

INDEPENDENT SPECIALIST ADVICE TO UNDERTAKE A DETAILED RETAIL & LEISURE CAPACITY STUDY TO INFORM THE BELFAST LOCAL DEVELOPMENT PLAN 2020-2035

1. INTRODUCTION

The Council is seeking to appoint consultants to work collaboratively in partnership with the Planning Service - Local Development Plan Unit to undertake a Retail and Leisure Capacity Study that will inform the emerging Local Development Plan. The Council is keen to develop its knowledge and skills in this area of work, and wishes to work collaboratively with the Consultants to prepare the study to ensure that the Local Development Plan and decisions are informed by robust and up to date evidence in relation to future need and capacity.

2. BACKGROUND

The Council under the Planning Act (Northern Ireland) 2011 was given the responsibility for Planning on 1 April 2015. The Council assumed the power to prepare a Local Development Plan (LDP) for its district. The new Local Development Plan will be the land use plan for Belfast up to 2035 and will be the spatial guide to shape the future development of the city. It will replace the current Belfast Metropolitan Area Plan 2015.

The first stage of the LDP preparation is the Preferred Options Paper (POP) and associated documents, which was launched on Thursday 26th January 2017 for a 12 week consultation period that will close on 20 April 2017.

The Preferred Options Paper (or POP) provides the basis for consulting at an early stage with the public and stakeholders on a series of options for dealing with key issues in the plan area.

The POP sets out possible options for development and other key issues based on evidence, as well as the Council's preferred option and its justification.

The overarching objective is to continue to grow and the focus on growth underpins the four strategic aims to deliver the LDP vision and provide synergies with the Belfast Agenda:

- **Shaping a Liveable Place** – promoting development which enhances the health and well-being of communities, neighbourhoods and places.
- **Creating a Vibrant Economy** – a strengthened Belfast as the regional economic driver.
- **A Smart, Connected and Resilient Place** – improving connectivity supporting the efficient movement of people, goods, energy and information to create a dynamic innovative 21st century city attractive to investors, businesses, residents and visitors, and encourage the capacity for adaption to environmental challenges and the transition to a low carbon city.
- **A Green and Active Place** – a protected, enhanced and attractive natural setting comprising the surrounding hills, coastline, Belfast Lough and the Lagan Valley Regional Park by reinforcing their uniqueness and accessibility to all who live, work and enjoy the City.

The LDP is being prepared within the context of the NI Regional Development Strategy 2035 and the Strategic Planning Policy Statement for Northern Ireland 'Planning for Sustainable Development' (SPPS) 2015. The Regional Development Strategy 2035 (RDS) recognises the importance of accessible, vibrant city and town centres which offer people more local choice for shopping, social activity and recreation. In particular spatial framework guidance (SPG 3) identifies the need to enhance the distinctive role of Belfast City Centre as the primary retail location in Northern Ireland, and in relation to future major retail development proposals it promotes a precautionary approach based on the likely risk of out of centre shopping development having an adverse impact on the city centre area. The aim of the SPPS is to support and sustain vibrant town centres across Northern Ireland through the promotion of established town centres as the appropriate first choice location of retailing and other complementary functions, consistent with the RDS. The SPPS seeks to encourage development at an appropriate scale in order to enhance the

attractiveness of town centres, helping to reduce travel demand. In particular, policies and proposals must promote town centres first for retail and other main town centre uses.

The SPPS also states that the Local Development Plan should retain and consolidate existing district and local centres as a focus for local everyday shopping, and ensure their role is complementary to the role and function of the city centre. In these centres, extensions should only be permitted where the applicant has demonstrated that no adverse impact will result on town centres in the catchment.

The SPPS requires Local Development Plans to

- define a network and hierarchy of centres - town, district and local centres, acknowledging the role and function of rural centres;
- define the spatial extent of town centres and the primary retail core;
- set out appropriate policies that make clear which uses will be permitted in the hierarchy of centres and other locations, and the factors that will be taken into account for decision taking;
- provide for a diverse offer and mix of uses, which reflect local circumstances;
- allocate a range of suitable sites to meet the scale and form of retail, and other town centre uses.

The last major retail study undertaken for the Belfast Statutory Plan was the Belfast Metropolitan Area Plan – Retail Sector Study in 2003. It covered the greater Belfast metropolitan area to include Lisburn, Carryduff, Holywood, Newtownabbey and Carrickfergus.

Context

Belfast is the regional capital city and the major focus for administration, specialised services, commerce, cultural amenities, employment and development opportunities. It is the leading regional shopping centre and primary office location with the largest concentration of employment and commercial floor space in Northern Ireland. The City Centre is bounded by the inner ring road, an orbital boulevard and the east bank of the River Lagan between the Albert and Queen Elizabeth II Bridges.

