Edinburgh's Retail Survey 2015

EDINBVRGH
YOUR COUNCIL – YOUR CAPITAL

Key findings of the Edinburgh Retail Survey 2015

Citywide

- Total floorspace increased over the period 1986 to 2015 by 41% to 1.55 million sq. m.
- Total number of shop units has fallen by 4% to 7,103.
- Substantial reduction in number of retail units being lost to other uses, from 444 in 2010 to 88 in 2015.
- Fall in proportion of shops in active retail use from 49% to 37%.
- Vacancy rate relatively stable at between 9% and 11% in the period 1986 to 2015.
- Average shop size increased from 148 to 218 sq. m.
- 50% increase in number of served food, fitness, charity, mobile phone, coffee estate agent, undertakers, health, chemists / opticians and hair and beauty outlets.
- 50% decrease in DIY, photographic, pet supplies, rental/hire, dry cleaners, launderette, butcher, fishmonger and grocer outlets.

City centre

- Dominated by comparison retail (65% of floorspace).
- 46% of shop units are occupied by non-retail.
- Lowest vacancy rate (3% of floorspace) of all centres in retail network.

Town centres

- Most balanced distribution of floorspace use in the retail network.
- Over half (52%) of the shop units are in non-retail use.

Commercial centres

- Over two-thirds (68%) of floorspace devoted to comparison retail.
- Lowest level (6% floorspace) of non-retail use.
- Highest average shop size (796 sq. m.).

Local centres

- Predominately non-retail uses (58% units, 41% floorspace).
- Highest proportion of convenience floorspace (37%) in retail network.

Neighbourhood shops

- Highest proportion of non-retail units (59%) in retail network.
- Highest vacancy rate (13% floorspace and units).

Contents

1.0 Introduction

1.1 This report provides analyses of shop occupancy and usage in defined shopping centres within Edinburgh in 2015 and over the last 29 years. Retailing is a key use in the city centre and a large number of other centres throughout the city. The analysis will be used to inform retail policy development, retail impact assessment and regeneration initiatives in town and local centres.

2.0 Survey coverage and report structure

Time series

2.1 The Edinburgh shop survey was first carried out in 1986. This was a comprehensive survey of all shop units in the city, including details of occupiers, usage categories, floor space and other information. It was updated in 1996, 2004, 2010 and the latest update was completed in Autumn 2015.

2.2 The survey provides a snapshot of shop occupancy within defined centres. It provides detail of the amount, type and location of retail provision throughout the city, and how this has changed over time.

Geography

2.3 The survey focuses on provision in the city centre, town centres, commercial centres, local centres and neighbourhood shop groups. The boundaries for the 2015 survey differ from previous surveys. It is accepted that this will lead to discontinuities in the time series information at a sub-city level. However, the main purpose of the survey is to provide data to support the development of planning policy.

2.4 The distribution of retail in Edinburgh has changed markedly since 1986 and it is important that the geographies used relate to the situation ‘on the ground’. The area assessments in this report will therefore concentrate on analysing the 2015 data and developing baseline information for comparison with future surveys.

Unit type

2.5 The survey covers all commercial ‘shop type’ premises which were originally built for the sale of goods or services to the general public, including public houses, banks and similar ancillary uses, but not civic or community uses such as libraries, churches, halls and Council offices. It includes units that were originally built for retail use but have been converted to other uses with limited or no public access.

2.6 Away from traditional shopping streets, the survey also includes more recent formats such as supermarkets, superstores, retail warehouse, and trade showrooms. Membership-only cash and carries/trade discount stores are not included.

Use of retail units

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

- Comparison retail is the sale of goods which the purchaser will compare on the basis of price, quantity and quality before a purchase is made e.g. clothes, gifts, electrical goods and furniture.

- Convenience retail is broadly defined as food shopping, drinks, tobacco, newspapers, magazines and confectionery purchased regularly for relatively immediate consumption.

- Non-retail units are those which are not used for the sale of retail goods and include services such as banks, hairdressers, restaurants and pubs.

- Vacant units are unoccupied and include those which are under refurbishment.

2.8 All shop units have been classified using the Retail Inquiry Classification (Appendix 4) and by Use Class, as defined in the Use Classes Order 1997 which forms the basis for planning policy. The Order defines shops and other services for the purpose of identifying a material change of use requiring planning consent.

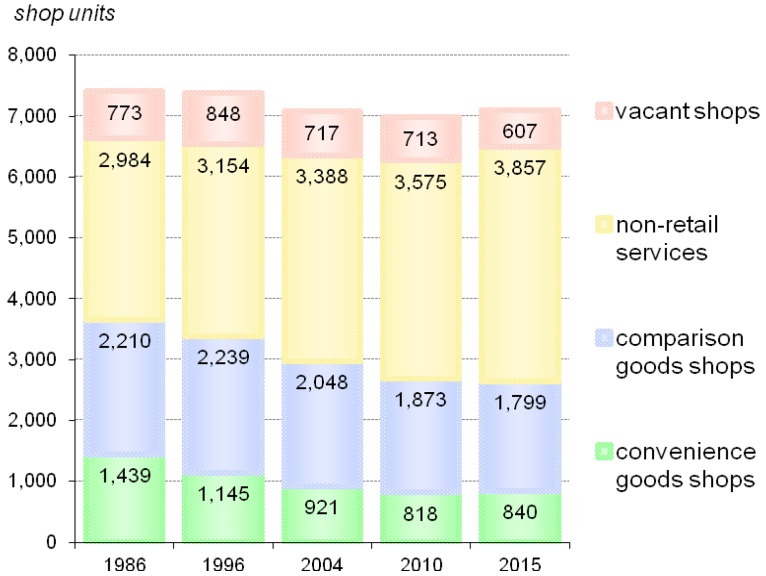
2.9 The retail survey records an enormous amount of information. The report attempts to summarise this in a readable form. Additional information is contained in the appendices and is available by request to the Strategic Planning Policy Team.

Leith Walk

3.0 Summary of key findings city wide

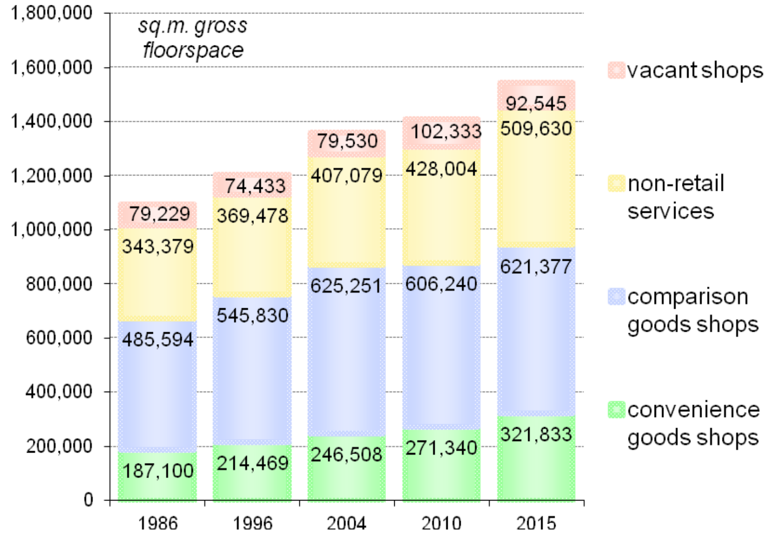
3.1 There were 7,103 shop units recorded in Edinburgh in 2015. Non-retail services accounted for 3,857 of the units, 1,799 units were in comparison retail use, 840 were in convenience retail use and 607 units were vacant.

