

Q1. 2019 (April – June) Performance Report



MANCHESTER
BUSINESS
IMPROVEMENT
DISTRICT





The following pages summarise:

3.1 July BID Board - Performance Report

- Q1 Footfall and Sales Performance Q1
- Retail Occupancy & Investment
- Outlook

3.2 BID Events & Collaborations

- MCR Student Social (May)
- Manchester Jazz Festival (May)
- The King Street Festival (June)
- Mystery Shopping Awards (June)

3.3 Marketing Manchester Partnership Update



3.1 Footfall and Sales Performance

Year to Date

- Footfall from January, against same period last year is:
-2.8% Manchester -0.7% UK

2019 trend continues to be negative, partly due to the continued impact of road & other infrastructure works around the city centre

- Sales (averages) year to date against same period are:
+0.7% Manchester +3.0% UK

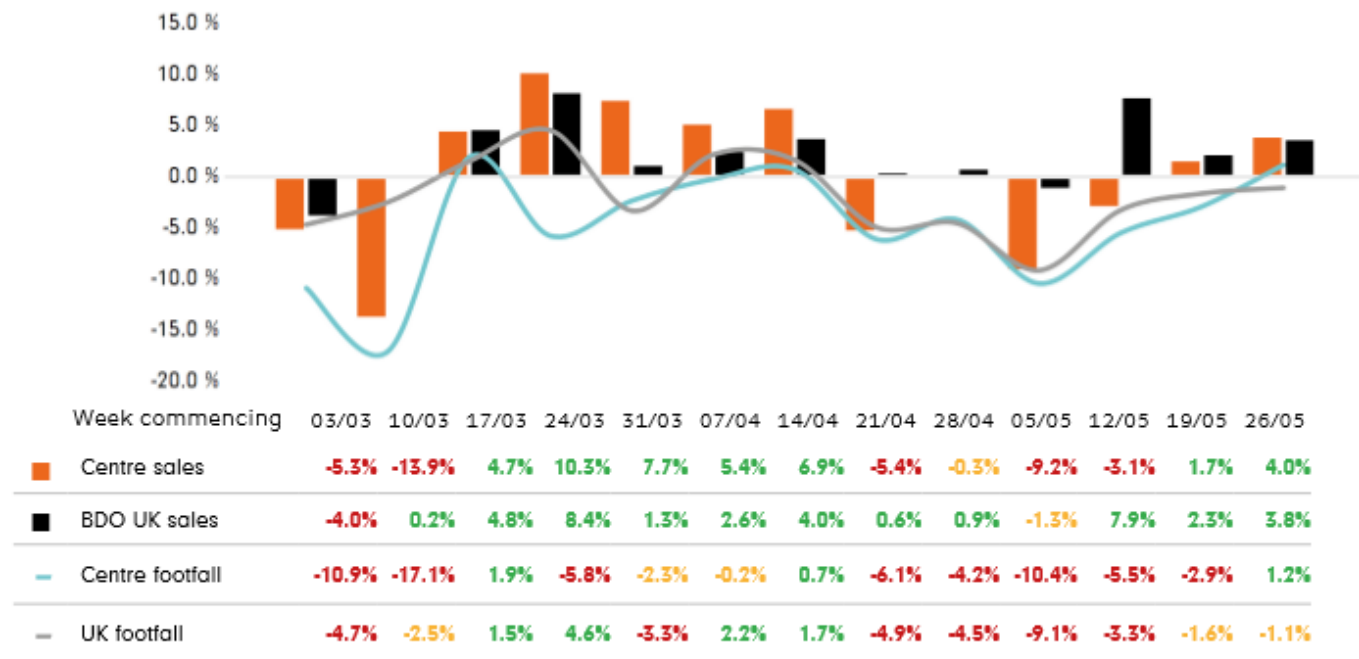
National picture helped by more favourable comparisons vs poor weather last year in March & April

Q1 2019

- Recent months have seen continued mixed trading, mirroring national trends. The mid-market of fashion and hospitality are the most adversely affected
- After a more encouraging April against poor weather the opposite has happened in May. See chart (A) overleaf

Sales and Footfall data

Year on year % (rolling 13 weeks)



April year on year sales
+2.9% MCR +1.9% UK

April year on year footfall
-1.9% MCR -1.0% UK

May year on year sales
-1.7% MCR +2.1 UK

May year on year footfall
-5.6% MCR -4.8% UK

Retail Occupancy and Investment

As reported nationally, increasing numbers of ‘traditional’ national retailers continue to announce CVA and other restructuring packages, plus ongoing store closures in selected locations. For Manchester city centre, the outcome of these are ongoing but the larger flagships such as House of Fraser and Debenhams thankfully continue to trade, likewise for Arcadia and Boots stores. Manchester Arndale continues to offer high levels of occupancy & new tenants but has lost some occupiers recently, for example Clas Olhson.

In hospitality the casual dining sector remains turbulent, with the recent closure of Jamie’s Italian on King Street serving as a reminder that Manchester is not immune to the difficulties of the market. However there continues to be growth in the coffee shop & quick service sector, plus new entrants at the ‘fine dining’ end of the market. King Street is now emerging as a luxury dining location with a number of new restaurants now opening, such as Kala and Mash Tun, adding to relative newcomers El Gato Negro and Tast

Overall the city centre does also continue to attract many new entrants and reinvestment. Notable examples are the recent opening of Uniqlo and the continued reinvestment in all the retail banks (Barclays on Market Street as the latest example). Primark are continuing to develop their city centre store at the same time as building their new one at the Trafford centre. M&S on Market Street will embark upon a multi-million pound refurbishment from the end of June.

Openings and Closings

OPENINGS	CLOSURES
MANCHESTER ARNDAL / NEW CATHEDRAL STREET	
Archies – Casual Dining	Greggs
Pixel	Radley
Quiz	
Rituals	
All Saints – Relocation	
ST ANN'S SQUARE / CROSS STREET	
Say It With Diamonds – prev Camper	David M Robinson - Refurb
IQOS (Vaping) – prev vacant	Real Buzz
MARKET STREET / ST MARY'S GATE	
Uniqlo	Barclays – Refurb
Enterprise Nation / Amazon pop up	
KING STREET	
Kala – prev Whistles	Hawes & Curtis
Mash Tun – prev Grafene	Jamie's Italian
Jack Wills – Relocation	
DEANSGATE	
	The Money Shop

City Hosts Update

The Hosts team continue to focus on their three functions:

Customer Interactions

Q1 (April/May) 13000

Business Visits

Q1 (April/May) 1,425

Environmental Reports

Q1 (April/May) 305 issues observed & escalated with MCC
90% resolved

- City Hosts TUPE to CityCo is now complete.
- We are currently recruiting for x1 City Host.

Outlook

Manchester is increasingly becoming perceived as one of a small group of ‘premier’ cities for consumer-focused businesses to invest in their businesses, even if retreating from the high street in other locations. This is reported to be due to the continued growth of the city centre’s population, infrastructure and visitor numbers

It is the interdependence of the city centre economy that is so important in sustaining Manchester’s appeal to business, visitors and residents alike. With the excellent support of Visit Manchester, regular city centre events from Chinese New Year, through to the Jazz, King Street & Pride festivals are helping to highlight the attractions of the city. These complement the amazing mix of national and international events in 2019 spring-summer period, such as the Cricket World Cup & the Manchester International Festival

For the BID’s levy payers, the risks to their businesses mainly centre on any further weakening in economic confidence and slowing of investment. However the challenge of maintaining a pleasant and welcoming city centre environment should also be noted, as this constantly raises a lot of comment from visitors & businesses

The BID board & partners were pleased with the results of BID’s programme of deep cleaning earlier in the year. The BID will look to repeat annually, and store teams regularly join clean-up days. Many levy payers are also continuing to work with CityCo, MCC and a range of charities to help address rough sleeping and homelessness. On policing, the numerous initiatives to tackle the most serious threats are welcome and having a positive impact, such as on drugs and knife crime

Despite this, the cumulative impact of constant ‘low level’ issues remain in the city centre, particularly aggressive begging and retail crime. The vast majority of businesses support the potential implementation of a PSPO but worry that resources will not be sufficient to tackle the multitude of issues that can mean the perception of the city is dangerous.



3.2 BID Events & *Collaborations*

Complete

- Chinese New Year: 7-10 Feb
- MCR Student Social: 2 May
- *Manchester Jazz Festival: 23-27 May*
- King Street Festival: 1-2 June
- BID Mystery Shopping Awards: 20 June

Next

- *Greater Manchester Fringe: July*
- *Manchester Pride: 19-26 August*
- MCR Student Social: 24 Sept
- Halloween in the City: 26-27 Oct



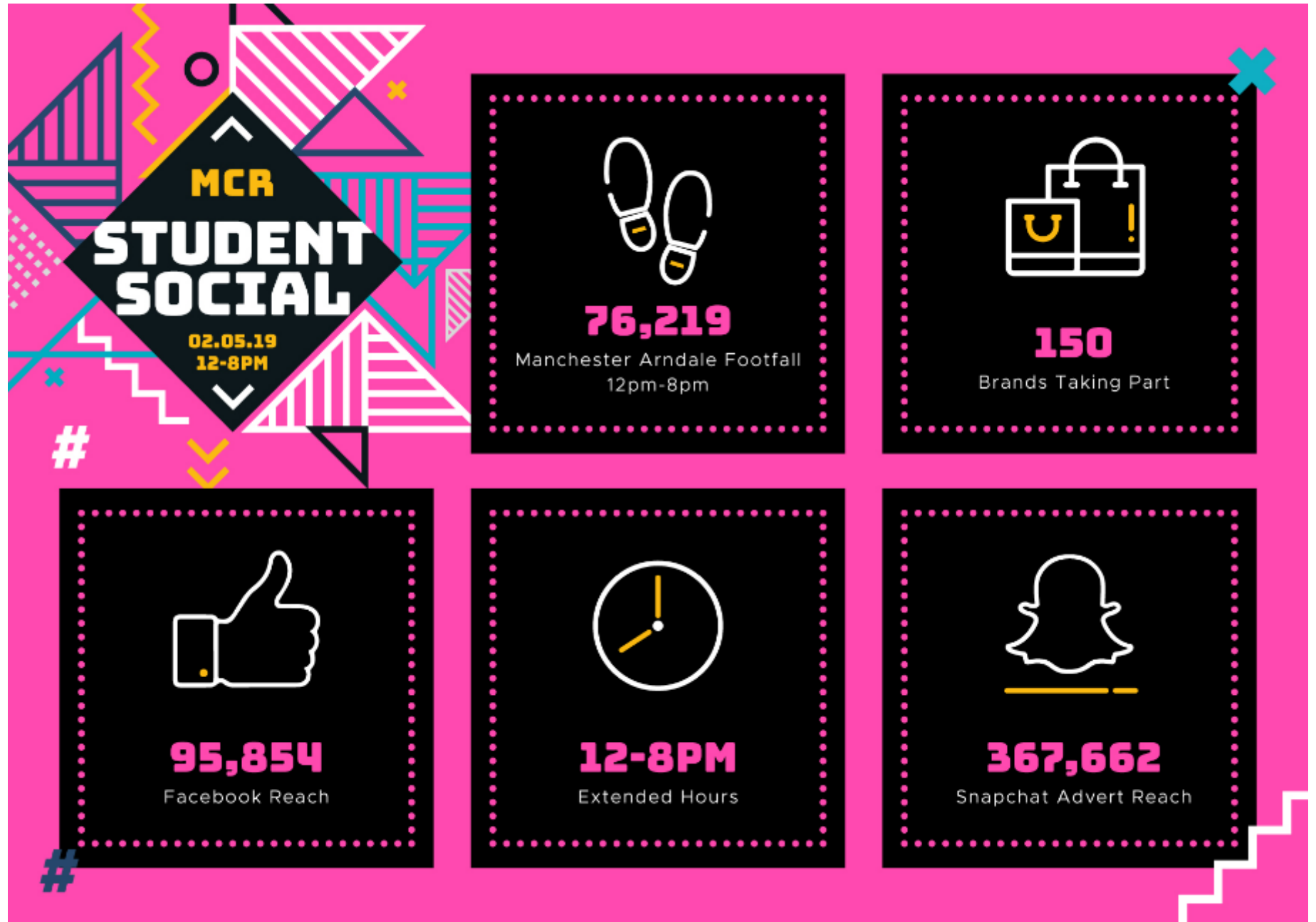
MCR Student Social (Spring)

Please click links
below...

PR Coverage £34,700 AVE

Photography

YouTube Channel





- Introductions and information given to BID levy payers
- 5 day event. Jazz Festival moved to its new BID district location for 2019 (St. Ann's, Exchange Street, New Cathedral St)
- Previously based in Albert Square and Festival held from 20-28 July
- 3 outdoor live music stages. All events were free to attend apart from indoor venue gigs
- Partnership with Harvey Nichols: Bar for bandstand and use of brasserie for the launch

Top Line Results

	2019 St Ann's Sq.	% vs 2018	2019 N.C. Street	% vs 2018
Friday 24th May	35321	n/a	32956	+31%
Saturday 25th May	40757	n/a	42632	+13%
Sunday 26th May	17018	n/a	28493	+15%
Monday 27th May	11517	n/a	27752	+26%

Footfall from two Manchester BID footfall cameras in St Ann's Square (Acresfield) and New Cathedral Street

NB the Acresfield camera does not have year on year data as installed April 2019

Manchester Jazz Festival



The 2019 King Street Festival

For 4th year running, event attracted an additional 20,000 people to the area

Warmly welcomed by levy payers

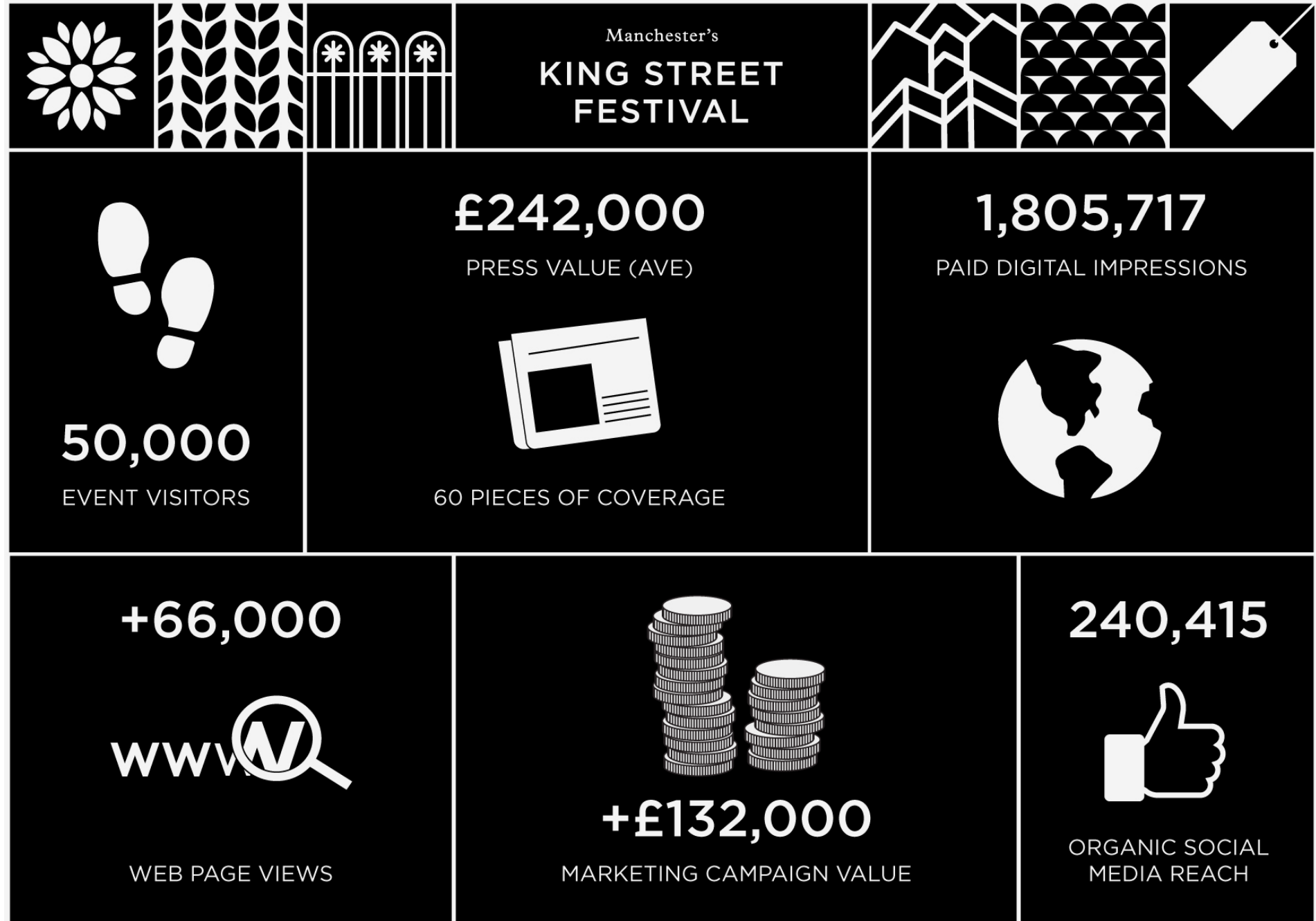
Increasing numbers of restaurants. 12 venues forming the 'cocktail trail' & 7 offering VIP 'Winner's Table' free lunch prizes

Please click links below...

[PR Coverage](#)

[Photography](#)

[2019 King Street Festival film](#)





2019 BID Mystery Shopping





- ♥ 4th Year of popular mystery shopping service and Celebration Breakfast Awards
- ♥ Over 320 businesses participated, with Storecheckers 'secret shopper' visits during May. All stores receive detailed reports
- ♥ 115 representatives of 70 different BID business attended the Awards Breakfast on 20th June, at Royal Exchange Theatre
- ♥ 134 business 'winners', scoring over 90% across 13 categories
- ♥ 30 business scored 100%
- ♥ 13 category 'best of the best winners'
- ♥ 83% total average score, amongst top UK location scores

2019 BID Mystery Shopping Awards



3.3 Marketing Manchester Partnership Update

Manchester BID works all through the year with Marketing Manchester digital and communication teams on campaigns and projects to promote the city centre nationally and internationally.

2018-19 BID-Funded Projects

- Visitmanchester.com portal, social media, paid digital advertising and communications support for the full programme of 2018/19 BID public events. *Complete and reported*
- Part-funding for a major Marketing Manchester and Visit Britain digital, PR and event campaign in Dubai and GCC to promote rediscovering Manchester to high-spending expats. *Media report due from Visit Britain*
- Funding of Phase 1 photography and video content to showcase the BID's jewellers, King Street retailers, 'foodies' and general BID shots on visitmanchester.com. Including the creation of a new 'Jewellery Quarter' portal. *Complete and reported*

2019-20 BID-Funded Projects

- Visitmanchester.com portal, social media, paid digital advertising and communications support for the BID's programme of public events and collaborations: The King Street Festival (*Complete*), GM Fringe (July 2019), Halloween (October 2019), Chinese New Year (Jan 2020)
- Funding of more photography and video content to help enhance visitmanchester.com, particularly Shopping and Eating sections. The second phase of digital content development to support retail, F&B and present engaging content for the city centre



Marketing - Partnerships & collaborations



Marketing Manchester/BID: Chinese New Year 2019 Digital Results













Chinese New Year

- January 2019
- Chinese New Year microsite (185,000 page views)
- Paid digital advertising campaign (52,000 clicks)
- 16,000 emails
- Organic social campaign (74, 750 reach)
- Dragon Parade live social media activation (100,000 reach)



Marketing Manchester/BID: King Street Festival 2019 Digital Results

  <p>66,313 page views</p>	 <p>676 competition entries</p>	 <p>1.65m paid impressions</p>
 <p>46 web events</p>	 <p>22 social media posts</p>	 <p>33,439 paid clicks</p>
 <p>5 premium placements across the website</p>	 <p>128,608 organic impressions</p>	 <p>16,708 emails delivered</p>

Marketing Manchester/BID: 2019 Expat Campaign in Dubai



Rediscover Manchester campaign

Please click links below...

[Rediscover
visitmanchester.com
portal](https://www.visitmanchester.com/portal)

[Rediscover film](#)

- Dubai expatriates traveling to UK
- Objective: to increase length of stay and spend in Manchester City Centre when visiting family and friends
- Radio and digital



Marketing Manchester/BID: 2019 visitmanchester.com Content Development

Please click links below...



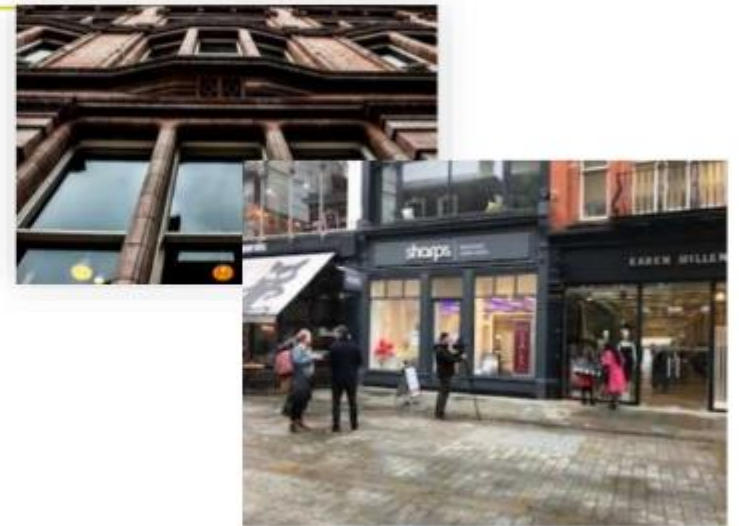
[Rediscover film](#)

['It All Starts in Manchester' film](#)

BID content has also been used in a 3rd film (*under-wraps due to licensing*) that will be broadcast during the live streaming of the Cricket World Cup. Viewing figures will be in the billions

Video Content

- February 2019
- GCC 'Rediscover Manchester' campaign
- 'Unmissable days out in Manchester' campaign
- 30 second CWC19 promotional video



Marketing Manchester/BID: 2019 visitmanchester.com Jewellery Content



Please click links below...

[Jewellery Quarter](#)
[visitmanchester.com portal](#)

[Jewellery film](#)

Jewellery Quarter

- Jewellery Quarter Section launched in May 19
- Phase 1 live
- Phase 2 underway

