



ESSENTIAL TRENDS

BID Market Intelligence

ISSUE 102

FIGURES FOR MARCH 2019

ESSENTIAL
EDINBURGH



Introduction

Welcome to our latest edition of **Essential Trends**, reporting on Edinburgh's footfall during March and April and the retail and hospitality figures for March.

There is no doubt that this month's Essential Trends contains some interesting and contrasting figures. March saw a decrease of over 4% in our city centre footfall when compared to the same period last year and April saw a decrease of over 3%. A larger increase in the Old Town and other areas contributed to a very welcome footfall increase

for the whole city of 5.3% in April.

Sales figures followed this trend with a welcome near 3% increase in March, outperforming both the rest of Scotland and the UK. Hospitality sales showed a significant 12.6% uplift – although these figures are of course very encouraging they

must take into account the lost trading days in March 2018 due to the adverse weather.

As we head into the late Spring and early Summer

trading period we would anticipate an increasingly busier city centre

Roddy Smith
Chief Executive

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Edinburgh Footfall Index March-April 2019

March and April have seen a mixed bag when compared to the same months in 2018 in the BID; with March decreasing by 4.4% and April down by 3.4% when compared to 2018.

The non-BID counters did particularly well in March and April with both counters seeing a 5.3% increase.

Edinburgh as a whole was flat in March and saw an increase in April of 5.3%.

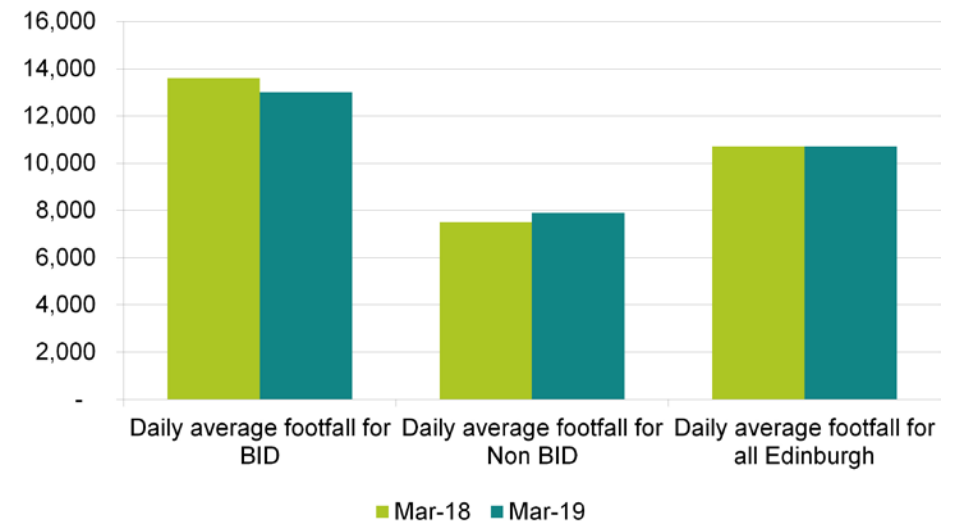
The charts on the following pages look at annual and monthly footfall averages by day of the week, by area and by hourly intervals compared to March and April 2018.

In March total footfall counted in the BID exceeded 6.8M,

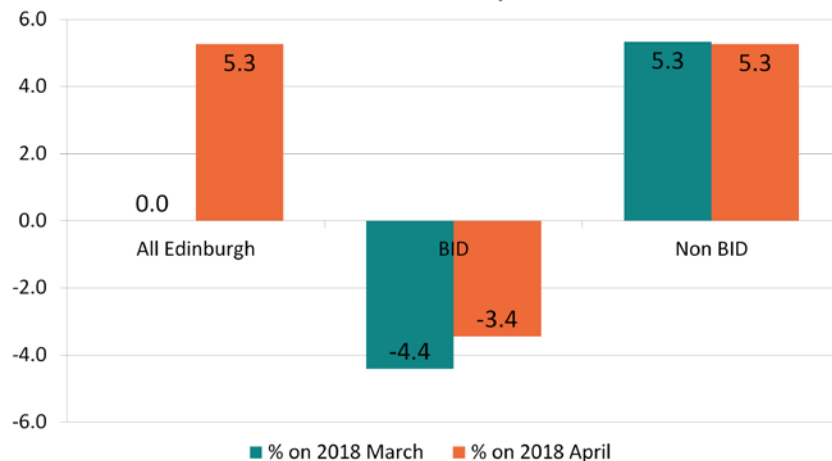
representing 65% of all footfall counted in Edinburgh. In April, the total count was over

