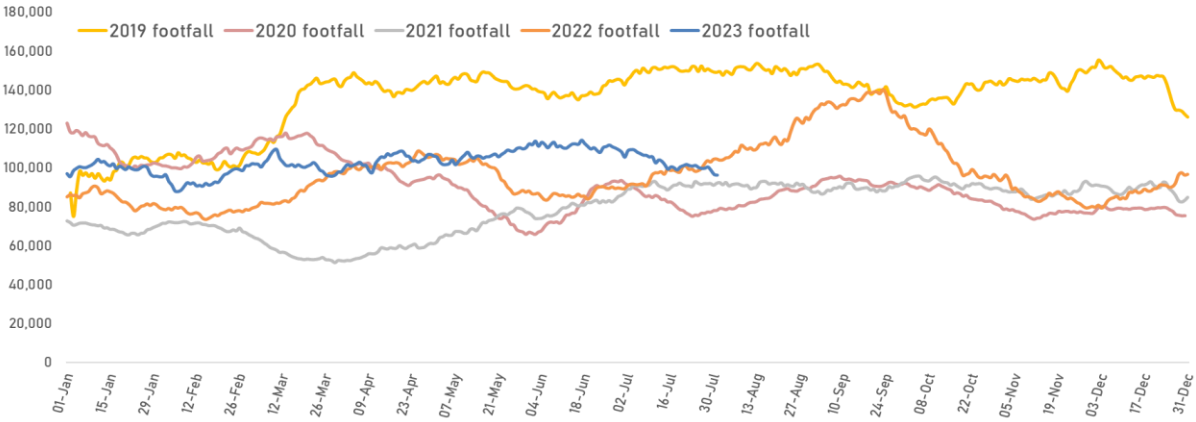
In September 2023, 60% of all visits to Belfast City Centre lasted at least 1 hour.

3. Unique Visitors

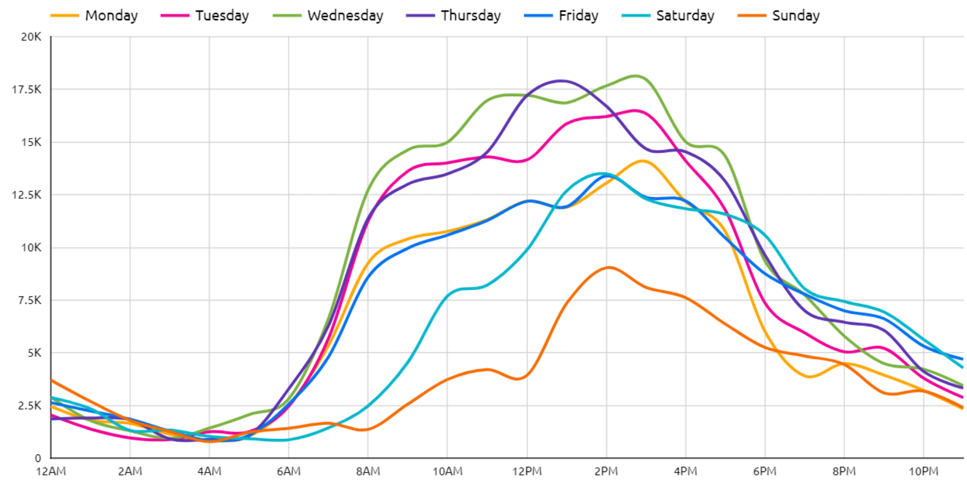
Definition: .The number of people (unique individuals) visiting Belfast City Centre.

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).

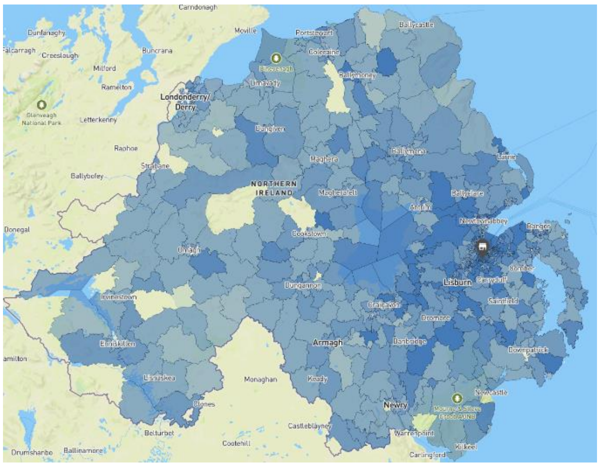
4. Catchment Area

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.

