June 2011

Further Information

This report has been compiled by the Planning Information Team within the City of Edinburgh Council's City Development Department.

Conatct us:

e-mail
lindsay.robertson3@edinburgh.gov.uk

telephone
0131 469 3932

by post
Planning Information Team, G1 Waverley Court, 4 East Market Street, Edinburgh, EH8 8BG

Findings in brief

Citywide
- Total floorspace increased by 28% over the period to 1.4 million sq m.
- Total number of shop units has fallen by 6% to 6,679.
- Fall in proportion of shops in active retail use from 49% to 39%
- Vacancy rate relatively stable between 10% and 11%.
- Average shop size increased from 148 to 202 sq m. Average size of supermarkets increased by 48% to 3,750 sq m gross.
- 4 largest supermarket operators have 50% of convenience floorspace.
- Greatest growth in units in financial service use-includes financial advisers, moneylenders, pawnbrokers, mortgage and insurance brokers.
- Doubling in number of served food, charity shops, mobile phone shops, medical outlets.
- Loss of more than half the number of butchers, greengrocers, fishmongers, bakers, building societies.
- New uses emerging not previously featured within shop units. Including community services and activities, internet access and mobile phone shops.

Shopping network
City Centre:
- Increase in floorspace (10.7%) and units (4%)
- Units occupied by non-retail services increased by 35%.
- Lowest vacancy rate of all levels of network of 4%.
- Steady fall in the proportion of city's floorspace from 30% to 26%, compared with an increase in proportion of units from 18% to 20%.
- Most balanced distribution of uses of all levels of network.

Town Centres:
- Reduced floorspace (-4%) and units (-10%).
- Overall vacancy rate relatively stable – 11% in 2010. Rates from 6% to 16%.
- Reduced share of city's floorspace (from 29% to 21%).
- Half of units in non-retail use.

Commercial Centres:
- Substantial increase in floorspace (500%) and increase in units (180%).
- Low vacancy rate - 7% at 2010.
- Increased share of city's floorspace - (from 4% to 20%).
- Predominantly retail locations - 68% of units in active retail use.

Local centres:
- Increase in floorspace (7.5%) and fall in number of units (-7.8%).
- Vacancy rates relatively stable - 11% at 2010.
- Shift towards non-retail services. 57% of units in non-retail use at 2010.
- Reduced share of city's floorspace (from 13% to 11%).

Neighbourhood Shop Groups:
- Fall in number of units (-22%) and floorspace (-3.7%).
- Shift towards non-retail services. 58% of units in non-retail use. Loss of shop use entirely in some NSGs
- Convenience continues to be the dominant type of retail.
- Falling vacancy rate-13% at 2010.
- Reduced share of city's floorspace (from 12% to 9%).

CONTENT

Cover Photo: Victoria Street; image provided by Edinburgh Inspiring Capital, www.edinburgh-inspiringcapital.com

GRAPHS

Introduction

1.0 This report provides analysis of shop occupancy and usage in defined shopping centres within Edinburgh over the last 25 years. Retailing is a key use in the city centre and a large number of other centres throughout the city. The analysis will be used to support retail policy development, retail impact assessment and regeneration initiatives in town and local centres.

2.0 Survey coverage

2.1 Time series

The Edinburgh shop survey was first carried out in 1986. This was a comprehensive survey of all shop units in the city, including details of occupiers, usage categories, floor space and other information. It was updated in 1996 and 2004 and the latest update was completed in Autumn 2010. The survey provides a snapshot of shop occupancy within defined centres. It provides detail of the amount, type and location of retail provision throughout the city, and how this has changed over time.

2.2 Geography

The survey particularly focuses on provision in the city centre, town centres, commercial centres, local centres and neighbourhood shop groups. Boundaries for the purpose of the survey do not necessarily match those of the current local plan as they have been retained to provide continuity of the survey through changes in local plans.

2.3 Unit type

The survey covers all commercial 'shop type' premises which were originally built for the sale of goods or services to the general public, including public houses, banks and similar ancillary uses, but not civic or community uses such as libraries, churches, halls and Council offices. It includes units that were originally built for retail use but have been converted to other uses with limited or no public access. Away from traditional shopping streets, the survey also includes more recent formats such as supermarkets, superstores, retail warehouse, and trade showrooms. Membership only cash and carries/trade discount stores are not included.

2.4 A separate survey of supermarkets and retail warehouses is updated on an annual basis. Key findings from this are included in the analysis below.

2.5 Use of Retail Units

The use of shop units has been classified into four broad classes: comparison retail, convenience retail, non-retail and vacant units.

- Comparison retail is the sale of goods which the purchaser will compare on the basis of price, quantity and quality before a purchase is made e.g. clothes, gifts, electrical goods and furniture.
- Convenience retail is broadly defined as food shopping, drinks, tobacco, newspapers, magazines and confectionery purchased regularly for relatively immediate consumption.
- Non-retail units are those which are not used for the sale of retail goods, and include services such as banks, hairdressers, restaurants and pubs.
- Vacant units are unoccupied and include those which are under refurbishment.

  (see Appendix 3 for full classification).

All shop units have been classified using the Retail Inquiry Classification (Appendix 3). Shops selling retail goods have been classified using the retail expenditure classification originally devised by the Unit for Retail Planning Information (URPI). This is narrower than the definition in the Use Classes order which forms the basis for planning policy. The Use Classes Order 1997 defines shops and other services for the purpose of identifying a material change of use requiring planning consent. The use class order definition of shops includes business types which for the purpose of the Shop Occupancy Survey are classified as non-retail uses such as ticket and travel agencies, post offices, hairdressers, funeral directors, display of goods for sale, domestic hire shops, launderettes and dry cleaners.

3.0 Commentary

3.1 There has been considerable change in shop occupancy over the survey period. This is a reflection of the more widespread changes in retailing in the UK.

3.2 A number of leading retailers have fallen into administration. Other retailers have consolidated their business. This has led to rises in vacant foorspace in most UK centres. This is reflected in the latest survey of vacant floorspace in Edinburgh. Despite this increase Edinburgh compares well with the floorspace vacancy rate of other centres.

3.3 Within the UK vacancy rates have begun to fall in primary shopping areas with an increasing gap between these areas and secondary shopping areas. (Colliers Retail Barometer, Winter 2010). In Edinburgh the vacancy rate in the city centre has increased but remains well below the average vacancy rate of Scottish town centres (Scottish Town Centres, October 2010, GVA Grimley)

3.4 There are an increasing number of services in centres. This is reflected in a number of centres in Scotland. Compared with other cities Edinburgh has a high proportion of its floorspace in this use. In common with other cities comparison retailing is the dominant use.

3.5 The food store sector has remained buoyant during the economic downturn. In Edinburgh the floorspace of this sector has been increasing. While the number of units has decreased the number of supermarkets has increased reflecting fewer but larger units. At national level there are an increasing number of multiple owned foodstores within town centres. This increase is apparent in Edinburgh.

3.6 There is a trend of increasing retail concentration with larger centres capturing an increasing share of the market. Edinburgh city centre remains pre-eminent in terms of volume of retail floorspace, however trends from the survey show that its share in relation to other levels of the network has diminished. It has had a reduced share of floorspace at each survey year.

4.0 Summary of key findings city wide

- 6% fall in number of shop units contrasted with 25% increase in floorspace.
- Larger retail units. Number of units in active retail use has fallen by more than a quarter however floorspace in active retail use has increased by 30%.
- More service oriented centres than in 1986. 38% of shop units in active retail use in 2010 compared with 49% in 1986.
- Vacancy rates relatively stable between 10% and 11%.

4.1 At 2010 there were 6,979 shop units in Edinburgh providing 1,407,917 sq m gross of floorspace. 713 units were vacant. The majority of units in retail use were in comparison use 1,873. 818 were in convenience use. Non-retail services accounted for 3,575 of the city's shop units. 102,333 sq m gross floorspace was vacant. The majority of floorspace was in use for comparison retail - 606,240 sq m gross and 271,340 sq m gross was in convenience use. Non-retail accounted for 428,004 sq m gross (Graph 1).

4.2 There has been a degree of change over the survey period in terms of both floorspace and units (Graph 2). While total floorspace of shop units has increased by 28.5% the total number of shop units has fallen by 6%. The number of units in active retail use (comparison/convenience) has also fallen but by a more substantial 26% as shop units are increasingly in use for non-retail services (Graph 3). In contrast to the fall in number of units the amount of floorspace in retail use has risen, indicating fewer, but larger retail units. 980,000 sq.m of active retail floorspace existed in 2010. This was an increase of 30% since 1986.

4.3 The use of floorspace for retail can be broadly split into comparison and convenience. Convenience goods are generally food and items purchased for immediate consumption, other goods fall into the comparison category. The actual amount of comparison floorspace in the city has increased by around a quarter since 1986. The number of comparison units fell by 15%. The amount of convenience floorspace has increased by 45% from 187,100 sq m gross in 1986 to 271,340 sq m gross in 2010. In contrast the number of convenience units fell 43 % from 1,439 to 818.

4.4 The balance of use of units in the city (Graph 4) indicates more service oriented centres than in 1986. Only 38% of shops were in active retail use at 2010 compared with 49% in 1986. The proportion of units in convenience and comparison use fell overall as non-retail services took up more of the city's shop units. Since the start of the survey period this has been the case and at 2010 the proportion of the city's units and floorspace in comparison use were at their lowest levels of 27% and 43% respectively. Although convenience retaling now accounts for a declining proportion of shop units, its share of floor space has grown from 17% in 1986 to 19% in 2010 again reflecting the increased number and size of supermarkets.

4.5 The increasing proportion of consumer spending devoted to services such as travel, leisure, eating out, health, fitness and personal care has been mirrored by the growing number of shops devoted to such non-retail uses. This has resulted in a significant shift in the composition of many of Edinburgh's traditional shopping centres. Non-retail floorspace has increased by 25% and the number of units by 20% over the last 25 years. Non-retail use accounted for half of the city's shop units in 2010, this increased from 40% in 1986. The proportion of total floorspace in non-retail use was however relatively unchanged over the period at around 30%. The change in floorspace is therefore more a reflection of the overall increase in floorspace and units than the change in balance of total floorspace in the city.

4.6 The citywide vacancy rate has remained relatively stable between 10% and 11% (Graph 5). At 2010 the vacancy rate was 10%. The proportion of vacant floorspace varied only very slightly in the period. At 2010 it was 7%.

4.7 Average floorspace of shop units increased over the survey period from 148 sq m to 202 sq m gross (Graph 6). Convenience units experienced the greatest increase over the period, average size of units increased by 155% to 332 sq.m gross in 2010. The growth of supermarkets was largely responsible for this increase. Average size of comparison stores rose, although not on the same scale as convenience stores. Comparison units increased by 47% to 324sq.m gross. The last 25 years has seen a substantial growth in Edinburgh's new commercial centres. Largely made up of comparison floorspace these formats tend to have larger units which may have contributed to the increase in average comparison unit size. Small units may also have been lost from comparison use in the smaller centres causing the average size to increase. There was an increase of 41% in the size of units in non-retail use and a 4% increase in vacant unit average size.

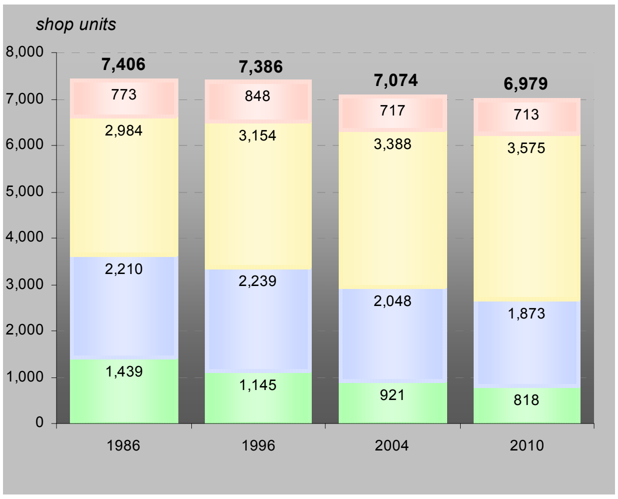
Graphs - Summary of key findings city wide
(see also Appendix 4 Tables 1-12)

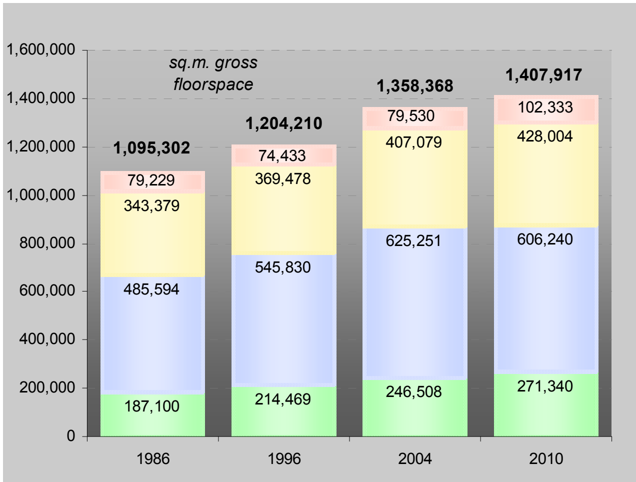
Total shop units 2010

Graph 1a) Trends in number of shop units by broad usage category 1986-2010

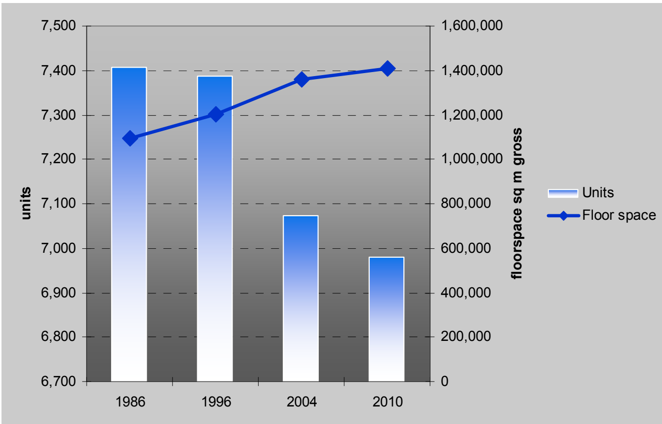
Graph 1b)Trends in floorspace by broad usage category 1986-2010

convenience goods shops   comparison goods shops   non-retail services   vacant shops

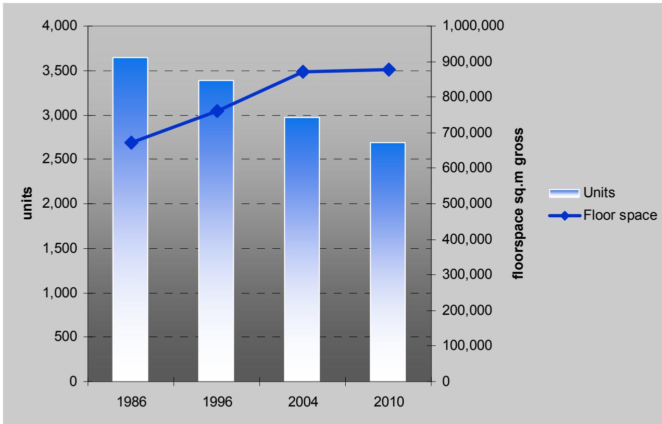




Graph 2 - Floorspace and units 1986-2010



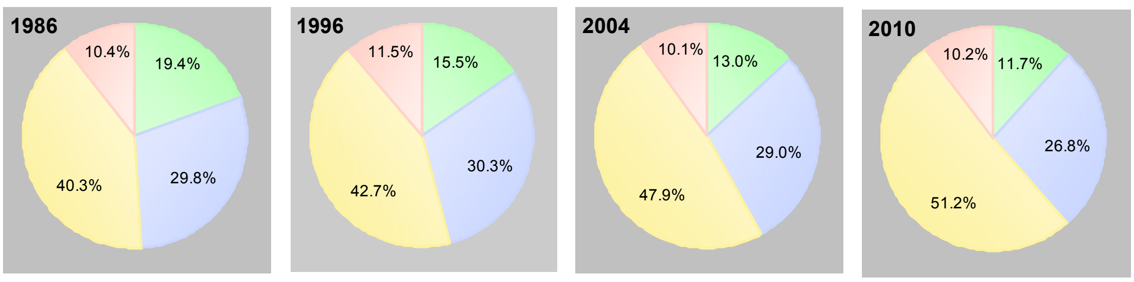
Graph 3 - Units and floorspace in active retail use



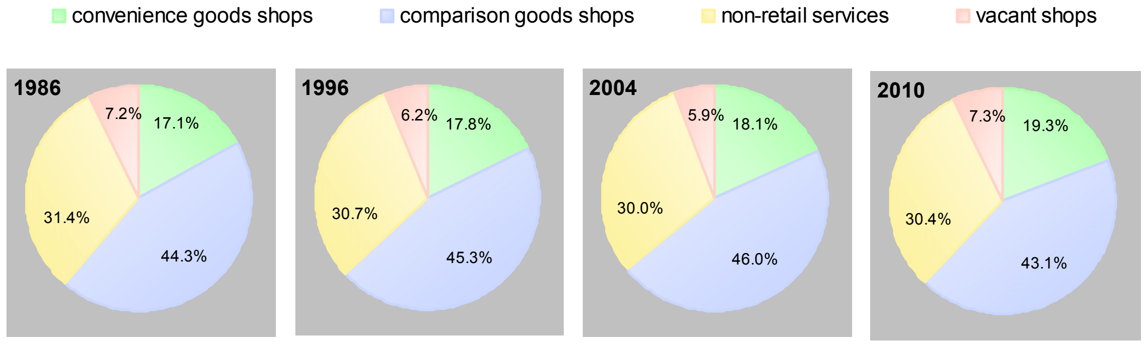
Composition of shop units

Graph 4a) Trends in composition of shop units by broad usage categories 1986-2010

convenience goods shops   comparison goods shops   non-retail services   vacant shops

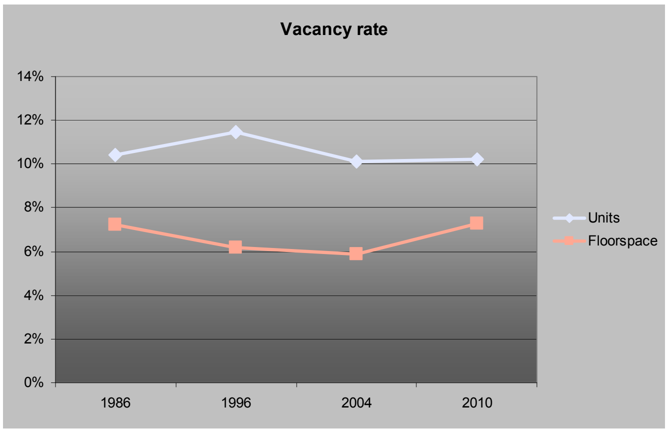


Graph 4b) Trends in composition of floorspace by broad usage categories 1986-2010



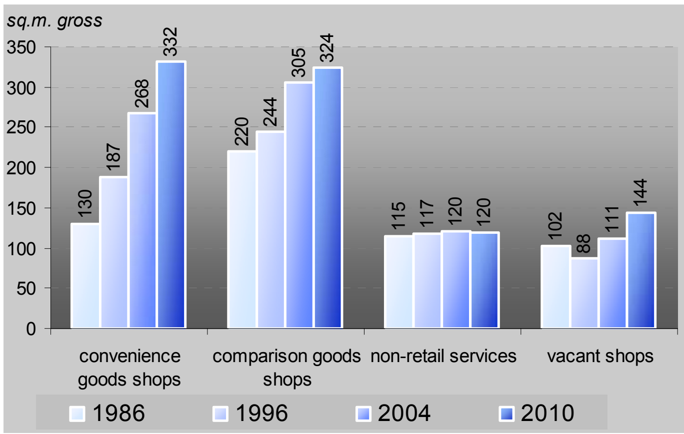
Vacancy rates

Graph 5 - Vacancy rates



Average shop size by broad usage category

Graph 6 - Trends in average shop size (sq m gross) 1986-2010 , by broad usage categories



5.0 Retail network summary: distribution of shop units and floorspace

- Fall in proportion of floorspace in city centre from 30% in 1986 to 26% in 2010. Increase in proportion of units in city centre.
- Largest share of floorspace remains in city centre.
- Growth of commercial centres. In 2010 they made up 5% of the city's units but a fifth of the city's floorspace.
- Largest proportion of Edinburgh's convenience floorspace and units located in town centres -31%.

5.1 Edinburgh is served by a network of shopping centres comprising a number of distinct functional groupings. Analysis of shop units and floor space across the network gives an indication of the trends affecting the various types of centres. While the centres vary considerably within the network, at each level, they share general characteristics and functions. The network consists of:

Edinburgh City Centre
The city centre includes the city centre core, West End, High Street/Bridges, Old Town and New Town.

Town Centres
Town centres consist mainly of traditional units under tenemental flats fronting busy main roads. They tend to be set within high density residential areas. The town centres are: Corstorphine, Gorgie/Dalry, Leith Central, Leith Walk, Morningside/Bruntsfield, Nicolson St./Clerk St, Portobello, Stockbridge and Tollcross.

Commercial Centre
Commercial centres in Edinburgh are the four major free-standing shopping malls –Ocean Terminal, the Gyle, Cameron Toll and Wester Hailes and the four other retail destinations-Newcraighall/The Jewel, Craigleith, Hermiston Gait and Meadowbank. These centres are a more recent phenomenon than the traditional town centres.

Local Centres
Local centres in Edinburgh vary in size. The survey identifies 28 local centres. This is more than designated in the Edinburgh City Local Plan. Some centres are anchored by supermarkets and provide a range of shopping, others provide only a basic level of convenience shopping. Centres range in size from 1 unit to 69 units. The average is 43 units and the median is 29.

Neighbourhood Shop Groups
Neighbourhood shop groups are small groupings of shops which generally serve a small area. 146 neighbourhood shop groups were surveyed. Groups vary in size from 1-37 units with floorspace of 13 sq m - 3,852 sq m gross.

Isolated Shops
Shops which are not part of any defined centre.

Appendix 2 identifies the location of the centres.

5.2 There is variation in the distribution of floorspace and units within the network (Graph 7). The city centre has the largest share of floorspace with just over a quarter of the city's floorspace. Other town centres combined contain the largest proportion of the city's total shop units-32%. 20% of the city's shop units are located in the city centre. Commercial centres account for 5% of the city's units but a fifth of the city's floorspace. 8% of units are isolated shops not part of any centre.

5.3 The distribution of units and floorspace has changed over the survey period. The distribution of shop units has shifted away from local centres and to a smaller degree town centres towards commercial centres and the city centre. The city centre has increased its share of shop units slightly. The share which town centres have of units has fallen a little as commercial centres have increased their share to 5% from 2% in 1986. The proportion of units located in neighbourhood shop groups and local centres have decreased.

Harvey Nichols, city centre

5.4 There has been a steady fall in the proportion of floorspace in the city centre compared with an increase in the proportion of units in the city centre. Change in floorspace distribution since 1986 is most marked by the increase in commercial centres share of floorspace from 4% of the city's floorspace to 20%. As commercial centres have grown in number and size the proportion of floorspace located at all other levels of the hierarchy has fallen with the exception of isolated shops (which includes some supermarkets). Although the city centre continues to have the largest share of Edinburgh's floorspace, its share has fallen steadily since 1986 as commercial centres have grown. The city centre had 26% of the city's floorspace in 2010 compared with 30% in 1986. The distribution of floorspace is therefore moving away from the city centre towards commercial centres.

5.5 Commercial centres tend to have fewer but larger sized units than town centres therefore their growth has not had such an impact on the distribution of units across the hierarchy.

5.6 The distribution of active retail floorspace is different to that of total floorspace. Active retail floorspace is the amount of floorspace in use for retail purposes. It excludes services such as hairdressers, banks and restaurants (See appendix 3 for full classification). Commercial centres have a higher proportion of the city's retail floorspace (27%) than total floorspace (20%) as they have few non-retail services included within them (Graph 8). The city centre in contrast has a similar proportion of the city's total floorspace and retail floorspace reflecting the broader range of uses in city centre units.

5.7 The greatest proportion of active retail units is located in town centres-33%. Commercial centres accounted for the greatest proportion of the city's active retail floorspace, however only 10% of active retail units were in the commercial centres reflecting the larger size of these units. Over the survey period there was a greater degree of change in the distribution of retail floorspace than units between the network. As the proportion of retail units in the city centre increased the proportion of floorspace fell. This is again a reflection of the growth in retail at commercial centres. The proportion of shop floorspace in retail use within the city centre fell from 35% to 27% in 2010. As this proportion has fallen the proportion of the citywide retail units in commercial centres increased by 6% to 29%.

5.8 Within the network town centres contained the largest proportion (31%) of the city's convenience units and floorspace (Graph 9). Neighbourhood shop groups and local centres accounted for a large proportion of units; 25% and 20% respectively. Only 3% of convenience units yet 21% of convenience floorspace was located in commercial centres reflecting the larger size of convenience outlets which are typical of these types of centres.

5.9 The city centre had the largest share of comparison floorspace -37%, followed by commercial centres - 33% (Graph 10). The proportion of comparison floorspace in the city centre has inevitably fallen as the commercial centres have expanded. At 1986, 45% of comparison floorspace was within the city centre. Town centres had only 15% of the city's comparison floorspace yet they had the largest share of comparison units 34%, followed by the city centre 30%. This reflects the nature of town centres which will have smaller units than the city centre. In contrast the commercial centres had 12% of units and 33% of comparison floorspace.

Morningside, town centre

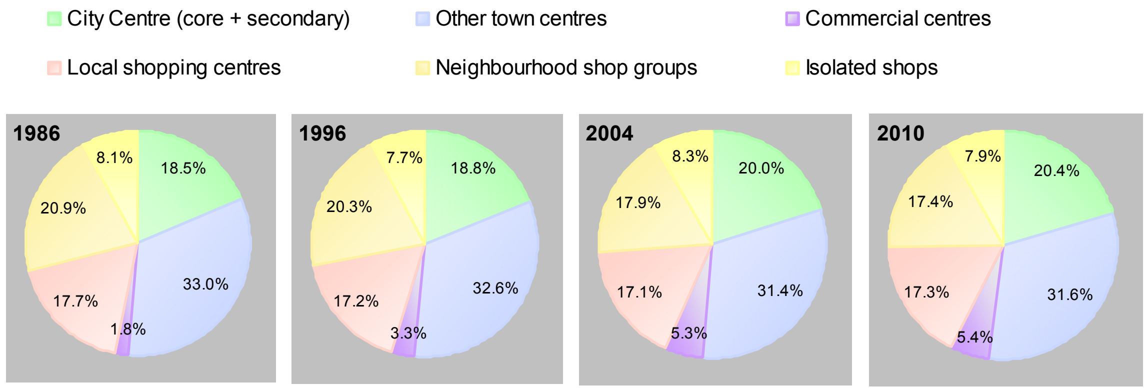
5.10 The highest proportions of non-retail service floorspace were located in the town centres - 28% and the city centre 25% (Graph 11). These centres tend to be the most varied in terms of use. There was little change in the distribution of non-retail services in the survey period. Non-retail services do not feature to a great extent in the commercial centres which have had the biggest impact on the change in distribution of retail units and floorspace.