The City Centre is a focal point for social and economic activity, and helps to define our collective sense of identity. It is an important neutral space within the city where people can meet. Therefore investment focused on enhancing Belfast City Centre's economic prosperity will raise the growth of the region as a whole as customers will travel further for a strong City Centre offering.

Belfast City Centre has a well defined retail area that is reasonably compact, with two shopping centres, Victoria Square and Castle Court, as well as prime retail frontage along Donegall Place and Royal Avenue. Whilst Belfast has a good representation of independent shops, long established national and multi-national businesses and higher end aspirational retail stores, prime rates have fallen as retailers choose secondary pitches and the core has suffered a number of vacancies.

The aims of strategic and regional policy are to support and strengthen the role of the City Centre as the primary retail location in Northern Ireland and adopting a sequential approach to development. Planning policy for the city centre is predominantly focused on protecting a strong retail core. The City Centre has a footprint floor space of 340,000sqm gross, in comparison to the Northern Ireland average of 68,800sqm gross (excluding Belfast). Belfast's catchment of 602,000 people places Belfast 13th out of 22 major cities in the UK.

However there are growing demands for the City Centre to accommodate office development, particularly Grade A offices, creative innovation industries, leisure, the hospitality hotel and cultural sectors, as well as housing a growing population. There is an opportunity to examine the potential of diversifying the retail core to incorporate potential leisure uses and community social facilities that could help to create a vibrant mix that would attract customers and visitors to stay longer in the City Centre. In particular to improve the evening economy; and develop a stronger Community Hub where people and families want to meet and spend their leisure time. The new Plan must therefore ensure that future development focuses on growing and diversifying of the City Centre; in particular identifying the appropriate mix and balance of retail and leisure uses within the retail core that will be responsive to changing retail trends and customer demands.

District Centres are located beyond the City Centre providing a mixture of retailing and services to the local community. They usually contain at least one food supermarket and non-retail services such as banks, building societies and restaurants. Other associated service and community uses such as libraries, clinics, leisure, and local offices are normally located within or adjoining district centres. Their scale and diversity of provision means that they can serve a wide catchment area and significant areas of the city. There are 7 district centres located at Connswater, Park Centre, Kennedy Centre, Westwood Centre, Cityside (Yorkgate), Hillview (Crumlin Road) and Dairy Farm, Stewartstown Road.

Local Centres are usually small groupings of shops, typically comprising a general grocery store, a sub-post office, occasionally a pharmacy and other small shops of a local nature. Local centres can provide an important community hub, which in addition to retail provision, may provide an accessible location for essential public services such as medical practices and libraries. There are two centres located at Dunmurry, Kingsway and King's Square, Dundonald.

Arterial Routes are small neighbourhood centres or commercial nodes of shops and services predominantly located along the arterial routes in the City. They tend to be dominated by retail services, food and drink outlets. They can help to maintain vital facilities and services of 'neighbourhood significance' and provide essential opportunities for day-to-day convenience shopping (bread, milk, fresh food and newspapers). Strong neighbourhood centres are important in supporting healthy communities through the promotion of social interaction and their direct impact on local economies, as they often comprise of businesses owned by, and employing local people. The Council has regenerated a number of arterial routes that has help to improve the retail frontages, which have helped the development of a vibrant local café culture with niche convenience retail offerings, reviving these neighbourhood centres as attractive community meeting places. Encouraging new retail facilities in designated Arterial Route locations and at Local Centres should therefore play a major role in their regeneration both physically and economically, and help sustain the local communities which they serve. There are 14 commercial nodes and 17 shopping/commercial areas on 18 arterial routes within the district.

Whilst district/local centres and commercial areas on arterial routes provide for consumers day-to-day needs, some suffer from vacancies, and poor retail offerings, with others over-trading and competing with trade in the City Centre. There is a need to assess the network of centres to define their extant and review the mix of uses to secure a balance of convenience retail, local services and leisure uses that meet the needs of the neighbourhood.

3. REQUIREMENT

A key purpose of this Study is to provide an assessment of retail and leisure needs and capacity in the period up to 2035, and to review the current performance of Belfast City Centre and other neighbourhood and local centres across the Council Area. This is of particular importance given recent fluctuations in the UK economy and changing technology that have had a notable impact on the retail and leisure sectors in general.

The Council is keen to develop its knowledge and skills in this area of work, and requires the Consultants to work collaboratively in partnership with the Council's Local Development Plan Personnel, to prepare the study to ensure that the Local Development Plan and decisions are informed by robust and up to date evidence in relation to future need and capacity.

