

RETAIL SALES TRACKER



Retail Sales Performance Christmas & New Year 2017-18

Retail Sales Tracker Report (Christmas & New Year 2017-18)

*Eimear McCracken**

***c/o Belfast City Centre Management
2nd Floor Sinclair House
95 – 101 Royal Avenue
Belfast
BT1 1FE**

Contents

	Page Number
1. Introduction	3
2. Results	3 - 19
2.1 Figure One: <i>Multiple or Independent Retailers</i>	3
2.2 Figure Two: <i>Retailers opening hours December 2017</i>	4
2.4 Figure Three: <i>Sales performance November 2017 against November 2016</i>	5
2.7 Figure Four: <i>Footfall performance November 2017 against November 2016</i>	6
2.9 Figure Five: <i>Sales performance December 2017 against December 2016</i>	7
2.11 Figure Six: <i>Sales performance December 2017 against target</i>	8
2.14 Figure Seven: <i>Footfall performance December 2017 against December 2016</i>	9
2.17 Figure Eight: <i>Boxing Day Businesses Opened</i>	10
2.19 Figure Nine: <i>Boxing Day Sales Performance</i>	10
2.22 Figure Ten: <i>New Year's Day Businesses Opened</i>	11
2.23 Figure Eleven: <i>New Year's Day Sales Performance</i>	12
2.27 Figure Twelve: <i>Perception/rating of Christmas Lighting In The City Centre</i>	13
2.29 Figure Thirteen: <i>Did Businesses Benefit From A Saturday Switch-on Event?</i>	14
2.33 Figure Fourteen: <i>Christmas Advertising Campaign</i>	15
2.35 Figure Fifteen: <i>Christmas Advertising Campaign rating</i>	16
2.37 Figure Sixteen: <i>Rol Sales December 2017</i>	17
2.39 Figure Seventeen: <i>Rol Footfall December 2017</i>	18
2.40 Figure Eighteen: <i>Sales Performance 2018</i>	18
3. Conclusions	19 - 20
4. Recommendations	20 - 21
Appendix One (List of Surveyed Businesses)	23 - 25
Appendix Two (Advertised Christmas Opening Hours)	26

1.0 Introduction

- 1.1 Belfast City Centre Management conducts an annual Retail Sales Tracker survey with members of 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 sector over the Christmas period. Collating data allows us to measure retail performance accurately and gauges the views of the business community on issues that affect the trading environment.
- 1.2 A total of 102 businesses (both multiple and independently-owned) located within the BCCM geographical area of Belfast City Centre participated in the survey. Due to the nature of commercially sensitive information being 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 sector only.
- 1.3 In 2017 the retail sector has added several high-profile brands to Belfast City Centre, including Smiggle, Oliver Bonas, Nisbets, Newbridge Silverware, The Works, Rose and Brimstone plus several new businesses in the hospitality sector including Cuba Revolution, Babel at Bullitt, The Sagart, Bear and Doll and Café Parisien.
- 1.4 According to Springboard's Christmas Footfall Review of 2017, across the UK high street footfall fell by 7% to -4.4% in comparison to 2016. Overall footfall has dropped to -3.3% in 2017 which is a huge drop from the +1.6% in 2016.
- 1.5 Sales across the UK also fell to -3% in 2017 in comparison to -0.6% in 2016.

2.0 Results

- 2.1 Of the 102 survey respondents, 62 were multi-national and 40 were independents.

Q2 Is your business a multiple or independent?

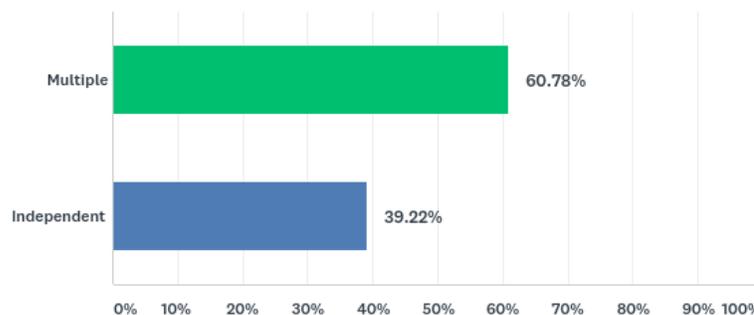


Figure One: Multiple or Independent Retailers

2.2 Retailers were asked if they had opened in accordance with the advertised Christmas opening hours (Appendix Two), which were proposed by the Retail Steering Group and endorsed at the October 2017 Business Forum.

- 46.08% of respondents stated they did not open in line with the advertised hours (a decrease of 15.92% not complying on 2016).
- 53.92% of respondents did however comply with the advertised opening hours (an increase of 14.92%). (Figure Two).

9 independent businesses complied with late night opening all of December whilst 31 did not. This is in comparison to no independents doing so in 2016. In terms of multiples, 19 multiples did not comply with the opening hours in comparison to 26 last year. Some of the reasons not to trade until 9pm all of December included:

- Low footfall in the area
- Some businesses traded late night for the last 2 weeks only
- Not financially viable
- Trialled in previous years and does not justify staffing costs.

Q3 Did your business comply with the advertised opening hours throughout December 2017?
(late night all of December)

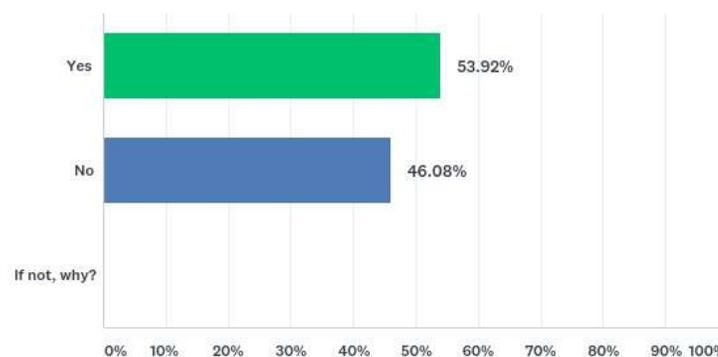


Figure Two: Retailers opening hours December 2017

2.3 Despite the advertised opening hours being publicised that Belfast was open 'late night all of December' and the annual increase in businesses doing so, the quantity of businesses still not complying with the advertised opening hours (almost half) highlights the constraints and concerns of a number of businesses in terms of their overheads and the lack of footfall in the evenings within Belfast City Centre.

2.4 Businesses were asked to rate their sales performance for November 2017 compared with November 2016. Overall:

- 47.06% of businesses were up (a decrease of 15% compared to 2016)
- 8.82% of businesses achieved (a decrease of 5.18% compared to 2016)
- 44.12% of businesses were down (an increase of 20% compared to 2016)

Q4 How did November 2017 sales compare with November 2016?

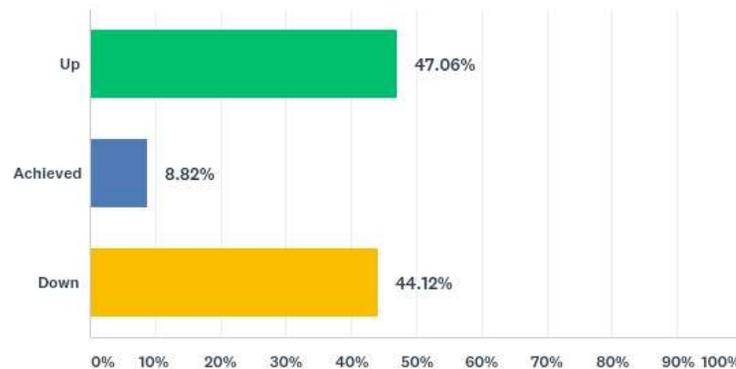


Figure Three: Sales performance November 2017 against November 2016

2.5 Breaking this down into multiple and independents for November 2017 sales compared with November 2016:

- 43.54% of multiple retailers were up on sales
- 52.5% of independents were up on sales
- 4.8% of multiple retailers achieved sales
- 15% of independents achieved sales
- 51.6% of multiples were down on sales
- 32.5% of independents were down on sales

2.6 56 businesses provided their sales percentage change for November 2017 compared to November 2016. The average sales for November 2017 was **+0.6%**.

2.7 Relating to footfall performance for November 2017 against November 2016:

- 28.43% of businesses were up (a decrease of 19.57% compared to 2016)
- 14.71% of businesses achieved (a decrease of 11.29% compared to 2016)
- 56.86% of businesses were down (an increase of 30.86% compared to 2016)

Q5 How did November 2017 footfall compare with November 2016?

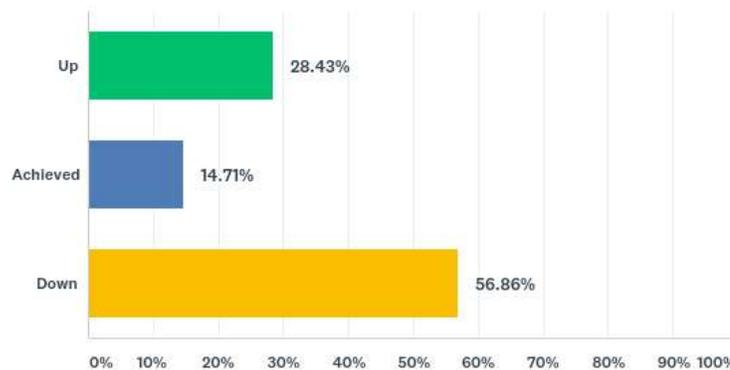


Figure Four: Footfall performance November 2017 against November 2016

2.8 Breaking this down into multiple and independents for November 2017 footfall compared with November 2016:

- 22.58% of multiples were up on footfall
- 37.5% of independents were up on footfall
- 9.6% of multiples achieved their footfall
- 22.5% of independents achieved their footfall
- 67.7% of multiples were down on footfall
- 40% of independents were down on footfall

From the 102 respondents, 34 businesses provided footfall information. The average footfall for November 2016 was **-2.3%**.

2.9 Businesses were asked to rate their sales performance for December 2017 compared with December 2016. Overall;

- 43.14% of businesses were up (which is a decrease of 22.86% on 2016)
- 9% of business achieved (which is the same figure as 2016)
- 47% of business were down (which is an increase of 22% on 2016) on sales for December 2017 against December 2016.

Q6 How did December 2017 sales compare with December 2016?

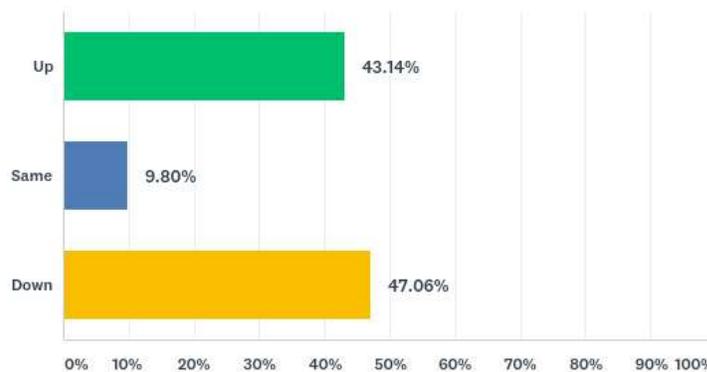


Figure Five: Sales performance December 2017 against December 2016

2.10 Breaking this down further into multiple and independents for sales in December we can see the following:

- 41.9% of multiple retailers were up on sales December 2017 compared to 2016
- 45% of independents were up on sales December 2017 compared to 2016
- 4.8% of multiple retailers stated that sales were the same December 2017 compared to 2016
- 11.2% of independent retailers stated that sales were the same December 2017 compared to 2016
- 53.2% of multiple retailers were down on sales December 2017 compared to 2016
- 37.5% of independents were down on sales December 2017 compared to 2016

From 102 respondents to the survey 56 businesses gave their sales percentage change for December 2017 against December 2016. The average sales for December 2017 was **0.6%**.

2.11 Businesses were asked to rate their sales performance for December 2017 against their sales target for that month. Overall:

- 21.5% of businesses were up (a decrease of 31.5% on 2016)
- 25.4% of businesses achieved (an increase of 2.4% on 2016)
- 43% of businesses were down (an increase of 19% on 2016) and
- 9.8% of businesses chose 'Other'

Q7 Please rate your sales performance for the month of December 2017 against sales target

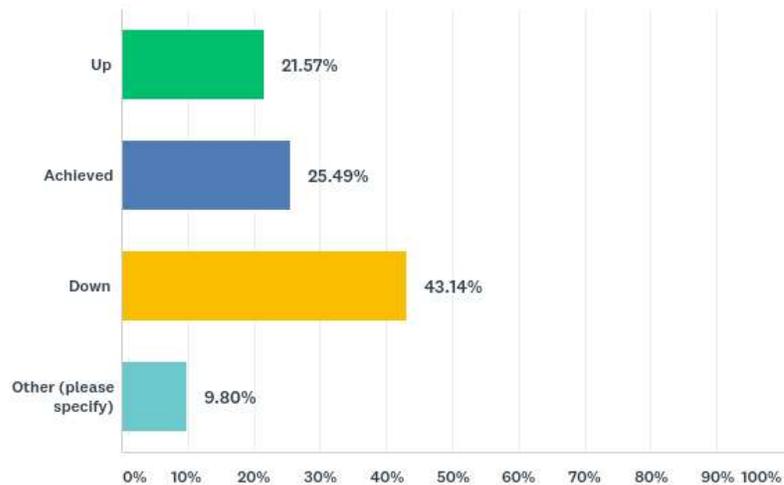


Figure Six: Sales performance December 2017 against target

2.12 Breaking this down further into multiple and independents:

- 58.33% of multiple retailers were up on sales for December 2017 against sales target
- 45% of independents were up on sales for December 2017 against sales target
- 13.33% of multiple retailers achieved sales for December 2017 against sales target
- 37.5% of independent retailers achieved sales for December 2017 against sales target
- 28.34% of multiples were down on sales for December 2017 against sales target
- 17.5% of independents were down on sales for December 2017 against sales target

2.13 The information relating to December sales performance showed that independent businesses performed higher against their sales target than multiple businesses, with 82.5% of independents achieving or increasing against their sales target compared to 71.66% of multiples.

2.14 Businesses were asked to rate their footfall performance for December 2017 compared to December 2016. Overall:

- 25.49% of businesses were up (a decrease of 19.51% on 2016)
- 15.69% of businesses achieved (a decrease of 9.31% on 2016)
- 58.82% of businesses were down (an increase of 28.82% on 2016)

Q8 How did December 2017 footfall compare with December 2016?

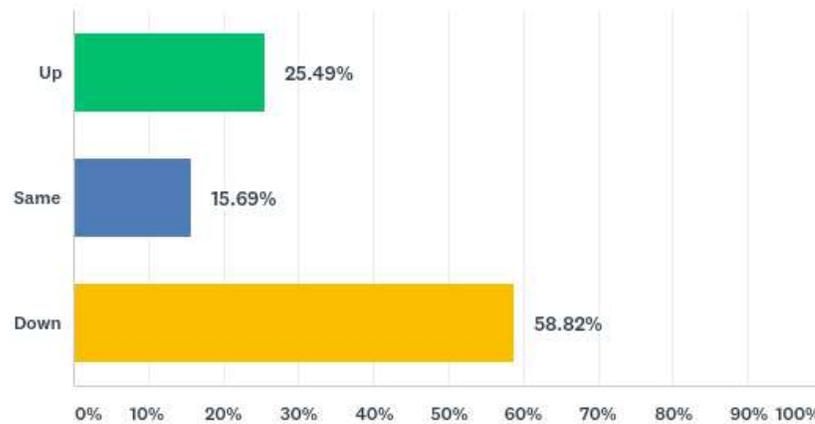


Figure Seven: Footfall performance December 2017 against December 2016

2.15 Breaking this down further into multiple and independents:

- 22.5% of multiple retailers were up on footfall
- 30% of independents were up on footfall
- 8.06% of multiple retailers achieved the same footfall
- 27.5% of independent retailers achieved the same footfall
- 69.35% of multiples were down on footfall
- 42.5% of independents were down on footfall

2.16 From the 102 respondents, 30 businesses provided footfall percentages for December 2017 against December 2016. The average footfall for December 2017 was **-4.5%**.

2.17 Businesses were asked if they opened on Boxing Day. 61.76% of businesses surveyed opened on Boxing Day, which was an increase of 8.76% on 2016.

Q9 Did you open on Boxing Day?

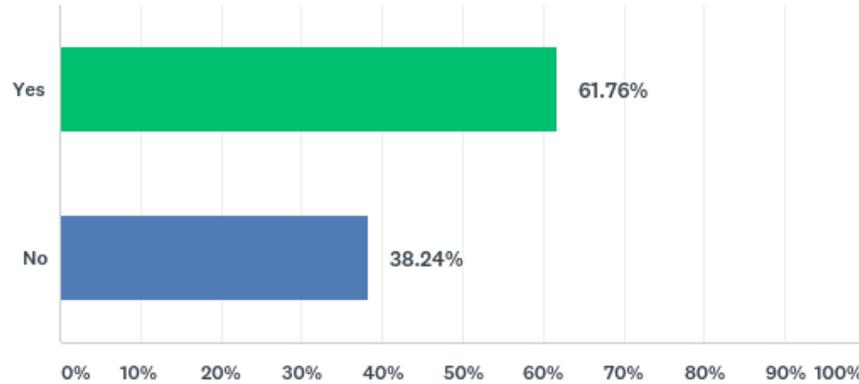


Figure Eight: Boxing Day Businesses Opened

- 2.18 Of the 63 businesses that opened on Boxing Day only 7 were independents.
- 2.19 The businesses that did open on Boxing Day were asked to describe sales performance. (Figure Nine). Of the 61.79% of businesses that did open the breakdown of sales performance is as follows:

Q10 If you opened on Boxing Day how would you describe sales?

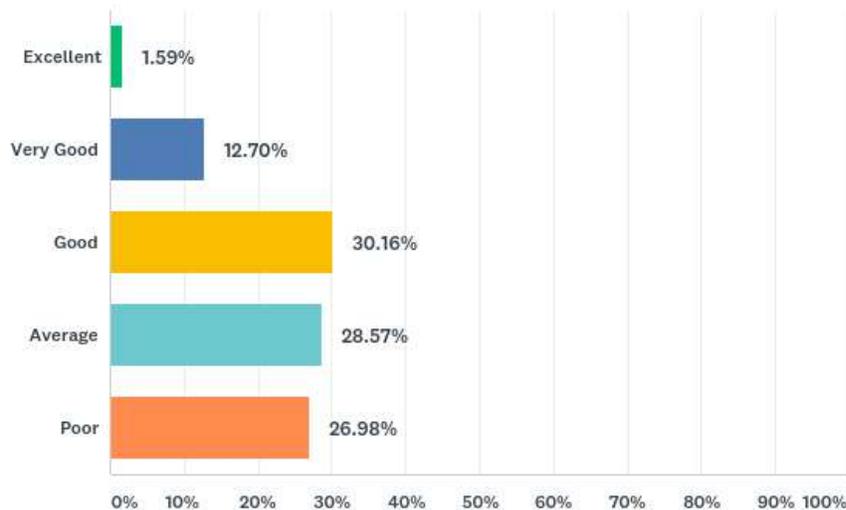


Figure Nine: Boxing Day Sales Performance

- 2.20 Overall the rating of sales on Boxing Day for 'Very Good' and 'Excellent' was 14.29%. Compared to 2016 this is a decrease of 26.45%. There was also an increase in the number of respondents rating Boxing Day sales as 'Average' and 'Poor', an increase of 6.35% rating sales as 'Average' compared to 2016 and an increase of 15.87% of respondents rating sales as 'Poor' from the 2016 survey.
- 2.21 Springboard's data indicated that footfall dropped by 4.5% across the UK in comparison to 2016 with the high street seeing a drop of 5.9% on the previous year. Businesses in Belfast reported that with Boxing Day being on a Tuesday, shoppers did not travel into town until later in the week. Many stores also go into sales pre-Christmas which means that Boxing Day sales were not in high demand.
- 2.22 Businesses were asked if they opened on New Year's Day. 45.10% of businesses surveyed opened on New Year's Day, which is an increase of 5.10% compared to 2016.
- Of the 46 businesses that opened on New Year's Day, 6 were independents.

Q11 Did you open on New Years Day?

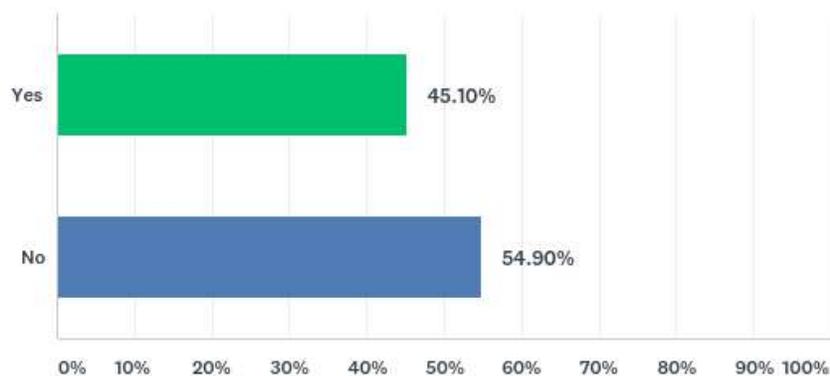


Figure Ten: New Year's Day Businesses Open

- 2.23 The businesses that opened on New Year's Day were asked to describe sales performance on the day. (Figure Ten). Of the 45.10% of businesses that did open, the breakdown of their sales were as follows:
- 69.57% described New Year's Day sales as 'Poor' (a decrease of 4.24% on 2016)
 - 15.22 described sales as 'Average' (an increase of 0.22% on 2016)
 - 10.87% described sales as 'Good' (an increase of 1.35% on 2016)
 - 4.35% described sales as 'Very good' (an increase of 1.97% on 2016)
 - Significantly, no businesses described New Year's Day sales as 'Excellent' which was the same in 2016.

Q12 If you opened on New Years Day how would you describe sales?

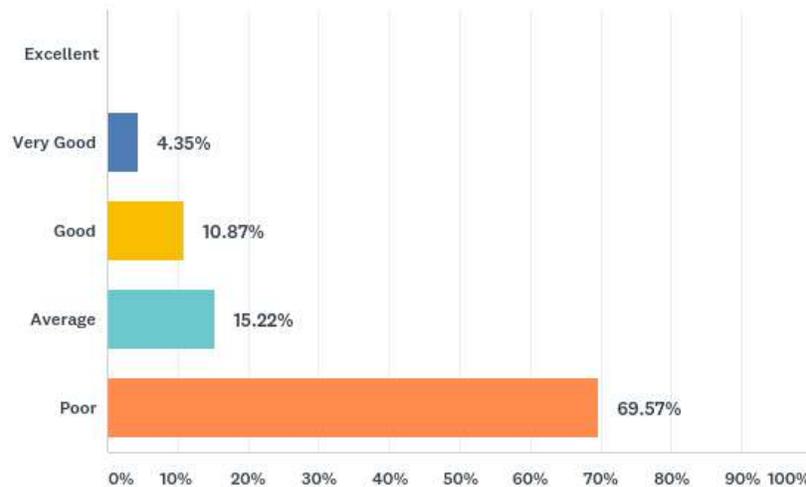


Figure Eleven: New Year's Day Sales Performance

- 2.24 Sales figures on New Year's Day remain mainly poor across the board.
- 2.25 Springboard's post-Christmas review indicates that footfall on New Year's Day 2018 increased by 16.8% on the previous New Year's Day. This is reflected in the slight increase in sales performance for Belfast retailers.
- 2.26 Retailers were asked to provide factors that they believed contributed to their performance in December 2017; from the responses several key factors emerged:
- Poor weather at the beginning of December kept shoppers at home and potentially increased online sales.
 - Black Friday (24th November) pushed sales forward in November.
 - Development works (Castle Street) disrupted footfall in the area.
 - Lower footfall in the city.
 - Cold weather in December helped clothing retailers.
 - Increase in the number of promotions and sales which businesses are offering/businesses in competition with each other in terms of offers.
 - Investment in premises / brand growth / opening of second stores.
 - Christmas market draws additional footfall and day trippers.
 - Businesses raised price points to offset the reduction in city centre footfall.
 - Good products and staff knowledge.
 - Excellent advertising campaigns for the store including social media.
 - Lack of Republic of Ireland shoppers in 2017.
 - Anti-social element of the city centre (on street drinking/begging/drug issues) is off-putting for customers.
 - Issues relating to customers accessing the city centre, bus lanes act as a deterrent.

2.27 Retailers were asked to rate the Christmas lighting in Belfast City Centre (Figure Twelve). BCCM manages, installs and maintains the city's festive lights. However, Belfast City Council is responsible for the lighting within the grounds of City Hall.

The festive lighting scheme is an important part of the Belfast offering at the most important trading time of the year.

Q14 Please rate the Christmas lighting out of 10 (10 being the highest).

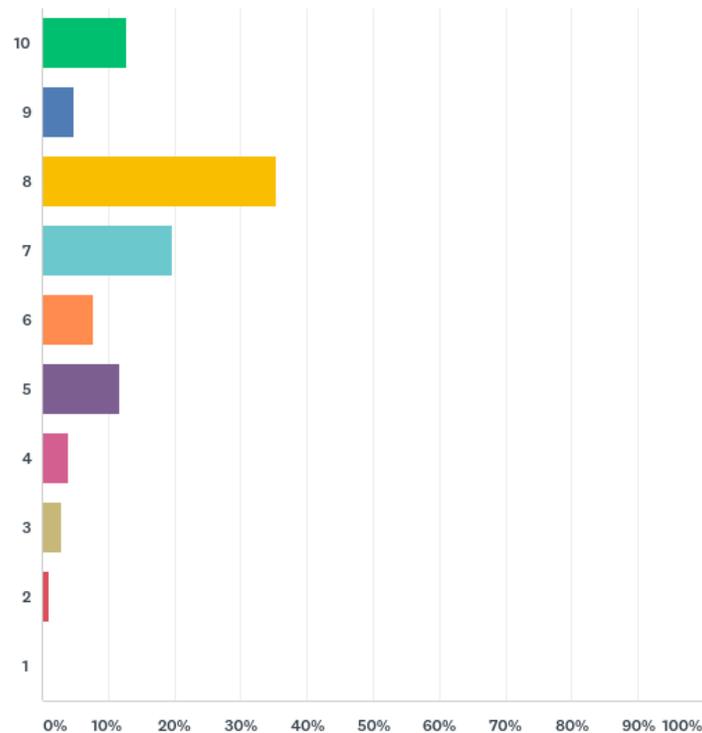


Figure Twelve: Perception/rating of Christmas lighting in the city centre

2.28 BCCM's target key performance indicator (KPI) relating to Christmas lighting is for a satisfaction rating of 8/10. 52.94% of the businesses surveyed gave the lighting a rating of 8 or more (decrease of 10.06% from 2016).

2.29 Retailers were asked if their business benefited from the switch-on event being held on a Saturday evening. The event is held in front of Belfast City Hall and is aimed at families with younger children. The switch-on event took place on Saturday 18th November with children's television characters Bing and Flop, The Twirlywoos, Milkshake Live's Derek and Jen and Cavehill Primary School choir.

The Christmas Market within the grounds of City Hall opened at 12 noon on the 18th November and ran until the 23rd of December.

Q15 Did your business benefit from the Christmas light switch on event being held on a Saturday (Saturday 18th November)?

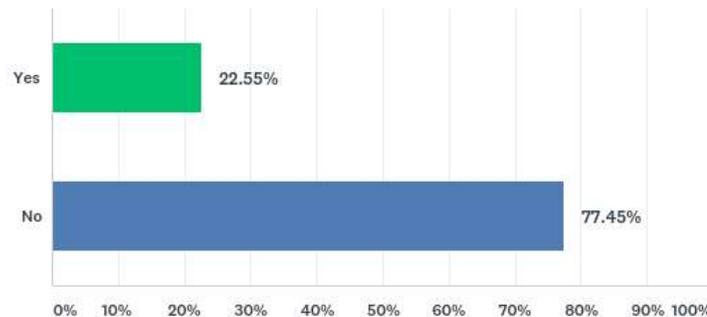


Figure Thirteen: Did businesses benefit from a Saturday switch on event

2.30 77.45% of businesses stated that they did not benefit from the Saturday switch on (a 7.45% increase on 2016).

Breaking this down further into multiples and independents:

- 75.8% of multiples did not benefit from the Saturday switch on
- 80% of independents did not benefit from the Saturday switch on
- 24% of multiples did benefit from the Saturday switch on
- 20% of independents did benefit from the Saturday switch on

2.31 Feedback from some retailers in Victoria Square highlighted that their own switch on event brings extra trade from families into the centre which boosted sales on that day. On the whole, businesses are supportive of the event but see little return in terms of sales on that day.

2.32 Retailers were asked to provide comments about the Christmas light switch on. From the responses received, several key 'themes' emerged:

- Those in the city leave early to avoid the road closures.
- Businesses with the Donegall Place area see a drop in footfall as the road closures kick in and set up for event occurs.
- No retail activity post 4.00/5.00pm.
- Footfall was high in the city and around the event but not in the city centre stores.
- Good family atmosphere.

2.33 Retailers were asked if they saw any of the promotional activity advertising Christmas in Belfast across social media/television/billboard/radio campaigns. Visit Belfast, together with its partners, launched its biggest marketing campaign of the year in mid-November, promoting the very best of Belfast at Christmas. 'Find Your Belfast this Christmas' was a multi-platform campaign which was delivered with support from Belfast Chamber of Trade & Commerce, Belfast One BID, Victoria Square, CastleCourt, Translink and Hastings Hotels, and launched with a Christmas TV advert which ran right through to the New Year. Belfast One also ran their own promotional campaign, 'The Belfast Elves' which aimed to encourage spend in Belfast city centre. A promotional video showcased the retail offering in the city centre and the on-street elves handed out vouchers to city centre shoppers to redeem in businesses within Belfast One. A social media campaign also ran alongside the campaign to encourage shoppers from outside of Belfast to visit.

Q16 Did you see/hear any of the promotional activity for Christmas in Belfast including social media/television/billboard/radio campaigns?

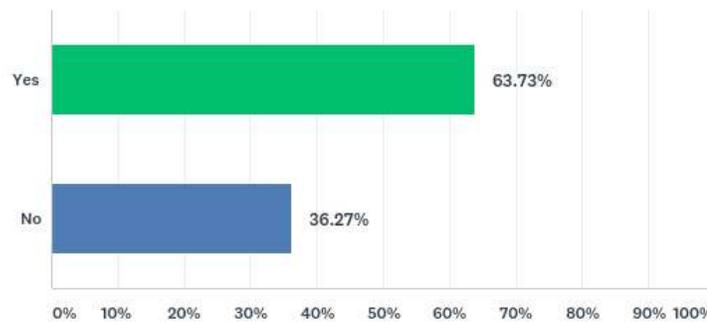


Figure Fourteen: Christmas advertising campaign

2.34 63.75% of businesses surveyed had seen the promotional activity. This is a 3.75% increase from 2016.

2.35 Of the 63.75% of businesses that did see the promotional activity, the breakdown of ratings are as follows:

Q17 If you answered 'yes' to seeing/hearing any promotional activity, how would you rate it?

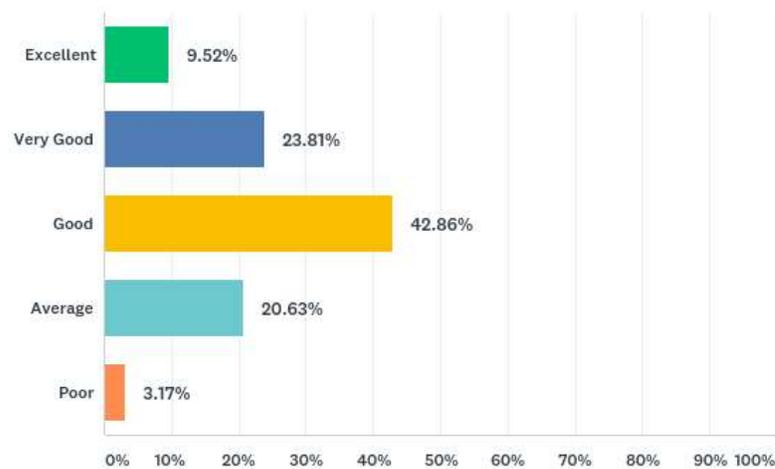


Figure Fifteen: Christmas advertising campaign rating

- 9.52% of businesses surveyed rated the promotional activity as 'Excellent' (an increase of 2.85% on 2016)
- 23.81% of businesses surveyed rated the promotional activity as 'Very Good' (a decrease of 9.52% on 2016)
- 42.86% of businesses surveyed rated the promotional activity as 'Good' (a decrease of 12.14% on 2016)
- 20.63% of businesses surveyed rated the promotional activity as 'Average' (an increase of 15.63% on 2016)
- 3.17% of businesses surveyed rated the promotional activity as 'Poor' (an increase of 3.17% on 2016)

2.36 Overall 76.19% of the businesses surveyed rated the promotional activity as good or above, a decrease of 18.81% on 2016. However, this year businesses reported that they had seen Belfast One's promotional campaign for Christmas including the 'Belfast elves' through social media and were also aware of the reindeer hunt.

2.37 Retailers were asked to rate the footfall and spend of customers from the Republic of Ireland (RoI) (Figures Seventeen and Eighteen). Overall, the breakdown of sales is as follows:

- 7.84% of businesses described RoI sales as 'Very Good', a decrease of 17.16% on 2016
- 29.41% of businesses described RoI sales as 'Good', a decrease of 4.53% on 2016
- 41.18% of businesses described RoI sales as 'Average', an increase of 14.18% on 2016
- 21.57% of businesses described RoI sales as 'Poor', an increase of 7.57% on 2016

Q18 Please rate Republic of Ireland visitors to your business during December 2017 in terms of sales.

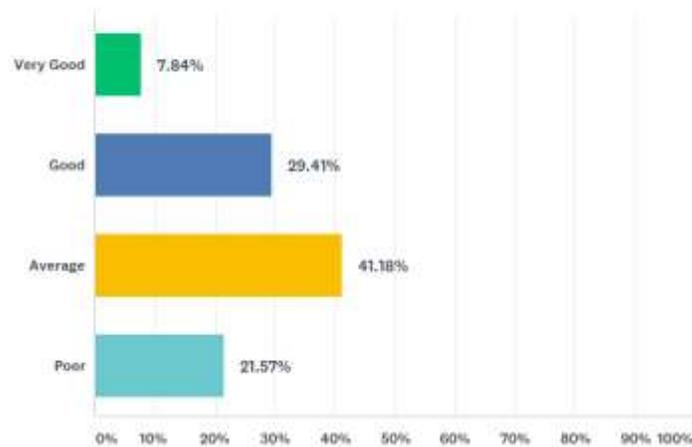


Figure Sixteen: RoI Sales December 2017

2.38 Breaking this down further into multiple and independents:

4.83% of multiples described Republic of Ireland sales as 'Very Good'
12.5% of independents described Republic of Ireland sales as 'Very Good'

33.87% of multiples described Republic of Ireland sales as 'Good'
22.5% of independents described Republic of Ireland sales as 'Good'

38.70% of multiples described Republic of Ireland sales as 'Average'
45% of independents described Republic of Ireland sales as 'Average'

22.58% of multiples described Republic of Ireland sales as 'Poor'
20% of independents described Republic of Ireland sales as 'Poor'

2.39 Footfall from the Republic of Ireland reflected the sales figures. Overall, businesses described footfall from RoI customers as follows:

Q19 Please rate Republic of Ireland visitors to your business during December 2017 in terms of footfall

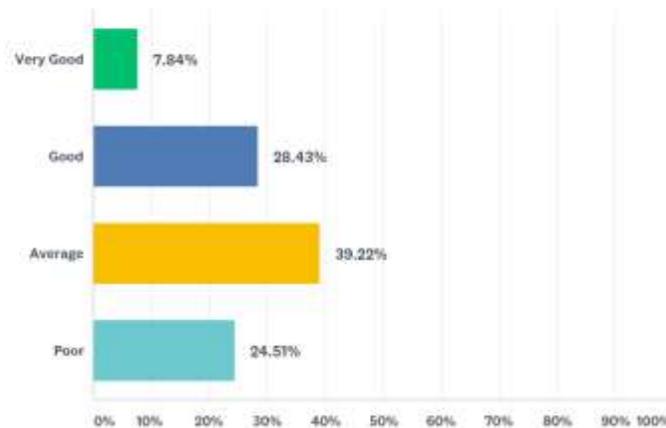


Figure Seventeen: ROI Footfall December 2017

- 7.84% of businesses described ROI footfall as 'Very Good' (a decrease of 10.16% on 2016)
- 28.43% of businesses described ROI footfall as 'Good' (a decrease of 8.57% on 2016)
- 39.22% of businesses described ROI footfall as 'Average' (an increase of 9.22% on 2016)
- 24.51% of businesses described ROI footfall as 'Poor' (an increase of 9.51% on 2016)

2.40 Businesses were then asked how they expected sales to perform in 2018 (Figure Eighteen). Overall 63.73% of businesses expect their sales to increase (an increase of 15.73% on 2016), 27.45% of businesses expect their sales to stay the same (an increase of 14.55% on 2016) and 8.82% of business expect their sales to decline (a decrease of 1.18% on 2016).

Q20 How do you expect your retail sales to perform in 2018?

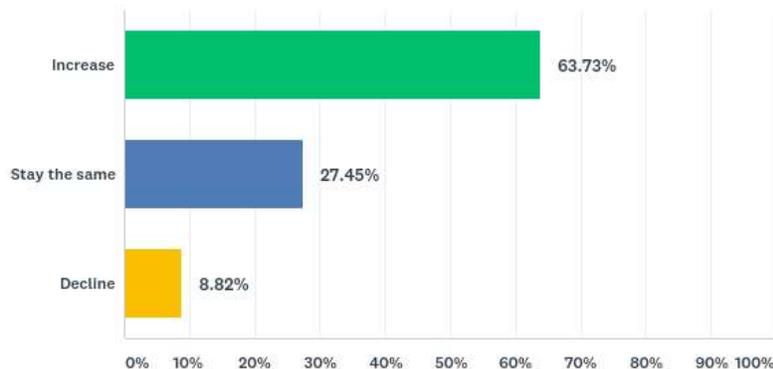


Figure Eighteen: Sales Performance in 2018

2.41 Retailers were asked to provide any further comments in relation retail in Belfast during Christmas 2017.

- The effect of the bus lanes and parking enforcement due to the public's lack of understanding is off-putting for customers. Once they have a bad experience they do not return.
- This year businesses witnessed an upsurge in the number of drug-related incidents and drug related activity on the streets of the city centre.
- Business also witnessed an increase in shoplifting during the Christmas period.
- Business rates need to be more realistic when online sales are increasing at such a rate and both sales and footfall in the city centre are declining.
- Increased car parking promotions at Christmas.
- Low footfall in the city centre.
- The area at the City Hall is always beautifully dressed with Christmas lights and benefits the market traders in November and December – however established businesses in the city centre who pay rates all year round receive a lesser service in terms of Christmas lighting.
- Loud busking and anti-abortion campaigners present in the city at the peak shopping times deters shoppers.
- Christmas marketing requires much more of a retail focus.
- The Christmas policing plans and the additional officers patrolling the city centre was acknowledged by retailers.

3.0 Conclusions

3.1 46.08% of the businesses surveyed did not open in line with the extended Christmas hours for December 2017, which marketed Belfast City Centre as 'open late night all of December'. This is less than in 2016 (15.92% decrease).

3.2 Overall November 2017 sales performed poorly in comparison to 2016 with decreases in the number of businesses reporting that their sales were up or achieved on the previous year. 45% of multiple retailers and 46.66% of independents were up on sales. The average figure for sales in November was 0.6%.

Footfall also saw a reduction in November with a decrease in the number of businesses reporting footfall being up or achieved on the previous year. 67.7% of multiples and 40% of independents were down on footfall. The overall average footfall for November was -2.3%.

Overall December 2017 sales performed poorly in comparison to 2016, with a decrease in the numbers reporting sales as up and an increase in the numbers reporting sales as down in comparison to 2016. 41.9% of multiple retailers were up on sales in December 2017 compared to 2016 and 45% of independents were up on sales in December 2017 compared to 2016. Overall sales in December was 0.6%.

Footfall was similar with decreases in both those businesses reporting that sales were up or achieved and an increase in those stating that footfall was down. Overall, footfall for December was -4.5%

- 3.3 61.76% of businesses surveyed opened on Boxing Day, which is an increase of 8.76% on 2016.
- 3.4 45.10% of businesses surveyed opened on New Year's Day, which is an increase of 5.10% on 2016; 4.35% of businesses reported that sales were 'Very Good' in comparison to 0% in 2016.
- 3.5 BCCM's target key performance indicator (KPI) for the Christmas lighting in the city centre is for a majority satisfaction rating of 8/10. 52.94% of the businesses surveyed gave the lighting a rating of eight or more (decrease of 10.06% from 2016).
- 3.6 77.45% of businesses stated that they did not benefit from the Christmas lights switch on event being held on a Saturday was an increase of 7.45% on 2016.
- 3.7 Sales and footfall from Republic of Ireland visitors declined this year with only 37.25% of businesses describing sales as 'Good' and 'Very good' in comparison to 59% in 2016. Footfall reflected the decline in sales, with 36.27% of businesses describing footfall as 'Good' and 'Very good' in comparison to 55% in 2016.
- 3.8 Overall 63.73% of businesses expect sales to increase in 2018 (compared to 48% when surveyed in 2016). 27.45% expect sales to remain the same (compared to 42% in 2016); and only 8.82% stated that they thought sales may decline (compared to 10% in 2016).

4. Recommendations

- 4.1 There was an increase in 2017 of businesses complying with the advertised opening hours (including 9 independents, compared with none in 2016) which is very positive. Some businesses stated that they trialled late nights in 2017. This is also positive news in light of the reduction in footfall experienced by retailers over the Christmas period. Although the extended late-night opening hours cannot be fulfilled by every business, they are an important advertising tool for the city when it is competing with shopping centres. However, as nearly half (46%) of businesses did not comply with the advertised opening hours, promoting Belfast as being 'open' late night all of December may fall below the expectations of the public. Therefore, the marketing message of Belfast being 'open late night all of December' and the number of businesses complying, should be reviewed ahead of Christmas 2018.
- 4.2 In 2017 there was a reduction in the number of businesses who reported that sales and footfall were up or the same (in comparison to the previous year) and there was an increase in the number of businesses reporting sales as down (in comparison to the previous year). Figures from the Retail Steering Group also indicate that both sales and footfall have been in decline in Belfast City Centre.
In light of the announcement that business rates will increase by 2% this year it would be important that Belfast City Centre Management, who collects this data on a monthly basis, as well as conducting the annual retail sales tracker survey, highlights this issue to Belfast City Council.
- 4.3 Although there was a slight increase in the number of businesses that opened on Boxing Day and also New Year's Day (increase of 8.76% of businesses opening on Boxing Day,

7 of which were independents, and an increase of 5.01% of businesses opening on New Year's Day, 6 of which were independents) sales performance was poor with most stores recording 'Average' or 'Poor' sales. Historically, New Year's Day sales have consistently been underwhelming; however, there was a marginal increase in the number of businesses recording New Year's Day sales as 'Good'/'Very good' and 'Average' and a decrease in those recording sales as 'Poor'. Springboard's findings saw footfall across the UK decrease on Boxing Day by -5.9% on 2016. Springboard's research also indicates that, every year since Black Friday was introduced, footfall has declined by about -6% over the last 3 years. Springboard recorded an increase to 16.8% on New Year's Day, compared to the previous year. However, it is worth noting that in 2016 New Year's Day fell on a Sunday.

- 4.4 This year there were a mix of factors that contributed to sales performance. The snow in the early weeks of December saw sales and footfall drop as shoppers stayed at home and chose to shop online. Most businesses referred to the lack of footfall in the city centre in general and the obvious lack of RoI customers in 2017, with some stores raising price points to offset the reduction in footfall. Feedback from retailers also highlighted that the advertising campaign tended to focus on the hospitality element of Belfast, rather than highlighting the unique shopping experience and wide range of brands. This is something which will be fed back to Visit Belfast and Belfast One, ahead of their marketing plans for Christmas 2018.
- 4.5 Issues with access into Belfast city centre and car parking were again highlighted as obstructions for customers. Lack of understanding and the 'fear' of bus lanes are keeping customers away from the city centre. Retailers have highlighted the need to address the operational times of bus lanes and for more to be done for drivers to access and park in the city centre confidently without the fear of being fined. This issue will be raised at the Public Space Management Action Group and at the next pre-Christmas Traffic Management planning meeting which is due to be held in August. The traffic management meetings are attended by representatives from the Department for Infrastructure, the PSNI, Belfast City Council, Belfast City Centre Management and Translink, to formulate an agreed action plan for the busy Christmas period.
- 4.6 There was positive feedback from businesses who took steps to improve their trading environment and expand their premises. A number of businesses underwent shop refits and opened second stores, which seen the benefits in terms of increased footfall and sales. Other businesses reported how they undertook online advertising via social media to improve their brand awareness which in turn boosted sales and footfall.
- 4.7 Businesses generally do not benefit from the Christmas light switch-on event (Saturday 18th November in 2017) as trade drops off from 4.00pm and people avoid the city centre from this time. However, the free event is still well received by businesses as it creates a positive family experience.
- 4.8 There was a reduction in the rating the city centre Christmas lighting being rated as 8 or more out of 10 (decrease of 10.06% on 2016). Much of the current stock is around 10 years old so there is little variation in what is installed annually. Belfast City Centre Management has set up a working group to review the current stock and explore the possibilities for new decorations, ahead of Christmas 2018.
- 4.9 The survey highlighted the decrease in shoppers to Belfast from the Republic of Ireland, compared to previous years. The collapse in the strength of sterling did not entice shoppers

to travel as far as Belfast City Centre; however, border shopping towns such as Newry experienced an increase in the numbers of RoI customers. More work is required in relation to advertising the shopping experience of Belfast to RoI customers; it is important that both the hospitality and also the retail experience of Belfast is highlighted in future advertising campaigns.

- 4.10 Over 63% of businesses expect sales in 2018 to increase. This optimism may be linked to several new hotels and student accommodation buildings due to open in Belfast City Centre in during the year; and reputable travel guide Lonely Planet has rated Belfast and the Causeway Coast in Northern Ireland as the best region in the world to visit in 2018.

Appendix One: List of Surveyed Businesses

Business	Street
Aldo	Donegall Place
Andrew Watson Menswear	Upper Queen Street
Ann Summers	Rosemary Street
Avoca	Arthur Street
Beaverbrooks	Donegall Place
Body Shop	Donegall Place
Boots The Chemist	Donegall Place
Boots the Chemist	Great Northern Mall
Bravissimo	Royal Avenue
Build-A-Bear	Victoria Square
Carphone Warehouse	Arthur Square
Carrolls Irish Gifts and Souvenirs	Castle Place
Carrolls Irish Gifts and Souvenirs	Donegall Place
Centra	Great Victoria Street
Chef Shop	Bruce Street
Clarks Shoes	Donegall Place
Co Couture	Chichester Street
Comic Book Guys	Great Victoria Street
Cotswold Outdoor	Castle Lane
Dawsons Music	Royal Avenue
Debenhams	Royal Avenue
Discover Outdoors	College Square East
DV8	Castle Place
DW Sports	Donegall Place
Eason	Donegall Place
Ecco	Castle Lane
Electronic Centre	College Square East
Ellison's Jewellers	College Street
The Entertainer	CastleCourt
Envoy of Belfast	Wellington Street
Ernest Jones	Donegall Place
Evans	CastleCourt
First Class	Great Northern Mall
Flying Tiger Copenhagen	Castle Lane
Foot Factory	Wellington Place
Foot Locker	Donegall Place
Fossil	Victoria Square
Fred J Malcolm Ltd	Chichester Street

Fresh Garbage	Rosemary Street
Gap	Donegall Place
Gordons Chemist	Castle Street
Hallmark	College Street
Hawkins Bazaar	CastleCourt
HMV	Castle Place
Hotel Chocolat	William Street South
Hotter	Arthur Square
Jack & Jones	Arthur Square
Jack & Jones	CastleCourt
Jack Wills	Arthur Street
Jackson Sports	High Street
Jigsaw	Arthur Street
Joules	Arthur Street
Kavanagh's Engravers	Gresham Street
Kiehls	Victoria Square
Kurt Geiger	Victoria Square
Learning Space	College Street
Liverpool FC Store	Castle Lane
L'Occitane	Ann Street
Lush	Castle Lane
Mace	Donegall Square East
Medicare	Howard Street
Misstique	Gresham Street
Molton Brown	Donegall Square North
Nora Bradley	Howard Street
North Clothing	Howard Street
Paperchase	Arthur Street
Primark	Castle Place
Pure Running	Wellington Place
Quiz	CastleCourt
Rail News	Great Northern Mall
Rio Brazil	Victoria Square
Rituals	Victoria Square
River Island	Donegall Place
River Island	Victoria Square
Sally Salon Services	Queen Street
Sandwich Station	Great Victoria Street
Sheldon Gallery	Donegall Square East
Size?	Upper Queen Street
Skechers	Donegall Place

Sony Centre	Great Victoria Street
Space NK	Donegall Square North
Steensons Jewellers	Bedford Street
Stradivarius	Donegall Place
Sunflower Public House	Union Street
Superdrug	Ann Street
Superdrug	CastleCourt
Taylor's Supershop	Great Northern Mall
Ted Baker	Victoria Square
Thorntons	Cornmarket
TK Maxx	Castle Place
Toys R Us	CastleCourt
Trespass	Arthur Street
Urban Outfitters	Victoria Square
Urban Pharmacy	Dublin Road
Utopia	College Street
Victoria Square	Victoria Square
Visit Belfast Welcome Centre	Donegall Square North
Warhammer	Wellington Place
WH Smith	Great Victoria Street
White Stuff	Arthur Square
The Wicker Man	High Street
Wine Flair	Amelia Street

Appendix Two: Advertised Christmas Opening Hours

						
Belfast City Centre - Advertised Christmas & New Year Opening Hours						
<p>* Significant dates & extended hours:</p> <p>Late night shopping hours: RED - to 9pm GREEN - to 10pm</p> <p>Sundays: Stores with floor space of LESS than 280sq metres can extend their opening hours on Sundays</p>		<p>Fri 10th Nov: Santa arrives at Victoria Square Sat 18th Nov: Santa arrives at CastleCourt Sat 18th Nov-Sat 23rd Dec: Christmas Market Sat 18th Nov: City Centre Switch-on event Fri 24th Nov: Black Friday Sat 2nd Dec: Small Business Saturday</p>				
November 2017						
Mon 6th 9am - 6pm	Tue 7th 9am - 6pm	Wed 8th 9am - 6pm	Thur 9th 9am - 9pm	Fri 10th 9am - 6pm*	Sat 11th 9am - 6pm	Sun 12th 1pm - 6pm
Mon 13th 9am - 6pm	Tue 14th 9am - 6pm	Wed 15th 9am - 6pm	Thur 16th 9am - 9pm	Fri 17th 9am - 6pm	Sat 18th 9am - 7pm* Switch-on	Sun 19th 1pm - 6pm
Mon 20th 9am - 6pm	Tue 21st 9am - 6pm	Wed 22nd 9am - 6pm	Thur 23rd 9am - 9pm	Fri 24th 9am - 9pm Black Friday	Sat 25th 9am - 6pm	Sun 26th 1pm - 6pm
December 2017						
Mon 27th 9am - 6pm	Tue 28th 9am - 6pm	Wed 29th 9am - 6pm	Thur 30th 9am - 9pm	Fri 1st 9am - 9pm	Sat 2nd 9am - 6pm* Small Biz Sat	Sun 3rd 1pm - 6pm
Mon 4th 9am - 9pm	Tue 5th 9am - 9pm	Wed 6th 9am - 9pm	Thur 7th 9am - 9pm	Fri 8th 9am - 9pm	Sat 9th 9am - 6pm	Sun 10th 1pm - 6pm
Mon 11th 9am - 10pm	Tue 12th 9am - 10pm	Wed 13th 9am - 10pm	Thur 14th 9am - 10pm	Fri 15th 9am - 10pm	Sat 16th 9am - 7pm*	Sun 17th 1pm - 6pm
Mon 18th 9am - 10pm	Tue 19th 9am - 10pm	Wed 20th 9am - 10pm	Thur 21st 9am - 10pm	Fri 22nd 9am - 10pm	Sat 23rd 9am - 7pm*	Sun 24th 1pm - 6pm Xmas Eve
Mon 25th Closed Xmas Day	Tue 26th 9am - 6pm Boxing Day	Wed 27th 9am - 6pm	Thur 28th 9am - 9pm	Fri 29th 9am - 6pm	Sat 30th 9am - 6pm	Sun 31st 1pm - 6pm NY Eve
January 2018						
Mon 1st 1pm - 5pm NY Day	Tues 2nd 9am - 6pm	Wed 3rd 9am - 6pm	Thur 4th 9am - 9pm	Fri 5th 9am - 6pm	Sat 6th 9am - 6pm	Sun 7th 1pm - 6pm