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# GLASGOW CITY CENTRE

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## ECONOMIC HEALTH CHECK

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April 2018  
NO. 19



Welcome  
to the nineteenth  
edition of

# Glasgow city centre's ECONOMIC HEALTH CHECK:

Welcome to the nineteenth edition of Glasgow city centre's Economic Health Check: a progress report on how the city centre is performing against a range of indicators. This edition, produced by the City Centre Regeneration Team within GCC's Development and Regeneration Services, covers the period July-December 2017 (unless otherwise stated).

## What is the Health Check?

The objective of the Health Check is to track the impact of economic activity on the city centre, and to provide a baseline from which future performance can be benchmarked.

## Trends

The table below provides an at-a-glance colour coded trend indicators.

Colour codes as follows:

- - Improvement
- - Relative stability
- - Decline

### Crime/ASB

Crime/ASB figures have overall declined

### Footfall

Average headline/overall footfall has decreased while Nitezone footfall has increased

### Planning & Development

City Centre retail applications have shown a downward trend but still remain high compared to previous years

### Vacant units

Average vacancy rates have remained stable since last edition

### Tourism

Glasgow Airport Passenger levels have shown a steady rise

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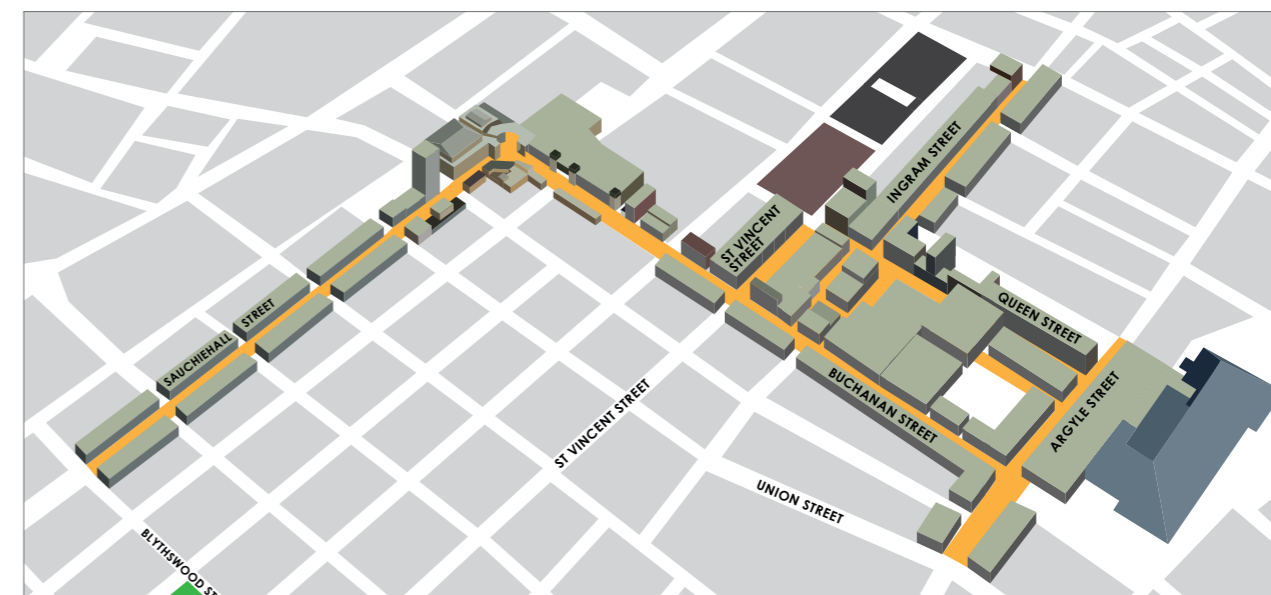
## STYLE MILE: Background and Area Map



The "Style Mile" relates to the square mile in the heart of Glasgow's city centre and is the principal retail area containing many unique independent designer and flagship stores for British and international retailers. A map and retail and visitor guide can be found online at

<https://peoplemakeglasgow.com/>

The Style Mile is a public-private partnership initiative to promote, protect and enhance Glasgow's city centre retail offering.



## TOP 10 BRITISH RETAIL CENTRES

Harper Dennis Hobbs<sup>1</sup> have ranked the top 50 British retail centres by the total retail spend attracted to each centre. The Retail Spend Potential is calculated based on the supply and demand characteristics of each centre. Glasgow is currently ranked in second place.

## TOP 10 RETAIL CENTRES BY EXPERIAN REPORT

The most recent Experian report<sup>2</sup> (ranking the UK's top retail centres based on comparison spend (£m) continues to show Glasgow in second place.

## TOP 10 LOCATION CENTRES BY JAVELIN GROUP

Javelin Group is described as Europe's leading specialist retail and ecommerce consultancy and work with many of the regions largest retailers and distributors including most of the UK's top 20 retailers. Their VENUESCORE Report 2017<sup>3</sup> evaluates locations in terms of their provision of multiple retailers. A score is attached to each operator which reflects their overall impact on shopping patterns. The resulting aggregate scores are then ranked. The top ten scores are shown below. Whilst London's West End ranks far higher than any other location (with 1,625 points), the VENUESCORE report considers it comprised of a number of separate (albeit interlinked) retail venues. As a result, Glasgow currently ranks in second place.

<sup>1</sup> Harper Dennis Hobbs Retail Centre Reports 2017

<sup>2</sup> <http://www.experian.co.uk/marketing-services/news-retailscape-uk-retail-centres-best-placed-to-thrive.html>

<sup>3</sup> Javelin Group VENUESCORE 2017

### TOP 10 BRITISH RETAIL CENTRES

1. **LONDON WEST END**  
£9,141,226,0644
2. **GLASGOW**  
£4,260,877,222
3. **BIRMINGHAM**  
£3,738,666,154
4. **MANCHESTER**  
£3,534,636,565
5. **LEEDS**  
£3,180,292,167
6. **LIVERPOOL**  
£3,102,829,857
7. **NOTTINGHAM**  
£3,003,776,127
8. **CARDIFF**  
£2,798,170,147
9. **NEWCASTLE UPON TYNE**  
£2,796,940,154
10. **EDINBURGH**  
£2,346,843,910

### TOP 10 BRITISH RETAIL CENTRES

	LOCATION	TYPE OF RETAIL CENTRE	COMPARISON SPEND (£M)	LIKELIHOOD TO BUY ONLINE
1.	LONDON WEST END	CITY CENTRE	£4,465	5
2.	GLASGOW CENTRAL	CITY CENTRE	£1,939	4
3.	BIRMINGHAM CENTRAL	CITY CENTRE	£1,561	2
4.	MANCHESTER CENTRAL	CITY CENTRE	£1,549	2
5.	LIVERPOOL CENTRAL	CITY CENTRE	£1,540	2
6.	LEEDS CENTRAL	CITY CENTRE	£1,447	3
7.	WESTFIELD STRATFORD	MALL	£1,371	1
8.	EDINBURGH PRINCES STREET	CITY CENTRE	£1,325	6

\*1 = LOW LIKELIHOOD TO BUY ONLINE 10 = HIGH

### VENUESCORE REPORT 2015 - 2016

1. **MANCHESTER**  
780
2. **GLASGOW**  
776
3. **LEEDS**  
659
4. **BIRMINGHAM**  
640
5. **LIVERPOOL**  
548
6. **CARDIFF**  
516
7. **BRIGHTON**  
503
8. **NOTTINGHAM**  
500
9. **EDINBURGH**  
498
10. **NEWCASTLE UPON TYNE**  
450

## 1. SOCIO ECONOMIC PROFILE OF THE CITY CENTRE (Ward 10)

### 1.1 POPULATION<sup>4</sup>

The estimated population of Ward 10 is 30,184.  
Of this, 15,866 are males and 14,318 are females.

### 1.2 HOUSEHOLDS AND HOUSING<sup>5</sup>

In the most recent census, there were 13,052 households in Ward 10.  
The average household size was 1.70

### 1.3 ECONOMY<sup>6</sup>

Employee job total is 144,000.  
103,300 of these are full time and 40,700 are part time.

**Table 1.1:** Population by age

0-4	5-11	12-15	16-29	30-44	45-64	65-74	75+
922	738	317	16,194	6,462	3,791	942	818

**Table 1.2:** Households and Housing

Total	Owner occupied	Private rented	Glasgow Housing Association	Other social rented
13,833	4,948	5,200	1,032	2,653

<sup>4</sup> National Records of Scotland Estimates 2015

<sup>5</sup> National Records of Scotland – 2011 census

<sup>6</sup> ONS 2015 Business Register and Employment Survey

**Table 1.3:** Employee jobs by broad industrial group

<b>Manufacturing, Construction and Utilities</b>	<b>4,100</b>
<b>Wholesale and Retail</b>	13,000
<b>Professional Services *</b>	73,500
<b>Public Sector Services **</b>	28,900
<b>Other Activities ***</b>	24,500

\*includes services in relation to business administration, information, communication, finance, insurance, property, professional, scientific and technical

\*\*includes services in relation to public administration, education and health

\*\*\* includes motor trades, transport, storage, accommodation, food services, arts, entertainments and recreation

## 2. FOOTFALL

### 2.1 Style Mile Footfall

The Style Mile footfall monitor is based on Springboard's Customer Counting and Measurement system that registers footfall at designated counters located throughout the Style Mile. These four core counters are positioned at the following locations:

**Buchanan Street at Kiehl's**  
**Argyle Street at Debenhams**

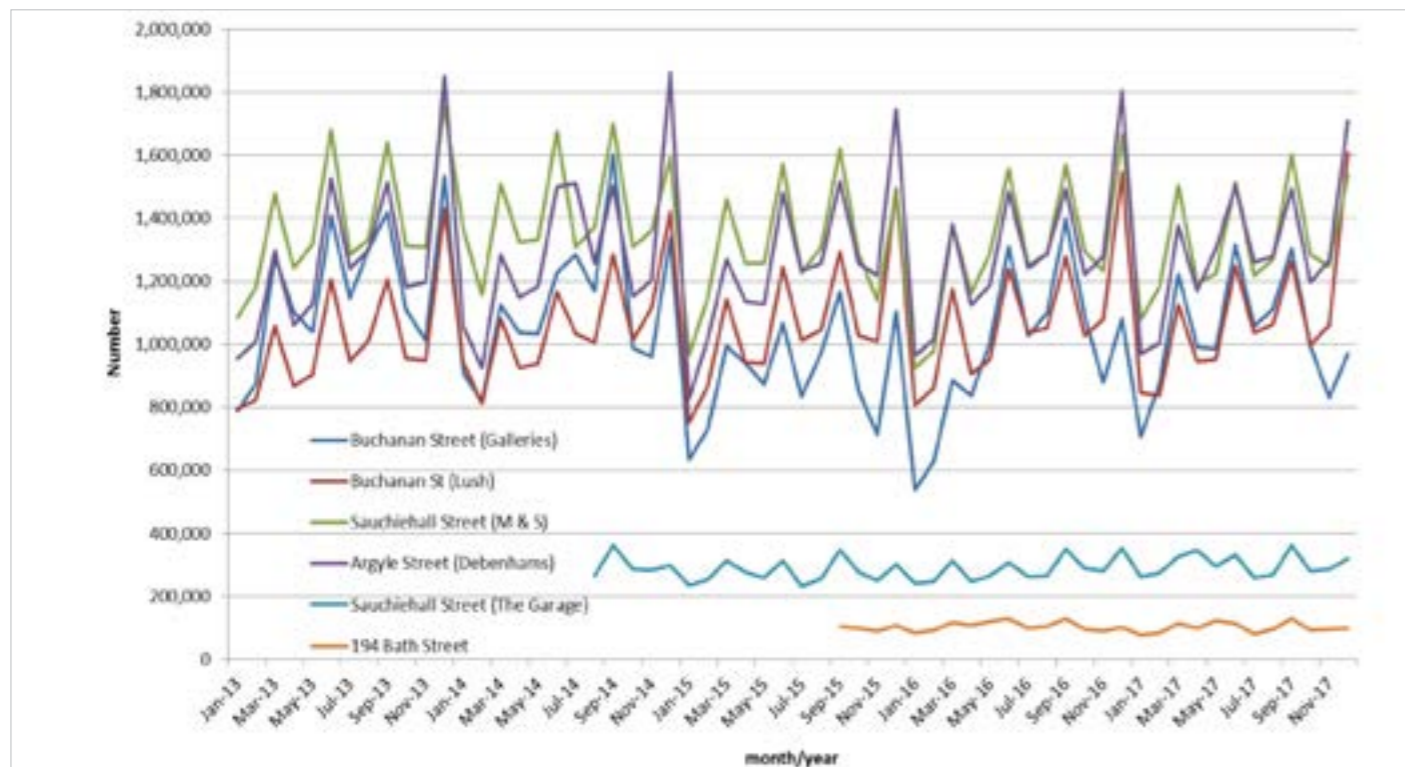
**Buchanan Street at Buchanan Galleries**  
**Sauchiehall Street at Marks and Spencer**

Additional counters have also been installed adjacent to the **Garage nightclub** at the **western end of Sauchiehall Street**, and at **194 Bath Street**.

**Table 2a**<sup>7</sup> below shows data collated from these counters from January 2013 – June 2017. Springboard counters record footfall over each 24-hour period and register both day and night time economy.

Total footfall recorded across all counters for the period of July-December 2017 decreased by 1.88% when compared against the same period in 2016. However, Buchanan Street at the Galleries saw a slight increase in footfall during this comparison period, recording a total increase of 0.16%.

**Table 2a:** City Centre Footfall January 2013 - June 2017



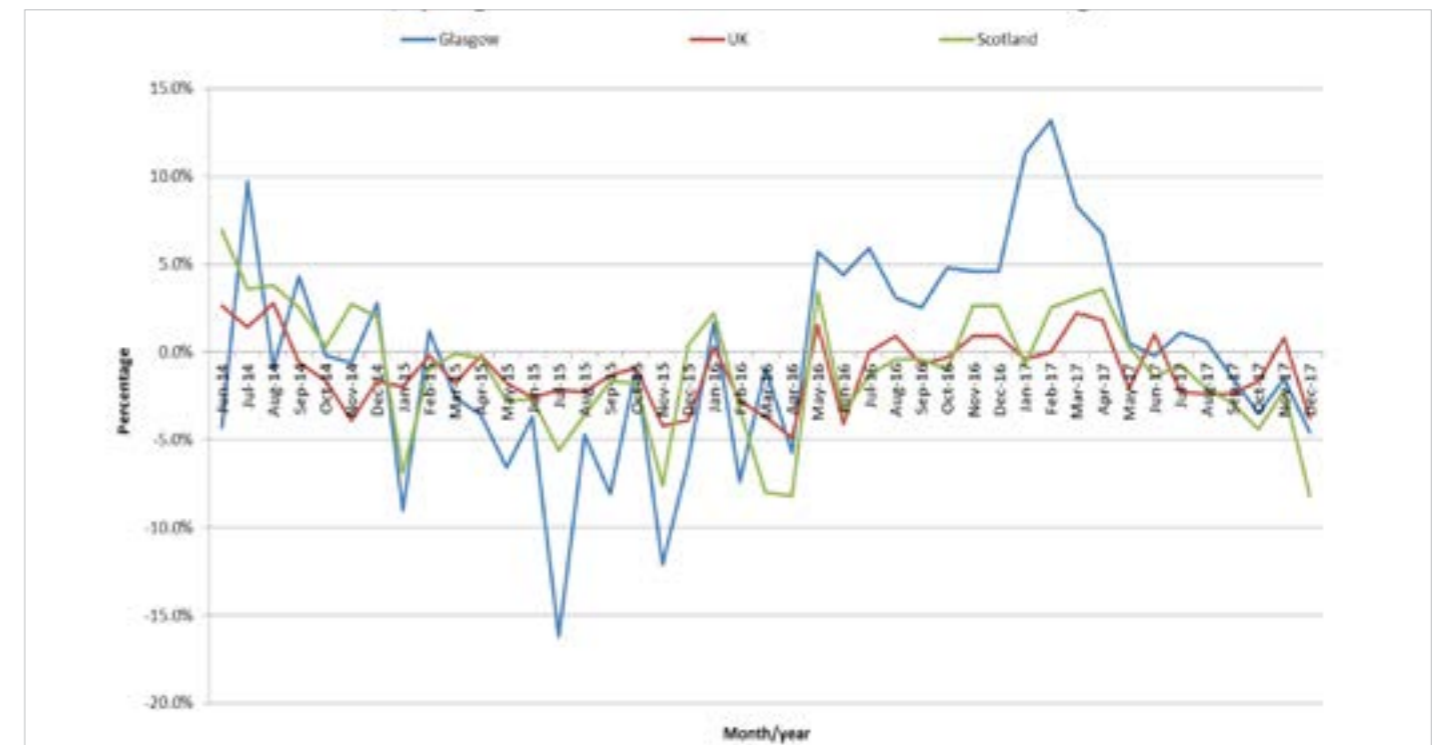
<sup>7</sup> Springboard, February 2018

The British Retail Consortium (BRC) / Springboard Retail Footfall Monitor gathers data on customer activity in town and city centre locations, and in out of town shopping locations, throughout the UK using the latest generation automated technology. The Monitor records over 60 million footfall counts per week at over 600 counting locations across 227 different shopping sites in 142 towns and cities across England, Northern Ireland, Scotland and Wales. The Monitor covers the main centres in each nation/region and a representative sample of secondary and smaller town centres.