Graph 1 – composition of shop units by use 1986-2015



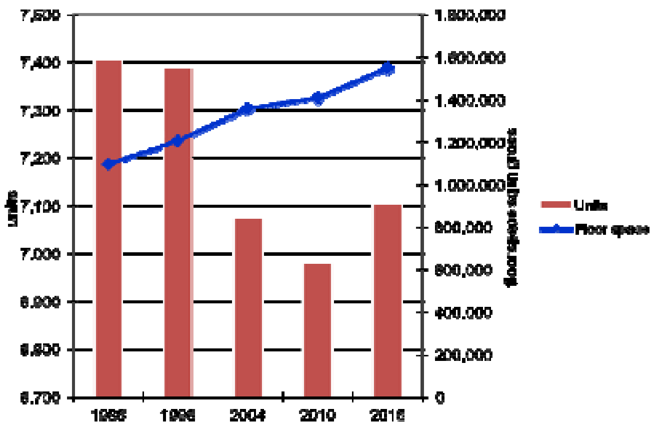
3.2 There was 1,545,385 sq. m. of floorspace recorded in 2015. 621,377 sq. m. was in use for comparison retail, 321,833 sq. m. in convenience use, 509,630 sq. m. in non-retail and 92,545 sq. m. was vacant.

Graph 2 – composition of floorspace by use 1986-2015



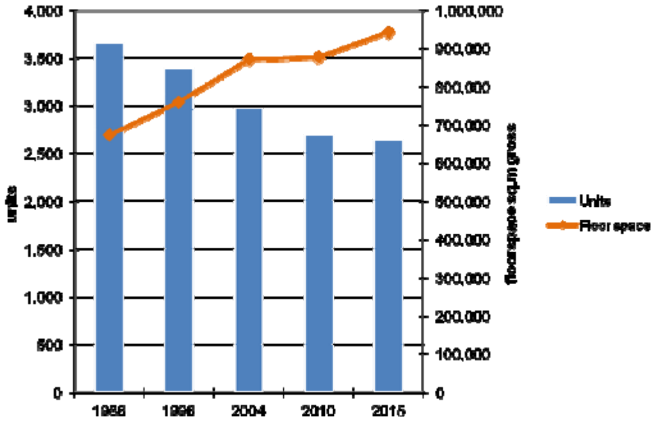
3.3 There has been a degree of change since 1986 in terms of both floorspace and units. While total floorspace of shop units has increased by 41% the total number of shop units has fallen by 4%. The number of units in active retail use (comparison + convenience) has also fallen by 24% as shop units are increasingly in use for non-retail services.

Graph 3 – units and floorspace 1986-2015



3.4 In contrast to the fall in number of units the amount of floorspace in retail use has risen indicating fewer, but larger, retail units. 943,210 sq. m of active retail floorspace existed in 2015. This is an increase of 29% since 1986.

Graph 4 – units and floorspace in active retail use 1986-2015



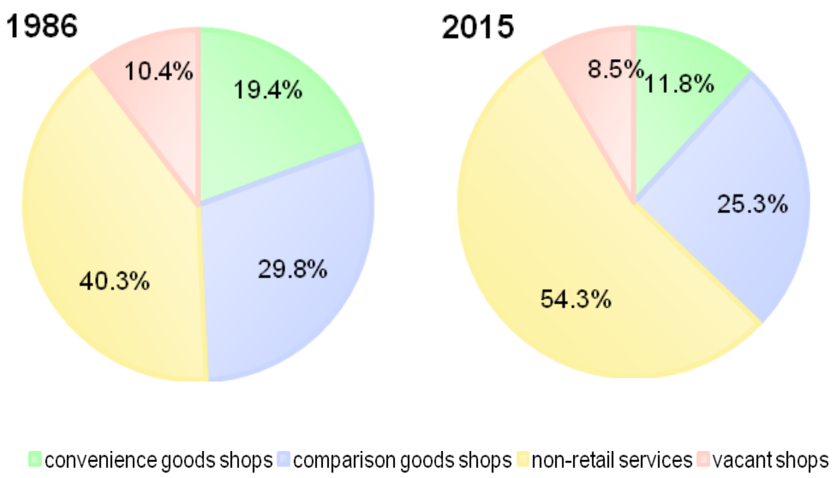
3.5 The amount of comparison floorspace in the city has increased by 22% since 1986. The number of comparison units fell by 19%. The amount of convenience floorspace has increased by 72% from 187,100 sq. m. gross in 1986 to 321,833 sq. m. gross in 2015. In contrast the number of convenience units fell 41 % from 1,439 to 840.

3.6 The balance of use of units in the city indicates more service oriented centres than in 1986. Only 37% of shops were in active retail use at 2015 compared with 49% in 1986. The proportion of units in convenience and comparison use fell as non-retail services took up more of the city's shop units.

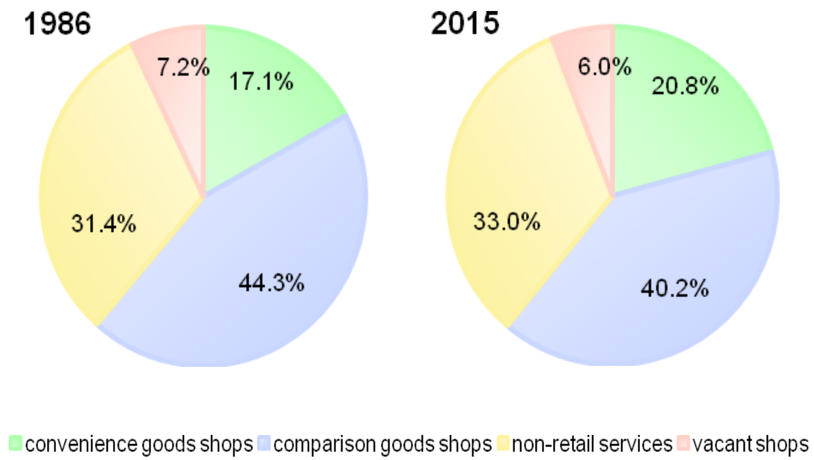
3.7 In 2015 the proportion of the city's units and floorspace in comparison use were at their lowest levels of 25% and 40% respectively.

3.8 Although convenience retailing now accounts for a declining proportion of shop units, its share of floor space has grown from 17% in 1986 to 21% in 2015, reflecting the increased number and size of supermarkets.

Graph 5 - trends in composition of shop units by broad usage categories 1986-2015



Graph 6 - trends in composition of floorspace by broad usage categories 1986-2015



3.9 The increasing proportion of consumer spending devoted to services such as travel, leisure, eating out, health, fitness and personal care has resulted in a significant shift in the composition of many of Edinburgh's traditional shopping centres.

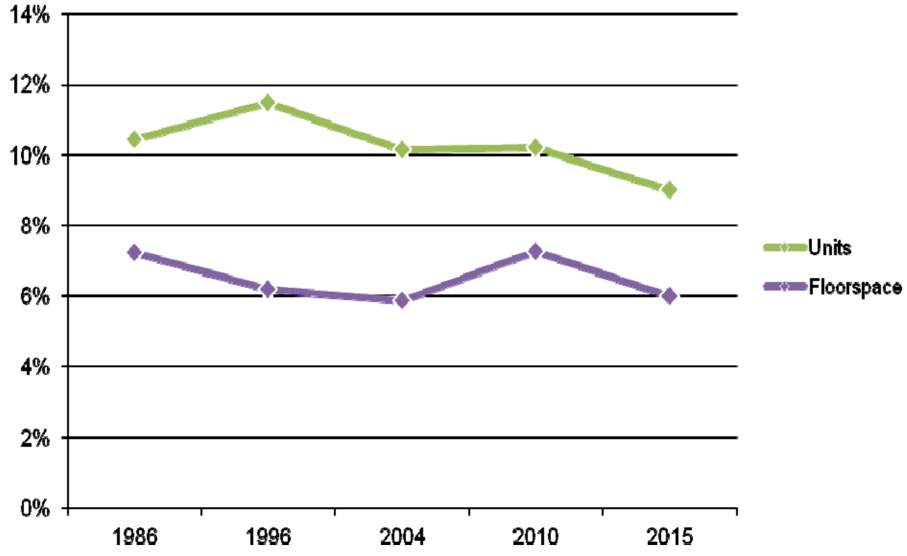
3.10 Non-retail floorspace has increased by 48% and the number of units by 29% over the last 29 years. Non-retail use accounted for 54% of the city's shop units in 2015, an increase from 40% in 1986.