5.11 The largest share of vacant units and floorspace was within town centres (Graph 12). The proportions were similar to the proportion of total units and floorspace within these centres. The city centre had a much lower proportion of the city's vacant units and floorspace than total floorspace and units reflecting lower vacancy rates within the city centre.

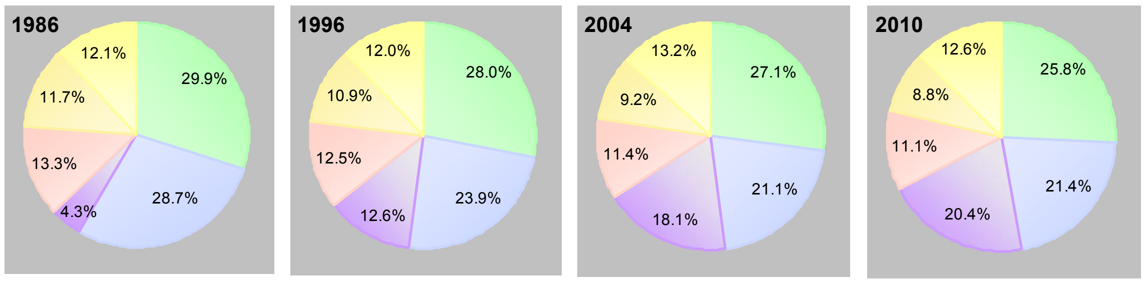
Graphs - Retail network summary: distribution of shop units and floorspace
(see also Appendix 4, Tables 1-12)

All shop units

Graph 7a) Location of shop units by position in network 1986-2010

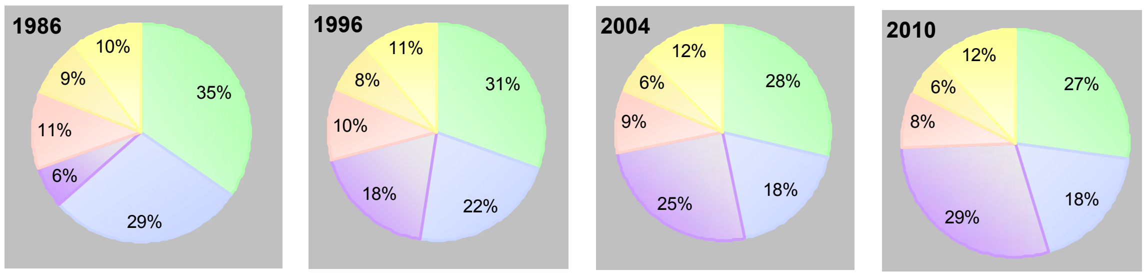


Graph 7b) Location of floorspace by position in network 1986-2010

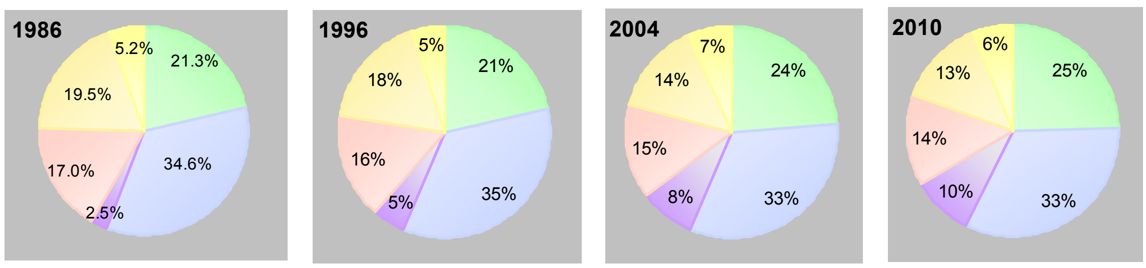


Units in retail use

Graph 8a) Location of shop floorspace in retail use by position in network 1986-2010

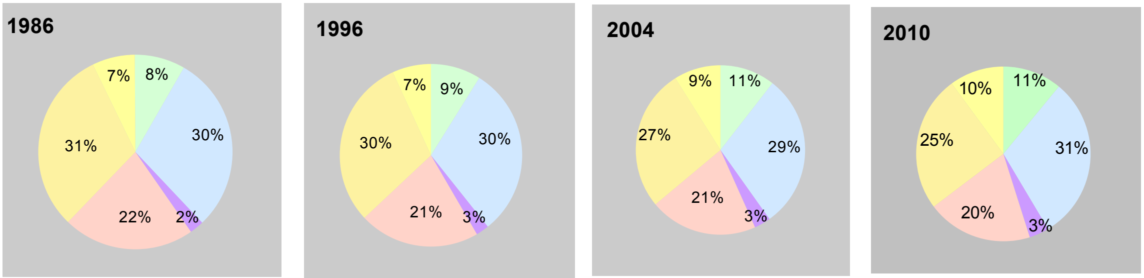


Graph 8b) Location of units in retail use by position in network 1986-2010

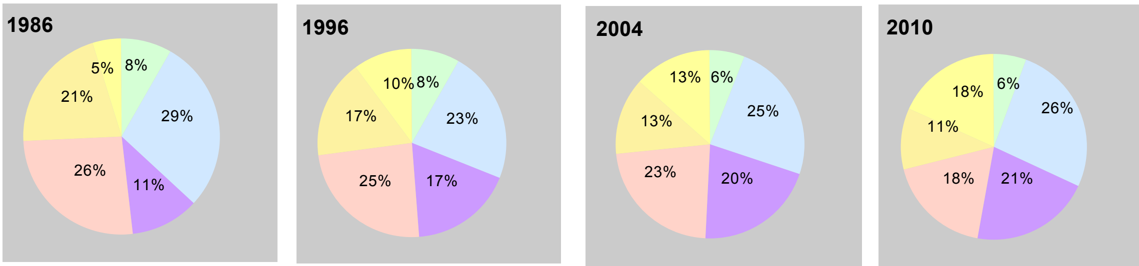


Convenience units

Graph 9a) Location of convenience units 1986-2010

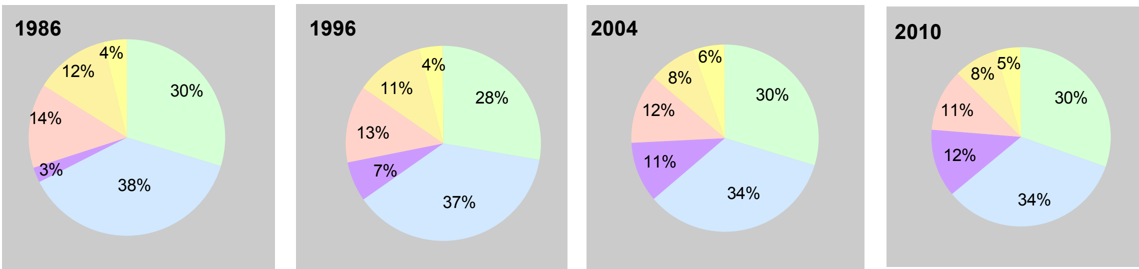


Graph 9b) Location of convenience floorspace 1986-2010

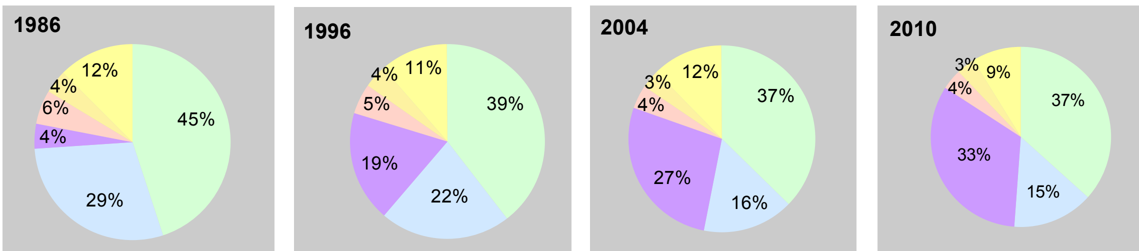


Comparison units

Graph 10a) Location of comparison units 1986-2010

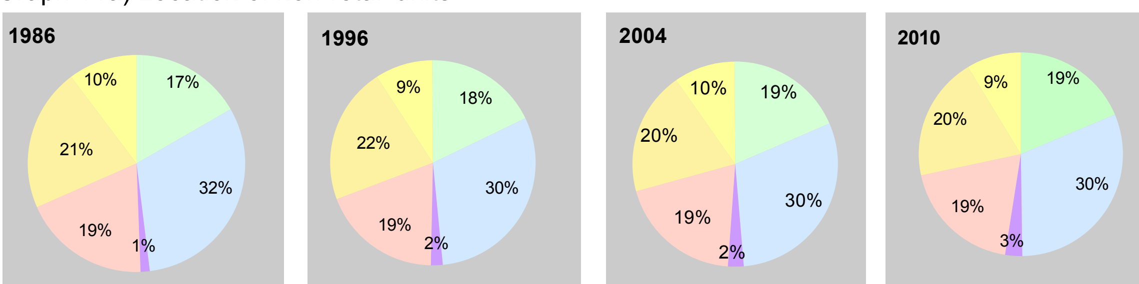


Graph 10b) Location of comparison floor space 1986-2010

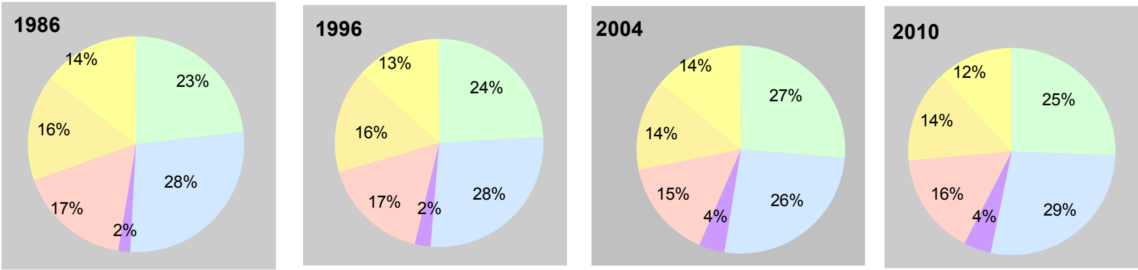


Non-retail units

Graph 11a) Location of non-retail units

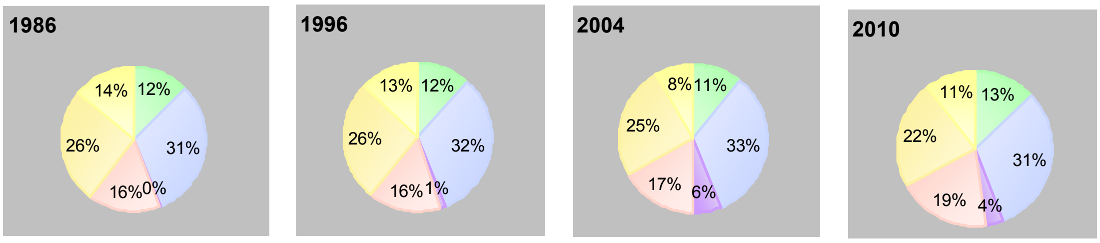


Graph 11b) Location of non-retail floorspace

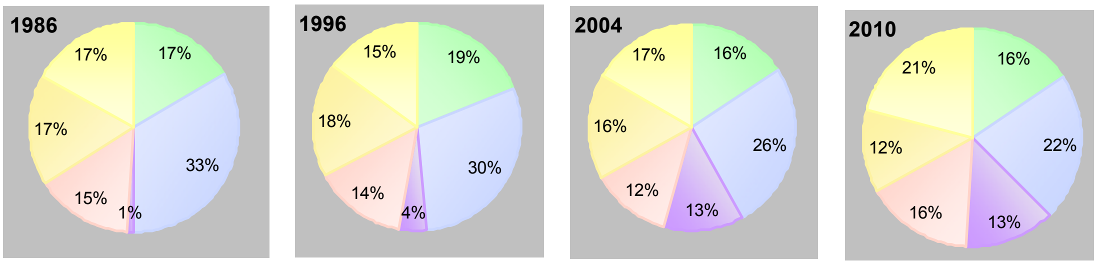


Vacant units

Graph 12a) Distribution of vacant units by position in network 1986 -2010



Graph 12b) Distribution of vacant floorspace by position in network 1986-2010



6.0 Retail network summary: composition of shop units and floorspace

- Different centres within the retail network have a markedly different mix of shop uses and functions. This mix has also changed differentially over time.
- Loss of units in town centres (-10%), local centres (-8%), neighbourhood shop groups (-26%) and isolated shops (-4%)
- Commercial centres most retail focussed – 90% of floorspace in retail use
- Fewer convenience units across the network. Local shopping centres and neighbourhood shops groups reduced by half between 1986 and 2010.
- Largest increases in convenience floorspace in commercial centres (173%) and isolated shops (465%).
- Average size of shop units increased-largest increase in commercial centres.

6.1 There was an increase in the number of units in the city centre and commercial centres between 1986 and 2010. The city centre increased unit numbers by 4%. The increase in commercial centre units was substantial - increasing by 180%. Within the remainder of the network there was a decrease in the number of units in this time. Neighbourhood shop groups experienced the greatest decline as they lost more than a quarter of total units. Town centre units fell by 10%, local centres by 8% and isolated shops by 4% (Graph 13).

6.2 Floorspace in town centres and neighbourhood shop groups declined (Graph 13). Within the remainder of the network there were increases in floorspace. Town centres therefore had fewer units and less floorspace than in 1986, although floorspace has increased since the 1996 survey. City centre floorspace on the other hand increased overall in the period 1986 to 2010, but fell slightly between 2004 and 2010. This fall in floorspace is a temporary occurrence due to redevelopment within Princes Street. Within commercial centres there was a substantial increase in floorspace to accompany the increase in units. Isolated shops also increased their floorspace, while neighbourhood shop groups lost floorspace.

6.3 The network varies in its composition (Graphs 14 & 15). Neighbourhood shop groups, town centres, and local centres are biased towards non-retail services. The city centre has the most balanced distribution of uses. Commercial centres had the highest proportion of their shop floorspace (90%) and units (67%) in active retail use. 46% of city centre units were in active retail use at 2010. Neighbourhood shop groups were the least retail orientated of the network with only 29% of units and 40% of floorspace in retail use. In terms of units the proportion in retail use varied from 29% in neighbourhood shop groups to 67% in commercial centres. This confirms that commercial centres are the most retail focussed of all types of centre. Units in non-retail use tend to be small in size.

6.4 Both the proportion of floorspace and units in retail use fell each survey year for the city centre, town centres and neighbourhood shop groups. The greatest change was in neighbourhood shop groups where the proportion of active retail units fell from 46% to 29%. The change in proportion of floorspace was not as great as change in units. The greatest change in proportion of floorspace occurred within town centres where floorspace in retail use fell from 61% in 1986 to 53% in 2010. Commercial centres experienced an overall increase in proportion of retail floorspace (from 87% to 89%) and units (from 67% to 68%).

6.5 At 2010 isolated shops had the highest proportion of vacant shop units and floorspace. The city centre had the lowest vacancy rates for both floorspace and units of 4 %.

6.6 At 2010 the proportion of non-retail units varied between 47% and 58% with the exception of the commercial centres which had only 25% of units in non-retail use. Likewise in terms of floorspace commercial centres present quite a different picture to the other types of centre. They had only 6% of floorspace in non-retail use compared with a range of 29% to 50% for other centres.

6.7 The number of convenience units fell across the shopping network (Graph 16). The level of decrease was quite significant in many cases. Neighbourhood shop groups had 53% fewer convenience units than in 1986, local shopping centres 48% and town centres 43%. The actual amount of convenience floorspace on the other hand increased across the network with the exception of neighbourhood shop groups which lost convenience floorspace. These contrasting trends once again underline the increasing concentration of convenience goods retailing into fewer, larger units, in particular dominated by the major supermarket chains.

6.8 The proportion of floorspace which was in convenience use in 2010 varied from 17% in neighbourhood shop groups to 6% in the city centre. Isolated shops have become more convenience focussed in terms of floorspace over the survey period reflecting the number of supermarkets which have been developed. Across the network there were falls in the proportion of units in convenience use in the survey period. There was a greater variance within the network in terms of proportion of convenience floorspace than units. The proportions varied from 4% in the city centre to 31% in neighbourhood shop groups.

6.9 The number of comparison units reduced across the network except within commercial centres. The city centre and commercial centres experienced an increase in the amount of comparison floorspace. Commercial centres had the highest proportion of floorspace in comparison use (70%). Local shopping centres (14%) and neighbourhood shopping groups (16%) had low proportions of their floorspace in comparison use, reflecting the number of non-retail services within these centres. The city centre, town centres, local shopping centres and isolated shops had reduced proportions of comparison floorspace over the survey period. Across the network there were greater falls in the number of units in convenience use than those used for comparison goods.

6.10 Average shop size varied considerably across the retail network (Graph 17). Commercial centres contained much larger average size units than any other level in the network. This reflects their relative recent construction, geared towards the needs of larger multiple retailers. The average size of a commercial centre unit at 2010 was 760 sq m gross compared with 254 sq m gross in the city centre and 137 sq m gross in town centres. However it should be noted that the city centre including a small number of very large units, often over multiple floors, which are occupied by department stores.

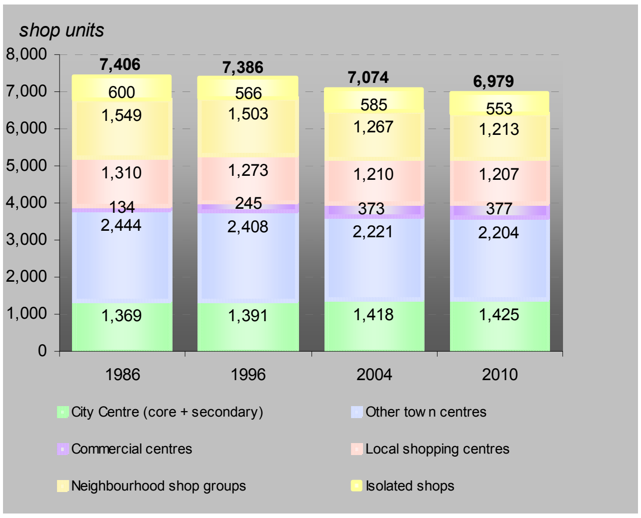
6.11 There was a general upward trend in the average size of units across the network. This has partly arisen from construction of new units to suit modern retail requirements and partly from smaller and less suitable units being converted to other uses such as housing. The largest increase was in commercial centres where the average floorspace of individual units increased from 350 sq.m. to 760 sq.m (118%). The increases within other types of centres were much more modest. The city centre and town centres average unit size increased by 6%. In the city centre although there has been an overall increase in the survey period there has been a slight fall in the average size unit since 2004.

6.12 It is to be expected that the different types of centres within the network are composed differently. The centres perform different roles that are reflected in their mix of uses. The survey reveals that the balance of uses within the centres has been changing. In terms of overall composition, town centres are the most changed over the survey period. They have experienced the greatest increase in the proportion of their floorspace in non-retail use.

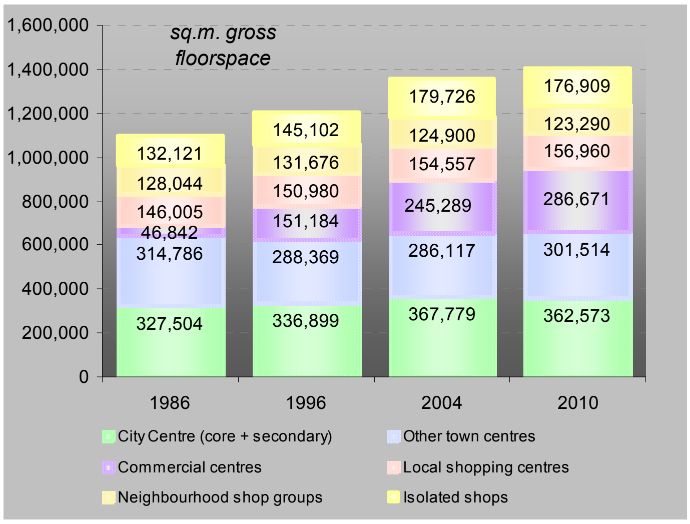
Graphs - Retail network summary: composition of shop units and floorspace
(see Also Appendix 4, Tables 1-12)

All shop units

Graph 13a) Number of shop units by position in network



Graph 13b) Floorspace by position in network

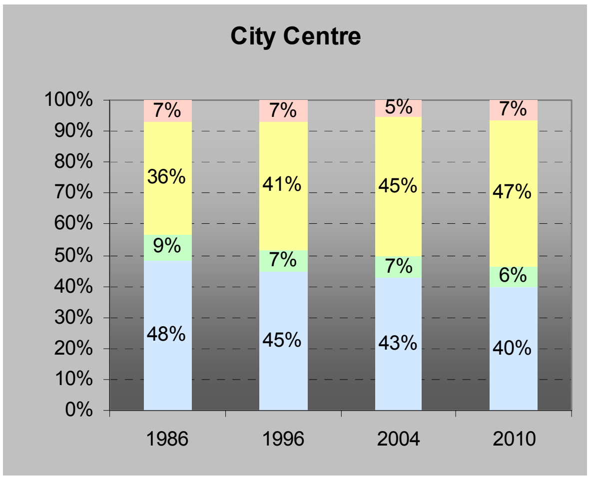


Composition by network-units

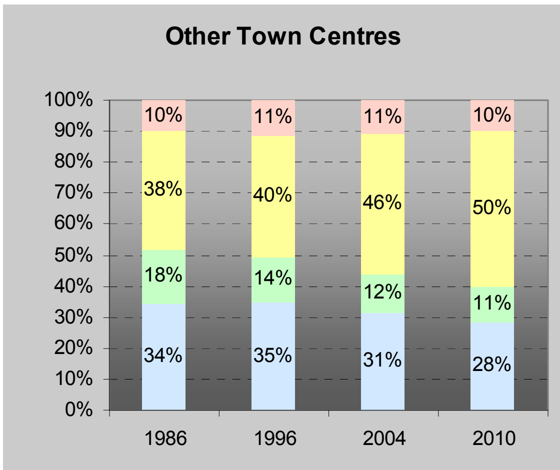
Shop unit use by type of centre 1986-2010

convenience goods shops   comparison goods shops   non-retail services   vacant shops

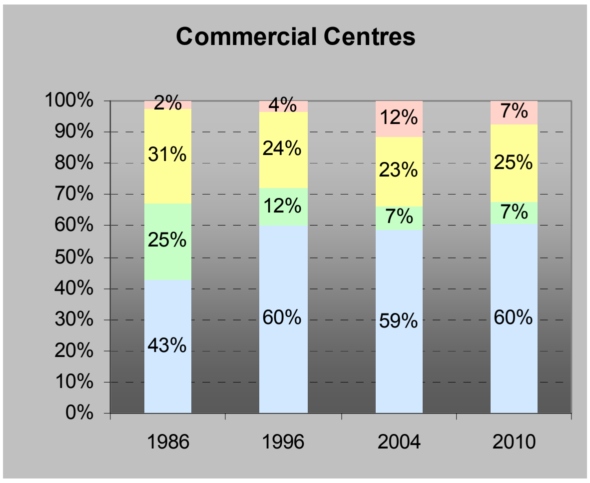
Graph 14a)



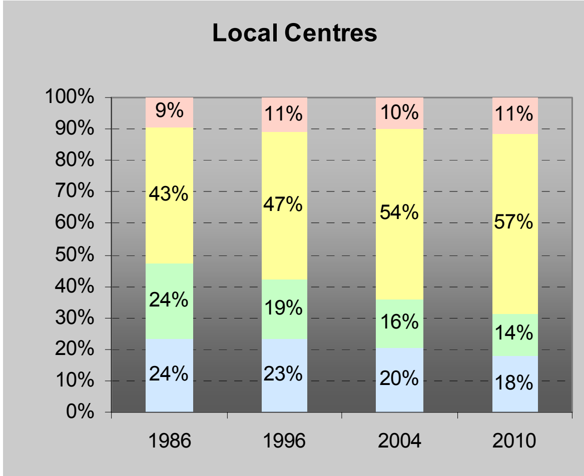
Graph 14b)



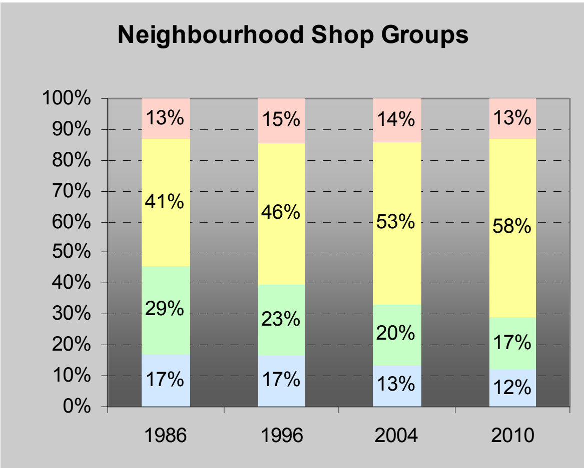
Graph 14c)



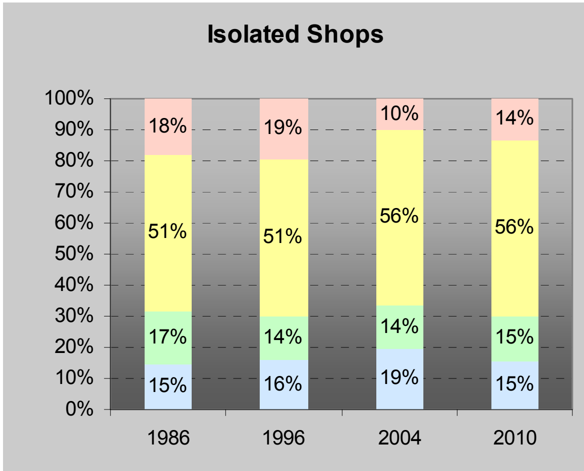
Graph 14d)



Graph 14e)



Graph 14f)

