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# ESSENTIAL TRENDS

BID MARKET INTELLIGENCE

ISSUE 1 OCTOBER 2010





## Introduction

**Welcome to the first edition of Essential Trends**, a monthly bulletin monitoring the health and vibrancy of Edinburgh city centre. In this month's issue you will find data on footfall, car park usage and a report from the CACI Insight Spatial Modeller – a comprehensive data solution that allows us to analyse current consumer trends.

*In providing detailed information on the performance of the city, Essential Edinburgh is enabling you to compare your own monthly performance against the performance of the city centre as a whole. Essential Trends will also provide investors, developers, council officers and other interested parties with data on the health of the city centre.*

*The health and vitality of our city centre is of paramount importance and regularly taking the city centre's pulse will help to guide the future prosperity and growth of Edinburgh City Centre.*

**Jane Wood, Chair of Essential Edinburgh.**

## Retail Sales Data

To help build a picture of the health of the BID we need to collate (confidentially) retail sales data. The names of participating businesses will not be published, ensuring that the data is anonymous.

In recognition of their contribution, participating retailers will be given first sight of the monthly data and the opportunity to be quoted in press releases.

If you'd like to help us please contact Lisa Dransfield, Head of Marketing and Communications, on 0131 652 5940 or e-mail [lisad@essentialedinburgh.co.uk](mailto:lisad@essentialedinburgh.co.uk).

## Contents

City Centre News	Page 3
CACI Report	Page 3
Retail	Page 4
Parking	Page 4
Footfall	Page 5



## Retail Sales Turnover

The retail figures for Edinburgh are derived from a monthly survey of a basket of city centre retailers, while figures for Scotland are taken from the Scottish Retail Sales Monitor published by the Scottish Retail Consortium.

Table 1 shows the average annual change in monthly retail sales in Edinburgh and Scotland. Gross retail sales (including VAT) in Edinburgh city centre were on average 8.9% higher in August 2010 than in August 2009.

Month	Edinburgh City Centre	Scotland
August 2010	8.9%	2.4%

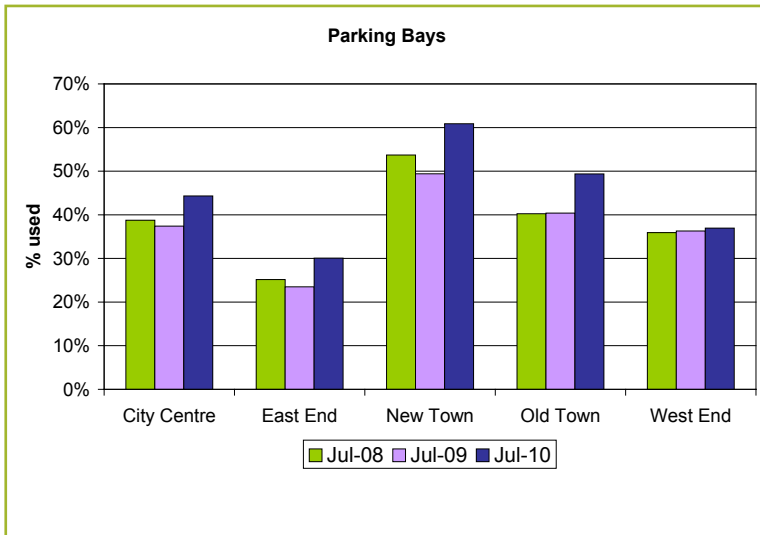
Gross retail sales for Scotland as a whole were 2.4% higher than one year earlier. This data indicates that retailers in Edinburgh city centre are, on average, trading considerably better than one year earlier, with stronger sales growth than Scottish retailers as a whole.

Retail sales data is provided anonymously by city centre retailers. If you are able to provide monthly percentage figures to build up a bigger picture of the health of the city centre please contact us on 0131 652 5940 or email: [lisad@essentialedinburgh.co.uk](mailto:lisad@essentialedinburgh.co.uk)

## Parking

In July 1,796 parking bays were utilised in the city centre. The average utilisation in the city centre was 44.3%, up significantly on both 2009 and 2008.

The busiest area of the city centre was the New Town with, on average, 60.9% of parking bays occupied. The quietest area was the East End, with an average of 30.1% of bays occupied.



The lengths of stay were highest in the East End (1 hour and 40 minutes) and shortest in the West End (1 hour and 16 minutes). The average length of stay in the city centre was 1 hour and 23 minutes and lengths of stay in the city centre rose steadily throughout 2010, with the average visitor to the city centre in July remaining 5 minutes longer than in January.

# Footfall

## Pedestrian footfall is a recognised measure of the health and vitality of urban areas,

with pedestrians providing trade for shops, eateries and visitor attractions and contributing to the vibrant atmosphere of the city centre. Footfall in Edinburgh is monitored using a network of counters strategically positioned around the city centre.

The table below shows the annual change in footfall in Edinburgh City Centre relative to the UK as a whole. Despite lagging behind the UK average for the first five months of the year (particularly in February, when Edinburgh

	UK	Edinburgh
January	-7.5%	-9.1%
February	-5.5%	-14.4%
March	-3.0%	-8.7%
April	0.8%	-7.0%
May	-3.2%	-4.5%
June	0.4%	1.2%
July	-1.9%	-1.0%
August	-3.9%	2.5%

experienced exceptionally heavy snow), footfall in Edinburgh rallied over the summer, outperforming the UK average from June onwards.

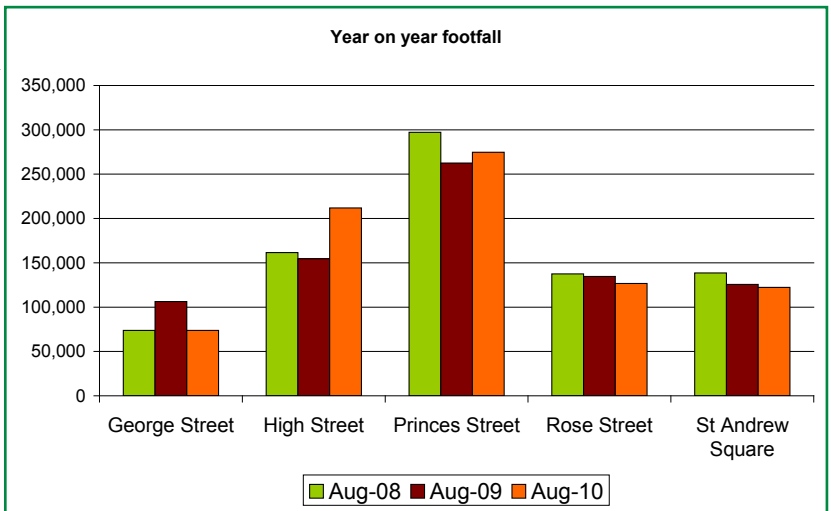
Edinburgh performed particularly strongly in August, recording a 2.5% increase in footfall in a month in which footfall across the UK was 3.9% lower. Footfall in Edinburgh during August was bolstered by the exceptionally strong performance of the city’s summer festivals, with the largest festival, the Fringe, selling a record 1.96 million tickets (up 5.2% on 2009).

The “Year on year footfall” chart shows average weekly footfall in a number of streets in the city centre during August. The busiest area of the city

centre was Princes Street, with 275,000 pedestrians using the street each week in August – 12,500 more than in 2009, but 22,500 fewer than in 2008.

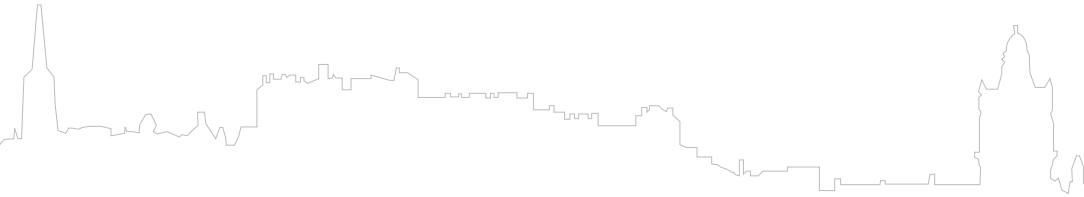
Weekly footfall on George Street averaged 74,000, a return to normal levels following the large surge in footfall recorded in 2009 as a result of traffic diversions from Princes Street. The average weekly footfall on Rose Street was 127,000, down 8,000 on the prior year, while St Andrew Square averaged 122,000, a fall of 3,500.

The largest rise in footfall was recorded in the High Street, which experienced record levels of footfall throughout August. On average, 212,000 pedestrians used the High Street each week, 57,500 more than in 2009. As one of the main venues for open air performers and the location for the Fringe box office, footfall levels on the High Street rose strongly during the festival months.



# ESSENTIAL EDINBURGH.

Central Business Improvement District



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THE CITY OF EDINBURGH COUNCIL