



Subject:	<b>Retail Analysis: Presentation by Pragma</b>
Date:	11th September, 2019
Reporting Officer:	Cathy Reynolds, Director of City Regeneration and Development John Greer, Director of Economic Development
Contact Officer:	Catherine McKeown, Regeneration Project Officer

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

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

<b>1.0</b>	<b>Purpose of Report or Summary of main Issues</b>
1.1	The purpose of the report is to: <ul style="list-style-type: none"><li>i. advise Members on a Retail Analysis Report that was undertaken for the Council by Pragma Consulting Limited; and</li><li>ii. to note that Pragma will provide a presentation at Committee on the key findings and high-level recommendations of the report.</li></ul>

<b>2.0</b>	<b>Recommendations</b>
2.1	<p>Members are requested to note:</p> <ul style="list-style-type: none"> <li>i. that the Council commissioned a retail analysis of Belfast City Centre to identify the key challenges facing the retail sector in the City centre and to inform an approach to address such challenges; and</li> <li>ii. that Pragma Consultancy Ltd will present the findings of this retail analysis to the Committee on 11th September.</li> </ul>
<b>3.0</b>	<b>Main Report</b>
	<p><b><u>Background</u></b></p> <p>3.1 In April 2018, Pragma Consulting Ltd was commissioned to undertake a Retail Analysis of Belfast City Centre to identify the challenges facing the city’s retail sector and inform recommendations on how best to address these challenges. The scope of the Retail Analysis was developed in conjunction with members from the Belfast Chamber of Trade and Commerce (BCTC).</p> <p>3.2 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 Belfast Agenda and the Local Development Plan process, which sets out how the city will develop over the period to 2035.</p> <p>3.3 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 <i>“providing a regionally competitive retail offer and a shopping experience that is unmatched anywhere else in Northern Ireland”</i>.</p> <p>3.4 However, in recent years the retail landscape across the UK and beyond has changed dramatically, with the retail sector facing a number of challenges and Belfast is no exception. Moving forward, Belfast must be cognisant of the significant trends and challenges impacting the sector, particularly given the significant number of people employed in this sector and its criticality to the economy of Belfast and the wider region.</p>

3.5 Pragma Consulting Ltd were commissioned to provide market intelligence on the sector and to identify opportunities and challenges within the city's retail offer. Their analysis assessed 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.

**Key Issues**

3.6 Pragma Consulting Ltd will present the key findings and recommendations to the Committee, which will include detail on the following:

- **Catchment and shopping patterns:** With Belfast being the major shopping destination in Northern Ireland, Pragma will benchmark its performance against comparable cities, provide an insight into Belfast's performance, and discuss its current retail offer and the challenges faced by retail including online shopping.
- **Trading Gap Analysis** is a realistic estimate of potential turnover growth which could be achieved by Belfast by improving the relevance and breadth of the current offer. Pragma will provide further detail in their presentation as to how this might be achieved.
- **Impact of the City Centre:** Pragma will outline the potential of Belfast's retail sector as the driving factor for city centre performance and development. They will examine the strengths of Belfast including the strong presence of the independent retailing sector, its general retail offer, tourism potential and the ongoing investment into the city including growing office and working space development and the increasing demand for city centre living, They will also highlight the challenges faced by retail including the shift away from physical bricks and mortar retail towards online shopping, the impact of the various administrations of popular high street brands and its implications on vacancy rates.
- **Recommendations:** To help address challenges and maximise the benefits the retail sector can bring, Pragma will identify and discuss a number of high-level recommendations and opportunities to help Belfast create a dynamic and experiential destination for shoppers, aimed at strengthening the economic, social and physical regeneration of the city centre. In order for Belfast City Centre to remain competitive, reviewing opening hours and legislation will improve performance and create an opportunity to attract new brands to sustain the viability of a mixed-use economy for

	<p>city centre. Alongside this enhancing the leisure provision, animating spaces and maximizing the tourism opportunity through the development of a new central tourist destination proposed as part of the Belfast Region City Deal will create a point of difference and be paramount in driving visits/footfall. Supporting city centre living, improving infrastructure and office/work space development will have positive impact on city centre vibrancy.</p> <p>3.7 Officers will bring a further report back to Members in the near future with detail on a Retail/High Street Action Plan and work programme aligned to the recommendations in the retail analysis and taking into account the view of Members following the Pragma presentation.</p> <p>3.8 Members will also be aware that Belfast City Council has recently obtained partner membership with the Institute of Place Management (IPM). The IPM is an international professional body that supports people committed to developing, managing and making places better. They have recently been appointed by the UK Government to lead the High Streets Task Force in England and deliver support to local authorities and communities who want to transform their high streets. Officers are currently working with the IPM to review the emerging action plans for the city centre to ensure alignment with best practice and to maximise the potential of priority projects to deliver the ambitions of the city centre.</p>
<p>3.9</p> <p>3.10</p>	<p><b><u>Finance and Resource Implications</u></b></p> <p>The cost of the Pragma commission was met by City Regeneration and Development budget 2018/19. The out workings of a Retail Action Plan, which will be brought back to Committee, will include an assessment of any budget implications.</p> <p><b><u>Equality or Good Relations Implications/Rural Needs Assessment</u></b></p> <p>Any emerging Retail/High Street Action Plan will be screened for Equality and Good Relations Implications/Rural Needs Assessment</p>
<p><b>4.0</b></p>	<p><b>Documents attached</b></p>
	<p>None</p>