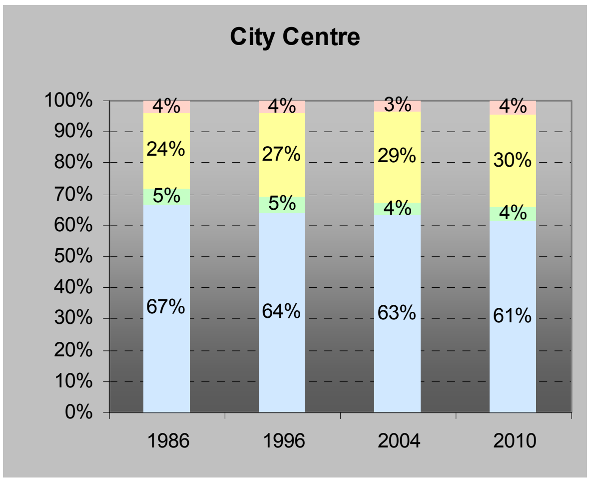


Composition by network –floorspace

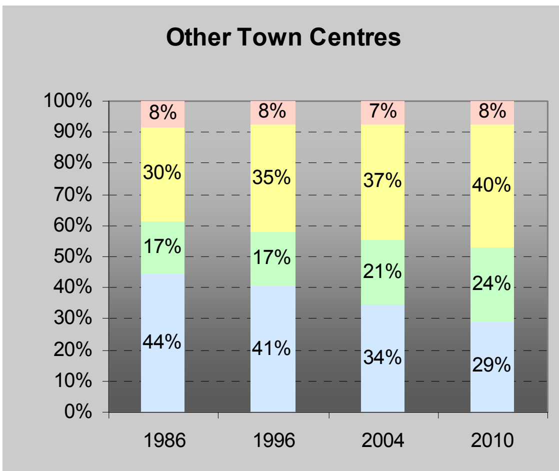
Proportion of shop floorspace by use

convenience goods shops   comparison goods shops   non-retail services   vacant shops

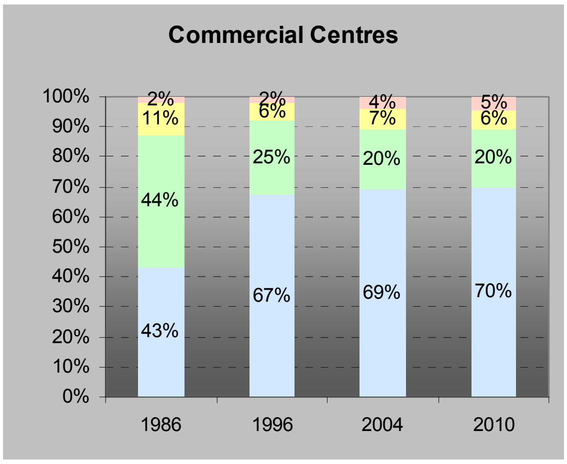
Graph 15a)



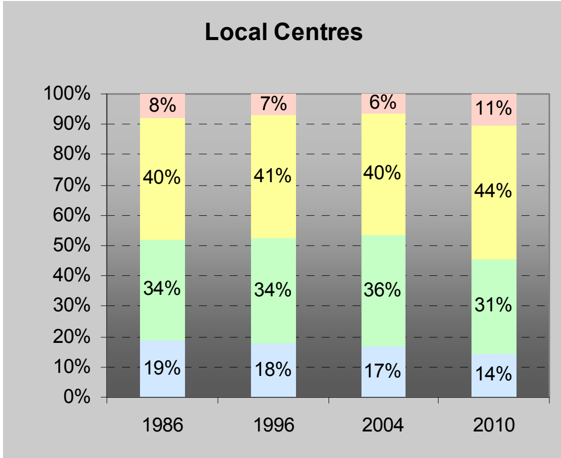
Graph 15b)



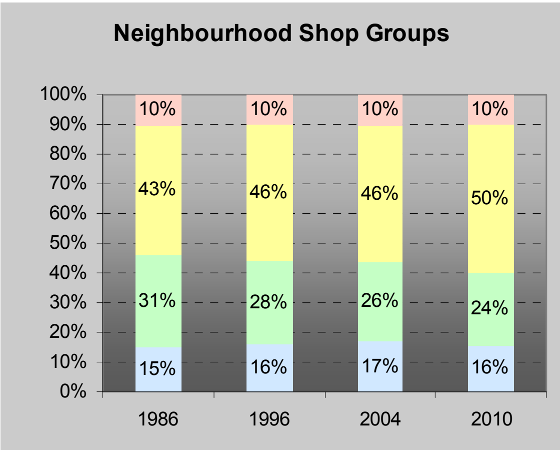
Graph 15c)



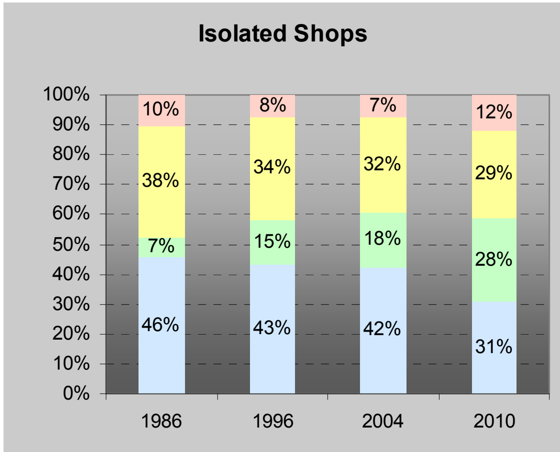
Graph 15d)



Graph 15e)



Graph 15f)

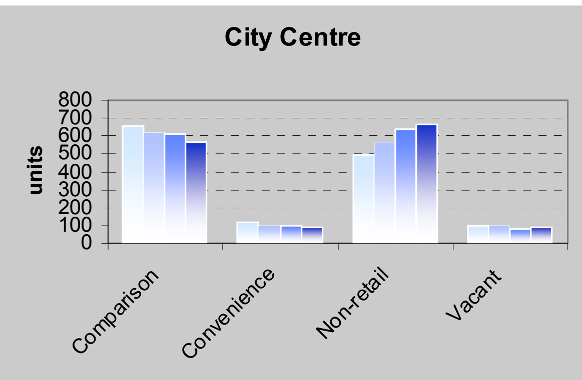


Number of shop units and floorspace by type of centre 1986-2010

1986 1996 2004 2010

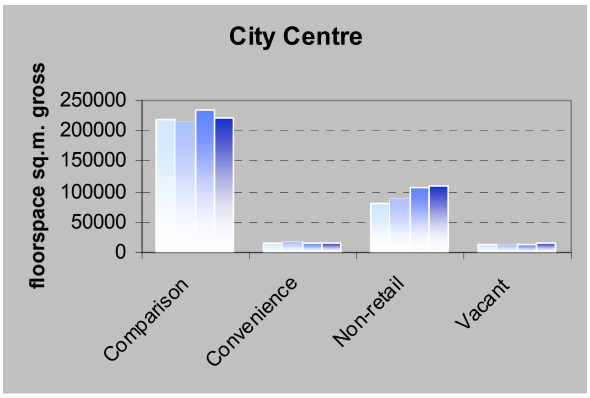
Units

Graph 16a)

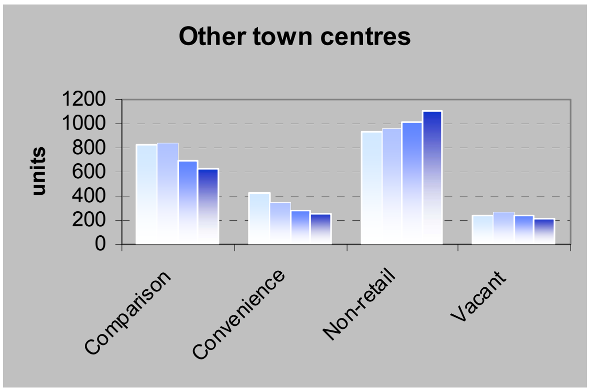


Floorspace

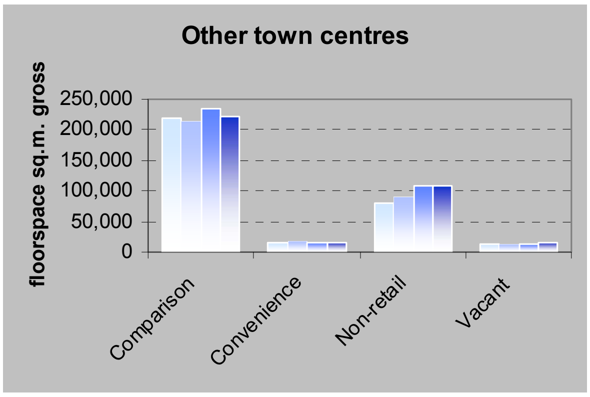
Graph 16b)



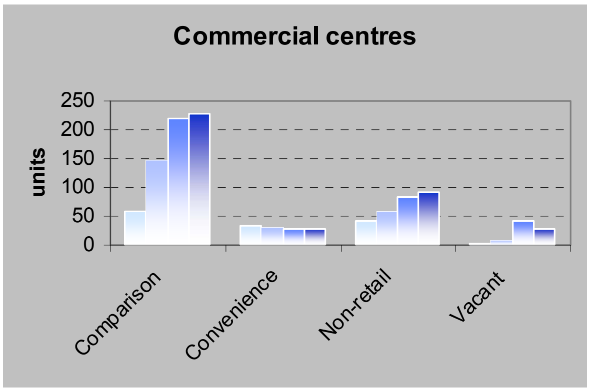
Graph 16c)



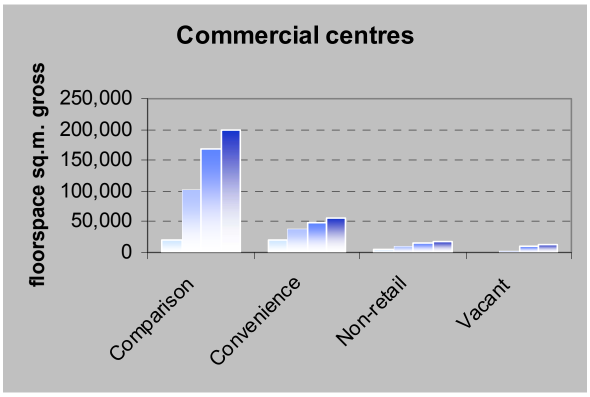
Graph 16d)



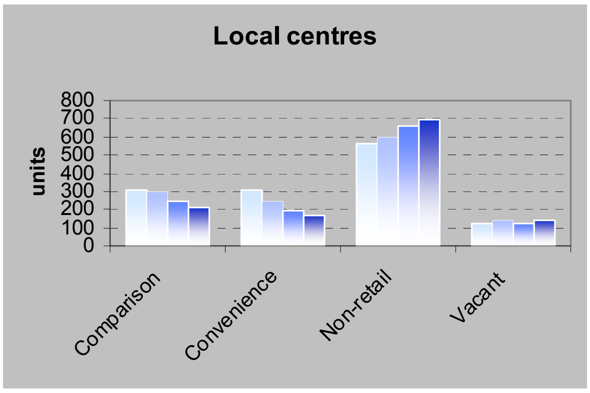
Graph 16e)



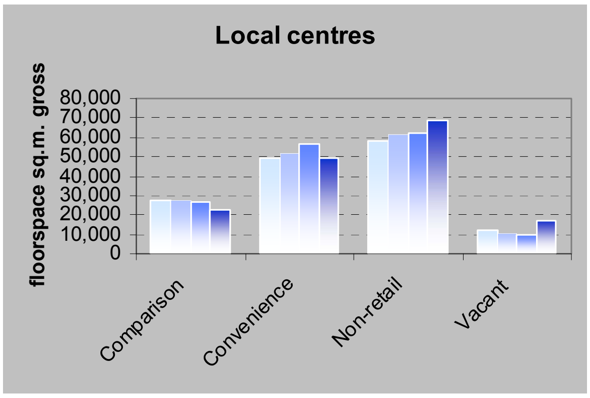
Graph 16f)



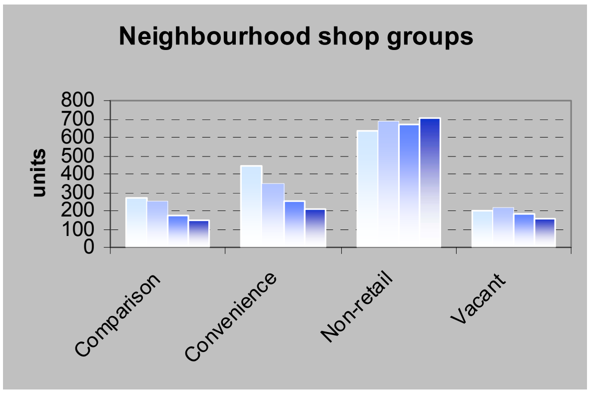
Graph 16g)



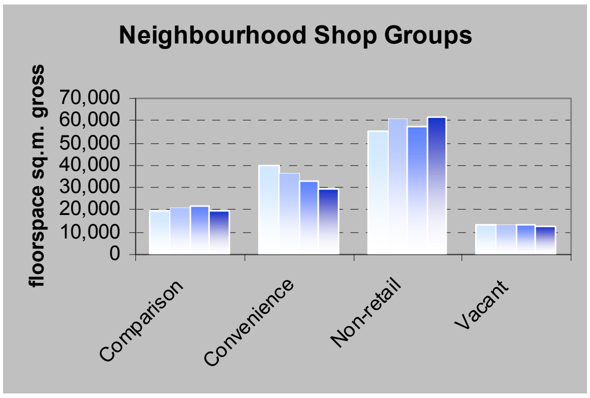
Graph 16h)



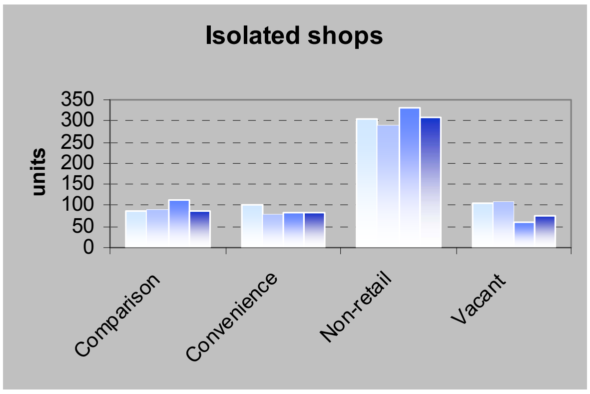
Graph 16i)



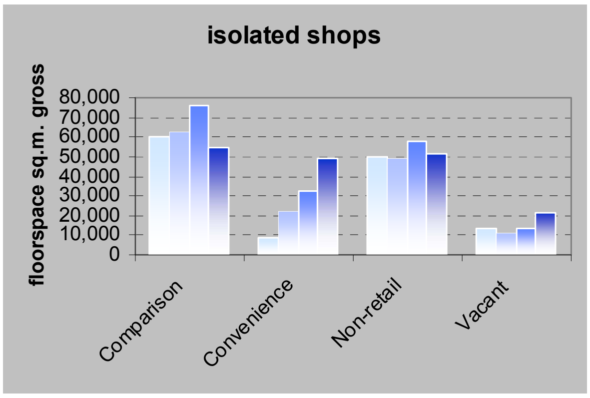
Graph 16j)



Graph 16k)

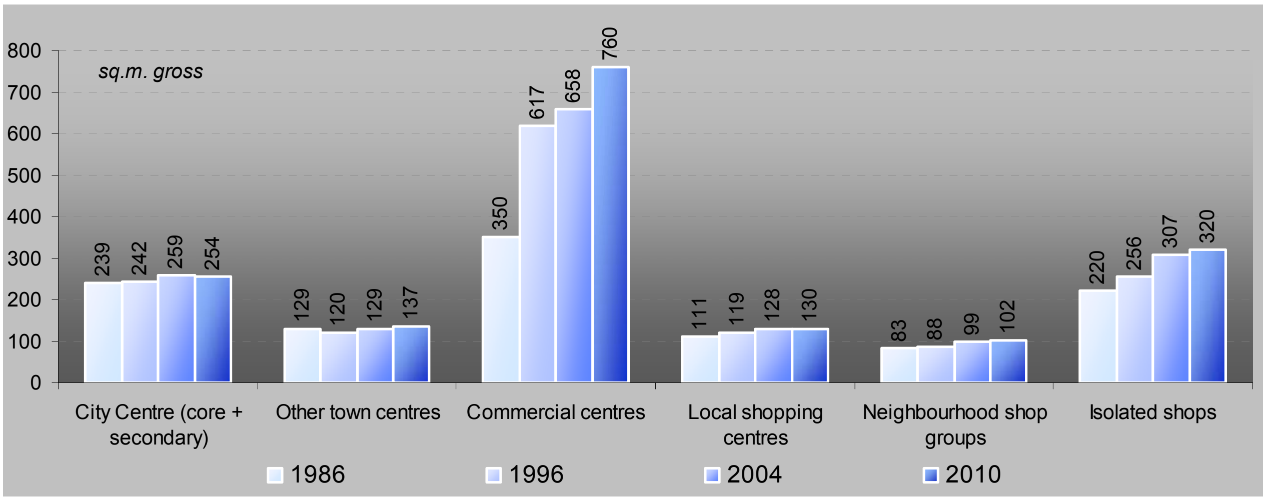


Graph 16l)



Average shop size

Graph 17 – Trends in average shop size (sq m gross)



7.0 Retail Format

- Considerable change in distribution of floorspace across retail formats.
- Retail parks have grown from virtually zero in 1986 to account for 11.5% of the city's total floorspace in 2010.
- Floorspace share of supermarkets has grown from 3% to 11.2% over the last 25 years.
- Covered shopping malls have also become more significant, rising from 6.7% to 9.3% of total floorspace

7.1 Shop units in Edinburgh have been categorised into a number of formats:
- shopping streets/parades
- covered shopping malls
- retail parks
- detached retail warehouses
- supermarkets 1,000 sq m +
- other shops

7.2 The largest number and amount of the city's shop units and floorspace is located in shopping streets (Graph 18). These are generally within town centres, local centres and neighbourhood shop groups. Over the survey period the number of units in shopping streets has fallen. This is also true of 'other shops'. This must be considered in the context of an overall fall in the total number of units in the city. The number of shop units within retail parks, covered shopping malls and supermarkets has on the other hand increased since 1986.

Examples of shopping streets

Elm Row

Cockburn St.

7.3 The amount of floorspace in shopping streets has fallen overall since 1986, although in 2010 it had increased slightly from its 2004 level. The amount within covered shopping malls, retail parks and supermarkets has increased. The total floorspace located in covered shopping malls increased by 77% between 1986 and 2010. Retail warehouse parks which were just beginning to emerge in the 1980s have grown substantially since their 1986 records. The floorspace has increased from less than 5,000 sq.m gross to over 160,000 sq m gross. The amount of floorspace in 'other shops' has varied over the period and detached retail warehouse units now have less total floorspace and units than they had in 2004.

7.4 The distribution of the city's floorspace across retail formats has changed considerably in the period (Graph 19a). In 1986, 78% of floorspace was located in shopping streets. By 2010 this had fallen to 58%. Retail parks and supermarkets have taken up a greater share of floorspace over the survey period. Covered shopping malls accounted for 9% of floorspace in 2010 and retail parks and supermarkets 11%. The proportion of floorspace within detached retail warehouse units fell to 4.5% in 2010.

7.5 In contrast with floorspace, the distribution of units across retail formats has changed only slightly in the course of the survey period (Graph 19b). The proportion of units within shopping streets fell a little, but this remains the predominant location of floorspace with 85% of the city's units. Covered shopping malls and retail parks have grown in their share of units.

7.6 Excluding service units from an analysis of retail formats reveals a similar picture to that of all shop floorspace (Graph 20). There has been a fall in the amount of floorspace in shopping streets/parades along with an increase in covered shopping malls, retail parks and supermarkets. Within detached retail warehouses there have been fluctuations over the period. While over the period 1986-2010 retail floorspace has increased, it has fallen since 2004 due to the demolition of some stand alone units.

7.7 In terms of distribution, floorspace in retail use is spread more evenly than total floorspace across the formats (Graph 21). Shopping streets contained 47% of the city's active retail floorspace at 2010. Retail parks have taken an increased proportion of retail floorspace and accounted for 12% in 2010, while detached warehouses accounted for 6%. Most floorspace within retail parks was in retail use. The overall rise in floorspace of this format has created an accompanying rise in the proportion of the city's retail floorspace within them.

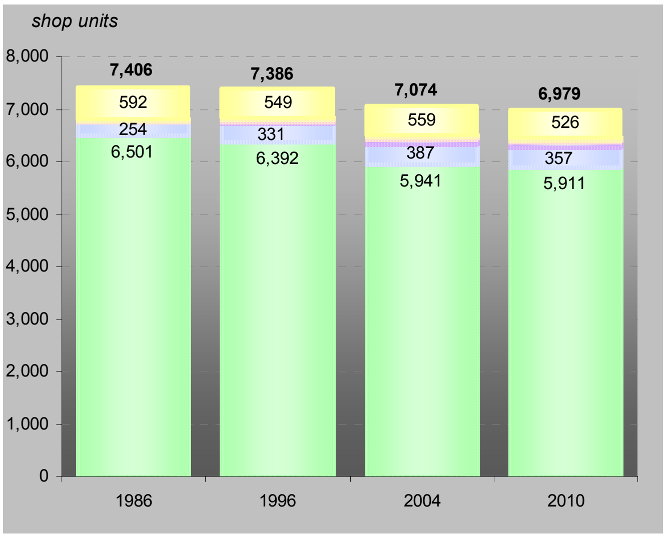
7.8 As would be expected the average size of units varies between formats (Graph 22). Supermarkets are the largest format and have increased by the greatest amount over the period (95%). All other formats increased in size overall with the exception of detached retail warehouses which reduced by 17%. Due to the variance in size between formats, the distribution of units is different to that of floorspace. Shopping streets and parades contained 80% of the city's active retail units compared with 47% of the floorspace. Retail parks at the other end of the size scale accounted for only 3% of active retail units.

Graphs - Retail Format
(see also Appendix 4, Tables 13-18)

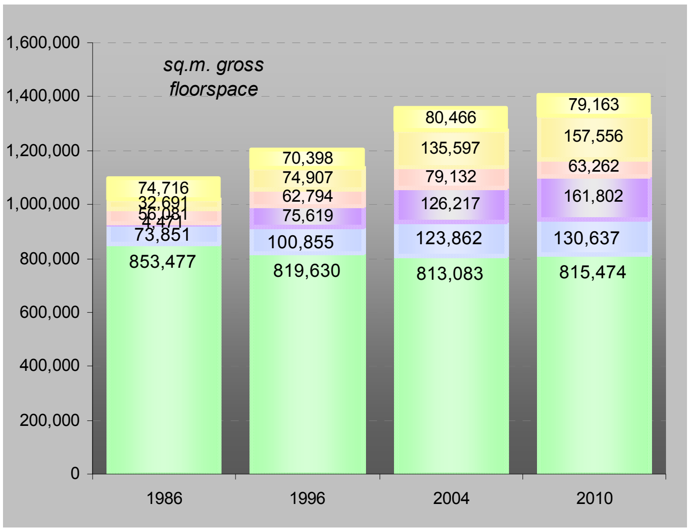
All shop units

shopping streets / parades | covered shopping malls | retail parks
detached retail warehouses | supermarkets 1,000 sq.m. + | other shops

Graph 18a) –Number of shop units by retail format

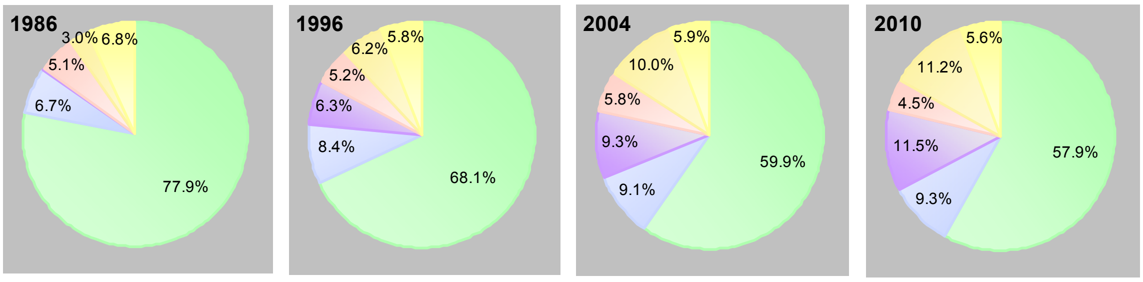


Graph 18b) Floorspace by retail format



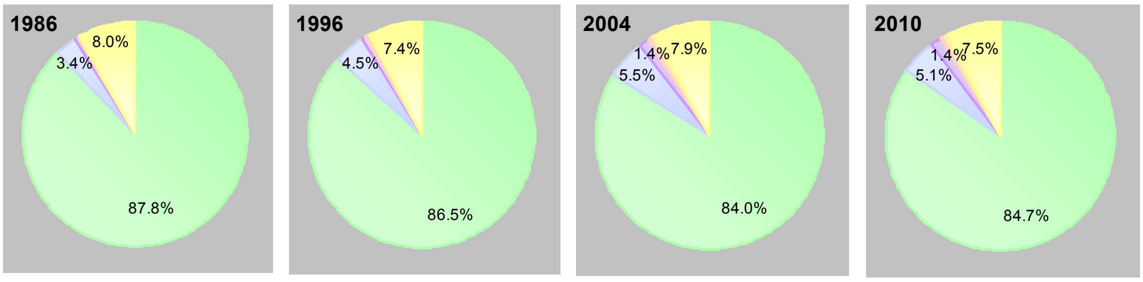
Distribution of floorspace

Graph 19a) Distribution of floorspace by retail format 1986-2010



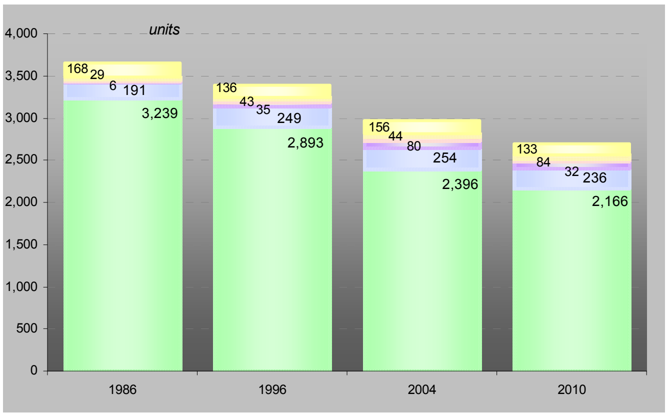
Distribution of units

Graph 19b) Distribution of shop units 1986-2010

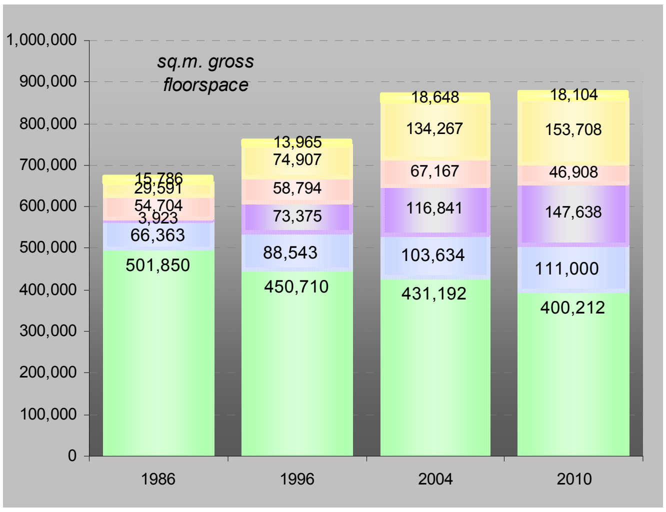


Units in retail use

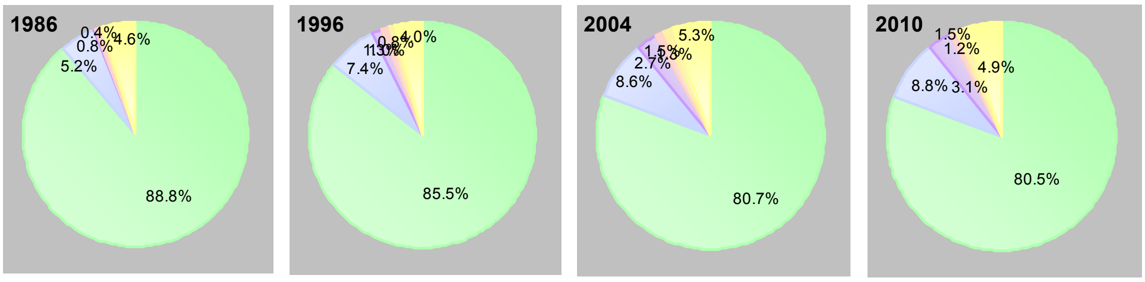
20a) No. of active retail units by retail format



