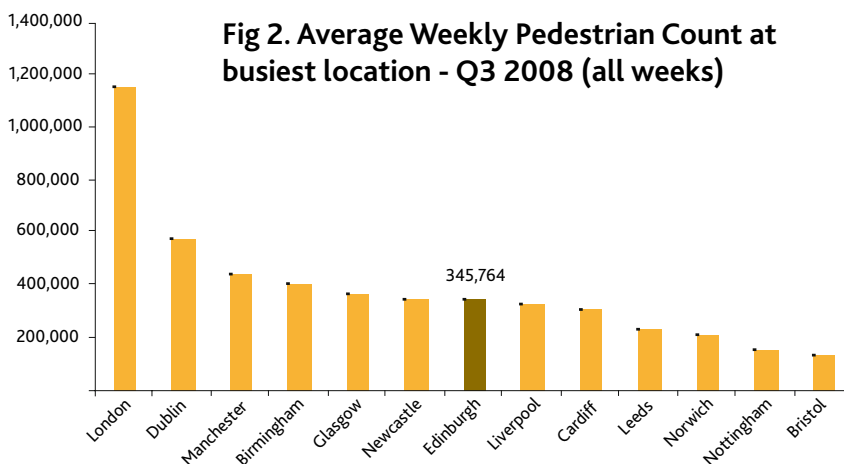
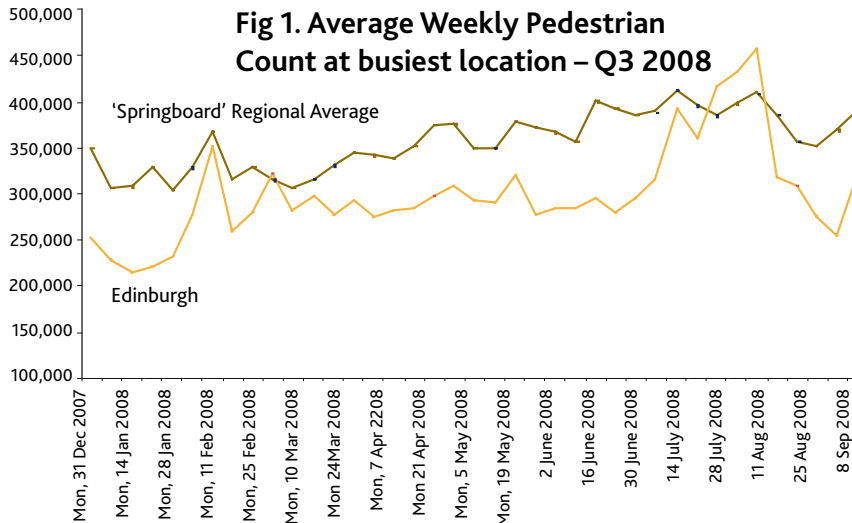


Welcome to the latest issue of the Edinburgh City Centre Performance Bulletin. Produced by the City of Edinburgh Council's Economic Development service, this quarterly bulletin provides a regular snapshot of performance in the centre of the Scottish Capital.

Edinburgh saw a marked improvement in footfall over quarter 3, with total count rising by 17 per cent from quarter 2, compared with the competitor city average increase of just 5.8 per cent. This can largely be explained by the fact that Edinburgh's city centre is popular with tourists over summer months.



For sources and notes on data see page 3.

### Key Footfall Indicators – Q3 2008

Weekly average pedestrian count across the city centre	126,669
Peak daily flow at busiest location (M&S, Princes Street)	90,655
Busiest day this quarter (all locations)	Sat 23 August (542,251)
Edinburgh ranking (out of 13)	7

After a steady second quarter, footfall began to rise with the arrival of summer tourists from early July. This growth continued to very high levels during the course of the Festival. September saw footfall sharply drop back to average levels, but rise again towards the end of the month with the return of students to the city.

Figure 1 shows the extent of the impact of the Festival on footfall, which allowed Edinburgh to overtake the regional average for the first time. This is a significant leap as it usually hovers 16 per cent below the average.

For three weeks of the Fringe between 3 and 25 August, weekly footfall at Edinburgh's busiest counter (Marks & Spencer, Princes Street) averaged 436,298 – 45 per cent higher than its average since it began counting last December. The impact was even more acute in areas closer to Fringe hotspots. Counters on the High Street and South Bridge registered a doubling of footfall during the fringe weeks.