£6.3M people, representing 64% of all footfall being counted in Edinburgh.

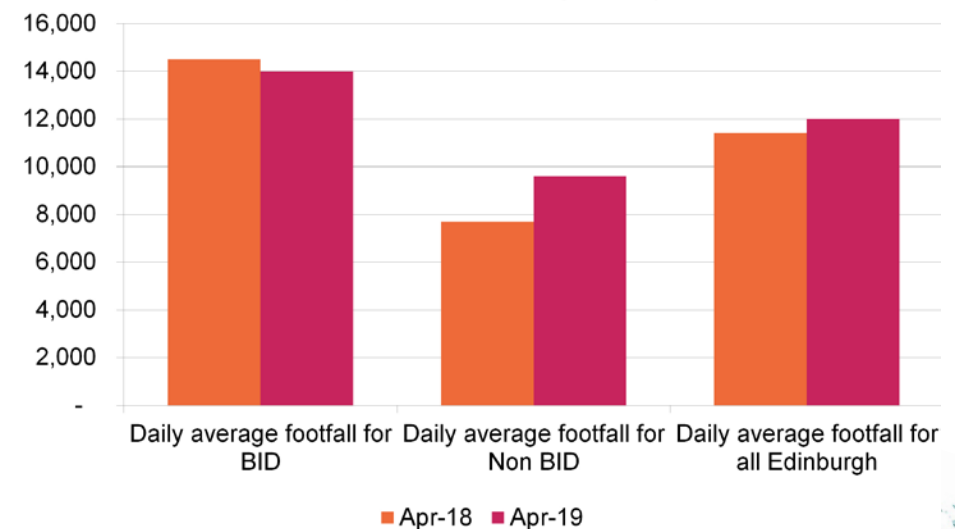
Annual comparison March



Annual Footfall Comparison



Annual Comparison - Average Daily Footfall



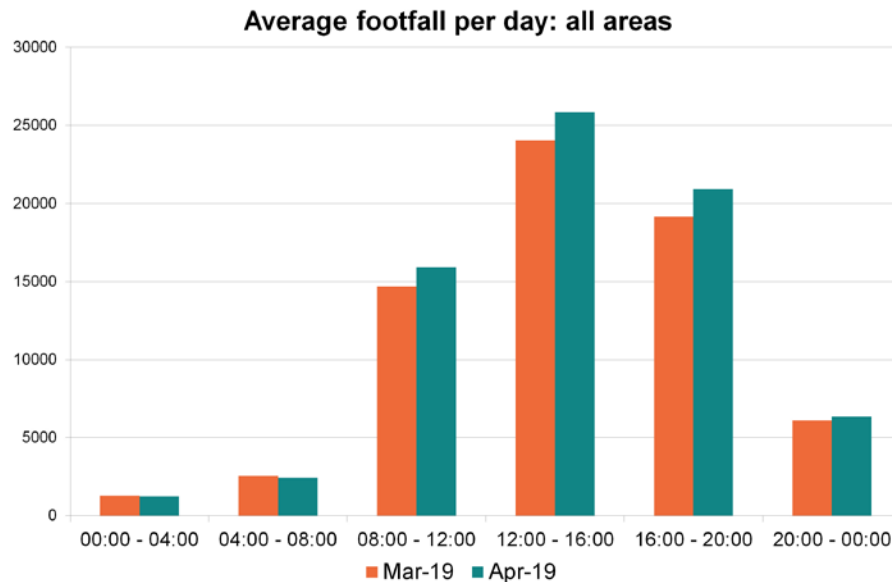
Footfall Daily Averages

The following charts look more closely at the average footfall by area, time of the day and day of the week.

