



Subject:	Presentation – Javelin Retail Impact Study
Date:	12 October 2016
Reporting Officer:	Nuala Gallagher, Director of City Centre Development
Contact Officer:	Michael McKenna, Urban Development Officer

Is this report restricted?	Yes	<input type="checkbox"/>	No	<input checked="" type="checkbox"/>
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 update Members on the findings of a recent Retail study undertaken by Javelin Group. The study was commissioned to inform the Council's approach to delivering the City Centre Regeneration and Investment Strategy and improve our understanding of the ongoing challenges facing the city's retail sector. The Retail study supplements the original Javelin report undertaken for Council in 2015.
1.2	Javelin will present to committee the report's key findings.
2.0	Recommendations
2.1	The Committee is asked to: <ul style="list-style-type: none">Note the findings of the report, particularly the ongoing challenges faced by the city centre and the need to continue work to support city centre retail
3.0	Main report
3.1	<i>Background</i> To help us fully understand the key issues facing City Centre retail issues and what impact they are likely to have on the City Centre, Council recently asked Javelin to undertake a further retail study as an addendum to their 2015 retail positioning piece focussing on:

3.2	<ul style="list-style-type: none"> • Current catchment and shopping patterns • Impact of the changing retail landscape • Department store analysis – importance of anchoring on retailer performance and their impact on venue performance • Future shopping patterns <p><i>Key Issues</i></p> <p>Javelin will present the report’s key findings to committee which will include:</p> <ul style="list-style-type: none"> • Belfast’s retail ranking • Retailer sales performance comparison • Access to the catchment area • Retailer presence • Future scenarios • Other key issues for city centre retailing
3.3	<p><i>City Centre Retail developments</i></p> <p>Work is ongoing to manage and support the city centre retail offer in line with the aspirations of the City Centre Regeneration and Investment Strategy. The Royal Exchange development continues to have a live planning consent for major retail-led development and Council are considering how best to bring this development forward.</p>
4.0	Appendices – Documents Attached
4.1	None