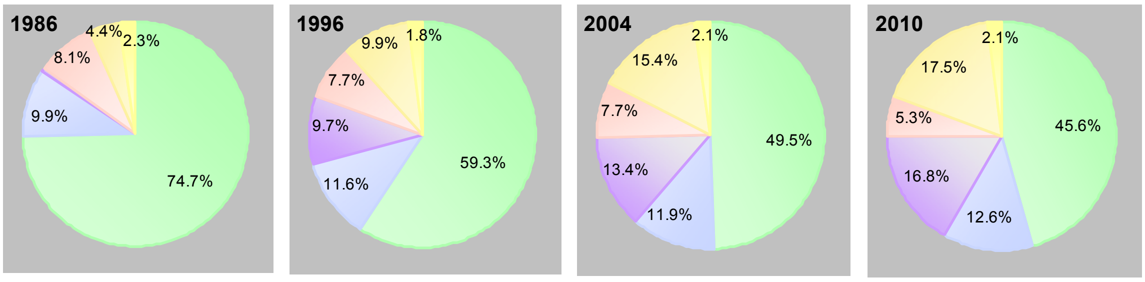
20b) Active retail floorspace by retail format



21a) Distribution of shop units in retail use 1986-2010 by retail format

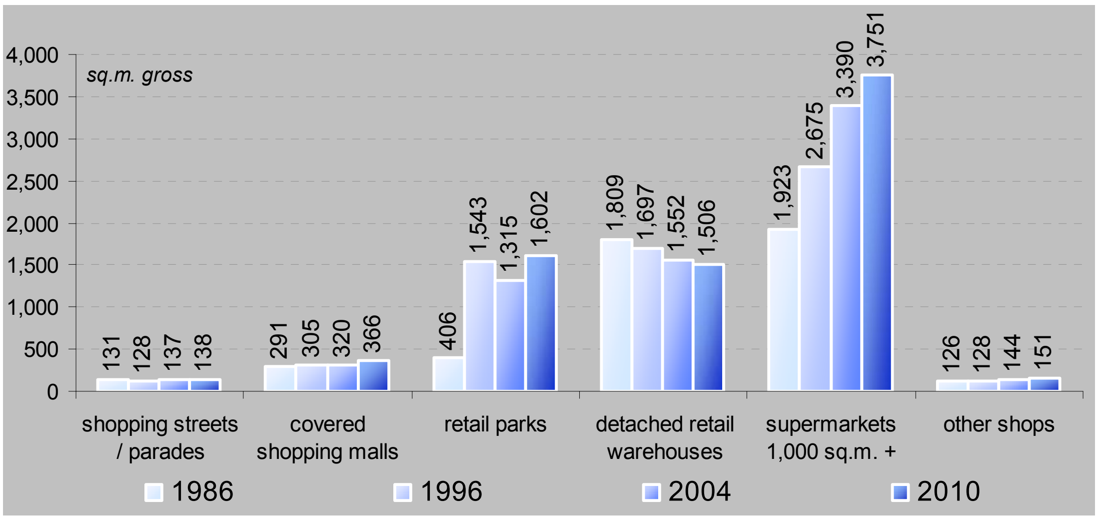


21b) Distribution of shop floorspace in retail use 1986-2010 by retail format



Average unit size

Graph 22 - Trends in average shop size by retail format 1986 -2010



8.0 Shop use by retail classification

- Use of shops has changed substantially over the survey period, reflecting broader changes in economy, society, and household spending habits.
- Much increased number of outlets providing specialist services such as health, fitness, beauty, travel, financial advice.
- Loss of specialist food retailers.
- Increase in services including served food.
- Large increases in unit numbers within some classifications. A number of classifications have doubled their number of units between 1986 and 2010. Including served food outlets; hair & beauty salons; estate agents and charity shops.
- Trend towards larger units within some classifications. Including DIY; food stores and clothing.

8.1 The nature of retailing generally is changing. There are trends towards one stop shopping and many people shop outwith traditional shop opening hours. Over the 25 years of the survey there has been significant change in the number of certain types of shops in Edinburgh. The changes are not necessarily unique to Edinburgh. Comparable data is not available for other cities, however nationally it is know that supermarkets are becoming larger and also expanding into the smaller formats often at the expense of smaller and specialist food retailers.

8.2 The survey records the type of goods sold within each of the units surveyed. This breakdown provides insight into the changes that have taken place at a detailed level. Graphs 23a-v show changes by classification. There are some sectors where the growth in units has been substantial in the period. The largest proportionate increase in shop units has been the number of other financial service units. There was growth of more than 700%. This includes financial advisers, moneylenders, pawnbrokers, mortgage and insurance brokers. Banks and building societies reduced in number of units.

8.3 Served food, fitness and active leisure, charity shops, mobile phone shops, prepared food, coffee shops, health (dentist, doctors, physiotherapists etc.), estate agents, undertakers, furniture removal have all more than doubled the number of units that they occupy since 1986. There have also been large increases in the number of chemists and opticians and hair and beauty outlets.

Fishmonger, Broughton St.

8.4 Petrol, wholesale, butchers, greengrocers, fishmongers, bakers, building societies, rental, DIY, drycleaners, gents clothing, trades have all lost more than half of units since 1986. A national programme of post office closures has seen a fall in the number of post offices in Edinburgh from a high of 65 in 1996 to 54 in 2010.

8.5 Some of the most notable losses of units:
- butchers from 163 to 26
- greengrocers from 114 to 22
- bakers from 157 to 69

- newsagents from 320 to 191
- post offices reduced by half

8.6 Some of the most notable increases in units:
- coffee shops from 14 to 64
- charity shops doubled - however virtually all this increase occurred between 1986 and 1996
- served food outlets almost doubled

8.7 The change in units was generally reflected in the change in floorspace. However there were some exceptions to this. The number of DIY stores fell while floorspace increased by 40%, reflecting the trend towards DIY superstores. Large general foodstores and small general foodstores (convenience stores), ladies and children's clothing, leather goods, electrical and musical goods, hardware, books, bicycles and prams, florist and gardening supplies, large mixed comparison shops, betting shops and amusement centres all lost units and increased floorspace. This reflects the trend towards larger units.

Charity shops, High St

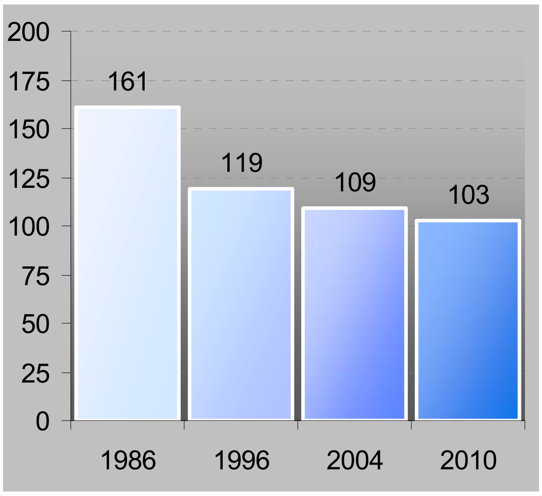
8.8 In more recent years (2004-2010) there has been a significant fall in the number of rental/hire shops of 61%. The number of petrol and service stations fell by more than 90% between 1996 and 2010, wholesalers declined by 85% in this period. The number of travel agents fell by 37% between 2004 and 2010. Estate and letting agents increased by 154% between 1996 and 2010.

8.9 Research by Colliers on multiple shop representation (A Re-assessment of Retail Structure) gives an indication of the changes in other parts of the UK. Retailers who have experienced the greatest increase in outlet numbers in the UK are mobile phone shops, charity shops, chemists and convenience stores, food specialists, clothing and footwear and cards and stationery. Principal losers are off-licences, newsagents, books/toys/CDs and household appliances, furniture and carpets, clothing and footwear and general food. Representation of catering outlets has increased while motor and financial services have fallen.

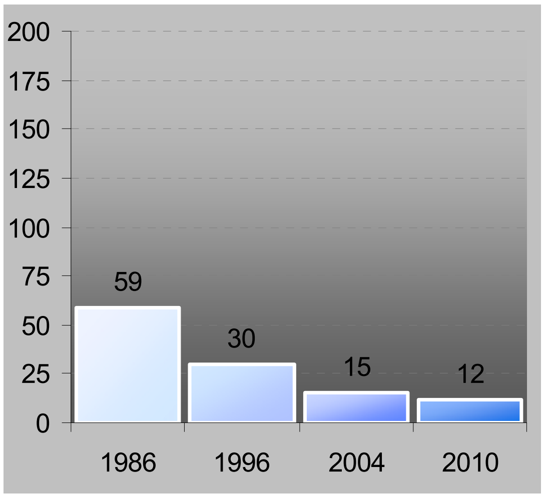
8.10 The changes which have taken place in Edinburgh are largely in line with trends at a national level. The changes in types of retailers can have an impact on individual centres, for example reducing numbers of banks and post offices could have a big impact on footfall within centres.

Graphs - Shop use by retail classification

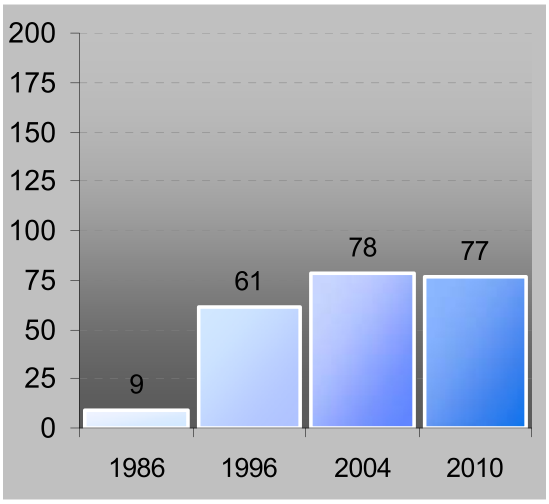
23a) No. of bank branches



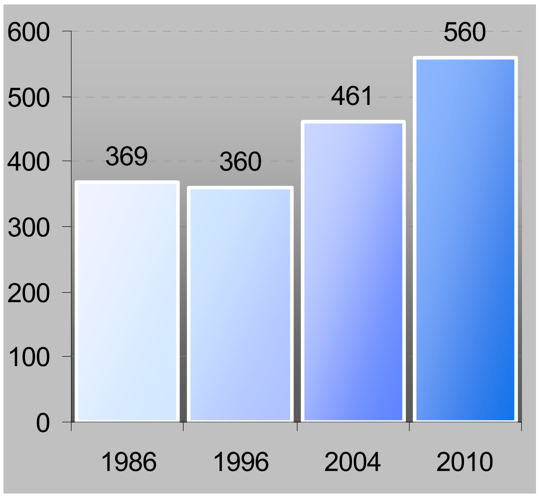
23b) No. of building society branches



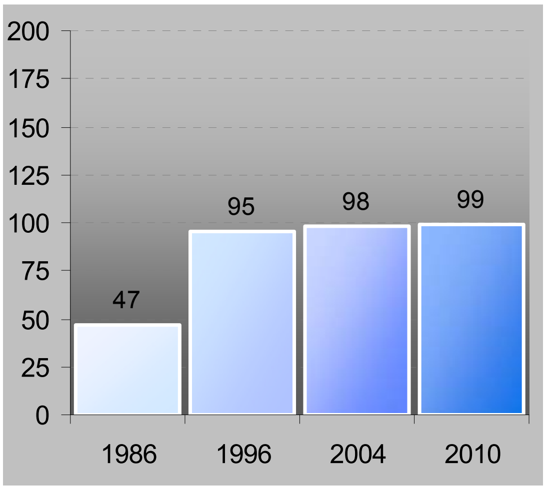
23c) No. of other financial services



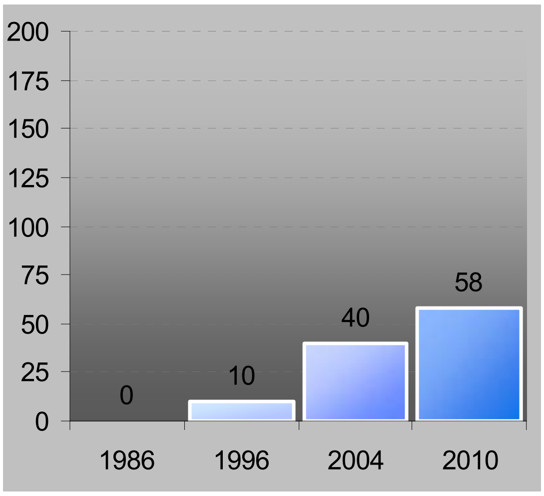
23d) No. of hairdressers/beauty salons



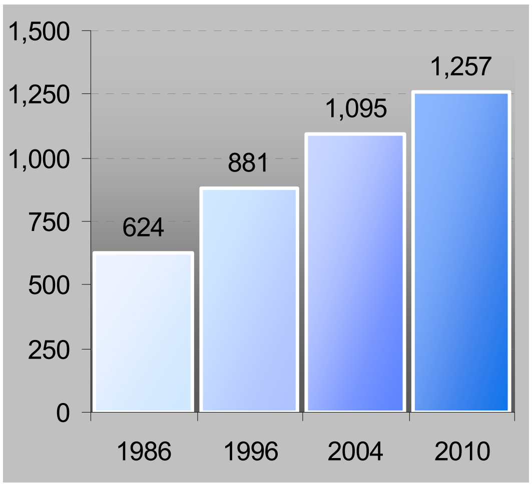
23e) No. of charity shops



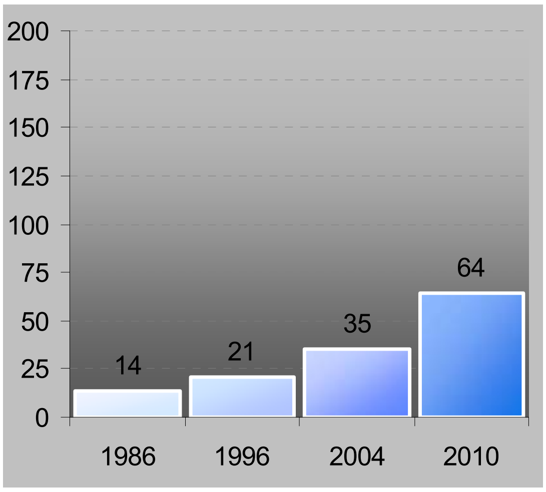
23f) No. of mobile phone shops



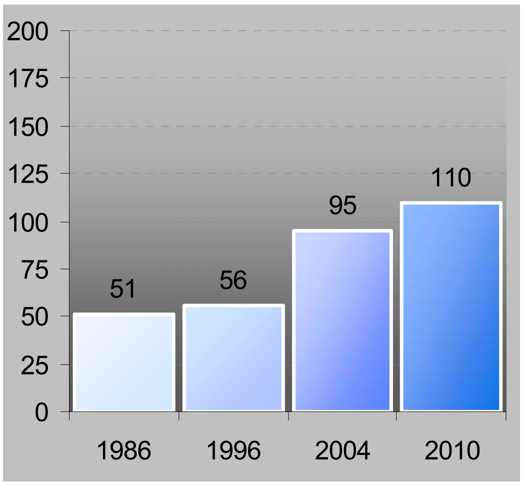
23g) No. of shops serving prepared food



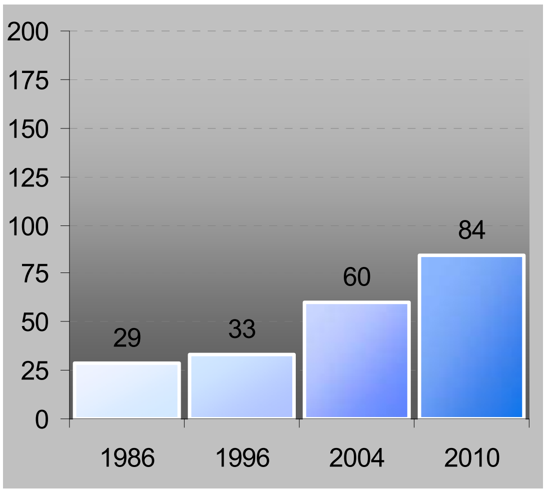
23h) No. of coffee shops/tea rooms



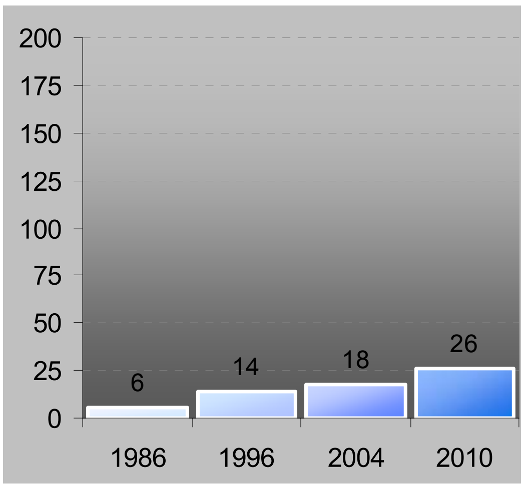
23i) No. of shop based health related services



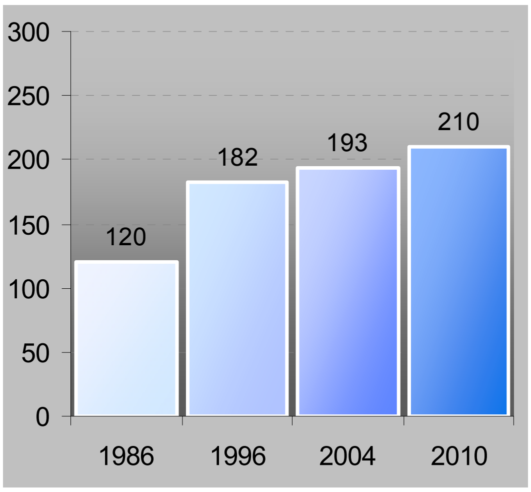
23j) No. of estate & lettings agents



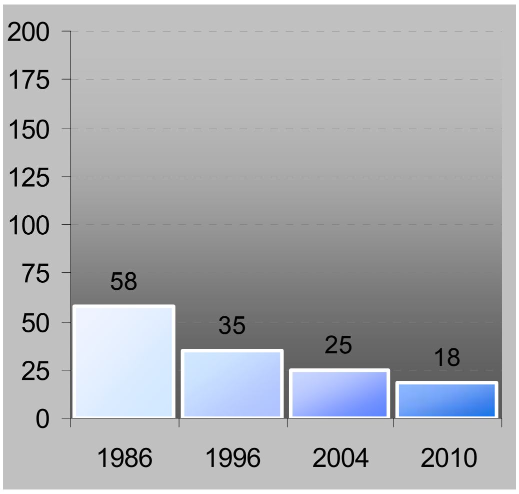
23k) No. of undertakers



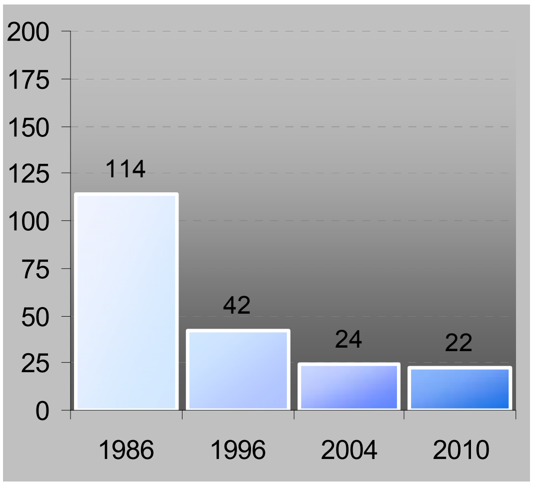
23l) No. of chemists and opticians



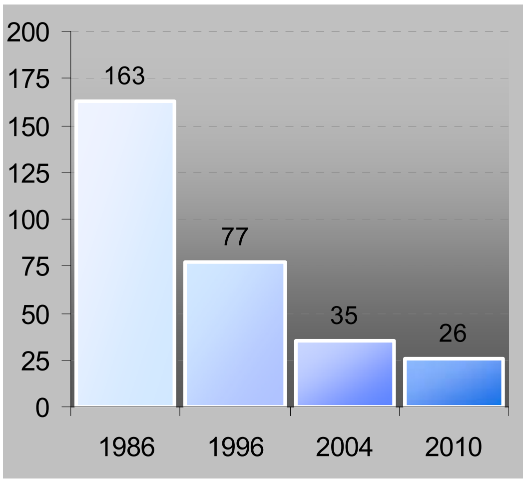
23m) No. of fishmongers



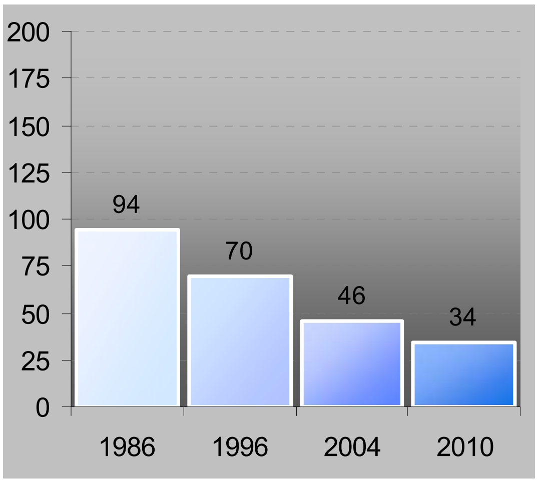
23n) No. of greengrocers



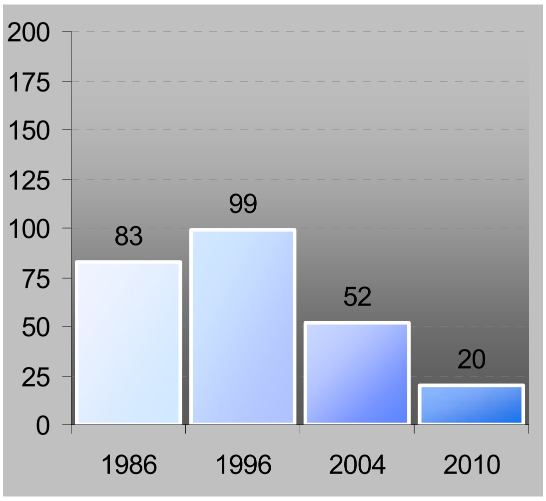
23o) No of butchers/poulterers



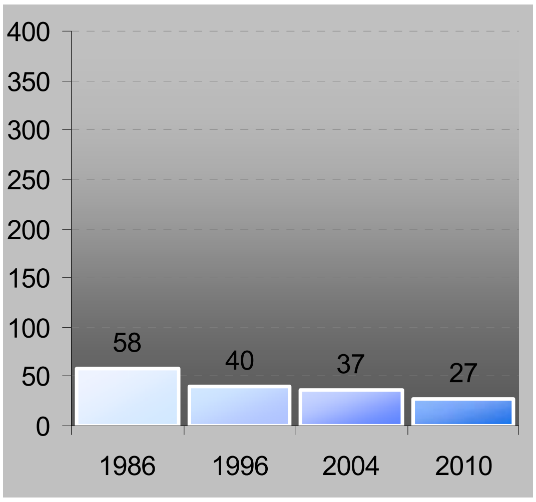
23p) No. of drycleaners/launderettes



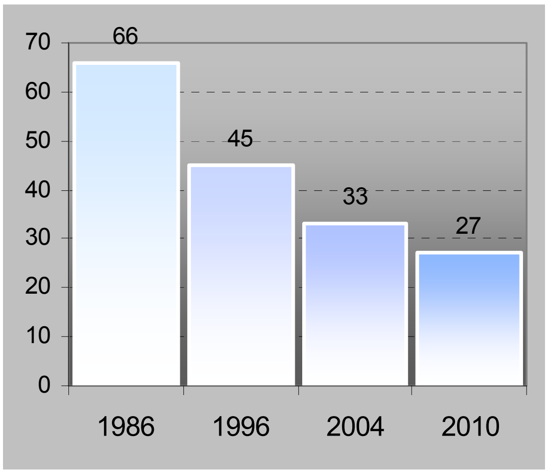
23q) No of rental/hire shops



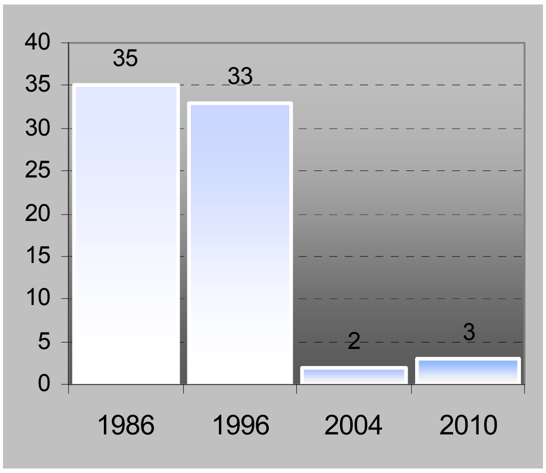
23r) No of specialist gents clothing



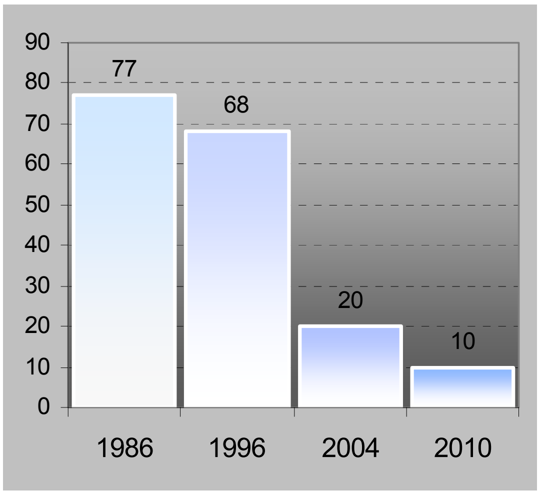
23s) No. of DIY



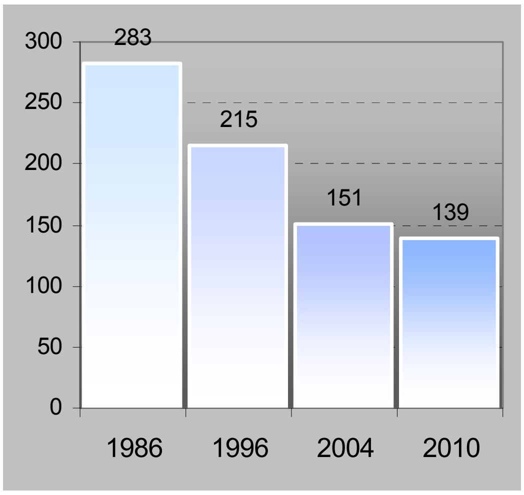
23t) No. of petrol & service stations



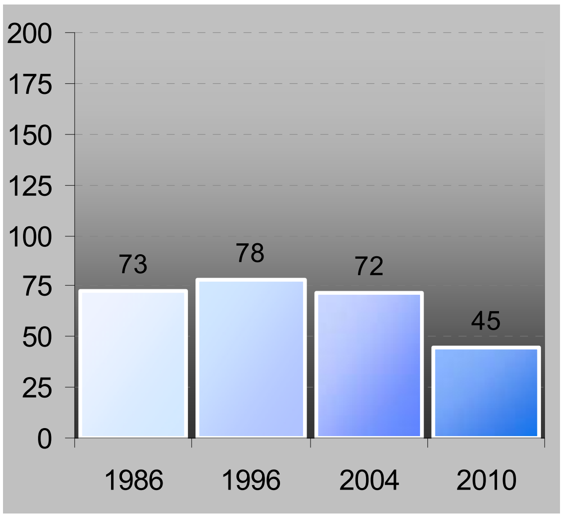
23u) No. of wholesalers



23v) No. of trades



23w) No. of travel agents



IN FOCUS

9.0 City Centre

- Increase in units across the city centre of 4%.
- Increase in proportion of units in non-retail use from 36% to 47%. Greatest increase in non-retail units has been in the Old Town (from 31% to 52%)
- Convenience units make up only 6% of city centre units.
- Variation in composition between sub areas. West End most service oriented-60% of floorspace was in non-retail use at 2010.

9.1 The city centre has been divided into five sub areas:

- city centre core
- West End
- Old Town
- New Town
- High St. / Bridges

9.2 Between 1986 and 2010 the number of shop units increased in the city centre from 1,369 to 1,425 (Graph 24). The total number of shop units increased in all sub areas of the city centre. The city centre core gained the greatest number of units (27) between 1986 and 2010.

*Shop front, George St.**

9.3 Floorspace of the city centre increased by 11% (Graph 25). Floorspace increased in all sub areas with the exception of High St/ Bridges which lost 10% of floorspace.

9.4 The vacancy rate of the city centre was 7% in 2010 (Graph 26). This is the same rate as in 1986. The rate fell to 5% in 2004. At 2010 vacancy rates within sub areas varied from 5% to 9%. High Street/Bridges, the Old Town and New Town had the lowest vacancy rate of 5 %. The West End had the highest rate of 9%. Since 1986 vacancy rate in the West End and city centre core have been increasing. The vacancy rate in the other sub areas had been declining until 2004 however all areas had increased vacancy rates at 2010.

9.5 The number of units occupied by non-retail services has increased in the city centre from 497 to 669, an increase of 35%. The increase occurred across all sub areas. The Old Town has had the greatest increase in number of non-retail services (62%).

9.6 The proportion of units in non-retail use has increased in all areas of the city centre. The total city centre had 47% of its units in non-retail use at 2010 compared with 36% in 1986. The West End had the highest proportion of its units in non-retail use at 2010 (55%). The city centre core had the lowest proportion (42%). The greatest increase in proportion of non-retail was within the Old Town.

9.7 The composition of the city centre has changed since 1986 (Graph 27). As the proportion of non-retail has increased, comparison and convenience have fallen. At 2010 the city centre had 47% of its units in non-retail use. 40% was in comparison use and just 6% in convenience use.

9.8 The composition of the city centre core is different to that of the other sub areas. It has a high proportion of units in comparison use at 45% and low proportion of non-retail (42%). High St/Bridges, Old Town and New Town share a similar composition to each other. They each have around half their units in non-retail use, over a third in comparison use, 7% in convenience use and have 5% of units vacant.

9.9 The floorspace composition presents a different picture to units (Graph 28). Only 30% of the city centre floorspace was in non-retail use at 2010. Floorspace composition of sub areas varies. The West End is the least retail oriented of sub areas with 60% of it's floorspace in non-retail use. In contrast the city centre core has only 22%.

9.10 There was a fall in the number of city centre units selling convenience goods between 1986 and 2010 from 118 to 92. The city centre core and Old Town were the only sub areas to have a net loss of convenience units in this period. Convenience units make up a small proportion of the city centre in comparison to Edinburgh overall (Graph 29). Only 6% of city centre units were in convenience use at 2010. This reduced from 19% in 1986. Most sub areas have also experienced a reduced proportion of units selling convenience goods. The largest reduction was in the West End and New Town. High Street and Old Town experienced a slight increase in proportion of units in convenience use.

9.11 Across the city centre there has been a slight increase in the amount of convenience floorspace since 1986 with closures in the period between 1996 and 2004 being redressed by the more recent opening of a number of 'express' style supermarkets. Convenience goods floorspace increased in the city centre core, despite the reduction in number of convenience units in this sub area, and High St./Bridges. As with units, convenience floorspace makes up a small proportion of the city centre compared with other centres (Graph 30). Only 4% of the city centre floorspace was in convenience use at 2010. This has fallen only slightly from 5% in 1986. Of all sub areas the West End had the highest proportion of its floorspace in convenience use (8%). This area has also experienced the greatest reduction in proportion of convenience floorspace between 1986 and 2010, falling from 19%.

9.12 The number of comparison units has fallen in all sub areas with the exception of the New Town which is unchanged since 1986. The Old Town has lost the greatest proportion of comparison units (30%) between 1986 and 2010. As would be expected the city centre core has the highest proportion of its floorspace and units in comparison use. This proportion has however reduced since 1986. In 1986, 51% of city centre core units and 73% of floorspace was in comparison use. By 2010 this had fallen to 45% of

*Shop front, Grassmarket**

units and 70% of floorspace. There is some variance between the sub areas. The West End had the lowest proportion of floorspace (24%) and units (28%) in comparison use. The proportion of comparison floorspace has fallen in all sub areas except for the New Town which increased from 42% to 48%.

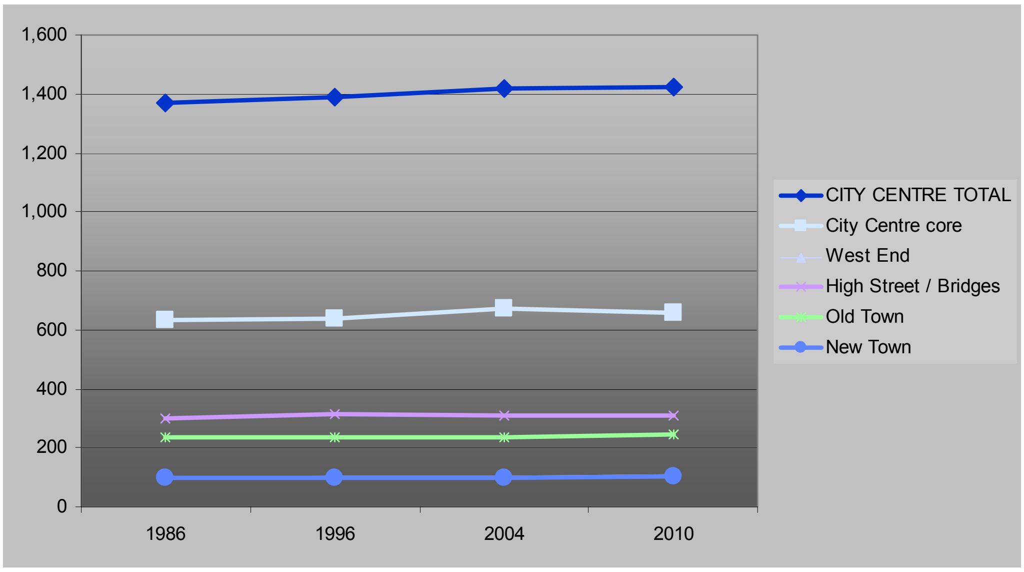
9.13 There was a small increase in the average size of city centre units between 1986 and 2010. Average size at 2010 was 254 sq m. The average size of unit was greatest in the city centre core. The Old Town had the smallest average size. The average size of unit has increased since 1986 in all areas except for High St/Bridges. The largest comparison units are located within the city centre.

images courtesy of Edinburgh Inspiring Capital www.edinburgh-inspiringcapital.com

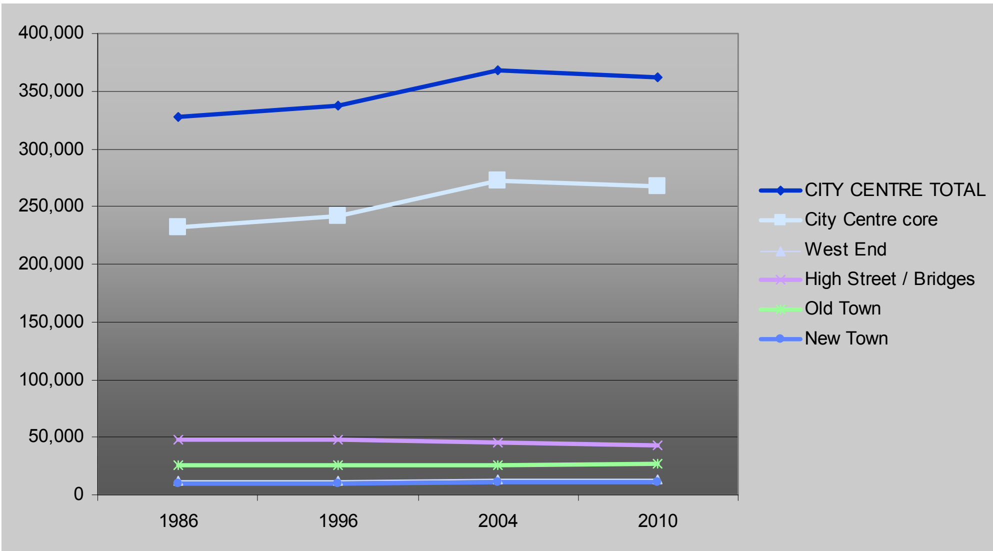
Graphs – City Centre
(see also Appendix 4, Tables 20-22)

All shop units

Graph 24 - Total shop Units 1986-2010

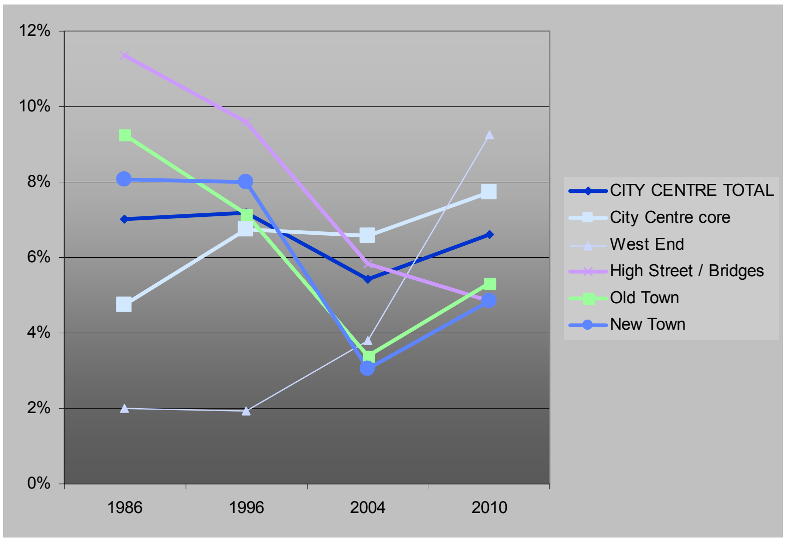


Graph 25 - Total floorspace 1986-2010



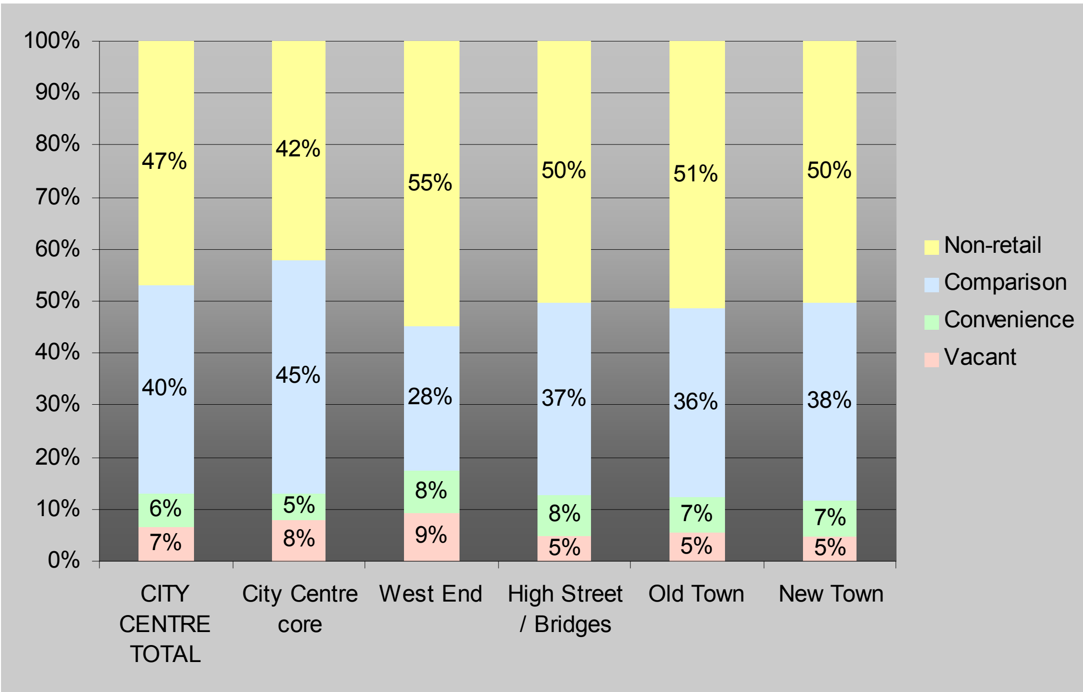
Vacancies

Graph 26 - Vacancy Rates 1986-2010

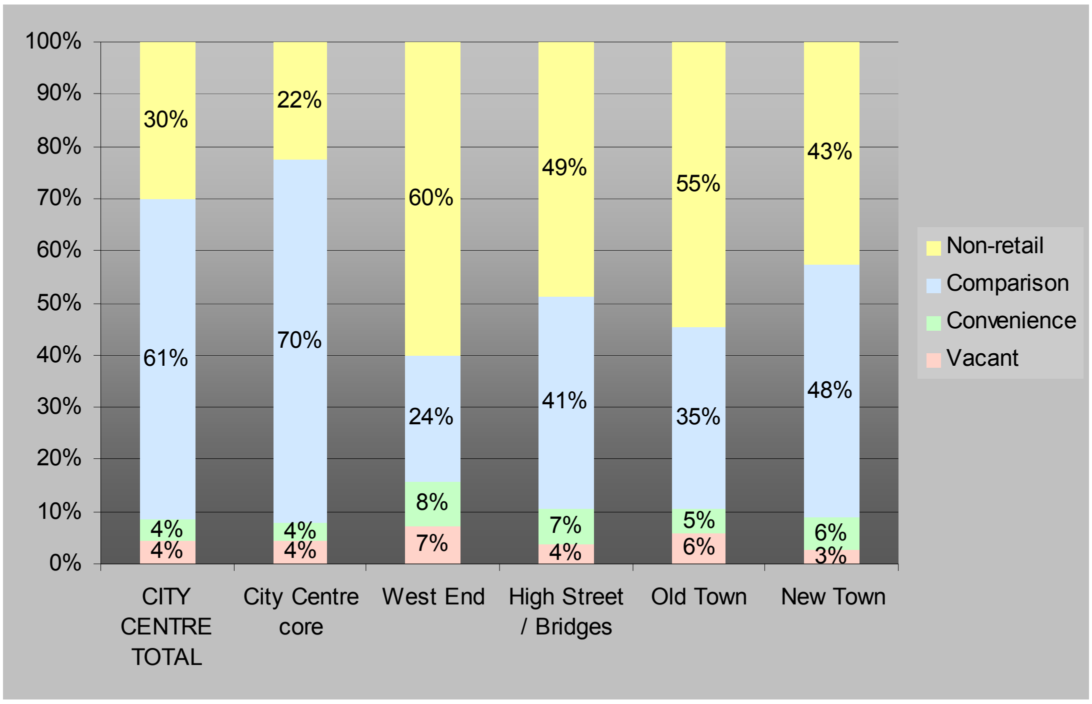


Composition of all units

Graph 27 - Composition of units 2010



Graph 28 - Composition of floorspace 2010

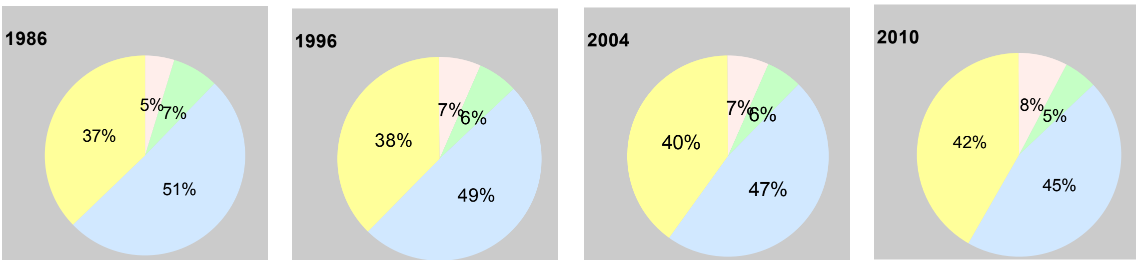


Composition of sub areas-units

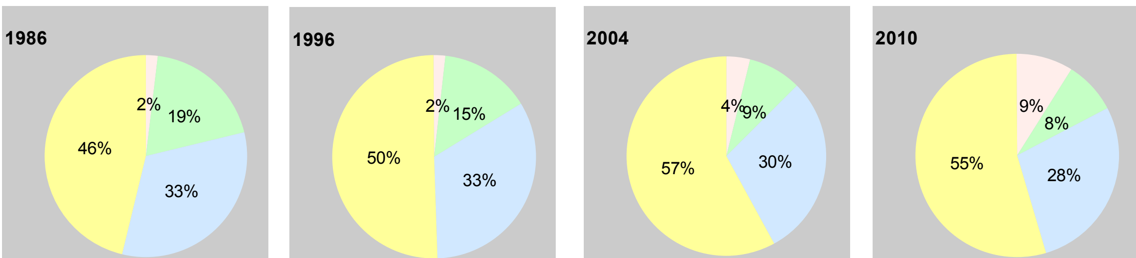
Graph 29 - Composition of units by city centre sub area

Vacant Comparison Convenience Non-retail

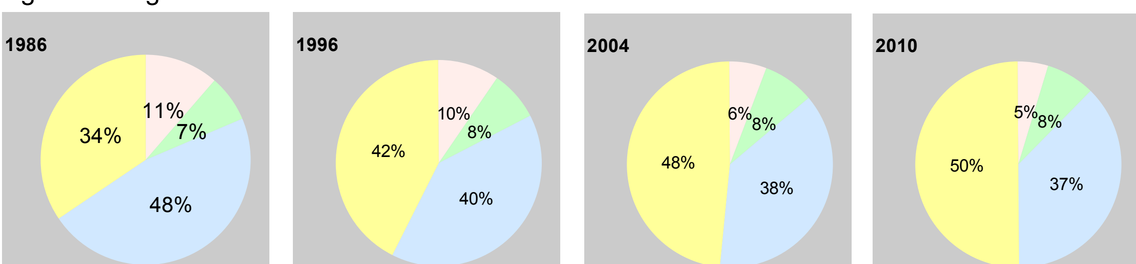
City Centre Core



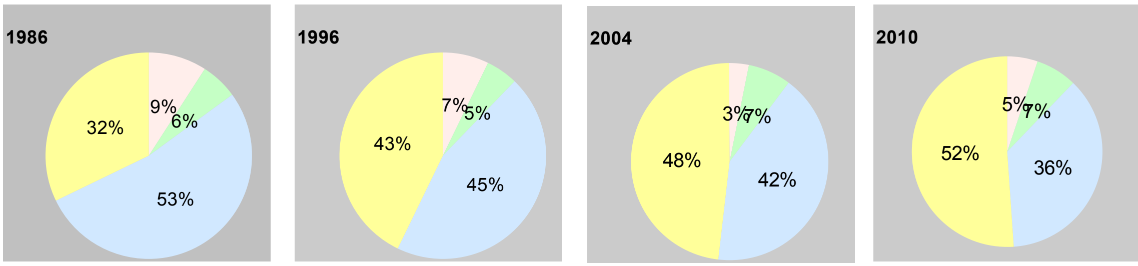
West End



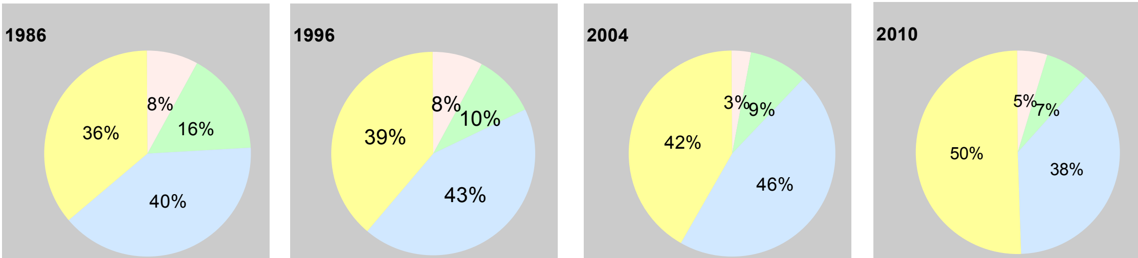
High St/ Bridges



Old Town



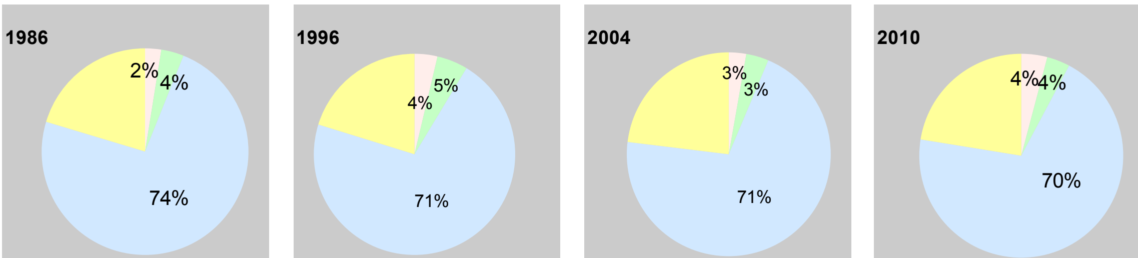
New Town



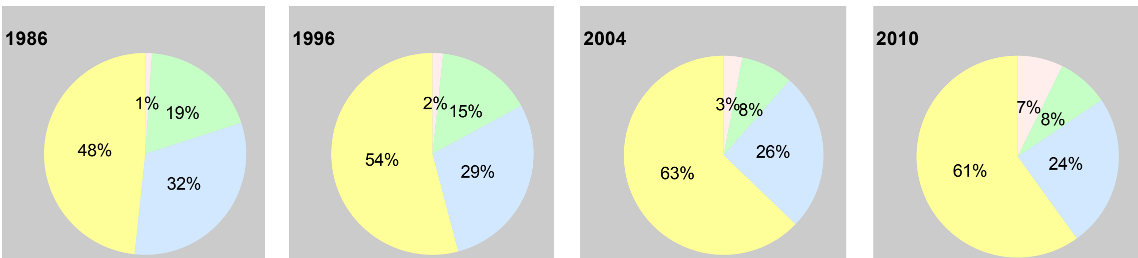
Composition of sub areas-floorspace

Graph 30 - Composition of floorspace

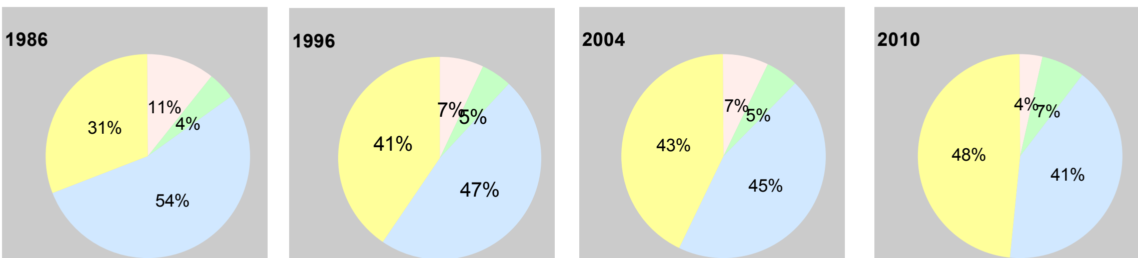
City centre core



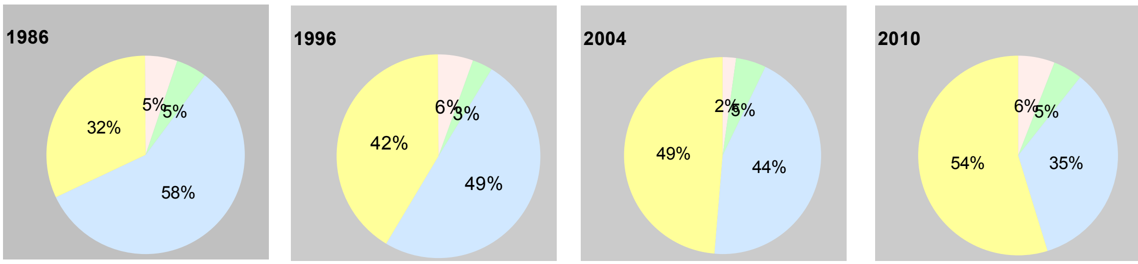
West End



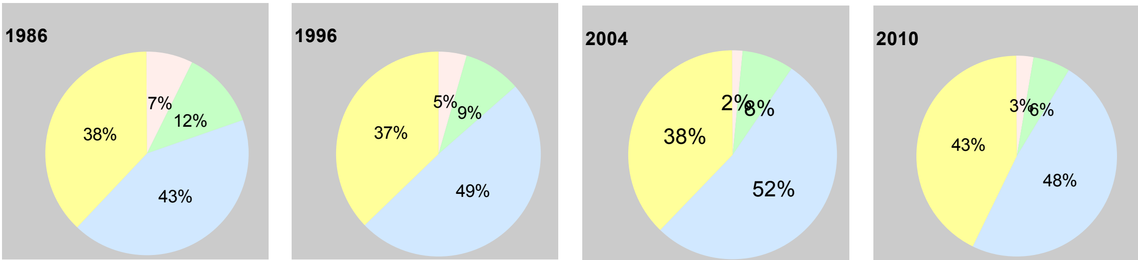
High Street / Bridges



Old Town



New Town



10.0 Town Centres (including city centre) V Commercial Centres

- 70% of city's total floorspace located in town centres (including city centre)
- The proportion of floorspace in commercial centres has grown from 4% to 20% over the last 25 years while the share in town centres (excluding the city centre) has fallen from 29% to 21%.
- In terms of floorspace in active retail use the newer commercial centres now have 1.6 times as much space as the city's longer established town centres.
- 42% of town/city centre floorspace in active retail use v 68% in commercial centres.
- Fall in active retail floorspace of town centres v relatively little in commercial centres.
- Fall in comparison units in town/city centre v increase in commercial centres
- Average unit size of city centre 254 sq m v 760 sq m in commercial centres.

10.1 Commercial centres in Edinburgh are the four major free-standing shopping malls –Ocean Terminal, the Gyle, Cameron Toll and Wester Hailes and the four other retail destinations-Newcraighall/The Jewel, Craigleith, Hermiston Gait and Meadowbank. Each of the commercial centres plays a distinctive role in the retail network. The centres play a key role in meeting the region's shopping needs, and have been the focus for substantial investment. Such 'out of town' centres can be a threat to the vitality and viability of town centres including the city centre and, unless controlled their expansion could potentially undermine the structure plan objective of promoting the city centre as the principal destination for comparison shopping in the east of Scotland.

Ocean Terminal

10.2 Edinburgh has 9 'town centres' in addition to the city centre (which is also classed as a town centre in planning policy terms, and is regarded as the pre-eminent town centre in Edinburgh and the Lothians. These are:: Corstorphine, Gorgie/Dalry, Leith Central, Leith Walk, Morningside/Bruntsfield, Nicolson St./Clerk St, Portobello, Stockbridge and Tollcross. Town centres tend to consist mainly of traditional units under tenemental flats fronting busy main roads. They tend to be set within high density residential areas and are well served by frequent bus services.

Nicolson St./Clerk St.

10.3 70% of Edinburgh's floorspace is located within the city centre or town centres. The amount of floorspace in the city centre and town centres combined increased between 1986 and 2010 (Graph 31a). Town centres had less floorspace in 2010 than they had in 1986. The floorspace of town centres fell at each survey year until 2010 when there was an increase in floorspace. This may have been due to additional supermarket floorspace as there were a number of supermarket openings in 2007/08 within the boundary of the town centres surveyed. The city centre findings show a slight reduction in floorspace between 2004 and 2010. This can be explained by the redevelopment of floorspace in Princes Street which is not included within the floorspace totals due to its status at the time of survey. While the amount of floorspace in the city and town centres combined increased by 3% the amount of floorspace within commercial centres had increased six fold since 1986. The city centre on its own has had a more modest increase of 11% while town centres actually lost 4% of floorspace.

10.4 The number of units in the city centre increased slightly from 1,369 to 1,425 (Graph 31b). Town centres lost units; falling from 2,444 to 2,204. In contrast the number of units in commercial centres more than doubled from 134 to 377.

10.5 The proportion of the city's floorspace located in commercial centres has been increasing (Graph 32a). At 1986, 4% of floorspace was located in commercial centres. At 2010 this had increased to 20%. This has reduced the proportion of floorspace within town centres to a greater extent than the city centre. Town centres accounted for 21% of floorspace in 2010, a fall from 29% in 1986. The city centre's share was 30% in 1986 and fell to 26% in 2010. The combined share of town centre and city centre floorspace has fallen from 59% to 47%.

10.6 Compared to floorspace, there has not been such a great change in the distribution of units between the city centre, town centres and commercial centres (Graph 32b). Commercial centres have increased their share of units to 5% from 2% in 1986; again at the expense of town centres where the share has fallen from 33% to 32%. The city centre has actually increased its share of units slightly to 20% from 18%. At 2010, 20% of units were in the city centre, 32% in town centres and 5% in commercial centres.

10.7 When considering only those units in active retail use the distribution of units between commercial centres and town centres is similar to total units (Graph 34a). Active retail units are only those units used for the sale of retail goods. They exclude services and vacant units. The number of active retail units has fallen in both the city centre and town centres (Graph 33a). In contrast the number of units in active retail use in commercial centres has increased. The total number of units also fell in town centres which will account for some of the decrease in active retail however total units in the city centre increased.

10.8 The proportion of city centre and town centre floorspace which is in active retail use fell between 1986 and 2010 (Graph 34b). The scale of decrease was greater in town centres than the city centre. At 2010, 46% of the city centre floorspace and 40% of the town centre floorspace was in active retail use. In commercial centres the proportion remained relatively unchanged – 68% at 2010.

10.9 Town centres had the largest share of the city's active retail units (Graph 35a). At 2010, 33% was located within town centres. The city centre contained 25%. Over the course of the survey period the proportion of the city's active retail units located in town centres and the city centre has reduced as commercial centres have grown. Commercial centres accounted for 10% of the city's active retail units in 2010.

10.10 In terms of distribution, town centres contain a smaller proportion of the city's active retail floorspace compared with proportion of total floorspace. 18% of the city's active retail floorspace was located in town centres in 2010 compared with 21% of total floorspace (Graph 35b). This is a reflection of the number of services which are often part of traditional town centres which do not feature to such a great extent in the commercial centres. The proportion of the city's active retail floorspace located in commercial centres has increased from 6% to 29% between 1986 and 2010. Commercial centres combined now have a greater proportion of the city's active retail floorspace than the city centre (27%).

10.11 Since 1986 the amount of convenience floorspace has increased in the city centre, town centres and commercial centres. The greatest increase occurred in commercial centres. Convenience floorspace made up 45% of town centre floorspace in active retail use (Graph 36a). This is quite different to commercial centres where convenience floorspace made up only 22% of active retail floorspace. The city centre had the lowest proportion of convenience floorspace – 7%. There was very little change in the proportion of active retail in convenience use in the city centre over the survey period. Within town centres however there was an increase from 28% in 1986 to 45%. There was also a sizeable decrease in the proportion of floorspace in commercial centres which was in convenience use. In 1986, 50% of commercial centre retail floorspace was in convenience use compared with 22% in 2010.

10.12 Within the city, 21% of convenience floorspace was located in the commercial centres, 26% in town centres and 6% in the city centre. These proportions were relatively unchanged in the survey period with the exception of commercial centres which increased their share from 11% in 1986.

10.13 The number of convenience units has fallen in the city centre, town centres and commercial centres. The greatest fall has been in town centres where there were 42% fewer convenience units in 2010 than in 1986. The total number of retail units in the city centre and town centres also fell in this time, however the number in commercial centres increased. 28% of retail units in town centres were in convenience use compared with 10% in the commercial centres and 14% in the city centre (Graph 36b). Therefore In terms of units and floorspace town centres are the most convenience oriented.

10.14 The number of comparison units fell within the city centre and town centres. The number of comparison units within commercial centres increased. This is very much a result of the expansion of the commercial centres rather than a shift in existing units from convenience to comparison. There were increases in comparison floorspace in the city centre and commercial centres. The comparison floorspace of the town centres reduced. 37% of the city's comparison floorspace was located within the city centre, commercial centres contained 33% of the floorspace. Commercial centres have had an increase in proportion of active retail units and floorspace in comparison use (Graph 37a & b). Within town centres the proportion of active retail floorspace in comparison use has fallen.

10.15 Commercial centres had the lowest percentage of total units in non-retail use (Graph 38a). The city centre and town centres have approximately half of their units in non-retail use. The proportion has increased for both types of centre since 1986. Within commercial centres the proportion is much lower – 25% and this has fallen overall since 1986. In terms of floorspace 40% of town centre space is in non-retail use, 30% of the city centre and only 9% of commercial centres (Graph 38b).

10.16 Vacancy rates in the city centre and commercial centres at 2010 were 7%, town centres 10% (Graph 39a). In terms of floorspace rates were also highest in town centres (Graph 39b). 31% of the city's vacant units were located in town centres, 13% in the city centre and 4% in the commercial centres. To a large degree this is indicative of the number of units in these centres as a whole.

10.17 Town centres had the smallest average size of units - 137 sq m gross. The city centre average was 254 sq m gross and commercial centres were 760 sq m gross. The average size of units in commercial centres increased steadily and has more than doubled since 1986. In the city centre and town centre the change was more sporadic and at a much smaller scale.

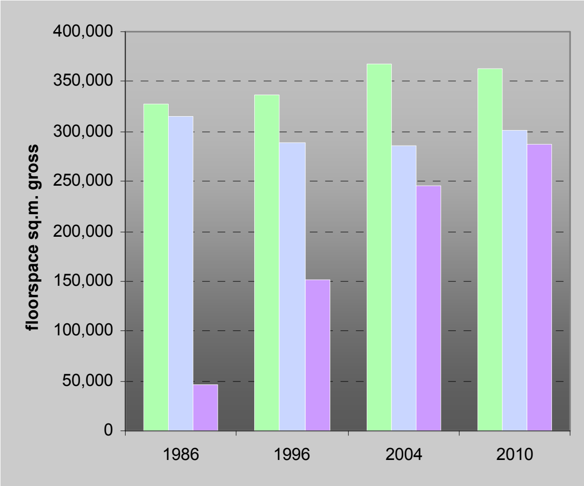
10.18 Town centres and the city centre continue to be the location for the majority of the city's shop units and floorspace. The greatest change in floorspace occurred in commercial centres. At the start of the survey there were fewer of these centres and over the years both new centres and expansion of existing centres has increased the floorspace significantly. The city centre retains the largest share of comparison floorspace however over the survey period this has been reducing as commercial centres take up an increasing share of both total floorspace and comparison floorspace.

Graphs - Town Centres v Commercial Centres
(see also Appendix 4, Tables 1-12 and 20-22)

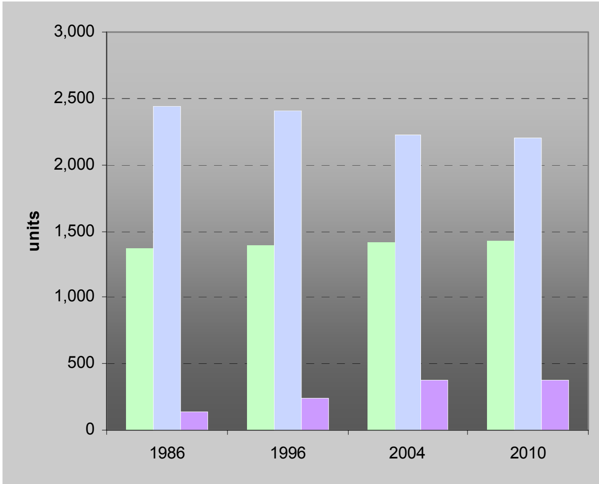
All shop units

City centre Town centres Commercial centres

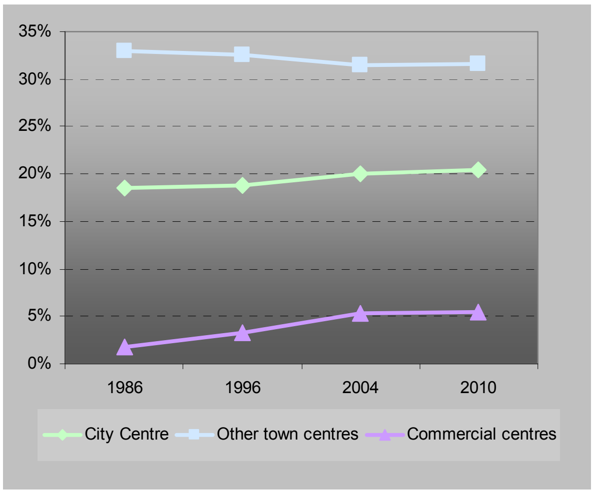
Graph 31a) Floorspace 1986-2010



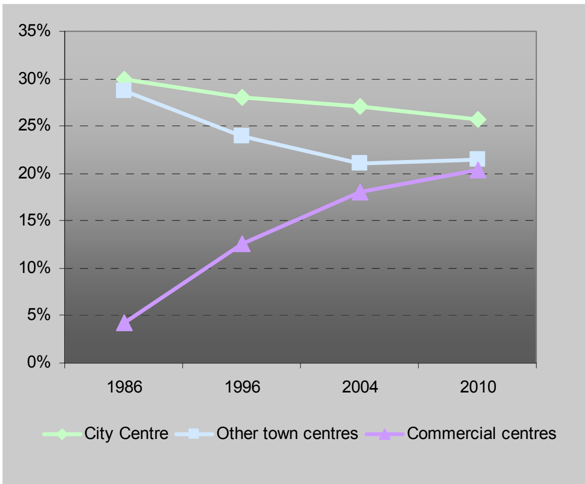
Graph 31b) Units 1986-2010



Graph 32a) Proportion of city's units located within town centres/commercial centres

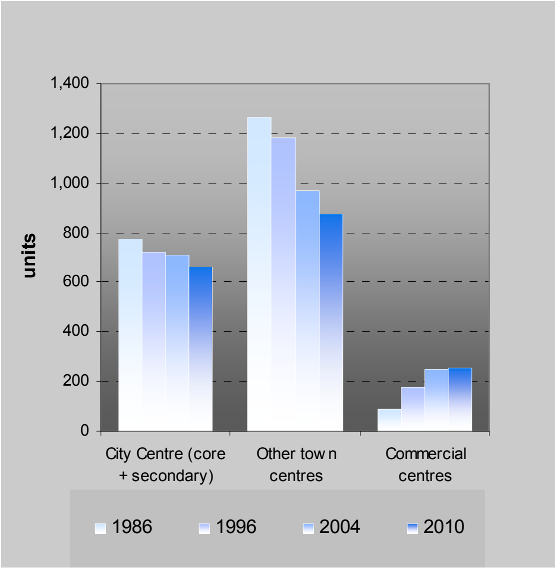


Graph 32b) Proportion of city's floorspace located in town centres/commercial centres

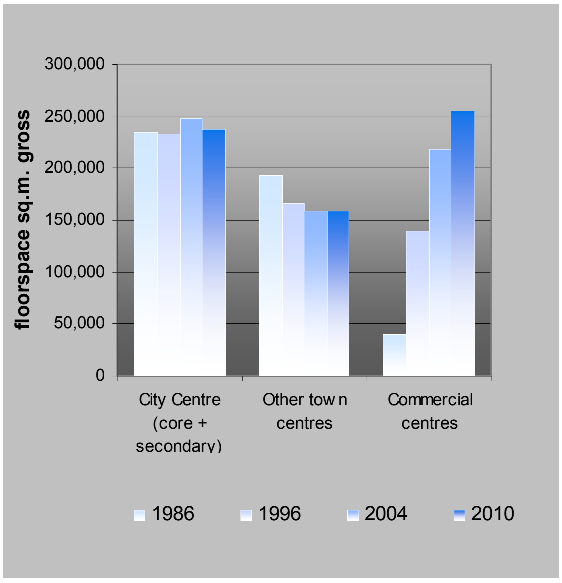


Active retail units

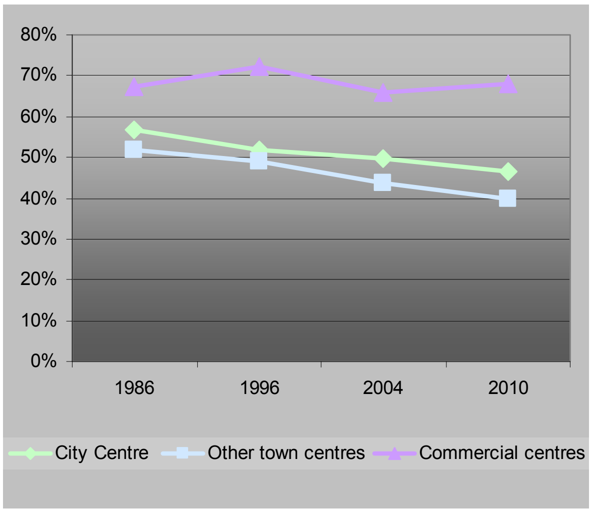
Graph 33a) Trends in active retail units



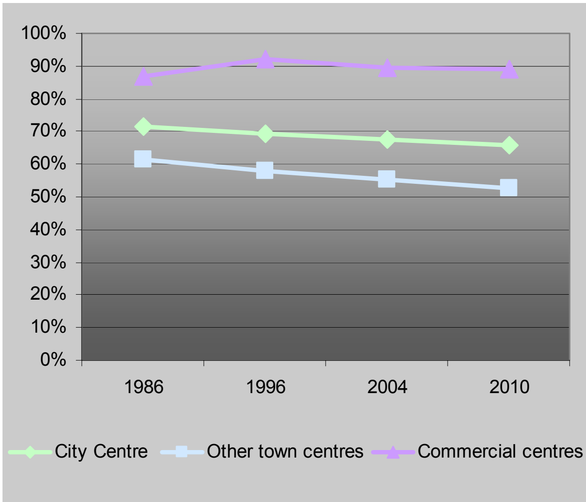
Graph 33b) Trends in active retail floorspace



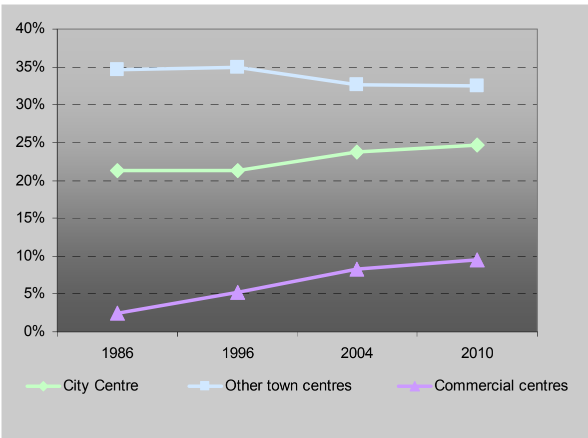
Graph 34a) % of units in active retail use



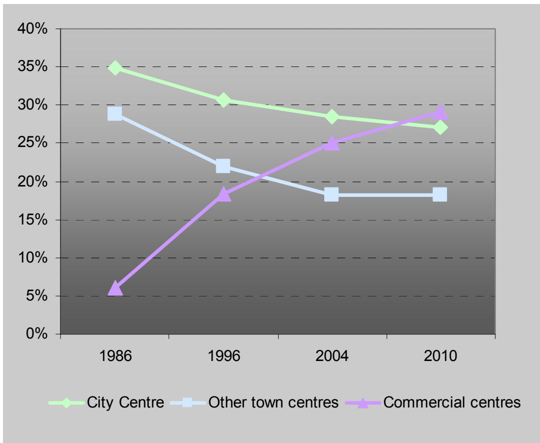
Graph 34b) % of floor space in active retail use



Graph 35a) % of city's active retail units

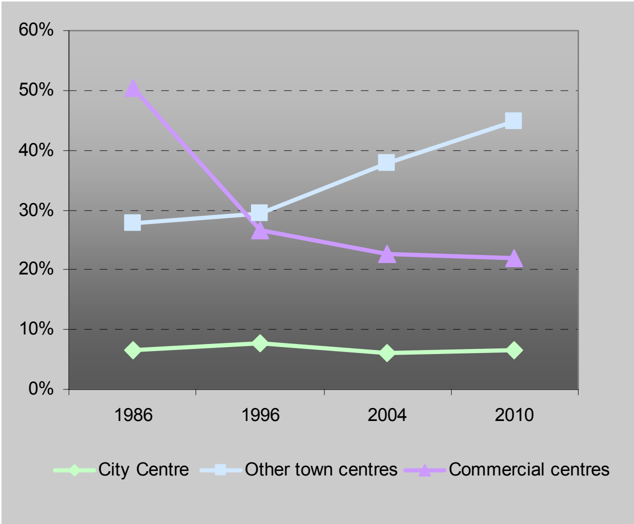


Graph 35b) % of city's active retail floorspace

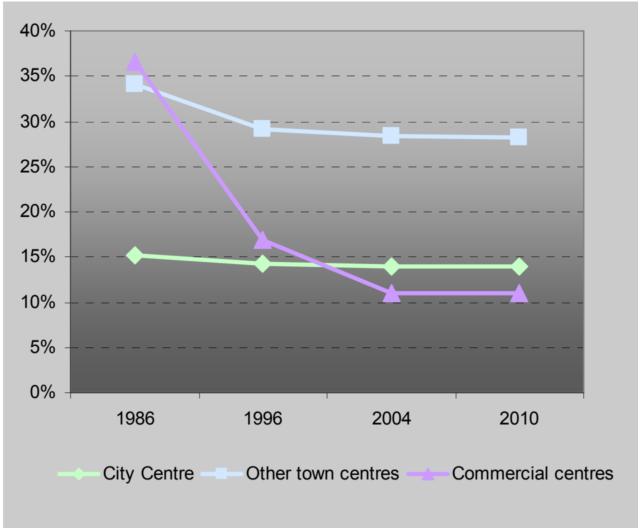


Convenience units

Graph 36a) Proportion of active retail floorspace convenience use

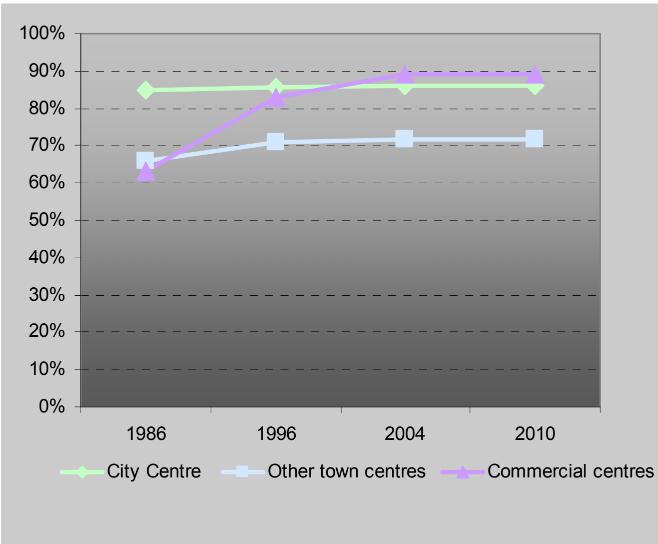


Graph 36b) Proportion of active retail units in in convenience use

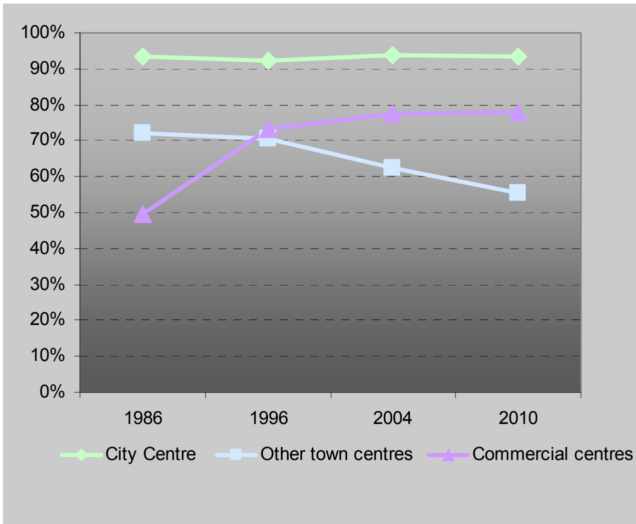


Comparison units

Graph 37a) Proportion of active retail units in comparison use

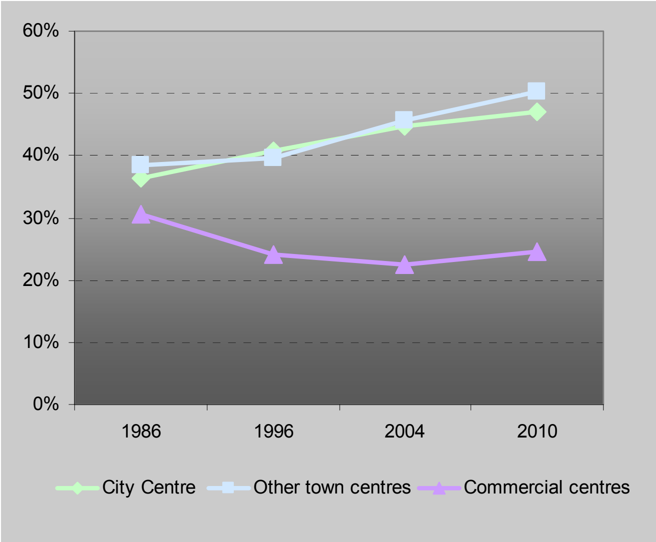


Graph 37b) Proportion of active retail floorspace in comparison use

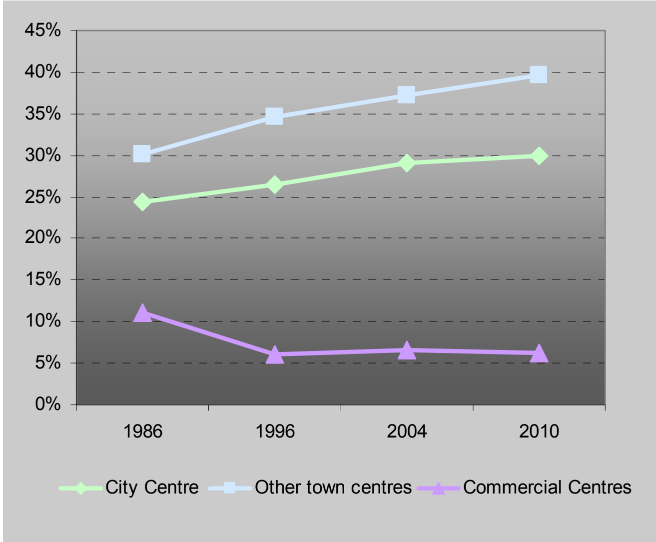


Non-retail units

Graph 38a) % of units non-retail services

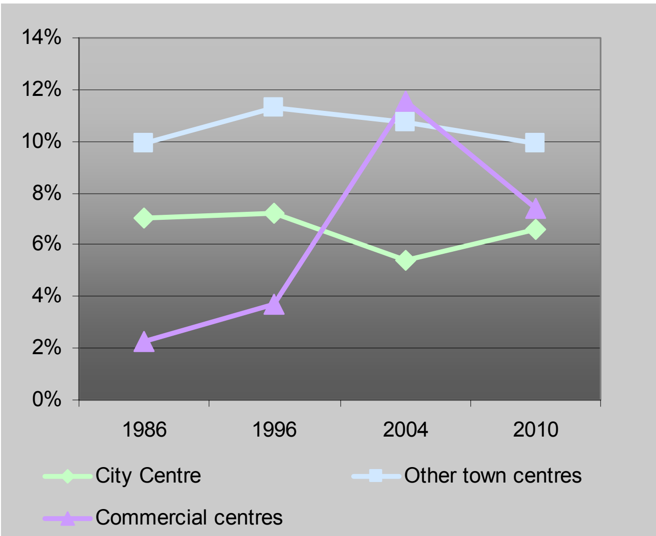


Graph 38b) % of floorspace non-retail services

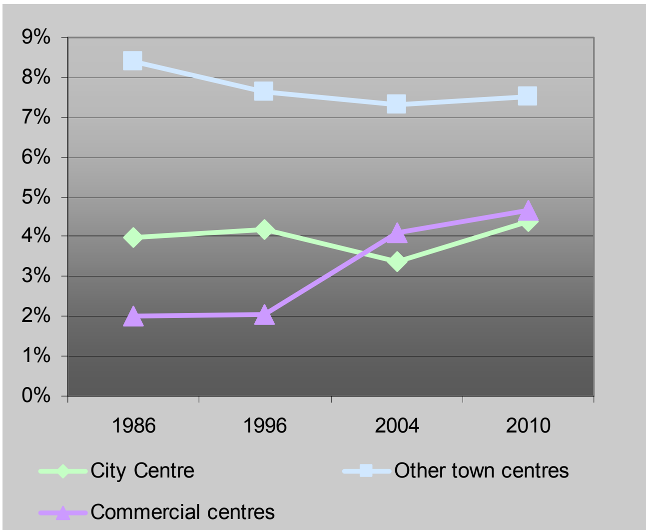


Vacancy rate

Graph 39a) vacancy rates (units)



Graph 39b) Vacancy rates (floorspace)



11.0 Change in local centres

- Local centres have collectively, suffered a decline and a change in their role over the last 25 years, partly due to increasing mobility, changing lifestyles and rising consumer expectations.
- Account for just 8% of Edinburgh's floorspace in active retail use, compared with 11% in 1986
- Increasingly devoted to service activities, which at 2010 accounted for 5% of all shop units.
- Proportion of units and floor space devoted to the sale of retail goods 9both convenience and comparison) has diminished.
- The total number of shops in active retail use has fallen by nearly 40% over the last 25 years.

11.1 Local centres in Edinburgh vary in size. The survey identifies 28 local centres. This is fewer than designated in the Edinburgh City Local Plan, as the survey centres were originally categorised in 1986 and the original definitions have been retained to maintain consistency in time series analysis. Some centres are anchored by supermarkets and provide a range of shopping, others provide only a basic level of convenience shopping. Centres range in size from 1 unit to 69 units. The average is 43 units and the median is 29. Floorspace of local centres varied from 432 sq m to 17,364 sq m. 17% of the city's shop units and 11% of the city's floorspace was located in local centres. Vacant units accounted for 11% of local centre units and 11% of floorspace.

11.2 There has been a degree of change in the provision of shop units in local centres over the survey period (Graph 40). Some units have been lost from shop use, mainly due to residential conversions. The overall number of units in local centres fell by 8% (Graph 41). Compared with a city wide reduction of 6%.

11.3 The number of units in active retail use fell by a much greater proportion than total units. They fell 40% from 620 to 377, therefore as well as losing units altogether from shop use the number of units actually selling goods rather than providing services has fallen dramatically. This is likely to have had an effect on the vitality of some centres where there is very little basic shopping provision and local people bypass the centre to use larger centres and stand alone stores. City wide there has also been a fall in the number of active retail units although to a much smaller degree of 26%.

11.4 There was a total floorspace of 156,960 sq m gross in local centres as at 2010. This was an increase of 7.5% since 1986 (Graph 42). Citywide there was a 29% increase in floorspace. Although total floorspace increased, the rate of growth was below that of the city as a whole and the composition of this floorspace needs to be considered alongside a fall in units which impacts upon the variety of retail offer within these centres. The proportion of the city's floorspace located in local centres fell over the period from 13% to 11% (Graph 44). Some other levels of the network therefore experienced larger increases in shop floorspace.

11.5 Along with the fall in the number of units in active retail use there was a corresponding fall in the amount of floorspace in active retail use from 76,178 sq m to 71,785 sq (Graph 43b). This is a fall of almost 6% in contrast with a rise of 30% citywide. This demonstrates that local centres are becoming more service orientated than other centres.

11.6 There were 163 units in convenience use in local centres at 2010. This is a fall of 48% since 1986 (Graph 41). City wide the fall has been 43%. There was a similar fall in the number of comparison units although this was at a much higher rate than experienced citywide. There were 30% fewer comparison units in local centres, city wide there was a 15% fall. Comparison units add variety to local centres however convenience is the mainstay of most of these centres. The fall in convenience units in these centres reflects the picture at citywide level therefore is not unique to local centres however their role in providing accessible shopping to local people heightens the importance of retaining a convenience function within them.

Broughton St.

11.7 The 2010 survey found a total convenience floorspace of 49,351 sq m in local centres (Graph 45b). Convenience floorspace of local centres increased between 1986 and 2004 and fell by 7,041 (12%) in 2010. This is in part due to the closure of a supermarket at Dumbryden, however this only accounts for 2,500 sq m gross. The amount of convenience floorspace at 2010 was still above that of 1986. The trend in convenience floorspace citywide was quite different. Convenience floorspace citywide increased by 45%, local centres had only a marginal increase of 0.7%. This indicates a change in the balance of convenience floorspace away from local centres. In 1986, 28% of the city's convenience floorspace was located in local centres. At 2010 this had fallen to 18%.

11.8 Total comparison floorspace in local centres fell 17% to 22,434 sq m (Graph 45b). Only 14% of local centre floorspace is in comparison use. This fell from 19% in 1986. The proportion of floorspace in comparison use at citywide level remained relatively unchanged at 43%, although the actual amount of comparison floorspace increased by a quarter. Only 4% of the city's comparison floorspace was located in local centres, this fell from 6% in 1986. The local centres have therefore lost comparison floorspace compared with the citywide trend of increased comparison floorspace and are losing their citywide share of this type of retail.

11.9 Average floorspace of local centre units increased from 111 to 130 sq m (17%). Citywide units increased by 36% to 202 sq m gross.

11.10 At 2010 there were 138 vacant units in local centres (Graph 45a). This represents 11% of the total units in local centres. This is similar to the citywide vacancy rate of 10%. There was a slight increase in the proportion of units which were vacant from 9% in 1986. The number of vacant units at each survey year varied only slightly between 121 and 138 units. Vacant floorspace on the other hand increased by more than 40% between 1986 and 2010 (Graph 45b). At 2010, 16,603 sq m of floorspace was vacant. This represented 11% of floorspace in local centres. City wide vacant floorspace accounted for 7% of total floorspace. This must be viewed in the context of an increase in overall floorspace of 7.5% in local centres. However it is clear that the amount of vacant floorspace has grown above that of the additional floorspace.

Comiston Rd.

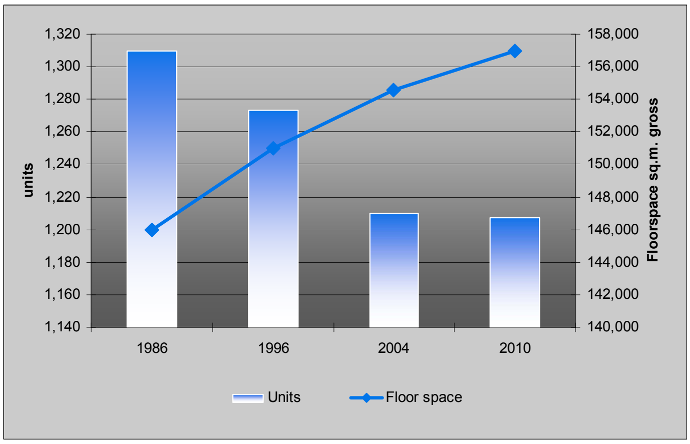
11.11 Local centres have evolved over the survey period from retail dominated centres towards more service oriented centres. Convenience continues to be the dominant type of retail. Centres have been gradually reducing in terms of number of units. Local centres to an extent reflect the trends citywide in terms of loss of total units and units in active retail use. The floorspace within local centres has not increased at the same rate as the city centre resulting in a diminished share of the Edinburgh's floorspace.

Graphs - Change in local centres

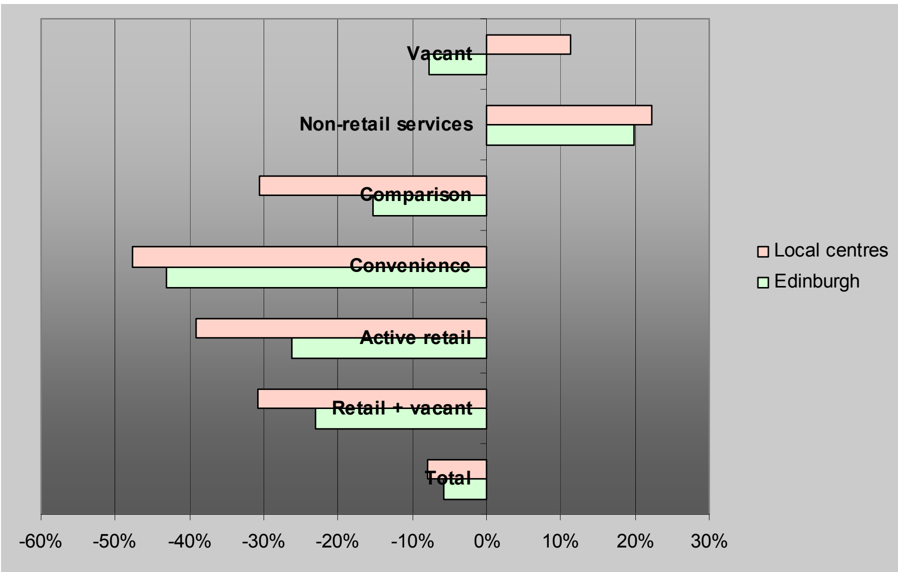
(See also Appendix 4, Tables 1-12 and 20-22)

All shop units

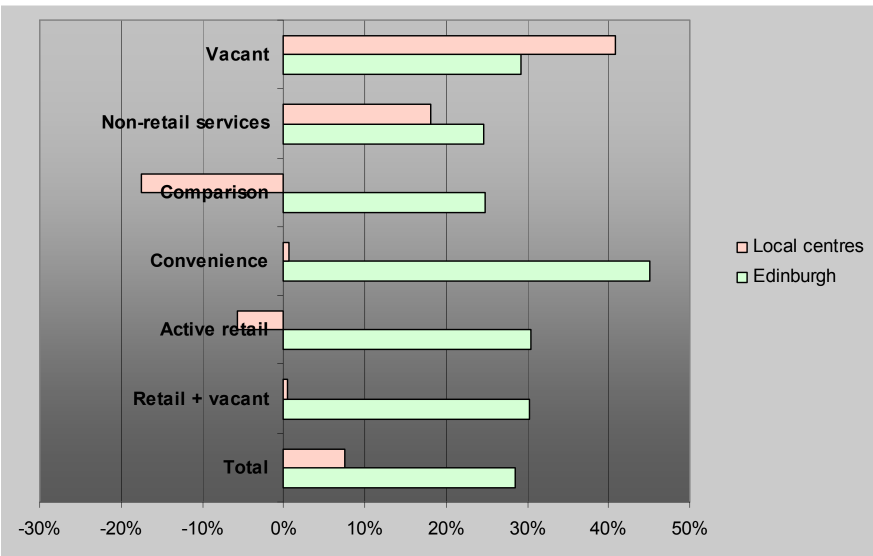
Graph 40 - Floorspace and units of local centres



Graph 41 - %Change in units 1986-2010

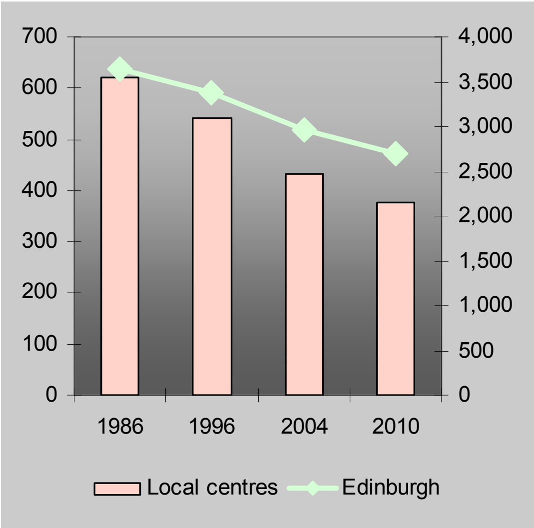


Graph 42 - % Change in Floorspace 1986-2010

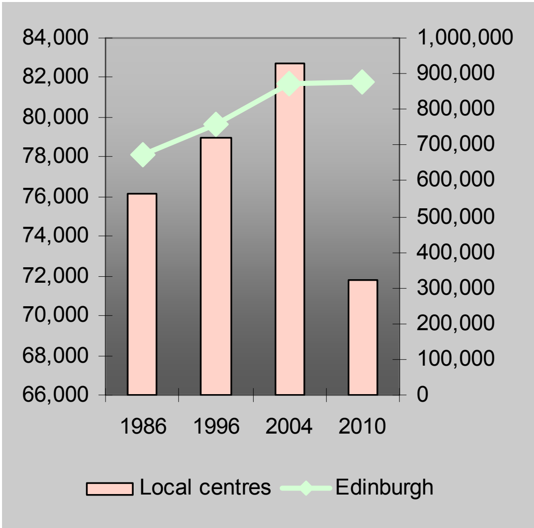


Active retail units

Graph 43a) Units in active retail use

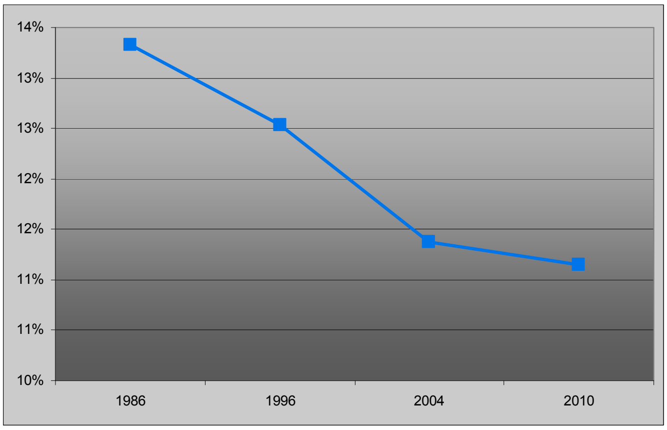


Graph 43b) Floorspace in active retail use



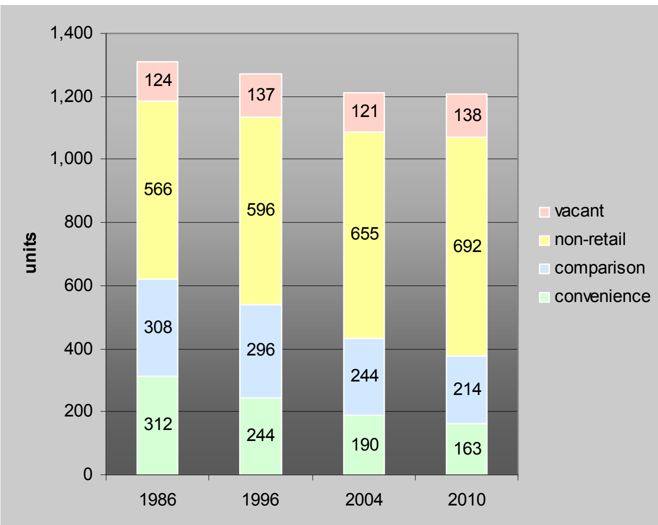
Total floorspace

Graph 44 Proportion of city's floorspace in local centres

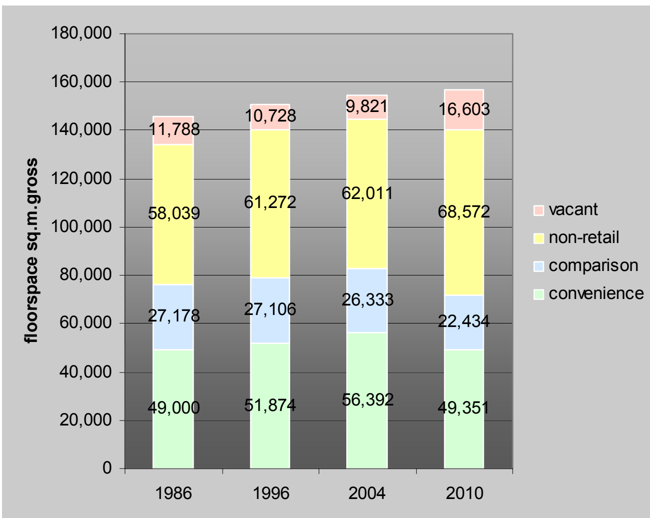


All units by broad use category

Graph 45a) Number of units by broad use category



Graph 45b) Floorspace by broad usage category



12.0 Neighbourhood Shop Groups

- Large fall in number of units and floorspace
- shift towards predominance of non-retail services
- steady vacancy rates, significantly higher than the city average
- most changed group within network
- To an even greater extent than local centres, neighbourhood shop groups have generally seen a decline over the last 25 years, with remaining shops having to adapt to new uses.
- The same factor impacting on local centres have been at work including greater mobility and other changes in lifestyle.
-

12.1 Neighbourhood shop groups (NSGs) are very small groupings of shops which generally serve just a few surrounding streets. 146 neighbourhood shop groups were surveyed. Groups vary in size from 1-37 units with floorspace of 13 sq m - 3,852 sq m gross. In the course of the survey period 5 of these groups have lost their shop use entirely. 4 instances are due to large scale regeneration of housing areas. The remaining group lost its single unit to residential use.

12.2 Both the number of shop units and the floorspace of NSGs have fallen over the survey period (Graph 46). Units have fallen by 22% and floorspace by 37%.

12.3 At the beginning of the survey period neighbourhood shop groups were predominantly retail locations with 59% of units either in retail use or vacant (Graph 47). Over the course of the survey period the composition has shifted markedly towards non-retail. The number of shop units in retail use or vacant fell by 44% and the number of non-retail service units increased by 10% (Graph 48). Service units made up 58% of all units in 2010. The balance of floorspace has also shifted. Floorspace of service units made up 50% of total floorspace in 2010 compared with 43% in 1986.

12.4 A larger proportion of NSG floorspace and units are in convenience use than comparison use (Graph 49). While both the proportion of comparison and convenience units in neighbourhood shop groups have fallen, the proportion of convenience units has fallen at a greater rate.

12.5 The actual number of convenience units more than halved in the survey period while the number of comparison units fell by 44%. Convenience and comparison floorspace both fell while non-retail floorspace increased.

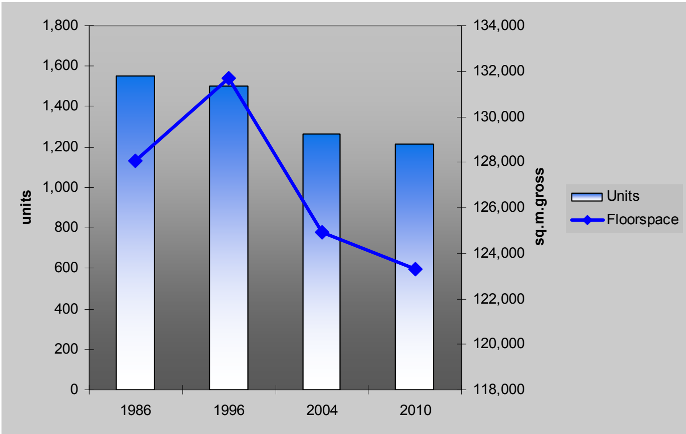
12.6 13% of NSG units and 10% of floorspace were vacant at 2010 (Graph 50). Vacant floorspace remained steady over the survey period while the number of vacant units varied only slightly between 13% and 15%. Vacancy rates within individual neighbourhood shop groups ranged from 0% to 100%. The small number of units in many of these centres has a big impact on the resulting vacancy rate.

12.7 Although some NSGs have fared better than others, on the whole there has been a trend towards a decrease in the provision of shopping that these groups offer to their local neighbourhoods. The loss of some of these groups from shop use altogether reinforces this. It is perhaps a general reflection of the changes in shopping habits and the effect of competition particularly within the convenience sector as well as car ownership. It is neighbourhood shop groups that have lost the greatest proportion of their units of all the levels of the shopping network and along with other town centres the greatest proportionate loss of floorspace. The same is true of convenience floorspace and units. Comparison units have also fallen by 45% which is well in excess of the rate of fall in any other level of the network. It could therefore be said that the neighbourhood shop groups are the most affected level of the network in terms of change away from retail and in particular convenience retailing. As well as losing more units to non-retail use neighbourhood shop groups have lost more units altogether through conversion to housing or redevelopment. Many of these groups may be on the verge of losing their retail function altogether if these trends continue.

Graphs- Neighbourhood Shop Groups
(see also Appendix 4, Tables 1-12 and 23)

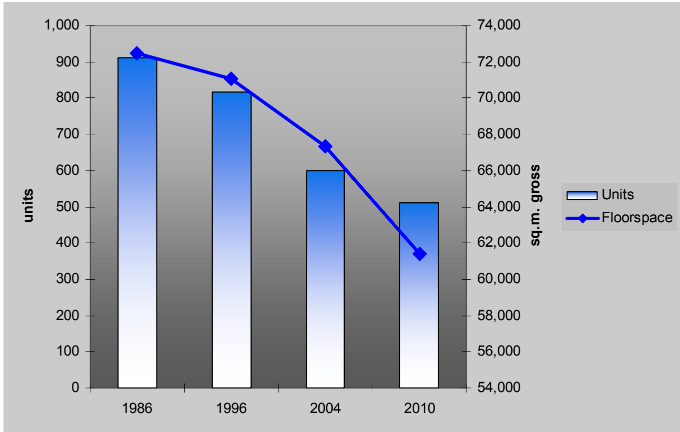
All shop units

Graph 46 - Units and floorspace 1986-2010



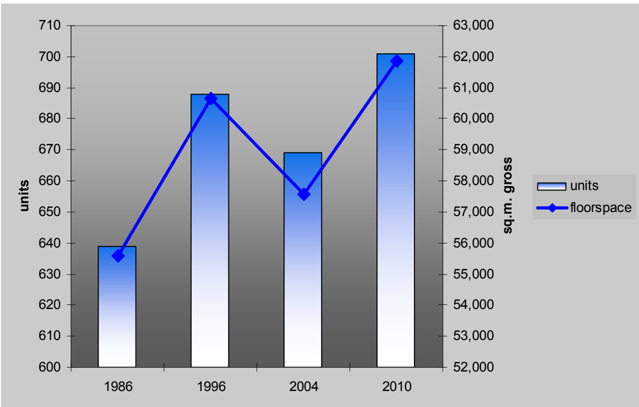
Units in retail use orvacant

Graph 47 - Units and floorspace in retail use or vacant



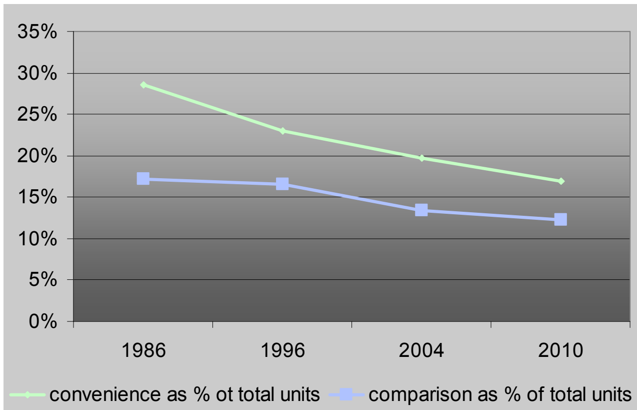
Units in non-retail use

Graph 48 - Units and floorspace in non-retail use



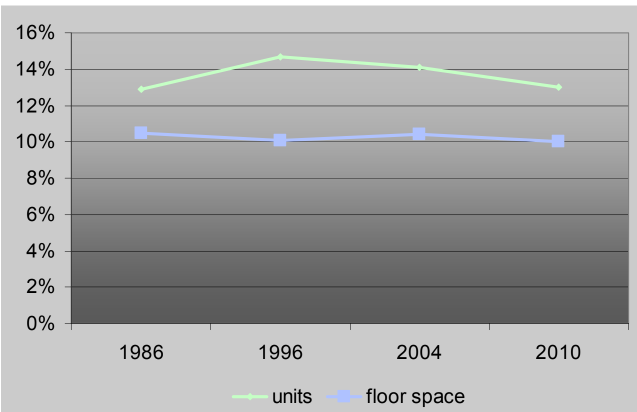
Convenience & comparison units

Graph 49 - Convenience + comparison units as % of total units



Vacancy rates

Graph 50 - Vacancy rates



13.0 Food stores

- falling number of units; increasing floorspace; average size of supermarkets has been growing.
- supermarket operators are now also moving into smaller format stores
- loss of specialist food retailers
- Approximately 60% of all floor space deveoted to food retailing in Edinburgh is controlled by six major supermarket operators.
- There are now 12 supermarkets in Edinburgh with a floor space of 5,000 sq m or more, compared with 8 in 2004 and 6 in 1996.

13.1 Food shopping comprises by far the largest element of convenience shopping described in other sections of this report.

13.2 Food stores provide an important local function to meet the everyday needs of local communities. Food shopping needs (convenience) are met mainly by supermarkets and a large number of town and local centres. Convenience shopping provides the anchor of many local centres. Food purchasing habits have changed radically over the period of the survey with small independent shops disappearing along with an increasing trend to one stop food shopping. At national level there is an increasing number of multiple owned foodstores within town centres. Many of these trends are reflected in the findings of the Edinburgh survey.

13.3 The number of convenience units in Edinburgh has been falling while the floorspace has been increasing reflecting the trend towards larger supermarket formats (Graph 51). There was a 43% reduction in convenience units in Edinburgh between 1986 and 2010 in contrast to a 45% increase in floorspace. At almost all levels of the shopping network this has been the trend. However, the exception is the small neighbourhood shop group, where the floorspace has gone down as well as the number of units. Isolated shops have seen a 465% increase in the amount of convenience floorspace within them. This group includes a number of freestanding supermarkets. Commercial centres also experienced an increase in convenience floorspace (173%).

13.4 The main contributing factor to the increase in convenience floorspace is the rise in number and size of supermarkets. For the purpose of the survey supermarkets are defined as food stores with a floorspace above 1,000 sq m gross. Supermarkets make up only 5% of convenience units yet 57% of the city's convenience floorspace is concentrated within supermarkets. The number of supermarkets within Edinburgh has increased. At 2010 there were 42 supermarkets in Edinburgh compared with 13 in 1986. As well as increasing in number, many supermarkets in Edinburgh have extended in recent years. The average size of supermarkets has increased by

Western Harbour

48% to 3,751 sq.m gross in 2010 (Graph 52). Supermarkets often provide a range of non-food goods and some have increased their retail offer by extending their floorspace, including by means of installing mezzanine floorspace. There are now 12 supermarkets within Edinburgh which are larger than 5,000 sq.m gross. Average floorspace of convenience units in general has risen from130 sq.m to 332 sq.m. gross in 2010 (Graph 53).

13.5 After discounting sales space devoted to non-food, the 2010 survey results enable a very broad estimate to be made of the dominance of the major supermarket operators in terms of food retailing. These indicate that some 60% of all the floor space devoted to food sales in Ediburgh is controlled by six major national operators: Tesco (approx 13%), Sainsbury (135), Morrisons (13%), Scotmid (9%), Asda (9%) and Marks and Spencer (5%). Given the relatively high turnover of these larger businesses their market share in turnover terms is likely to be substantially higher than their share of floorspace.

13.6 Convenience units are distributed across the shopping network (Graph 54). 41% of units were within town centres (including the city centre), 3% in commercial centres, 20% in local centres, 25% within neighbourhood shop groups and 10% within isolated shops.

13.7 The distribution of floorspace presents a slightly different picture across the city (Graph 55). While 41% of convenience units were within town or local centres, only 32% of floorspace was located within these centres. Commercial centres had the most disproportionate amount of floorspace to units. 3% of units were located within those centres and 21% of convenience floorspace.

Distribution of convenience floorspace and units

	Units	Floor space
	% by level in network	
Town centres (incl. city centre)	41	32
Commercial centres	3	21
Local shopping centres	20	18
Neighbourhood shopping groups	25	11
Isolated shops	10	18

13.8 The distribution of convenience floorspace between the levels of the shopping network has shifted in the period 1986 to 2010. Isolated shops and commercial centres have taken an increased share as neighbourhood shop groups, local centres and to a much smaller extent town centres have reduced. The change in the distribution of convenience units across the shopping network has not been as marked as floorspace. There was a small shift in the proportion of the city's convenience units towards isolated shops, town centres and commercial centres.

13.9 The shift in the distribution of food stores towards commercial centres and free-standing locations may appear at odds with national and local priorities which seek to focus provision in town centres. However, policies do generally allow new provision to serve areas where there is a dearth of current food shopping or significant population growth.

13.10 Reflecting the fall in the number of convenience units the number of specialist food retailers has declined in Edinburgh (Graph 56). The number of fishmongers, greengrocers and bakers fell considerably. The most dramatic fall has been in the number of butchers. There were only 26 butchers in 2010 compared with 163 in 1986.

Grocer, Broughton St.

13.11 The number of small general foodstores had been falling until 2004. At 2010 there was an increase in the number of these stores. This is partly a reflection of the current trend of large supermarket operators opening small format stores across the city.

13.12 24% of town centre floorspace is in convenience retail use. Within individual town centres the amount of convenience floorspace varies from 12% to 40%. Gorgie/Dalry has the highest proportion of floorspace in convenience use of all town centres (40%) and the highest proportion of units in convenience use. At the other end of the spectrum only 12% of the floorspace of Tollcross is in convenience use. There has been a mixture of losses and gains in convenience floorspace within town centres over the period. Nicolson Street, Portobello and Stockbridge have lost convenience floorspace while the other town centres have gained convenience floorspace. Corstorphine and Gorgie/Dalry both experienced an increase in convenience floorspace of more than 100% - 120% and 160%. Both centres have had supermarkets completed in this time. Note that the town centre boundaries used for the survey do not always accord exactly with boundaries adopted in the current local plan. Some supermarkets recorded as town centre sites in the survey are regarded as edge of centre in planning policy terms.

13.13 Commercial centres vary widely in the proportion of convenience floorspace which they contain. Ocean Terminal has the least at 7% while Cameron Toll has 49% of its floorspace in convenience use. Meadowbank and Wester Hailes also have high levels of convenience floorspace - 31% and 28%. Within the commercial centres Craigleith increased its floorspace by more than 800%. The centre was not fully established at the time of the 1986 survey which partly accounts for the large increase in floorspace although Sainsbury have recently completed an extension to their unit there which has made a significant contribution.

13.14 Convenience floorspace made up 31% of local centre floorspace. Within individual local centres the proportion of convenience floorspace varies greatly from 0% to 88%. This is a reflection of the variation between local centres. Some local centres, such as Chesser, being anchored by a supermarket and others which are more traditional in form made up of smaller units.

13.15 Neighbourhood shop groups had 24% of floorspace in convenience use. Similarly to the local centres the neighbourhood shop groups varied in the number of units which they had and the breakdown of retail uses. Some of the neighbourhood shop groups had no convenience floorspace at all while others were purely convenience centres.

13.16 The operators of convenience retailing in the city are increasingly national multiples. Scotmid have the highest number of units across the city with 39 outlets. Greggs bakers have 27 units, Tesco have 17 units. 7 of theses units are Express and 4 Metro. All 7 Express units are new since the 2004 survey. Some have replaced other convenience operators while some are new convenience units. Sainsbury had 11 units. Since the 2004 survey Sainsbury have opened 4 of their 5 Sainsbury Local stores. Costcutter and Premier also had high representation across the city with 17 and 16 units.

13.14 There has been expansion by the large supermarket operators in recent years. Since the 2004 survey Tesco has opened an additional 10 units, and Sainsbury an additional 5 units. The trend towards supermarket operators opening smaller format stores to complement their larger superstores has continued apace, with more stores opened or in the pipeline even since the 2010 survey. Morrisons had only a single unit in 2004 but following the take over of Safeway stores and a new store at Granton this increased to 6 in 2010.

West Port

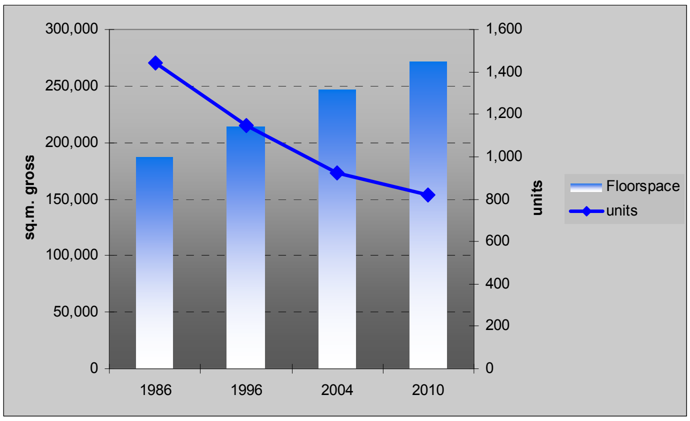
13.17 The largest 4 supermarket operators have 50% of the convenience floorspace in the city. Tesco have the greatest amount of floorspace in the city, followed by Sainsbury, Morrisons and Asda. Map 3 of Appendix 2 shows that there is a widespread distribution of large food stores across the city. There is continuing pressure for food retail in Edinburgh with proposals coming forward at a number of locations. A recent report by marketing consultancy CACI highlights Edinburgh as being in the top 10 postcode areas in the UK in terms of supermarket floorspace per head of population.

13.18 The floorspace of food stores in the survey includes an element of non-food provision. In some cases at quite high levels. Supermarkets are increasingly taking up non-food ranges. Some are also now developing stand alone non-food stores. In the UK large grocers share of the non-food market grew from 8.4% to 13.5% between 2003 and 2009. (NEF-Re-imaging the High Street 2010).

Graphs - Food stores

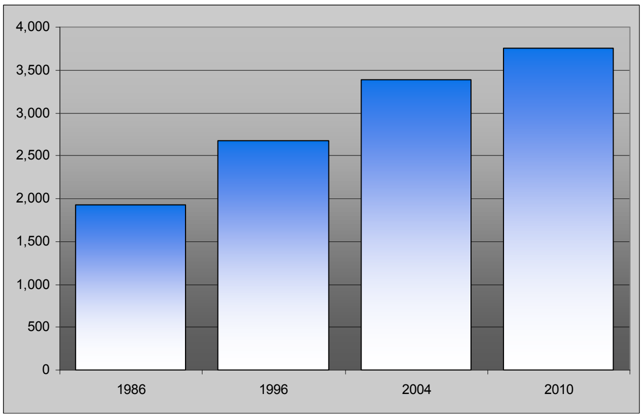
Convenience units

Graph 51 - Floorspace and units in convenience use



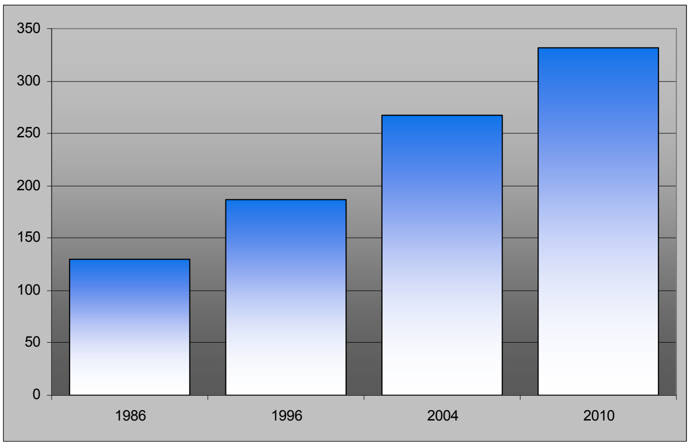
Supermarkets (above 1,000 sq m gross)

Graph 52 - Average floorspace of supermarkets (sq m gross)



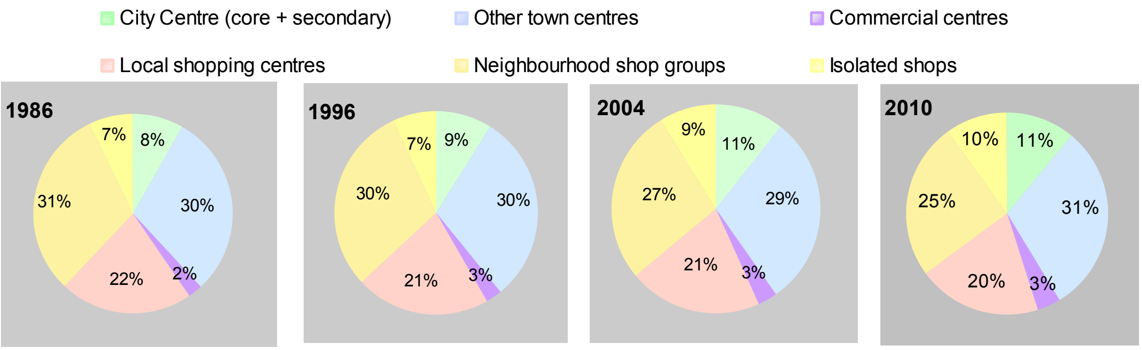
Convenience floorspace

Graph 53 - Average floorspace of convenience units

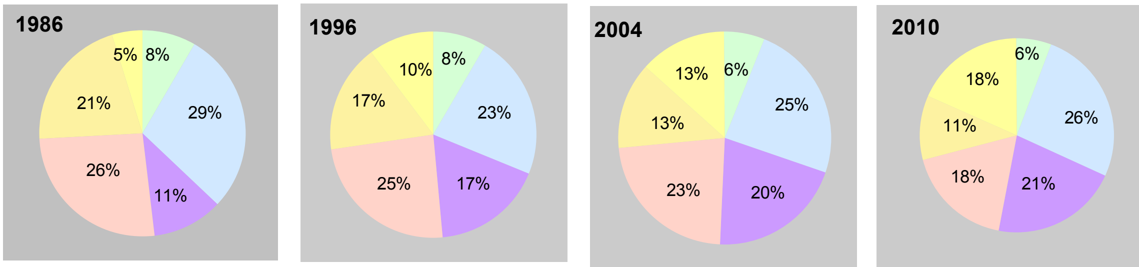


Distribution of convenience units

Graph 54 - Distribution of convenience retail units in shopping network

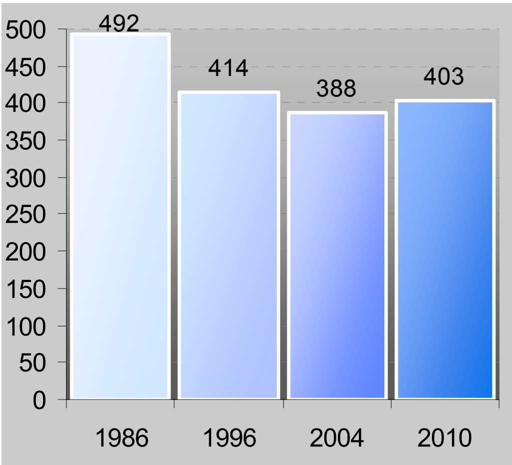


Graph 55 - Distribution of convenience floorspace in shopping network



Small general food stores

Graph 56 - Number of small general food stores in Edinburgh 1986-2010



14.0 Major Occupiers

- 215 major occupiers
- convenience and food sector most predominant occupiers of units
- supermarkets and department stores largest occupiers of floorspace

14.1 Edinburgh has a range of retailers from national multiple department stores to small independent retailers. A number of retailers have multiple representation across the city with numerous branches. The major occupiers in Edinburgh are for the purpose of this analysis defined as those occupiers with at least 3 separate units or 1,000 sq m gross floorspace. There are 215 occupiers that fall within this category. Clothing/footwear stores are the most common type of store within the major occupiers (42 occupiers) (Graph 56). 26 occupiers are convenience/foodstores. Furniture/flooring is also prominent (16 occupiers). 11 of the major occupiers are charity shops

Greggs, South Bridge

14.2 The major occupiers with the greatest number of units are mainly from the convenience and food sector including: Scotmid; Costcutters; Premier; Greggs; Tesco; Starbucks; Costa, Baguette Express; Subway; Pizza Hut; McDonalds; Sainsbury; Shell Select. Betting shops also included: William Hill; Scotbet and Ladbrokes. Chemists also feature: Lloyds Pharmacy; Lindsay & Gilmour and Boots. Despite falling numbers of banks the main players feature in the top of the list of occupiers with more than 10 units across the city: Lloyds TSB; HBoS; and RBS. Arcadia are the only clothing retailer with more than ten units in the city. Mobile phone retailer Carphone Warehouse and newsagent RS McColl are also major occupiers of units.

14.3 In terms of floorspace the supermarkets and departments stores are the largest occupiers. Tesco has the greatest floorspace of any retailer in the city followed by Marks and Spencer. Other supermarkets with more than 10,000 sq m are Asda, Scotmid, Sainsbury's and Morrisons. Department stores: House of Fraser, John Lewis, BHS, House of Fraser, Marks and Spencer are all major occupiers of floorspace in the city. DIY retailer B & Q, Boots chemist and clothing retailers Next and Arcadia also have more than 10,000 sq m of floorspace. Bank of Scotland and RBS also feature as major occupiers of floorspace along with Waterstones/HMV. Although since the time of the survey one of these units has been lost.

Tesco, Corstorphine

.

14.4 Most of the larger floorspace occupiers have multiple units across the city. The major occupiers account for 76% of the city's retail floorspace (including vacant) and 35.6% of the city's units.

14.5 A 2010 report by the New Economic Foundation investigating 'clone towns' indicates that 65% of available shop floorspace in the UK is occupied by multiples (defined as those retailers with 5 or more outlets). Most of the retailers identified in this report as major occupiers in Edinburgh are multiple retailers. Although there may be retailers that have only single units in Edinburgh but multiple locations throughout the UK, most multiples would have a relatively high amount of floorspace therefore there are likely to be relatively few cases of multiples which are not included in the major occupier totals for Edinburgh.

14.6 Research by Colliers in 2010 showed that in the UK the number of in-centre multiple shops in the UK has increased by 18.8% since 1988. (High Street Health Check, Centre Retailing 2011). The presence of multiple retailers is sometimes seen as undesirable putting pressure of competition on small retailers and creating towns centres which are perceived as clones of each other. On the other hand it can be an indicator of an attractive centre that a national multiple desires to be located in a town. National rankings of shopping centres compiled by various retail agencies are often scored on the basis of the number of multiple retailers present in a centre. There is a view that reliance on multiples can have an adverse effect as many leading retailers have fallen into administration and some are withdrawing from smaller centres to consolidate branches.

Major occupiers

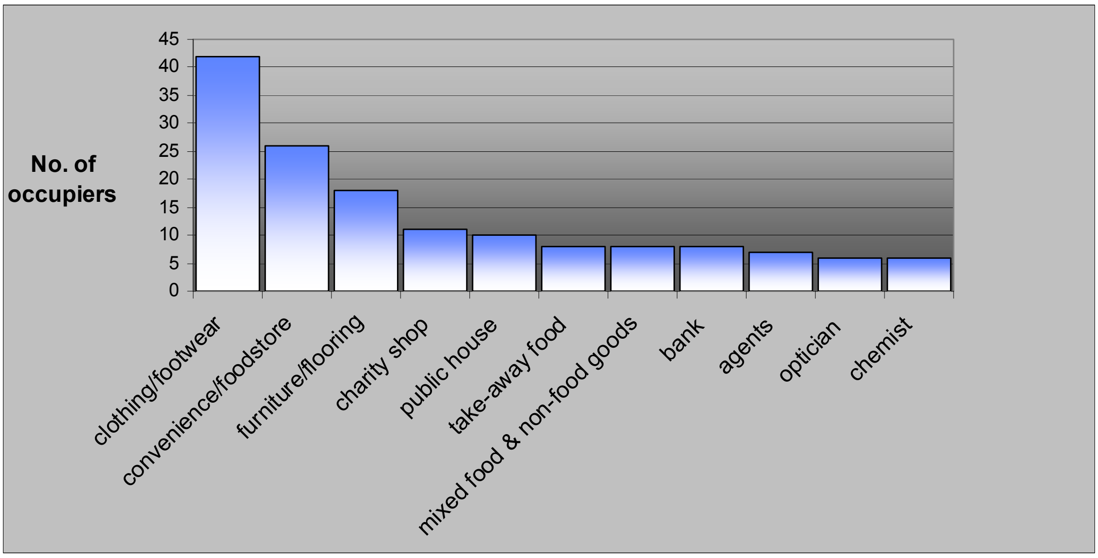
Occupiers with 10 or more units in Edinburgh

RANK	BUSINESS NAME	GOODS CATEGORY	TOTAL NO. OF SHOP UNITS
1	Scotmid (all formats except Semi-Chem)	supermarket	39
2	Bank of Scotland / HBOS	bank	36
3	William Hill	betting shop	36
4	Royal Bank of Scotland	bank	32
5	Ladbrokes	betting shop	31
6	Greggs	baker	27
7	Boots	chemist	24
8	Tesco (all formats incl. Tesco Home)	supermarket	18
9	Costcutter	convenience store	17
10	Starbucks	coffee shop	17
11	McColl / R.S. McColl	newsagent	16
12	Premier (grocers)	convenience store	16
13	Scotbet	betting shop	15
14	Subway	sandwich shop	15
15	Lloyds TSB Scotland	bank	14
16	Pizza Hut	hot food take-away	14
17	Costa Coffee	coffee shop	13
18	Lloyds Pharmacy	chemist	13
19	Baguette Express	sandwich take-away	12
20	Arcadia (Burtons / Top Shop / Dorothy Perkins / Wallis)	clothing	11
21	McDonalds	restaurant & hot food take-away	11
22	Post Office	post office	11
23	Sainsbury's (all formats)	supermarket	11
24	Shell Select Shop	convenience store	11
25	Carphone Warehouse	mobile phones	10
26	HMV / Waterstones	home entertainment / books	10
27	Lindsay & Gilmour	chemist	10
28	Marks & Spencer (all formats)	mixed food & non-food goods	10

Occupiers with 10,000 + sq m gross floorspace in Edinburgh

RANK	BUSINESS NAME	GOODS CATEGORY	TOTAL NO. OF SHOP UNITS
1	Tesco (all formats incl. Tesco Home)	supermarket	18
2	Marks & Spencer (all formats)	mixed food & non-food goods	10
3	Sainsbury's (all formats)	supermarket	11
4	Morrisons	supermarket	8
5	B & Q	diy	4
6	Asda	supermarket	3
7	Scotmid (all formats except Semi-Chem)	supermarket	39
8	House of Fraser (Frasers, Jenners)	mixed non-food goods	2
9	John Lewis	mixed non-food goods	2
10	British Home Stores	mixed non-food goods	3
11	Debenhams	mixed non-food goods	3
12	Jenners (House of Fraser)	mixed non-food goods	3
13	Boots	chemist	24
15	Arcadia (Burtons / Top Shop / Dorothy Perkins / Wallis)	clothing	11

Graph 56 - Number of major occupiers by goods type (more than ten occupiers in category)



15.0 Loss of units from retail use

- 444 units converted or demolished
- largest proportion lost from neighbourhood shop groups
- most common converted use residential

15.1 The survey covers those units which were originally intended for shop use. Over the course of the survey period some of these units have been removed from shop use through conversion to other uses or demolition. The most common conversion is to residential use. This is especially the case in neighbourhood shop groups and local centres. The survey continues to record the use of the premises even once converted. There have been some rare occasions where units which have been converted to other uses have come back into shop use. It cannot therefore be assumed that all units are lost forever from retail use although the likelihood of most of them returning to such use is limited.

15.2 A total of 444 units have been converted to non shop use in the survey period. Some of these units have been demolished and new units have replaced them. An example of this is Bughtlin Market in East Craigs which lost 4 units which have recently been replaced with 3 new units.

East Craigs

15.3 The largest proportion of units which have been lost were located in neighbourhood shop groups (29%) followed by those outwith any centre (21%) and town centres (20%).

15.4 The reason for loss of units varies between the types of centres. Within the city centre a number of units have been converted to offices, for example within St Andrew Square. Residential conversions are most common in neighbourhood shop groups and local centres. Within town centres there have also been a number of conversions to residential use. In some town centres such as Tollcross a number of units have been demolished within areas of redevelopment such as around Lauriston Place and Fountainbridge. Outwith centres units are most commonly converted to residential use. Other uses of units previously in shop use across the city include hotels, industry and leisure. Some sites had been cleared but not redeveloped at the time of survey.

16.0 Emerging uses in retail units

16.1 Since the survey began there have been changes in the types of uses which occupy Edinburgh's shop units. There are some uses which are beginning to emerge which did not previously feature within shop units. Among these uses are:

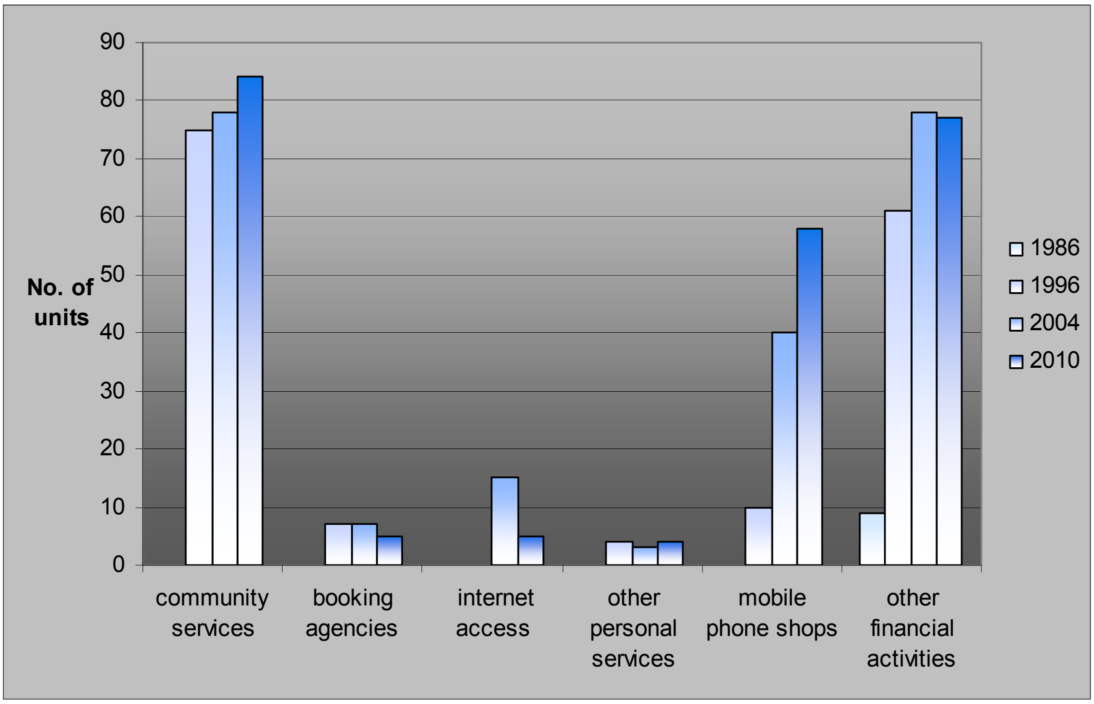
- community services and activities (includes counselling, drug advice, Citizens Advice Bureaus, careers centres, charity offices).
- booking agencies (tour tickets, buses)
- internet access
- other personal services (alternative therapies, ironing services, homecare, ancestral centre)
- mobile phone shops

16.2 None of these uses feature in the 1986 survey. Community services have been a particular growth area. 84 units are now in use for a variety of activities. There are 58 mobile phone shops.

16.3 Other financial activities have also increased dramatically in shop units from 9 units in 1986 to 77 in 2010. This includes general financial services, money lending, and cheque cashing.

Mobile phone shop, Princes St.

Graph 57 - Emerging uses in retail units 1986-2010



References

Re-imaging the High Street: Escape from Clone Town Britain New Economic Foundation, September 2010.

High Street Health Check, Estates Gazette Centre Retailing Supplement 2011.

A Re-assessment of Retail Structure, Autumn 2010, Colliers.

National Retail Barometer, Winter 2010, Colliers

Scottish Town Centres October 2010, GVA Grimley

Annual ProVision Study, October 2010, CACI

Images

City Centre images courtesy of Edinburgh Inspiring Capital www.Edinburgh-inspiringcapital.com