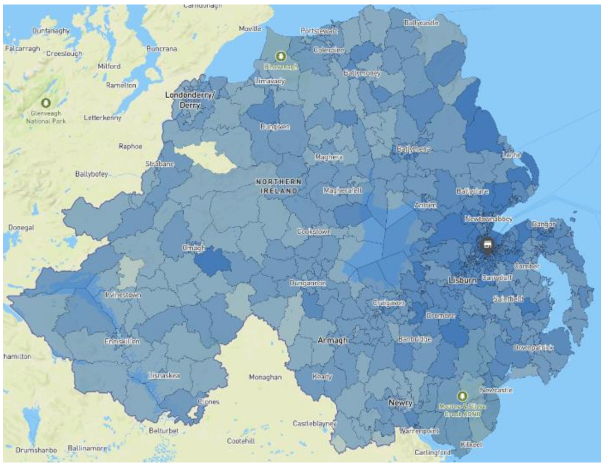
Baseline Position: In 2023 (year to date) the top 50 Super Output Areas (based on visitors home location) was responsible for 16.4 million visits from a total distance of 268km. In 2019, the top 50 SOAs accounted for 36.8 million visits from a total distance of 383km.

Performance Data:

2019



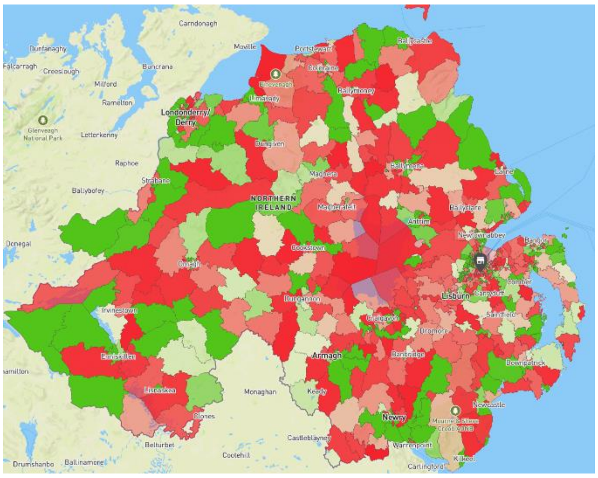
2023



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.

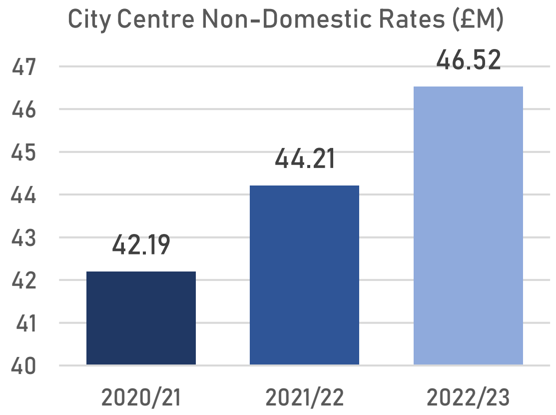


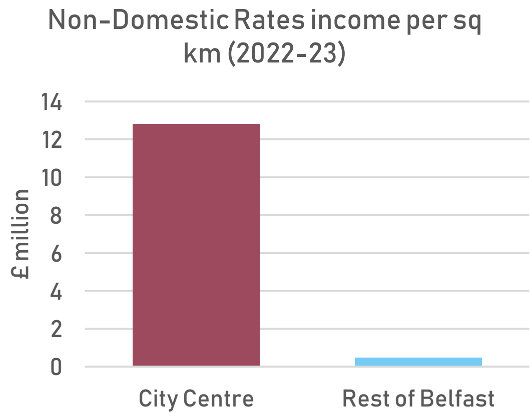
5. Rates Income

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:

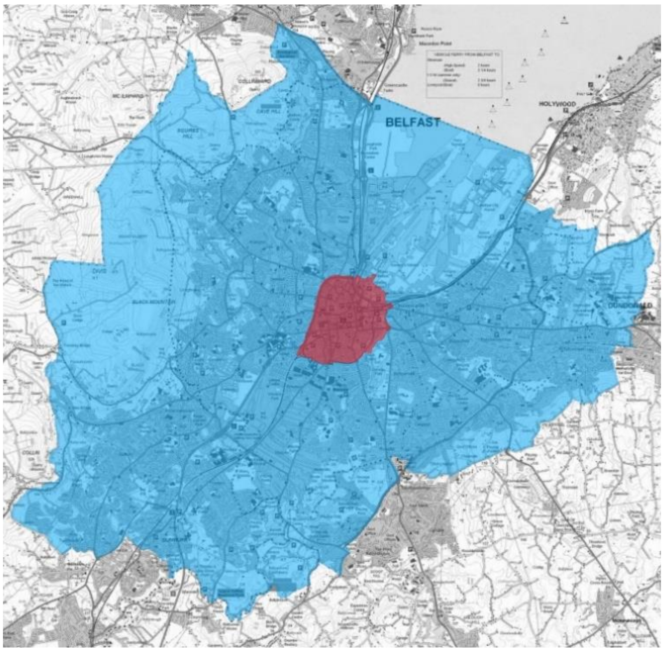




Data source(s):	LPS Valuation List
Geographical coverage:	City Centre (BMAP)[3]
Frequency of data collection:	Annual
Further information:	Domestic rates for the city centre are currently not available due to the format that this dataset is received from LPS. This remains a data development area and we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



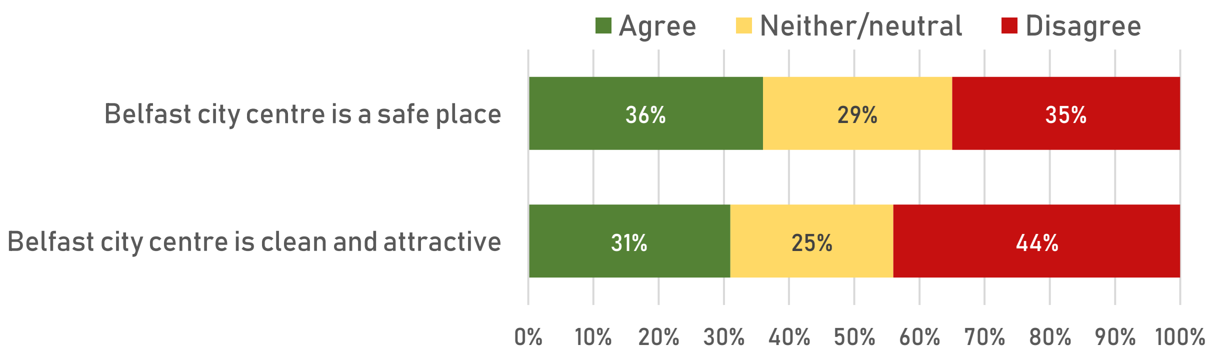
[3] The red shaded polygon represents the Belfast Metropolitan Area Plan City Centre area. The wider blue polygon represents the entire council boundary for context.

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:



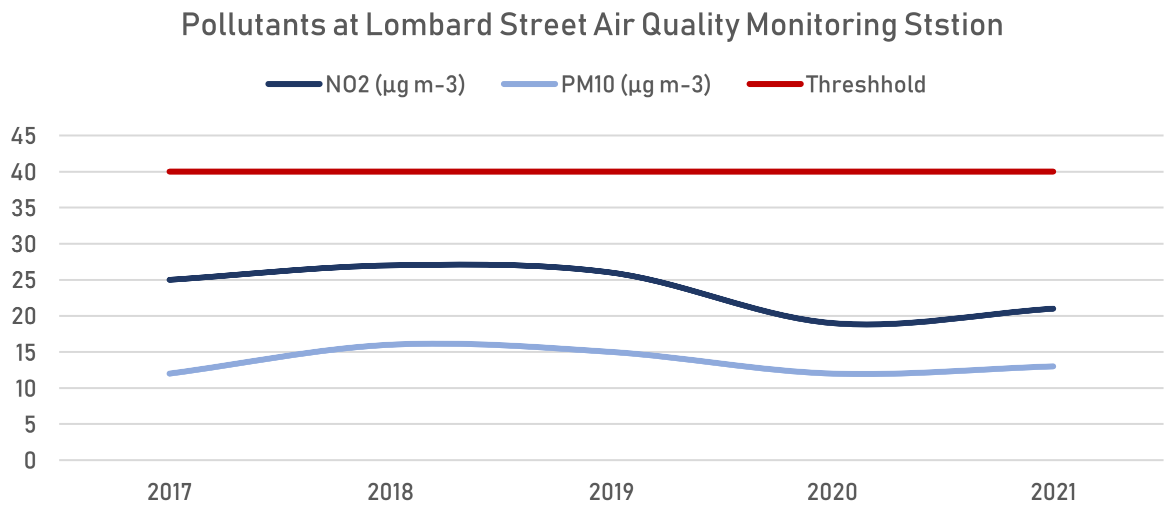
Data source(s):	Clean, Green, Inclusive and Safe Survey (undertaken by Belfast City Council)
Geographical coverage:	City Centre (BMAP)[3]
Frequency of data collection:	Ad hoc
Further information:	Fieldwork for the initial baseline survey was undertaken between 31 March and 14 May 2021. The results were 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/m³ in 2021, below the 40μg/m³ threshhold. Particulate Matter was measured at 13μg/m³ (again below the target threshhold).