3.11 The proportion of total floorspace in non-retail use was relatively unchanged over the period at around 30-33%. This reflects the overall increase in floorspace and units rather than a change in balance of total floorspace in the city.

3.12 The citywide unit vacancy rate has remained relatively stable between 9% and 11%. At 2015 the vacancy rate was 9%. The proportion of vacant floorspace varied only slightly in the period.

Bruntsfield

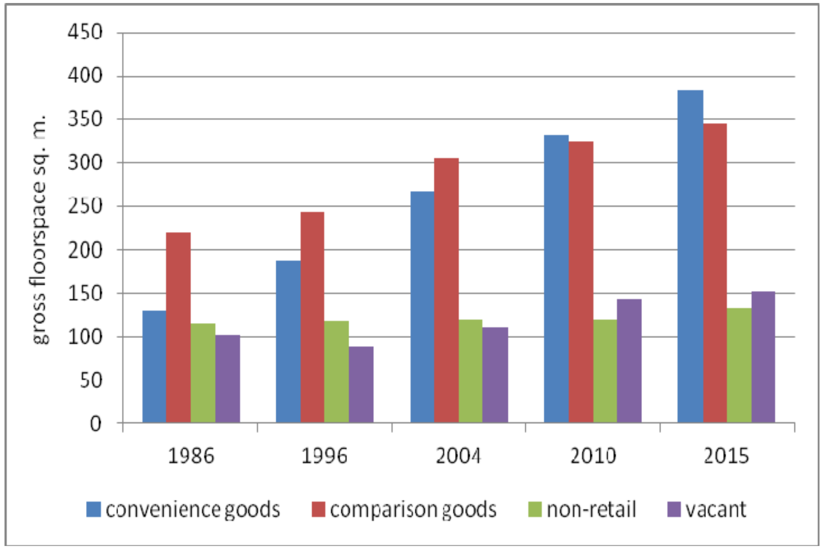
Graph 7 – vacancy rates by unit and floorspace 1986-2015



3.13 Average floorspace of shop units increased over the survey period from 148 sq. m. to 218 sq. m. gross. Convenience units experienced the greatest increase over the period, increasing by 195% to 383 sq. m. gross in 2015. The growth of supermarkets was largely responsible for this increase. Average size of comparison stores rose, although not on the same scale as convenience stores. Comparison units increased by 57% to 345 sq. m. gross.

3.14 The last 29 years has seen a substantial growth in Edinburgh's commercial centres. Largely made up of comparison floorspace these formats tend to have larger units which may have contributed to the increase in average comparison unit size. Small units may also have been lost from comparison use in the smaller centres causing the average size to increase. There was an increase of 15% in the size of units in non-retail use and a 49% increase in vacant unit average size.

Graph 8 - trends in average shop size 1986-2015 by usage



4.0 Retail network summary: distribution of shop units and floorspace

4.1 Edinburgh is served by a network of shopping centres. While the centres vary considerably within the network, at each level, they share general characteristics and functions. The network consists of:

Edinburgh City Centre

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

Town Centres

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

Commercial Centre

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

Local Centres

4.5 Local centres in Edinburgh vary in size. The Second Proposed Local Development Plan identifies 59 local centres. Some centres are anchored by supermarkets and provide a range of shopping, whilst others provide only a basic level of convenience shopping. Centres range in size from 1 unit to 123 units. The average is 21 units and the median is 17.

Neighbourhood Shop Groups

4.6 Neighbourhood shop groups are small groupings of shops which generally serve a small area. 113 neighbourhood shop groups were surveyed. Groups vary in size from 1 to 35 units.

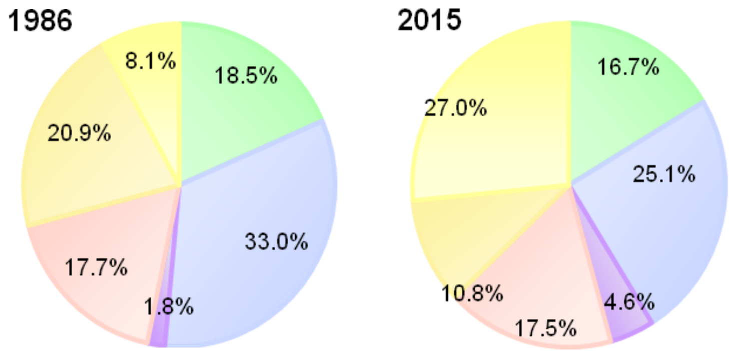
Isolated Shops

4.7 Shops which are not part of any defined centre.

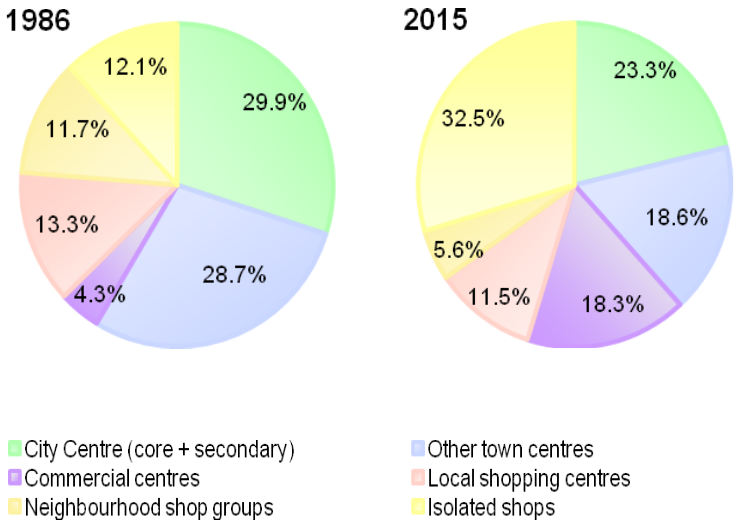
4.8 Maps of the centres are included in Appendix 1.

4.9 Care must be taken when assessing trends in retail distribution because, as outlined at 2.3 above, shopping centre boundaries have changed in the 2015 survey.

Graph 9 - location of shop units by position in network 1986-2015



Graph 10 – floorspace by position in network 1986-2015



4.10 The period 1986-2010 saw the distribution of shop units shifting away from local and town centres towards commercial centres and the city centre. However, the 2015 survey shows a reduction or stabilisation in all sectors except for isolated shops, which more than tripled in proportion. These changes are directly attributable to the changes in shopping centre boundaries. Likewise, the changes in floorspace distribution are also attributable to boundary changes.

4.11 The most notable trend, boundary changes notwithstanding, is the growth of floorspace in commercial centres. This has increased from 4.3% of the total in 1986 to 18.3% in 2015, reflecting the shift in favour of ‘out of town’ shopping over the past 30 years.

5.0 Retail network summary: composition of shop units and floorspace

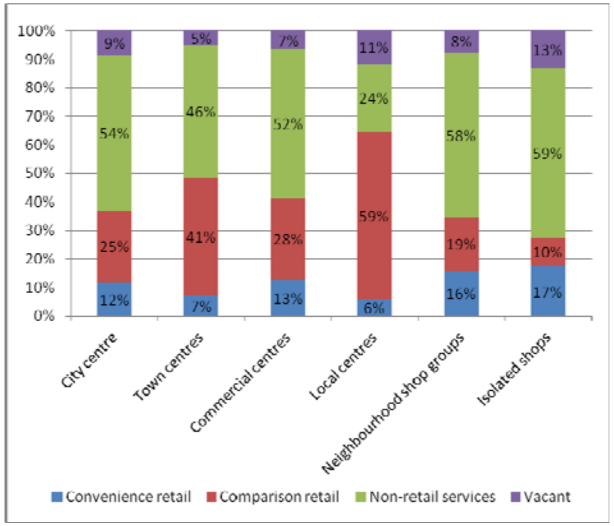
5.1 The different types of shopping centres have different compositions, reflecting the varying geographies and markets they serve.

5.2 Local centres have the largest proportion of units in ‘active retail’ use (convenience retail + comparison retail) in 2015 with 65%, followed by town centres (48%), commercial centres (41%) and the city centre (37%).

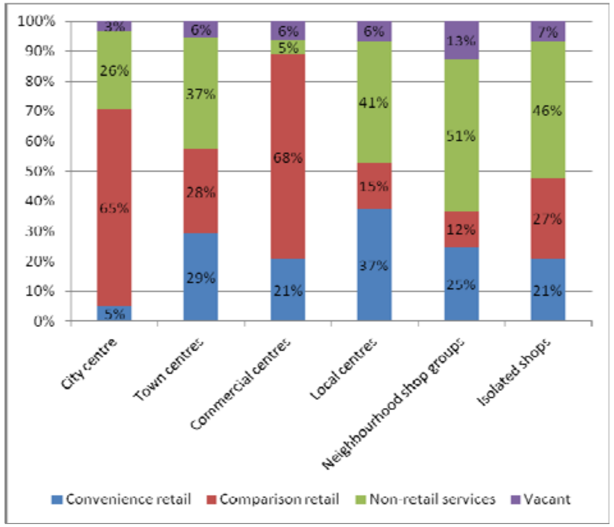
5.3 However, the centres with the largest proportion of floorspace in active retail use are commercial centres (89%), the city centre (70%), town centres (57%) and local centres (52%).

5.4 These differing proportions of units and floorspace reflect the longstanding trend towards fewer, larger stores by larger operators.

Graph 11 – shop unit usage by type of centre



Graph 12 – floorspace usage by type of centre



6.0 Shop use by retail classification

6.1 Retailing has changed substantially over the past 30 years. Stores are open longer and are of a greater variety. The growth of one stop shopping means that supermarkets now offer products and services far beyond their core food product. Whilst supermarkets have grown larger as a result of this trend, they have also expanded into smaller formats in town and city centres. This has sometimes been at the expense of smaller food retailers.

6.2 The Retail Survey records the type of goods sold within each shop unit. The distinct retail classifications are detailed in Appendix 4.

6.3 The trends identified in the 2010 survey have generally been maintained.

Table 1 – changes in types of retail use 1986-2015

number of units	
50%+ increase	50%+ decrease
served food	DIY
fitness	photographic
charity shops	pets/pet supplies
mobile phone shops	rental/hire
coffee shops	dry cleaners
estate agents	launderette
undertakers	butcher
health	fishmonger
chemists/opticians	greengrocer
hair & beauty	

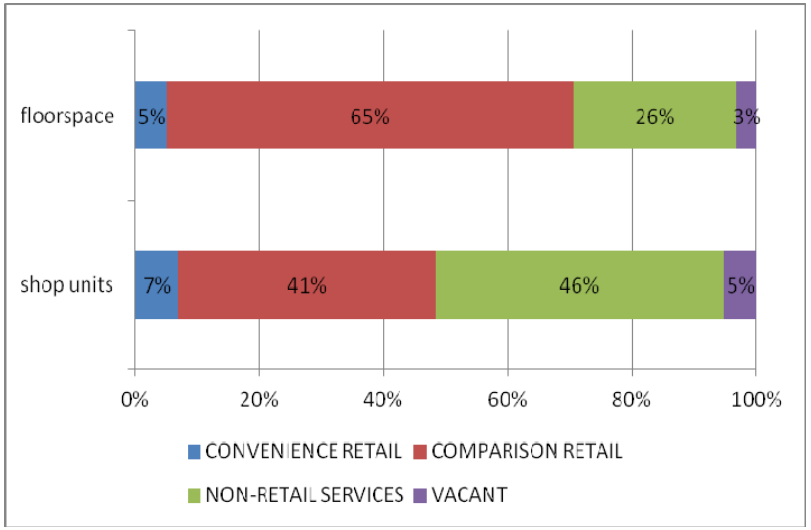
6.4 There are a number of factors that are not immediately apparent from Table 1 above. Whilst the number of DIY shops has decreased by more than 50%, total floorspace has increased by 31%. This trend towards larger stores is also evident in general clothing, ladies and children's clothing, electrical goods, betting shops and books.

6.5 A new type of retail not previously recorded is e-cigarettes. This is currently categorised under newsagents and tobacconists. However, 21 e-cigarette, or 'vape', shops have opened since 2010.

7.0 Focus – city centre

shop units	floorspace (sq. m.)	average shop size (sq. m.)
1,166	328,228	281

Chart 13 – composition of shop units and floorspace

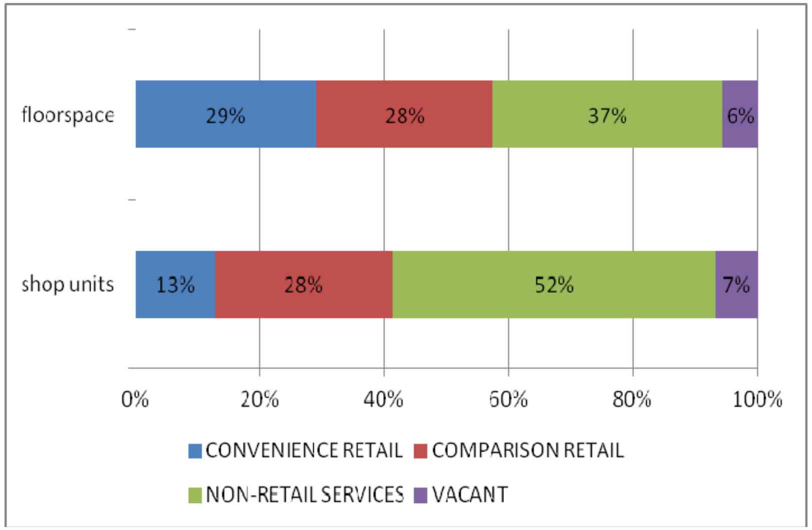


7.1 The dominant unit use in the city centre is comparison retail. The floorspace use of 65% compares with a citywide figure of 40%. Conversely, the convenience retail figure of 6% compares to a citywide figure of 21%. These contrasts are to be expected. City centre retailing is based on 'destination shopping' with a regional catchment rather than supporting a local community through convenience retail.

8.0 Focus – town centres

shop units	floorspace (sq. m.)	average shop size (sq. m.)
1,755	261,883	149

Chart 14 – composition of shop units and floorspace

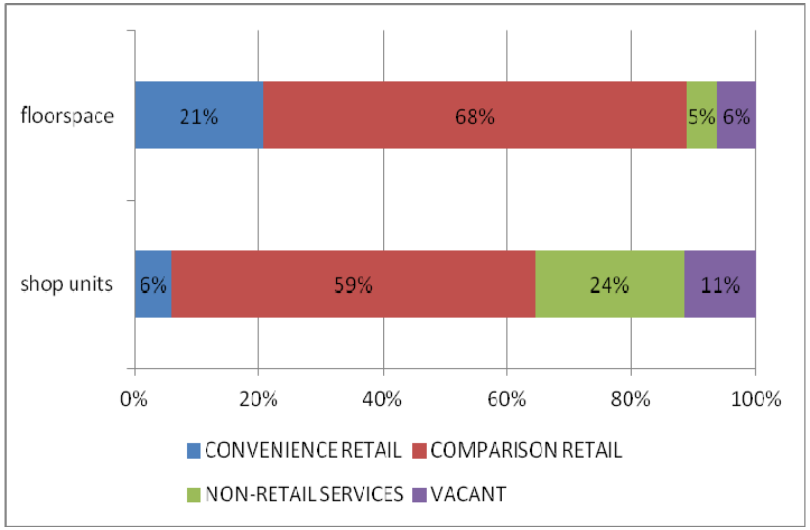


8.1 Edinburgh's town centres display a relatively even spread of retail types with floorspace distribution of 29% convenience, 28% comparison and 37% non-retail. There is variation between individual town centres but this spread is generally replicated. It reflects the multifunctional purpose of town centres in meeting the needs of their local communities.

9.0 Focus – commercial centres

shop units	floorspace (sq. m.)	average shop size (sq. m.)
324	257,851	796

Chart 15 – composition of shop units and floorspace

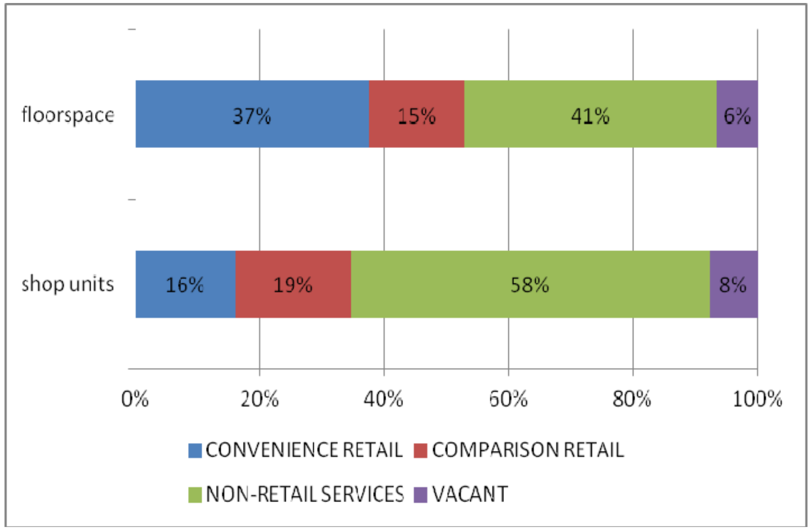


9.1 Commercial centres are dominated by comparison units and floorspace, with over two-thirds of total floorspace dedicated to this retail type compared to 25% citywide. There is often a focus on bulky or white goods, reflecting the car-centred nature of these centres.

10.0 Focus – local centres

shop units	floorspace (sq. m.)	average shop size (sq. m.)
1,224	161,945	132

Chart 16 – composition of shop units and floorspace



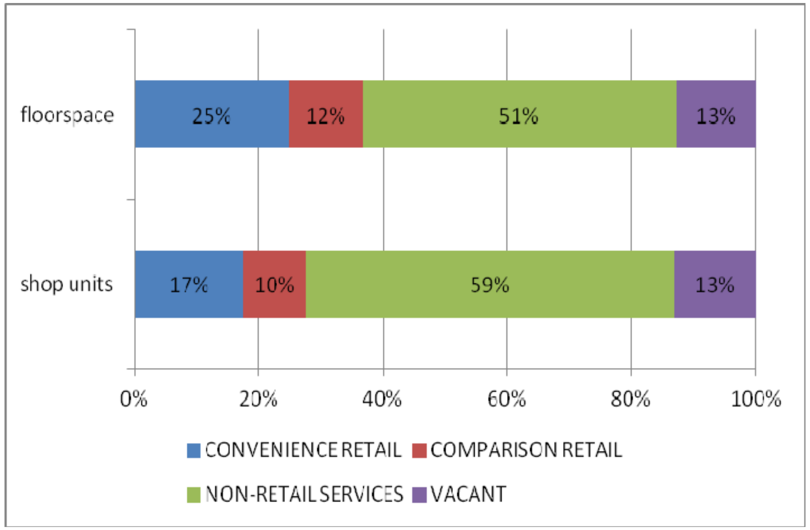
10.1 A local centre serves the needs of the local community, defined as the population within a 15 minute walk time of the centre. Local centres therefore vary significantly in size from a handful of units to over 100.

10.2 The predominant use types are convenience and non-retail. This reflects the evolution towards more service orientated centres seen in the growth of uses such as hair and beauty, fitness and health.

11.0 Focus – neighbourhood shops

shop units	floorspace (sq. m.)	average shop size (sq. m.)
751	78,336	104

Chart 17 – composition of shop units and floorspace



11.1 Neighbourhood shops meet neighbourhood needs and play an important role in creating a sense of community. They are particularly important in serving those without access to a car. Consequently, they are dominated by convenience (25%) and non-retail (51%) floorspace.

12.0 Major occupiers

12.1 There is no settled definition of a 'major occupier'. Previous retail surveys have defined it as an occupier with at least 3 separate units or 1,000 sq. m. gross floorspace. The 2010 survey identified 215 major occupiers in this way.

12.2 However, having revisited centre boundaries for this retail survey, it is reasonable to consider if the definition of a major occupier is still relevant.

12.3 The previous definition encompassed the likes of a retailer with 3 food concessions in indoor shopping centres totalling 93 sq. m. floorspace, and a privately owned furniture shop with just over 1,000 sq. m. floorspace. These cannot be considered major occupiers and their inclusion dilutes the significance of the classification.

12.4 The 2015 survey therefore defines major occupiers as those with at least 10 separate units or 10,000 sq. m. gross floorspace. The results are detailed in Appendix 3.

12.5 The major occupiers by unit are mainly in the convenience and food sectors, interspersed with betting shops and banks. The major occupiers by floorspace list is dominated by the 'big 4' supermarkets, major department stores and clothes shops.

12.6 The number of major occupiers by both units and floorspace has decreased since 2010. The long term effects of the 'credit crunch' have included consolidation in the retail sector, both in terms of store closures and changes in operators.

13.0 Loss of units

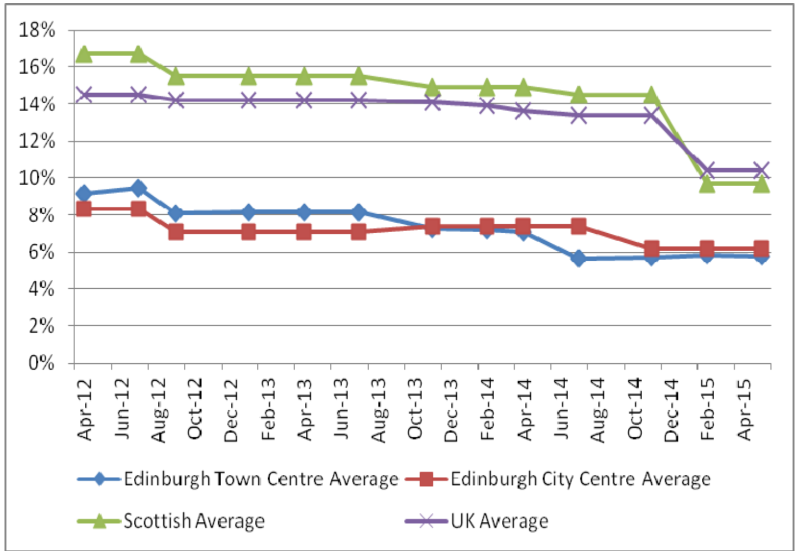
13.1 There has been a substantial slowing down in the number of retail units being lost to to other uses. The 2010 survey identified 444 shop units that had been converted, whereas the 2015 survey identifies only 88.

13.2 These figures reflect the relative states of the economy at the time the surveys were undertaken. The 2010 survey, in the immediate aftermath of the credit crunch, identified a substantial loss of retail units to other uses as businesses closed, whilst the 2015 survey reflects a stronger economic siuation.

14.0 Trends and comparisons

14.1 The market has improved since the last retail survey in 2010. Vacancy rates in the city centre and town centres have fallen and Edinburgh's figures remain substantially below both the Scottish and UK averages.

Chart 18 – comparative average vacancy rates



14.2 This trend reflects the situation elsewhere in the UK, where large centres are better placed to meet the changes in consumer demand. These are characterised by an emphasis on convenience. This refers to the ease of accessing the product, rather than the retail classification.

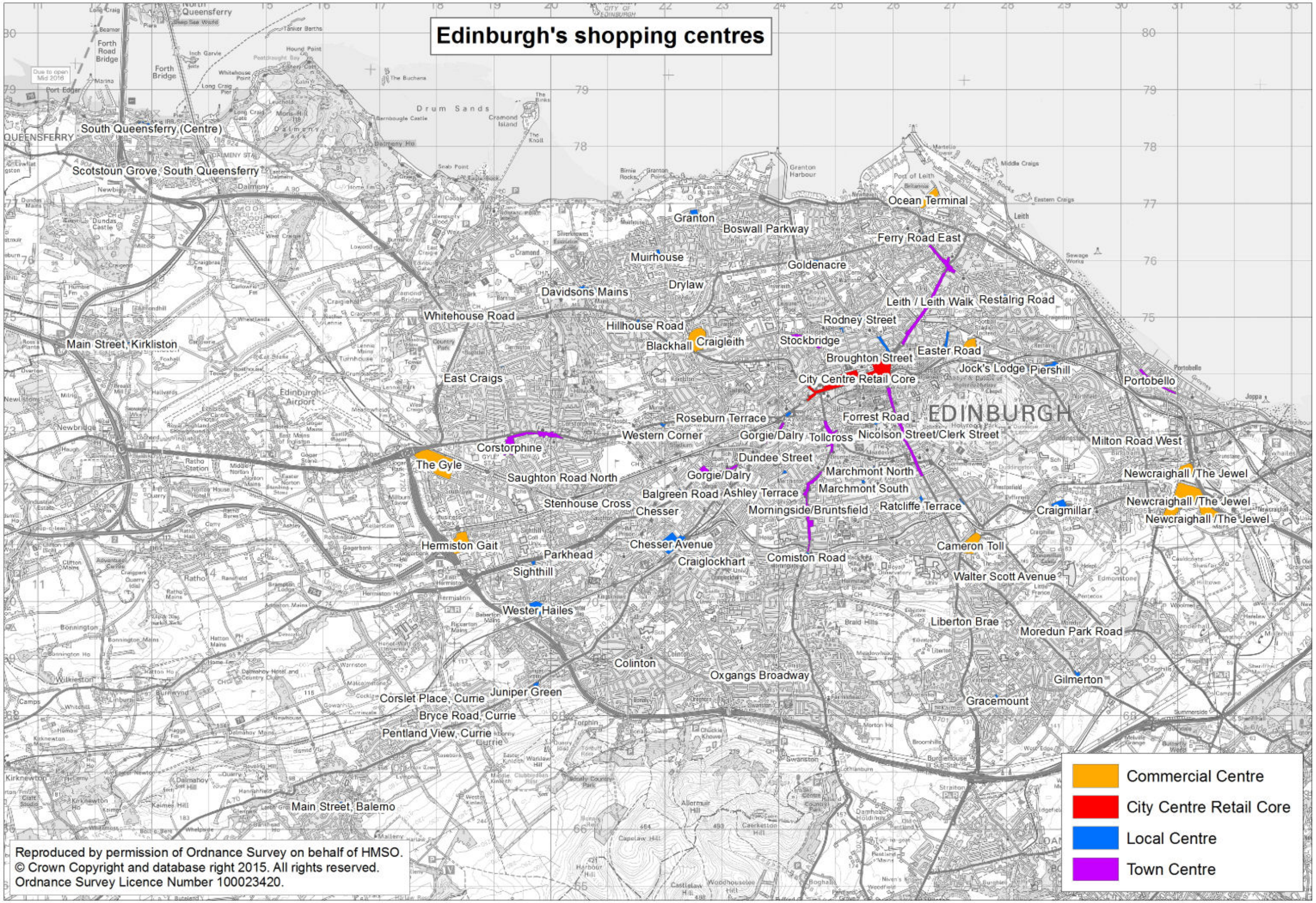
14.3 This demand for convenience can be seen in the growth of online shopping, 'click and collect' facilities, 'no contract' gyms in accessible major centres, and takeaway food units.

Morningside Road

Appendix 1

Edinburgh’s shopping centres

Edinburgh's shopping centres



Appendix 2

Survey data

Table 2- Summary by Type of Centre Unit and Floorspace (sq.m. gross) 1986-2015

	TOTAL NUMBER OF UNITS					TOTAL FLOORSPACE				
	1986	1996	2004	2010	2015	1986	1996	2004	2010	2015
EDINBURGH TOTAL	7,406	7,386	7,074	6,979	7,103	1,095,302	1,204,210	1,358,368	1,407,917	1,545,385
City Centre (core + secondary)	1,369	1,391	1,418	1,425	1,166	327,504	336,899	367,779	362,573	328,228
Other town centres	2,444	2,408	2,221	2,204	1,755	314,786	288,369	286,117	301,514	261,883
Commercial centres	134	245	373	377	324	46,842	151,184	245,289	286,671	257,851
Local shopping centres	1,310	1,273	1,210	1,207	1,224	146,005	150,980	154,557	156,960	161,945
Neighbourhood shop groups	1,549	1,503	1,267	1,213	751	128,044	131,676	124,900	123,290	78,336
Isolated shops	600	566	585	553	1,883	132,121	145,102	179,726	176,909	457,142

VACANCIES	TOTAL NUMBER OF UNITS					TOTAL FLOORSPACE				
	1986	1996	2004	2010	2015	1986	1996	2004	2010	2015
EDINBURGH TOTAL	773	848	717	713	607	79,229	74,433	79,530	102,333	92,545
City Centre (core + secondary)	96	100	77	94	62	13,077	14,116	12,365	15,873	10,438
Other town centres	243	272	238	219	118	26,484	22,029	20,952	22,635	14,552
Commercial centres	3	9	43	28	37	933	3,079	10,053	13,416	16,270
Local shopping centres	124	137	121	138	95	11,788	10,728	9,821	16,603	10,407
Neighbourhood shop groups	200	221	179	158	98	13,433	13,300	12,976	12,352	9,969
Isolated shops	107	109	59	76	197	13,514	11,181	13,363	21,454	30,909

ACTIVE RETAIL USE	TOTAL NUMBER OF UNITS					TOTAL FLOORSPACE				
	1986	1996	2004	2010	2015	1986	1996	2004	2010	2015
EDINBURGH TOTAL	3,649	3,384	2,969	2,691	2,639	672,694	760,299	871,759	877,580	943,210
City Centre (core + secondary)	776	723	706	662	564	234,341	233,287	248,417	237,907	231,250
Other town centres	1,263	1,181	968	875	725	193,520	166,590	158,540	159,182	150,371
Commercial centres	90	177	246	256	209	40,709	139,067	219,037	255,589	229,303
Local shopping centres	620	540	434	377	423	76,178	78,980	82,725	71,785	85,564
Neighbourhood shop groups	710	594	419	354	207	59,016	57,739	54,342	49,062	28,696
Isolated shops	190	169	196	167	511	68,930	84,636	108,698	104,055	218,026

Table 2 cont..../ - Summary by Type of Centre Unit and Floorspace (sq.m. gross) 1986-2015

CONVENIENCE USE	TOTAL NUMBER OF UNITS					TOTAL FLOORSPACE				
	1986	1996	2004	2010	2015	1986	1996	2004	2010	2015
EDINBURGH TOTAL	1,439	1,145	921	818	840	187,100	214,469	246,508	271,340	321,833
City Centre (core + secondary)	118	103	98	92	82	15,485	18,149	14,970	15,546	16,730
Other town centres	430	344	274	247	225	53,747	48,821	59,832	71,216	76,236
Commercial centres	33	30	27	28	19	20,559	37,093	49,585	56,082	53,343
Local shopping centres	312	244	190	163	196	49,000	51,874	56,392	49,351	60,656
Neighbourhood shop groups	443	345	249	206	131	39,560	36,474	32,984	29,673	19,423
Isolated shops	103	79	83	82	187	8,749	22,058	32,745	49,472	95,445

COMPARISON USE	TOTAL NUMBER OF UNITS					TOTAL FLOORSPACE				
	1986	1996	2004	2010	2015	1986	1996	2004	2010	2015
EDINBURGH TOTAL	2,210	2,239	2,048	1,873	1,799	485,594	545,830	625,251	606,240	621,377
City Centre (core + secondary)	658	620	608	570	482	218,856	215,138	233,447	222,361	214,520
Other town centres	833	837	694	628	500	139,773	117,769	98,708	87,966	74,135
Commercial centres	57	147	219	228	190	20,150	101,974	169,452	199,507	175,960
Local shopping centres	308	296	244	214	227	27,178	27,106	26,333	22,434	24,908
Neighbourhood shop groups	267	249	170	148	76	19,456	21,265	21,358	19,389	9,273
Isolated shops	87	90	113	85	324	60,181	62,578	75,953	54,583	122,581

NON RETAIL	TOTAL NUMBER OF UNITS					TOTAL FLOORSPACE				
	1986	1996	2004	2010	2015	1986	1996	2004	2010	2015
EDINBURGH TOTAL	2,984	3,154	3,388	3,575	3,857	343,379	369,478	407,079	428,004	509,630
City Centre (core + secondary)	497	568	635	669	540	80,086	89,496	106,997	108,793	86,540
Other town centres	938	955	1,015	1,110	912	94,782	99,750	106,625	119,697	96,960
Commercial centres	41	59	84	93	78	5,200	9,038	16,199	17,666	12,278
Local shopping centres	566	596	655	692	706	58,039	61,272	62,011	68,572	65,974
Neighbourhood shop groups	639	688	669	701	446	55,595	60,637	57,582	61,876	39,671
Isolated shops	303	288	330	310	1,175	49,677	49,285	57,665	51,400	208,207

Table 3 - Average Shop Unit Size 1986-2015

	AVERAGE SHOP FLOORSPACE (sq.m. gross)				
	1986	1996	2004	2010	2015
EDINBURGH TOTAL	148	163	192	202	218
City Centre (core + secondary)	239	242	259	254	281
Other town centres	129	120	129	137	149
Other strategic shopping centres	350	617	658	760	796
Local shopping centres	111	119	128	130	132
Neighbourhood shop groups	83	88	99	102	104
Isolated shops	220	256	307	320	243

Table 4 - no. of Units by Centre 2015

EDINBURGH TOTAL	7,103
EDINBURGH CITY CENTRE	1,166
City Centre retail core	567
West End	68
High Street / Bridges	233
Old Town	198
New Town	100
TOWN CENTRES	1,755
Corstorphine	110
Gorgie / Dalry	227
Leith & Leith Walk	398
Bruntsfield / Morningside	259
Nicolson St. / Clerk St.	315
Portobello	129
Stockbridge	169
Tollcross	148
COMMERCIAL CENTRES	324
Cameron Toll	48
Craigleith	15
Hermiston Gait	12
Meadowbank	7
Newcraighall / The Jewel	71
Ocean Terminal	90
The Gyle	81

LOCAL CENTRES	1,224
Ashley Terrace	13
Balgreen Road	15
Blackhall	20
Boswall Parkway	9
Broughton St.	73
Bryce Road, Currie	5
Chesser	12
Chesser Avenue	6
Colinton	19
Comiston Road	29
Corslet Place, Currie	4
Craiglockhart	8
Craigmillar	35
Dalkeith Road	22
Davidson's Mains	31
Drumbrae	10
Drylaw	23
Dundas Street	20
Dundee Street	17
East Craigs	4
Easter Rd.	123
Ferry Road East	22
Ferry Road West	27
Forrest Road	41
Gilmerton	18
Goldenacre	36
Gracemount	13
Hillhouse Road	22
Jocks Lodge	20
Juniper Green	19
Liberton Brae	10
Main Street, Balerno	12
Main Street, Kirkliston	8
Marchmont North	51
Marchmont South	30
Milton Road West	10
Moredun Park Road	7
Muirhouse	23
Oxgangs Broadway	13
Parkhead	13
Pentland View, Currie	9
Piershill	12
Polwarth Gardens	21
Ratcliffe Terrace	21
Restalrig Road	8
Rodney Street	29
Roseburn Terrace	33
Saughton Road North	14
Scotstoun Grove, Queensferry	7
Sighthill	14
South Queensferry (Centre)	36
Stenhouse Cross	11
Viewforth	17
Walter Scott Avenue	14
Waterfront Broadway	1
West Maitland Street	24
Wester Hailes	36
Western Corner	17
Whitehouse Road	7

NEIGHBOURHOOD SHOPS	751
Albion Road	14
Alvanley Terrace	3
Anchorfield	7
Angle Park	11
Balgreen	5
Bath Street	5
Bellevue Road	1
Bingham	1
Blackford Avenue 1	3
Blackford Avenue 2	7
Bonnington Toll	6
Broomhall Drive	3
Broomhall Road	3
Broomhouse	6
Broughton Road	7
Brunstane	4
Buccleuch Street	26
Buckstone	10
Calder Park	6
Canongate 1	11
Canongate 2	8
Caroline Park	7
Carrick Knowe	9
Causewayside	35
Chapel Street	19
Clermiston Grove	1
Colinton Mains	10
Comely Bank	9
Comely Bank Place	1
Commonwealth Pool	4
Constitution Street	19
Corbiehill	4
Corstorphine High Street	5
Craigcrook	4
Craigentinny 1	6
Craigentinny 2	4
Craigentinny 3	4
Craighall Road	18
Dalmeny	1
Dalmeny Street	3
Drum Brae Avenue	5
Duddingston Park South	4
Easter Drylaw	3
Fairmilehead	3
Ferry Road Drive	7
Forrester Park	1
Gilmerton Dykes	6
Grange Road	21
Granton	17
Granton Road 1	10
Granton Road 2	5
Granton Road 3	3
Groathill	6
Hailesland	1
Henderson Street 1	15
Henderson Street 2	7
Hutchison Place	4
Inch 2	3
Inglis Green	10
Joppa	13
Kings Road	4
Kingsknowe	6
Lasswade Road	7
Leith Links	11
Liberton Gardens	3
Lochend	6
Lochend Road	2
Longstone	10
Lorne Street	10
Marionville	9
Mayfield	14
Meggetland	4
Milton 1	2
Milton 2	8
Minto Street	5
Moredun 1	5
Mountcastle	3
Muirhouse Gardens	4
Nether Liberton	4
Newhaven	6
Newhaven Road 1	12
Newhaven Road 2	8
Niddrie 3	1
Niddrie 5	3
North Fort Street	6
Parkgrove Street	5
Pleasance 1	15
Pleasance 2	5
Portland Place	17
Prestonfield	4
Queen Charlotte Street	8
Rannoch Road	3
Restalrig 2	1
Restalrig 3	5
Restalrig 4	1
Saughton Mains	5
Saughtonhall	4
Sciennes	4
Silverknowes	7
Slateford	2
Southfield Place	1
Southhouse	4
Spring Gardens	5
St. Leonards	17
Thorntree Street	4
Trinity	2
Warrender Park	1
Watson Crescent	4
West Granton	1
Whitehouse Loan	4
Willowbrae	3
Newbridge	6
Ratho	6

ISOLATED SHOPS	1,883

Table 5 - Gross Floorspace (sq.m.) by Centre 2015

EDINBURGH TOTAL	1,545,385

EDINBURGH CITY CENTRE	328,228
City Centre retail core	263,285
West End	7,865
High Street / Bridges	26,216
Old Town	20,217
New Town	10,645

TOWN CENTRES	261,883
Corstorphine	26,615
Gorgie / Dalry	38,348
Leith & Leith Walk	61,188
Bruntsfield / Morningside	31,888
Nicolson St. / Clerk St.	51,365
Portobello	13,730
Stockbridge	16,799
Tollcross	21,950

Cameron Toll	28,010
Craigleith	25,986
Hermiston Gait	31,886
Meadowbank	12,407
Newcraighall / The Jewel	89,311
Ocean Terminal	28,608
The Gyle	41,643

LOCAL CENTRES	161,945
Ashley Terrace	1,234
Balgreen Road	1,024
Blackhall	1,224
Boswall Parkway	1,167
Broughton St.	7,466
Bryce Road, Currie	362
Chesser	1,246
Chesser Avenue	11,110
Colinton	1,416
Comiston Road	2,228
Corslet Place, Currie	623
Craiglockhart	782
Craigmillar	5,262
Dalkeith Road	1,542
Davidson's Mains	4,974
Drumbrae	630
Drylaw	3,973
Dundas Street	2,646
Dundee Street	1,052
East Craigs	718
Easter Rd.	11,408
Ferry Road East	1,834
Ferry Road West	3,196
Forrest Road	5,200
Gilmerton	3,561
Goldenacre	2,576
Gracemount	2,011
Hillhouse Road	1,460
Jocks Lodge	1,523
Juniper Green	1,840
Liberton Brae	795
Main Street, Balerno	1,703
Main Street, Kirkliston	822
Marchmont North	5,240
Marchmont South	2,677
Milton Road West	3,354
Moredun Park Road	1,209
Muirhouse	5,545
Oxgangs Broadway	822
Parkhead	2,024
Pentland View, Currie	815
Piershill	8,853
Polwarth Gardens	1,948
Ratcliffe Terrace	1,698
Restalrig Road	523
Rodney Street	1,787
Roseburn Terrace	2,757
Saughton Road North	1,192
Scotstoun Grove, Queensferry	849
Sighthill	1,607
South Queensferry (Centre)	2,365
Stenhouse Cross	621
Viewforth	1,418
Walter Scott Avenue	1,432
Waterfront Broadway	8,496
West Maitland Street	3,730
Wester Hailes	10,161
Western Corner	1,084
Whitehouse Road	1,130

NEIGHBOURHOOD SHOP GROUPS	78,336
Albion Road	1,166
Alvanley Terrace	809
Anchorfield	480
Angle Park	1,451
Balgreen	292
Bath Street	670
Bellevue Road	91
Bingham	158
Blackford Avenue 1	367
Blackford Avenue 2	317
Bonnington Toll	1,266
Broomhall Drive	350
Broomhall Road	189
Broomhouse	393
Broughton Road	541
Brunstane	118
Buccleuch Street	1,834
Buckstone	1,327
Calder Park	874
Canongate 1	732
Canongate 2	893
Caroline Park	698
Carrick Knowe	433
Causewayside	2,834
Chapel Street	1,124
Clermiston Grove	31
Colinton Mains	1,138
Comely Bank	653
Comely Bank Place	45
Commonwealth Pool	643
Constitution Street	1,997
Corbiehill	605
Corstorphine High Street	406
Craigcrook	135
Craigentinny 1	298
Craigentinny 2	319
Craigentinny 3	424
Craighall Road	1,569
Dalmeny	13

Dalmeny Street	212
Drum Brae Avenue	891
Duddingston Park South	1,095
Easter Drylaw	187
Fairmilehead	314
Ferry Road Drive	914
Forrester Park	232
Gilmerton Dykes	627
Grange Road	3,127
Granton	4,211
Granton Road 1	507
Granton Road 2	305
Granton Road 3	468
Groathill	634
Hailesland	121
Henderson Street 1	1,620
Henderson Street 2	615
Hutchison Place	195
Inch 2	243
Inglis Green	1,499
Joppa	1,139
Kings Road	339
Kingsknowe	389
Lasswade Road	1,089
Leith Links	830
Liberton Gardens	144
Lochend	1,565
Lochend Road	114
Longstone	1,343
Lorne Street	978
Marionville	423
Mayfield	1,325
Meggetland	376
Milton 1	117
Milton 2	822
Minto Street	620
Moredun 1	490

Mountcastle	123
Muirhouse Gardens	374
Nether Liberton	240
Newhaven	474
Newhaven Road 1	729
Newhaven Road 2	476
Niddrie 3	164
Niddrie 5	131
North Fort Street	1,260
Parkgrove Street	221
Pleasance 1	1,465
Pleasance 2	415
Portland Place	808
Prestonfield	90
Queen Charlotte Street	1,047
Rannoch Road	888
Restalrig 2	480
Restalrig 3	222
Restalrig 4	87
Saughton Mains	837
Saughtonhall	537
Sciennes	337
Silverknowes	571
Slateford	118
Southfield Place	61
Southhouse	396
Spring Gardens	232
St. Leonards	4,015
Thorntree Street	522
Trinity	245
Warrender Park	322
Watson Crescent	643
West Granton	136
Whitehouse Loan	690
Willowbrae	200
Newbridge	447
Ratho	530

ISOLATED SHOPS	457,142

Appendix 3

Major occupiers

Appendix 3 - major occupiers

Occupiers with 10 or more units in Edinburgh

RANK	BUSINESS NAME	GOODS CATEGORY	TOTAL NO. OF SHOP UNITS
1	Scotmid	supermarket	41
2	William Hill	betting shop	38
3	Greggs	baker	34
4	Bank of Scotland / HBOS	bank	32
5	Ladbrokes	betting shop	29
6	Boots	chemist	24
7	Sainsbury's	supermarket	24
8	Tesco	supermarket	24
9	Royal Bank of Scotland	bank	23
10	Starbucks	coffee shop	18
11	Subway	sandwich take-away	18
12	Costa Coffee	coffee shop	14
13	Scotbet	betting shop	14
14	Day-Today Express	convenience store	13
15	Lloyds Pharmacy	chemist	13
16	Best One	convenience store	12
17	Cancer Research U.K.	charity shop	11
18	McDonalds	restaurant & hot food take-away	11
19	Post Office	post office	11
20	Timpson	shoe repairs, key cutting etc.	11
21	Santander	bank	10

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

RANK	BUSINESS NAME	GOODS CATEGORY	TOTAL NO. OF SHOP UNITS
1	Sainsbury	supermarket	24
2	Tesco	supermarket	24
3	Morrisons	supermarket	8
4	Asda	supermarket	3
5	Marks & Spencer	mixed food & non-food goods	8
6	Scotmid	supermarket	41
7	B & Q Warehouse	DIY	2
8	Boots	chemist	24
9	British Home Stores (BHS)	mixed non-food goods	4
10	Debenhams	mixed non-food goods	3
11	Jenners (House of Fraser)	mixed non-food goods	3
12	Primark	general clothing	2
13	New Look	women's clothing	7

Appendix 4

Retail Inquiry classification

CONVENIENCE GOODS

11	Large General Food Stores
12	Small General Food Stores
13	Dairies
14	Butchers & Poulterers
15	Fishmongers
16	Greengrocers & Fruiterers
17	Bakers
21	Newsagents etc.
22	Wine Merchants

COMPARISON GOODS

31	Gents Clothing
32	Ladies & Childrens Clothing
33	General Clothing (Ladies & Gents)
34	Footwear
35	Leather Goods (excl. clothing)
41	Soft Furnishings
42	Floor Coverings
43	Furniture
44	Electrical & Musical Goods
45	Hardware, Ornamental Goods etc.
46	D.I.Y. Materials
51	Chemists & Opticians
52	Books
53	Photographic & Optical Goods
54	Bicycles & Prams

55	Jewellery, Clocks, Watches
56	Leisure & Recreational Goods
57	Florists & Gardening Supplies
58	Pets & Pet Supplies
61	Large Mixed Durable Shops
(62)	Other Mixed Durable Outlets
70	Charity Shops
71	Rental / Hire
72	Repairs

NON - RETAIL USES

100	Wholesale Activities
111	Banks
112	Other Financial Activities
113	Building Societies
114	Estate Agents
115	Travel Agents
116	Betting Shops
117	Dry Cleaners
118	Undertakers
119	Photographic Studios
120	Trades, Craft Workshops, Manuf'g
(133)	Community Services & Activities
141	Served Food
142	Amusement Centres
144	Public Houses, Bars, Taverns
151	Car Sale & Hire

152	Car Accessories
153	Petrol Stations, Service Stations
(155)	Unknown Use
121	Launderettes
122	Hair & Beauty
123	Fitness & Active Leisure
124	Other Personal Services
125	Furniture Removal
126	Medical
127	Booking Agencies (Theatre, Travel etc.)
128	Internet Access
131	Post Offices
132	Professional & Business Services

VACANT PREMISES

160	Vacant - Formerly Occupied
(165)	Under Conversion or Refurbishment