Figure 2 shows that despite Edinburgh's improvement relative to the average, the city remains seventh in the Springboard rankings for quarter 3.

**Figure 3: Average Footfall by Location - Q3 (Two Way Flows)**

Location	Average weekly count	↑/↓ since Q2	Location	Average weekly count	↑/↓ since Q2
Princes St. at Marks & Spencer	345,764	16.7%	High St. at Bella Italia	95,244	17.1%
Princes St. at Carphone Warehouse	249,203	20.7%	Shandwick Place at Specsavers	91,259	18.2%
Princes St. at Next	242,589	14.8%	Shandwick Place at Lothian Buses	78,853	38.5%
Princes St. at Frasers	211,970	22.5%	George St. at the Dome	73,127	19.1%
High Street at Radisson Hotel	139,602	33.9%	Grassmarket at Costume HaHa	70,637	40.5%
St Andrew Sq. at Harvey Nichols	124,342	13.6%	George St. at Whistles	60,869	25.8%
South Bridge at Offbeat Clothing	123,898	29.7%	Lothian Rd. at Pasta Hut	59,210	4.8%
South Bridge at Latest News	114,537	25.4%	George St. at Rohan	53,942	7.9%
Rose Street at Black & Lizars	114,402	13.5%	Lothian Rd. at Black & Lizars	30,602	-21.4%

Princes Street was by far the busiest street in the city centre, with the Marks & Spencer counter registering the highest number of pedestrians. It is also noticeable that the east of the city centre was busier than the west, with areas such as Shandwick Place and Lothian Road seeing lower footfall than South Bridge and the High Street. This is normally the case, but was probably not helped by tram works which affected West end streets more during the quarter.

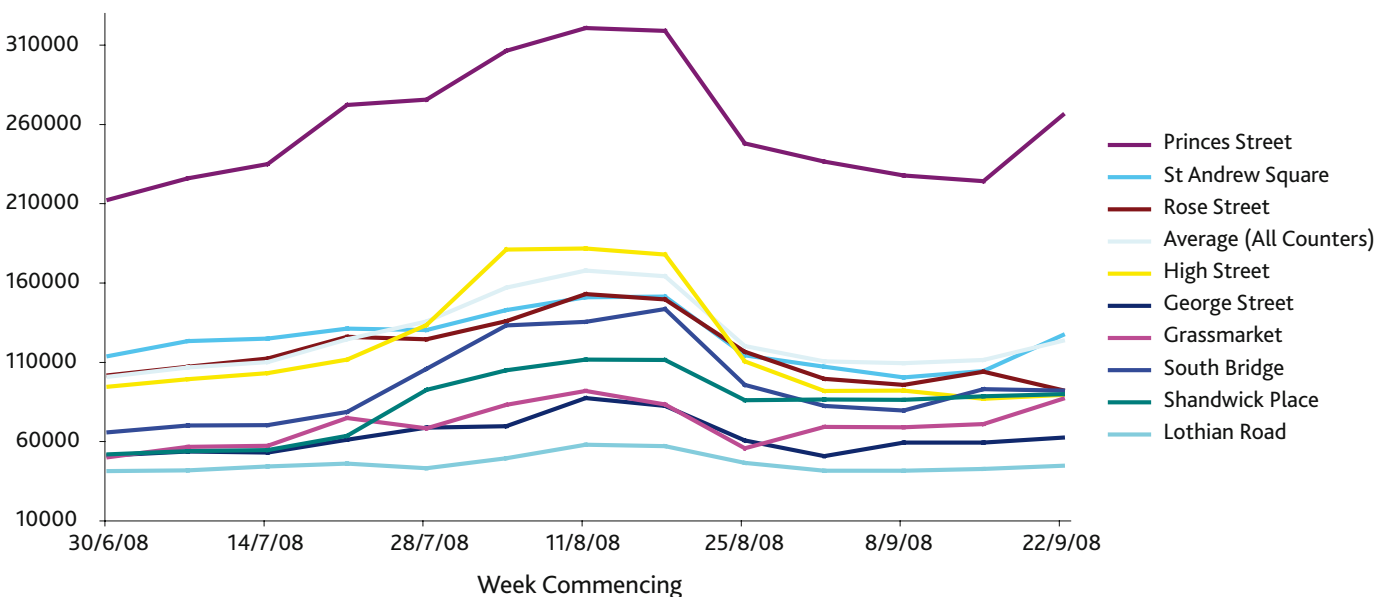
Being a summer period, quarter 3 saw some interesting variations in trends. Areas popular with tourists, such as the High Street and South Bridge saw footfall increase more sharply than areas more known for retail and popular with residents, such as Princes Street and Shandwick Place. This was particularly noticeable during the festival weeks.