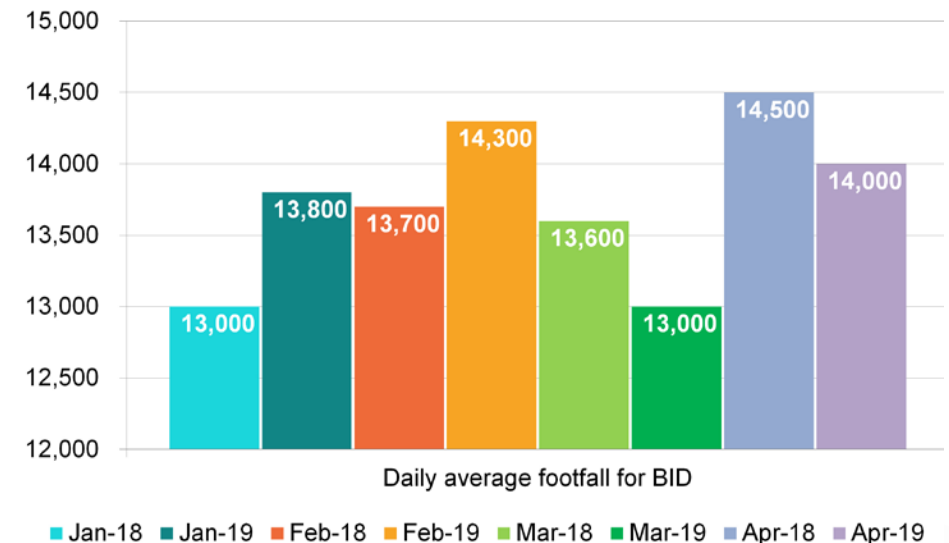
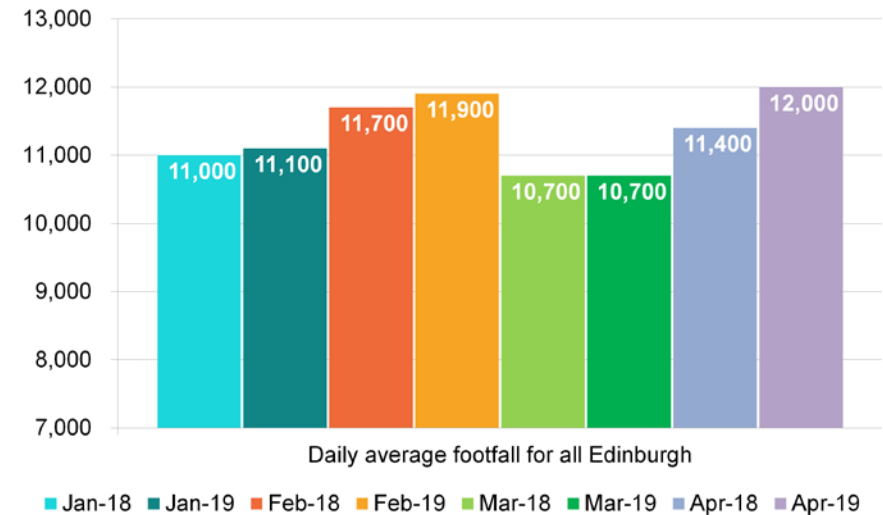
Annually, March's average daily footfall in 2019 decreased within the BID compared to 2018 by 4.4%. In April, annual footfall decreased by 3.4%.