Performance Data:



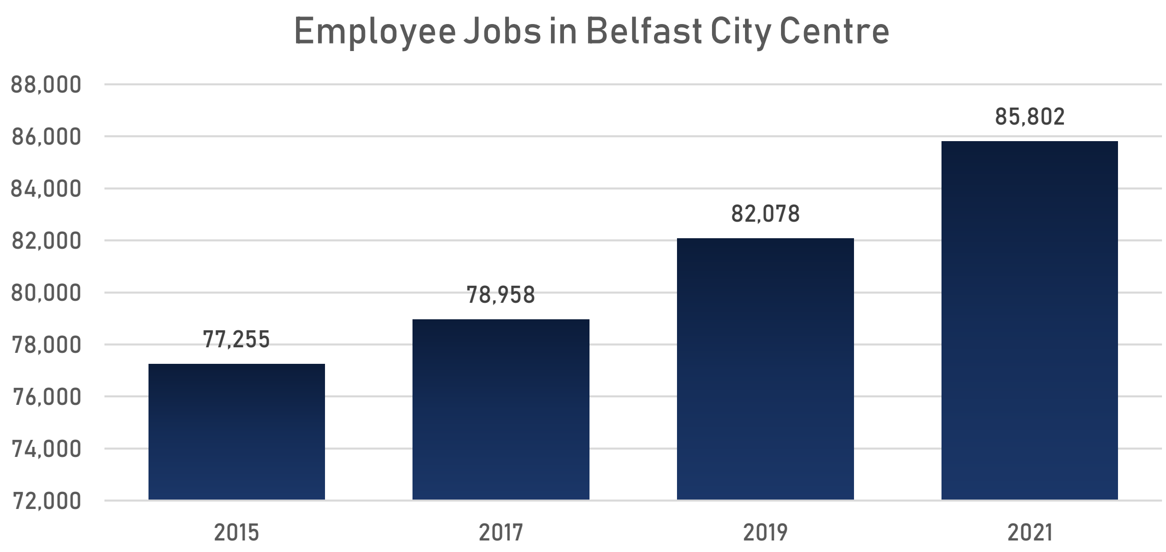
Data source(s):	Air Quality NI website, Department of Agriculture, Environment and Rural Affairs
Geographical coverage:	City Centre air pollution station at Lombard Street
Frequency of data collection:	Daily
Further information:	Air pollution results from the introduction of a range of substances into 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.

