Pandemic & related effects on Glasgow's City Centre Economy

Draft Report

On behalf of **Glasgow Chamber of Commerce**

Date: March 2022

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Executive Summary

To be completed for the following report sign off.

- Prior to the pandemic, Glasgow City Centre had a growing economy. It had earned several accolades in tourism and inward investment, reflecting its ambition to become one of the UK's best performing Cities. It was also selected as the host of COP26, reflecting its Net Zero ambitions.

- The City Centre economy was projected to grow by 2.4% in 2020 and 2.7% in 2021.

- Among other cities in Scotland, Glasgow faced multiple and prolonged lockdowns, forcing footfall to decline to as little as 10% of pre-pandemic levels across its core streets. This had an initial and significant impact on the City's hospitality sector, which is still employing 10.3% fewer people than pre-pandemic.

- Reliance on office working and student populations had a damaging impact on core retailer and leisure revenue, more pronounced during periods of heaviest COVID-19 restrictions. At October 2021, City Centre footfall was still 23% below October 2019 levels.

- The estimated impact of the pandemic on the City Centre is £2.043 billion in GVA over the past two years, reflecting a reduction of 12% in GVA in 2020 and 10% in 2021.

- Potential measures to support economic recovery include:

    - **Commuting:** Free (or subsidised) and higher quality public transport as well as promoting flexible working hours to encourage a return to the office and increased day-time footfall.

    - **Hospitality:** A promotional 'Welcome Back' campaign to encourage greater levels of leisure tourism to Glasgow, and new initiatives that mirror the 'Eat Out To Help Out Scheme'.

    - **Partnership:** Developing a business improvement district (BID) in the City Centre, to bring private sector resources together with public sector commitments to help drive economic recovery.

1 Introduction

1.1.1 Glasgow Chamber of Commerce (GCOC) is a collaborative city partner, contributing to City planning and business strategies and with an active involvement in the Glasgow Economic Leadership and the Connectivity Commission. It is keenly engaged in the Glasgow Economic Recovery Group and the Glasgow City Centre Taskforce.

1.1.2 GCOC has been appointed by Glasgow City Council (GCC) to deliver a programme of work to support the City Centre's recovery from the effects of the pandemic. Its objectives are to:

- Create the conditions to maximise the attractiveness of Glasgow City Centre. This includes investment, footfall, and consumption.
- Position Glasgow as the job's engine room of the regional economy. This includes articulating key city centre propositions, building sharable market knowledge and showcasing asset base.

1.1.3 The work programme is split into two key workstreams:

- **Data and market intelligence:** Develop a process to gather, analyse and share market intelligence and trends. Also includes the development of a distinct city centre narrative as a subset of the Glasgow Business Narrative.[1]
- **Early interventions and policy levers:** Work programme will include identifying policy interventions to support the attractiveness of Glasgow city centre to investors (including innovative financing mechanisms and fast-track planning processes). This work programme will also include an economic impact assessment.

1.1.4 Ryden and Stantec were appointed in September 2021 by the GCOC to develop the *'Early interventions and policy levers'* workstream. The *'Data and market intelligence workstream'* is being supplied by Forecast Analytics and Business of Cities.

1.1.5 The wider programme is being overseen by a Taskforce which includes representatives from Glasgow City Council, Glasgow Chamber of Commerce, other members of the public sector and businesses representing key city centre sectors.

1.1.6 This document details the following:

- **City Centre Economic Baseline:** setting out the pre-COVID health of the City Centre at March 2020 against a range of socioeconomic indicators informed by related issues and opportunities that the COVID-19 pandemic has caused and accelerated.
- **Economic Impact Assessment:** setting out the estimated economic impact that the pandemic has had on the City Centre economy.

[1] Available at: https://invest-glasgow.foleon.com/glasgow-narrative/our-business-story/cover/

2 Economic Baseline

2.1 Introduction

2.1.1 This chapter sets out the context of the report. It also defines the Study Area before assessing the economic baseline at a national, regional and city level.

2.2 Study Area

2.2.1 The GCOC has agreed that the Study Area should be the 9 district boundaries shown in Figure 1 below. This allows for a consistent approach with the Glasgow City Centre Strategy and related district regeneration frameworks (DRFs).

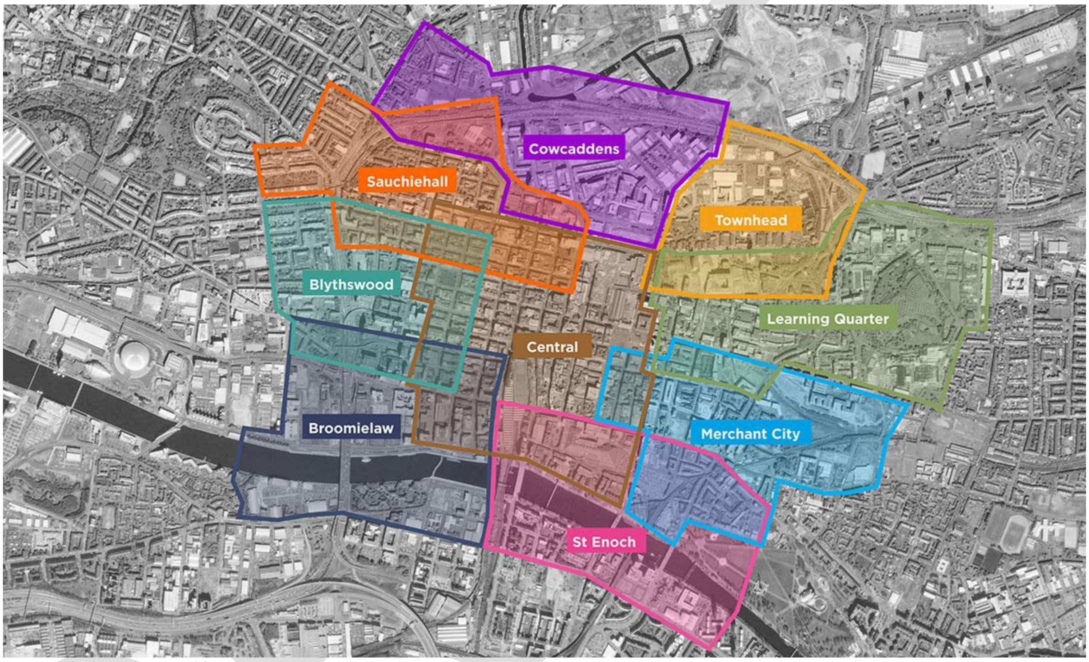


Figure 1: Study Area (Glasgow Districts)

2.2.1 A range of publicly available data and information underpins this economic baseline and analysis. This data is supplemented and enhanced by the institutional experience and expertise of the project partners which supports detailed understanding of the local context and socioeconomic landscape. The information contained within this report includes data from the following sources:

- Office for National Statistics (ONS).
- Statistics.gov.scot.
- National Records of Scotland.
- Centre for Cities.

2.2.2 These sources of official statistics and information provide a solid and reliable foundation from which to build an understanding of the change in Glasgow's economic performance between Q1 2020 and Q4 2021. However, there are some limitations to the granularity of understanding which can be extracted from the available data.

2.2.3 Firstly, the boundaries of the DRF's are not official statistical spatial geographies. This means that each District has been constructed from smaller constituent parts, namely Scottish 2011 data zones. The data zones themselves are often irregularly shaped, and therefore the aggregation of several data zones results in an approximation of the district's overall profile. Because of this it may be the case that the underlying data zones which were included in the construction of the district geography include areas which are not technically a part of the district.

2.2.4 Furthermore, several of the districts' geographies overlap which results in some features residing within two Districts. To avoid double counting when reporting statistical figures, professional judgement has been applied where necessary (i.e., two Districts overlap) to assess which District would be most appropriate for the feature.

2.2.5 Second, not all publicly available datasets report figures at the data zone level. In many instances larger statistical geographies such as Lower Super Output Areas (LSOAs), Middle Super Output Areas (MSOAs), or even Local Authority (LA) are the smallest spatial levels at which data is available. The result of acquiring data at these spatial levels is that the information is not specific to a particular District or the core City Centre, and very often the larger spatial areas will cover portions of a few of the districts together.

2.2.6 Nevertheless, the data collected and analysed in this report is still important in establishing the wider context and understanding of key economic drivers, pressures and opportunities faced by Glasgow as it emerges and recovers from the COVID-19 pandemic.

2.2.7 To help understand the analysis, Table 1 sets out the interchangeable definitions used throughout the report.

Table 1: Definitions

Name	Definition
City of Glasgow	Glasgow Local Authority area
Study Area	9 District Regeneration Framework's (DRFs)
City Centre	Core commercial area of Glasgow (i.e., bounded by the M8 and Clyde). This is taken to be the City Centre East (S02001932), City Centre West (S02001933) and City Centre South (S02001934) intermediate zones

2.3 Context

2.3.1 Coronavirus-19, commonly referred to as COVID-19 or simply 'the pandemic' has been described as a "one-in-a-hundred-year event"[2]. It has caused significant and prolonged economic downturn across the globe. In the UK, GDP fell by 22% in the first half of 2020: the largest fall in nearly 400 years. During the Global Financial Crisis, GDP shrunk by no more than 2.1% in a single quarter[3], highlighting the magnitude of the initial economic shock following the outbreak of COVID-19.

2.3.2 To limit the rapid spread of the deadly virus, countries including the UK rolled out various restrictive measures. The key, overarching mitigation strategy was a national lockdown, and the order for people to stay at home and only leave the house for 1 hour to exercise. At its peak, this involved the complete shutdown of some sectors with others at limited capacity.

2.3.3 From a demand-side perspective, social distancing measures had the effect of drastically reducing consumer confidence in sectors with higher instances of human contact. People were reluctant to spend money and were extremely pessimistic at the height of nationwide lockdowns. However, despite significant impacts on hospitality, brick & mortar retail, and

[2] The Monetary Policy Toolbox in the UK, a speech given by Dave Ramsden, Deputy Governor for Markets & Banking (2020) The Monetary Policy Toolbox in the UK (bankofengland.co.uk)

[3] GDP monthly estimate, UK - Office for National Statistics (ons.gov.uk)

tourism, the pandemic accelerated demand in e-commerce and related online service sectors. This created a subsequent imbalance in demand for labour and materials.

2.3.4 From a supply-side perspective, global supply chains have been severely disrupted, causing shortages of essential goods and materials in the short run. The increase in the cost of building materials is a case in point.[4] Globally shipping faces a significant challenge in redistributing empty containers for resupplying global markets. Supply chains have also been impacted by additional customs checks due to Brexit. While the impact of this is difficult to quantify, the broad consensus amongst economists is that it has had a negative impact on the UK economy.[5] Supply chains were further disrupted by the Suez Canal blockage on 23 March 2021, with an estimated impact of $54 billion in lost trade, globally.[6]

2.3.5 While the pandemic induced recession with three main similarities to the 2008 global financial crisis - uncertainty, financial collapse and unprecedented monetary and fiscal policy stimuli - the global economy is progressing more rapidly towards pre-recessionary (pandemic) levels.

- **Uncertainty:** As COVID-19 rapidly spread throughout the world, national governments and the pharmaceutical industry mobilised to develop a vaccine to prevent further spread of the deadly virus and mitigate the impact it had on human health. Despite the equally rapid response and development of multiple vaccine's, the global economic outlook was uncertain.

- **Financial Collapse:** On the 12th of March 2020, amid the escalating crisis surrounding the coronavirus and fears of a global recession, the Financial Times Stock Exchange (FTSE) 100 suffered the second largest one day crash in its history and the biggest since the 1987 market crash.[7]

- **Monetary & Fiscal Stimuli:** As detailed in 2.5.2, the UK Government responded with one of the largest economic stimuli packages the country has ever seen, Coronavirus Job Retention Scheme (CJRS) - 11.7 million jobs were supported, costing the Government £70 billion. In comparison, Alistair Darling, then Chancellor of the Exchequer, announced a £20-billion fiscal stimulus package in his pre-budget report for 2009/10, despite the very poor state of public finances at the time.[8]

[4] Construction new orders fell by 11.9% in 2020 to £55,631 million, reaching its lowest level recorded since 2013. Available at: https://www.ons.gov.uk/businessindustryandtrade/constructionindustry/articles/constructionstatistics/2020

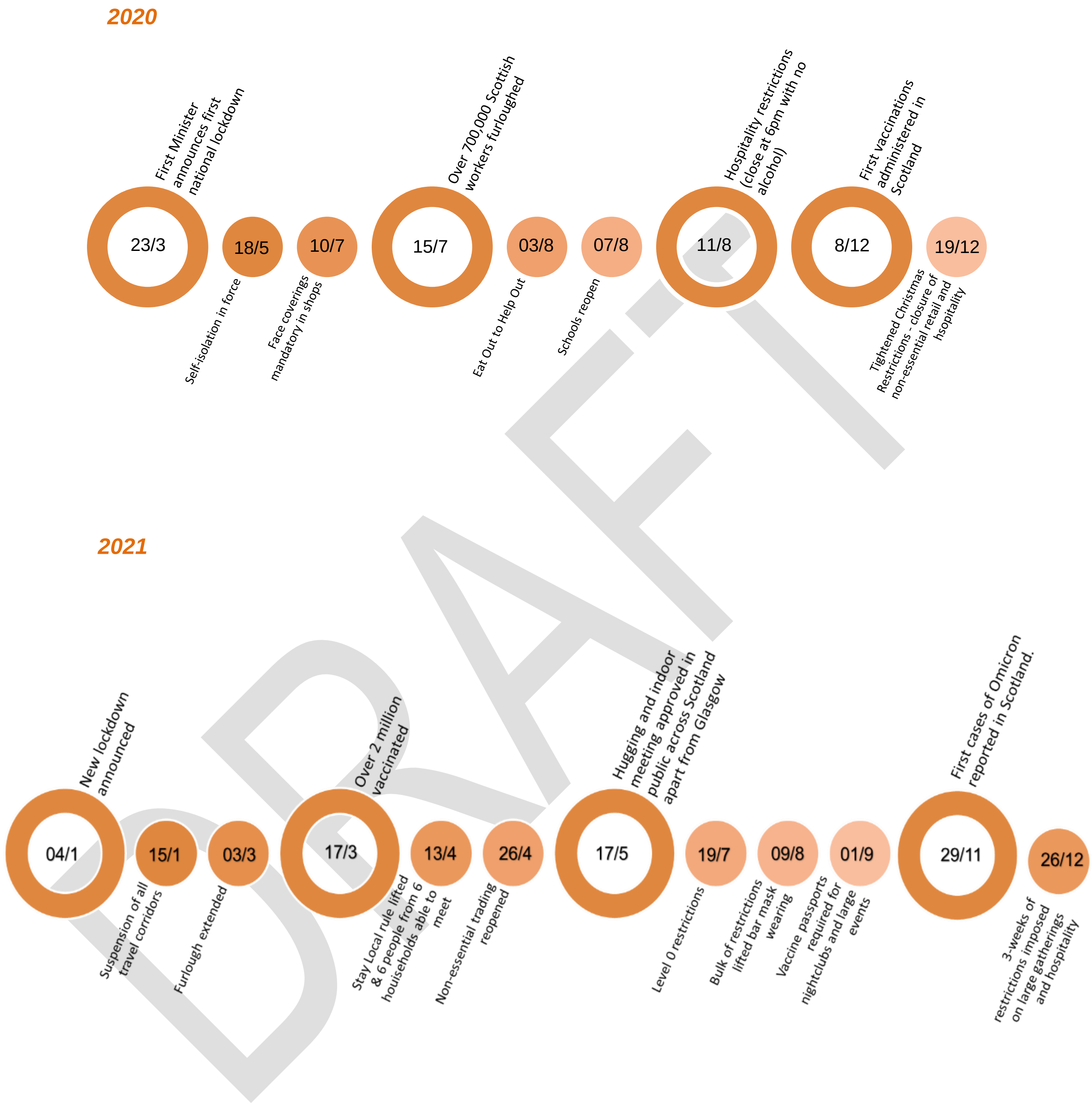
[5] Brexit one year on: the impact on the UK economy. Available at: https://www.ft.com/content/c6ee4ce2-95b3-4d92-858f-c50566529b5e

[6] The blockage had caused disruption to deliver over $9 billion worth of goods each day which is equivalent to $400 million worth of trade per hour. Since it had been stuck for over 6 days, approximate $54 billion trade loss had been estimated. Available at: https://www.matec-conferences.org/articles/matecconf/pdf/2021/08/matecconf_istsml2021_01019.pdf

[7] FTSE 100 Statista Analysis. Available at: https://www.statista.com/statistics/1103739/ftse-100-index-uk/#:~:text=On%20the%2023rd%20of%20March,2020%20and%20early%20June%202020.

[8] Available at: https://ihsmarkit.com/country-industry-forecasting.html?id=106596127

COVID-19 Timeline (Scotland)



2.4 Economic Impact of COVID-19

2.4.1 This section analyses the impact of the pandemic on the United Kingdom (UK), Scottish and Glasgow economies respectively.

United Kingdom

2.4.2 Figure 2 shows the effect COVID-19 had on UK Gross Domestic Product (GDP) – the total monetary value of all the finished goods and services produced within a country.[9] A sharp decline can be seen starting in Q1 2020, carrying through to the following quarter, reflecting the nationwide lockdown. This was followed by strong growth over quarters 3 & 4 2020, with Government fiscal support a notable feature at this time, combining with the removal of some restrictions. 2021 is marked by gradual improvement again linked to eased restrictions and the vaccine rollout.

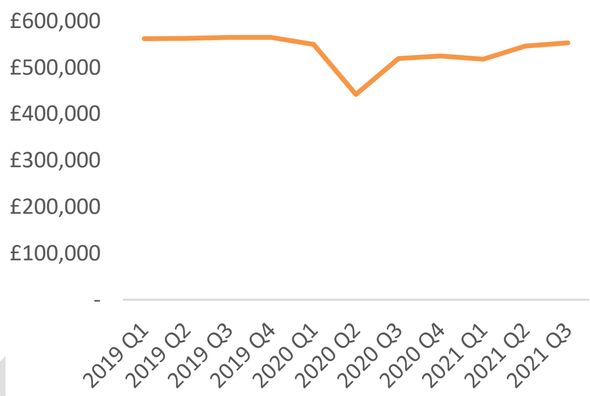


Figure 2: GDP Pre and Post COVID-19

2.4.3 The reduction in economic activity is also evident in a sharp decline in job vacancies across the UK (Figure 3). Many businesses reassessed staffing needs in light of extreme uncertainty. However, job vacancies rose sharply as labour market behaviour adjusted, largely because of updated expectations about the future.

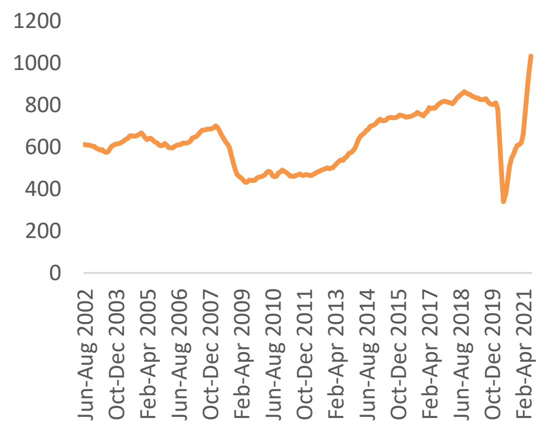


Figure 3: UK Job Vacancies 2002-2021 (Thousands)

2.4.4 The reduction in demand for goods and services meant that employee numbers in some sectors fell markedly increasing short term labour market capacity as people sought alternative opportunities. More recently, staff retention levels have fallen and this, coupled with an acute skills shortage, has produced labour shortages in professional services and other sectors. Both of these factors have been further accentuated by Brexit.