The busiest day of the week, by average footfall in the BID

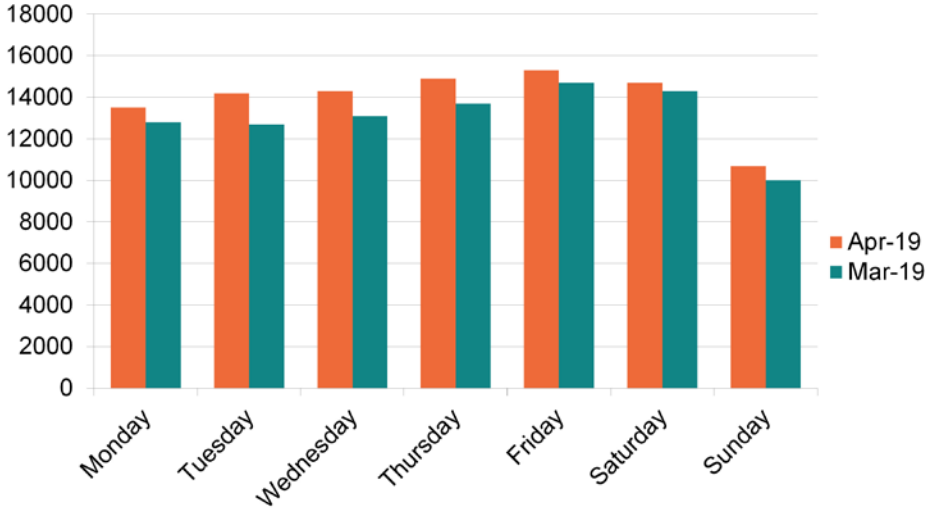
area in March, was Friday with an average daily count of 14,700, closely followed by Saturday with 14,300. In April the busiest day was Friday with an average daily count of 15,300, followed by Saturday with 14,700.



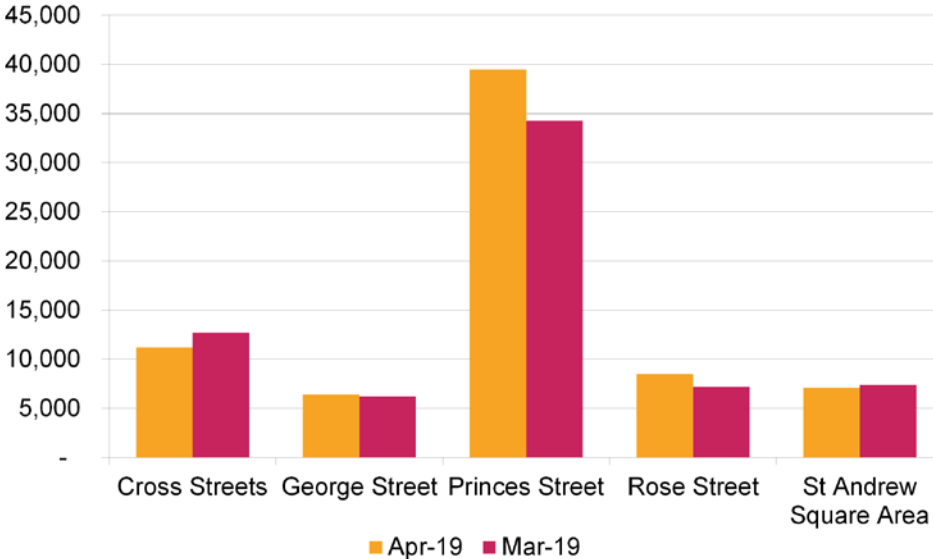
It is important to note that events, small changes to bus routes/stops, traffic diversions, incidents that close roads and the weather all have an impact on footfall.



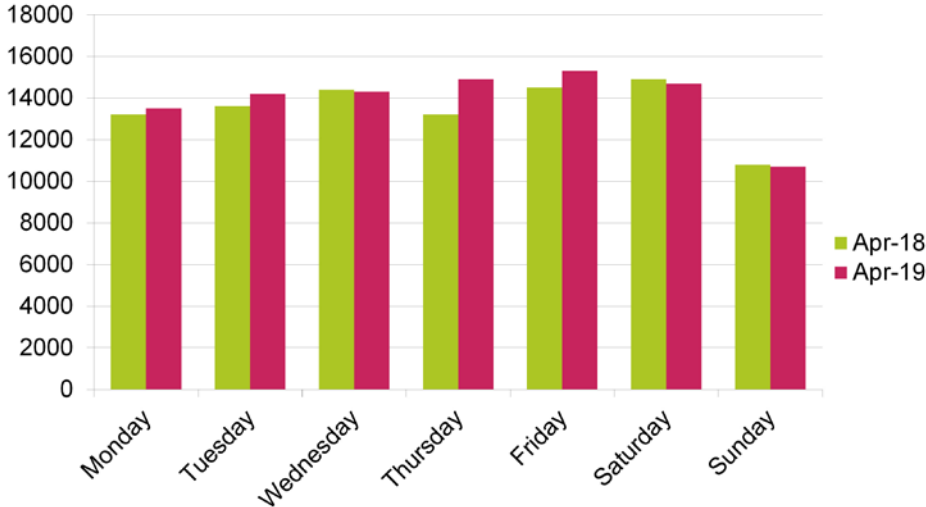
Footfall Daily Averages -
Monthly Comparison



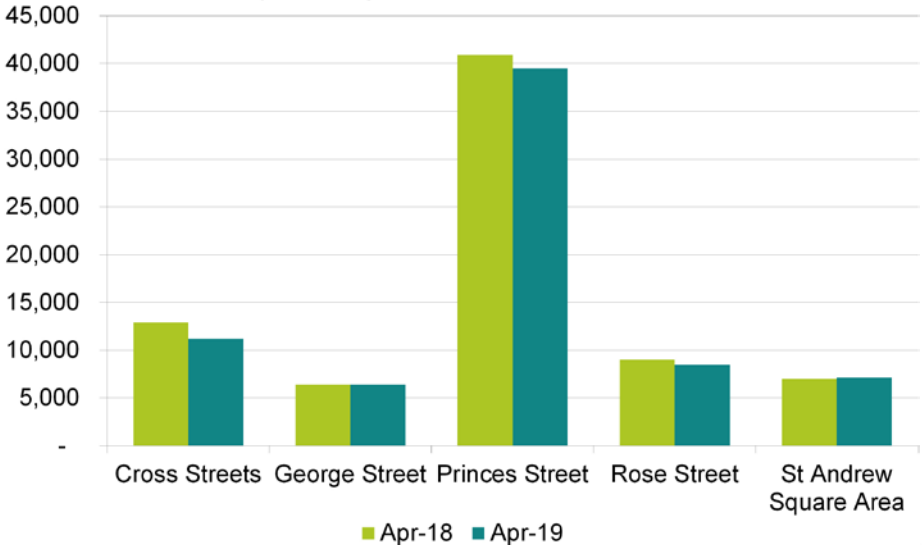
Daily Averages - Monthly Comparison



Footfall Daily Averages -
Annual Comparison



Daily Averages - Annual Comparison



Sales Monitors for March 2019

Sales for Edinburgh city centre retailers during March 2019 increased when compared with sales during March 2018 by 2.7%. In the UK sales dipped when compared to the same time period last year by 0.5%. Within Scotland as a whole, retail sales rose slightly by 0.3%.

Retailers participating in the Retail Monitoring Programme provided these figures for March 2019.

The figures for Edinburgh are based on a sample of city centre retailers. The figures for Scotland and the UK were reported by the BRC-KPMG Retail Sales Monitor and the BRC Scottish Retail Sales

Monitor.

For Edinburgh's hospitality businesses a rise in turnover was reported of 12.6% when sales in March 2019 were compared with March 2018. Businesses reported that this increase was due to the adverse weather during March 2018.