The Monitor provides the only available broad-based measures of the footfall performance of town centres and out of town shopping locations in the UK. What is clear is that the structural changes in consumer behaviour recorded by Springboard over the last couple of years - largely driven by online activity - were exacerbated in 2017. The ease and expertise of consumers in using the internet to contrast and compare product and price has ultimately led to a lesser need for shoppers to visit destinations simply to browse for retail purchases.

**Table 2b**<sup>8</sup> illustrates the year-on-year change in Glasgow's footfall figures as compared against national comparator data drawn from the BRC/Springboard Retail Footfall Monitor from June 2014 to December 2017.

**Table 2b:** BRC/ Springboard Footfall Monitor - Year-On-Year % Change



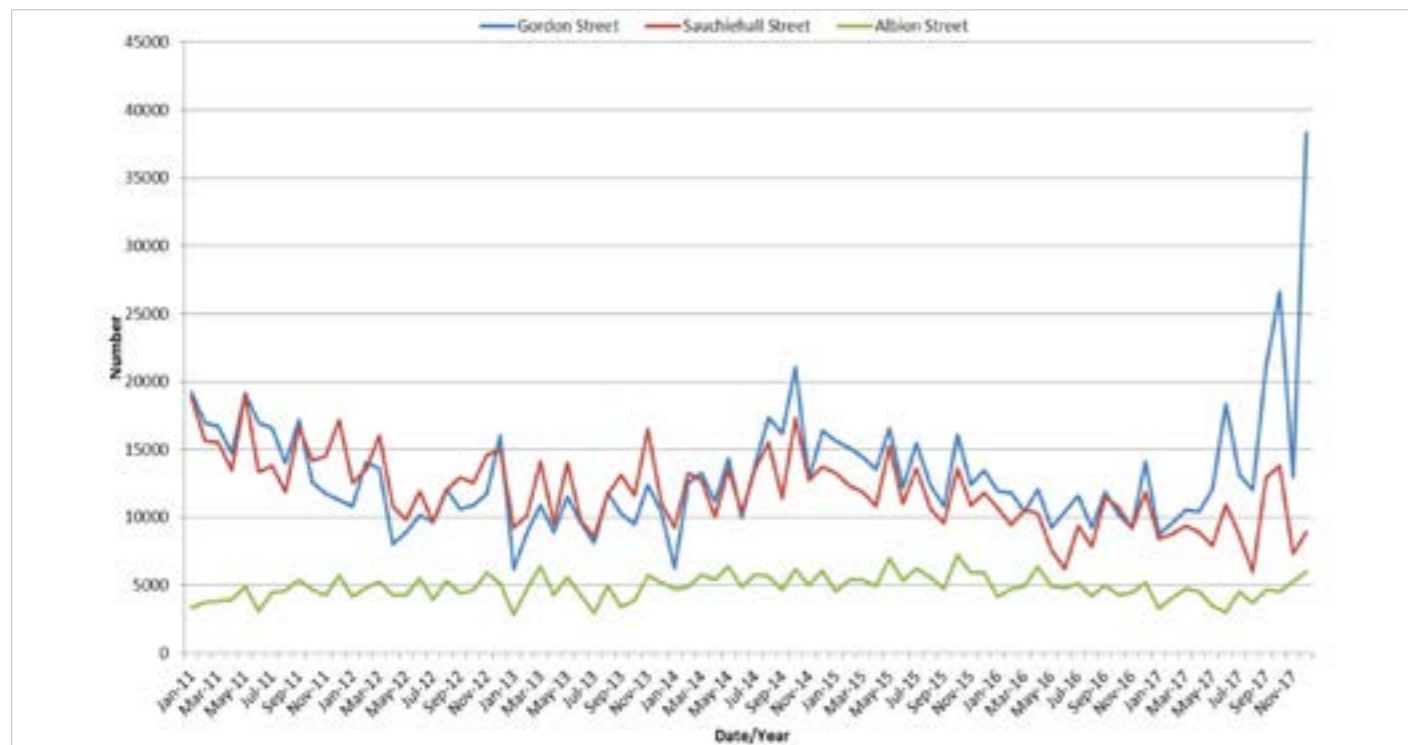
<sup>8</sup> BRC/ Springboard Footfall & Vacancies Monitor, February 2018

## 2.2 Nitezone footfall

**Table 2c<sup>9</sup>** Table 2c illustrates comparative Nitezone footfall figures from January 2011 – December 2017. These figures (relating to locations at Gordon Street, Sauchiehall Street, and Albion Street) are collated by taxi marshals who are present at the designated taxi pick up points between 10pm and 5am every Friday and Saturday night. They ensure the efficient, safe exit out of the city for users of the night time economy.

Average footfall figures recorded in Gordon Street and Sauchiehall Street appear to have stabilised since mid-2012. Albion Street figures have remained stable throughout. The total Nitezone footfall recorded over all three city centre precincts during the reporting period of July - December 2017 showed a change of 35.80% when compared to those recorded over the same reporting period in 2016. This correlates with UK figures showing an overall decline in footfall during day time hours with footfall after 5pm actually increasing.

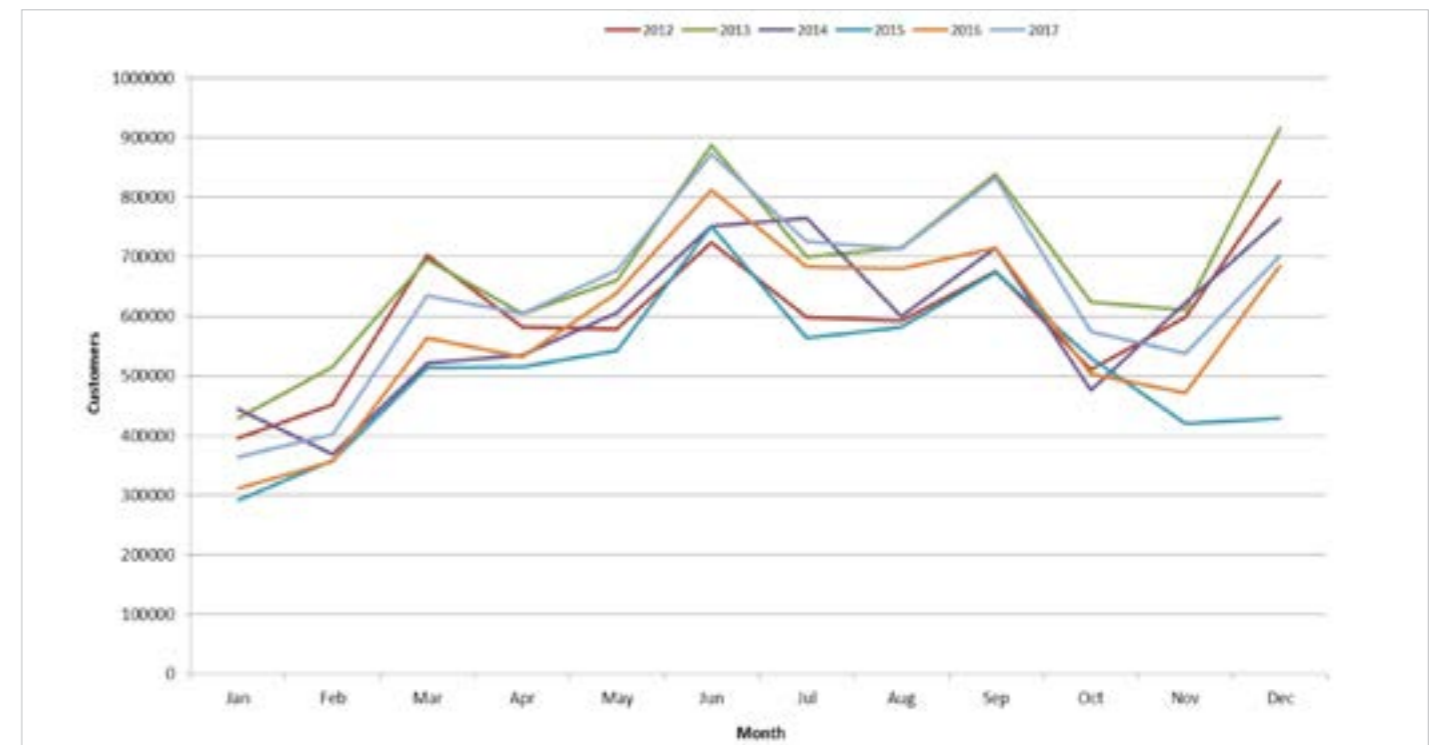
**Table 2c: Nitezone Footfall**



<sup>9</sup> CSG, August 2017

**Table 2d<sup>10</sup>** shows the footfall recorded by the core Style Mile counters during the hours of 6pm – 4am. This is the retail period usually referred to as the Night Time Economy. These figures were recorded within Glasgow Style Mile from January 2012 to December 2017.

**Table 2d: Glasgow Night Economy**



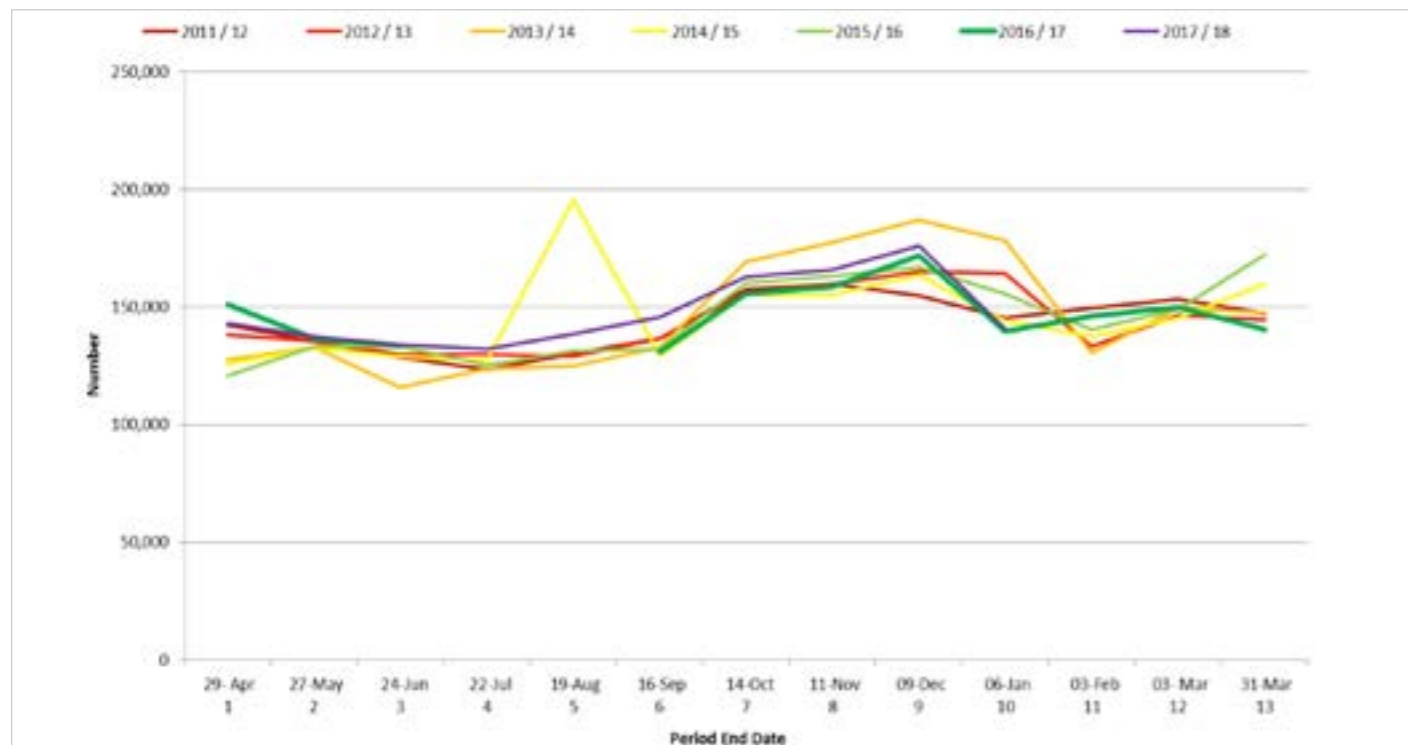
<sup>10</sup> Springboard, February 2018

### 2.3 SPT Footfall

SPT have thirteen reporting periods in which they collate Subway footfall data based on numbers boarding (going through the barrier). These periods are based along financial accounting periods.

**Table 2e<sup>11</sup>** shows the footfall recorded for each reporting period from 2011/12 onwards (it should be noted that the Subway suspension period took place between reporting period 4 and reporting period 5 in 2016/17). This edition of the Healthcheck looks at data collected from reporting period 6 to reporting period 10 in 2017/18. A comparison of this data with the same data collected 12 months previously shows an increase of 4.63% in total footfall figures.

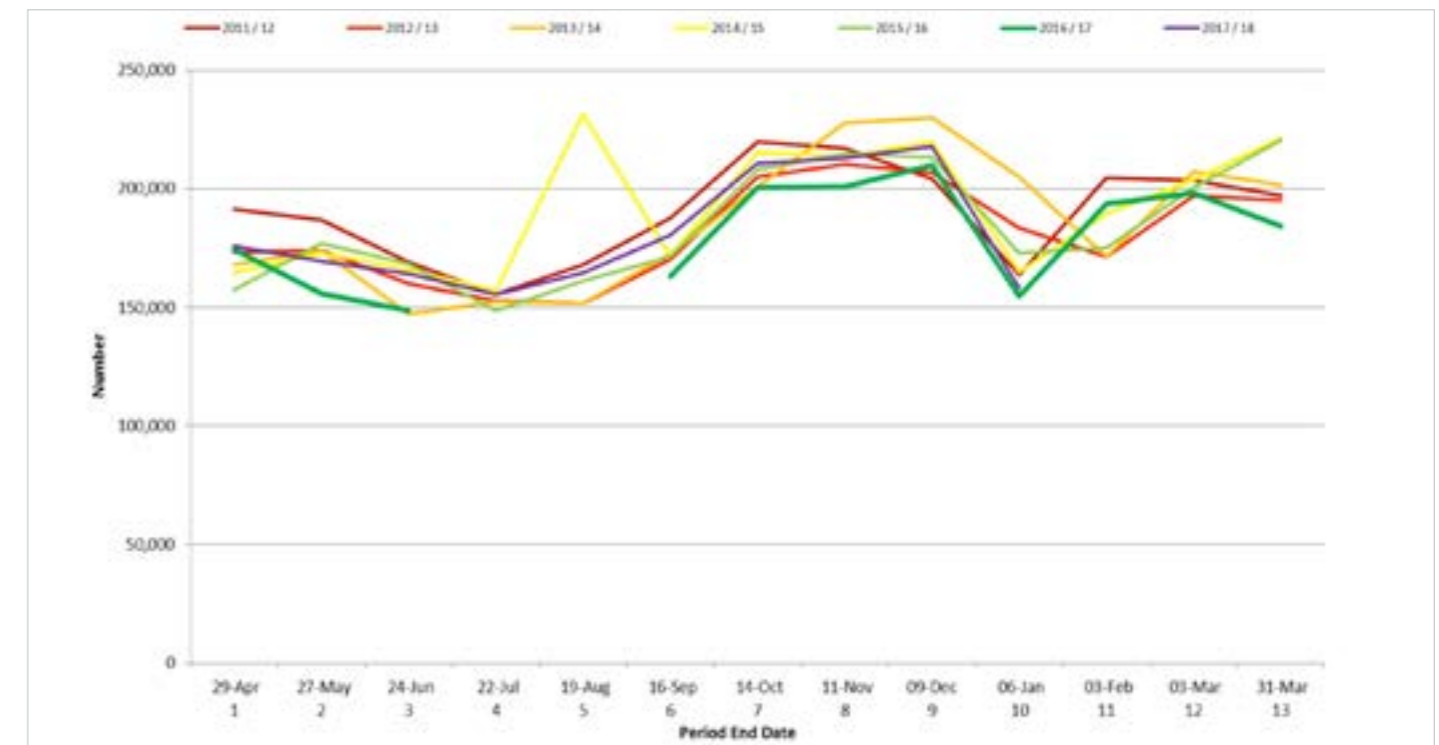
**Table 2e:** St. Enoch Subway Footfall



<sup>5</sup> SPT, March 2018

**Table 2f<sup>12</sup>** shows that Buchanan Street Subway station records a higher footfall than St Enoch Subway station. This edition of the Healthcheck looks at data collected from reporting period 6 to reporting period 10 in 2017/18 (it should be noted that the Subway suspension period took place between reporting period 4 and reporting period 5 in 2016/17). A comparison of this data with the same data collected 12 months previously shows an increase of 5.51% in total footfall figures.

