



Subject:	Future City Centre Programme – Sundays in the City
Date:	4th March, 2020
Reporting Officer:	John Greer, Director of Economic Development
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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"/>

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

1.0	Purpose of Report or Summary of main Issues
1.1	The purpose of this report is to provide Members with feedback on the outcomes of a programme of engagement undertaken as a result of the Committee's decisions of 6th June and 11th September relating to Sunday opening and a range of associated issues.
2.0	Recommendations
2.1	The Committee is requested to: i. note the engagement process undertaken, in line with the Committee's decision of 11th September 2019, as amended by the Council on 1st October 2019;

	<ul style="list-style-type: none"> ii. note the issues and viewpoints expressed in the course of the engagement process, as set out in sections 3.8-3.12; and iii. note the options presented in section 3.13 and advise which they wish officers to take forward. These are: <ul style="list-style-type: none"> ○ Option 1: Agree to designate the city centre as a holiday resort, in line with the legislation as set out in the The Shops (Sunday Trading &c.) (Northern Ireland) Order 1997 and develop and support a programme of cultural animation and associated marketing. Subject to agreement on this option, a report setting out the proposed animation programme and the associated budgetary implications will be brought back to a future meeting of this Committee. ○ Option 2: Agree to designate the city centre as a holiday resort, with an agreement with local retailers and that affected retailers will open between 12pm – 6pm on 18 consecutive Sundays in the summer in line with the legislation as set out in the The Shops (Sunday Trading &c.) (Northern Ireland) Order 1997 and develop and support a programme of cultural animation and associated marketing. Subject to agreement on this option, a report setting out the proposed animation programme and the associated budgetary implications will be brought back to a future meeting of this Committee; and ○ Option 3: Do not support the designation of the city centre as a holiday resort, in line with the legislation as set out in the The Shops (Sunday Trading &c.) (Northern Ireland) Order 1997 but develop a programme of cultural animation and an associated marketing programme. Subject to agreement on this option, a report setting out the proposed animation programme and the associated budgetary implications will be brought back to a future meeting of this Committee.
3.0	Main Report
3.1	<p>Members will recall that, at the City Growth and Regeneration Committee meeting on 5th June 2019, it was agreed that: “a report be submitted to a future meeting setting out the Terms of Reference to progress proposals for designating the city centre as a “Holiday Resort”, taking into account issues beyond opening hours and outlining the extent of the associated consultation process”.</p>

3.2	<p>The terms of reference were presented to and approved by the Committee meeting on 11th September 2019. Following discussion at the October Council meeting, the final terms of reference agreed were:</p> <ul style="list-style-type: none">• To explore opportunities to drive additional footfall and spend by attracting new visitors to the city on Sundays• To identify barriers to accessing the city centre on Sundays (for those that wish to do so) and to engage with partners to develop collaborative solutions to address these barriers• To build an understanding of approaches in other cities and to develop learning that may be relevant for the Belfast context• To understand the socio-economic impact of any additional city centre animation activities on Sundays• To understand the impact that any change to opening hours may have on the city centre in terms of small and independent retailers, workers' rights and the effect on women and childcare, and footfall• To understand the investment required to encourage the additional visitor numbers to the city on Sundays and to build a business case to lever resources from partner organisations, in the context of the city revitalisation.
3.3	<p>Members will be aware that the "holiday resort" designation is set out in legislation under The Shops (Sunday Trading &c.) (Northern Ireland) Order 1997. The current Sunday opening hours for retailers with a sales footprint of 280 sqm or more are 1 pm to 6 pm on Sunday. The holiday resort designation is not about de-regulation of Sunday opening hours. Instead, it permits those larger retailers to open on up to 18 Sundays between 1st March and 30th September (excluding Easter Sunday). The Council is responsible for designating the area to be covered by the "holiday resort" status and maintaining a register of shops proposing to open. During earlier engagement with traders, some businesses had indicated that they would be keen to open at the earlier time of 11am. However the council has the authority to agree any revision to the opening times.</p>
3.4	<p>The need for a targeted and focused approach to driving the economic, social and cultural regeneration of Belfast City Centre was recognised through the Belfast Investment and Regeneration strategy, developed and adopted by the council and other partners in 2015. Subsequently, work has been ongoing to move forward on the eight themes and priorities</p>

outlined in the strategy. Within the council, the structural changes – bringing together a range of complementary disciplines with the Place and Economy department – have brought a focus to that work. Officers have developed a programme of work called the “Future City Centre” programme which aims to create a dynamic and experiential destination for shoppers and bolster Belfast as the dominant retail and leisure destination in Northern Ireland.