2.4.5 The effects on related earnings were slow to materialise. Between April 2019 and April 2020, earnings remained unchanged nominally, and fell by 0.9% in real terms (i.e., accounting for inflation). However, as the UK emerges from the pandemic the demand for skilled labour has increased.[10] Business have had to respond by raising wages to attract skilled staff. Median

[9] GDP is a broad measure of overall domestic production, it functions as a comprehensive scorecard of a given country's economic health.

[10] When adjusted for inflation, they increased 3.6% in real terms over the year.

weekly pay for full-time employees was £611 in April 2021, up 4.3% on a year earlier; this is the highest level of growth since 2008.[11]

Scotland

Overview

2.4.6 Scotland's economy, like all parts of the UK, has witnessed a similar pattern of slower growth. However, with a higher proportion of public service-related employment, this has provided a degree of shelter from the economic impact of the pandemic.

2.4.7 Overall, Scotland's GDP grew by 4.7% in real terms during the second quarter of 2021, compared with UK growth of 4.8%, with trade volumes in England also benefitting from an earlier removal of restrictions.

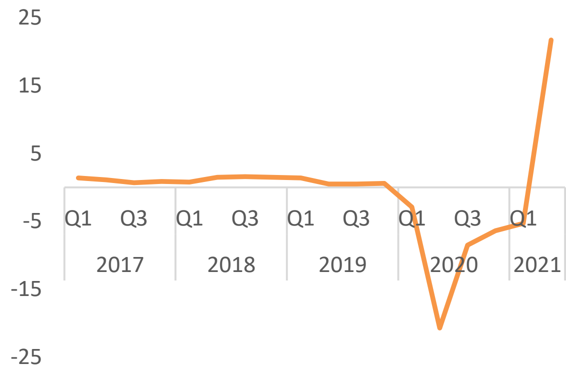


Figure 4: Scottish GDP % Change on Previous Year

2.4.8 In December 2021, Scotland's onshore GDP (which does not include offshore oil and gas extraction) was estimated to have fallen by 0.4%.[12] Output in all sectors of the economy remains slightly below pre-crisis levels despite the stimulus over the summer following the relaxing of coronavirus restrictions. However, the onset of the Omicron variant in late November led output in consumer facing services to fall by 2.5% in December.

2.4.9 In output terms, the largest sectoral drivers of growth, prior to December, were from revived activity in hospitality, arts and recreation, as well as a surge of health care appointments following the easing of restrictions.

Turnover

2.4.10 Figure 5 shows the turnover impact on Scottish business by key sector[13].

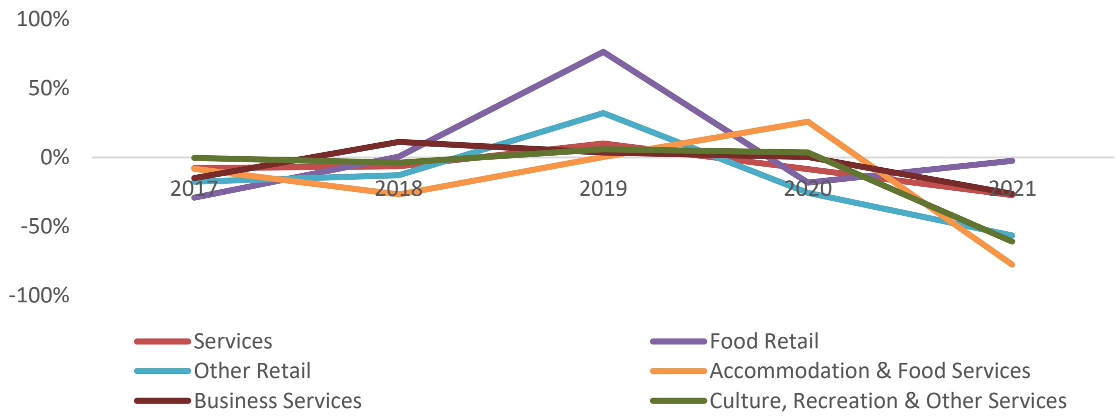


Figure 5: Scottish Business Turnover (% Change on Previous Year)

[11] Employee earnings in the UK: 2021. Available at: https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/earningsandworkinghours/bulletins/annualsurveyofhoursandearnings/2021

[12] GDP Monthly Estimates. Note, December 2021 estimates are provisional. Available at: https://www.gov.scot/publications/about-gdp/?utm_source=redirect&utm_medium=shorturl&utm_campaign=gdp

[13] COVID-19 in Scotland (data.gov.scot)

2.4.11 While these figures are not at Study Area or Local Authority level, they are considered largely representative of Glasgow's performance as Scotland's largest city and second largest contributor to Scotland's economy.[14]

2.4.12 Scotland has witnessed trends similar to those seen at UK level. The data shows that customer facing sectors such as leisure, retail and entertainment have seen a sharper decline and slower recovery.

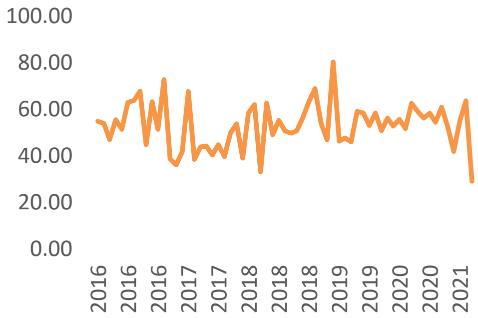


Figure 7: Food Retail (Turnover Index)

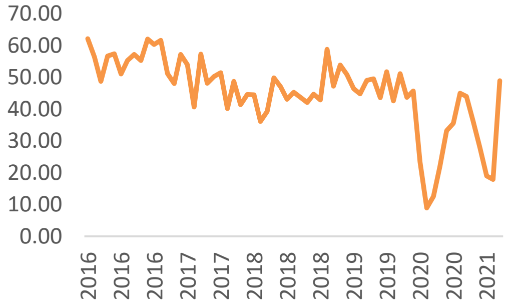


Figure 6: Other Retail (Turnover Index)

2.4.13 This is reflected in the differing turnover between food retail and other forms of retail. Bricks & mortar retailing has been affected most by lockdown measures and has struggled to recover. Despite that, food retail turnover has recovered beyond pre-pandemic levels, thanks in part to online delivery services.

2.4.14 A large proportion of the business space in the Study Area is devoted to cultural, leisure and retail offers. The extent of the City Centre's employment reliance on retail and leisure sectors (7% - see Table 15) would indicate increased vulnerability to the impacts of the pandemic. In these sectors, the significant fall footfall, related consumer spending and reduced confidence has weakened the financial sustainability of several businesses and generated redundancies.

2.4.15 A similar picture is evident in Scotland's accommodation sector, reflected again in the scale of employment within the Study Area (9% - see Table 12). With travel restrictions in place and the UK's borders effectively closed during the first lockdown and throughout 2020, occupancy levels and associated revenue fell dramatically. While supported in part by furlough and rates relief, many businesses still faced ongoing revenue costs including rent, utilities payments and maintaining skeleton staff to maintain and secure premises. Further analysis of Glasgow's accommodation sector is found at section **Error! Reference source not found.**.

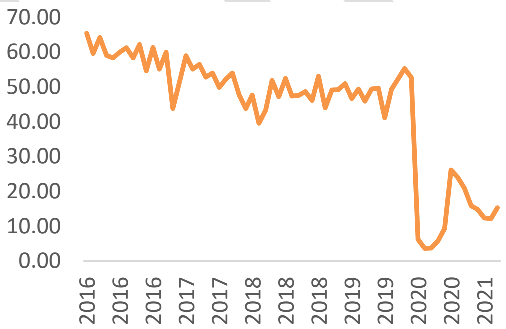


Figure 9: Accommodation (Turnover Index)

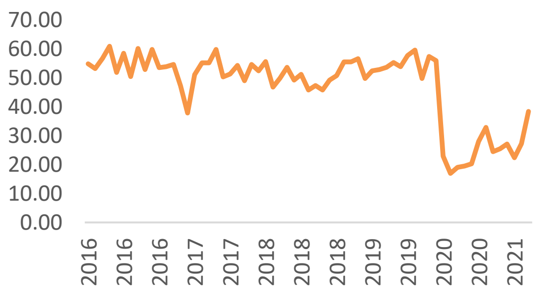


Figure 8: Culture and Recreation (Turnover Index)

2.4.16 Scotland is a growing hub for the creative industries. More specifically, Glasgow is becoming an increasingly established film location attracting low-budget independent movies and high-end location-based filming. The grid patterned city centre often doubles as New York, its steep

[14] Glasgow contributed 15.1% to Scotland's gross value added (GVA) in 2019, while Edinburgh contributed 16.4%.

hills as San Francisco, and the interior of City Chambers as a 19th century palace or the Vatican.

2.4.17 However, over past two years most production was suspended, and streaming services were among the pandemic 'winners'. Streaming service subscriptions rose quickly, aided by the restrictions imposed by COVID, and grew from 642m in 2019 to 1.1bn in 2020, an increase of some 71%. The number of streaming service subscribers is anticipated to grow to 1.6bn by 2025, a further 45% increase. While some postproduction and VFX work were able to continue in studio environments or remotely, physical production only resumed in July 2020. Despite the interruption, the industry showed strong recovery in the final quarter of 2020, recording the third highest 3-month spend on record for film and high-end TV.[15]

2.4.18 Recent research conducted by Stantec on Glasgow's film & tv market has shown local production companies are finding it increasingly difficult to recruit locally, and to retain crew at all levels. This has been in part influenced by the pandemic's effect in shifting labour patterns. Screen Scotland has estimated that between 1,130 and 1,800 jobs need to be filled in the Scottish screen sectors, including new roles and replacement positions[16].

2.5 National Responses

2.5.1 The UK Government created specific programmes to offset the negative impacts of lockdown measures.

Furlough

2.5.2 Arguably the most critical financial response from the UK Government was the Coronavirus Job Retention Scheme (CJRS), a furlough scheme announced on the 20th of March 2020. It provided grants to employers to pay 80% of employees' wages up to a total of £2,500 each month. It was extended several times until closing on the 30th of September 2021.

2.5.3 Its main aims were to minimise unemployment, redundancy, and related disruption to the labour market. In total, 11.7 million jobs were furloughed, costing the Government £70 billion. The number of people on furlough peaked at 8.9 million on 8 May 2020. Levels then fell steadily until November 2020 when a second lockdown was announced. Numbers rose again at the beginning of the third lockdown in January 2021 but remained well below first lockdown levels.[17]

2.5.4 Some sectors of the economy made more use of the scheme than others. Non-essential shops such as clothing, toy, and electronics shops, were closed during lockdowns. The wholesale and retail sector had the most furloughed jobs in March and April 2020, peaking at 1.85 million. These numbers quickly fell as shops re-opened.

2.5.5 In comparison, the numbers furloughed in the arts, entertainment and recreation sectors remained more static, as much of the sector remained under restrictions. Pubs and restaurants were particularly badly affected by restrictions and the accommodation and food services had the highest value of claims overall, totalling £12.87 billion.

2.5.6 Younger workers were more likely to be employed in sectors worst hit by initial lockdown measures: 41% of under 18s were furloughed as of 1 July 2020, followed by 18–24-year-olds at 28%. As these sectors opened, the take-up rate for younger workers declined markedly. Despite this, there may be long-term impacts on the career development of these cohorts due to limited access to graduate and related job opportunities throughout the peak of the pandemic. Interestingly, the figures also show the number of Scottish applicants from the most

[15] Stantec analysis on the UK Film and TV Industry 2020.

[16] Screen Scotland (2019). Scotland's Screen Skills Research.

[17] HMRC, CJRS Furloughed employments by country, region and sector.

deprived areas applying to UK higher education institutions increased by 11%, the relative lack of entry level employment opportunities possibly a contributory factor.[18]

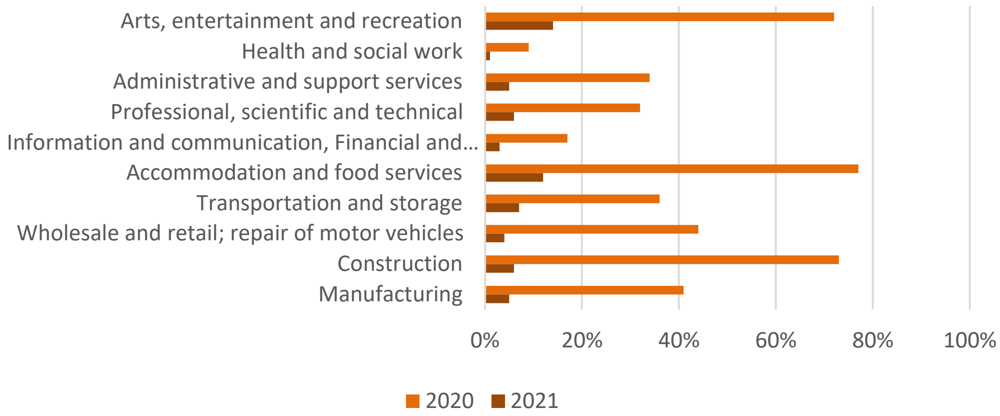


Figure 12: Scotland Furlough Take-Up per Sector Aug 2020 v Nov 2021

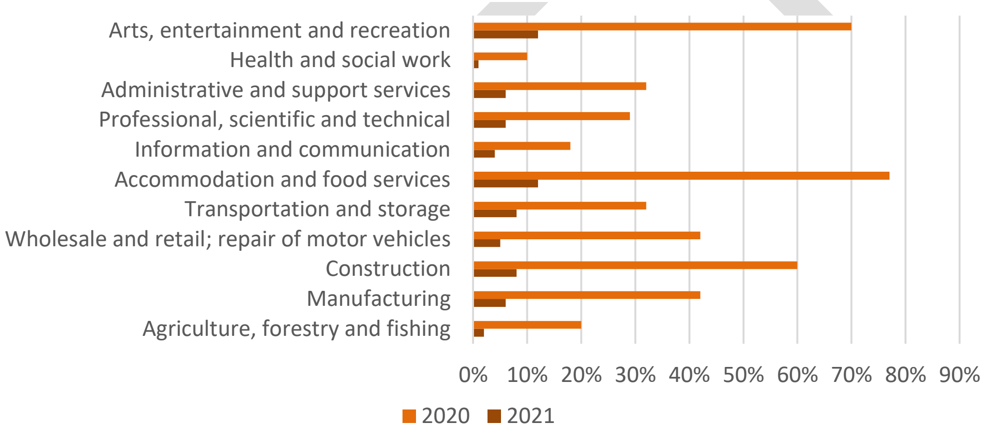


Figure 11: UK Furlough Take-Up per Sector Aug 2020 v Aug 2021

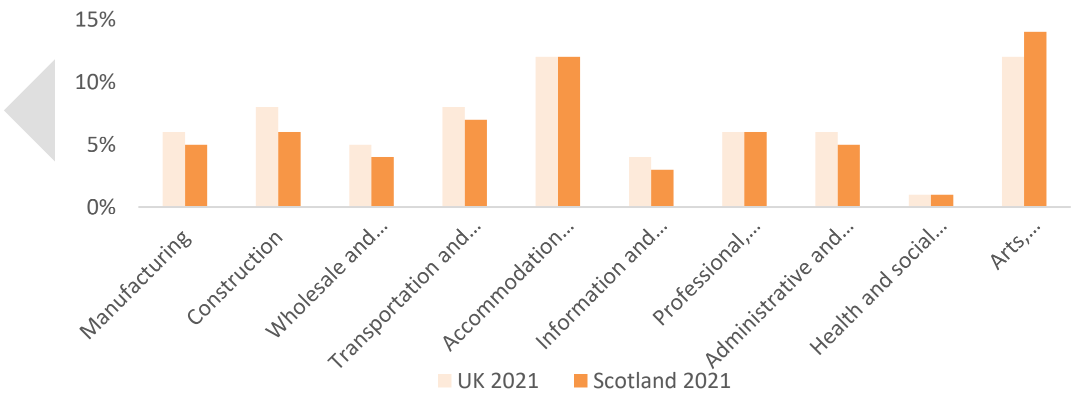


Figure 10: CJRS Scotland & UK Comparison

2.5.7 The figures above show the percentage of workers in key industries accessing the scheme. Specifically, they compare furlough rates across key sectors at the height of the pandemic and one year later, in Scotland and the UK.

[18] Applicants to Scottish universities at record high. Available at: https://www.gov.scot/news/applicants-to-scottish-universities-at-record-high/

2.5.8 Comparing the proportion of workers claiming furlough in Scotland a year apart helps indicate hardest hit sectors and those taking longer to recover. Correlating with sector turnover (Figure 8), the Arts, Entertainment & Recreation sectors in Scotland have been the hardest hit, with 14% of the workforce (or 6,500 employees) still claiming furlough at the end of the scheme closure.

2.5.9 In the Accommodation and Food Services sectors, 12% of the workforce (or 17,300 employees) were still claiming furlough in November 2021. Consultation with both sectors in the City throughout December 2021 indicated that further restrictions on socialising over the Christmas period due to the Omicron variant, were likely to cause significant damage. One hotelier noted over 20 Christmas parties were cancelled across their venues in Glasgow at an estimated loss of £0.75 million.

2.5.10 Conversely, the Construction sector in Scotland was significantly affected at the start of the pandemic, with an estimated 73% of the workforce on furlough in November 2020, dropping to just 6% the following year (or around 7,300 employees).

How Successful Was Furlough?

2.5.11 The scheme is widely considered to have been successful in limiting potential redundancies during the pandemic[19]. In April 2020, the Office for Budget Responsibility predicted unemployment would peak at 10% in 2020. It peaked at 5.2%, 2.5 percentage points below that seen in the European Union (7.7%).[20][21]

2.5.12 The scheme cost the UK Government some £70 billion and came at an average cost of £5,983 per position furloughed. However, its has met mixed reactions. The Institute for Fiscal Studies (IFS) found the CJRS "protected most jobs"[22] , while the Financial Times spoke of the mixed success of the scheme, observing that while it preserved jobs, it may have prevented workers being reallocated to growing sectors[23].

2.5.13 The furlough scheme did not protect all jobs. According to the IFS, around 1 million people were made redundant between April 2020 and June 2021. This compares with 550,000 for the same period in 2019[24].

2.5.14 Due to the speed with which it was implemented, there were also opportunities for fraud. HMRC estimated in September 2020 that between 5% and 10% of payments were fraudulently claimed (equivalent to some £3.9 billion). The estimate will be updated and HMRC expect to recover over £1 billion in fraudulent payments over the next two years[25].The recovered revenue could potentially provide sector specific support in the future.

Self-Employment Support Scheme

2.5.15 The Self Employment Income Support Scheme (SEISS) was announced 6 days after CJRS and was designed to ensure the self-employed were catered for. Similarly, it paid 80% of

[19] Available at: https://commonslibrary.parliament.uk/examining-the-end-of-the-furlough-scheme/

[20] Available at: https://www.adsgroup.org.uk/blog/economics/obr-coronavirus-reference-scenario-april-2020/

[21] The unemployment rate of the European Union was 7.7% in September 2021. Available at: https://www.statista.com/statistics/685957/unemployment-rate-in-the-european-union/#:~:text=The%20unemployment%20rate%20of%20the,when%20it%20was%2012.1%20percent.