**Table 2f:** Buchanan Street Subway Footfall

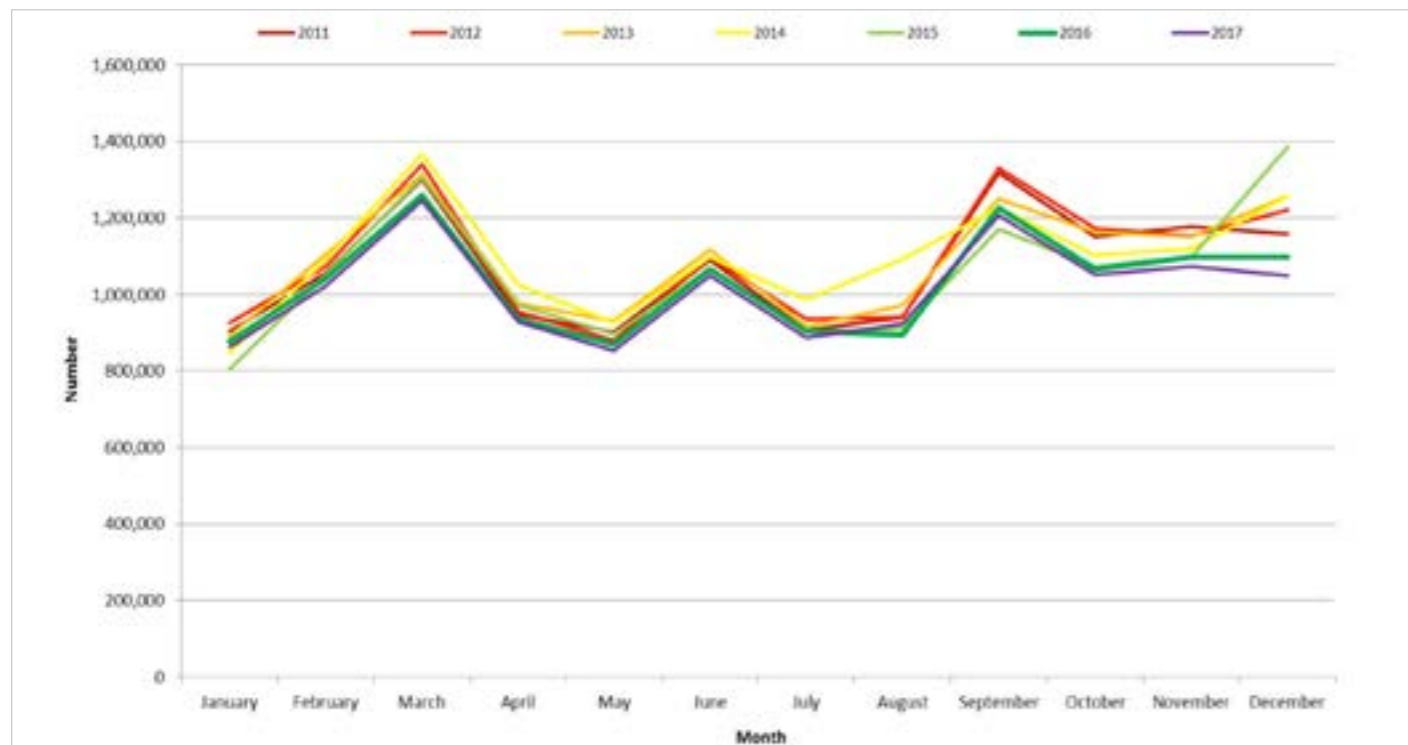


<sup>12</sup> Ibid

## 2.4 Bus Station Footfall

**Table 2g**<sup>13</sup> illustrates the footfall at Buchanan Bus Station. Total footfall recorded at this location between July to December 2017 showed a change of -1.56% against the figures recorded over the same period in 2016.

**Table 2g:** Buchanan Bus Station Footfall

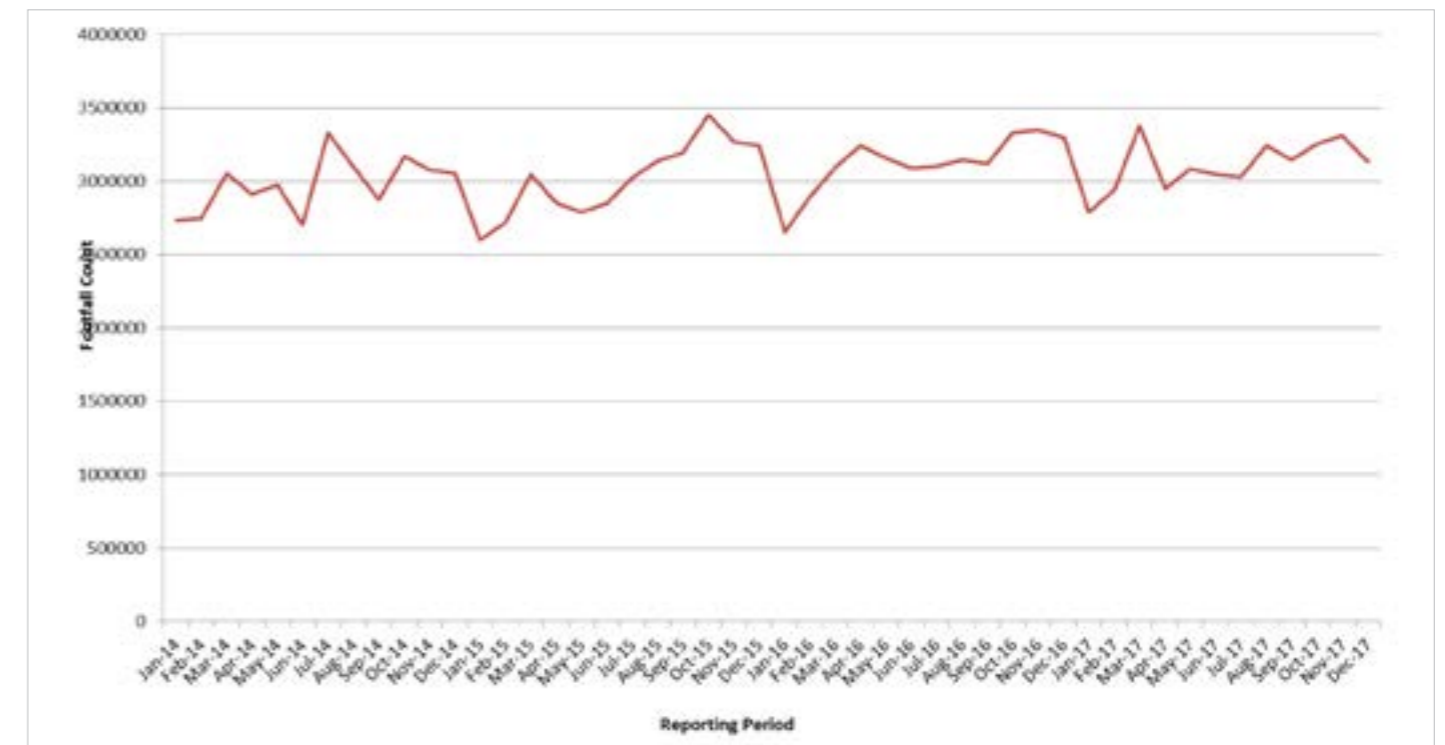


<sup>13</sup> Ibid

## 2.5 Train Station Footfall

**Table 2h**<sup>14</sup> illustrates the footfall count recorded by Network Rail at Glasgow Central Train Station. Total annual footfall figures recorded from July to December 2017 showed a decrease of 1.14% against the figures recorded during the same reporting period in 2016.

**Table 2h:** Glasgow Central Station - Footfall Count 2014 - 2017



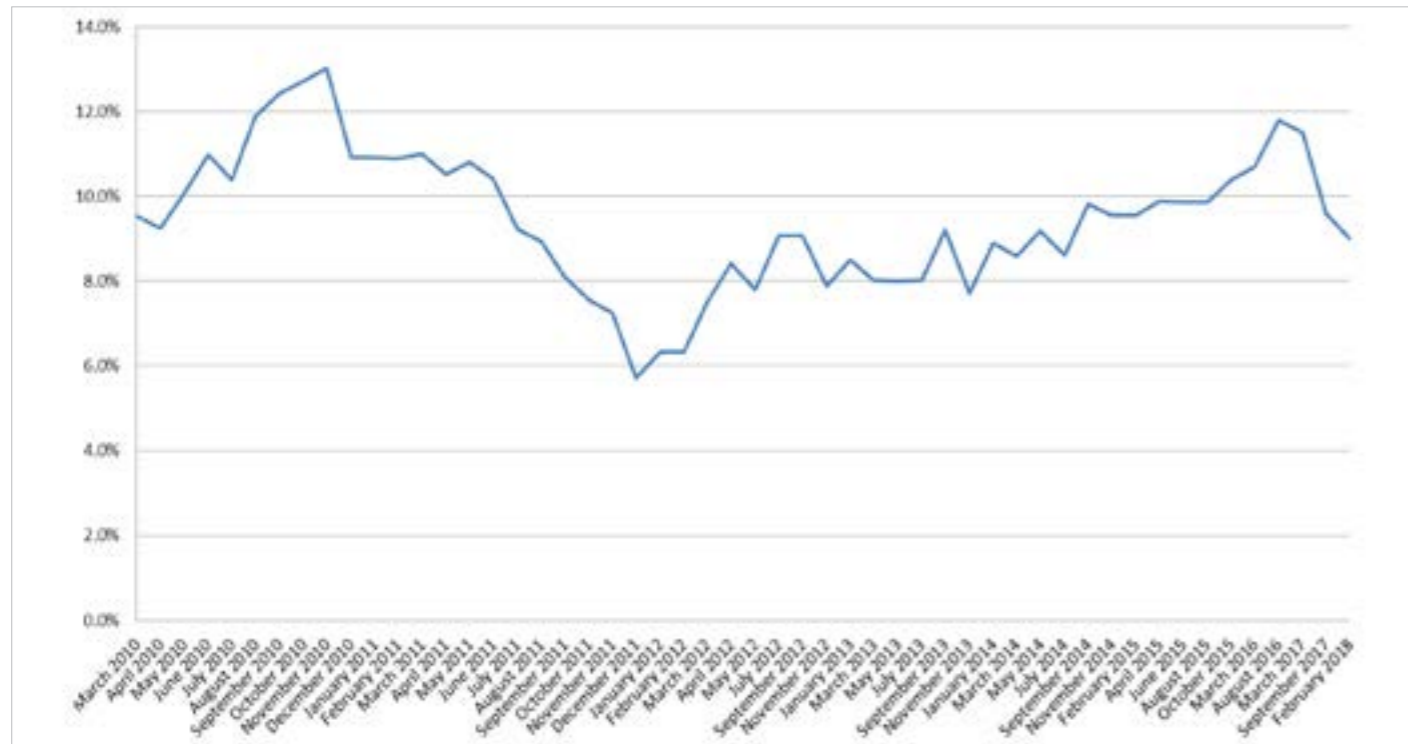
<sup>14</sup> Network rail, February 2018



#### 4. VACANT UNITS (STYLE MILE)

**Table 3a**<sup>15</sup> illustrates the city centre's ground floor vacant unit trend since March 2010. The Glasgow data is a record of the number of vacant units at street level and includes Class 1 (shops), Class 2 (financial, professional and other services – e.g. banks, Class 3 (food and drink – e.g. cafes and restaurants) and Sui Generis (not in any “use class” e.g. pub or hot food takeaways). It does not include vacant units within shopping centres. The vacancy rate is defined as the percentage of the ground floor units in the town centre that are vacant, and a vacant unit is regarded as one which is not trading at the time of the survey (whether or not it is let).

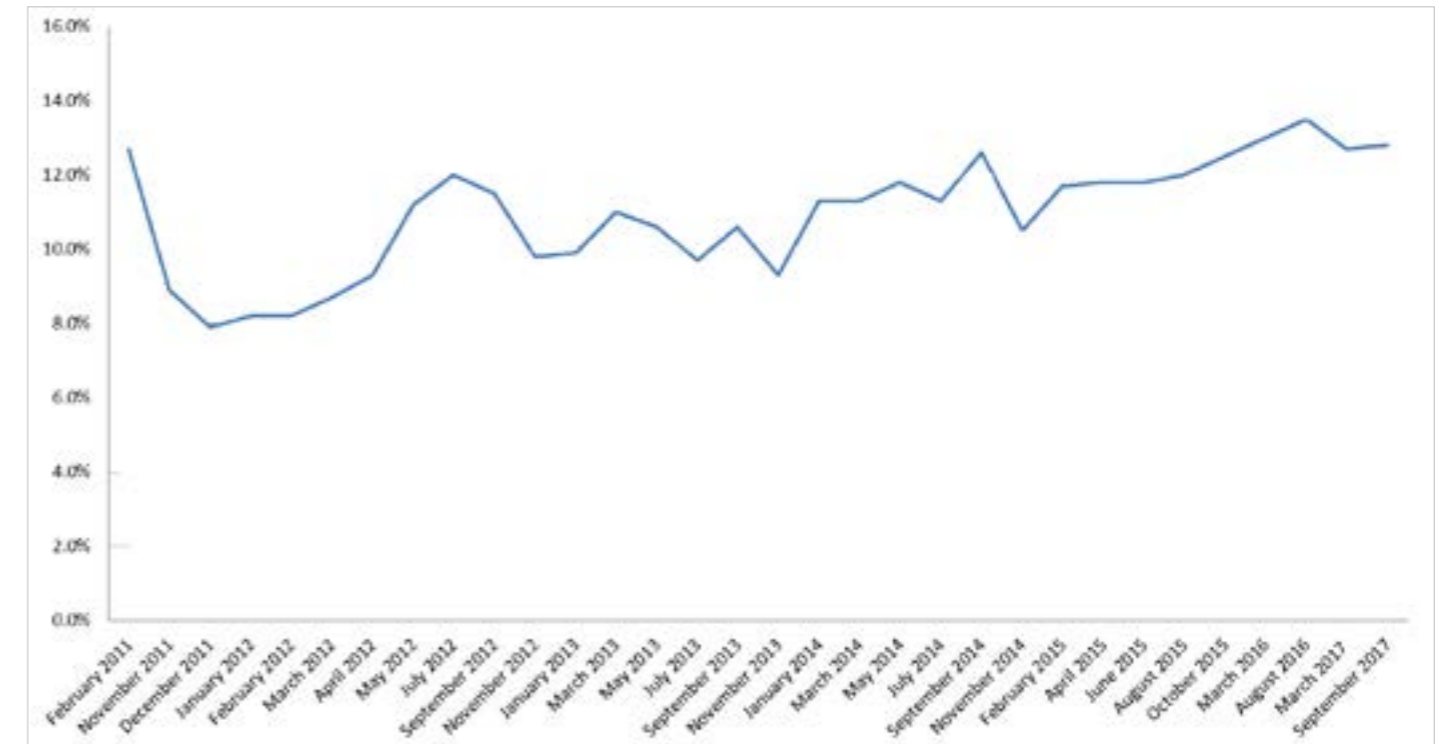
**Table 3a:** Style Mile: Street Level Vacant Units (%)



<sup>15</sup> GCC, March 2018

**Table 3b**<sup>16</sup> shows vacancy rates for the Style Mile including shopping centres as recorded at various points from February 2011 to February 2018. As a result, these rates are greater than that of ground floor only vacancy rates recorded in the Style Mile.

**Table 3b:** Style Mile: All Vacant Units (%)



<sup>16</sup> Ibid

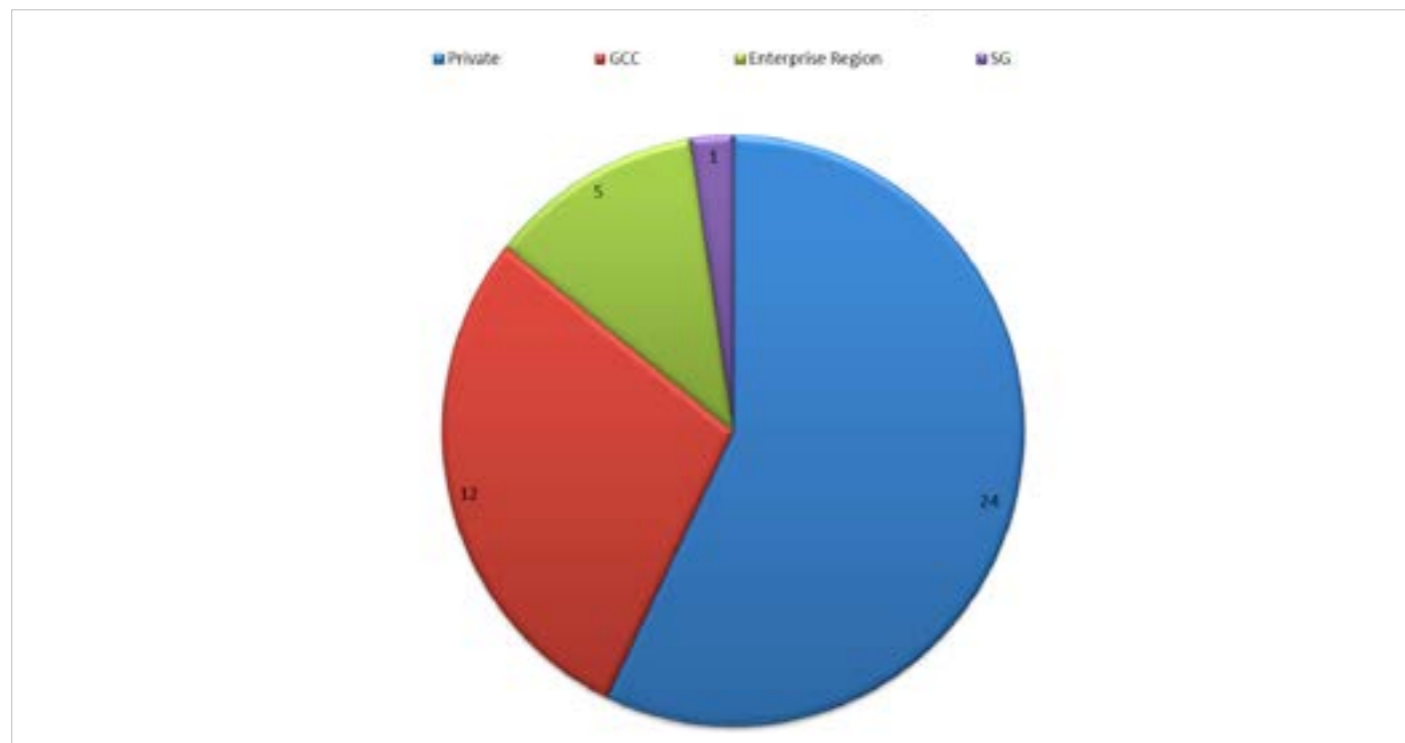
#### 4. VACANT SITES (CITY CENTRE)

Within the city centre area bounded by the M8, High Street and the River Clyde there are 42 sites comprising approximately 22.16 hectares of vacant / derelict land.

**Table 4a**<sup>17</sup> provides a breakdown of the ownership of these sites by number.

As indicated, the majority of sites are privately owned. Their potential land use is varied from residential to office, retail, civic and mixed use. The majority of sites appear to have had planning consents granted or are in the process of undertaking pre-application work. A number of sites have a temporary use, predominantly car parking, and various others have been temporarily landscaped. Development on these sites can be slow because of the nature, scale and complexity of vacant sites, as well as the impact of the global economic environment.

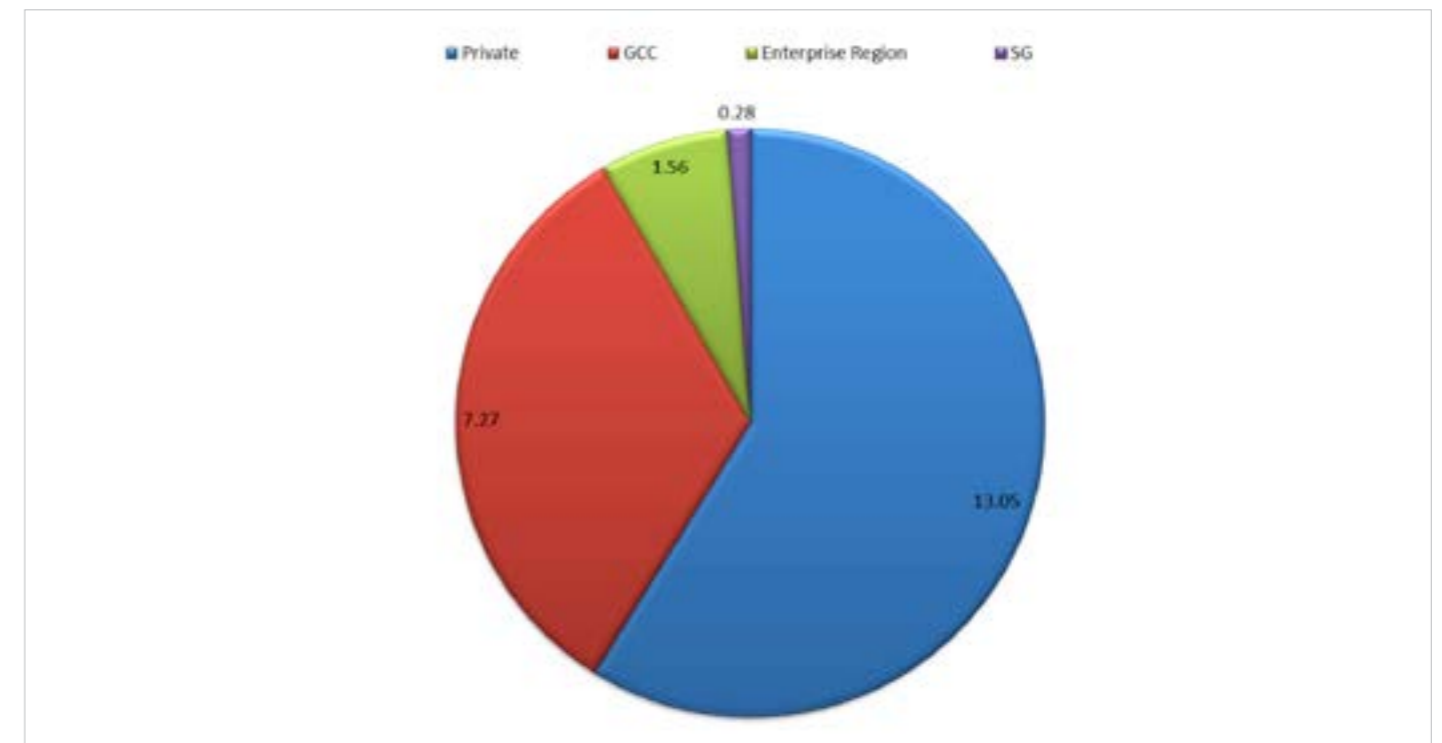
**Table 4a:** Number of Vacant Sites within the City Centre



<sup>17</sup> GCC, February 2018

**Table 4b**<sup>18</sup> provides a breakdown of the ownership of these sites by area.

**Table 4b**<sup>18</sup>: Area of Vacant Sites Within the City Centre



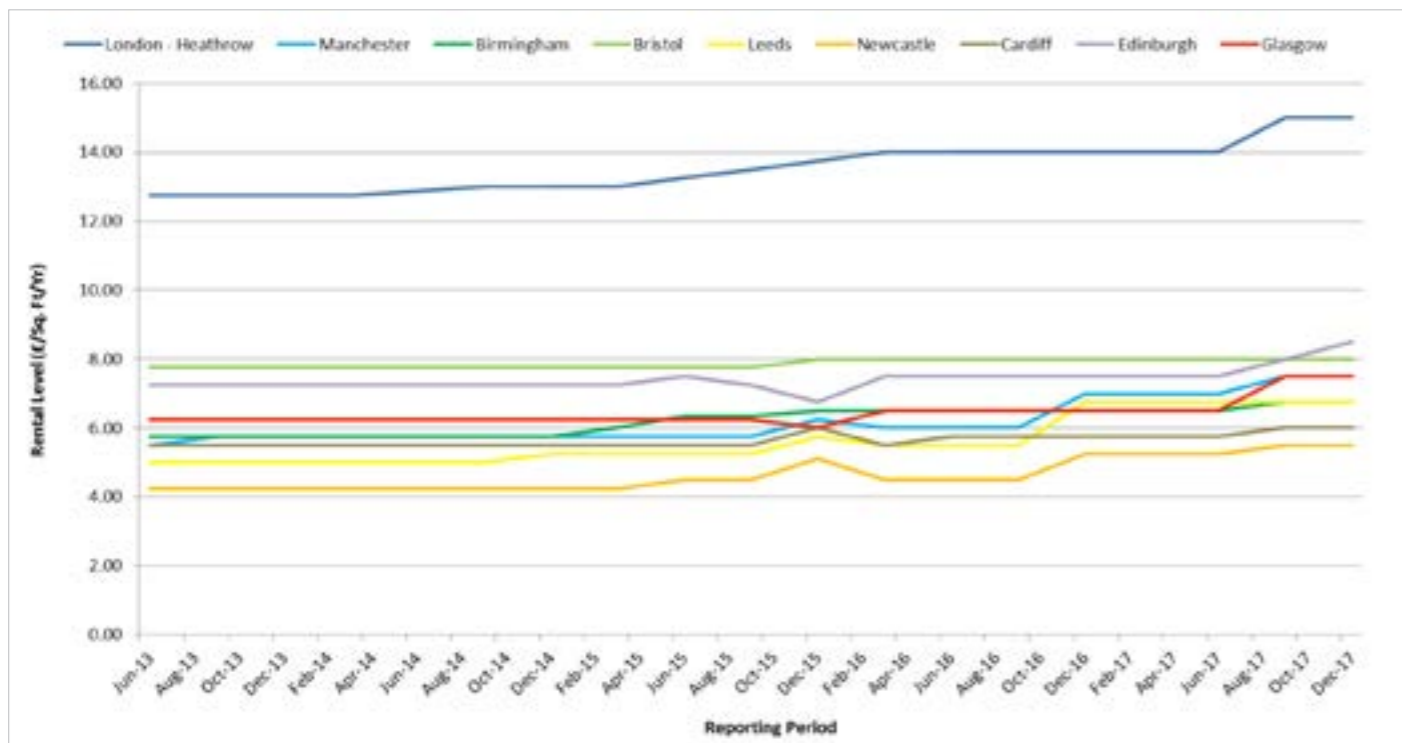
<sup>14</sup> Ibid

## 5. UK PROPERTY MARKET TRENDS

Cushman & Wakefield is a privately held commercial real estate services firm which provides a range of services globally. Their UK Quarterly MarketBeat is a review of market trends and price movements in the UK property markets, which includes an analysis of yields and rental values for the retail, office, industrial, hotel and residential property sectors. It should be noted that these reports are prepared solely for information purposes and do not purport to be a complete description of the markets or developments contained therein. Further information can be found via <http://www.cushmanwakefield.co.uk/en-gb/research-and-insight/local-reports/>.

**Table 5a**<sup>19</sup> shows the indicative prime industrial rent levels over the relevant reporting periods for Glasgow and various other UK comparator locations.

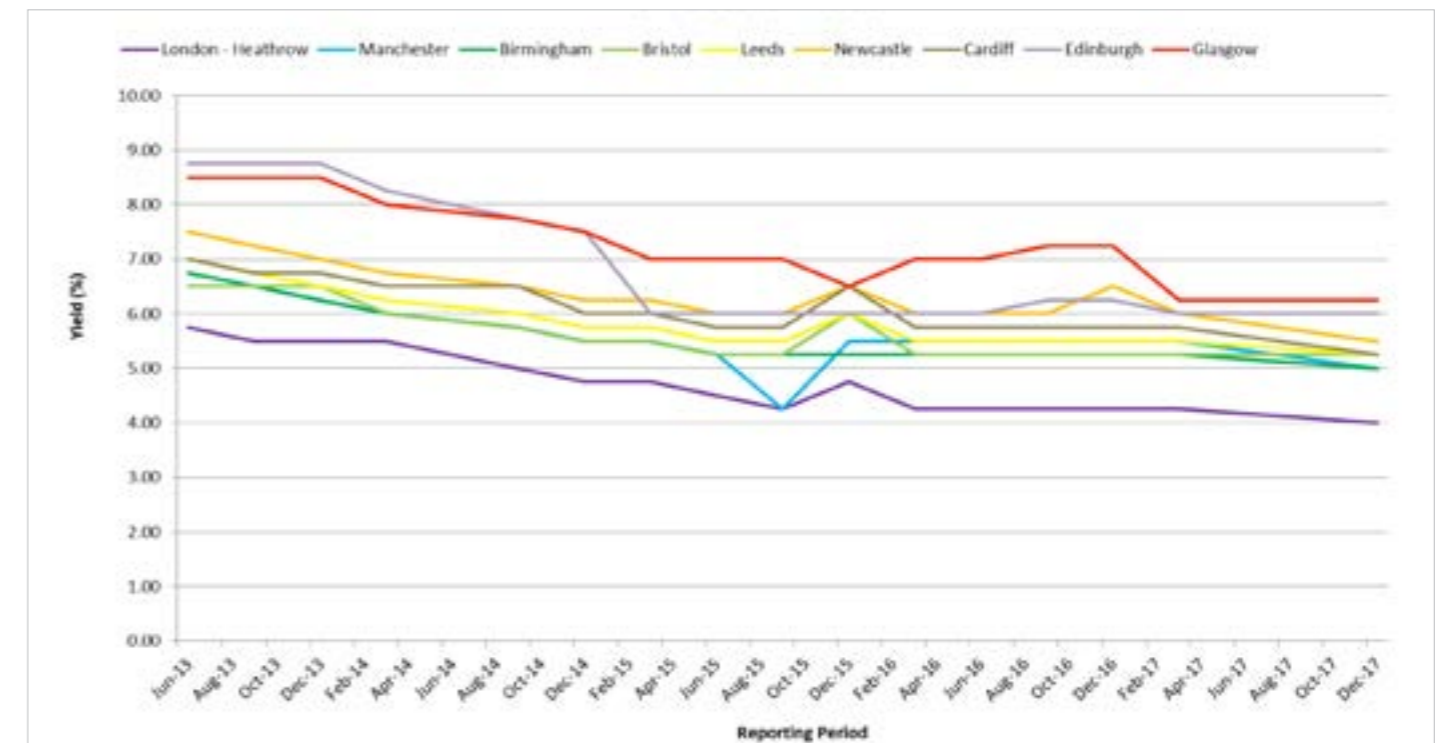
**Table 5a:** Prime Industrial Rents



<sup>19</sup> Cushman & Wakefield, February 2018

**Table 5b**<sup>20</sup> shows the indicative prime industrial yields over the relevant reporting periods for Glasgow and various other UK comparator locations. (Note: there is no current data for Glasgow for reporting period Jun-17)

**Table 5b:** Prime Industrial Yields



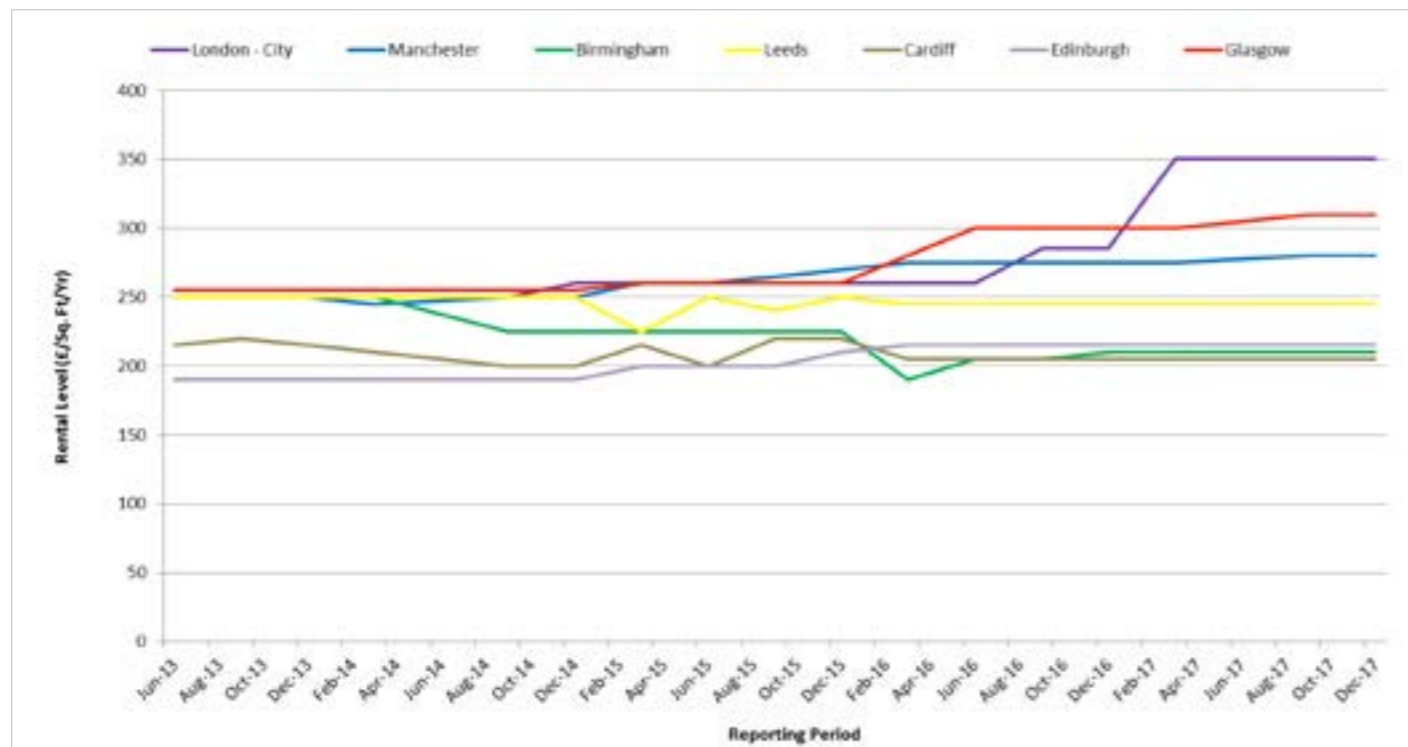
<sup>20</sup> Ibid



### 5.3 Retail

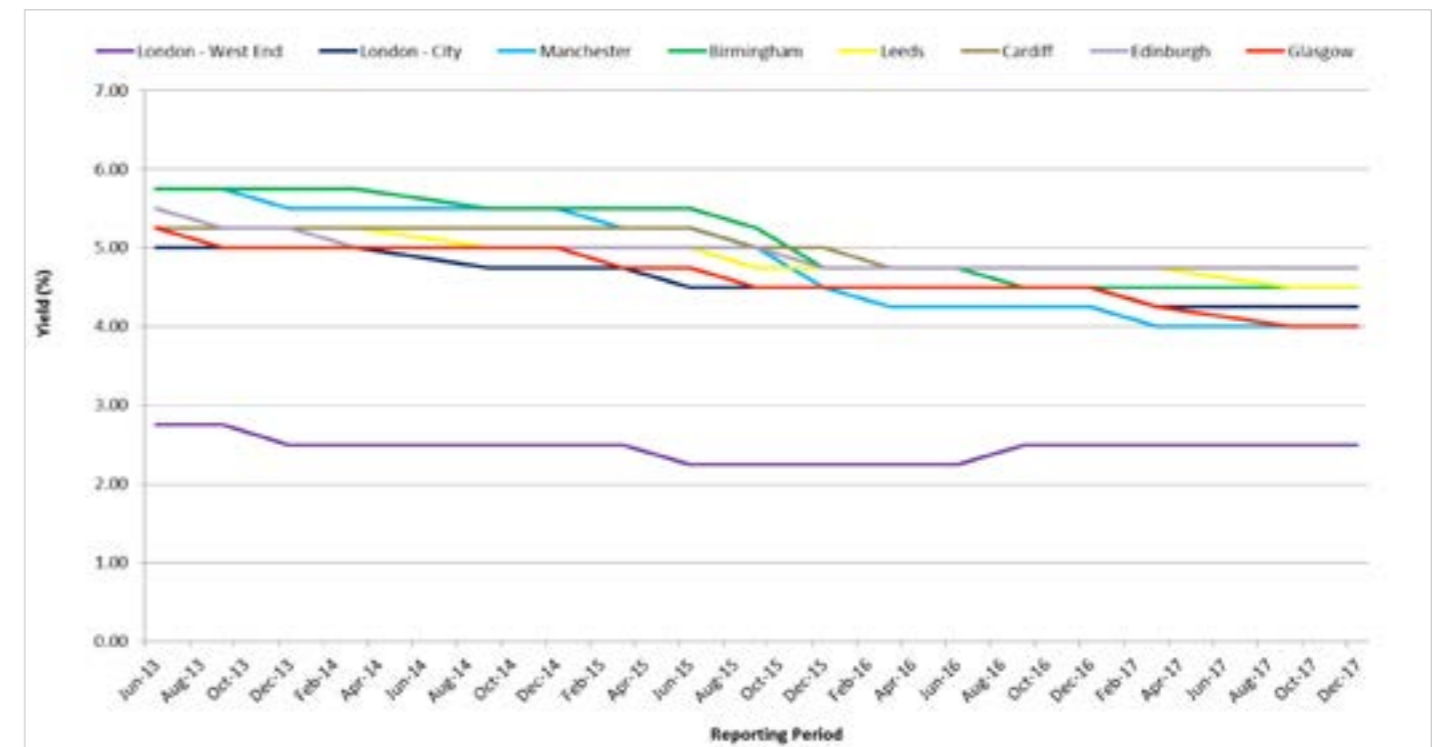
**Table 5e<sup>23</sup>** shows the indicative prime retail rental levels over the relevant reporting periods for Glasgow and various other UK comparator locations. Due to the discrepancy between its high rental level figures and the other comparator locations, London (West End) is not included in this table. Please also note that zoning practices can differ between cities.

**Table 5e: Prime Retail Rents**



**Table 5f<sup>24</sup>** shows the indicative prime retail yields over the relevant reporting periods for Glasgow and various other UK comparator locations. Please note that zoning practices can differ between cities.

**Table 5f: Prime Retail Yields**



## 6. ENVIRONMENTAL INDICATORS AND CRIME/ASB

### 6.1 Street Cleanliness

Clean Glasgow, launched by Glasgow City Council in February 2007, commissioned independent street cleanliness surveys of the city centre which have been undertaken by the national environment agency, Keep Scotland Beautiful (KSB). Whilst the annual city centre survey was not repeated in November 2013, the City Centre Regeneration team commissioned a renewal of this report for November 2014 with a view to maintaining this process going forward.

The area surveyed consists of approximately 168 street sites (transects) and the survey reflects the standard of cleanliness of these areas, achieved at the time of the survey and assessed in accordance with the Environmental Protection Act 1990 and its attendant Code of Practice on Litter and Refuse (Scotland) 2006. Criteria assessed include the general standard of cleanliness, sources of litter, types of litter, and adverse environmental quality indicators (AEQIs). Each transect is graded (from A to D) with each grade worth a requisite number of points. The overall city centre Cleanliness Index (CI) is then a reflection of the total points scored as a percentage of the total possible points available. The KSB report will be repeated annually.

The CI score for April 2017 was 60, with 83% of all transects surveyed found to be of an acceptable standard (i.e. Grade A, B or B+). The overall CI scores for the **city centre** surveys undertaken to date are as follow:

Period	Sep 2007	Nov 2008	Nov 2009	Nov 2010	Nov 2011	Nov 2012	Nov 2014	Nov 2015	Apr 2017
CI Score	66	66	64	66	66	62	64	60	60

As part of the independent surveys they conduct, KSB also report on various aspects of street cleanliness including Adverse Environmental Quality Indicators (AEQIs) i.e. common issues affecting the local environment within communities. The number of incidences of these issues recorded in each KSB report has been collated in **Table 6a** below.

**Table 6a**

	Sep-07	Nov-08	Nov-09	Nov-10	Nov-11	Nov-12	Nov-14	Nov-15	Apr -17
<b>Dog fouling</b>	2	2	1	1	1	4	1	2	2
<b>Graffiti</b>	12	10	13	16	17	15	4	27	52
<b>Vandalism</b>	1	1	0	1	0	0	0	1	2
<b>Weeds</b>	11	0	9	5	5	2	4	5	21
<b>Detritus</b>	8	11	12	10	12	9	7	7	34
<b>Gum</b>	28	31	66	57	16	46	32	87	79
<b>Fly-posting</b>	2	4	5	7	2	4	1	29	54
<b>Fly-tipping</b>	1	1	2	1	1	1	1	2	5

Established in 2016, the GCC-led Environmental Task Force is focused upon optimising environmental services across the Council Family and partner organisations, and delivering them at local level. Real time information from the public is gathered at the command centre in Bridgeton with 30 rapid response teams available to tackle the issues as quickly as possible. This includes dealing with environmental issues such as Fly-Tipping, Litter, Needle Uplifting, Dog Fouling, Fly-Posting, Graffiti and Environmental Enhancement.

The Local Environmental Audit and Management Systems (LEAMS) monitoring standard is used as an indicator for street cleanliness, audited by Keep Scotland Beautiful.

The KSB annual survey results for Glasgow **city-wide** cleanliness are shown in **Table 6b** as below.

**Table 6a**

Year	April	June	August (other LA)	October	December	KSB Validation	February (other LA)	Score
2010/2011	70	70	67	71	74	68	72	69
2011/2012	70	71	75	72	73	68	76	70
2012/2013	72	72	76	71	78	58	72	72
2013/2014	74	69	73	81	73	63	83	74

Please note that the methodology involved in the surveys for the year 2014/15 has changed. As a result of this the format of the scoring achieved has also changed to the following.

Year	Assessment 1 (Glasgow City CI)	Assessment 2 (Glasgow City CI)	Assessment 3 (KSB Validation)	Overall Score
2014/2015	82	85	76	81
2015/2016	69	82	80	77
2016/2017	63	79	76	77
2017/2018	79		57	

## 6.2 Key Performance Indicators (KPIs)

Community Safety Glasgow monitors various quarterly performance indicators relating to crime and antisocial behaviour<sup>25</sup>. Below is a sample of these indicators relevant to the city centre from October 2015 to December 2017. From April 2012 the data was collected by local authority ward rather than a larger area that had previously incorporated Partick West and Hillhead.

Ward 10 (Anderston/ City)	Oct-Dec 2015	Jan-Mar 2016	Apr-Jun 2016	Jul-Sep 2016	Oct-Dec 2016	Jan-Mar 2017	Apr-Jun 2017*	Jul-Sep 2017	Oct-Dec 2017
Square meterage of graffiti removed	3447	3201	2484	2702	2707	1994	737	1877	2736
Square meterage of flyposting removed	57	2	14	4	9	511	0	52	7
Fixed penalty notices issued (includes fly-tipping, dog fouling, litter, cigarette litter and chewing gum)	2236	2672	2167	2295	1724	1992	1577	1854	1208
Number of school, community and business clean-ups undertaken	81	78	81	98	98	96	57	91	105
Number of volunteers actively engaged with CSG through NIES <sup>23</sup>	198	196	232	426	314	210	378	378	561

\* It should be noted that data from April 2017 is now being provided for the Anderston City/Yorkhill Ward. Prior to this, data refers to the old Anderston City Ward.

<sup>25</sup> CSG, March 2018.

<sup>26</sup> Neighbourhood improvement and Enforcement Service.

## 6.3 Crime and antisocial behaviour

**Table 6c** provides data on crime, incidents and antisocial behaviour (ASB) for the period of July to December in 2017. The figures from the same period in 2016 are also provided for comparison.

The data collated covers the Local Community Planning Partnership Central and West area, which is an aggregation of the Council wards of Partick West, Hillhead and Anderston/City. This is the largest local CPP in the City by population size.

### DEFINITIONS

- ASB Incidents - Police Scotland incidents relating to complaints, disturbances, neighbour and noise complaints.
- Youth Disorder - the same as above but filtered to isolate youth related incidents by disposal code/qualifier and free text search for phrases indicating youth involvement.
- ASB Crime - data from the Police Scotland Corporate Database covering a variety of ASB type offences relating to disregard for community wellbeing (such as BOP, threatening or abusive behaviour, drunk and incapable behaviour etc.), environmental damage (such as littering, vandalism etc.), misuse of public space (such as street drinking, prostitution, and all Fixed Penalty Notices).
- Violent Crime - all Group 1 crime of violence and simple/common assaults taken from the Police Scotland Corporate Database.

**Table 6c: Crime/ASB indicators - Central & West neighbourhood**

KPI Type	July – December 2016	July – December 2017	+/-	% change
ASB Incidents	3623	3613	- 10	- 0.3%
Youth Disorder	217	261	+44	+20%
ASB Crime	3884	2327	- 1557	- 40%
Violent Crime	1061	994	- 67	- 6%



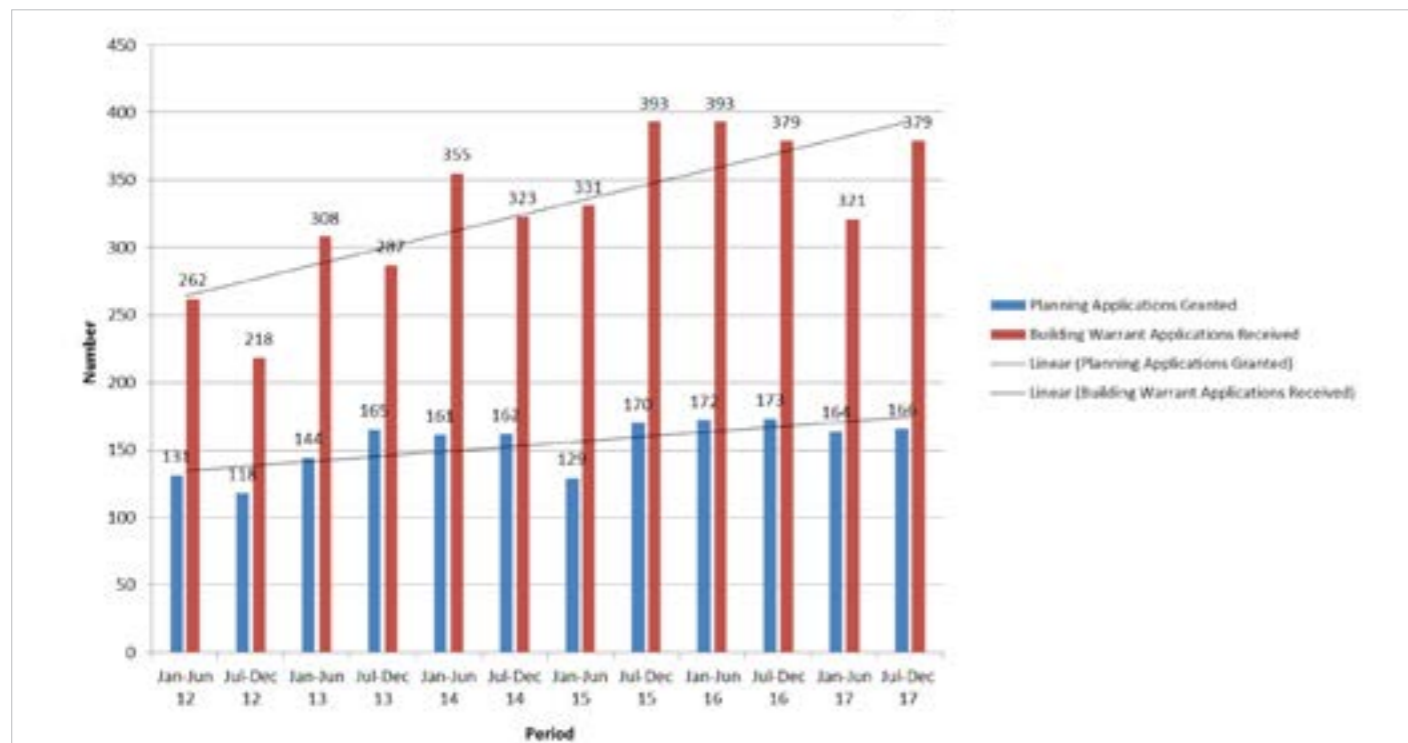
## 7. PLANNING AND DEVELOPMENT

### 7.1 Planning Applications and Building Warrant Applications

**Table 7a<sup>27</sup>** provides a comparison of both planning applications granted and building warrant applications received within Ward 10 (Anderston/City centre) against the periods January to June and July to December for years 2012 to 2017.

The number of planning applications granted for period July to December 2017 (against the same period in 2016) showed a decrease of 4.04%. The number of building warrant applications received showed no change.

**Table 7a:** Ward 10 Anderson/ City

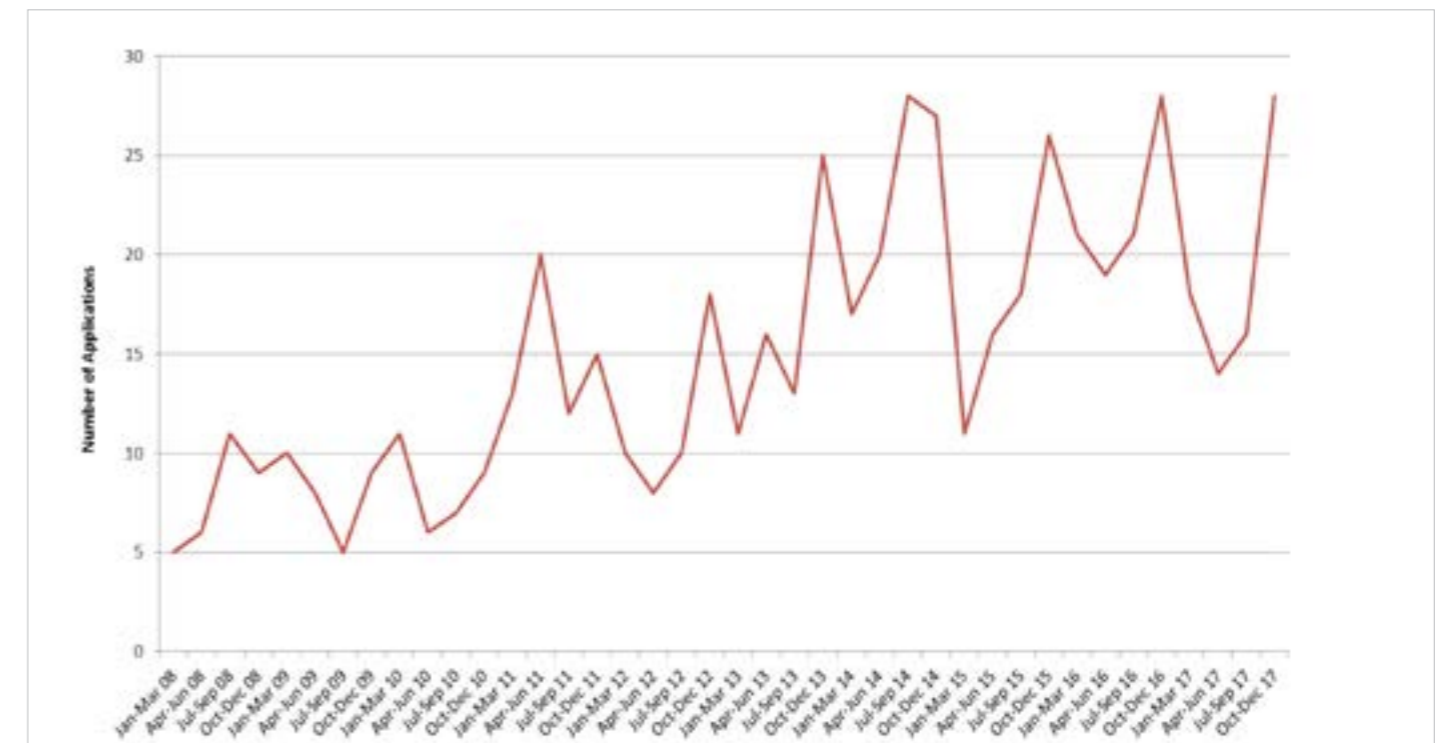


<sup>27</sup> GCC, March 2018

### 7.2 City Centre Retail Planning Applications

**Table 7b<sup>28</sup>** tracks the quarterly numbers of retail planning applications approved since January 2008 to December 2017 using monthly data collated by GCC. The figures collected from July to December 2017 represent a decrease of 10.20% on the figures recorded from July to December 2016.

**Table 7b:** City Centre: Retail Planning Applications 2008 - 2017



<sup>28</sup> Ibid

## 8. TOURISM

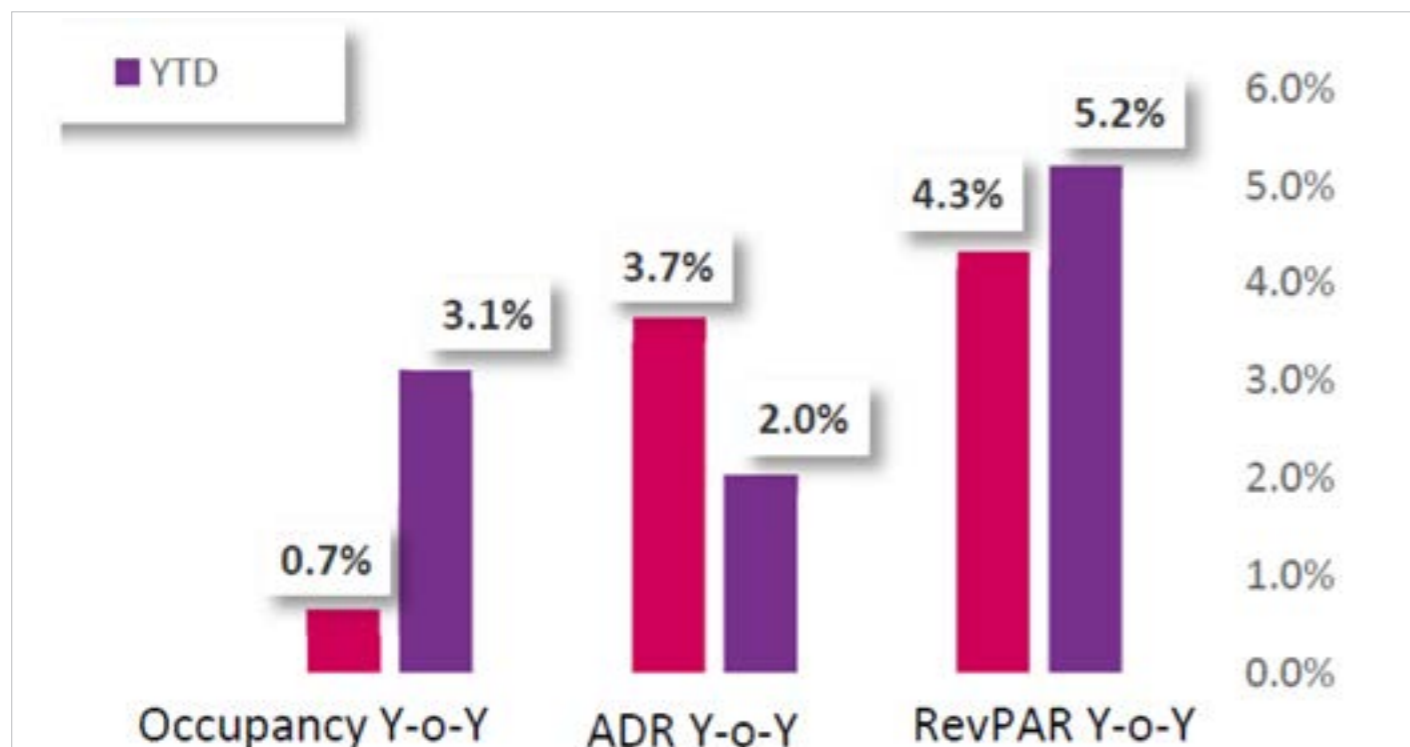
### 8.1 Glasgow Hotel Occupancy Rates

Since April 2017, STR has taken over from Lynn Jones Forecaster in providing hotel occupancy rates for the city. It should be noted that STR's new figures represent a larger suite of hotels so a direct comparison against previous years cannot be made. For this edition, hotel occupancy rates for period July-December 2017<sup>35</sup> are as follows:

Hotel Occupancy 2017	Jul	Aug	Sep	Oct	Nov	Dec
Occupancy	87.3%	93.6%	90.4%	85.8%	86.7%	69.8%
ADR	£75.05	£80.51	£78.74	£73.83	£75.90	£67.06
RevPar	£65.55	£75.33	£71.16	£63.39	£65.78	£46.80
Occupancy % difference compared to 2016	+1.0%	+3.5%	+3.4%	+2.8%	+4.6%	+0.7%

**Table 8b** shows both December and the Year to Date (YTD) figures for 2017. YTD Average Daily rate in Glasgow shown a 2.0% increase compared to 2016 while YTD Revenue per Available Room also increased by 5.2%. Room occupancy has increased 3.1%.

**Table 8b**



<sup>6</sup> BRC/ Springboard Footfall & Vacancies Monitor, February 2016

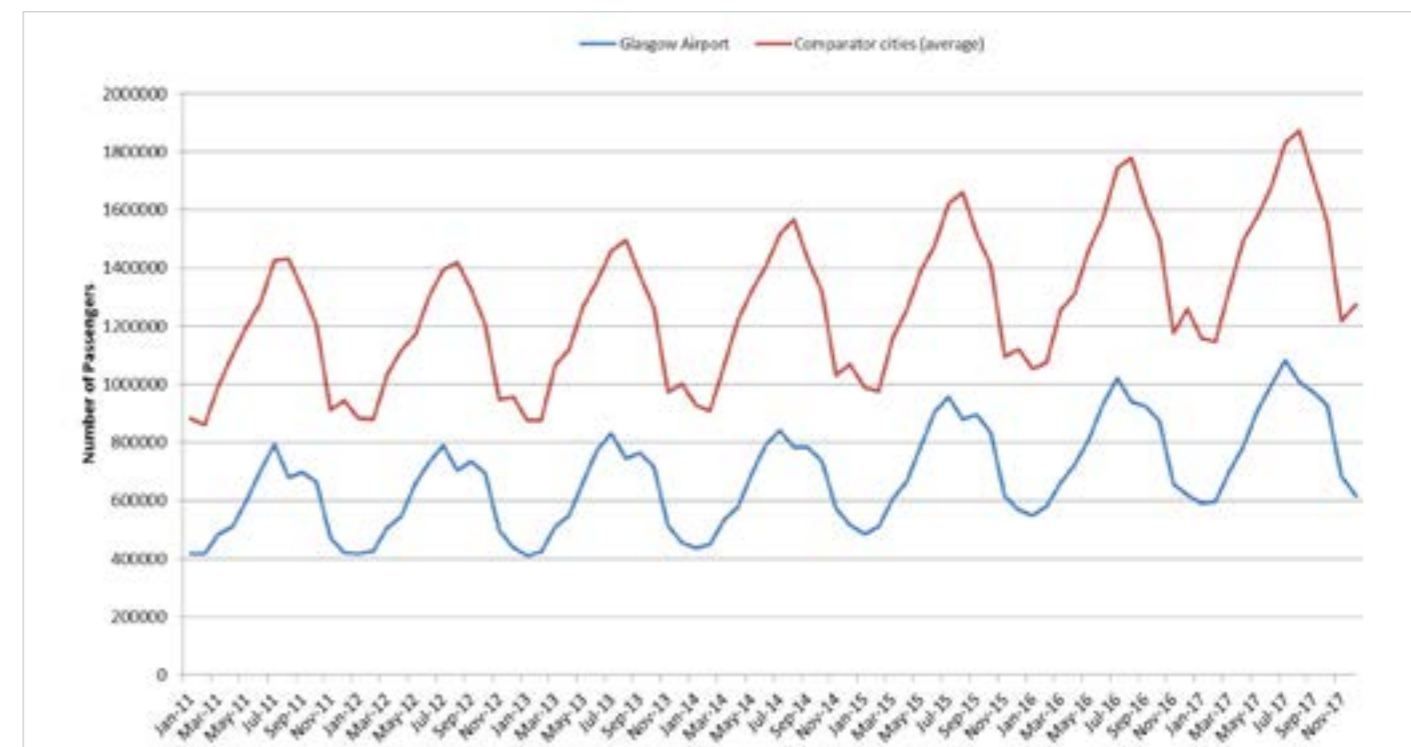
### 8.2 Glasgow International airport: Passenger Numbers

Glasgow International Airport operates 365 days a year, 24 hours a day and deals with approximately 9 million passengers a year, generating almost £200 million annually to the economy<sup>29</sup>. Further snapshot facts and figures on the airport can be accessed via the following link: <http://www.glasgowairport.com/about-us/facts-and-figures>

**Table 8d**<sup>31</sup> illustrates Glasgow Airport's total passenger numbers and how they compare to an average taken of other cities<sup>31</sup>. The figures cover the period January 2011 – December 2017 and relate to the number of terminal passengers recorded by the Civil Aviation Authority. Glasgow Airport and its comparators tend to demonstrate the same yearly trends.

Comparing the second half of 2017 against the same period in 2016, Glasgow Airport demonstrated a 5.05% increase in average monthly passenger numbers. The same period also showed Glasgow Airport performed better, on average, against comparator cities which showed an overall increase of 4.22%.

**Table 8d: Glasgow Airport Terminal Passenger Numbers**



<sup>29</sup> Glasgow Airport website accessed, February 2018

<sup>30</sup> CAA website accessed, February 2018

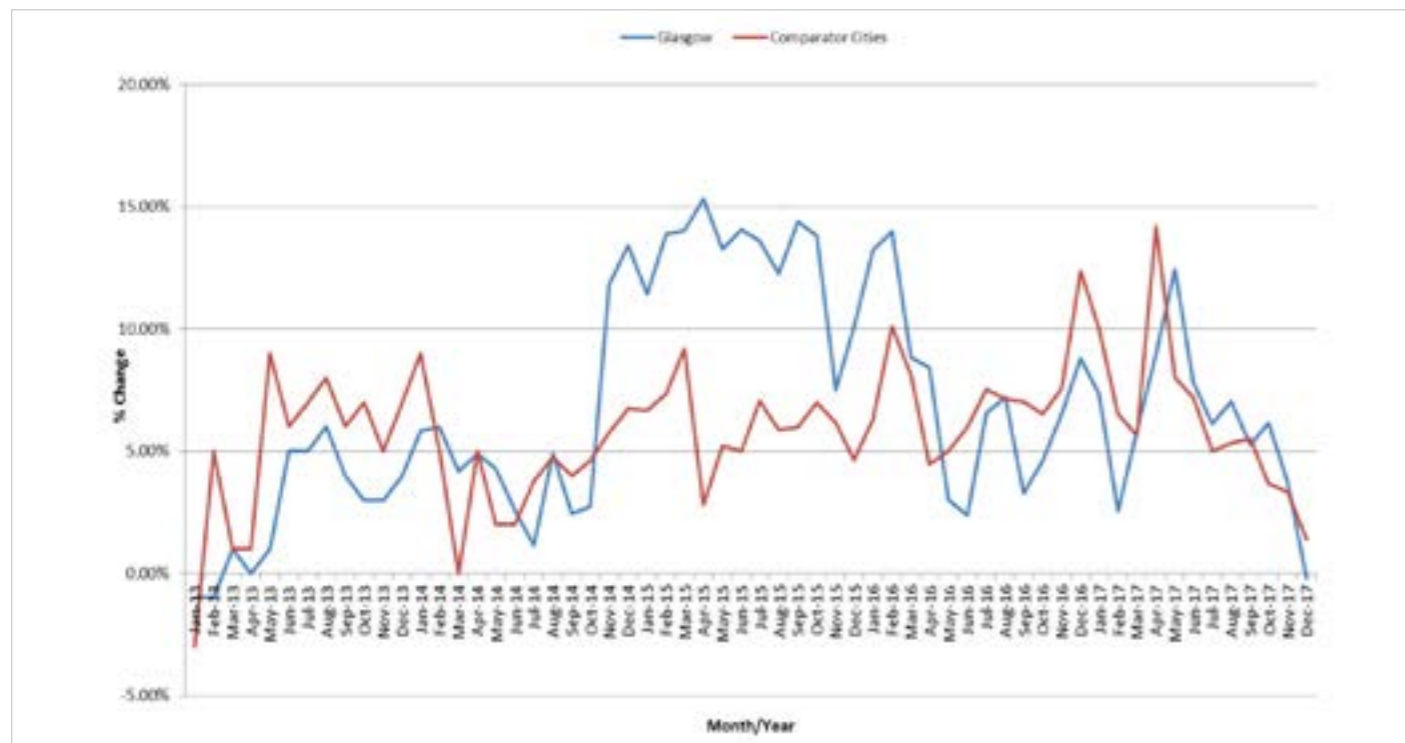
<sup>31</sup> Birmingham, Bristol, Cardiff, Edinburgh, Gatwick, Heathrow, Leeds, Liverpool, London City, London Luton, Manchester, Newcastle, Norwich and Stanstead, February 2018

## 8. TOURISM

### 8.2 Glasgow International airport: Passenger Numbers

**Table 8e**<sup>32</sup> shows the year-on-year percentage rate change in airport passenger numbers recorded at Glasgow Airport for each month. For comparison purposes, a similar calculation is made for the year-on-year percentage rate change in the average airport passenger numbers of the comparator cities. The graph shows that Glasgow performed better than the average passenger numbers for the previous period July-December 2017 (4.69% compared to 4.04%).

**Table 8e:** Annual Change in Airport Passenger Numbers



<sup>32</sup> Ibid

## 9. CITY CENTRE EXPERIENCE

### 9.1 City Centre Mural Trail

In 2014, the city centre mural trail was officially launched to promote the growing portfolio of works adorning buildings within Glasgow city centre. The murals showcase a diverse range of talent and styles and are now recognised as unique pieces of art in their own right. They have generated hugely positive public and business feedback while creating striking features that enhance the city centre environment.

**Table 9a** shows the number of city centre murals

Year	Total no. of city centre murals
2018	24

The mural trail app was launched in August 2017 and allows you to easily follow the trail using the online map. In addition, users can also experience the health benefits by measuring the distance walked while completing the mural trail as shown in **Table 9b**.

**Figure 9b:** Distance Walked (m)



## 9.2 AUTISM FRIENDLY GLASGOW CITY CENTRE

In April 2018, Glasgow launches its Autism Friendly city centre project and will see a variety of businesses and services, across the city, make their venue more autism aware.

An autism friendly city centre provides an opportunity for both council services and the business community to promote the city centre as an inclusive, family friendly location whilst helping create a city where there is fairness, diversity and equality for all.

A wide range of organisations including shopping centres, transport hubs and museums etc. will introduce quiet rooms, quiet hours, pre visit information, sensory bags and train staff in a bid to become autism friendly.

Year	Number of Autism venues
2018	19

## 9.3 CHILD SAFE

The city centre's Child Safe Zone initiative uses a variety of measures to reunite lost children with their families, with posters displayed around the city centre showing a helpline number which connects directly to the Glasgow Community Services Operations Centre. In the event that a child becomes separated from their parent/guardian, the security team will immediately implement their search procedures.

In addition, visitors can write their mobile phone number onto a free, colourful wristband which is then secured around their child's wrist, so that anyone finding a lost child can quickly contact them to let them know that their child is safe. The wristbands are available at key locations in the city centre.

A full list of these locations can be found at <http://www.glasgow.gov.uk/childsafezone>

**Figure 9b: Distance Walked (m)**

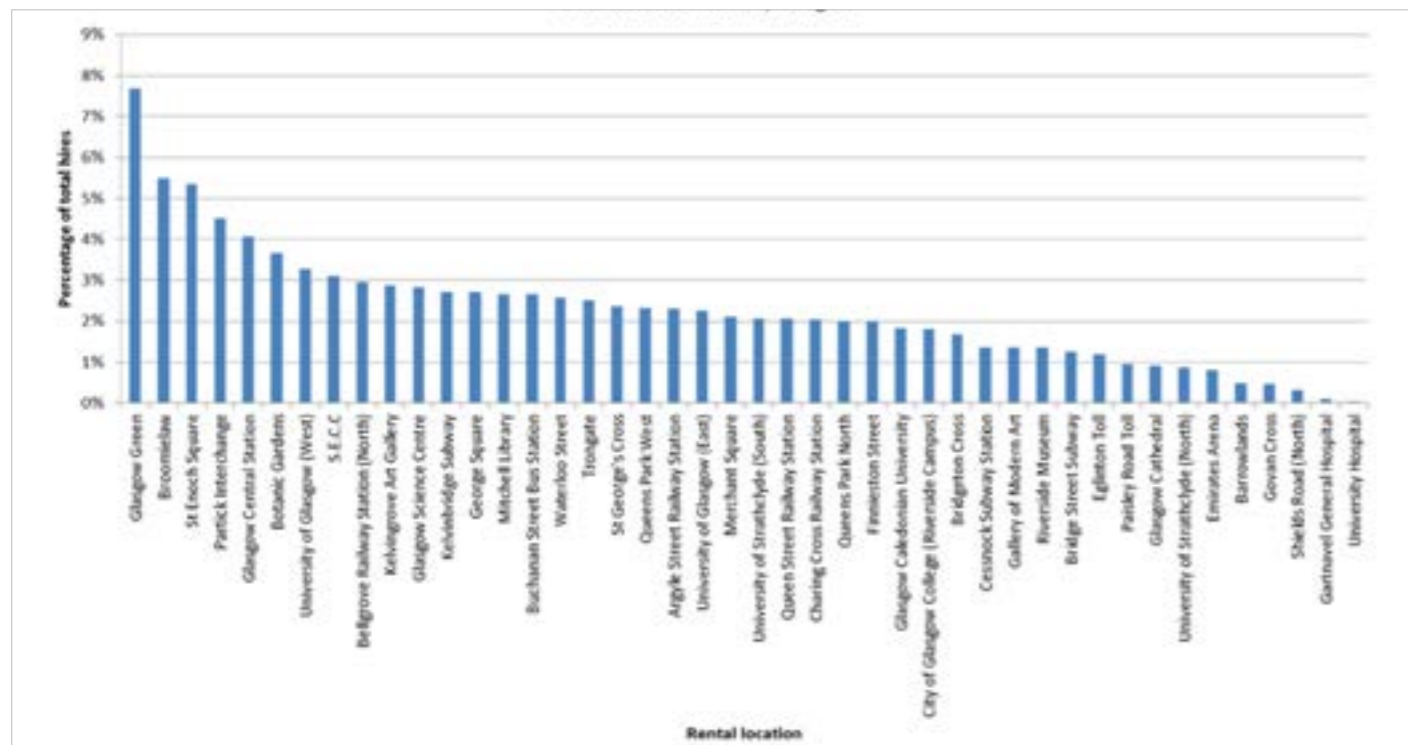
Year	Number of Child Safe venues
2018	12

### 9.4 NEXT BIKE HIRE SCHEME

A public cycle hire scheme was introduced in Glasgow on June 24th 2014. The concept for provision of the scheme for three years was awarded to Next Bike ([www.nextbike.co.uk](http://www.nextbike.co.uk)) which runs similar schemes in cities across the world. In February 2017, an expansion to the scheme was agreed and the number hire stations have increased to 100 and the number of bikes to 900.

The most popular rental location as show in **Figure 9c** is Glasgow Green (7.6% of all hires), followed by the Broomielaw (5.6%) and St Enoch Square (5.3%)

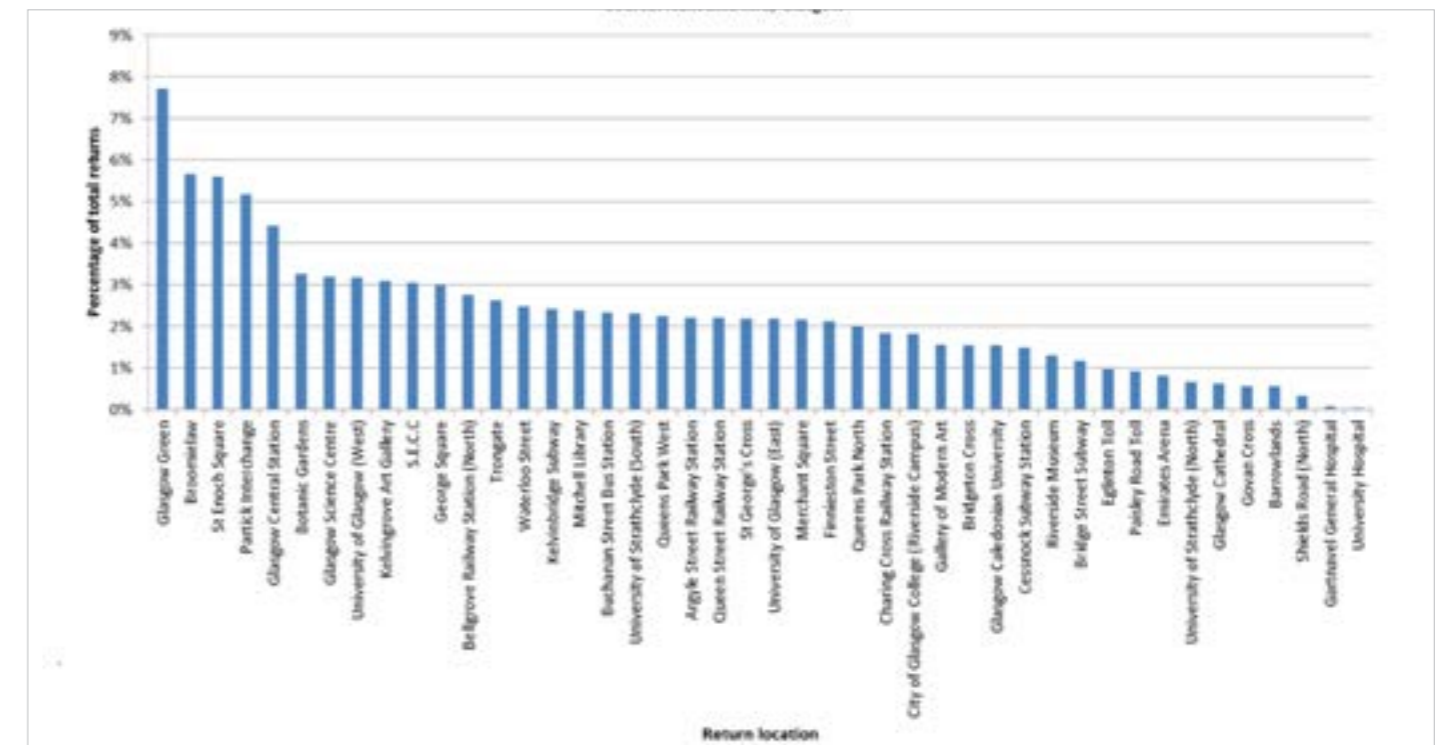
**Figure 9c:** Percentage of total hires for each location, July 2014 to June 2016  
Source: Next bike hire, Glasgow



### 7.2 City Centre Retail Planning Applications

The most popular return locations are similar to the rental locations, namely Glasgow Green (7.7%) and Broomielaw (5.6%)<sup>20</sup> as shown in **Figure 9d**.

**Figure 9d:** Percentage of total returns for each location, July 2014 to June 2016  
Source: Next bike hire, Glasgow



## 10. GLASGOW NEWS ROUND-UP

### Web links

**The rise of Glasgow as a creative Industry hub, Oct 6 2017**

<https://www.studyinternational.com/news/rise-glasgow-creative-industry-hub/#VacDgoW6GDQobWBT.97>

**Commercial waste bins to be cleared in Glasgow, Oct 7 2017**

[http://www.eveningtimes.co.uk/news/15581433.Commercial\\_waste\\_bins\\_to\\_be\\_cleared\\_in\\_Glasgow/](http://www.eveningtimes.co.uk/news/15581433.Commercial_waste_bins_to_be_cleared_in_Glasgow/)

**Glasgow wins race to set up first Low Emission Zone in Scotland, Oct 10 2017**

[http://www.eveningtimes.co.uk/news/15585746.Glasgow\\_wins\\_race\\_to\\_set\\_up\\_first\\_Low\\_Emission\\_Zone\\_in\\_Scotland/](http://www.eveningtimes.co.uk/news/15585746.Glasgow_wins_race_to_set_up_first_Low_Emission_Zone_in_Scotland/)

**£250m regeneration of Sighthill moves forward with plans for more than 800 homes, Oct 13 2017**

<http://www.glasgowlive.co.uk/news/glasgow-news/250m-regeneration-sighthill-moves-forward-13754781>

**Malone's and Waxy O'Connor's triumph in Irish bar awards, Oct 12 2017**

<http://barmagazine.co.uk/malones-waxy-oconnors-triumph-irish-bar-awards/>

**Council scheme clears Glasgow lanes for regeneration, Oct 13 2017**

<http://www.glasgowist.com/council-scheme-clears-glasgow-lanes-for-regeneration/>

**TRNSMT Festival nominated for three awards in the UK Festival Awards 2017, Oct 14 2017**

<https://www.thescottishsun.co.uk/tvandshowbiz/1699768/trsnmt-carnival-fifty-six-belladrum-tartan-heart-festival-electric-fields/>

**Vital community projects in Glasgow scoop over £100k boost, Oct 17 2017**

<http://www.glasgowlive.co.uk/news/glasgow-news/vital-community-projects-glasgow-scoop-13772014>

**Tam Shepherds Trick Shop crowned Glasgow's favourite business, Oct 16 2017**

[http://www.eveningtimes.co.uk/news/15598056.Tam\\_Shepherds\\_Trick\\_Shop\\_crowned\\_Glasgow\\_s\\_favourite\\_business/](http://www.eveningtimes.co.uk/news/15598056.Tam_Shepherds_Trick_Shop_crowned_Glasgow_s_favourite_business/)

**Glasgow landmarks transformed for visual sonic arts festival, Oct 20 2017**

[http://www.eveningtimes.co.uk/news/15607386.Glasgow\\_landmarks\\_transformed\\_for\\_visual\\_sonic\\_art\\_festival/](http://www.eveningtimes.co.uk/news/15607386.Glasgow_landmarks_transformed_for_visual_sonic_art_festival/)

**Glasgow Club Bellahouston celebrates 50 years in the community, Oct 21 2017**

[http://www.eveningtimes.co.uk/news/15610400.Glasgow\\_Club\\_Bellahouston\\_celebrates\\_50\\_years\\_in\\_the\\_community/](http://www.eveningtimes.co.uk/news/15610400.Glasgow_Club_Bellahouston_celebrates_50_years_in_the_community/)

**Baby's First Christmas: Date announced for registering tots for hugely popular Glasgow tradition, Oct 30 2017**

[http://www.eveningtimes.co.uk/news/15618512.Date\\_announced\\_for\\_registering\\_tots\\_for\\_hugely\\_popular\\_Baby\\_s\\_First\\_Christmas/](http://www.eveningtimes.co.uk/news/15618512.Date_announced_for_registering_tots_for_hugely_popular_Baby_s_First_Christmas/)

**Record numbers request tickets for Glasgow's Christmas Lights Switch-On, Oct 30 2017**

<http://www.glasgowlive.co.uk/news/glasgow-news/record-numbers-request-tickets-glasgows-13828948>

**Benedict Cumberbatch spotted filming in Glasgow as city centre is done up to look like New York, Oct 30 2017**

<http://www.dailyrecord.co.uk/news/scottish-news/benedict-cumberbatch-spotted-filming-glasgow-11429755>

**Lord Provost opens Glasgow Garden of Remembrance with poignant service, Nov 1 2017**

[http://www.heraldsotland.com/news/15630903.In\\_pictures\\_\\_Lord\\_Provost\\_opens\\_Glasgow\\_Garden\\_of\\_Remembrance\\_with\\_poignant\\_service/](http://www.heraldsotland.com/news/15630903.In_pictures__Lord_Provost_opens_Glasgow_Garden_of_Remembrance_with_poignant_service/)

**Glasgow community projects awarded over £4m, Nov 2 2017**

<http://www.bqlive.co.uk/scotland/2017/11/02/news/glasgow-community-projects-awarded-over-4m-28702/>

**Holidays are coming: Coca-Cola truck to stop in two Glasgow locations, Nov 1 2017**

[http://www.peebleshirenews.com/news/trendingacrossscotland/15633421.Holidays\\_are\\_coming\\_\\_Coca\\_Cola\\_truck\\_to\\_stop\\_in\\_two\\_Glasgow\\_locations/](http://www.peebleshirenews.com/news/trendingacrossscotland/15633421.Holidays_are_coming__Coca_Cola_truck_to_stop_in_two_Glasgow_locations/)

**Glasgow Green's fireworks extravaganza goes off with a bang, Nov 5 2017**

[http://www.eveningtimes.co.uk/news/15642234.Glasgow\\_Green\\_\\_39\\_s\\_fireworks\\_extravaganza\\_goes\\_off\\_with\\_a\\_bang/](http://www.eveningtimes.co.uk/news/15642234.Glasgow_Green__39_s_fireworks_extravaganza_goes_off_with_a_bang/)

**Glasgow community Champions: Big night set to celebrate true city heroes, Nov 8 2017**

[http://www.eveningtimes.co.uk/news/15645261.Glasgow\\_Community\\_Champions\\_\\_Big\\_night\\_set\\_to\\_celebrate\\_true\\_city\\_heroes/](http://www.eveningtimes.co.uk/news/15645261.Glasgow_Community_Champions__Big_night_set_to_celebrate_true_city_heroes/)

**Glasgow becomes a world-leading smart city, Nov 7 2017**

<https://smartcitiesworld.net/news/news/glasgow-becomes-a-world-leading-smart-city-2276>

**Here's how you can have non-stop festive fun in Glasgow this Christmas, Nov 7 2017**

<http://www.glasgowlive.co.uk/news/glasgow-news/heres-how-you-can-non-13871580>

**Hypermarket Christmas special to showcase Glasgow's top traders at SWG3, Nov 7 2017**

<http://www.glasgowlive.co.uk/whats-on/hypermarket-christmas-special-showcase-glasgows-13870671>

**The Ivy confirms plans for spring 2018 opening in Glasgow, Nov 8 2017**

<http://www.glasgowist.com/the-ivy-confirm-plans-for-spring-2018-opening-in-glasgow/>

**Early festive cheer as Christmas market opens in Glasgow, Nov 9 2017**

<https://stv.tv/news/features/1401840-early-festive-cheer-for-glasgow-as-christmas-market-opens/>

**Glasgow office investment set for best ever year, Nov 8 2017**

<http://www.bqlive.co.uk/scotland/2017/11/08/news/glasgow-office-investment-set-for-best-ever-year-28798/>

**Glasgow city centre set for biggest revamp in a generation, Nov 9 2017**

<http://www.glasgowlive.co.uk/news/glasgow-news/biggest-revamp-in-a-generation-13881650>

**Into Film Festival 2017: World's biggest youth event takes over Glasgow Nov 10 2017**

[http://www.eveningtimes.co.uk/news/15652328.Scotland\\_\\_39\\_s\\_biggest\\_film\\_festival\\_takes\\_over\\_Glasgow/](http://www.eveningtimes.co.uk/news/15652328.Scotland__39_s_biggest_film_festival_takes_over_Glasgow/)

**Online fashion brand Monki launches first Scottish store in Glasgow next week, Nov 10 2017**

<http://www.glasgowlive.co.uk/whats-on/shopping/fashion-monki-launches-buchanan-galleries-13885200>

**St Enoch Centre to hold 'quiet sessions' at Santa's Grotto for children with autism, Nov 16 2017**

<http://www.glasgowlive.co.uk/whats-on/family-kids-news/st-enoch-centre-hold-quiet-13890112>

**Taco Bell to open first Scottish restaurant next month, Nov 13 2017**

<https://stv.tv/news/west-central/1402131-taco-bell-to-open-first-scottish-restaurant-next-month/>

**Glasgow's Citizens Theatre's £20.5m revamp takes major step forward, Nov 14 2017**

<http://www.glasgowlive.co.uk/news/glasgow-news/revamp-takes-major-step-forward-13898104?service=responsive>

**Glasgow to open Scotland's first Olympic-standard BMX bike track, Nov 15 2017**

<http://www.scotsman.com/future-scotland/tech/glasgow-to-open-scotland-s-first-olympic-standard-bmx-bike-track-1-4614471>

**Glasgow wins big at global tourism awards, Nov 18 2017**

<http://www.glasgowlive.co.uk/news/glasgow-news/glasgow-wins-big-global-tourism-13918540>

**Glasgow hailed as one of world's leading cities for sustainable business tourism, Nov 17 2017**

<http://www.insider.co.uk/news/glasgow-hailed-one-worlds-leading-11537928>

**Glasgow Convention Bureau wins "Best Improved Destination" award and climbs to 4th place on Global Destination Sustainability Index Rankings, Nov 17 2017**

<https://www.incentivetravel.co.uk/news/agency-news/42398-glasgow-convention-bureau-wins-best-improved-destination-award-and-climbs-to-4th-place-on-global-destination-sustainability-index-rankings>

**Glasgow's best small businesses to feature at 'Barras in the city' Christmas market, Nov 17 2017**

<http://www.glasgowlive.co.uk/whats-on/shopping/glasgows-best-small-businesses-feature-13919172>

**Watch as thousands gather in George Square for Christmas light switch-on, Nov 19 2017**

<http://www.glasgowlive.co.uk/whats-on/whats-on-news/watch-thousands-gather-george-square-13924637>

**Glasgow warms up for annual Style Mile Carnival – Here's everything you need to know, Nov 22 2017**

<http://www.glasgowlive.co.uk/whats-on/family-kids-news/glasgow-gets-warmed-up-annual-13935473>

**Massive improvement plan for Glasgow's Barras Market takes major leap forward, Nov 21 2017**

<http://www.glasgowlive.co.uk/news/glasgow-news/massive-improvement-plan-glasgows-barras-13932823>

**Glasgow among world's top five cities for sustainable growth in meetings and events, Nov 21 2017**

<https://www.citmagazine.com/article/1450764/glasgow-among-worlds-top-five-cities-sustainable-growth-meetings-events>

**10,000 volunteers apply to be part of Glasgow 2018, Nov 21 2017**

<http://www.bbc.co.uk/news/uk-scotland-glasgow-west-42064812>

**Kelvingrove Park to host new two-day music festival in 2018, Nov 23 2017**

<http://www.glasgowlive.co.uk/whats-on/music-nightlife-news/kelvingrove-park-host-new-two-13945390>

**Glasgow bookworms tuck into literary feast to celebrate Book Week Scotland, Nov 27 2017**

<http://www.glasgowlive.co.uk/whats-on/family-kids-news/glasgow-bookworms-tuck-literary-feast-13958401>

**Take a first look at Dockyard Social, Glasgow's new permanent street food market, Nov 30 2017**

[http://www.eveningtimes.co.uk/news/15694124.Scotland\\_\\_\\_s\\_music\\_royalty\\_to\\_descend\\_on\\_Glasgow\\_for\\_glitzy\\_awards\\_bash/](http://www.eveningtimes.co.uk/news/15694124.Scotland___s_music_royalty_to_descend_on_Glasgow_for_glitzy_awards_bash/)

**Scottish Music Awards draw out industry royalty for glitzy Glasgow bash, Nov 30 2017**

[www.fifetoday.co.uk/whats-on/scottish-music-awards-return-to-glasgow-1-4550294](http://www.fifetoday.co.uk/whats-on/scottish-music-awards-return-to-glasgow-1-4550294)

**Glasgow 2018 European Championships: Eclectic festival programme unveiled, Dec 1 2017**

[http://www.eveningtimes.co.uk/news/15694962.Eclectic\\_festival\\_programme\\_unveiled\\_for\\_Glasgow\\_2018\\_European\\_Championships/](http://www.eveningtimes.co.uk/news/15694962.Eclectic_festival_programme_unveiled_for_Glasgow_2018_European_Championships/)

**Glasgow launches Christmas safety campaign – here's what you need to know, Nov 30 2017**

<http://www.glasgowlive.co.uk/news/glasgow-news/police-fire-scotland-safety-christmas-13976290>

**TRNSMT Festival wings gong at UK Festival Awards, Dec 1 2017**

[http://www.eveningtimes.co.uk/news/15697043.New\\_Glasgow\\_event\\_Trnsmt\\_wins\\_gong\\_at\\_UK\\_Festival\\_Awards/](http://www.eveningtimes.co.uk/news/15697043.New_Glasgow_event_Trnsmt_wins_gong_at_UK_Festival_Awards/)

**Thousands of Santa's turn Glasgow red and white, Dec 10 2017**

<http://www.bbc.co.uk/news/uk-scotland-glasgow-west-42294411>

**Glasgow school is the first secondary to be named "digital school" in UK, Dec 11 2017**

<http://www.glasgowlive.co.uk/news/glasgow-news/glasgow-school-first-secondary-named-14021623>

**Year long programme of events launched to celebrate 150th anniversary of birth of Charles Rennie Mackintosh, Dec 14 2017**

<http://www.glasgowist.com/year-long-programme-of-events-launched-to-celebrate-150th-anniversary-of-birth-of-charles-rennie-mackintosh/>

**Glasgow to host first Welcome Football festival to encourage city integration, Dec 18 2017**

<http://www.glasgowlive.co.uk/sport/football/glasgow-host-first-welcome-football-14049659>

**Scottish shoppers spent more than £100million on super Saturday after quarter of the population hunted for last-minute Christmas gifts, Dec 24 2017**

<http://www.dailyrecord.co.uk/news/scottish-news/scotland-set-first-1-billion-christmas-11746983>

**Glasgow primary school wins £10,000 to build outdoor sensory garden, Dec 22 2017**

<http://www.glasgowlive.co.uk/news/glasgow-news/glasgow-primary-school-wins-10000-14070445>

**Work begins on £7.2m Sauchiehall Street "Avenue" project, Jan 9 2018**

<http://www.glasgowlive.co.uk/news/glasgow-news/work-begins-72m-sauchiehall-street-14129481>

**Stars set for Glasgow International Comedy Festival, Jan 10 2018**

<http://www.bbc.co.uk/news/uk-scotland-glasgow-west-42626645>

**Popular Glasgow book festival set to return with hundreds of events across city, Jan 10 2018**

[http://www.eveningtimes.co.uk/news/15822182.Popular\\_Glasgow\\_book\\_festival\\_set\\_to\\_return\\_with\\_hundreds\\_of\\_events\\_across\\_city/](http://www.eveningtimes.co.uk/news/15822182.Popular_Glasgow_book_festival_set_to_return_with_hundreds_of_events_across_city/)

**Iconic London restaurant The Ivy granted planning permission for Glasgow venue, Jan 12 2018**

<http://www.glasgowlive.co.uk/news/glasgow-news/iconic-london-restaurant-ivy-granted-14149821>

**Brand new Glasgow University research hub given green light, Jan 13 2018**

[http://www.thenational.scot/news/15825860.Glasgow\\_University\\_research\\_hub\\_reaches\\_milestone/](http://www.thenational.scot/news/15825860.Glasgow_University_research_hub_reaches_milestone/)



**Glasgow's office market successful in 2017, Jan 19 2018**

[http://www.thenational.scot/news/15876462.Glasgow\\_\\_39\\_s\\_office\\_market\\_successful\\_in\\_2017/](http://www.thenational.scot/news/15876462.Glasgow__39_s_office_market_successful_in_2017/)

**Work to begin on new VisitScotland Centre on Glasgow's Buchanan Street, Jan 30 2018**

[http://www.eveningtimes.co.uk/news/15905870.Work\\_set\\_to\\_begin\\_on\\_new\\_high\\_tech\\_tourism\\_hub\\_in\\_Buchanan\\_Street/](http://www.eveningtimes.co.uk/news/15905870.Work_set_to_begin_on_new_high_tech_tourism_hub_in_Buchanan_Street/)

**St Enoch Centre launches quiet room for autistic people, Jan 30 2018**

[http://www.heraldscotland.com/news/homenews/15906178.In\\_pictures\\_\\_Glasgow\\_shopping\\_centre\\_launches\\_quiet\\_room\\_for\\_autistic\\_people/](http://www.heraldscotland.com/news/homenews/15906178.In_pictures__Glasgow_shopping_centre_launches_quiet_room_for_autistic_people/)

**Record attendance for Glasgow's Celtic Connections, Feb 5 2018**

<http://www.bbc.co.uk/news/uk-scotland-glasgow-west-42944083>

**Record number of visitors visit Scottish tourist attractions, Feb 7 2018**

[http://www.heraldscotland.com/news/15923552.Plummeting\\_pound\\_helps\\_Scottish\\_tourism\\_to\\_hit\\_record\\_numbers/](http://www.heraldscotland.com/news/15923552.Plummeting_pound_helps_Scottish_tourism_to_hit_record_numbers/)

**Film and TV production makes £15m for Glasgow's economy, Feb 8 2018**

[http://www.thenational.scot/news/15961321.Film\\_and\\_TV\\_production\\_makes\\_\\_15m\\_for\\_Glasgow\\_\\_39\\_s\\_economy/](http://www.thenational.scot/news/15961321.Film_and_TV_production_makes__15m_for_Glasgow__39_s_economy/)

**Queen lends Leonardo da Vinci works to Glasgow museum, Feb 7 2018**

<http://www.bbc.co.uk/news/uk-scotland-glasgow-west-42980217>

**Glasgow Coffee Festival returns for 2018, Feb 8 2018**

<https://www.glasgowlive.co.uk/whats-on/glasgow-coffee-festival-returns-for-14262530>

**Merchant City venue to host vegan pop-up market this month, Feb 9 2018**

<https://www.glasgowlive.co.uk/whats-on/food-drink-news/merchant-city-venue-host-vegan-14265818>

**Glasgow wins bid to host UKinbound's 2019 Annual Convention, Feb 10 2018**

<https://sbnn.co.uk/2018/02/10/glasgow-wins-bid-host-ukinbounds-2019-annual-convention/>

**Glasgow celebrates start of Chinese New Year in style, Feb 16 2018**

<https://www.glasgowlive.co.uk/news/glasgow-news/glasgow-celebrates-start-chinese-new-14296779>

**Glasgow Film Festival to kick off with star-studded line-up, Feb 20 2018**

<https://stv.tv/news/entertainment/1408635-glasgow-film-festival-launches-with-hollywood-stars/>

**Scotland's style awards set to return to Glasgow, Feb 25 2018**

<https://www.scotsman.com/news/celebrity/scotland-s-style-awards-set-to-return-to-glasgow-1-4696203>

## 11. MAILING LIST AND SURVEY

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