3.5 The engagement exercise for the “Sundays in the City” programme clearly acknowledged that it would require more than single, stand-alone interventions to increase the usage of the city centre on a Sunday. Based on the agreed terms of reference, the engagement programme – which took place between October 2019 and January 2020 – included the following elements:

- Online public consultation – this involved using the council’s online engagement portal (Citizenspace). The consultation was open for eight weeks and closed on 17 January 2020. It attracted 1440 responses, more than 70% of which came from Belfast residents
- Market research – we engaged in a series of survey-based market research exercises targeting users of the city (including workers), NI residents and out of state visitors to Belfast
- Focus groups: we held focus groups with a number of key demographic and target groups including old people, young people, disabled individuals, family groups and city centre businesses
- One to one meetings: senior officers held a series of one to one meetings with key statutory partners (DfC; Tourism NI; PSNI), business organisations (including Retail NI; NI Retail Consortium; Belfast Chamber; Hospitality Ulster; NI Hotels Federation), trades unions (USDAW and Prospect) and other interested partners including the Interfaith Forum.

3.6 In terms of who currently uses the city centre on a Sunday, the research drew out a range of key points:

- Currently on a Sunday, an average of 50,000 visitors come to the city centre. This is less than 50% of the user numbers that access the city on a Saturday and is in line with the volume of day trips on a Monday to Friday (excluding workers)
- Those coming to the city on a Sunday do so mainly in order to shop, to eat out and to socialise with friends. Residents and visitors from NI typically spend an average of £135 per visiting party or group, while those from ROI our other out of state visitors

spend around £200 per visiting group. This means that Sundays in Belfast city centre generate an annual economic return in the region of £160million

- The majority of those using the city centre on a Sunday visit monthly or less often. However young people are likely to be more regular visitors, with 61% of those aged 34 and under coming into Belfast at least once a month. This is generally in keeping with the user profile of the city centre which appears to decrease with age
- Most visitors will spend between two and four hours in the city centre on a Sunday. More than half of them arrive between noon and 2pm. This footfall pattern is clearly linked to the current 1pm opening time for the large retailers. It is different from all other days of the week, where footfall tends to broadly follow a similar pattern of a gradually increasing profile up to a peak period of 12pm to 3pm and then tapering off.

3.7 In line with the terms of reference, some of the key issues emerging from the consultation exercise include:

3.8 Opportunities to drive additional footfall and spend by attracting new visitors to the city on Sundays

- Across all of the market research work and the online consultation, the main reasons why people currently visit the city centre on a Sunday are to shop, to eat and drink and to socialise with friends
- When asked what would attract new visitors to the city, there was a broad range of suggestions including:
 - Extending the retail opening hours
 - Providing more cultural activities
 - Extending opening hours for cultural facilities
 - Providing more family-friendly activities
- There was a general consensus that there was no one single factor that could act as a catalyst for increasing usage levels in the city centre on a Sunday. Rather, the range of views expressed suggested that any interventions need to be multi-faceted, taking account of the interests and needs of the range of users
- Those interested in extending retailing hours were keen that this would involve not only the major retailers (i.e. those that can only open 1pm-6pm currently) but also the smaller companies. While many of these can open, only around 30% choose to do so at present, suggesting that the large retailers remain the key drivers of footfall on a Sunday

- St George's Market is the biggest draw after the major retail offer: many respondents supported more market-based activity across the city
- There is already a significant number of visitors staying overnight in the city's hotels (average 6000 visitors on a Sunday evening). Many respondents felt that there were opportunities to attract additional spend on local hospitality and food offer, given that many stay on a room-only basis
- Many respondents supported additional investment in cultural activity – including events – in order to drive additional footfall. However there was some concern among the cultural sector in particular at the view that additional cultural programming alone can deliver the desired increase in footfall and spend. They considered that this piecemeal approach would not be sustainable
- There was also a consistent view that there needed to be a more coordinated approach to marketing, taking account of the key audiences. Many felt that there was already a significant range of activities taking place in the city centre but that, for a number of factors, the communication around these activities could be enhanced
- While many families do visit the city on a Sunday, factors such as lack of play facilities/open space, expensive/irregular public transport schedules and presence of too many cars were all cited as deterrents. Families did welcome initiatives such as our engagement hub which was organised to support the Christmas campaign – and attracted more than 5,000 visitors over the month-long programme.

3.9

Barriers to access

- There do not appear to be any specific structural barriers preventing people accessing the city centre on a Sunday. Rather those who do not come in on a regular basis say that the reason for this is that there is nothing in the city centre to attract them or that the range of activities on offer is inadequate. When asked what else they do, many note that they are simply busy doing other things
- Many people expressed some concern around the public transport provision on a Sunday and noted that this was a factor in their decision not to visit the city. Families, in particular, noted that one of the key reasons why they did not come into the city centre was because of their concerns about the volume of cars on the road. This is reflected in the figures suggesting that most people access the city by car on a Sunday
- There was considerable interest in exploring opportunities for pedestrianisation – or at least temporary closure of some roads – in order to facilities access for activities such as sporting events and additional markets

- Many people noted that they simply were not aware of what was on offer so they did not consider visiting the city on a Sunday.

3.10 Learning from other cities

Our research into approaches in other cities identified a range of initiatives that were being undertaken in order to driven spend and footfall on a Sunday. However it is important to note that these cities operate within a different licensing and regulatory environment. As such, it is not simply about organising activities or programming – it is important to understand the role of licensing and also to take account of different cultural practices in other locations. Innovative ideas that may work in the Belfast context include:

- Dublin: The Business Improvement District (BID) in Dublin has been proactively working to compete with the out-of-town shopping centres. To do so, it has developed a number of tactical interventions focusing, in particular, on the family market. This has included subsidies on public transport (family day travel pass for €10), kids activities in public spaces, pop up cinemas and collaboration with restaurants and entertainment venues to develop new promotional activity and special Sunday deals
- Manchester: Manchester has previously celebrated an “In Town Without My Car” Day. Conducted on a Sunday, parts of the city centre were closed to motor traffic. The aim of the event was to encourage people to consider more environmentally friendly methods of travel, such as public transport, walking or cycling. The traffic was replaced by the bustle of an arts and crafts market, live music, street theatre and roving entertainers. The approach combined entertainment to drive city centre footfall on a Sunday with social issues around civic responsibility. This approach has been tried in Belfast through the Ciclovía event which is scheduled to take place on 29 March 2020 and which will end up in the city centre
- Preston: a new monthly street market is now staged in Preston city centre as part of a major drive to bring in more visitors to the city, with key thoroughfares being closed to traffic. The market feature unique creators, makers, designers, producers, bakers, musicians and artists, and Preston producers and local market traders are invited to take part. The council has also revised licensing hours for some activities to extend these to later in the evening – particularly for live music and dance performances.

3.11 Understanding the socio-economic impact of additional activity on Sunday

- Our research suggests that Sundays in the city are currently worth around £14million a month in terms of spend on goods, services and activities consumed in the city centre

- Large and small businesses felt that opening earlier would provide them with more opportunities to generate sales, target new customers, visitors and tourists as well as enabling staff to access more flexible working hours. It has not been possible to quantify the additional economic impact that this would generate at this point and, in line with the wider engagement, it is clear that those wishing to come into the city consider that it should not be additional retail alone that will drive additional footfall
- Clearly the opening hours of the large retailers (as set out in the legislation) has an impact on footfall levels in the city centre and also drive the behaviour of small businesses (that could open earlier if they wanted to do so)
- Numbers using the city centre on a Sunday are currently less than half those coming into Belfast on a Sunday. Examples from the other locations suggest that the variation (between Saturday and Sunday) is less significant than in Belfast
- While many people support additional cultural activity in the city centre on a Sunday, the majority of the cultural institutions are not currently open on a Sunday. This is due to having to manage very tight budgets. However institutions such as the Ulster Museum have changed their opening hours, opening on a Sunday and closing on a Monday, in line with consumer demands, and this is reflected in very strong user numbers on a Sunday
- With regard to city centre workers, twice as many see extended trading hours as a positive rather than a negative (45% versus 22%), with 30% foreseeing no impact at all, according to our survey. Members will be aware of recent press coverage from USDAW regarding a survey of their members which suggests that 92% do not support any extension of Sunday trading hours
- The spend by out of state visitors is significantly higher than that for Belfast and NI visitors - £200 per party versus £135 per party. Given that Saturday night is already the busiest night of the week in the city's hotels, the importance of the visitor economy to the city centre's success cannot be underestimated. Feedback from visitors to the city suggests that the lack of things to do on a Sunday is a negative point regarding the city's offer to tourists.

3.12 Understanding the impact that any change to opening hours may have on the city centre in terms of small and independent retailers, workers' rights and the effect on women and childcare, and footfall

- Currently, only 30% of businesses that can open on a Sunday in the city centre (those in specific categories or with a footprint of 280 sqm or less) do so. The majority of those that do open align their opening hours with the 1pm opening of the larger stores

- Only 2% of businesses felt that they would be negatively affected by a change in opening hours; 30% felt that they would be very positively impacted
- As detailed above, twice as many city centre workers see extended trading hours as a positive rather than a negative (45% versus 22%), with 30% foreseeing no impact at all
- Younger respondents and males were less likely to perceive any negative impacts associated with working on a Sunday: 30% of females interviewed saw this as a positive; 39% considered there would be no impact and 31% felt that this would have a negative impact on them
- The footfall profile confirms that there is a significant increase in footfall between 12 and 2pm, in line with the current opening hours. Traders also confirm that the period between 1 and 2 is generally one of the busiest of the Sunday trading period, given that many people come to town for the purpose of shopping.

3.13 Taking account of the commentary gathered as a result of the engagement exercise, there are a number of options for Members to consider:

- **Option 1:** Agree to designate the city centre as a holiday resort, in line with the legislation as set out in the The Shops (Sunday Trading &c.) (Northern Ireland) Order 1997. This will enable larger retail stores with a retail footprint in excess of 280 sqm wishing to do so to open on up to 18 Sundays between 1 March and 30 September, with a recommendation that the earlier opening time of 11am is introduced and the current closing time of 6pm is maintained. In addition to the retail opening, it is proposed that a programme of cultural animation and an associated marketing programme is developed with the aim of driving additional footfall into the city centre. Subject to agreement on this option, a report setting out the proposed animation programme and the associated budgetary implications will be brought back to a future meeting of this committee and engagement will take place with retailers to consider the date from which the designation will take place and secure agreement on opening hours (note: the area cannot be officially designated until one month after the council decision)
- **Option 2:** Do not support the designation of the city centre as a holiday resort, in line with the legislation as set out in the The Shops (Sunday Trading &c.) (Northern Ireland) Order 1997. Develop a programme of cultural animation and an associated marketing programme with the aim of driving additional footfall into the city centre. Subject to agreement on this option, a report setting out the proposed animation programme and

	<p>the associated budgetary implications will be brought back to a future meeting of this Committee.</p> <p><u>Financial and Resource Implications</u></p>
3.14	<p>The resource implications of this work will be dependent on the preferred approach agreed by the Committee. Any activity will have to take place in the context of existing council and partner budget commitments.</p> <p><u>Equality or Good Relations Implications/Rural Needs Assessment</u></p>
3.15	<p>An equality screening process has been undertaken as part of the consultation process.</p>
4.0	Documents Attached
4.1	None