[22] Available at: https://www.instituteforgovernment.org.uk/publications/furlough-scheme

[23] Available at: https://www.ft.com/content/505e69e5-8e04-4cd2-ac44-804e507105c7

[24] Available at: https://ifs.org.uk/publications/15644

[25] Available at: https://www.nao.org.uk/report/implementing-employment-support-schemes-in-response-to-the-covid-19-pandemic/

profits up to £2,500 monthly to those whose trading profit was less than £50,000 in the 2018-19 financial year (or an average of this over the last 3 years)[26].

2.5.16 The scheme has faced criticism in its design for being poorly targeted and unnecessarily expensive[27]. However, the task was made more difficult due to the weakness of existing frameworks e.g., an outdated tax recording system, which meant Government lacked the data necessary to target funds more precisely.

Eat Out to Help Out

2.5.17 The Eat Out to Help Out scheme was announced on 8th July 2020 to boost the struggling hospitality sector, despite warnings from epidemiologists. The policy aimed to help businesses reopen and boost demand in the sector by offering 50% off the price of food and non-alcoholic drinks up to £10 per person, from Mondays-Wednesdays in August 2020. This policy was implemented exactly 31 days after restaurants were allowed to open at limited capacity.

Table 2: Eat out to Help Out Claims – Regional Analysis

	Total number of outlets claimed	Total number of meals claimed for	Total amount of discount claimed (£)	Average amount claimed per outlet (£)	Average discount per meal (£)
England	50,592	90.0m	£517.1m	£10,200	£0.0m
Wales	2,720	4.5m	£25.0m	£9,200	£0.0m
Scotland	4,775	7.2m	£42.9m	£9,000	£0.0m
Northern Ireland	1,810	4.6m	£25.9m	£14,300	£0.0m

2.5.18 Across the UK throughout July, Food and Beverage Service activities grew in volume by 99%. However, this still left activity at 57.4% of pre-COVID levels. The parliamentary constituency of Glasgow Central recorded a relatively high number of meals, based on the number of outlets, whereas Edinburgh North & Leith recorded relatively fewer meals per outlet. Furthermore, Glasgow Central constituency also recorded a relatively high discount per meal.[28] The data therefore suggests that Glasgow and its restaurant customers benefited more from the scheme than counterparts in Edinburgh.

Other Support

2.5.19 The UK government also rolled out several business grants and loans, including:

- **Non-domestic Rates Relief:** Governments introduced non-domestic rates relief packages. In Scotland, this included a 1.6% universal relief in 2020-21 to reverse the annual poundage increase and 100% relief for retail, hospitality, leisure and aviation for 2020-21 and 2021-22.

- **Retail, Hospitality, and Leisure Grant Fund (RHLGF):** offered businesses in these sectors who had property with a rateable value of £15,000 or under a grant of up to

[26] Available at: https://www.gov.uk/guidance/claim-a-grant-through-the-coronavirus-covid-19-self-employment-income-support-scheme

[27] Available at: https://www.theguardian.com/uk-news/2020/oct/24/sunaks-12bn-scheme-for-self-employed-was-terribly-targeted-says-analysis

[28] Available at: https://www.gov.uk/government/statistics/eat-out-to-help-out-statistics-geographic-breakdown/eat-out-to-help-out-statistics-geographic-breakdown-commentary

£10,000. Those with who had property with a rateable value of over £15,000 but less than £51,000 could claim up to £25,000. This ran from April to October 2020.

- **Small Business Grant Fund (SBGF):** offered small businesses who pay little or no business rates a one-off cash grant of £10,000 from their local council.
- **Coronavirus Business Interruption Loan Scheme (CBILS):** was targeted at SME's and was also a corporate financing facility for large companies that offered up to £5 million and guarantees 80% of finance to the lender, paying interest and any fees for the first 12 months.
- **Bounce Back Loan Scheme (BBLS):** offers financial support to businesses who lost revenue and saw their cash flow disrupted as a direct result of the pandemic. These loans came with a 100% government-backed guarantee and could take out a loan of up to 25% of their turnover or £50,000. No interest is paid for the first 12 months and when it is, it will not be over 2.5%.

Interest Rates & Inflation

2.5.20 The Bank of England kept base interest rates low to support the economy through the pandemic. Despite this, recurring lockdowns and limited spending opportunities encouraged a significant rise in saving and investment using free, online trade platforms.[29]

2.5.21 Much of this pent-up saving is now being spent as the UK opens up again following the Omicron variant. Combined with rising energy prices and constrained supply chains, the release of savings is fuelling a related rise in inflation which in turn is putting further pressure on earnings (see 2.4.5).

2.6 Glasgow's Economic Activity

2.6.1 The following sections examines the City of Glasgow's economic performance. It begins with an overview of how Glasgow was performing, relative to other areas in Scotland, the wider UK and internationally. This is followed by an assessment of key sectors in Glasgow.

Pre-Pandemic Success

2.6.2 Glasgow had more jobs per resident than any other local authority in the City Region, reflecting its status as a hub of economic activity with the ability to attract labour. It had a higher business start-up rate than the Scottish average and in recent times its economy has grown faster than that of any other UK city outside of London.

2.6.3 In 2019, it was ranked 8th from Time-Out Magazine in its list of the world's best cities to visit. The year prior, Glasgow was ranked 19th in the Telegraph's best UK cities. In 2020, the City was ranked 1st by fDi Magazine out of all large European cities for FDI strategy - a reflection of the city's ambitious vision at the time to become the UK's best performing city for inward investment by 2023.Glasgow was also ranked second-best UK Tech City in US real estate group CBRE's 2019 Tech Cities Report.

2.6.4 The reputation of the city as a place committed to progressive social action and a hub of creativity was reinforced by its growing social enterprise sector. A report by the Creative Industries Federation also found Glasgow to be Scotland's only 'creative capital'.

[29] Yahoo Finance Lockdowns Fuel Massive Growth. Available at: https://finance.yahoo.com/news/uks-second-largest-broker-trading-172024649.html?guccounter=1&guce_referrer=aHR0cHM6Ly93d3cuZ29vZ2xlLmNvbS8&guce_referrer_sig=AQAAAKInmB719B0IF6TmgNdpfciEbxlQCAvKYc8jrWgM3niDvJ7cInofcG88gB2nmZlcpkBTluldOrftupvbjrwjmOjRE-32OVboB5HvfcRPi_86ja94XEj_BkiDNfaCggu9PAEiRRh5e5qvqpM469rjeIqBXZvKUdYkpZub7aybdgtL

2.6.5 Glasgow has a large talent pool and strong academic culture, 46% of students stay in the city to work after university, one of the highest retention rates in the UK.

Sector Performance

2.6.6 The data analysed in this section covers the Glasgow City Council area. Note, that data for 2020 does not get publish until May 2022. Analysis of sector key performance in the Study area can be found in the Section 4 – Economic Impact Analysis.

2.6.7 The overall sectoral picture (Figure 13) shows human health and social work as the most productive sectors followed by finance, IT, and real estate.

2.6.8 The least productive sectors were transportation & storage, accommodation and food service activities, arts, entertainment, and recreation. It was indeed these less productive sectors that were most heavily hit by the pandemic.

2.6.9 Trends pre-pandemic across key sectors in Glasgow are similar to those seen in other major UK cities. Significant growth in IT and communication can be seen along with finance and insurance sectors, but aside from that most sectors witnessed growth in line with national and regional trends.

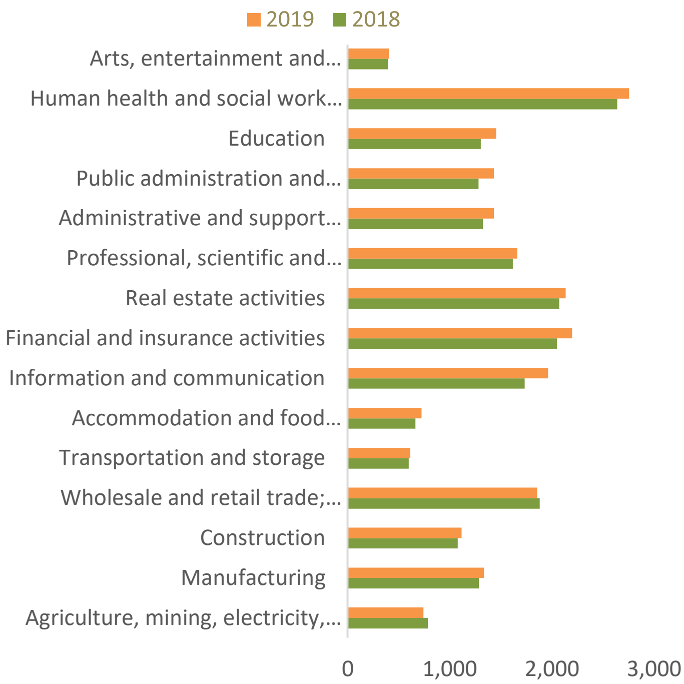


Figure 13: GVA per Sector in City of Glasgow

Business Counts

2.6.10 As can be seen from Figure 13, the number of active enterprises in Glasgow City Centre was growing at a steady rate year on year.[30]

2.6.11 The average annual increase in active enterprises pre-pandemic was 2.8%, largely driven by Small and Medium-sized Enterprises (SMEs).

2.6.12 As expected, the number of registered enterprises dropped slightly (-0.3%) as the pandemic and the uncertainty that came with it hit, putting many out of business.

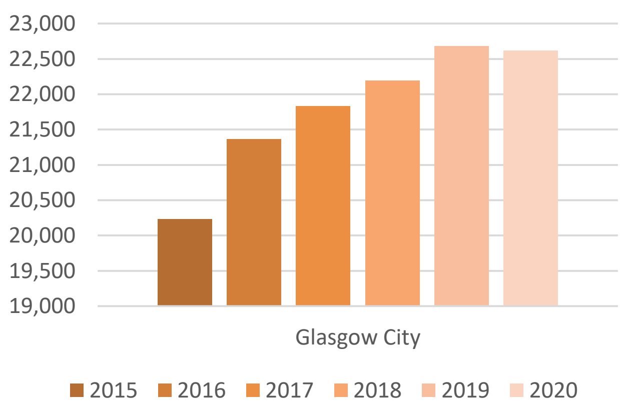


Figure 14: Count of Active Enterprises (Glasgow City)

[30] UK Business Counts data is produced at the Scottish Intermediate Zone spatial level and Intermediate Zone 75 (S02000658) covers the city centre area encompassing the various Districts

2.6.13 Further information on enterprise performance can be found in Table 3. The data provides additional evidence that the number of new business ('births') fell from 2019 to 2021, as did the number of closures. Critically, however, the number of births remained above the number of deaths, influenced by the availability of Government support measures (see section 2.5). Without them, it is likely that the enterprise count in the City would have been much lower in 2020/21.

Table 3: Births and Deaths of New Enterprises Pre- and Post-Lockdown

	2019	2020	% Change
Births of New Enterprises	3,465	2,795	-19%
Deaths of New Enterprises	2,645	2,440	-8%

Pre-Pandemic Issues

2.6.14 Delving deeper into Glasgow's local economic performance, the results become mixed. Glasgow was a hub of economic activity, strong ambition, and growth but still struggling with an undercurrent of socio-economic problems, particularly for its resident population. It was a city with a centrifugal pull-on labour with many people commuting across the Central Belt into the City for work and an extremely attractive place for inward investment. However, it struggled to address skills shortages of its resident populations, limiting the number of opportunities for many residing there.

2.6.15 Key statistics such as Scotland's economic activity rate prior to the pandemic provides evidence of this.

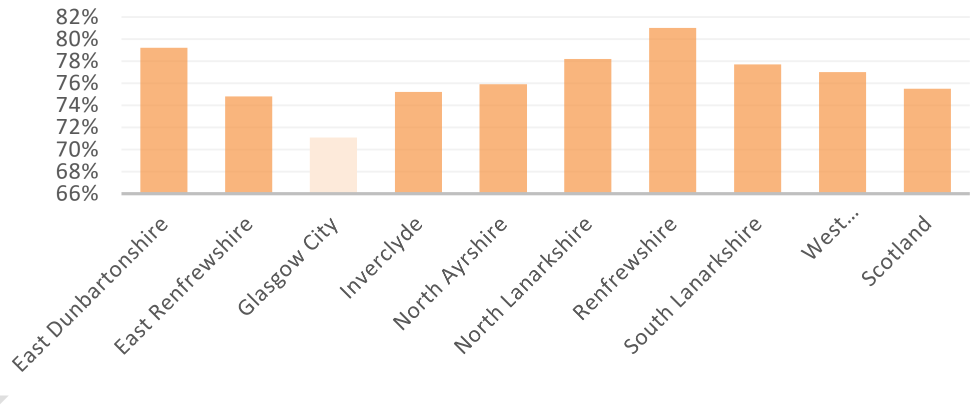


Figure 15: Economic activity rate - aged 16-64 (2019)

2.6.16 While the City performed well in attracting external talent, the lack of opportunities for those in disadvantaged groups or areas ultimately meant many residents struggled as the pandemic took hold. This is seen by the City's extremely high instance of poverty and as a result, a host of health and social issues:

- In 2018, 26% of households had no adults in employment, the highest rate of any UK city.
- According to the SIMD, in 2019, nearly half of Glasgow's residents lived in the most deprived 20% of areas in Scotland.
- 26% of dwellings in Glasgow were in an urgent state of disrepair and around 6 out of 10 Glasgow residents lived within 500m of derelict land, double the Scottish average.

2.6.17 The tension and polarity between Glasgow's positive drivers of growth and the negative force of lag was recognised as an issue in Glasgow's Economic Strategy 2016-2023. In response, the City Council set out a vision to become the UK's most productive city in the hope of remedying Glasgow's key social and economic ailments.

3 City Comparison

3.1 Introduction

3.1.1 This section of the report examines and compares the impact of the pandemic on three major cities in the UK, Leeds, Edinburgh, and Manchester, against Glasgow. It succinctly summarises full case studies of each city's performance (Appendix B Appendix C Appendix D

3.1.2 The case studies provide insight and highlight the responses of Government and Local Authorities thus far to power city centre recovery post-pandemic, particularly amid COVID-19 accelerated trends in remote working, digital transformation, and online shopping.

Leeds

Pre-Pandemic

- **Diverse Economy:** Leeds has one of the most diverse economies in the UK, with several sectors contributing similar proportions to the City's GVA in 2019. Like Glasgow, the City's sector composition is broadly based on highly skilled sectors which account for 44%of GVA (Glasgow = 52%).

- **Yorkshire's Economic Centre:** Leeds is also the economic centre of Yorkshire and has one of the busiest transport hubs in the north of England. The City is very well connected to major cities in the UK by a network of motorways and one of the busiest railway stations in the north of England. However, the City's performance was and still is undermined by poor city-suburb connectivity and challenges related to its networks of legacy highways and railways which emphasised its lack of green space.

- **Visitor Destination:** Excellent connectivity is likely to be the stimulus behind the City's 27 million leisure tourist visits in 2016m generating over £1.6bn for the City. The following year it was ranked fifth on Lonely Planet's Best In Europe 2017 list.

- **Inward Investment:** A recent report on the impact of the pandemic on Leeds City Centre, highlighted that inward investment into the City Centre accelerated rapidly in recent years. South Bank, one of Europe's largest regeneration developments, will bring over 1000 businesses, 4000 homes and a new city park to the city centre, reweaving communities back into the centre.

Pandemic Impact

- **Retail Reliance:** Analysis of the City's sector composition indicates its heavy reliance on retail, which suffered severely throughout successive lockdowns. On average, businesses in City Centre lost 39 weeks of sales during the pandemic compared to the UK's average of 35 weeks of lost sales

- **Visitor Spend:** Out of Glasgow (-1%), Manchester (-1%) and Edinburgh (+8%), Leeds recorded the largest drop in spend from visitors entering from outside the City (-8%), despite having the same recorded fall in visitor numbers as Manchester (-7%),suggesting the City had a heavy reliance on tourism, potentially driven by its large retail sector.

Post-Pandemic Economic Recovery

- **City Vibrancy:** Data from CGA and Wireless Social shows that sales in Leeds remain just 0.2% below pandemic levels as of January 2022. This has earned the City the title of most 'vibrant city' (from a range including Manchester, Edinburgh, Glasgow, Birmingham , London and others) London recorded sales 19.0% below pre-pandemic levels.

- **Hybrid Working Challenge:** A high-level economic model by the Future of Leeds City Centre examined three scenarios of different working-from-home assumptions. All scenarios illustrated that increased homeworking presents challenges for the city, with the 'bounce-back-to-new-normal' – office workers in 3 days a week – driving a significant return to pre-pandemic levels of economic growth. This is simply down to the correlation between increased weekday footfall and related additional spend to support other (non-office based) sectors. On the other hand, 'wide-spread-working-from-home' – office workers in just 2 days a week – would mean City spend is displaced to local centres in West Yorkshire (i.e., people spend money in their local areas rather than in the City).

Edinburgh

- **Leading City:** Edinburgh is one of the UK's fastest growing cities. In 2019, its gross value added (GVA) per capita was £46,024 compared to the Scottish average of £26,967. Pre-pandemic, Edinburgh's GVA had grown at an average of 4.7% since 2015, surpassing that of the UK and Scotland at 3.5% and 2.6% respectively. This had cemented the City's place as the top contributor to the Scottish economy.

- **Highly Skilled Workforce:** The City's sector composition is based on highly skilled sectors which account for 57% its GVA (Glasgow = 52%).

- **Visitor Destination:** Nationally significant events such as the Edinburgh Tattoo and Festival, centred around Edinburgh Castle as their centre piece, has allowed the capital to excel as one of the UK's leading cultural and entertainment centres.

- **Vitality Index:** In January 2019 Edinburgh was named the best city in the UK for economic growth prospects using the Vitality Index - a measure of education, entrepreneurialism, affluence, productivity, growth, and environmental factors.

Pandemic Impact

- **Short-Term Impact:** Early on, as the first lockdown was introduced, the City's footfall dropped to below 10% of pre-pandemic levels. On average, businesses in City Centre lost 43 weeks of sales during the pandemic compared to the UK's average of 35 weeks of lost sales.

- **'Staycations':** Edinburgh's position as a key leisure destination meant that it experienced sharp rises in footfall as staycations became increasingly popular in the UK. Out of Leeds, Manchester and Glasgow, it is the only city to record a rise in both visitors and related spend from outside the City in 2021.

Post-Pandemic Economic Recovery

- **Footfall Recovery:** Edinburgh had the highest footfall levels post-pandemic relative to Glasgow, Manchester, and Leeds, undoubtedly boosted by the August festivals. This highlights the fact that quality cultural & leisure offerings have been critical to the recovery of footfall levels, related spend and economic growth.

- **Return to Work:** Edinburgh has seen a significant fall in the number of benefit claimants, while the increase in job postings has remained below average. The low claimant count suggests the City has been relatively protected from pandemic effects, perhaps because many workers have continued to work from home. Slow job posting recovery could signal a challenge for policy in the longer term, particularly if workers do not return to offices and postings in supporting services sectors do not bounce back fully.

Manchester

Pre-Pandemic

- **High Productivity:** In 2019, Manchester's GVA per capita was £62,000 compared to London's per capita average of £51,015, indicating the City's position as a key driver of economic growth in the north of England. Manchester's GVA was growing at an average of 6% per annum, significantly above that of London at 4.1% and the UK at 3.5%.