The outputs from the study will inform the preferred Local Development Plan Strategy, which will provide the spatial framework to promote economic and population growth in the Council Plan area up to 2035. It will provide the evidence to guide the detailed planning policies for Town Centre - retail and leisure developments. The overriding objective of the study is to produce a robust, empirically based report that will stand up to detailed scrutiny and independent examination as part of the Local Development Plan process. The Study will be required to satisfy the "Soundness Test" applied by the Planning Appeals Commission who will be assessing the Local Development Plan. The report will be a key supporting document that will underpin the Council's future Town Centre, Retail and Leisure planning policies.

Study Objectives:

- To work collaboratively in partnership with the Local Development Plan Team to build capacity
- Review and analyse the existing amount of floorspace, type of uses and extent of retail and leisure activity of the City Centre, District and Local Centres including Arterial Routes within the Belfast Plan Area
- Define a network and hierarchy of centres - town, district and local centres, acknowledging the role and function of these centres; review of centre boundaries and frontages
- Define the mix and proportion of uses to provide a diverse offer to create a vibrant community hub, which reflect the different centres and local circumstances;
- Identify and appraise future retail and leisure development sites within and adjacent to the centres, and the capacity to accommodate identified needs. Define the timeframe for new retail and leisure floorspace to be provided within the plan period.
- Undertake a review of policies and advise on the Plan strategy and policy recommendations

4. MANAGEMENT AND REPORTING

The Council's lead Officer for the Study will be Conor Campfield, Senior Planner, who will be the main contact for day to day management of the work, and to perform the key Client Liaison role. The Consultant shall appoint a Project Coordinator who will be responsible for the day to day management of the Study and the main point of contact for the Client.

The Study will involve partnership working between the Council's LDP City Centre Retail and Leisure Team / Economic Initiative Team, / City Centre Regeneration Team, and the Consultancy Team. The Consultancy Team will be expected to meet regularly with the Council's Team in the preparation of the Study. This will include

- Initial Inception Meeting on Appointment.
- Regular workshop meetings (at intervals to be agreed)
- Local Plan Strategy Town Centre Retail Leisure Stakeholder Consultation Workshop
- Presentations and discussions of findings in the form of a draft report to the Council's Local Development Plan Steering Group, and to the Council's Planning Committee.
- Attendance at the Soundness Based Independent Examination.

The final report will be accompanied by an executive summary. Six paper copies and 1 electronic version on a memory stick will be required.

Timetable

The programme dates outlined below are indicative and subject to revision.

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| Submission of the Tender | no later than 3.00pm xx March 2017 |
| Confirmation of Consultancy Team Appointment | xx April 2017. |
| Inception Meeting | xx April 2017 |
| Workshops Meetings | Dates to be Agreed |
| Draft Planning Strategy Town Centre Retail and Leisure Stakeholder Consultation Workshop | Spring 2018. |
| Presentations and discussions of findings in the form of a draft report to the Council's Local Development Plan Steering Group. | Spring 2018 |
| Presentations and discussions of findings in the form of a draft report to the Council's Planning Committee. | Spring 2018 |

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| Attendance at Soundness Based Independent Examination (Plan Strategy) | Autumn 2018 |
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5. REMIT OF THE CONTRACTOR

The Consultant is required to work collaborative partnership with the Council's Local Development Plan Unit to prepare the Retail and Leisure Capacity Study to inform the Local Plan Strategy, and to provide a robust evidence base to pass the soundness test undertaken by the PAC during the independence examination of the Local Development Plan.

Proposed Scope of Works

| Ref | Task |
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| 1 | <p>Review Policies, Market Trends & Case Studies.</p> <p>To undertake an analysis of key Town Centre / Out of Town Development, retail and leisure trends. Reviewing the long term market trends, technological changes, the economic outlook and potential impact of government policies that could impact on growth and consumer expenditure.</p> <p>Undertake a comparative analysis to consider the appropriate mix of retail and leisure offer in the Council's Plan with successful towns of a similar size that have or are in the process of recovering from the economic recession / regeneration</p> |
| 2 | <p>Retail & Leisure Capacity Assessment</p> <p>To undertake an assessment of existing retail and leisure floor space and activity within the plan area. The assessment should take in to account the different retail and leisure sectors (convenience, comparison, durables, bulky goods etc).</p> <ul style="list-style-type: none"> • It will require the definition and analysis of the hierarchy of centres their existing main catchment and other sub-catchment (extent population and expenditure available by sector etc) and identification of any leakage. • Establish the extent to which the current retail and leisure provision satisfies the level and nature of consumer demand within its catchment; • Review the assessment of the vitality and viability "health check" indicators for Belfast City Centre, and the role played by the retail, retail services and leisure sectors in sustaining the vitality and viability of the city centre. Identify any gaps or issues that may be affecting economic / commercial viability. • Undertake an assessment of the vitality and viability "health check" indicators for the District and Local Centres / arterial routes, Retail Warehousing sites, and the role played by the retail, retail services and leisure sectors in sustaining the vitality and viability of these centres. Identify any gaps or issues that may be affecting economic / commercial viability. • Any likely changes in the catchments trading patterns, population, expenditure levels and turnover over the plan period should be identified and the implications considered for future retail and leisure planning for Belfast; • Analysis of amount and location of existing Retail and Leisure Floorspace to derive <ul style="list-style-type: none"> ○ Quantitative Capacity for Convenience Floorspace ○ Quantitative Capacity for Comparison Floorspace ○ Quantitative Capacity for Leisure Space |
| 3 | <p>Need for Additional Retail & Leisure Floorspace</p> <p>Assess the quantitative and qualitative scope for additional shopping floorspace within the different retail and leisure sectors within the Plan area up to 2035. The study should advise on the amount of additional floorspace, and where this should be located during the Plan period (taking into account the existing policies outlined in the Regional Development Strategy, the Strategic Planning Policy Statement and PPS5) and how and why it should be phased.</p> |

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| | <p>This will involve an assessment of Belfast City Centre, as a regional centre and the neighbourhood / local centres including the arterial routes to determine their capacity to accommodate new development, and advise on the appropriate balance of the diversity of uses, and any necessary qualitative improvements required.</p> <p>Quantify the scale and nature of changes in the additional floorspace that may arise in the light of potential increase in population, demographic changes, and forecast changes in retail and leisure expenditure. This should include changes in City Centre Uses, Convenience Goods Shopping Retail Warehouses .and District / Local Centres.</p> <p>The Council will be issuing a Call for Sites which will provide information on available sites for retail. This will assist in the identification of potential sites for the additional need for Retail and Leisure Floorspace within the Plan Area.</p> |
| 4 | <p>Policy Guidance</p> <ul style="list-style-type: none"> • Review the role played by the retail, retail services and leisure sectors in sustaining the vitality and viability of the city centre, District and Local Centres, to make recommendations on appropriate development control policies; • Define the Primary Retail Core / Primary and Secondary Retail Frontages and within the current guidance provided by the Regional Development Strategy and the Strategic Planning Policy Statement to make as appropriate detailed policy recommendations regarding their protection. • To advise on the appropriateness of the existing hierarchy of centres, shopping frontages and the need for specific development management policies. • Assess the relationships between existing and future out of town developments and town centres outside of the plan area, and recommend actions considered necessary to protect Belfast's role as a regional centre. |
| 5 | <p>Consultation</p> <p>Undertake Stakeholder consultations / workshops in conjunction with the Council's Local Development Plan Unit. The purpose is to obtain views on current levels of retail and leisure provisions and identify issues that need to be addressed in the Local Development Plan. Also to obtain views on future direction for creating vibrant City Centre and Neighbourhood District / Local Centres in the Plan Area.</p> |
| 6 | <p>Soundness Test – PAC Independent Examination</p> <p>The Study will be used as evidence by the Council during the PAC Soundness Based Independent Examination Stage. This will involve the preparation and presentation of evidence, to explain and justify the findings of the Study, to ensure that the Plan Strategy for Town Centres Retail and Leisure is robust to pass the soundness test during the independent examination stage.</p> |

6. REMIT OF THE COUNCIL

The Council will provide the following information

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| <p>Check List</p> <p>Town Centre Health Check</p> |
| Existing retail and retail service floor space diversity of uses - amount and location of floor space for different uses and how this is changing; |
| Proportion of vacant property street level & upper floors |
| Customers' existing views and behaviour and their future wishes |
| Retailer representation / profile : the existing composition , retailer demand and other potential changes; |
| Retailers' views: surveys of the views of existing town centre retailers; |

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| Pedestrian flows the number and movement of people on the streets, in different locations, at different times of the day or evening and over a period of time; |
| Accessibility - the ease and convenience of means of travel, including the frequency, penetration and quality of public transport services, the quality, quantity, location and type of car parking, and the quality of provision for people with a mobility handicap, pedestrians and cyclists; |
| Occurrence of crime |
| State of town centre environmental quality |
| Available Expenditure in the Catchment Area existing and future available expenditure forecasts |
| Household survey of shopping patterns to provide an up to date picture of shopping habits in the study area in order to identify the catchment area and the occurrence of under/over trading of convenience floorspace. |
| Analyse the quality of existing comparison and convenience retail provision and food and drink uses in the City Centre identifying any gaps in provision. Call for Sites – Retail and Leisure Use. |

(Note: above list will need to be refined with further discussions with Nora to determine further survey work through BMMC / BIDs One)

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