The impact of the weather can also be inferred from the figures. Last August was the wettest for

Edinburgh since records began, suggesting that the rise in footfall could have been higher. Despite the Festival, St Andrew Square's footfall fell in August compared with July, suggesting that it is an area to which people flock on dry, sunny days.

Following the summer, the first half of September was a quiet period but figures were boosted towards the end of the month, perhaps partly due to the university terms beginning and the weather improving.

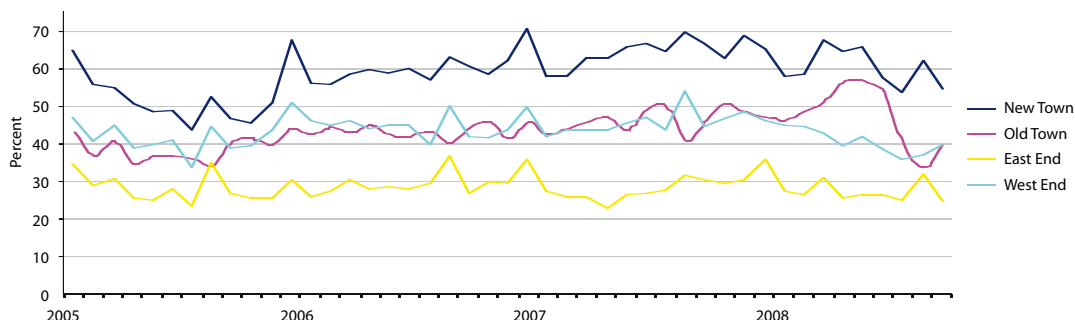
**Fig 4. Q3 Weekly Footfall Trends (Street Averages)**



# Parking

Fig 5 Utilisation of on-street parking in Edinburgh city centre

The latest parking data tells us that the New Town remains the busiest area and the East End the quietest, but this quarter did see some variability in utilisation by area. Historic data confirms that these fluctuations are normal due to routine roadworks and events, but these have been more marked this year probably due to the tramworks. The Old Town is



the only area not affected directly by the construction, explaining its pre-summer rate which was higher than normal. The sharp decline in the Old Town's utilisation rate may be a

combination of the Festival affecting its accessibility and the reopening of Shandwick Place making the West End more appealing to drivers.

every week of the past quarter. Competitor cities average includes average data collected at the single busiest location in a portfolio of competitor cities including London, Dublin, Manchester, Birmingham, Glasgow, Newcastle, Liverpool, Cardiff, Leeds, Norwich, Nottingham and Bristol. Edinburgh data is collected at M&S on Princes Street, Edinburgh's busiest counting location.

figures are an average of the data collected at each counting location.

Fig 5 Parking utilisation is based on data collected from all parking meters located within the city centre area. Utilisation rates are calculated as the ratio of time paid for to total hours where charging applies. Data is based on the entire period during which charging applies and as such does not account for variations in usage at different times of day.

## Note on sources and data

All footfall data are collected via a new network of 18 fully automated pedestrian counters, commissioned by the City of Edinburgh Council and operated by Springboard, an industry leader in the provision of pedestrian counting technology.

**Figs 1 and 2** Each data point represents an average of all weekly averages recorded across all counting locations during

**Fig 4** Where a street has more than one counting location, street

# String of Pearls update

Plans to revitalise Edinburgh's city centre continue apace with the first in a series of Development Briefs for each of the Princes St Blocks or 'Pearls' being agreed by Planning Committee in May 2008. The Brief outlines potential uses for the complex of buildings at New Parliament House (Old Royal High School) on Regent Road – Scotland's finest neoclassical building. A business plan is being developed and options include a facility which would act as a hub for the growing number of visitors coming to the city. Draft Development Briefs for the main Princes Street blocks will be considered

by 4 December Planning Committee followed by an 8 week consultation.