- **High Job Growth:** The number of jobs in Manchester grew by some 85% from 1998 to 2017, with 70,000 jobs added in this period, mainly in knowledge-based services. The significant pace of growth can be linked to the City's declining commercial vacancy rate and corresponding strong employment growth in both public and private sectors, posting greater than 15% jobs growth (2015-2019).

Pandemic Impact

- **Local Commuters Reliance:** Unlike the other 3 cities, pre-pandemic, businesses in Manchester relied on people from the city suburbs for their income more than they did from tourists. This is evidenced by the City's estimated loss of 41 weeks of sales during the pandemic, compared to UK average of 35 weeks of lost sales.

- **Variant Effects:** The latest data in early January 2022 shows a large drop in footfall of almost 40% compared to January 2019 levels, indicating that the Omicron outbreak in December had a dampening effect on the recovery momentum.

Post-Pandemic Economic Recovery

- **Return to Work:** Manchester's high-skills employment base means Working-From-Home is likely to be widely adopted and prolonged, explaining the persistence of lower Weekday footfall levels.

- **Low Job Growth:** Benefit claimant rates in Manchester haven't decreased below the average, while job postings in the City are also lower than the average. This indicates that the City is in a more fragile economic position and that employment growth has been slow to recover.

3.2 Discussion

3.2.1 Prior to the pandemic, each City was performing well. Job and related GVA growth was high. The workforce in Glasgow, Edinburgh, and Manchester was weighted towards higher-skilled employees (>50%), which had differing impacts on their economy and wider region.

3.2.2 Typically, office based, this section of the workforce quickly shifted to remote working. This still allowed them to generate value for the organisations they worked for (which were still registered in the respective cities), while shifting their spending to local areas (i.e., displacement). On the other hand, higher levels of office-based employment led to significant drops in morning, lunchtime, and evening footfall. In turn this had a significant and prolonged impact on the hospitality sector in each city.

3.2.3 While Leeds had a high proportion of high-skilled employees prior to the pandemic, it also had a high reliance on retail-based employment (and contribution to GVA). As sectors with higher instances of human contact were fluctuating between being open and closed, this over reliance proved damaging to the Leeds economy. It has, however, allowed for spikes in growth throughout the pandemic, particularly in the run up to Christmas 2021 and 2022.

3.2.4 Edinburgh too has a large reliance on retail, which in the initial stages of the pandemic prove to be a weakness of the City. However, as staycations became the norm, the City was able to capitalise on its strength as a popular visitor destination.

3.2.5 The interaction between job posting recovery and the claimant count rate — a measure of the number of people claiming benefits primarily because they're unemployed — is an indication of the health of local labour markets. Figure 17 below shows a comparison between the % change in benefit claimant count versus the % change in job postings between January 2020 and January 2022 across each of the four cities. The red lines indicate an average between the four.

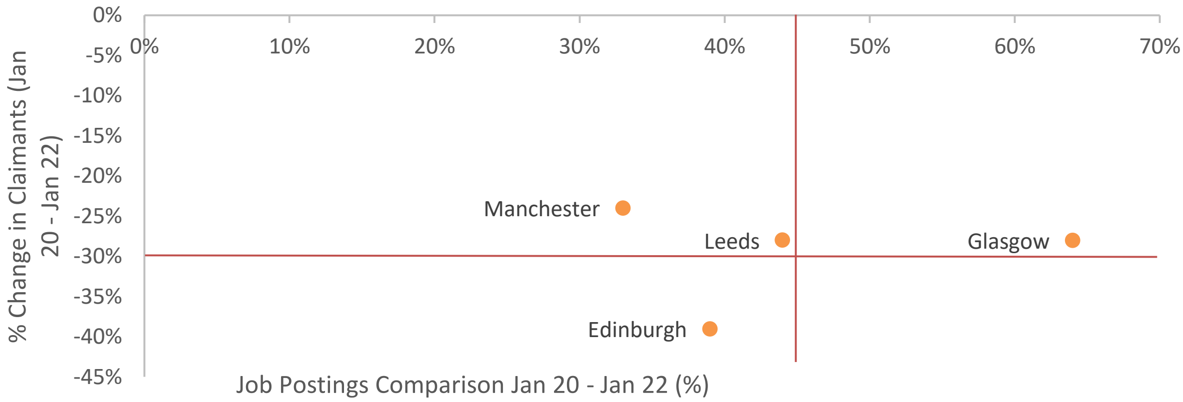


Figure 16: Claimant count rate and job posting recovery by city

3.2.6 Edinburgh's significant reduction in claimant count and close to average % change in job postings, suggests the City is recovering well. Specifically, it indicates a high proportion of employment in supporting service sectors (linked to its status as a key visitor destination) is helping the City recover faster than the others analysed. The same is true of Leeds, which has seen a strong retail recovery relative to the other cities.

3.2.7 Manchester has struggled to reduce its claimant count, and job postings have also been slower to recover than the other analysed cities. The City is both a tourist destination and place with high work-from-home propensity which has left it vulnerable to the shocks caused by the pandemic. This type of composition indications that a return of workers to offices might be all that's needed to unlock labour markets in the City.

3.2.8 The results indicate that Glasgow is performing well in respect of the drop in the claimant count rate. However, the high level of job postings indicates that the City is struggling to match available job opportunities with its workforce. This is likely to be in supporting service sectors such as hospitality which has seen a significant loss in employment (see Table 13).

4 Economic Impact Assessment

4.1 Introduction

4.1.1 The following section sets out the estimated economic impact of the pandemic on the Study Area. It also sets out the methodology of the assessment and provides commentary on this estimate based on key sectors in the Study Area.

4.1.2 This is followed by an assessment of the economic health of various key sectors in the Study Area pre-pandemic and then discusses the effects and thus condition of these sectors thereafter. These sectors were chosen based on the importance of the economic role they play in the City.

4.2 Context

4.2.1 Glasgow was a buoyant and busy city before the pandemic hit. It was successful in attracting investment and there was a strong development pipeline, particularly in the office sector. However, Glasgow's reliance on these sectors: office, retail, events, and higher education meant that when restrictions were put in place that hit 'customer facing' industries, footfall fell sharply.

4.2.2 The combination of Glasgow's low residential density and its sector composition meant there was little reason to be in the city centre, particular for business travel (e.g., conferences and meetings). This contrasts with cities, such as Edinburgh, that had complementary strengths in leisure tourism that benefitted through staycations. Glasgow's heavy reliance on business related tourism meant the nature of COVID-19 restrictions hit the city harder in comparison to Edinburgh with its focus on leisure tourism.

4.2.3 Furthermore, relative to English cities, Glasgow also had to endure prolonged restrictions on movement and social interaction.

4.3 Methodology

Gross Value Added (GVA)

4.3.1 The economic impact of the pandemic on the City Centre is estimated using Gross Value Added (GVA). It measures the contribution to the economy of each individual producer, industry or sector in Scotland. It is defined as the difference between the value of goods and services produced and the cost of raw materials and other inputs, which are used up in production.

4.3.2 National reports and news cycles will tend to publish Gross Domestic Product (GDP) – a national measure of economic performance. In this analysis, GVA is used because GDP is not available at a regional, intermediate zone, and thus Study Area level. However, the two statistics are linked. GVA adjusts GDP by the impact of subsidies and taxes (tariffs) on products, shown in the formula below.

$$GVA = GDP + subsidies\ on\ products - taxes\ on\ products.$$

4.3.3 The estimated impact is calculated by deducting the estimated GVA for 2020 and 2021 from the projected GVA estimate prior to the pandemic (i.e., the pre-pandemic trend).

Data Limitations

4.3.4 Four data limitations required to be addressed:

Limit 1: Data Granularity

4.3.5 The City Centre combines 9 District Regeneration Framework (DRF) areas. The DRFs are not official statistical spatial geographies and as such, GVA is not published at this level. It is only published as granular as intermediate zones, which are an accumulation of the data zones mentioned in 2.2.3. Due to their larger size, intermediate zones do not map directly to the Study Area / DRF boundary. For example, while the Calton and Gallowgate – 03 data zone is within the City Centre, the entire Calton and Gallowgate intermediate zone would extend to Bridgton.

4.3.6 The analysis has therefore concentrated on the City Centre East (S02001932), City Centre West (S02001933) and City Centre South (S02001934) intermediate zones, as shown by Figure 18 below.

4.3.7 While the City Centre East intermediate zone covers areas outside the traditional City core (capturing Glasgow Royal Infirmary), this is still within the Learning Quarter and Townhead Districts as shown in Figure 1.

Figure 17: Impact Analysis Area

Limit 2: Time

4.3.8 GVA is only available until 2019 at intermediate zone level (see Table 4 below). To resolve this, the analysis applies the national GVA index for 2020 and 2021 published by the Scottish Government, to the City Centre areas.

Table 4: City of Glasgow and City Centre GVA

	2015	2016	2017	2018	2019
City of Glasgow GVA	£19,376.5m	£19,826.6m	£20,712.6m	£21,106.0m	£22,175.9m
	2015	2016	2017	2018	2019
City Centre East	£1,247.4m	£1,269.8m	£1,289.7m	£1,613.3m	£1,724.8m

	2015	2016	2017	2018	2019
City Centre West	£796.4m	£740.8m	£771.4m	£1,088.0m	£1,196.0m
City Centre South	£5,834.4m	£5,664.4m	£5,867.1m	£5,661.2m	£5,874.7m
Total City Centre GVA	**£7,878.3m**	**£7,675.0m**	**£7,928.2m**	**£8,362.6m**	**£8,795.5m**

Limit 3: Applying National Indexation

4.3.9 Applying the national indexation of GVA does not account for sectoral employment differences e.g., the concentration of retail employment in the City Centre in comparison to the rest of Scotland. To resolve this, the GVA index for Scotland has been weighted by employment in the City Centre. To reflect the anticipated impact on the retail and cultural sectors, additional breakdowns of their sectoral divisions have been calculated.

4.3.10 Furthermore, 2021 employment figures for the City Centre are not available, so the figure has been calculated using changes at the national and Local Authority level. The results are presented below.

Table 5: GVA Index and Applied Weighting

	Industry GVA Index		% Change on Previous Year		Weighted % Change on Previous Year		% Point Change Using Weighting	
Sectors	**2020**	**2021**	**2020**	**2021**	**2020**	**2021**	**2020**	**2021**
A: Production Sector	97.40	99.72	-5%	2%	-11%	5%	-7%	3%
F: Construction	90.82	94.41	-8%	4%	-1%	1%	6%	-3%
Division 45 & 46: Wholesale and Motor Trades	99.91	101.04	-4%	1%	-1%	0%	3%	-1%
Division 47: Retail trade, except of motor vehicles and motorcycles	107.56	106.55	6%	-1%	4%	-4%	-2%	-3%
H: Transportation and storage	84.46	90.93	-19%	6%	-12%	4%	7%	-3%
I: Accommodation and food service activities	69.66	96.62	-38%	27%	-44%	28%	-6%	1%
J: Information and communication	96.35	101.75	-11%	5%	-21%	10%	-10%	4%
K: Financial and insurance activities	100.73	101.36	-2%	1%	-9%	3%	-7%	2%
L: Real estate activities	101.87	102.05	-1%	0%	-2%	0%	-1%	0%
M: Professional, scientific, and technical activities	95.14	98.98	-10%	4%	-21%	7%	-11%	3%
N: Administrative and support service activities	85.76	88.94	-15%	3%	-27%	5%	-12%	2%
O: Public administration and defence; compulsory social security	103.84	105.53	1%	2%	1%	3%	0%	1%
P: Education	99.55	99.80	-1%	0%	-1%	0%	0%	0%
Q: Human health and social work activities	97.19	113.87	-4%	17%	-2%	7%	2%	-10%
Division 90: Creative, arts and entertainment activities	81.07	83.71	-25%	3%	-69%	7%	-44%	4%
Division 91: Libraries, archives, museums and other cultural activities	81.07	83.71	-25%	3%	-4%	0%	21%	-2%
Division 92: Gambling and betting activities	81.07	83.71	-25%	3%	-27%	3%	-2%	0%
Division 93: Sports activities and amusement and recreation activities	81.07	83.71	-25%	3%	-7%	1%	18%	-2%
S: Other service activities	74.92	90.14	-23%	15%	-16%	9%	8%	-6%
T: Activities of households as employers	88.60	109.14	-26%	21%	-26%	21%	0%	0%

4.3.11 As shown by the percentage point changes in the last two columns, the weightings have a significant negative impact on the national GVA index of (J) Information and communication, professional, scientific and technical activities (M), administrative and support service activities (N), and creative, arts and entertainment activities (90) sectors. This indicates a high concentration of those sectors in the City Centre, relative to the rest of Scotland.

4.3.12 Inversely, the libraries, archives, museums, and other cultural activities (91) and sports activities and amusement and recreation activities (93) sectors have lower concentrations of employment in the City Centre, relative to the rest of Scotland. Contrary to expectations, weighting the national retail trade GVA index has a minimal impact on the results, relative to other sectors.[31] While the City Centre does have a high number of retail services (6% of employment), the concentration of employment is relative to the of the rest of Scotland (10% of employment).

4.4 Analysis

4.4.1 As noted above, the estimated impact is calculated by deducting the estimated GVA for 2020 and 2021 from the projected GVA estimate prior to the pandemic (i.e., the pre-pandemic trend).

Pre-Pandemic Trend

4.4.2 The pre-pandemic trend for the City Centre has been forecast from trend GVA data extending from 1998.[32]

4.4.3 Low and Upper estimates have been provided to show the potential deviation of GVA relative to the Central estimate. This allows for sensitivity testing of the estimated impact. The results are shown in Figure 19 and Table 6 below.

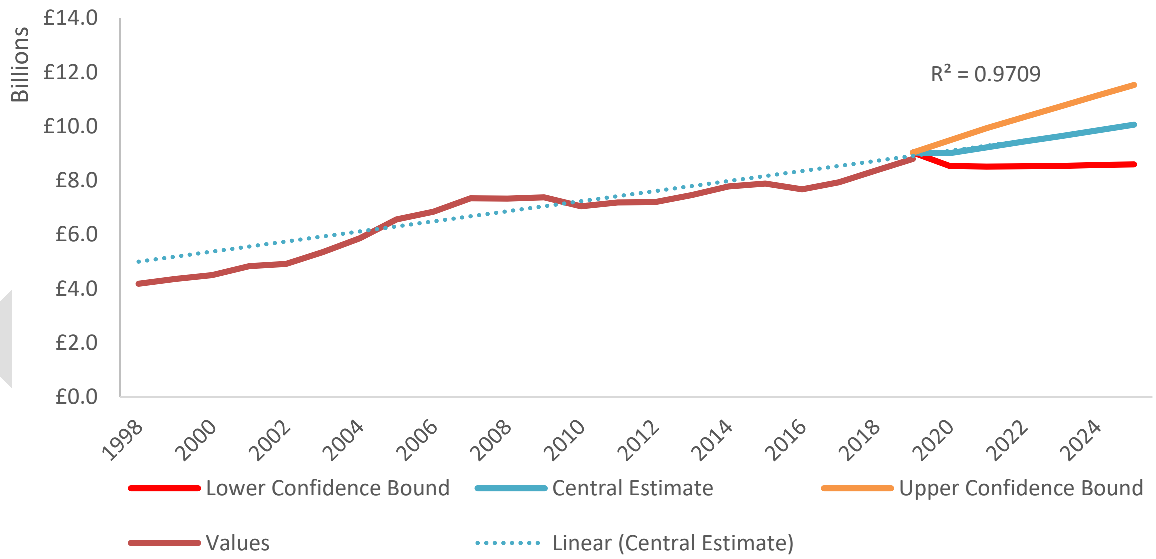


Figure 18: Pre-pandemic GVA projection

Table 6: Pre-Pandemic Projected GVA (City Centre)

	2020	2021
Lower Bound	£8,529.0m	£8,508.9m
Central Estimate	£9,005.9m	£9,216.8m
Upper Bound	£9,482.8m	£9,924.7m

[31] Except of motor vehicles and motorcycles
[32] Intermediate Zones (Scotland) - Gross Value Added

4.4.4 The results show that the City Centre GVA was estimated to grow annually by 2.4% in 2020 and 2.7% in 2021.

Estimated GVA 2020 & 2021

4.4.5 To estimate the GVA for 2020 and 2021, the weighted national GVA sector indexes (Table 5) were applied to the GVA of the City Centre in 2019. The results are presented in the table below. Critically, the 2020 and 2021 estimates are based on the contribution of the City Centre economy to the City of Glasgow economy in 2019.

Table 7: Estimated 2020 and 2021 GVA

	2020	2021
Estimated City Centre GVA	£7,905.5m	£8,273.8m
% Change on 2019	-10%	-6%

Estimated Impact

4.4.6 The estimated GVA for 2020 and 2021 (Table 7) has been deducted from the pre-pandemic GVA trend (Table 6). The results are presented in the table below.

Table 8: Estimated Impact on City Centre Economy

	2020	2021	Total
Lower Bound	-£623.5m	-£235.1m	**-£858.5m**
Central Estimate	-£1,100.4m	-£943.0m	**-£2,043.4m**
Upper Bound	-£1,577.3m	-£1,650.9m	**-£3,228.2m**

4.4.7 The results show that the pandemic has caused an estimated loss of £2.043 billion in GVA over the past two years on a Central Estimate. This is equivalent to a reduction of 12% in GVA in 2020 and 10% in 2021.

Table 9: Estimated Impact on the City Centre Economy (Central Estimate)

Study Area	2019	2020	2021
Pre-Pandemic Estimate	£8,795.5m	£9,005.9m	£9,216.8m
Estimated City Centre GVA	£8,795.5m	£7,905.5m	£8,273.8m
		-£1,100.4m	-£943.0m
		-12%	-10%

4.5 Key Sector Analysis

4.5.1 As noted in the introduction, this section of the report analyses the impact that the pandemic has had on the following key sectors of Glasgow's economy:

- **Professional and Public Services:** representing 61.1% of employment in the Study Area in 2019, rising to an estimated 61.8% in 2022, this key sector represents the Glasgow's 'office-based' workforce that is critical to the City's economic recovery.
- **Hospitality:** representing 9.0% of employment in the Study Area in 2019, the hospitality sector in Glasgow took a significant hit during the pandemic. Employment in the study area is now estimated at 8.1% in 2022. Glasgow's hospitality sector was recognised as

one of the UK's fastest growing, evidenced by the surge in demand for hotel rooms in the highly sociable City. Glasgow's hospitality sector is also core to City's marketing campaign of 'People Make Glasgow'.

- **Retail:** representing 7.0% of employment in the Study Area in 2019, falling to an estimated 6.4% in 2020, Glasgow's retail sector prior to the pandemic was outperforming that of Edinburgh's. Incidentally, this was in part driven by the City's previous campaign 'Glasgow: Scotland with style'.

4.5.2 In total, these key sectors represented 77.1% of the Study Area's employment in 2019. Over the course of the pandemic, this representation has only fallen by 0.8%, indicating their significance to the City's economic recovery.

Professional and Public Services

4.5.3 At the beginning of 2019, Glasgow had a strong pipeline of commercial property development, indicating the strength of professional and public services in the City[33]. As the year progressed, Glasgow was ranked 6th out of 63 in Management Today's top towns and cities to do business in the UK (June 2019).

4.5.4 Key factors such as Edinburgh's constrained development pipeline, inward investment from the City Region Deal, and cheaper rents in Glasgow compared to other major UK cities had all aligned to encourage investment by organisations such as Barclays, Clydesdale Bank, Morgan Stanley and more to house key operations in the city.

4.5.5 These organisations were also attracted by a large workforce and good graduate retention. Glasgow's talent supply and its ability to retain talent (e.g., its 'stickiness') played a critical part in the City's success prior to the pandemic. In turn, this acted as a significant influence in inward investment to the City.

4.5.6 Knight Frank analysed Glasgow's office market in 2019 and highlighted the take up rate per square foot was 37% above the 10-year average, showing substantially strong demand, with 1.2 million square feet under construction, showing significant planned supply to meet and sustain this growth[34]. However, as expected, the pandemic significantly impacted office take-up rates as work from home orders made it pointless to invest in new office space. This was coupled with general market uncertainty (demand) and halted construction (supply).

Education

4.5.7 The economic benefits brought to Glasgow because of its strong higher education sector is a facet of the city's sectoral composition that is perhaps underrated. It is difficult to isolate student spend in the city or even quantify the drop in student numbers within the city as most institutions do not swipe students in and out. However, certain inferences can be made surrounding the fall in numbers and associated impact on the Study Area.

4.5.8 Between the Study Areas higher education institutions: University of Strathclyde, Glasgow Caledonian University, the City of Glasgow College, and the Glasgow School of Art, around 100,000 students and staff are driven into the city centre each day[35]. During the pandemic, the Scottish Government Guidance of Higher and Further Education limited the total numbers of individual campuses to 5% of that institution's population – or just 5,000 of the total estimated footfall of students and staff. It is likely that this was limited to just core University and College staff.

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[33] Savills Spotlight Scottish Office Market. Available at: Savills UK | Spotlight: Scottish Office Market – December 2018

[34] Glasgow Office Market Research, 2019 Review. Available at: uk-cities-glasgow-2019-6960.pdf (knightfrank.com)

[35] Where do HE students' study? | HESA

4.5.9 Between the sharp decline in student and staff footfall due to campuses being closed, the impacts felt by cafes, restaurants, transport, nightlife, and retail cannot be understated.

Research & Development Investment

4.5.10 As part of Technology Innovation Centre (TIC) Zone and Glasgow City Innovation District (GCID), the University of Strathclyde (in the Study Area) has been instrumental in attracting investment to create the largest concentrations of industry-led innovation organisations in the UK. Four UK Catapults (one a UK HQ), a further four Scottish Innovation Centres plus Scotland's 5G Centre and the UK's only Fraunhofer Institute have all been attracted to TIC, testament to the industrial connectedness of the University and its ability to engage industry to invest in the City.

4.5.11 Figure 20 below shows the percentage share of expenditure on R&D performed within businesses in Glasgow, Edinburgh, and West Lothian, the three highest contributors to R&D expenditure in Scotland.

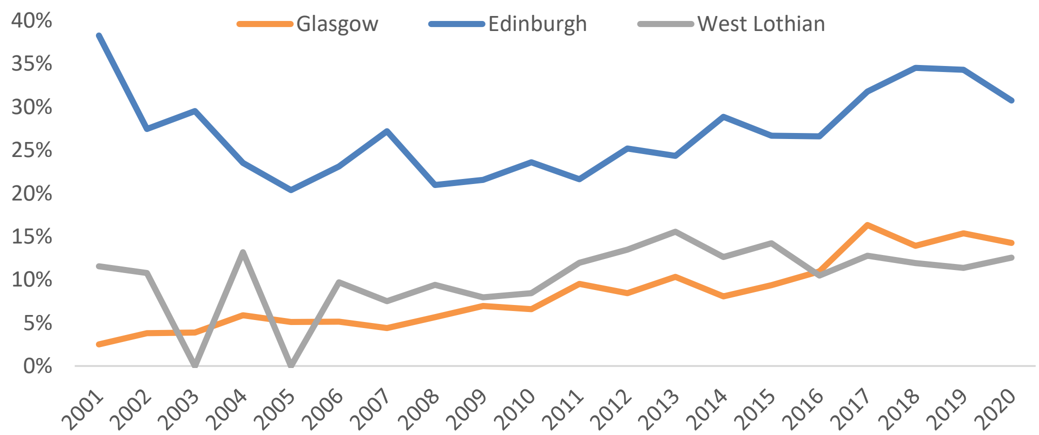


Figure 19: R&D Expenditure by Local Authority

4.5.12 Business Enterprise Research and Development (BERD) expenditure in Scotland was £1.437 billion in 2020, down 6.1% (-£94 million) in real terms from 2019. Over the longer term, BERD expenditure in Scotland has increased by 99.5% in real terms since 2007.[36]

4.5.13 Between 2010 and 2019, BRED expenditure in Glasgow increased by 6 percentage points. However, as the pandemic struck, BRED expenditure fell by 1.1% (or £15.6 million) to £204.7 million. In comparison, Edinburgh's fell by 3.5% (or £50.2 million). Glasgow's expenditure is likely to have been protected by significant investment in COVID-19 research at the University of Glasgow. While not in the Study Area, this is likely to have supported employment locally, including within the Study Area.

4.5.14 Recognising the City's contribution to R&D in Scotland, the Raising Partners Live conference will be taking place in Glasgow on 10th May 2022 – a major tech conference that has been

[36] Business Enterprise Research and Development (BERD) expenditure in Scotland. Available at: https://www.gov.scot/binaries/content/documents/govscot/publications/statistics/2021/12/business-enterprise-research-and-development-2020/documents/business-enterprise-research-and-development-2020-report/business-enterprise-research-and-development-2020-report/govscot%3Adocument/BERD%2B2020%2Bpublication.pdf

labelled a 'game-changer' or the industry by Mark Logan, former executive of Skyscanner.[37] The conference will be held in Glasgow's renowned TIC building.

4.5.15 Furthermore, the UK governments Levelling Up white paper set out a new Silicon Valley-style 'Innovation Accelerator' for Glasgow to 'create quality new jobs and boost the regional economy'. The proposed Glasgow research facility will come to the city centre, focusing on R&D in the Fourth Industrial Revolution.

4.5.16 The white paper also indicates that the Cabinet Office is establishing its second headquarters in Glasgow, with over 500 roles expected to be based there by the end of 2024.[38]

Employment Impact

4.5.17 Table 10 below shows that a significant pre-pandemic growth in professional and public services employment within the City Centre, likely driven by significant investments noted above.[39] However, as the pandemic took hold throughout 2020, the number of those employed in the sector dropped by 3.8%. The decline in employment of this sector is one of the biggest drivers behind the significant GVA decline of *Professional, scientific, and technical activities (M*) (Table 5) used to estimate the economic impact.

Table 10: Professional & Public Services Employment

	2016	2017	2018	2019	2020
Professional & Public Services	82,850	84,300	89,950	93,550	89,950
% Change YoY		**1.8%**	**6.7%**	**4.0%**	**-3.8%**

4.5.18 While sectoral employment figures for 2021 are not available at the City Centre level, application of the national and Local Authority changes to the 2020 figures, yield the results presented in Table 11 below.

Table 11: Professional & Public Services % Change in Employment

	2019 - 2020	2019- 2021
Professional & Public Services	-3.8%	1.0%

4.5.19 The figures indicate that there is likely to have been a return to pre-pandemic levels of employment in the sector. While this is positive, its well below the levels of growth that the City Centre had seen in previous years. It may be the case that as companies respond to new, hybrid ways of working, this growth has and will continue to be displaced to other areas of Scotland, the UK or even internationally.

4.5.20 Engagement with key stakeholders intimated that going forward, Glasgow's institutional pipeline is vital to grow and sustain interest and inward investment in the City. Additionally, it is important for policy makers and inward investors alike to remember that Glasgow is the only city in the UK with two top 50 higher education institutions.

[37] Forthcoming major tech conference in Glasgow will be 'game-changer' for industry, Scotsman. Available at: https://www.scotsman.com/business/forthcoming-major-tech-conference-in-glasgow-will-be-game-changer-for-industry-3608783

[38] Levelling Up White Paper. Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1052708/Levelling_up_the_UK_white_paper.pdf

[39] Apart from Barclays, which is scheduled to open in 2022.

Hospitality

4.5.21 In 2019, the City of Glasgow's hotel sector growth was eight times larger than the UK average, faster than any other city in the UK at the time. In the same year, occupancy rates in Edinburgh fell 2.1%, potentially reflecting the cities strong commercial growth, related office occupation and events sector. The latter of which, large scale events, concerts, conferences, and festivals, created significant demand for short term accommodation in Glasgow. From July 2018-2019, eight new hotels were brought to market in the city, offering over 1,000 new rooms.[40]

4.5.22 The quality of Glasgow's offer was also growing, with new openings in the City Centre such as Motel One, Ibis Style and Marriot's Moxy Hotel, all increasing available rooms. Coupled with complimentary developments such as the exhibition centre and the financial district, this sector was heading in a positive direction.[41]

4.5.23 **Error! Reference source not found.** below shows the depressed occupancy rate since February 2020 combined with a weak revenue per available room (RevPar). One prominent Glasgow hotelier noted a drop in occupancy to just 28%.[42]

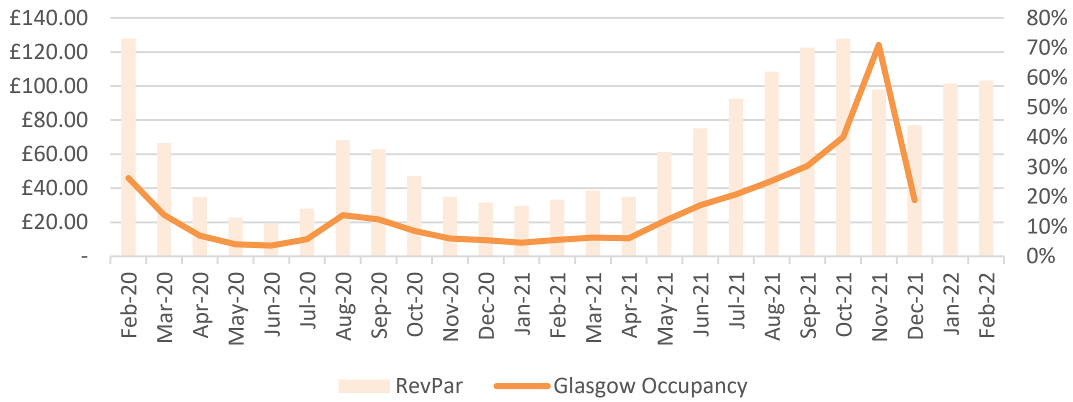


Figure 20: Glasgow Hotels – Average Occupancy and Revenue Per Available Room

4.5.24 As shown previously (see **Error! Reference source not found.**), the City of Glasgow was outperforming the rest of the UK in terms of accommodation. However, as the pandemic spread **Error! Reference source not found.** shows the significant impact which it took to its revenue per available room.

4.5.25 An assessment of the employment trends for the wider hospitality sector in the City Centre mirrors the City's performance in the accommodation sub-sector prior to the pandemic. However, the marked growth in employment throughout the preceding years was all but wiped out over 2019 and 2020.

Table 12: Hospitality Employment

	2016	2017	2018	2019	2020
Hospitality	13,000	13,250	14,000	13,750	11,750
% Change YoY		**1.9%**	**5.7%**	**-1.8%**	**-14.5%**

[40] Scotland Hospitality Industry: An update on key market performance part 2 | STR

[41] PwC Hotels Report shows strong growth in Glasgow as Edinburgh declines

[42] Confidential data gathered during the consultation phase of the study.

4.5.26 Following the same approach taken for the Professional and Public Services sector, application of the national and Local Authority changes to the 2020 figures, yield the results presented in Table 13 below.

Table 13: Hospitality % Change in Employment

	2019 - 2020	2019- 2021
Hospitality	-14.5%	-10.3%

4.5.27 The figures indicate that the sector is far from recovering to the levels of employment that it supported prior to the pandemic. As the City Centre opens again and business travel resumes, albeit possible more limited than what it was previously, it is likely that the post-pandemic employment trend will continue to grow.

4.5.28 Stakeholder engagement with the hospitality sub-sector indicated that short-term accommodation provision in Glasgow was reaching a saturation point before the pandemic, linked to the number of hotels being delivered. As Glasgow emerges from the pandemic, the growing hotel supply is likely to have a negative impact on the sector. An over-supply is likely to prolong pressures on price and associated RevPar.

Retail

4.5.29 The retail property market was already challenging pre-COVID-19. An increasing volume of activity was shifting to online shopping, towards 30% of consumer retail expenditure in 2021.[43]

4.5.30 Consultation with key stakeholders indicated that the reputation of Glasgow as a top shopping district was becoming increasingly unsubstantiated. Stakeholders linked the decline in the City's retail to a related decline in brands, with Edinburgh's improved offering such as St. James' proving more attractive. This was evidenced by a high instance of displacement Glasgow i.e., if a new shop opened, another closed.

4.5.31 Figure 22 below shows the impact of successive lockdowns on key stress across the City Centre. This is supplemented by a street-by-street analysis of footfall in the Study Area, found at Appendix E .

[43] Available at: https://www.apnnews.com/uk-registers-highest-e-commerce-spending-at-30-in-2021/

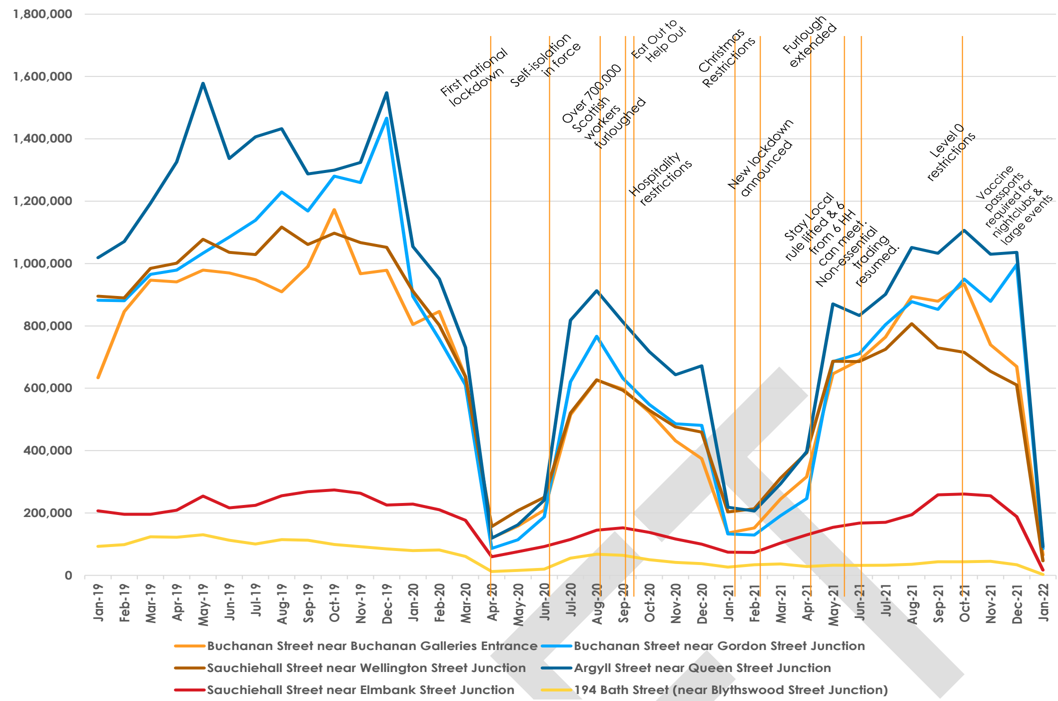


Figure 21: Glasgow City Centre Footfall – Trend Analysis

4.5.32 Comparing the October 2019 peak with the peak seen at Level 0 restrictions in October 2021, shows that footfall remains on average around 23% lower. The significant lack of City Centre footfall, which was increasingly reliant on office workers and students, has had an extremely damaging impact on the revenue of core retailers. It should be noted that this is likely to have led to a rise in convenience retail, driven in part by its proximity to housing and many people still working from home.

4.5.33 While e-commerce has some benefits for the industrial property market in the form of logistics and supports some destination stores for click-and-collect. As the City Centre targets residential growth, it might be the case that this sector of the market provides some level of benefit through last-mile logistics, such as fulfilment centres see in Townhead and the north of the City.

Employment Trend

4.5.34 The combined effects of the trends shown above have resulted in a significant impact shown in the table below. While the number of those employed in the sector in the City Centre was declining, it was doing so a reducing rate of decline. Then, as the pandemic hit in 2020 there was a significant loss of c.1,500 employees, equivalent to a 14% drop on the previous year.

Table 14: Retail Employment Trend

	2016	2017	2018	2019	2020
Retail	12,250	11,000	10,750	10,750	9,250
% Change YoY		**-10.2%**	**-2.3%**	**0.0%**	**-14.0%**

4.5.35 Again, application of the national and Local Authority changes to the 2020 sector employment figures, yield the results presented in the table below.

Table 15: Retail % Change in Employment

	2019 - 2020	2019- 2021
Retail	-14.0%	-9.7%

4.5.36 The analysis shows that the sector is likely to have recovered some of the lost employment (c. 400-500 employees). While e-commerce has and will continue to have a negative impact on the footfall and related spend that brick-&-mortar retail receives, some consumers still prefer a physical retail experience. This is likely to help sustain larger and more diverse retailers in the City Centre's core streets (e.g., Buchannan Street or the 'Golden Z').

5 Measures to Boost Economic Recovery

5.1 Introduction

5.1.1 This section of the report outlines potential measures to boost economic recovery.

5.2 Potential Measures

Commuting

5.2.1 Multiple lockdowns and orders to 'stay at home' has changed the way those now used to remote working view the office/home balance. Commuting less has enabled people to take greater control over their time and spend less on travel. The core issues to be resolved in attracting more people back to the City Centre include commuting time, cost, and quality.

5.2.2 In Glasgow, spending an hour on public transport only increases job access by one third, but almost quadruples job access in London.[44] Therefore, to reignite the City's economy it must be worth a workers time to commute.

Time

5.2.3 To resolve the issue of time, the Glasgow Economic Recovery Group and the Glasgow City Centre Taskforce may consider promotion of flexible working hours across the working day or shoulder hours. Flexible working around core hours may allow employees to better absorb their commute into the working day. While many may have discovered benefits from home working, others may have also found it more difficult to 'switch off'. Therefore, flexible working policies which stress the benefits of working from the place of employment while recognising the benefits of remote working may encourage a swifter and more sustained return to the City Centre. This might be combined with measures to promote commuting outside peak periods and other measures which may also act to increase the City Centre spending population above current levels.

Cost

5.2.4 Subsidising or removing the cost of commuting may help to attract more people back into the City Centre, in turn driving critical daytime footfall for both retail and food services.

5.2.5 While Scotland has recently introduced free bus travel for those under 22, this has not yet been extended to rail travel.

5.2.6 A recent study found it would cost just over an additional £110 million annually to make Glasgow's buses free for everyone were current profit levels to be maintained (and under £82 million were no profit made).[45] Given the City Centre was projected to drive £9.2 billion in GVA in 2021 prior to the pandemic, investment in this or similar measures may generate positive economic returns to the City.[46] It is likely that such measures would need to be considered for major urban centres across Scotland

5.2.7 Recognising the complexities involved in implementing such as scheme, other measures could include increased flexibility for public transport payments. In line with increased flexibility

[44] UK Levelling Up White Paper. Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1052708/Levelling_up_the_UK_white_paper.pdf

[45] Technical Note by Jeff Turner, Independent Transport Consultant (2020). Available at: https://www.getglasgowmoving.org/reports/freebuses.pdf

[46] To clarify, this does not include rail.

of working hours, payment methods for public transport should mirror that of larger cities, such as the use of 'tap-on-tap-off' (i.e., Oyster Card in London) or through regular credit and debit cards across all services entering the City.

5.2.8 Engagement with Transport Scotland, Strathclyde Partnership for Transport (SPT) and Scottish Government would be critical to understanding the feasibility (funding and operation) of the scheme.

Quality

5.2.9 Accelerated investment in the quality of public transport will be critical to attracting workers back into the City Centre. While the quality of public transport has been improving in Scotland, particularly on arterial routes into and out of the City, more can be done. Some rail services, particularly those heading to southern, eastern and western suburbs lack wi-fi, comfortable setting, charging points and tables.[47] It is recognised that investment in some of these features are typically recovered for longer journeys. However, a large proportion of the City's workforce live in these suburbs and improving the attractiveness of their City Centre is likely to be critical in generating additional footfall.

5.2.10 In this instance, quality has a direct relationship with quantity. Increasing service numbers and frequency will support more flexible working patterns. On longer journeys to the City, a higher number of services and carriages will provide more seats, helping to improve journey quality.

5.2.11 An additional benefit of improving public transport is a potential reduction in private vehicles entering the City, driving a related reduction in greenhouse gas emissions.

Hospitality

5.2.12 As shown in 4.5.25, the effects of the pandemic on the City Centre's hospitality industry have been significant. Engagement reaffirmed that Glasgow's heavy reliance on business tourism and increasing supply of hotels has had a negative effect during the pandemic.

5.2.13 Additionally, while recognising it is critical, the City Centre's economic recovery should not be solely reliant on work-related footfall to support the hospitality sectors. While this is critical to the City's success, there should be a renewed focus on driving leisure, retail and experiential visits.

Promotion

5.2.14 To achieve this, the Glasgow Economic Recovery Group and the Glasgow City Centre Taskforce may consider a 'Welcome Back' campaign, emphasising culture, activity, and safety. During our consultations, various references were made to the 'Glasgow's Miles Better' campaign in the 1980's, promoting the City as a tourist and business location. It is regarded as one of the world's earliest and most successful attempts to rebrand a city and received several domestic and international awards.[48]

5.2.15 A coordinated campaign should also mirror the success of 'People Make Glasgow', bringing together multiple public and private sector partners to promote the City as a key destination in the UK.

[47] It is recognised that some of these

[48] Glasgow: Miles Better Campaign. Available at: https://en.wikipedia.org/wiki/Glasgow%27s_miles_better#cite_note-1

Eat-Out-To Help Out – Glasgow

5.2.16 Analysis presented at 2.5.17 shows the Eat Out To Help Out scheme was successful in Glasgow. Figure 22 also shows it may have contributed to a sharp rise in footfall across the City Centre.

5.2.17 In New South Wales, Australia, residents can apply for "Dine and Discover" vouchers worth up to $100 (c. £56) as the state government tries to help businesses recover from the pandemic. Residents can apply for up to $50 in dining vouchers to be spent at any cafe or restaurant and can also apply for up to $50 in "discover" vouchers to be spent on entertainment and recreation. The scheme has come at a cost of $500 million (c. £280 million).

5.2.18 A similar styled scheme in Glasgow may help drive post-pandemic economic recovery. Critical to its success will be the digitisation of the service. This will help to improve the accessibility, accuracy and monitoring of the scheme.

Partnership

5.2.19 Aligned with all of the measures proposed above, partnership between public and private sector organisations is critical to Glasgow's successful economic recovery.. The public sector must help to position, organise, support and align partners across Glasgow, enabling the planning and implementation of recovery measures. With significant sunk capital in the City Centre, and a vested interest in seeing the success of the City as a key destination for work and leisure, private sector organisations are essential to the success of recovery measures. Pulling multiple City Centre organisations together will also contribute to the level of resource (financial and labour) available to support the City's recovery.

Business Improvement District Feasibility

5.2.20 Business Improvement Districts (BIDs) took off in the United States in the late 1970s, although they were originally developed in Canada in the late sixties. While they are now found throughout the world, the legislation governing them in Scotland is unique.[49]

5.2.21 The challenge of establishing a BID in the City Centre will be raising awareness of the model's success in helping bring together local communities, businesses and the public sector to help drive economic growth and related local jobs. The scale of the City's economy and related number of businesses may make it difficult to implement. To formally establish the BID, over 50% of rated and individual businesses in the proposed BID area must vote in favour, on a minimum turnout of 25% for both categories. To resolve this, the Glasgow Economic Recovery Group and the Glasgow City Centre Taskforce may consider separate BIDs in each of the 9 City Centre Districts– or a combination thereof.

Significant Headwinds facing Businesses

- ***Jobs Vacancy**:* The ONS' Economic and activity and social change in the UK, real time indicators on 16 Dec 2021 reported the volume of online job adverts was 137% of its February 2020 average level, with the highest adverts in Transport, Logistics and Warehousing, up 325%.

- ***Wages pressure***: Businesses in the Accommodation and Food Service industry continues to report increasing wage pressure, with the ONS Business Insights and Conditions Survey reporting hourly wages to be higher for new and existing employees in

[49] Scotland's Town Partnership (STP). Available at: https://www.scotlandstowns.org/scotland_s_business_improvement_districts_promoting_economic_growth_and_community_engagement

the sector, at 24% and 15% respectively, in early February 2022. This compares with 19% and 15% respectively the month before.

- ***Inflation***: annual inflation was recorded at 5.4% in December 2021, the highest in 30 years, driven by food, clothes, household goods and accommodation costs. Further rises are anticipated in 2022, amid soaring energy prices and input costs.

- ***Cash Reserves, Survival Confidence and Debt Obligations:*** In February the Accommodation and Food Service industry again reported the highest percentage of businesses with low or no confidence in meeting current debt obligations.

- ***Consumer Confidence:*** The IGD ShopperVista Shopper Confidence Index plummeted to a new low of -17 in January 2022 amid concerns over higher living costs. 89% of shoppers expect food prices to rise in the next year and 39% are worried about their weakening financial situation. This will affect discretionary spending on eating out and non-essential items, in at least the first half of 2022.

- ***Working-from-home practice:*** According to the JLL November 2020 Survey, about 39% of respondents wanted to work from home 2-3 days a week. Businesses may feel limited in their capacity to adopt a pattern while the skills shortage is prevalent. Increased working from home will persist over the long term so measures to encourage an increased frequency of City Centre trips and improve average spend per trip should be encouraged to support business. Addressing the City Centre's relatively low population through encouraging a higher residential population will also provide support.

- ***Post-pandemic Retail Vacancy Rate***: Vacancy rates were reported to be 12% pre March 2020 and increased to approximately 15.5% post June 2021, consistent with the 3.5% decline noted for 'strong' city centres. (Centre for Cities research)

Appendix A Policy Context

A.1.1 To supplement the narrative of Glasgow's situation before and after COVID-19, it is helpful to analyse the various policies in place as these tend to reveal the priorities of decision-makers and highlight the what the most pressing issues are at that time.

A.1.2 The key policy driver pre-pandemic was the City Centre Strategy 2014-2019. The emphasis at this time was on enhancing the city's leisure offering, the shopping experience, culture, and entertainment. This was seen as the answer to increasing footfall and the overall attractiveness of the city, and to some degree still is a key post-pandemic response. For example, the key objectives emphasised were points like being the top UK retail centre out with London's West End, be an accessible place that offers something for everyone in terms of culture and recreation and be a top European City for doing business.

A.1.3 Within this strategy there were various sub-programmes that managed specific interventions to address key objectives, for example, District Regeneration Frameworks (arguably the key set of interventions), and various other projects like the Lane Strategy, Commercial Bin Project, Sauchiehall Avenue Project, night-time economy commission and more.

A.1.4 Although most of the priorities remain the same for the city, COVID-19 has shifted the goal posts slightly and policy context has had to respond appropriately to this. For example, the domination of office space in the city centre coupled with the increase in homeworking has put emphasis on having a more dynamic and varied use of space, as the footfall and activity of office workers can no longer be relied upon. Furthermore, the lack of residential space in the city centre is now a focus, as people commuting into the city is not significant enough. Another thing not emphasised as heavily in 2014 but is now front and centre as a policy priority is the climate crisis, and how Glasgow City Centre can mitigate its emissions and overall contribution to global warming.

A.1.5 The overall shift in the policy context can be summarised by a strong emphasis on leisure and tourism development moving to residential development, and increased population density and retention.

A.1.6 Some of the key policies guiding the city's momentum are summarised below:

Policy	Case
Scotland's National Strategy for Economic Transformation 2022 to 2032	*Summary to be added*
Glasgow City Centre Recovery Plan 2022-24	A structured plan to support the recovery of Glasgow city centre over 2 years while a strategy for 2025 is developed. The four main priorities of the plan are: ▪ Maximise activity & footfall ▪ Maximise employment and business development opportunity ▪ Attract people to live, work, invest, visit, and learn ▪ Mitigate climate impacts
District Regeneration Frameworks	The DRF's for the 9 districts of Glasgow outline short, medium, and long-term interventions to bring economic, social, and environmental improvements to the city centre. The key themes are: ▪ Address the shortage of green space and domination of cars and busses

Policy	Case
	▪ Enhance public transport and active travel developing a connected and walkable city ▪ Address lack of local amenities to attract residents achieve higher population density ▪ Protect the architectural heritage of the city ▪ Attract investment and foster innovation
City Centre Living Strategy	This strategy seeks to address key issues in Glasgow's housing market and rate of residential development, for example high instance of listed buildings, lack of availability, unmet demand, and negative perceptions. Key objectives are: ▪ Increase the city centre's population from just over 20,000 to 40,000 by 2035. ▪ Find productive outcomes for vacant commercial space, with a particular focus on upper floors. ▪ Provide a quality city centre environment that is cleaner, greener, more sustainable, and better connected. ▪ Deliver quality in design across all development. ▪ Offer a responsive, innovative approach to investment opportunities that support this strategy; and ▪ Enable resilient, empowered and socially cohesive neighbourhoods.
The Glasgow Transport Strategy 2030	A policy and spatial delivery framework to help guide decision-making on transport. The 4 main objectives are: ▪ Successful transition to a net-zero-carbon, clean, and sustainable city ▪ Tackle poverty, improve health and reduce inequalities ▪ Contribute toward continued and inclusive economic success and a dynamic, world class city ▪ Contribute to the creation of liveable neighbourhoods and an inclusive city centre
High Street Area Strategy 2019-2023	▪ Promote the local built environment, medieval history, and range of historical asset. ▪ Celebrate the unique local offer. ▪ Enhance the look and feel of the area. ▪ Improve physical connections to and throughout the area. ▪ Overcome barriers to sustainable growth for SMEs. ▪ Increase footfall to and throughout the area.

Appendix B Leeds

B.1 Overview

This is one of three case studies examining the impact of COVID-19 city centre activity across the UK, and how each of those cities, Manchester, Leeds and Edinburgh are recovering in comparison to Glasgow. The case studies provide insights into what makes one city centre more resilient than another, and the responses of Government and Local Authorities thus far to power city centre recovery post-pandemic amid COVID-19 accelerated trends in remote working, digital transformation, and online shopping.

B.2 Pre-Pandemic Performance

Leeds has one of the most diverse economies in the UK, with several sectors contributing similar proportions to the City's GVA in 2019. Like Glasgow, the City's sector composition is broadly based on highly skilled sectors which account for 44% its GVA (Glasgow = 52%).

In the five years leading to the pandemic, Leeds's GVA was growing at 3.9%p.a., surpassing that of Glasgow at 2.9% and above that of the UK at 3.5% (and well above Scotland's of 2.6%). In 2019, the City's GVA per capita was £34,510, significantly above the UK's per capita average of £29,579. This was a result of its strong employment growth in high-productivity sectors, and the growth of digital related employment by 67% since 2015.

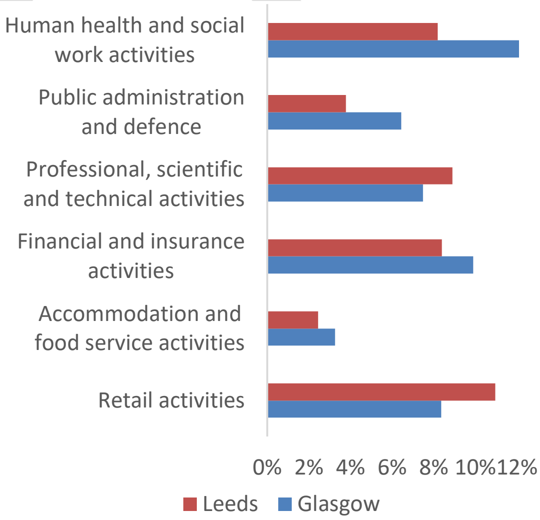


Figure 22: 2019 Sector GVA

The City centre has been going through a major transformation in the past decade thanks to many substantial and hugely successful retail and leisure schemes including Trinity Leeds, Victoria Leeds. This is likely to be behind the larger contribution of retail GVA in comparison to Glasgow. However, it is also likely to have exposed the City to greater economic impact than Glasgow, which has higher weightings in less negatively affected sectors e.g., Human Health and Social Work Activities.

Leeds is also the economic centre of Yorkshire and has one of the busiest transport hubs in the north of England. The City is very well connected to major cities in the UK by a network of motorways and one of the busiest railway stations in the north of England. However, the City's performance was and still is undermined by poor city-suburb connectivity and challenges related to its networks of legacy highways and railways which amplified its lack of green space.[50]

Its excellent connectivity is likely to be the stimulus behind the City's 27 million leisure tourist visits in 2016m generating over £1.6bn for the City.[51] The following year it was ranked fifth on Lonely Planet's Best In Europe 2017 list.[52]

In 2018, Leeds City Council estimated that the population of the City would grow to 819,000 by 2024 (80% above 2019 levels). Despite this, residential integration in the city centre has lagged behind

[50] Future of Leeds City Centre and Local Centres report - July 2021

[51] STEAM Report for Leeds

[52] Available at: https://www.theguardian.com/uk-news/2017/may/23/leeds-ranked-fifth-on-lonely-planets-best-in-europe-2017-list

other major UK cities partly due to poor-quality developments in the 80s and 90s which impacted value for many home buyers and investors.

Pandemic Impact

The City's excellent connectivity to the rest of the UK was perhaps to its detriment throughout the pandemic. Out of Glasgow (-1%), Manchester (-1%) and Edinburgh (+8%), Leeds recorded the largest drop in spend from visitors entering from outside of the City (-8%), despite having the same recorded fall in visitor numbers as Manchester (-7%). This suggests that the City had a heavy reliance on tourism, potentially driven by its large retail sector.

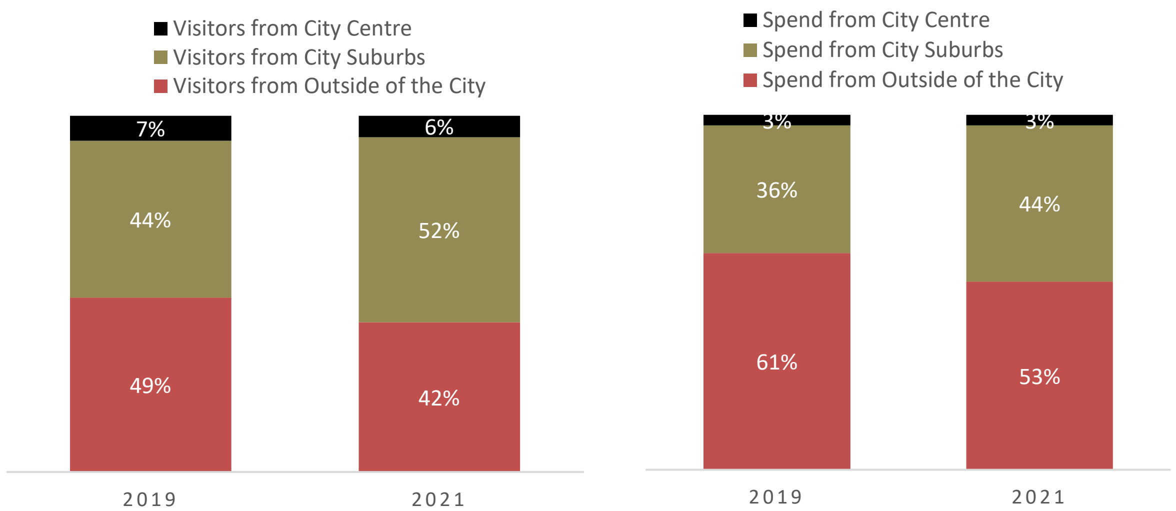


Figure 23: Leeds Visitor and Spend Comparison

While weekday footfall showed recovery weakness due to hybrid working, weekend footfall levels recovered much more strongly, potentially linked again to the City's heavy retail reliance. Weekend footfall returned to its pre-pandemic levels in August 2021, similarly to spend trend, suggesting that the city centre has a thriving social scene and remains a place where people like to meet and shop.

Sales & Footfall

On average, businesses in City Centre lost 39 weeks of sales during the pandemic compared to the UK's average of 35 weeks of lost sales, again highlighting its reliance on the retail sector. Its footfall slightly underperformed when compared to that of Manchester, Edinburgh, and Glasgow. Overall footfall dipped to as low as 8% of pre-pandemic levels by April 2020, then stayed below 55% during the lockdown periods. It eventually reached a peak of 96% in late November 2021, the Christmas shopping period.

B.3 Post-Pandemic Economic Recovery

As Leeds emerges from the pandemic, data from CGA and Wireless Social shows that sales in Leeds remain just 0.2% below that of pre-pandemic levels as of January 2022. This has earned the City the title of most 'vibrant city' out of Manchester, Edinburgh, Glasgow, and others including Birmingham and London, with the latter showing sales 19.0% below pre-pandemic levels.[53]

A high-level economic model by the Future of Leeds City Centre examined three scenarios of different working-from-home assumptions using a baseline of pre-pandemic growth looking out to 2030.[54] This

[53] Based on a combination of sales data from CGA and device log-ins from Wireless Social that reveal the hospitality visits made by consumers. Available at: https://cgastrategy.com/vibrancy-of-britains-10-biggest-cities/

[54] Local Centres Report. Available at: https://democracy.leeds.gov.uk/documents/s225511/Local%20Centres%20Report%20Appendix%202%20V2%20130921.pdf

included a 'bounce-back-to-new-normal' scenario, 'wide-spread-working-from-home' scenario, and 'significant-headwinds' scenario.

All scenarios illustrated that increased homeworking presents challenges for the city, with the 'bounce-back-to-new-normal' – office workers in 3 days a week – driving a significant return to pre-pandemic levels of economic growth. This is simply down to the correlation between increased weekday footfall and related additional spend to support other (non-office based) sectors. On the other hand, 'wide-spread-working-from-home' – office workers in just 2 days a week – would mean that City spend is displaced to local centres in West Yorkshire (i.e., people spend money in their local areas rather than in the City). As shown in the main report, this is likely to be the case in Glasgow.

In terms of the City Council's policy response, the Leeds Economic Recovery Framework was published in October 2020 – relatively quickly in retrospect, given the stage at which the pandemic was at. It is centred around the need to:

- **Respond:** Where required, continue to take immediate actions to support businesses and the economy.

- **Reset and Renew**: Ensure the Council understands the challenges and opportunities that Leeds faces in recovery and that they have a clear focus and direction on the projects and partnerships that will address them.

- **Build Resilience:** Maintain a long-term view of the City's aspirations to deliver Inclusive Growth, address the Climate Emergency and be the best city for Health and Wellbeing.

Appendix C Edinburgh

C.1 Overview

This is one of three case studies examining the impact of COVID-19 city centre activity across the UK, and how each of those cities, Manchester, Leeds and Edinburgh are recovering in comparison to Glasgow. The case studies provide insights into what makes one city centre more resilient than another, and the responses of Government and Local Authorities thus far to power city centre recovery post-pandemic amid COVID-19 accelerated trends in remote working, digital transformation, and online shopping.

C.2 Pre-Pandemic Performance

Edinburgh is one of the UK's fastest growing cities. In 2019, its gross value added (GVA) per capita was £46,024 compared to the Scottish average of £26,967. Pre-pandemic, Edinburgh's GVA had grown at an average of 4.7% since 2015, surpassing that of the UK and Scotland at 3.5% and 2.6% respectively. This had cemented the City's place as the top contributor to the Scottish economy.[55]

The years preceding the pandemic had seen the city establish itself as the leading financial, insurance and related fin-tech City in the UK (outside London), contributing 23% to City's economy. As an important education hub with several colleges, universities and other higher educational institutions, businesses in the city had easy access to a highly skilled workforce, with 57% of its GVA being driven by highly skilled sectors.[56]

Additionally attracted by excellent connectivity, and thriving cultural and social scene, Edinburgh, not dissimilarly to that of Manchester, Glasgow and Leeds, experienced strong employment growth. Students and private sector job growth was the key drivers of this, with the City's job growth rate in excess of 12% 5 years prior to the pandemic starting.[57] In turn, Edinburgh exhibited a significant and increasing demand for residential and commercial properties.

With nationally significant events such as the Edinburgh Tattoo and Festival, centred around Edinburgh Castle as their centre piece, the capital has excelled as one of the UK's leading cultural and entertainment centres. This characteristic has limited the impact on its economy throughout the pandemic thanks to a drive in 'staycations' and allowed it to recover much quicker than that of its main competitor, Glasgow.

Despite the backdrop of high-profile closures including Debenhams and Topshop, and the increasing popularity of internet shopping in recent years, Edinburgh reported a relatively low retail vacancy rate of 10% prior to the pandemic.

Vitality Index

In January 2019 Edinburgh was named the best city in the UK for economic growth prospects using the Vitality Index - a measure of education, entrepreneurialism, affluence, productivity, growth, and environmental factors.

Edinburgh was the only large city in the Top 10 by the index in 2022, evidencing its strong recovery.

[55] Edinburgh contributed 16% to Scotland's total GVA, whilst Glasgow contributed 15% in 2019.

[56] ONS, Avison Young

[57] JLL Reference

C.3 Pandemic Impact

Lockdowns vs. Sales

Businesses in Edinburgh's city centre lost 43 weeks of sales compared to 35 weeks of lost sales on average of the 62 city centres across the UK since the onset of the pandemic in March 2019.

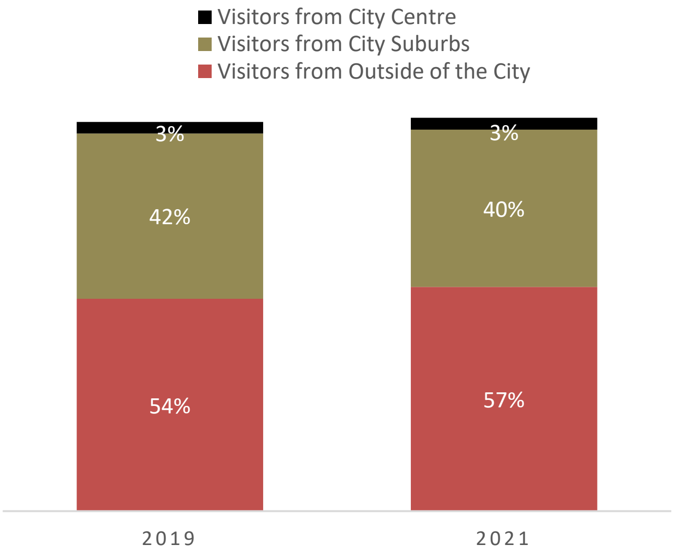
Scotland's high streets in general lost 8 weeks more of sales compared to England's and Wales'. This was due to a combination of lower sales during lockdown and a delay in coming out of it.[1]

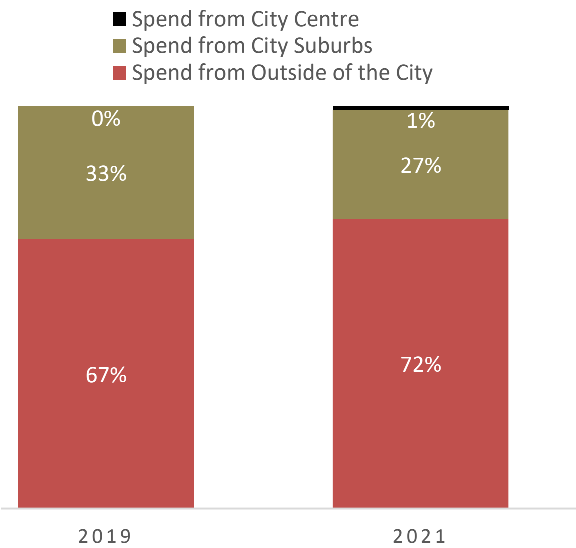
Early on, as the first lockdown was introduced, the City's footfall dropped to below 10% of pre-pandemic levels.[58] Economically strong centres such as Edinburgh were hard hit during the pandemic as they tend to have larger catchment areas (outside the city boundaries) and more non-essential services.

Weekday footfall levels using anonymised mobile phone data collected by Beauclaire shows lower than average footfall levels during both major lockdown periods, but an increase to above average in late June 2021 as lockdown was lifted.

By December 2021, footfall levels in the City were 120% of pre-pandemic levels and 90% that of December 2019, a substantially stronger recovery compared to the average UK high street, which in December 2021 recorded only 80% of December 2019 levels.

Edinburgh's position as a key leisure destination meant that it experienced sharp rises in footfall as staycations became increasingly popular in the UK. The figures below show that the City's visitor profile and related spending sources shifted considerably in favour of outside visitors. Out of Leeds, Manchester and Glasgow, it is the only city to record a rise in both visitors and related spend from outside of the City. Prior to the spread of the Omicron variant, the City was beginning to see a rapid recovery in August 2021, driven by events such The Fringe.





As of November 2021, the High Street Recovery Tracker data showed increased proportions of both visitors from outside of the city and their spending reflecting a strong recovery driven by up pent-up demand for UK holiday destinations.

In summary, Edinburgh had the highest footfall levels post-pandemic relative to Glasgow, Manchester, and Leeds, undoubtedly boosted by the August festivals. This highlights the fact that quality cultural &

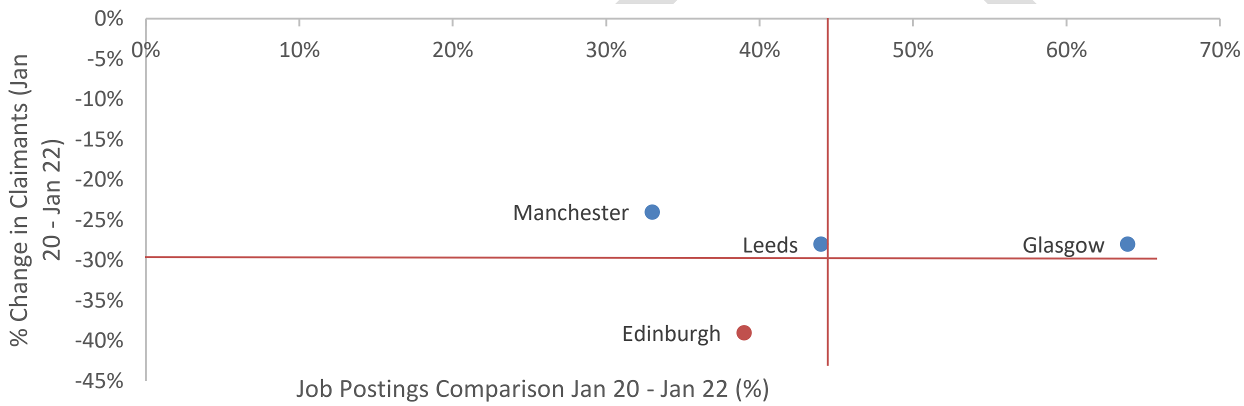
[58] Beauclaire Footfall data

leisure offerings have been critical to the recovery of footfall levels, related spend and economic growth.

C.4 Post-Pandemic Economic Recovery

In November 2021, Edinburgh was still in the top 5 centres, with the lowest vacancy rate of below 12%, this could be due to the city's historic centre, there aren't many spaces available for shops. For Edinburgh it seems that the pandemic hasn't changed the structure of its high street. That said, it may be too early to gauge the extent of the damage due to the Emergency Government support available to high street businesses (VAT reduction, Grants to cover other costs, property rate holiday, guaranteed borrowings etc).

The graph below shows the relationship between the change in benefits claimant count and job postings between January 2021 and January 2022. Edinburgh has had a significant decrease in the number of claimants, while the increase in job postings has remained below average. The low claimant count rates in suggests the City has been relatively protected from pandemic effects, perhaps because many workers have continued to work from home. Slow posting recoveries could signal a challenge for policy in the longer term, particularly if workers do not return to offices and postings in supporting services sectors do not bounce back fully.



As Edinburgh emerges from the pandemic, it is clear about cementing itself as a key leisure destination, with approved redevelopment of Debenhams on Princess Street as a four-star Marriott Tribute in 2021, the first of the brand in Scotland, there is a clear commitment and confidence from investors in the City as a popular UK destination.

- "The City of the Edinburgh Council has developed a City Centre Recovery Plan, with the two core priorities for the Council and its partners being to "support the city centre to adapt and thrive" and "build momentum for long term recovery". This sustainability focus will be achieved through a mixture of significant new builds, refurbishments and repurposed old sites. Some have hailed this as the most significant retail, commercial and tourism developments seen in any UK centre." Edinburgh city centre at the heart of the Capital's recovery plan in refreshed Economic Strategy – The City of Edinburgh Council

- In February 2022, the Scottish Retail Consortium reported a decline in January footfall to 16.2% compared to January 2019, and a decline in shop vacancy rate to 16.1% in the fourth quarter from 16.4% in the preceding 3 months. That said, Edinburgh still has a sales density of £665 per square foot before the opening of the high-profile St James Quarter last year, this is more than double Scottish's average density of £329 per sf.2 (Glasgow's sales density is 611 per sf.2).

- **Scottish Retail Conversion Wave:** In February 2022, plans to convert the former Jenners department store into a hotel with retail elements was announced in Edinburgh. Scottish other major retail destination - Glasgow - has similar plans with Land Securities' proposal to demolish the Buchanan Galleries to develop mixed-use neighbourhood (shops, home, hotel & hospitality outlets).

Appendix D Manchester

D.1 Overview

This is one of three case studies examining the impact of COVID-19 city centre activity across the UK, and how each of those cities, Manchester, Leeds and Edinburgh are recovering in comparison to Glasgow. The case studies provide insights into what makes one city centre more resilient than another, and the responses of Government and Local Authorities thus far to power city centre recovery post-pandemic amid COVID-19 accelerated trends in remote working, digital transformation, and online shopping.

D.2 Economic Performance: Pre-Pandemic

Manchester is the UK's fastest growing city in terms of both jobs and population. Its population almost doubled in the period 2002-2017, adding 20,000 residents, with students and young professionals being the main contributors.[59] The number of jobs in Manchester grew by some 85% from 1998 to 2017, with 70,000 jobs added in this period, mainly in knowledge-based services. In comparison, over the same period, Glasgow City Centre' s population increased by 75%, with jobs increasing by 15% - the highest job growth of all Scottish cities. In 2019, Manchester's GVA per capita was £62,000 compared to London's per capita average of £51,015, indicating the City's position as a key driver of economic growth in the north of England.

Manchester City Centre is classified as a strong centre by Centre for Cities, as it has a higher share of highly skilled exporting jobs than other cities in the UK. Pre-pandemic (2015-2019), Manchester's GVA was growing at an average of 6% per annum, significantly above that of London at 4.1% and the UK at 3.5%. The significant pace of growth can be linked to the City's declining commercial vacancy rate and corresponding strong employment growth in both public and private sectors, posting greater than 15% jobs growth over the same period.[60]

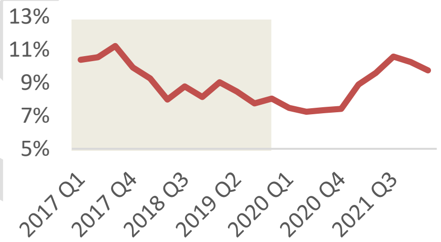


Figure 24: Manchester Vacancy Rate

D.3 Pandemic Economic Impact

Economically strong centres such as Manchester were hard-hit during the pandemic, as they tend to have larger catchment areas (outside the city boundaries), and more non-essential services. Unlike the other 3 cities, pre-pandemic[61], businesses in Manchester relied on people from the city suburbs for their income more than they did from tourists. This is evidenced by the City's estimated loss of 41 weeks of sales during the pandemic, compared to UK average of 35 weeks of lost sales.

Lockdown Christmas

Weekday footfall remained at 70% of pre-pandemic levels through-out the traditionally busy retail period before Christmas 2021. This is 60% of January 2019 footfall levels, relatively weak compared to the general UK retail footfall index which in December 2021 was 84% of 2019 levels.[1] Manchester's high-skills employment base means Working-From-Home is likely to be widely adopted and prolonged, explaining the persistence of lower Weekday footfall levels.

59 Census 2011, ONS

60 JLL report in Reference Folder

61 Pre-pandemic levels refer to February 2020 levels as the Centre for Cities only provided data for February 2020 as the index baseline. From our analysis of Glasgow City Centre's footfall, February footfall and spending levels are typically low. In other words, "recovery to pre-pandemic" could mean 20-30% below the levels of a 2019 representative month.

The Variant Effects

The latest data in early January 2022 shows a large drop in footfall of almost 40% compared to January 2019 levels, indicating that the Omicron outbreak in December had a dampening effect on the recovery momentum.

Weekday footfall levels dropped most severely for Manchester during the first lockdown, to as low as 10% of the pre-pandemic levels in April 2020. As the Eat Out to Help Out campaign was introduced in August 2020, footfall rose to 30% of the pre-pandemic levels, indicating the scale of the campaigns impact on the City. Subsequently, footfall stayed under 40% of pre-pandemic levels for the remainder of the lockdown periods causing a severe and prolonged impact on the City's businesses.

Contrary to expected trends, offline credit card spending recovered and outperformed City footfall. Spending levels returned to pre-pandemic levels by July 2021 and exceeded them by 50% in December 2021, prior to the Omicron onset.

Manchester in-store spending was less than the national average during the lockdowns but has outperformed it since August 2021. This suggests that people spent more when returning to the City. It may, however, reflect higher prices for goods and services due to supply shortages caused by the pandemic.

According to ONS January 2022 UK Retail data, after a strong November when sales volume increased by 7.2% compared to pre-pandemic levels, retail sales volume fell by 3.7% in December 2021. Despite being 2.6% higher than pre-pandemic levels, the onset of the wide-spread Omicron variant throughout December has clearly hampered Manchester's economic recovery,

The Retail, and Food and Drinks sectors were severely hit during the pandemic, with Food and Drinks sales down as low as 10% of the pre-pandemic levels during the first lockdown. Being non-essential businesses, these sectors experienced more weeks of lost sales due to longer time spent in lockdown.
However, sales recovered to the pre-pandemic levels as lockdown was lifted. This sector was also a significant contributor to the change in the annual inflation rate, explaining 14% of its change.
At the end of the lockdown, the Accommodation & Food Services and Wholesale & Retail sectors presented 30% furlough by value,

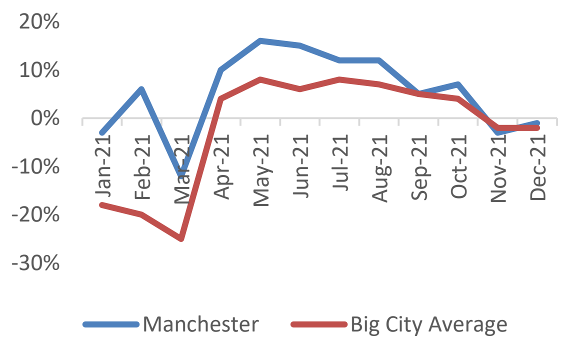
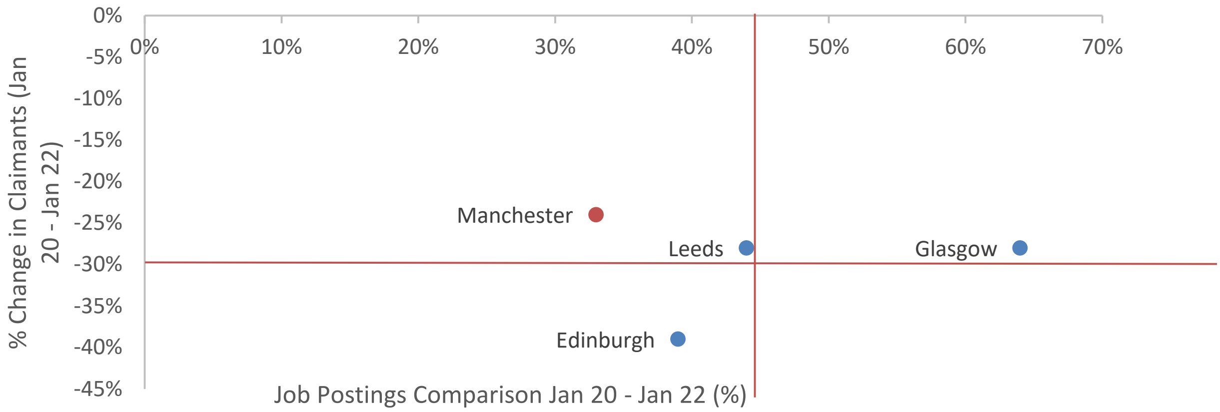


Figure 25: Manchester - Spend per Customer (Monthly Change)

D.4 Post-Pandemic Economic Recovery

The graph below shows the relationship between the change in benefits claimant count and job postings between January 2021 and January 2022. Manchester is in the least preferable quadrant, where claimant rates haven't decreased below the average, while job postings are also lower than the average. This indicates that the City is in a more fragile economic position and that employment growth has been slow to recover.



In 2020, Manchester's authorities published a couple of comprehensive plans to reinvigorate the city via 3 pillars: people, place and prosperity.

- In September 2020, the Greater Manchester Combined Authority (GMCA) issued "Living with Covid Resilience Plan", which aims to layout a coping plan for the next 12 months. The plan provided urgent support to sectors with lasting impacts from Covid-19 such as Retail and Hospitality, supports better employment standards, and skills development, and fast tracks investment opportunities from wider Government Fundings to stimulate economic growth.

- In November 2020, the Manchester City Council issued Powering Recovery: Manchester's Recovering and Investment Plan. Key priorities include:

    1. Improving the public Realm and creating the conditions for new development, and redevelopment, in the city centre

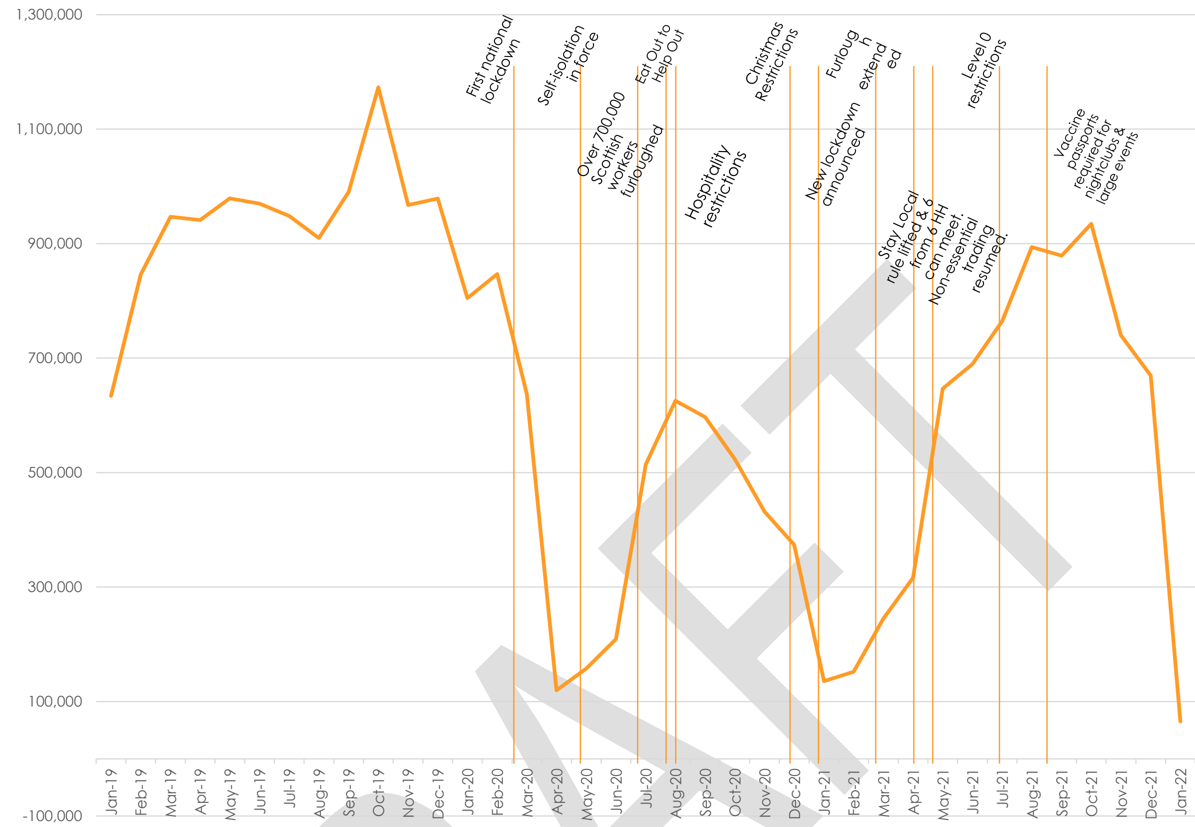
    2. Removing barriers to new commercial and residential development

    3. Improving transport and movement int the city centre

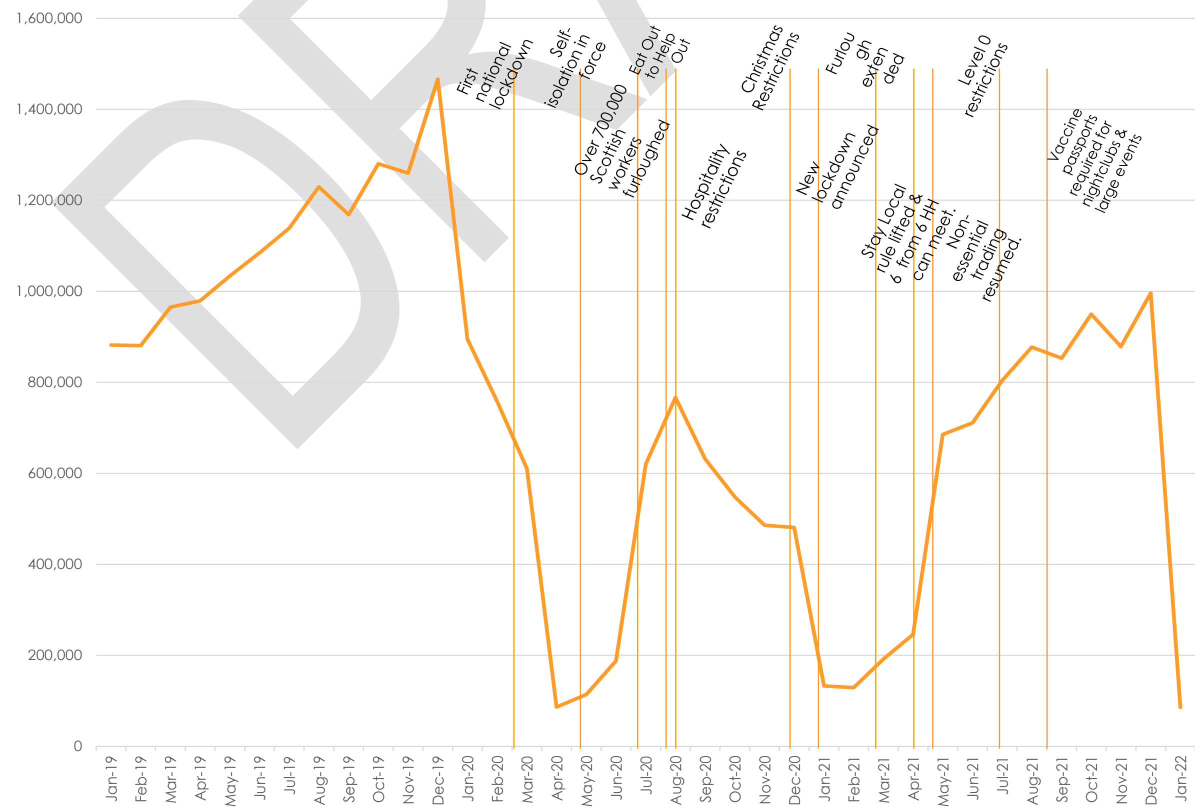
    4. Accelerating investment and development to help boost the local construction industry and supply chain

Appendix E Street-by-Street Footfall

Buchanan Street near Buchanan Galleries Entrance



Buchanan Street near Gordon Street Junction



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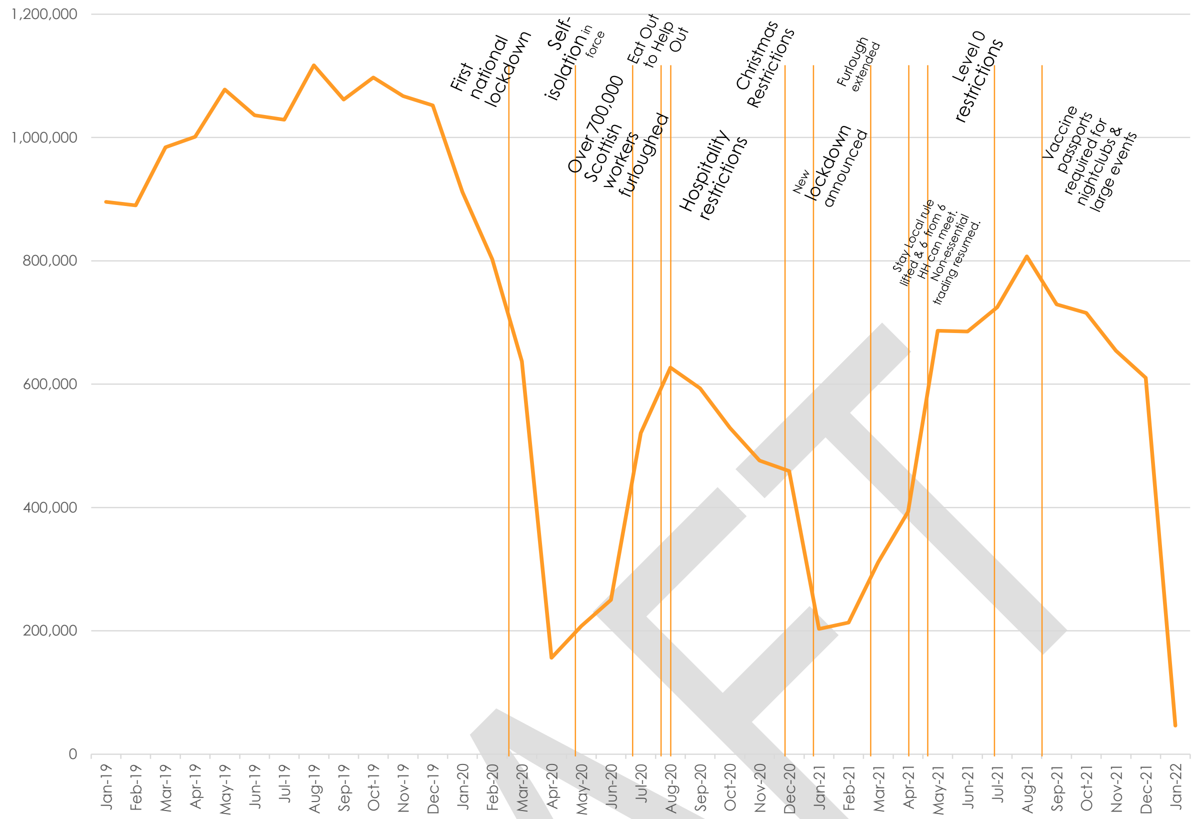
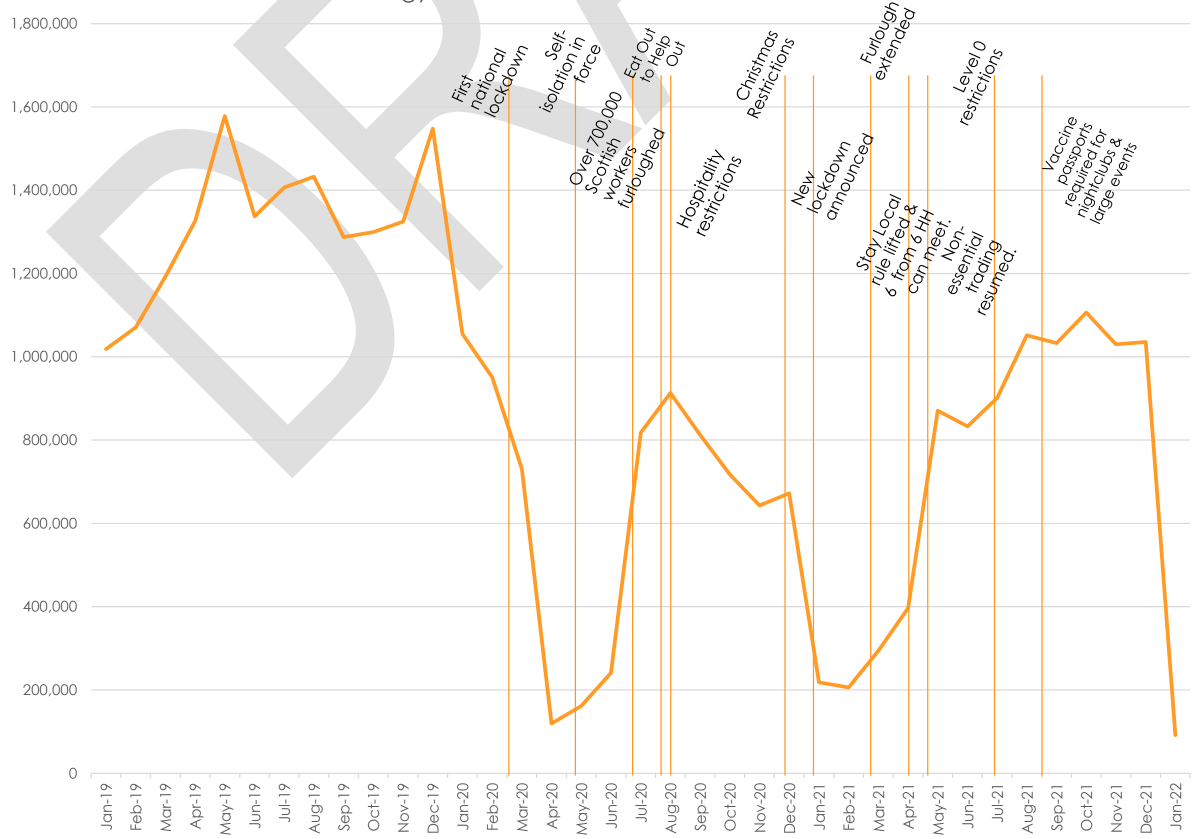
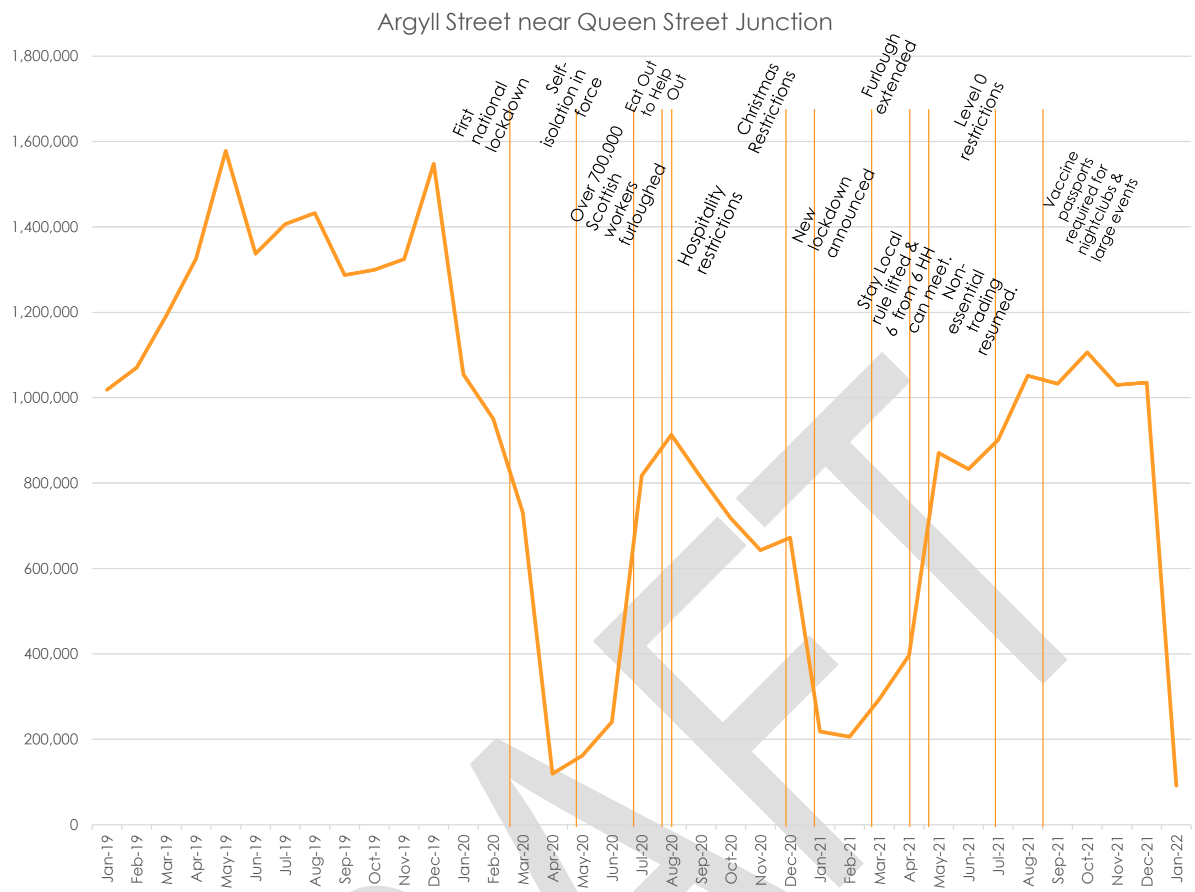


Argyll Street near Queen Street Junction

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Self-isolation in force
Over 700,000 Scottish workers furloughed
Eat Out to Help Out
Hospitality restrictions
Christmas Restrictions
New lockdown announced
Furlough extended
Stay Local rule lifted & 6 from 6 HH can meet. Non-essential trading resumed.
Level 0 restrictions
Vaccine passports required for nightclubs & large events
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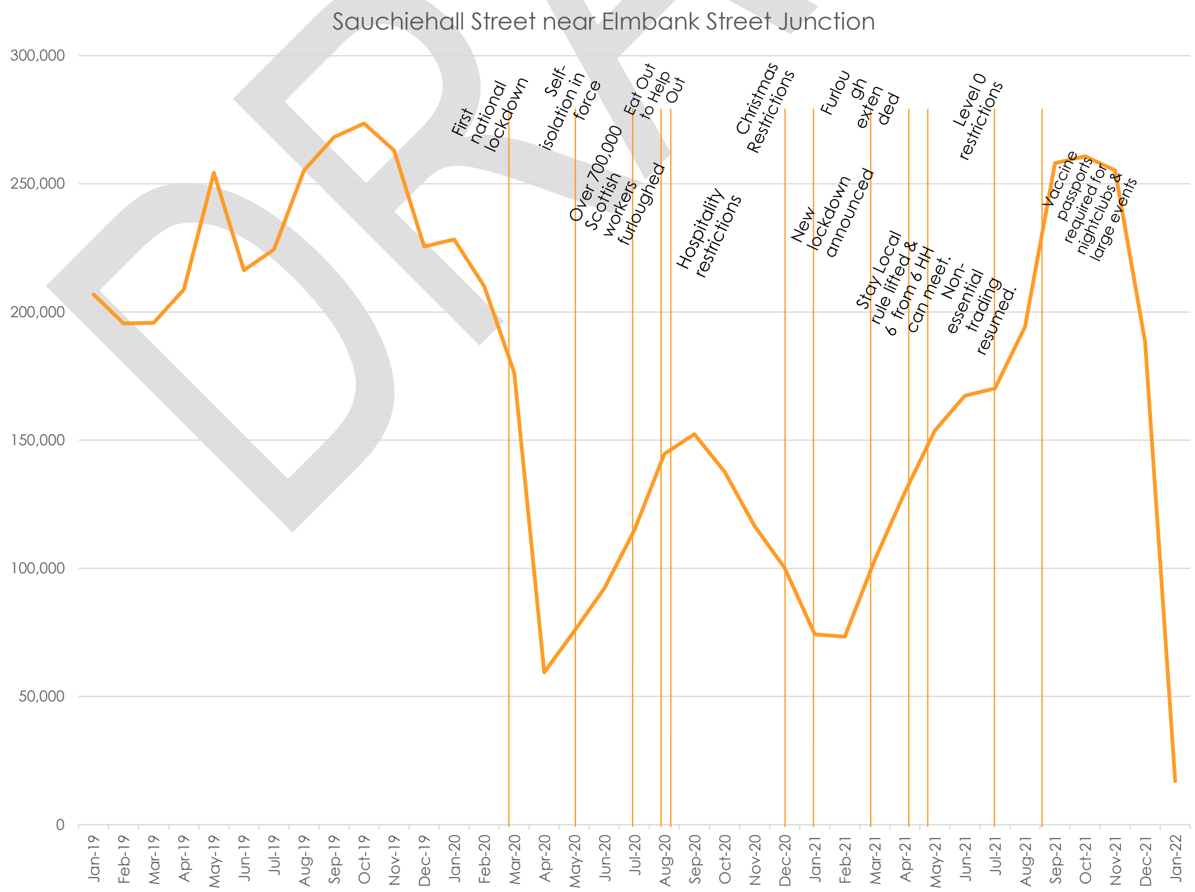
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