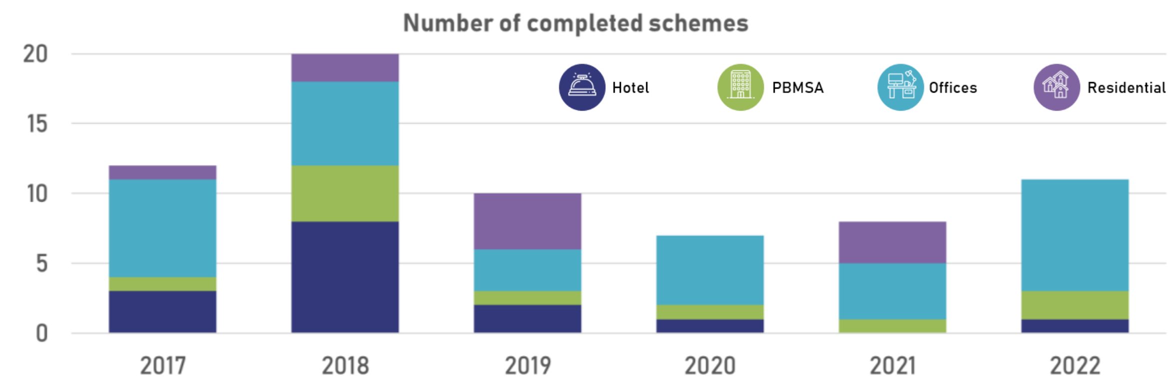
Insights: The majority of city centre jobs are in the Services sectors. Public Administration (Section O) accounts for 15,198 or 18% of city centre jobs ; followed by Administrative and Support Services (Section N) – 13,903 jobs (16%); Professional, Scientific And Technical Activities (Section M) – 12,369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

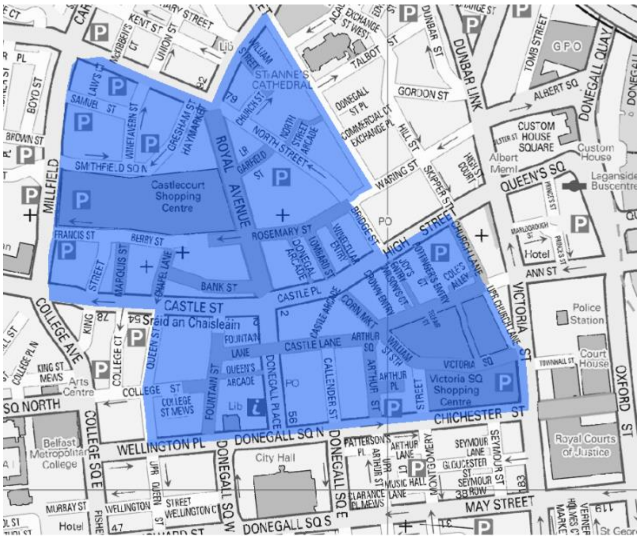
Further analysis of previous years' studies is currently underway and will be reported in due course.

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.

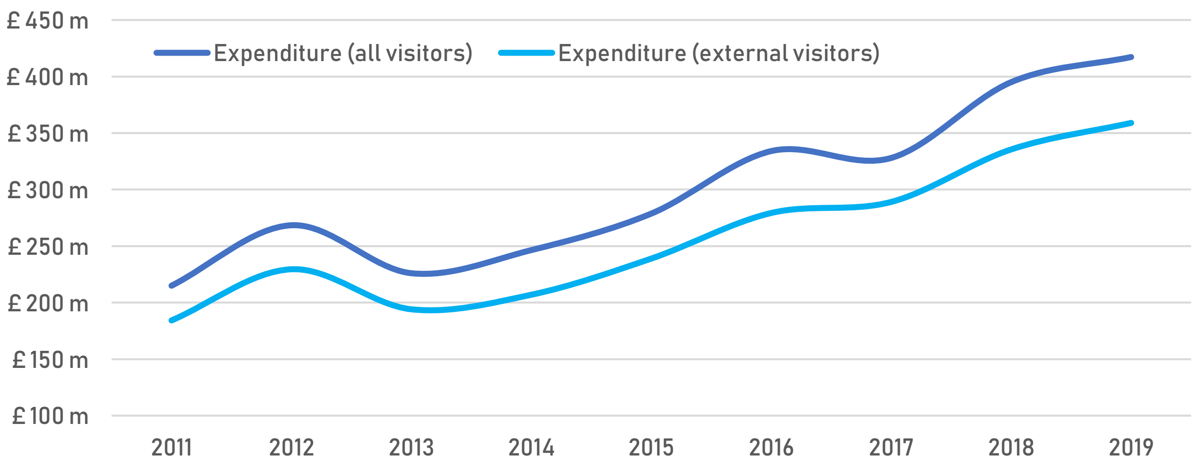
Data source(s):	TBC
Geographical coverage:	Primary Retail Core[2]
Frequency of data collection:	-
Further information:	The Belfast City Centre Regeneration and Investment Strategy includes a policy to 'Manage the Retail Offer' with the aim of addressing the retail decline of the centre through a targeted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