Development appraisals are in progress for Block 1 (Fraser's West End) and discussions are well advanced with an investor for this site.

A series of briefing meetings with Princes Street building owners has resulted in an endorsement of the approach taken to date and a commitment to future joint working to address Princes Street challenges.

Funds continue to invest in plans and a number of proposals are being

brought forward to the market: Henderson Global have lodged an Outline Planning Application for St James Quarter and Derramore are in discussion with the Council regarding plans for 121-123 Princes Street.

The Council is marshalling resources to ensure that it delivers the required changes in transport/movement, waste management, servicing and public realm to make the most of the opportunities which Princes Street, Princes Street Lanes and Rose Street provide.

# City centre round up

**T**he City Centre News Round up is based on various press and other media sources during Q3 2008. The column is intended to provide a snapshot of recent events in Edinburgh city centre and should not be considered a comprehensive list of all relevant events. While every effort has been made to ensure a high degree of accuracy the authors can make no guarantees as to the accuracy of information quoted and interested parties should seek further independent clarification if further details are required.

Edinburgh's market potential amounts to **£920 million**, new figures from CACI reveal. Ranked as the 19th top retail destination in the UK and Ireland, these figures compare with £2,120 million in Glasgow (ranked 4th) and £690 million in Aberdeen (ranked 36th). The CACI Retail Footprint ranks the performance of more than 2,500 retail centres. Edinburgh's ranking marked a five place improvement on 2007.

Proposals for the first **new hotel development in Princes Street** since the completion of the Mount Royal in 1955 were announced in September. The hotel developers, the Belfast-based Deramore Property Group, applied for planning permission after a lengthy period of consultation with heritage organisations. The £40 million development, incorporating 103 bedrooms, a department store and a rooftop garden, will displace two semi-vacant B-listed buildings at 121-123 Princes Street

and overlook West Princes Street Gardens. Drawing inspiration from glass-fronted designs popular in Berlin, Edinburgh-based architects the Hugh Martin Partnership have begun designing the hotel, with construction expected to commence in early 2010. The development marks the first major Princes Street construction project since the launch of the 'String of Peals' scheme.

Approval has been granted for a £200 million development in **Morrison Street**. 'The Haymarket', as the project is named, will encompass a 17-story, 192-bedroom hotel, a 246-bedroom Travelodge and retail and office provision. The construction will take place on the site of a disused goods yard, and will involve linking Morrison Street to Dalry Road via a boulevard to improve connectivity between Haymarket and the financial district. 'The Haymarket' was designed by Richard Murray – who has argued that the regeneration of the Haymarket area could potentially ape that of the fashionable La Défense business district in Paris – and will be constructed by Tiger Developments. In August 2008, Council Leader Jenny Dawe backed the project, claiming that it would help rejuvenate the western city centre.

**Free parking** will be available on 44 streets in the city centre, Old Town, West End and Tollcross throughout November, December and early January, with no charges levied on pay-and-display bays after 5.30pm on weekdays and

1pm on Saturdays. The measure, intended to help retailers adversely affected by trams works and the 'credit crunch' by attracting shoppers to the city centre, will be funded by £70,000 donated from the Open for Business marketing campaign. The announcement was warmly received by both retailer associations and motorist groups.

**Costa Coffee** is to open a sixth outlet in Edinburgh as part of a UK-wide expansion. The deal, brokered by Cushman and Wakefield, will see Costa Coffee occupy two floors on Castle Street. Capable of seating up to 72 customers, the new shop will cater primarily to shoppers and city centre office workers. The opening comes at a time when many coffee firms, including the ubiquitous Starbucks, are closing unprofitable outlets. In April 2008, Costa Coffee's parent company, Whitbread, announced plans to increase its number of coffee shop from 695 to over 2,000 following a 26% rise in pre-tax profits.

The city centre performance bulletin is produced by the City of Edinburgh Council. For further information please contact:  
David Hanna on 0131 529 3161 or david.hanna@edinburgh.gov.uk

The bulletin can also be downloaded from:



Details of events in Edinburgh city centre can be found at:

