BUSINESS PERFORMANCE REPORT
Christmas & New Year 2019-2020
Business Performance Report
(Christmas & New Year 2019-2020)

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Executive Summary

Belfast City Centre Management oversee the annual Retail Sales and Business Performance survey in January to measure sales and footfall over the Christmas Period. As was in 2019, this year’s survey was extended to include 53 businesses from the Hospitality sector and 101 from retail services, both multiple and independent stores.

Like in previous years, Springboard reported that Footfall declined by -2.5% for December 2019 across the whole of the UK. This was a marginally smaller decrease than the previous year where it was reported that footfall fell by -2.6% for December 2018. Similarly, footfall declined by -2.1% for December 2017 showing a significant trend for footfall decline across the UK for the Christmas period.

Key Findings:

- For November 2019 footfall, 49% of businesses surveyed reported a decrease when compared with the previous year. This averaged out at -5.41% for 2019, which was a significant decline when contrasted against both 2018 and 2017. This percentage was also higher than the UK average which was -4.6% for the month of November.
- This trend was also observed for December where 52% of respondents noted a decrease in their footfall when compared with the previous year. The overall average of -6.68% also showed a significant decline in footfall when compared with the last two years. This is a considerably higher decline than seen in the rest of the UK year on year where footfall only declined by -2.5% for December. In saying that, this trend of footfall decline year on year was not felt across all sectors of retail.
- The hospitality sector reported that 45% of businesses saw an increase in their footfall for November and December when compared with the previous year.
- Sales for November 2019 reported a 41% decrease when compared with the previous year. 40% of respondents reported an increase in their sales for November. The average sales figure for November was -3.45%, which showed a notable decline in sales for November when compared with previous years. For example, this overall average was observed to be -2% for November 2018.
- A similar pattern was observed for December sales where 45% of businesses recorded a decrease in their sales figures compared with December 2018. The overall sales percentage measured as -1.49% for this month which was the first time in two years a minus overall percentage had been observed.
- As with footfall for this year the hospitality sector reported a more positive picture than the retail sector with businesses reporting a high percentage increase in their sales for November and December year on year. This equated to 49% of hospitality businesses reporting an increase for November and 55% of hospitality businesses reporting an increase for December.
- Analysis of business figures and sentiments revealed that Hospitality reported the highest percentage of positive responses for the Christmas period 2019 with 45% of
Hospitality respondents stating they felt their Christmas performance was ‘better’ than expected. This is comparative to the retail sector where 30% of Multiples and 28% of independent businesses reported the same judgement.

- Businesses were given the opportunity to indicate things which they felt would improve their business performance for the next 12 months. 45% of businesses surveyed felt that ‘Marketing’ and ‘Events’ could be more focused to help business. 30% felt that accessibility of city centre was their main concern whilst 19% chose ‘Environmental Improvements’.

- Businesses reported that moving into 2020 their main concerns for the new year would be the decline in footfall observed in 2019, the ongoing drug use and anti-social behaviour in the city centre and parking issues amongst other concerns.
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Introduction

I. **Belfast City Centre Management** conducts the annual Retail Sales Tracker survey\(^1\) with the Business community based in Belfast city centre. The survey is carried out in January to measure the performance of sales and footfall within the retail and hospitality sector over the Christmas period. Collating this data allows us to accurately assess and measure retail performance while also gauging business attitudes and performance for this time period. The survey also allows for the business community to voice their views on issues that affect the trading environment.

II. This year the survey was condensed to maximise business responses compared to the Christmas period of 2018 where the survey was not only produced to attain business sales and footfall figures but also tailored to gain insight into business attitudes following the aftermath of the Bank Buildings fire. The survey for 2019/2020 was concentrated on footfall and sales figures and gaining insight on respondent’s feelings towards their individual business performance for 2020 and how they could be aided to help improve their business performance for the next 12 months.

III. A total of 154 businesses\(^2\) located within the BCCM geographical area\(^3\) of Belfast City Centre participated in the survey. This comprised of 61 multiple, 40 independent and 53 hospitality businesses. Due to the nature of the commercially sensitive information collected and provided, we do not identify the performance of individual businesses. Therefore the figures presented throughout this report are in amalgamated form, broken down by multiple or independent and by sector.

IV. According to Springboard’s December 2019 Footfall Review\(^4\) for the United Kingdom, footfall declined annually by -2.5% compared with -2.6% for December 2018. This was anticipated as footfall has seen a decline in December for the past 9 years with 2009 being the only year where there was an increase in footfall. This result, although not surprising, is disappointing as December footfall included the figures for Black Friday, which fell on Friday 29\(^{th}\) November, and seen a +3.3% increase in footfall for this particular week.

V. Belfast One’s Springboard report illustrated that footfall in December for Belfast, just like the rest of the UK, saw a decline on the previous year, but the percentage difference was much higher than the UK average. Footfall was -6.4% for December

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\(^1\) Please see Appendix One for Survey issued to Businesses  
\(^2\) Please see Appendix Two for List of Businesses Surveyed  
\(^3\) Please see Appendix Three for Map of BCCM Geographical Area  
\(^4\) Please see Appendix Four for Spring Board 2019 Christmas Footfall Review
within Belfast City Centre compared with the previous year, with Monday 23rd December being the busiest day in the month. This higher percentage drop, compared with the UK, may be due to the fact Translink reported a decrease across all their services in Northern Ireland for the 7 week Christmas period when compared with 2018. Additionally, airport Terminal and Transport figures from November for both Belfast International Airport and Belfast City Airport were down when compared with 2018, by -13% and -7% respectively. However, Hotel Room Demand for December was up +0.7% for the year to date and rooms sold for this month were up by +1% suggesting not all was negative for the December period.

VI. Sales across all major store categories in the UK have declined in December 2019* by -4.7%. This is a slightly smaller drop than the -5.6% observed for December 2018. Sales declined in eight of the ten retailer categories for 2019, with Department Stores/Multi-Retail experiencing an -8.9% decline within the UK as a whole. From 2017 onwards there has been a double digit decline in sales for four retailer categories, including Fashion & Accessories and Department Stores/Multi-Retail. In contrast, sales in the Food & Beverage and Food & Convenience categories have experienced a much smaller decline from 2017 onwards with a decrease of -1.1% and -0.5% respectively. This supports the view that there is an increased demand for leisure/experience-based trips to bricks and mortar stores, rather than trips that are wholly transaction based for the in-store consumer market.

* Please see Appendix Four for Spring Board 2019 Christmas Footfall Review
Results

I. **Respondents**
Of the 154 respondents, 61 were multi-nationals (40%), 40 were independent retailers (26%) and 53 were from the hospitality industry (34%). This represents an increase from previous years compared with 131 respondents in 2018 and 102 respondents in 2017. This increase in respondents allows us to show a more representative view of business performance and attitudes within Belfast City Centre.

II. **November Footfall**
Businesses were asked to rate their Footfall performance for November 2019 compared with November 2018. The results are as follows:

- Of 154 respondents, 75 businesses reported a ‘Decrease’ in their footfall for the month of November 2019 compared with November 2018. This equated to 49% of those surveyed recording a decrease in footfall. This is a slight increase on the previous year where only 43% of businesses reported a decrease in footfall for the period of November 2018 compared with November 2017.
- 50 of the businesses surveyed did record an ‘Increase’ in their footfall for this period, equating to 32% of respondents. In comparison, in the 2018 survey 33% of respondents recorded an increase. Although this is a decline from the previous year it is a small margin for footfall for the month of November within Belfast City Centre.
- 29 businesses in Belfast City Centre reported ‘No Change’ in their November footfall compared with the previous year. This equates to 19% of survey respondents which is a

vi Please see Appendix Five for Map showing location of Respondents
decrease on the year (2018) prior where 24% of businesses stated ‘No Change’. However, the percentage for 2019 was not as low as recorded in 2017 where only 15% of respondents stated they experienced ‘No Change’ in their footfall.

![NOVEMBER FOOTFALL](image)

**Figure two: November Footfall Figures – Year on Year**

- Footfall varied across each business type but Hospitality observed the best results with respondents reporting a 45% increase in footfall for the November period compared with the previous year. This was not mirrored in the retail sector where both Multiple and Independent stores recorded a lower percentage increase with independents only expressing a 13% increase in footfall overall for this period. The following table shows the correlation between footfall figures and type of business in Belfast City Centre:

<table>
<thead>
<tr>
<th>Difference in Footfall between Nov-18 and Nov-19</th>
<th>Business Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Multiple</td>
</tr>
<tr>
<td>Increase</td>
<td>34%</td>
</tr>
<tr>
<td>Decrease</td>
<td>51%</td>
</tr>
<tr>
<td>No Change</td>
<td>15%</td>
</tr>
</tbody>
</table>

From 154 respondents 57 businesses provided footfall figures for the month of November. The overall average for the month was **-5.41%**. This is compared to **-2.8%** on footfall for November 2018 and **-2.3%** on footfall for November 2017. This shows that there has been a steady decline in footfall for the month of November over the past couple of years. These figures are highlighted below:
Figure three: Overall Footfall for November – Year on Year

### III. November Sales

Businesses were asked to rate their overall sales performance for November 2019 compared with November 2018. The results are as follows:

- **Out of the 154 businesses surveyed, 63 respondents reported a ‘Decrease’ in their sales figures for the month of November. This equalled 41% of those who were surveyed.**
  - Contrasted with the 2018 survey, where 39% of businesses reported a decrease in sales, this shows that there has been a 2% increase in the businesses that reported a decrease in their November sales from the previous year.

- **61 of the business respondents for 2019 recorded an ‘Increase’ in their November sales compared with 2018. This equated to 40% of those who responded to the survey.**
  - Comparatively, in 2018 this figure was 38% showing a 2% increase in businesses recording an increase in their sales figures for November when compared with the previous year. Although in 2017, this figure was 47% showing a decrease in sales performance from two years prior for November.

- **30 traders within Belfast City Centre recorded ‘No Change’ in their November sales compared with the previous year. This represented 19% of those businesses surveyed, which was a decrease on the previous year (2018) where 23% stated there was ‘No Change’ in sales for November.**

- **Hospitality reported the more favourable performance with 64% of Hospitality businesses surveyed reporting either an increase or no change in their sales for November compared to the previous year. This is compared with 56% of retail businesses who reported the same sentiments. Although, both these figures are a decrease on the percentages reported the year prior (2018) where 72% of hospitality and 57% of retail businesses recorded a positive performance.**
November sales figures varied across each business type when compared with November 2018 but Hospitality observed the best results with respondents reporting a 49% increase in sales for November 2019 compared with November 2018. These figures were not mirrored within the retail sector where both Multiple and Independent stores recorded a lower percentage increase than decrease. This translated as only a 30% increase for Independents and a 38% increase for Multiples in November sales when compared with the previous year (2018). The following table shows the correlation between Sales figures comparisons and types of businesses in Belfast City Centre:

<table>
<thead>
<tr>
<th>Difference in Sales between Nov-18 and Nov-19</th>
<th>Business Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Multiple</td>
</tr>
<tr>
<td>Increase</td>
<td>38%</td>
</tr>
<tr>
<td>Decrease</td>
<td>48%</td>
</tr>
<tr>
<td>No Change</td>
<td>14%</td>
</tr>
</tbody>
</table>

From the 154 respondents, 76 businesses provided sales percentages for the month of November. The overall average for the month was -3.45%. This is compared to -2% on sales figures for 2018 and +0.6% for sales in November 2017. These figures show that there has been a small but observable decline in November sales year on year. This is highlighted in the chart below:
Figure five: Overall Sales for November – Year on Year

IV. December Footfall
As with November, businesses were asked to rate their footfall performance for December 2019 compared with December 2018. The results are as follows:

- Of 154 respondents, 80 businesses reported a ‘Decrease’ in their footfall for December 2019 compared with December 2018. This meant that 52% of respondents recorded a decrease in footfall for this month. This is an increase on the previous year where only 38% of businesses reported a decrease in footfall for the period of November 2018 compared with November 2017. This shows a 14% increase in footfall decline from the previous year. Although, when compared with 2017 there was a reduction of 6% (overall 58% for 2017) in footfall decline for 2019.

- 48 of the business respondents for 2019 recorded an ‘Increase’ in their December footfall compared with 2018. This equated to 31% survey respondents. Comparatively, in 2018 this figure was 46% showing a 15% decline in businesses recording an increase in their footfall figures for December when compared with the previous year. Although in 2017, only 25% of businesses reported an increase in their December footfall from the previous year.

- 26 businesses in Belfast City Centre recorded ‘No Change’ in their December footfall compared with the previous year. This equated to 17% of survey respondents which is on par with the year previous but showed a 1% increase when compared with the 2017 survey.
Figure six: December Footfall Figures – Year on Year

- Footfall for each business type in December varied, but Hospitality observed the best results with respondents reporting a 45% increase in footfall for the December period when compared with the previous year. This high percentage increase was not reflected within the retail sector where both Multiple and Independent stores recorded a lower percentage increase for footfall for December. Independent stores only reported a 15% increase in footfall overall while Multi-national stores recorded a 30% increase for the month of December 2019 compared with December 2018. The following table shows the correlation between Footfall figures and type of business in Belfast City Centre:

<table>
<thead>
<tr>
<th>Difference in Footfall between Dec-18 and Dec-19</th>
<th>Business Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Multiple</td>
</tr>
<tr>
<td>Increase</td>
<td>30%</td>
</tr>
<tr>
<td>Decrease</td>
<td>59%</td>
</tr>
<tr>
<td>No Change</td>
<td>11%</td>
</tr>
</tbody>
</table>

From 154 respondents, 55 businesses provided footfall figures for the month of December. The overall average for the month was **-6.68%**. This is compared to **-3.1%** on footfall for December 2018 and **-4.5%** on footfall for December 2017. This percentage shows that overall footfall has been in decline for the month of December for Belfast City Centre, with last year seeing a slight increase. Comparing the figures year on year December 2019 saw the largest decrease for the month. These figures are highlighted in the chart below:
V. **December Sales**

As with November businesses were asked to rate their overall sales performance for December 2019 compared with December 2018. The results are as follows:

- Out of the 154 businesses surveyed, 69 respondents reported a ‘Decrease’ in their sales figures for the month of December. This equated to 45% of those who were surveyed. In the 2018 survey, 34% of businesses reported a decrease in sales which is an 11% decrease on the 2019 results, however in 2017 this figure was 47%.
- 60 of the business respondents for 2019 recorded an ‘Increase’ in their December sales compared with 2018. This equated to 38% of those who responded to the survey. In comparison, respondents in 2018 recorded a 49% increase in their sales for December from the previous year. This shows a 10% decrease in businesses reporting an increase in their sales. Similarly in 2017 this figure was 43% showing a significant reduction in 2019 for stores recording a sales increase in the month of December when compared with previous years.
- 25 businesses within Belfast City Centre recorded ‘No Change’ in their December sales when compared with the previous year. This represented 16% of those businesses surveyed which was a slight decrease on the previous year (2018) where 17% stated there was ‘No Change’ in sales for December. In 2017 9% of stores reported that they experienced ‘No Change’ in their sales performance when compared with the previous year.
- Hospitality businesses reported the more favourable performance with 70% of respondents surveyed reporting either an increase or no change in their sales for December compared to the previous year. This is compared with 48% of retail businesses who reported the same sentiments. However, both these figures are a decrease on the percentages reported the year prior (2018) where 79% of hospitality and 61% of retail businesses recorded a positive performance.
December sales figures varied across each business type when compared with December 2018 but Hospitality observed the best results with respondents reporting a 55% increase in sales for December 2019 when compared with December 2018. This high percentage increase was not mirrored within the retail sector where both Multiple and Independent stores recorded a lower percentage increase. This translated as a 23% increase for Independents and a 36% increase for Multiples in December sales when compared with the previous year’s sales (2018). The following table shows the correlation between sales figures comparisons and types of businesses in Belfast City Centre:

<table>
<thead>
<tr>
<th>Difference in Sales between Dec-18 and Dec-19</th>
<th>Business Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Multiple</td>
</tr>
<tr>
<td>Increase</td>
<td>36%</td>
</tr>
<tr>
<td>Decrease</td>
<td>54%</td>
</tr>
<tr>
<td>No Change</td>
<td>10%</td>
</tr>
</tbody>
</table>

From the 154 respondents 77 businesses provided sales percentages for the month of December. The overall average for the month was **-1.49%**. This is compared to **+0.7%** on sales figures for 2018 and **+0.6%** for sales figures in December 2017. These figures show that there has been a significant decrease in overall sales for December when compared with previous years across Belfast City Centre. For example, both sales averages for December 2018 and 2017 recorded a positive overall average percentage. These figures are highlighted in the chart below:
VI. **Busiest Week**

Survey Respondents were asked to specify which one week they observed their biggest sales over the Christmas trading period. This was broken down into a range of weeks which are listed below:

- 18\textsuperscript{th} November – 24\textsuperscript{th} November
- 25\textsuperscript{th} November – 1\textsuperscript{st} December
- 2\textsuperscript{nd} December – 8\textsuperscript{th} December
- 9\textsuperscript{th} December – 15\textsuperscript{th} December
- 16\textsuperscript{th} December – 22\textsuperscript{nd} December
- 23\textsuperscript{rd} December – 29\textsuperscript{th} December

- Results show 56.49\% of respondents (87 responses) felt that the week commencing – 16\textsuperscript{th} December - 22\textsuperscript{nd} December – was their busiest trading week. This week is normally regarded as the busiest retail week of the year as it includes the last few shopping days before Christmas including ‘Super Saturday’. Belfast One’s monthly footfall data from Springboard reported that for this week the busiest day for footfall was Friday 16\textsuperscript{th} December, with 53,329 recorded visitors to Belfast City Centre.

- The second busiest week recorded by respondents was week commencing – 9\textsuperscript{th} December – 15\textsuperscript{th} December – but with a significant smaller proportion of respondents (19 responses) only 12.34\% of business selected this week as their busiest week. This coincides with December being regarded as one of the most important retail months of the year, especially the two weeks on the lead up to Christmas.

- Weeks commencing – 25\textsuperscript{th} November – 1\textsuperscript{st} December and 23\textsuperscript{rd} December – 29\textsuperscript{th} December – were selected by 11.04\% of respondents (17 responses). These weeks include ‘Black Friday’ weekend and ‘Boxing Day’ which are also regarded as important trading periods for retailers. This suggests that although the two weeks on the lead up to Christmas are the more important trading periods, ‘Black Friday’ and ‘Boxing Day’ sales are also important to the retail industry.
VII. Christmas Sales Performance for 2019

Respondents were asked about their feelings towards their Christmas performance for 2019. Businesses were asked to choose whether they felt their Christmas sales performance for 2019 was ‘Better’, ‘Worse’ or ‘As Expected’ for this period. The results are outlined below:

Q7 Do you feel your Christmas sales performance for 2019 was Better or Worse than expected?

The results show that out of 154 businesses surveyed, 76 of the respondents felt that their Christmas performance for 2019 was worse than they anticipated. This equated to 49.35% of responses given. This falls in line with both sales and footfall figures for the year where the percentage ‘decrease’ recorded for these indicators was higher than the previous year.
53 businesses did report that they felt their performance over the Christmas period was better than they were expecting, measuring as 34.42% of respondents. 25 respondents stated that their performance was ‘as expected’ for the Christmas trading period, equalling 16.23%. This suggests that although a higher percentage of businesses felt their performance was worse than they had hoped for Christmas, some stores did experience a positive retail sales performance for 2019 despite figures suggesting that overall stores performed worse than the year prior.

As was the trend with footfall and sales, hospitality reported the highest percentage of positive responses with 45% of hospitality businesses stating they felt their Christmas sales performance for 2019 was ‘Better’ than they were expecting. Contrast this against the lower percentages for independent and multiple businesses, 28% and 30% respectively, who felt their 2019 Christmas performance was ‘Better’ than expected.

![Figure twelve: Graph showing percentage of Businesses reporting a ‘better’ 2019 Christmas sales performance](image)

**VIII. Business Performance over the next 12 months**

Businesses were asked if there is anything over the next 12 months that could help improve their business performance. They were given several options to choose from as well as the ability to comment their own suggestions. Respondents could choose one or more of the options available. The results are outlined below:

Q8 Is there anything in the next 12 months that could help improve your Business performance?

![Figure Thirteen: Chart showing response to factors that could help improve Business performance](image)
Results show that businesses feel that more emphasis on ‘Events’ and ‘Marketing’ within Belfast City Centre could help them improve their business performance for 2020. 45.03% of traders, equating to 68 respondents, expressed this sentiment for both options.

30.46% of respondents also felt that importance should be given to improvements in ‘Accessibility’ within Belfast City Centre which would then hopefully translate to better business performance for 2020.

Of those businesses that choose ‘Other’ as an option the main comments observed are outlined below:

- Majority of respondents felt that parking improvements, such as reduced cost or free parking within Belfast City Centre could help towards improving their footfall and sales for 2020.
- More promotions within city centre including better marketing of late night shopping, tourism and a wider spread of the Christmas Markets.
- Another issue highlighted was homelessness, begging and anti-social behaviour which businesses felt was decreasing their store performance and the overall view of the city.
- Respondents felt that an increase in Police presence would also help towards improving their business performance for 2020 and making city centre visitors feel safer.

IX. **Issues and Concerns for 2020**

Businesses were also asked to comment on any other issues or concerns they had relating to their business performance for 2020. The sentiments received are as follows:

1) A large number of respondents commented that they were concerned about the declining numbers in footfall observed in 2019 and that this will be a major concern for them going into 2020.

2) Businesses expressed that the uncertainty around Brexit and the effect it will have on the economy and tourism in Northern Ireland has become a significant worry for them as we move into 2020.

3) Another issue highlighted by respondents was the rise in rates and how this will affect their overall income and performance for the coming year.

4) Businesses pointed out that drug use and anti-social behaviour within the city is a major issue that needs to be tackled. They expressed that this is having an effect on customers, store perception, staff safety and the general maintenance of their premises and the surrounding area.

5) As mentioned before, parking issues including price and availability for customers has been highlighted as a topic of concern by businesses who fear there is not enough being done to increase footfall when it comes to this matter.

6) Trading hours were mentioned by several businesses who felt that there could be more done to rationalise the current advertised opening hours for stores during the Christmas period and for other events in the city as currently stores operate a mixed approach to opening hours.

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vii Issues ranked in order of importance to respondents
Conclusions

Analysis of this year’s Christmas Retail performance and Business confidence survey has presented some conclusions to be brought forward for 2020. These conclusions are outlined below:

I. In November, 49% of businesses reported a decrease in footfall when compared with the year prior. This decline in footfall was observed across the UK, with Springboard\(^viii\) reporting a \(-4.6\)% decrease on the year previous. Belfast One’s Springboard footfall was recorded as \(-1.11\)% when compared to the previous year. Belfast recorded an overall average of \(-5.41\)% for footfall for this period representing a higher percentage decline than the UK average. The overall average footfall percentage for November has shown a steady decline year on year within Belfast.

This footfall decline in November translated across to sales for Businesses with 41% of retailers recording a decrease in their sales when compared with the previous year. The overall average for sales this year was recorded as \(-3.45\)% which is an observable decline when compared with the previous years, with 2018 reporting \(-2\)% and 2017 reporting \(+0.60\)% on their average November sales year on year. Despite this trend in both sales and footfall decline, Hospitality are reporting a more positive picture with hospitality businesses reporting a 45% increase in footfall and a 49% increase in sales for this period when compared with the previous year.

II. Similarly to November, over half the respondent businesses reported a decrease in footfall for December, equating to 52%. Belfast One’s Springboard\(^ix\) data reported that across the UK footfall was \(-3.6\)% year on year, whereas Belfast One’s Springboard data recorded a \(-6.4\)% decrease in footfall when compared with the previous year. This shows a considerably higher percentage change for Belfast footfall comparatively with the UK. Belfast businesses recorded an overall average of \(-6.68\)% for December, which falls in line with springboards footfall figures for Belfast, and shows a significant decrease in footfall as a whole for the month of December within Belfast City Centre. This 2019 figure is much higher than 2018 \((-3.10\)%\) and 2017 \((-4.5\)%\).

December sales supported this downward trend in bricks and mortar retail shopping with 45% of businesses recording a decrease in their sales. This translated to an overall average of \(-1.49\)% decrease when compared with the previous year. Comparing this information with previous years, 2018 and 2017, suggest a worrying picture as this was the first year that an overall decline in sales was observed for December. Despite this negative picture being observed for sales in December, hospitality businesses are once again reporting a positive response showing a 45% increase in their footfall and 55% increase in their sales for the month of December. As has been the reported trend for several years now, consumers are more interested in an experience than traditional retail shopping opting for dining and leisure activities and the increase in on-line shopping supporting a view that in-store retail has seen an observable decline in recent years.

\(^viii\) Please see Appendix Six for Springboard November Footfall Report for Belfast

\(^ix\) Please see Appendix Six for Springboard December Footfall Report for Belfast
III. Businesses were asked to highlight which week was their busiest in terms of sales. Unsurprisingly the most popular week chosen by respondents was the week before Christmas (16th – 22nd December) which is normally regarded as one of the most important retail trading weeks of the year and includes ‘Super Saturday’. The second week of December (9th – 15th December) also proved popular for businesses suggesting that even though some negative results were observed regarding footfall and sales for the 2019 December Christmas period, December is still a very important month for sales and trading within Belfast.

Following on from identifying their busiest sales week, businesses were asked to rate their Christmas Sales Performance for 2019. 49.35% of respondents expressed that they felt their performance over the Christmas period was ‘Worse’ than they were anticipating. This figure was nearly half of all respondents, showing that sentiments towards Christmas 2019 amongst businesses was not a positive one. However, as has been observed throughout the analysis of this survey, hospitality has reported a better performance for Christmas 2019 with 45% of hospitality businesses stating they enjoyed a ‘Better’ Christmas performance than expected.

IV. Moving into the New Year, businesses were asked about their business performance for the coming 12 months. In regards to anything that could help them improve their business performance, 45% of retailers expressed that a focus on ‘Events’ and ‘Marketing’ within Belfast City Centre would be beneficial to helping them achieve business targets and improve sales and footfall for 2020. ‘Environmental Improvements’ was also highlighted as a factor that could help boost business efficiency and performance.

Businesses were also asked about any issues or concerns they may have regarding their business performance for the next 12 months therefore highlighting some important things to be considered as we move into the new trading year. The main issues and concerns expressed are below:

- Declining Footfall numbers observed in 2019
- Drug use and anti-social behaviour within the City Centre
- Parking issues and availability for staff and customers
- The uncertainty around Brexit and its subsequent effects
- The rise in rates bills for businesses in 2020
- Trading hours around events within the City Centre

These factors are something to be considered when looking at retail performance for 2020 as they may have a profound effect on how businesses perform and conduct themselves in order to overcome these potential barriers to positive economic performance.
Recommendations

After analysis of the survey data, a few recommendations have been drawn together to conclude on this year’s findings:

❖ This year, as was the trend with previous years, there has been a decline in footfall within the city centre. This decline in footfall has presented problems for both multiples and independent stores alike. As a result looking at potential events and in-store marketing may be crucial to driving footfall back into stores in order to increase sales. Collaborative promotion highlighting exclusive deals focused on in-store only may help ease the observed decline in footfall and sales seen over this past year.

❖ Hospitality businesses have experienced the best performance over the Christmas period for 2019 in both footfall and sales when compared with other types of retailers. This shows that consumers are potentially interested in a more experienced city centre trip rather than direct in-store shopping. This trend has been observed throughout the UK as highlighted by Springboard in their recent Christmas Footfall Review. With this in mind, a collaborative venture with in-store shopping and the hospitality industry might create that experience based shopping venture that consumers are more geared towards in the current retail climate.

❖ Better awareness and visibility of parking facilities and other city centre transport, such as Translink Metro and Park and Ride services, may boost city centre visitors and increase in-store footfall. A lot of businesses expressed that parking was a major issue they faced for both staff and increasing customers. Therefore an increase in knowledge and marketing of transport deals and car parking locations, safety and prices may entice consumers to choose Belfast City Centre as a shopping location rather than out-of-town shopping centres.

❖ Trading hours within city centre have become a topic of conversation for a number of years with business feeling like they do not always benefit from late night opening hours, events within city centre and the restrictions around trading hours on Sundays in the city. Belfast City Council are currently conducting a ‘Sundays in the City’ survey to gauge both public and business opinions surrounding this shopping day. They aim to gain views on “how we can attract new visitors to Belfast City Centre to increase footfall and spend on Sundays, particularly during the spring and summer months.” In addition to this, Belfast City Centre Management will be gauging and assessing business attitudes towards ‘Late Night Shopping’ within the city following on from the ‘Business Performance Report’ research suggesting footfall and sales are in decline especially for late night shopping within city centre.

❖ The ‘City Centre Beat’ and ‘Street Beat’ policing initiatives operating in the City Centre, Linen Quarter and Cathedral Quarter are dedicated to tackling drug use and anti-social behaviour around the city centre. They are committed to addressing and up-holding quality of life issues for businesses within the city. There is also the ‘Retail Crime Watch’ scheme that

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xi Please see Appendix Eight for results of this Survey
businesses in Belfast City Centre can avail of to help tackle retail crime and shop lifting. In addition to this, Belfast City Centre Management and partners run ‘Protect Your Business’ workshops to help businesses within the city to combat various issues surrounding business safety. Belfast City Centre Management will continue to collaborate with the Police Service Northern Ireland (PSNI), through the ‘City Centre Beat’ scheme and other initiatives, and work with other parties to deliver protect your business workshops throughout 2020.
Appendix One: BCCM Survey issued to Businesses

We are conducting the annual Business Performance survey within Belfast City Centre. This survey will help us to establish a true reflection of business performance during the important trading period of Christmas 2019 and give you an opportunity to provide an insight into Business confidence for 2020.

Your views will form part of a composite report which can be made available to you in late January. The information provided will be treated with the strictest confidentiality and no individual business will be identified.

* 1. Business Name

* 2. How did November 2019 footfall compare with November 2018?
   - [ ] Increase
   - [ ] Decrease
   - [ ] No Change
   ***Please indicate percentage change***

* 3. How did December 2019 footfall compare with December 2018?
   - [ ] Increase
   - [ ] Decrease
   - [ ] No Change
   ***Please indicate percentage change***
* 4. How did November 2019 sales compare with November 2018?
   - [ ] Increase
   - [ ] Decrease
   - [ ] No Change
   ***Please indicate percentage change***

* 5. How did December 2019 sales compare with December 2018?
   - [ ] Increase
   - [ ] Decrease
   - [ ] No Change
   ***Please indicate percentage change***

* 6. What was your Busiest Week?
   - [ ] 18th November - 24th November
   - [ ] 25th November - 1st December
   - [ ] 2nd December - 8th December
   - [ ] 9th December - 15th December
   - [ ] 16th December - 22nd December
   - [ ] 23rd December - 29th December

* 7. Do you feel your Christmas sales performance for 2019 was Better or Worse than expected?
   - [ ] Better
   - [ ] Worse
   - [ ] Don't Know

8. Is there anything in the next 12 months that could help improve your Business performance?
   - [ ] Events
   - [ ] Marketing
   - [ ] Accessibility
   - [ ] Environmental Improvements
   - [ ] Other
   If Other, please comment below:

* 9. Comment below if you have any other concerns or issues relating to your business performance for the next 12 months:
**Appendix Two: List of Businesses Surveyed**

<table>
<thead>
<tr>
<th>KFC</th>
<th>Beaverbrooks</th>
<th>McCanns</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dawsons</td>
<td>Sony Centre</td>
<td>The Picture Gallery</td>
</tr>
<tr>
<td>Lauren May Jewellers</td>
<td>Primark</td>
<td>Gordons (Cornmarket)</td>
</tr>
<tr>
<td>Flying Tiger</td>
<td>The Allotment Bistro</td>
<td>City Flooring Centre</td>
</tr>
<tr>
<td>Steensons</td>
<td>James Street South</td>
<td>Abacus</td>
</tr>
<tr>
<td>Kids Store Pricewise</td>
<td>Daisy Baby Boutique</td>
<td>Beyond Skin Clinic</td>
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<tr>
<td>My Old Toy Box</td>
<td>White Stuff</td>
<td>Patisserie Valerie</td>
</tr>
<tr>
<td>The Trophy Shop</td>
<td>Yours Clothing</td>
<td>The Morning Star</td>
</tr>
<tr>
<td>Blue Inc.</td>
<td>Glendale Retail Ltd</td>
<td>DW Sports</td>
</tr>
<tr>
<td>Ellisons Jewellers</td>
<td>Paperchase</td>
<td>Craftworld</td>
</tr>
<tr>
<td>Absolute Beauty</td>
<td>Liverpool Store</td>
<td>GD1</td>
</tr>
<tr>
<td>Jeffery's bakers</td>
<td>Learning Space</td>
<td>Regetta</td>
</tr>
<tr>
<td>Savers</td>
<td>DV8</td>
<td>Renata’s Alterations</td>
</tr>
<tr>
<td>Argento</td>
<td>Next</td>
<td>Avoca</td>
</tr>
<tr>
<td>Stradivarius</td>
<td>Zara</td>
<td>Oliver Bonas</td>
</tr>
<tr>
<td>Joules</td>
<td>Newbridge Silverware</td>
<td>McDonalds</td>
</tr>
<tr>
<td>Forbidden Planet</td>
<td>Ten Square Hotel</td>
<td>Café Nero (Donegall Square West)</td>
</tr>
<tr>
<td>Café Nero (Royal Avenue)</td>
<td>Bravissimo</td>
<td>E.Lauro Antiques and Jewellery</td>
</tr>
<tr>
<td>Fresh Garbage</td>
<td>Pic &amp; Mix</td>
<td>Mace (Royal Avenue)</td>
</tr>
<tr>
<td>Hallmark</td>
<td>Footlocker</td>
<td>Spar (Royal Avenue)</td>
</tr>
<tr>
<td>Carrolls (Castle Place)</td>
<td>Obento</td>
<td>Game</td>
</tr>
<tr>
<td>Torino Café</td>
<td>G Greggs (Royal Avenue)</td>
<td>Boojum (Great Victoria Street)</td>
</tr>
<tr>
<td>Una Rodden Couture</td>
<td>Accessorise</td>
<td>JD Sports (Donegall Place)</td>
</tr>
<tr>
<td>The Fitzwilliam Hotel</td>
<td>Vietnamese Coffee Co.</td>
<td>Starbucks (Great Victoria Street)</td>
</tr>
<tr>
<td>Boojum (Great Victoria Street)</td>
<td>Subway (Great Victoria Street)</td>
<td>Boux Avenue</td>
</tr>
<tr>
<td>Claire’s Accessories</td>
<td>All Saints</td>
<td>Lush</td>
</tr>
<tr>
<td>Irish Tour Tickets</td>
<td>Fossil Watches</td>
<td>Optical Express</td>
</tr>
<tr>
<td>Cotswolds</td>
<td>Grounds Espresso</td>
<td>Ginger Bistro</td>
</tr>
<tr>
<td>The Works</td>
<td>Fat Face</td>
<td>Greggs (Castle Lane)</td>
</tr>
<tr>
<td>Greggs (Donegall Square West)</td>
<td>Frankie &amp; Bennys</td>
<td>Dune</td>
</tr>
<tr>
<td>Robinsons</td>
<td>Northern Whig</td>
<td>Hugo Boss</td>
</tr>
<tr>
<td><strong>Seasalt Cornwall</strong></td>
<td><strong>3 Store</strong></td>
<td><strong>Argos</strong></td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------</td>
<td>----------</td>
</tr>
<tr>
<td><strong>Kiehls</strong></td>
<td><strong>Bon Marche</strong></td>
<td><strong>GAP</strong></td>
</tr>
<tr>
<td><strong>Costa Coffee</strong></td>
<td><strong>Auntie Annies</strong></td>
<td><strong>ECCO</strong></td>
</tr>
<tr>
<td><strong>Jack &amp; Jones</strong></td>
<td><strong>Hawkins Bazaar</strong></td>
<td><strong>Mango</strong></td>
</tr>
<tr>
<td><strong>Michael Kors</strong></td>
<td><strong>Revolution De Cuba</strong></td>
<td><strong>Phase 8</strong></td>
</tr>
<tr>
<td><strong>Granny Annies</strong></td>
<td><strong>Muriels</strong></td>
<td><strong>Pizza Hut</strong></td>
</tr>
<tr>
<td><strong>The National</strong></td>
<td><strong>Pull and Bear</strong></td>
<td><strong>Visit Belfast</strong></td>
</tr>
<tr>
<td><strong>The John Hewitt</strong></td>
<td><strong>Bullitt Hotel</strong></td>
<td><strong>Europa Hotel</strong></td>
</tr>
<tr>
<td><strong>River Island</strong></td>
<td><strong>TGI Fridays</strong></td>
<td><strong>Craft NI Gallery</strong></td>
</tr>
<tr>
<td><strong>Teamwork</strong></td>
<td><strong>Ground Espresso Bar</strong></td>
<td><strong>Henrys/The Jailhouse</strong></td>
</tr>
<tr>
<td><strong>The Spainard</strong></td>
<td><strong>Sunflower Bar</strong></td>
<td><strong>Queens Café Bar</strong></td>
</tr>
<tr>
<td><strong>Little Heart</strong></td>
<td><strong>Nandos (Dublin Road)</strong></td>
<td><strong>Alex Mekki</strong></td>
</tr>
<tr>
<td><strong>Pizza Express (Bedford Street)</strong></td>
<td><strong>Matchets Music</strong></td>
<td><strong>Rio-Brazil</strong></td>
</tr>
<tr>
<td><strong>Edo</strong></td>
<td><strong>Arthur’s Coffee House (Upper Arthur Street)</strong></td>
<td><strong>Waterstones</strong></td>
</tr>
<tr>
<td><strong>Par Ici</strong></td>
<td><strong>Wickerman</strong></td>
<td><strong>Made in Belfast (Cathedral Quarter)</strong></td>
</tr>
<tr>
<td><strong>Acton and Sons</strong></td>
<td><strong>Make-up Pro Store</strong></td>
<td><strong>Starbucks (Castlecourt)</strong></td>
</tr>
<tr>
<td><strong>Arthur’s Coffee House (Gloucester Street)</strong></td>
<td><strong>The Entertainer</strong></td>
<td><strong>Wrapped Up</strong></td>
</tr>
<tr>
<td><strong>Fresh Pop</strong></td>
<td><strong>Made in Belfast (Wellington Street)</strong></td>
<td><strong>The Lantern</strong></td>
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<tr>
<td><strong>Robinson’s Shoemakers Ltd</strong></td>
<td><strong>Lunns</strong></td>
<td><strong>Seams Perfect</strong></td>
</tr>
<tr>
<td><strong>02 (Castlecourt)</strong></td>
<td><strong>Trespass</strong></td>
<td></td>
</tr>
</tbody>
</table>
Appendix Three: BCCM Geographical Boundary
Appendix Four: Spring Board 2019 UK Christmas Footfall Review

Footfall declined annually by -2.5% in December 2019. It was anticipated that footfall would decline in December as it has done so in all but one year since 2009, and so this magnitude of decline was not unexpected.

The year on year drop in footfall was marginally smaller than last year when footfall declined by -2.6%, but it is the third highest drop since the post recession year in 2011. The result is particularly disappointing as the 2019 December trading period included Black Friday which footfall was by +3.3% from Black Friday 2018.

Sales across all major store categories declined by -4.7% in December 2019, a slightly smaller drop than the -5.6% decline in December 2018.

The results for store sales in December reflect the footfall results for the month, which moved from -2.6% in December 2018 to -2.5% in 2019.

Sales declined in eight of the ten retail categories, with the greatest downward movements recorded in Electricals & Mobile Phones (-13.3%), Entertainment & Books (-10.3%) and Department Stores/Multi Retail (-8.9%).

Over the two years from 2017, there has been more than a double digit decline in sales in four retail categories - Department Stores/Multi Retail, Electricals & Mobile Phones, Entertainment & Books and Fashion & Accessories. In contrast sales in the Food & Beverage and Food & Convenience categories declined over the same two year period by just -1.1% and -0.3% respectively. These results reflect the trend revealed by Springboard’s data for an increased demand for leisure/entertainment based trips to bides and mortar destinations, rather than trips that are wholly transaction focused.
Appendix Five: Map showing location of Respondents
### Appendix Six: November and December Footfall Report for Belfast


**Footfall Report for:**

**Belfast One BID**

**Weekly This Month: 4**

**Weekly Last Month: 4**

<table>
<thead>
<tr>
<th>Monthly Footfall</th>
<th>Year to date %</th>
<th>Year on year %</th>
<th>Month on month %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2019</td>
<td>2018</td>
<td>2019</td>
</tr>
<tr>
<td>Belfast One BID</td>
<td>-3.6 %</td>
<td>4.5 %</td>
<td>-1.1 %</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>-2.8 %</td>
<td>0.5 %</td>
<td>-7.3 %</td>
</tr>
<tr>
<td>High Street Index - BDSU(BDSU* - Multifunctional)</td>
<td>-1.8 %</td>
<td>-1.9 %</td>
<td>-4.1 %</td>
</tr>
<tr>
<td>UK</td>
<td>-2.1 %</td>
<td>-2.6 %</td>
<td>-4.6 %</td>
</tr>
</tbody>
</table>

**Note:** Additional 3 counters were installed on 27/02/2017Benchmark calculations (Year on Year and Month on Month) have been calculated using like for like data sets (only those counters available in both comparison periods) to ensure statistical accuracy.

### Headlines

- **Football for the year to date is 3.6% down on the previous year.**
- The number of visitors counted for month commencing 28 October 2019 was 3,066,274.
- The busiest day in month commencing 28 October 2019 was Saturday 16 November with 171,605 visitors.
- The peak hour of the month was 15:00 on Saturday 23 November 2019 with football of 20,335.

#### December 2019. 25 Nov 2019 - 29 Dec 2019

**Footfall Report for:**

**Belfast One BID**

**Weekly This Month: 5**

**Weekly Last Month: 4**

<table>
<thead>
<tr>
<th>Monthly Footfall</th>
<th>Year to date %</th>
<th>Year on year %</th>
<th>Month on month %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2019</td>
<td>2018</td>
<td>2019</td>
</tr>
<tr>
<td>Belfast One BID</td>
<td>-4.0 %</td>
<td>6.3 %</td>
<td>-6.4 %</td>
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<tr>
<td>Northern Ireland</td>
<td>-2.9 %</td>
<td>0.8 %</td>
<td>-6.5 %</td>
</tr>
<tr>
<td>High Street Index - BDSU(BDSU* - Multifunctional)</td>
<td>-2.0 %</td>
<td>-2.0 %</td>
<td>-4.0 %</td>
</tr>
<tr>
<td>UK</td>
<td>-2.2 %</td>
<td>-2.5 %</td>
<td>-3.6 %</td>
</tr>
</tbody>
</table>

**Note:** Additional 3 counters were installed on 27/02/2017Benchmark calculations (Year on Year and Month on Month) have been calculated using like for like data sets (only those counters available in both comparison periods) to ensure statistical accuracy.

### Headlines

- Football for the year to date is 4% down on the previous year.
- The number of visitors counted for month commencing 25 November 2019 was 5,271,218.
- The busiest day in month commencing 25 November 2019 was Monday 23 December with 254,398 visitors.
- The peak hour of the month was 15:00 on Monday 25 December 2019 with football of 50,540.
**Appendix Seven: Footfall Overview for Belfast in 2019**

**Footfall - rolling 12 months**

The figures shown below are calculated using weekly averages.

<table>
<thead>
<tr>
<th>Year</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018-2019</td>
<td>648,075</td>
<td>673,389</td>
<td>649,141</td>
<td>680,995</td>
<td>667,744</td>
<td>745,444</td>
<td>727,148</td>
<td>812,928</td>
<td>752,502</td>
<td>719,298</td>
<td>777,022</td>
<td>1,054,243</td>
</tr>
<tr>
<td>2017-2018</td>
<td>575,694</td>
<td>659,121</td>
<td>670,032</td>
<td>722,706</td>
<td>769,159</td>
<td>642,871</td>
<td>806,589</td>
<td>850,543</td>
<td>769,130</td>
<td>680,487</td>
<td>775,452</td>
<td>1,073,847</td>
</tr>
</tbody>
</table>

| Year on Year % | 13.0% | 2.2% | -5.1% | -5.8% | -13.2% | -11.6% | -9.8% | -4.4% | -2.2% | 5.7% | 0.2% | -1.8% |

Year on year % is calculated by comparing the 2018-2019 period with the 2017-2018 period i.e the figure for December compares December 2019 to December 2018.
Appendix Eight: Results from ‘Late Night Shopping’ Survey

Survey Respondents:

- Number of Responses – 20
- All Multiples
- Responses received from a range of City Centre streets including Donegall Place, Arthur Street, Cornmarket, Castle Place and Castle Lane.

Questions:

Q2 What is your opinion towards trading until 8pm on Thursday evenings?

- Of the 20 respondents, 15 stated they would agree to reducing trading hours on Thursday evenings to 8pm. This equated to 75% of businesses. Reasons given for this were that retailers had seen a decrease in both sales and footfall for this time period, stating that 8-9pm was the quietest trading period for the day.
- The five respondents that disagreed with reducing trading hours to 8pm on Thursday, expressed that this was because they did not notice a significant dip in their sales and footfall for this last trading hour.

Q3 What is your opinion towards trading until 8pm on Friday Evenings?

- 12 respondents stated that they would not be happy to extend Friday evening trading hours to 8pm. Businesses expressed the reasons regarding this were that they did not see Friday evenings as being busy enough to warrant extending trading hours.
The 8 businesses that agreed to extend Friday evening trading hours till 8pm stated that Friday night presented a better trade period for them. They observed an increase in their sales for the last hour on a Friday and felt that extended trading hours would be beneficial for them.

Of the 20 businesses surveyed, 13 claimed they would be interested in participating in a collective 'Belfast City Centre Offers' promotional programme. This would allow them to highlight in-store events, launches, special offers and create better marketing for their store within the city.

The 7 retailers that said ‘No’ did so due to the fact that this agreement would have to come from their Head Office and as a result they could not opt into such things without their confirmation. This suggests a positive sentiment as these retailers are not discrediting this idea but instead stating that they face restrictions from Head Office and opting in to collective promotions like this have to be agreed at a higher level.