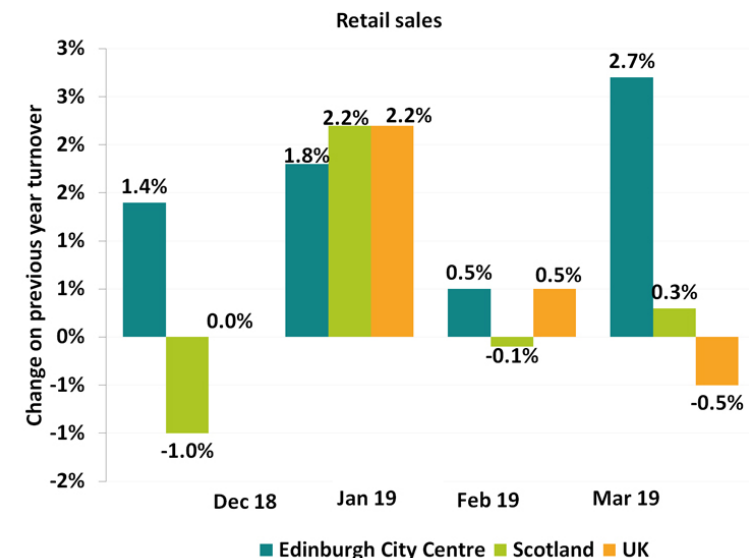
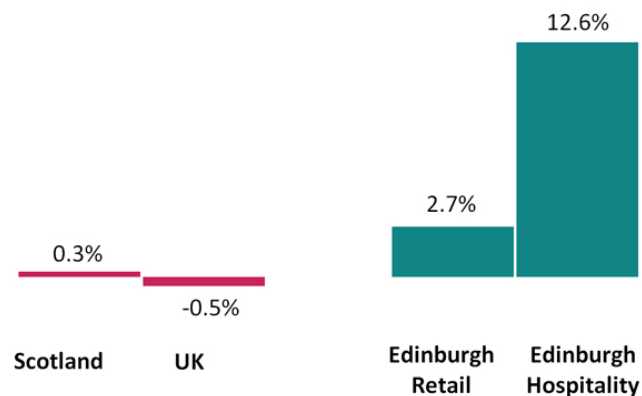
Helen Dickinson OBE, Chief Executive, BRC, commenting on the UK figures said:

"Retail sales slowed in March, even when the Easter distortions were accounted for, as greater uncertainty caused people to hold off from splashing out. While jewellery, beauty products and clothing purchases were all up to indulge on Mother's Day, shoppers were generally

cautious not to overspend, particularly on larger items.

"Brexit continues to feed the uncertainty among consumers. For the sake of everyone, MPs must rally behind a plan of action that avoids no deal – and quickly – or it will be ordinary families who suffer as a result of higher prices and less choice on the shelves."

March 2019 on March 2018



Paul Martin, UK Head of Retail, KPMG, commenting on the Scottish figures said:

“Total sales in Scotland grew by 0.3% in March compared to the same period last year, and while this is below the three and twelve-month averages, it reflects a much brighter picture than the UK as a whole, where total sales fell by 0.5%.

“The month started strongly compared to last year, when shoppers were forced to stay indoors by the Beast from the East, but sales quickly dropped as the weeks passed.

“Nevertheless, March bucked the usual trends. Non-food items performed much better than recent months, increasing by 1.3% when adjusted for online purchases, whereas food sales declined by 0.2% as a result of Easter 2018 distorting last year’s figures.

“March may have provided breathing space for retailers but the path to success is not smooth and businesses will need to remain agile in a changing landscape.”

Edinburgh Visitor Survey - Quarter 1 results

According to respondents to the Edinburgh Visitors Survey, an ongoing survey conducted by STR on behalf of Essential Edinburgh, tourists who expressed a preference said that the BID area managed by Essential Edinburgh outperforms the rest of the city centre with regards to the majority of issues.

The following charts provide information on visitors’ experience of the New Town / BID area compared to other areas in the city. Respondents without a strong opinion were discounted.

The table below shows how much staying Edinburgh

visitors spent on different aspects of their trip. Overall, visitors’ expenditure has decreased by 4.7% compared to the same period last year. The most notable change in Q1 2019 compared to Q1 2018 came from an increase in shopping.

Can you participate in the city centre monitoring programme?

We are looking for more retail and hospitality businesses to participate in this anonymous programme.

For more information about how to join the Turnover Monitoring Project, please contact STR, who manages this project on our behalf: csbanks@str.com or 0131 240 1247.

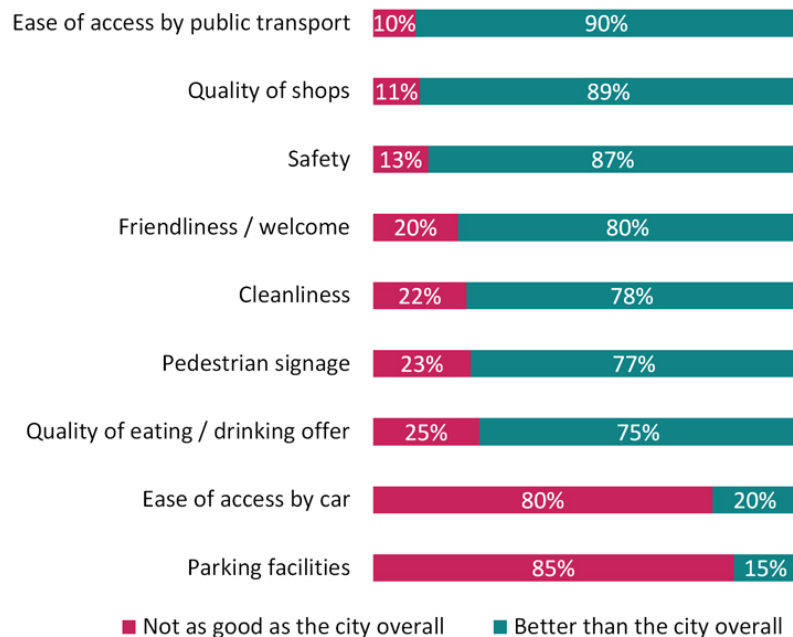
You are sent the sales performance information before publication in Essential Trends if you agree to participate in the City Centre Monitoring Project.

Staying Visitors	Q1 2019	Q1 2018	Q1 2017
Accommodation	£36.63	£42.01	£42.67
Eating / Drinking	£27.04	£28.55	£28.14
Shopping	£16.74	£15.51	£14.97
Entertainment	£10.50	£10.09	£10.16
Travel / Transport	£6.27	£5.75	£5.31
Total	£97.18	£101.91	£101.25

Considers visitors to the New Town only

We have asked visitors to the New Town about their experience of the BID area compared to other areas of the city. As illustrated in the chart below the quality of shops and the quality of the eating and drinking offer were rated higher than other areas of the city. Similarly, visitors found that it was easier to access the New Town BID area using buses

and trains. Additionally, cleanliness, friendliness, signage and safety were rated higher in the BID Area compared to other areas of the city. Respondents also noted, however, that it is easier to access other parts of Edinburgh by car and find a parking bay there than it is in the New Town/BID area.



Parking Index: March 2019

The information below shows the number of times and length of time each parking bay is used during the chargeable period. The higher the turnover of paid parking spaces, the more opportunities for shoppers to find a space.

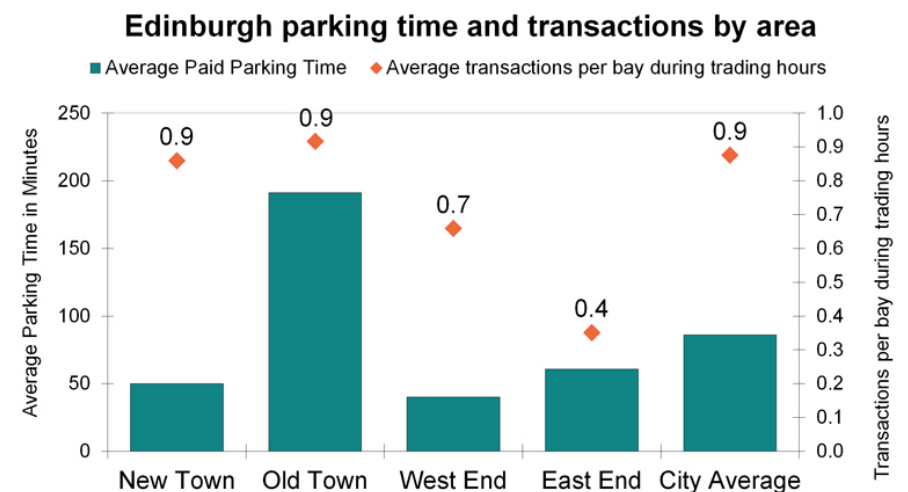
The table below reflects the levels of usage of parking bays during the times when parking charges are levied:

In the New Town there are 959 bays in zones 1A and 2, which covers the Essential Edinburgh BID area.

Monday to Saturday

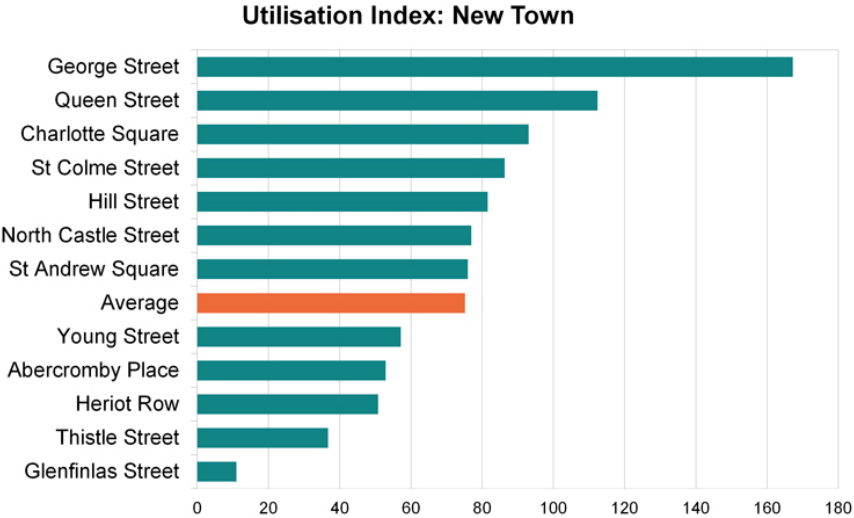
- 8:30am – 5:30pm in areas with lower parking ticket sales
- 8:30am – 6:30pm in areas with higher ticket sales

It should be noted that the average daily number of transactions per bay during trading hours and the average length of time parked are derived from transactions at parking ticket machines,



which vary throughout the year. The relatively low number of daily transactions per bay is likely to be due to the usage of the bays by holders of resident’s parking permits.

The city average turnover of parking spaces per day during March was 0.9. In the New Town the average was 0.9, Old Town average was 0.9, this compares to 0.7 in the West End and 0.4 in the East End.



Parking Utilisation

Shoppers looking to park their car are more likely to find a space in the streets that are less utilised. It is clear that George Street had the highest levels of utilisation, followed by Queen Street.

The streets that are used less than average for parking include; Young Street, Thistle Street, Heriot Row, Abercromby Place and Glenfinlas Street.

Million March Milestone

More than one million people passed through Edinburgh Airport in March 2019, making it the first ever one million passenger March for the terminal.

A total of 1,106,998 people used the airport, up 14.8% on the same month last year, with growth in both the domestic and international markets. The growth is also helped when compared to disruption caused by last year’s Beast from the East.

Gordon Dewar, Chief Executive of Edinburgh Airport said:

“To get our first ever million passenger March is another milestone for us and shows our variety of destination and types of holidays and trips are really providing for our passengers.”

“While these figures are good, we always need to look ahead and consider what is on the horizon and uncertainty caused by Brexit, the expensive aviation tax we face and the impact it has on our airlines. We will continue to work to mitigate and manage those things as best possible and for the benefit of our passengers.”

	Mar 19 vs Mar 18	
Domestic	459,494	18.2% ↑
International	647,504	12.5% ↑
Total	1,106,998	14.8% ↑

www.edinburghairport.com
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Parking statistic source:

