GLASGOW CITY CENTRE ECONOMIC HEALTH CHECK

Welcome to the September 2012 and eighth edition of Glasgow city centre's Economic Health Check: a progress report on how the city centre is performing on a range of indicators. This edition, produced by the City Centre Projects Team within Development and Regeneration Services, covers the period January – June 2012
Please note this is the first edition of the Health Check which covers data on a bi-annual basis. Editions will be published March and September each year.

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 at-a-glance colour coded trend indicators. As the frequency and period covered by each Health Check has changed in this edition, the majority are annual trends however future editions will also provide bi-annual trends.

Colour codes as follows: 🟢 - signifies improvement 🟡 - relative stability 🔴 - decline

Indicator	Trend	Comment
Footfall	🟢	Average increase of 5.5% across all counters for same period last year
Vacant units	🟢	3.5% decrease in vacancy rate comparing first five months in 2011 and 2012
Cleanliness	🟢	KSB cleanliness scores remain stable and performance by GCSS on sample of performance indicators has increased.
Crime	🟢	Comparing January to June 2012 with July to December 2011 there has been an average 12.7% decrease
Planning & Development	🔴	Average decrease in applications/warrants 11.9% on last year
Tourism	🟢	2.3% increase between January to June 2011 to 2012

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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, retail guide and iphone app, (which provides up to the minute details on current promotional offers) can all be downloaded by visiting www.glasgowstylemile.com .

The Style Mile is a public private partnership initiative to promote, protect and enhance Glasgow's city centre retail offering and capitalise on the city's ranking as the UK's top retail destination outside London's West End.

CACI's Retail Footprint 2011[1], which monitors by comparison spend, shows the top ten rankings based on retail forecast expenditure (£m). Their findings continue to show Glasgow remaining in 2nd place.

1. London - West End	£3,270	6. Nottingham	£1,730
2. Glasgow	£2,480	7. Leeds	£1,490
3. Birmingham	£2,430	8. Westfield London	£1,460
4. Manchester	£2,340	9. Newcastle Upon Tyne	£1,240
5. Liverpool	£1,790	10. Norwich	£1,180

CACI's research also ranks Glasgow 8th in the Top 10 Resilient Centres[2]

1. London - King's Road	6. Edinburgh (city centre)
2. London - Knightsbridge	7. Brighton (city centre)
3. London - Covent Garden	8. Glasgow (city centre)
4. London - West End	9. Aberdeen (city centre)
5. Westfield London	10. Oxford (city centre)

[1] CACI Press Release 16 June 2011
[2] Source: British Marketing Survey 2011

1. FOOTFALL

1.1 Style Mile Footfall

The Style Mile footfall monitor is based on Springboard's Customer Counting and Measurement system which registers foot flow at designated counters located throughout the Style Mile. These four counters are located at:

Buchanan Street at Galleries (original)
Buchanan Street at Lush
Argyle Street at Debenhams
Sauchiehall Street at Marks and Spencer

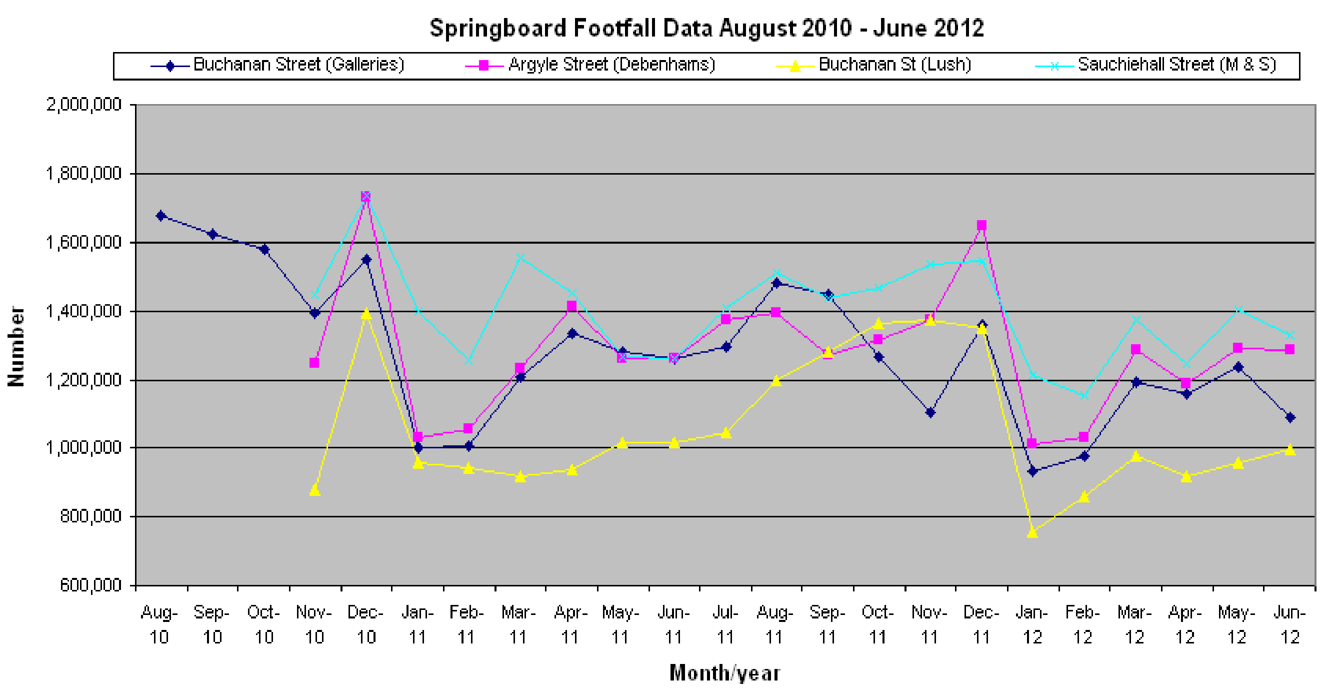
Table 1a[3] below shows data collated from these counters from August 2010 – June 2012. Please note however that the additional counters did not become operational until November 2010.

Springboard counters record foot flow over each 24 hour period, therefore registering both day and night time economy. According to the chart below, all counters record peaks in December. This is always a busy period attributed to festive shopping and entertainment activity at this time of year. As Sauchiehall Street comprises the most pubs, clubs and theatres in the city centre, it produces the highest foot flow trend-line.

All counter locations experience a drop in footfall in January and February – this is anticipated as people recover from additional spending during Christmas and New Year.

The foot flow in the city centre has been affected by a wet Spring/Summer in 2012 - comparing the totals of all counters in quarter 1 for 2011 and 2012, there has been a 4.4% decrease in footfall, though this is less than the decrease across Scotland[4] (8.2%) and UK town centres[5] (5.5%) for the same period. However, Argyle Street, Buchanan Street (Lush) and Sauchiehall Street figures in June 2012 are similar to those of June 2011 while across the UK since June 2011 there has been a 5.5% fall in foot flow[6].

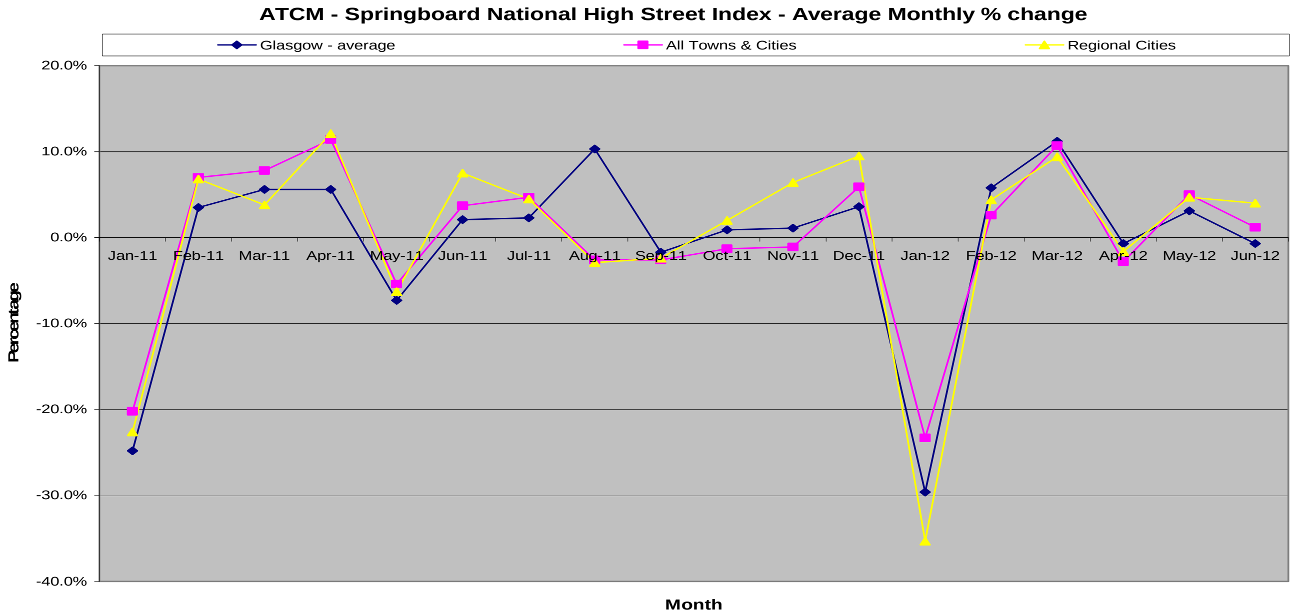
Table 1a



[3] Springboard, August 2012
[4] SRC August 2012
[5] *Ibid*
[6] ATCM Springboard National High Street Index Commentary, June 2012

Table 1b[7] shows Glasgow's average monthly percentage change against regional cities and all towns and cities from January 2011 – June 2012. Glasgow has generally followed the trends of its comparators, except for a substantial peak in August 2011 which coincided with the end of the school holiday period. As expected, all cities experience the anticipated trends around the festive season.

Table 1b

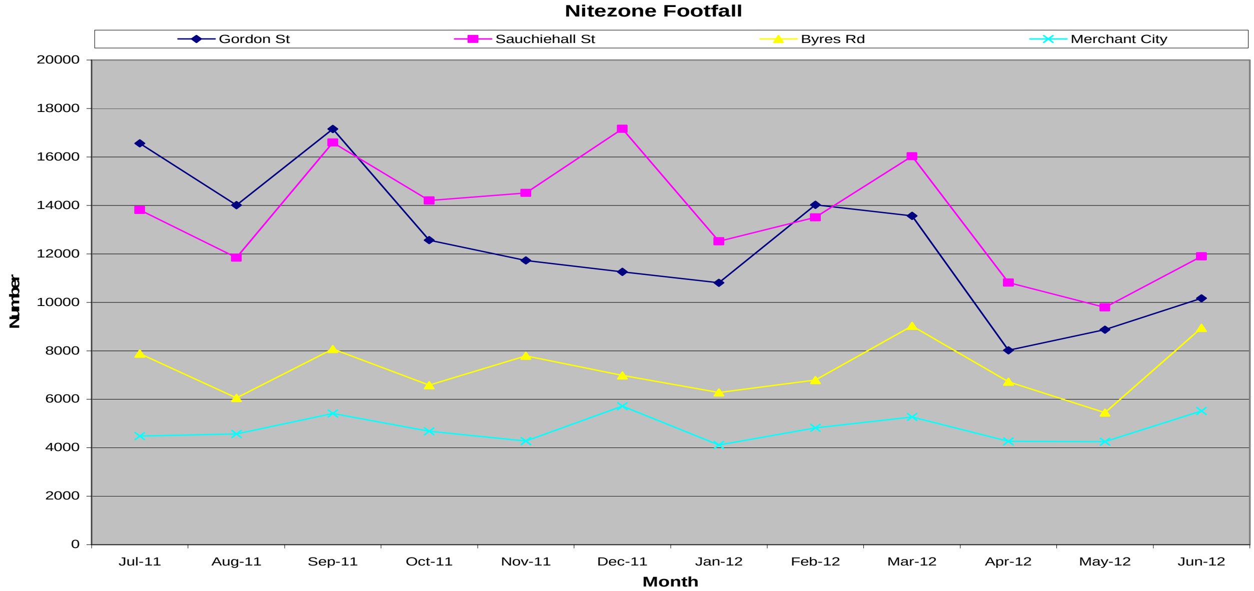


1.2 Nitezone footfall

Table 1c[8] illustrates comparative Nitezone footfall figures from July 2011 – June 2012. The figures, relating to Gordon Street, Sauchiehall Street, Byres Road and Merchant City, are collated by taxi marshals who are present at the designated taxi pick up points between 10pm and 5am every Friday and Saturday night, to ensure the efficient, safe exit out of the city for users of the night time economy (map showing pick up points is available via http://www.glasgow.gov.uk/en/Business/CityCentre/). Merchant City is the latest location to be added to the scheme and, as a peripheral city centre spot, records the lowest footfall. Please note as this is a weekend service only, some months include four counts in the month while others have five.

[7] ATCM Springboard National High Street Index – Glasgow – Average – June 2012
[8] GCSS August 2012

Table 1c



1.3 ATCM Night Time Economy Index Reports

ATCM-Springboard collates the Night Time Economy Index[9] which focuses on the UK's high street footfall during the hours of 6pm – 4am. Average statistics for footfall during night time hours in June 2012 showed an annual decrease across the UK's high streets of 6.9% from the previous June[10].

Table 1d

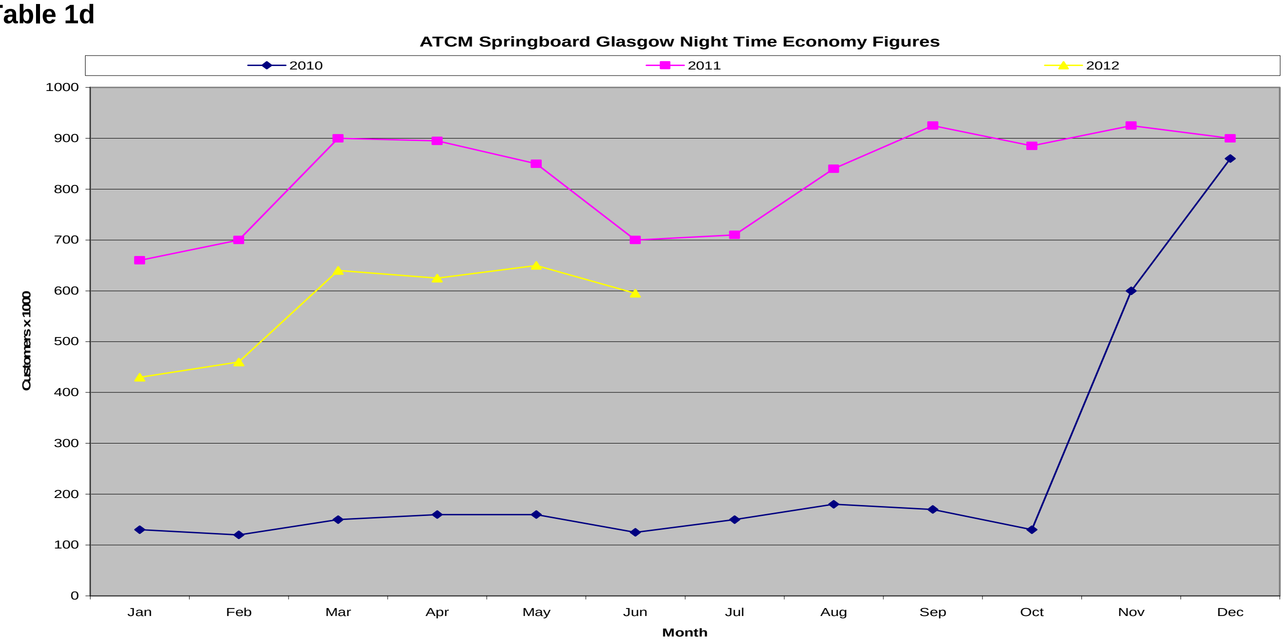


Table 1d[11] shows the last 3 years Night Time Economy figures for Glasgow up to end of June 2012. Please note the counters at Buchanan Street (Lush), Argyle Street and Sauchiehall Street did not become operational until

[9] ATCM Springboard Night Time Economy Index – June 2012
[10] *Ibid*
[11] Springboard, August 2012

November 2010 so data from January – October 2010 shows the original Buchanan Street data only. As with the 24 hour count, night time footfall data for 2012 has been affected by a wet season, though the monthly trends are generally similar to 2011.

1.4 SPT Footfall

SPT have thirteen reporting periods in which they collate Subway footfall data based on numbers boarding (going through the barrier). From 2012/13 figures have been aligned to a set of 4 weekly traffic return dates whereas previous years reported on a 13 period basis along financial accounting periods. Period 1 for 2012/13 in the graph below represents the 4 weekly period ending 21 April 2012.

Table 1e[12] demonstrates that, as with much of 2011/12, the footfall figures for St Enoch Subway station for 2012/13 have so far outperformed 2009/10 and 2010/11.

Table 1e

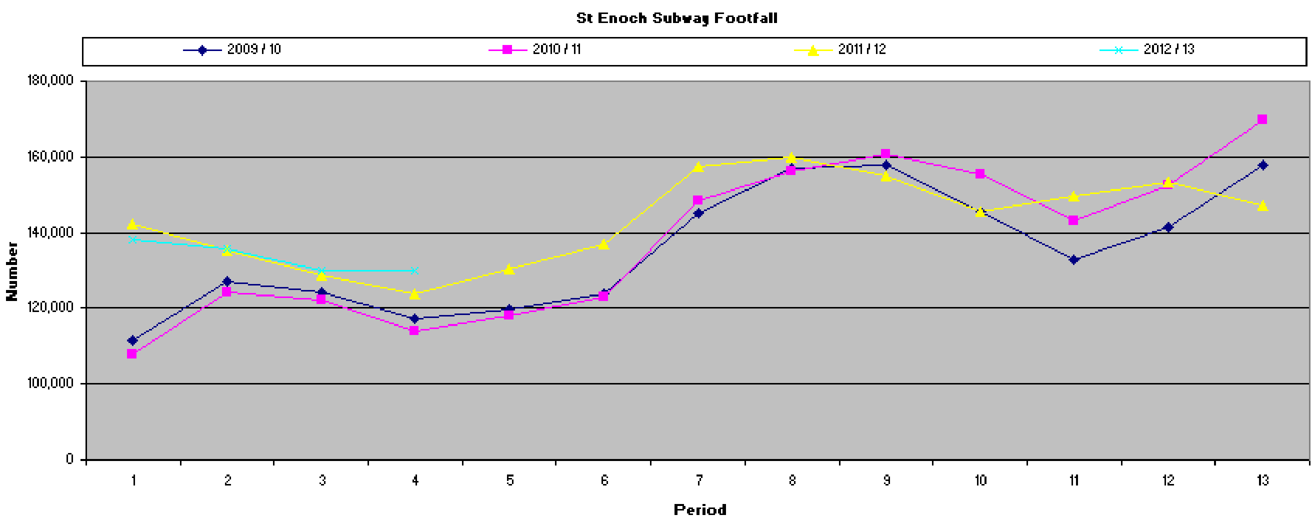


Table 1f[13] shows that Buchanan Street Subway station records a much higher footfall than St Enoch Subway station. However, from period 7 to 13 of 2011/12 Buchanan Street Subway station showed footfall levels lower than the previous years, with a -3.5% annual change between 2010/11 and 2011/12. The figures for periods 1 to 4 for 2012/13 also show a decrease on previous years. Passenger numbers making use of Ibrox Subway station have fallen, which will in part have contributed to the reduction of patronage levels at Buchanan Street Subway station.

[12] SPT, August 2012
[13] *Ibid*

Table 1f

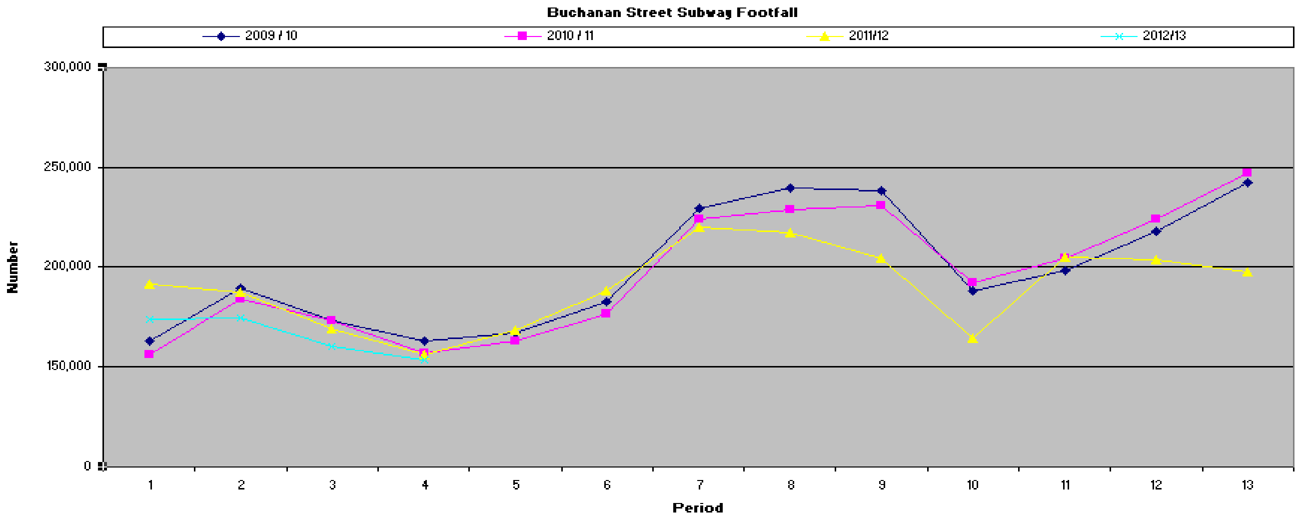
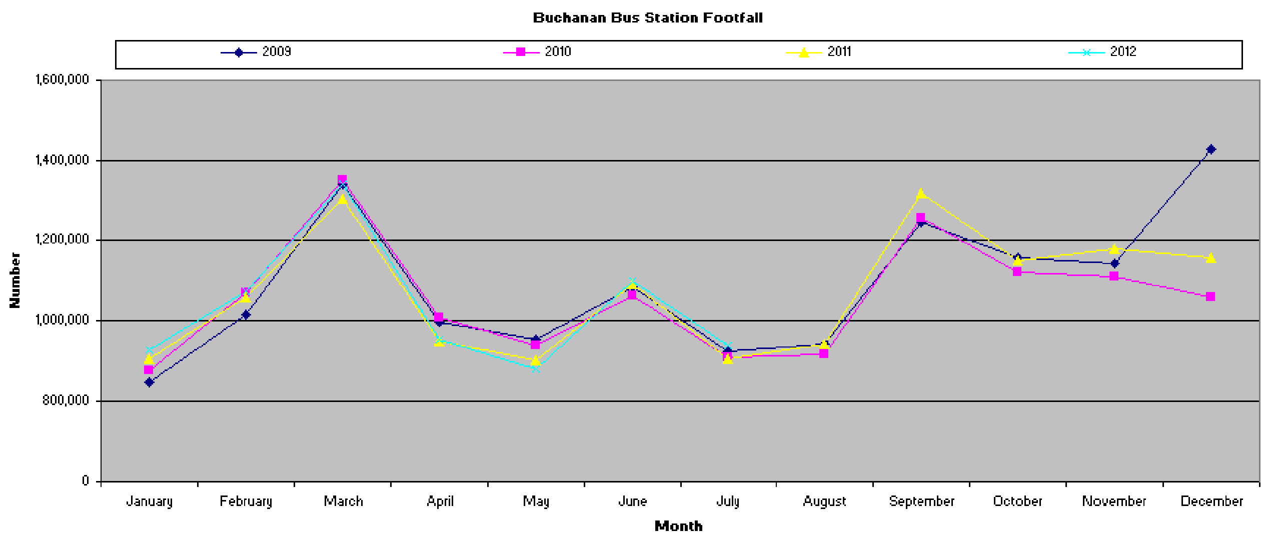


Table 1g[14] illustrates the footfall at Buchanan Bus Station. So far, all months in 2012 have increased on the comparable figure from last year (excluding May which experienced a slight decrease). Comparing the past 12 months (August 2011 – July 2012) with the previous 12 months (August 2010 – July 2011), there has been an increase of around 3.1% on total footfall at Buchanan Bus Station.

Table 1g Footfall: Buchanan Bus Station



[14] *Ibid*

2. VACANT UNITS (STYLE MILE)

Table 2a[15] illustrates the city centre's vacant unit trend since records were originally kept. From March 2010 – May 2012 this count was conducted monthly but following a review of resources, will now be produced every second month. The chart records 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). Table 2a do not include vacant units within the shopping centres on Glasgow's Style Mile.

After peaking in December 2010, the vacancy rate in the Style Mile continued to fall until January 2012 when it reached the same low level as June 2004 before the recession. There has been a slight increase over the first half of 2012.

Table 2a

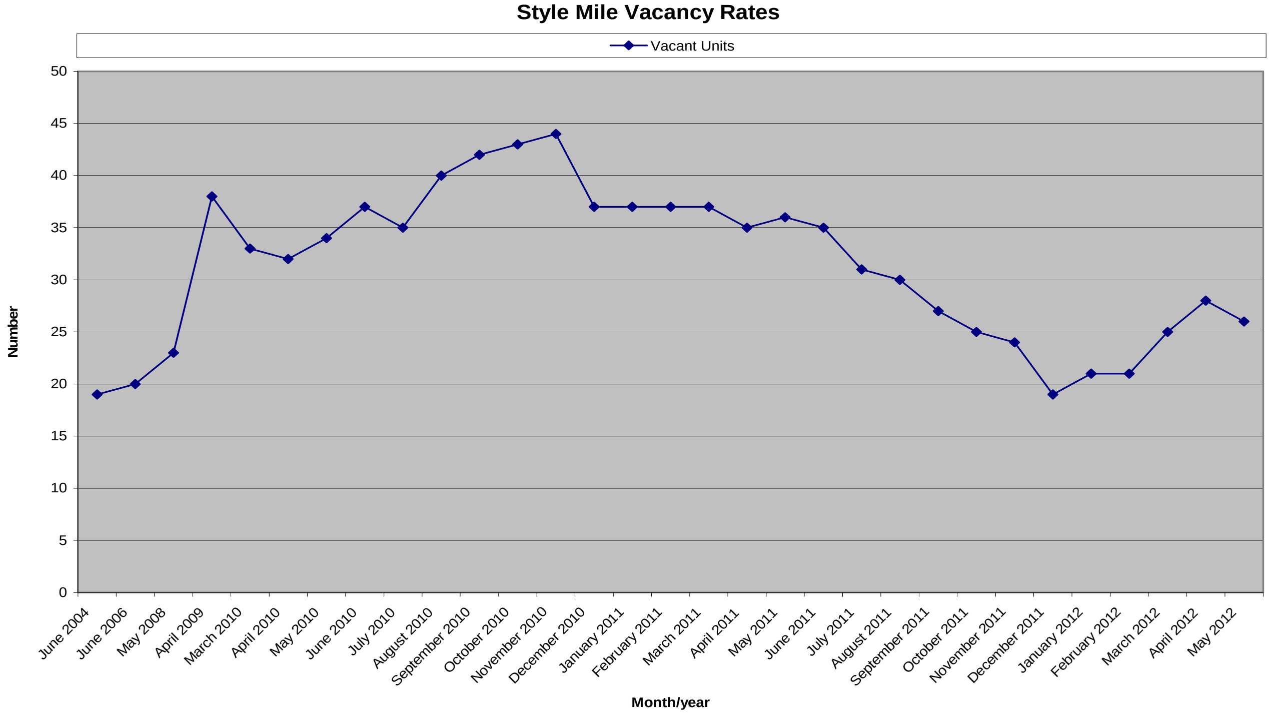


Table 2b[16] shows vacancy rates for Style Mile including shopping centres from January – May 2012. This shows that overall, between January and May there has been no change in the vacancy level. Vacancy rates in Glasgow's Style Mile at street level and including those within Buchanan Galleries, St Enoch Shopping Centre and Princes Square increased from February 2011 to February 2012 by 0.5%.

Table 2b

	January 2012	February 2012	March 2012	April 2012	May 2012
Vacancy Rate	10.9%	8.5%	9.0%	10.3%	10.9%

[15] GCC July 2012
[16] *Ibid*

3. VACANT SITES (CITY CENTRE)

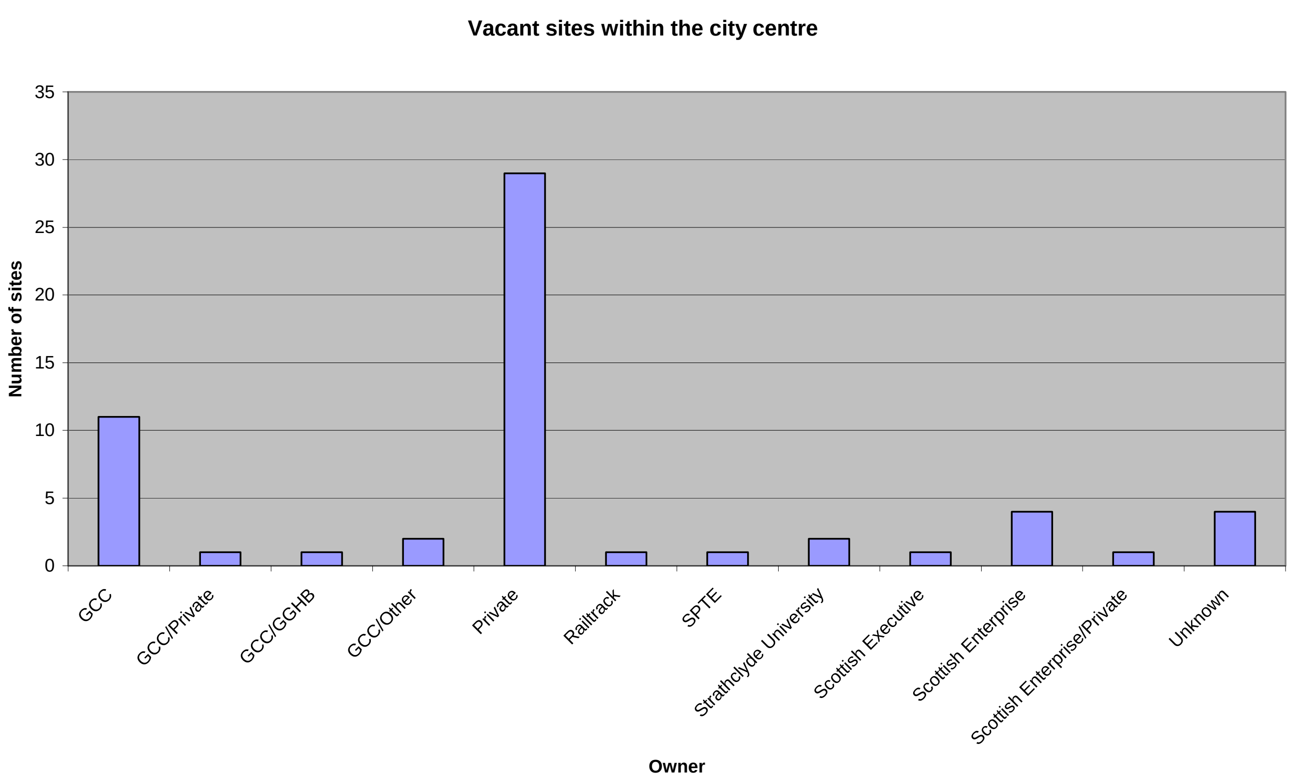
Table 3a[17] provides a 2011 annual survey of city centre vacant sites and derelict land, with their specified ownership. The following definitions apply:

- **Derelict land**: is land which has been so damaged by previous uses that it is incapable of sustaining new development without requiring some measure of remediation work
- **Vacant land**: generally includes unused or unsightly land which would benefit from development, improvement etc

The graph represents 58 sites, all between Kingston Bridge and High Street.

As the graph below indicates, 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. However, the churn rate tends to be slow because of the nature, scale and complexity of vacant sites, as well as the impact of the current global economic environment. The figures show one site less than those recorded in 2010.

Table 3a: Vacant sites (City Centre) Annual Survey 2011



[17] GCC December 2011

4. CAR PARKING

City Parking (Glasgow) LLP is one of Glasgow City Council's Arms Length External Organisations (ALEO), owning Cambridge Street, Cadogan Square, Charing Cross and Concert Square car parks which sit within the boundary of the city centre.

Table 4a[18] illustrates the number of daily entries for each of the sites per month from July 2010 to June 2012. Concert Square is the most utilised which would be expected given its proximity to Buchanan Street and the Royal Concert Hall, while Cadogan Street shows the lowest occupancy rates as it is located on the edge of the city centre.

Table 4a: City Parking Occupancy

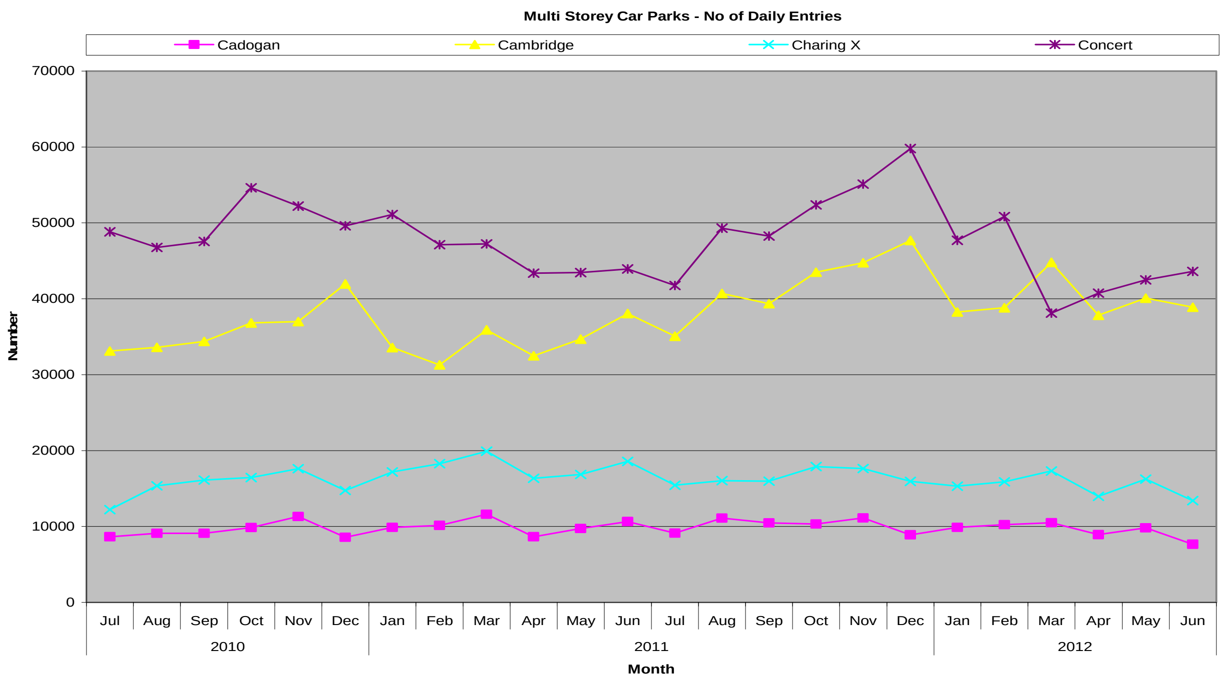
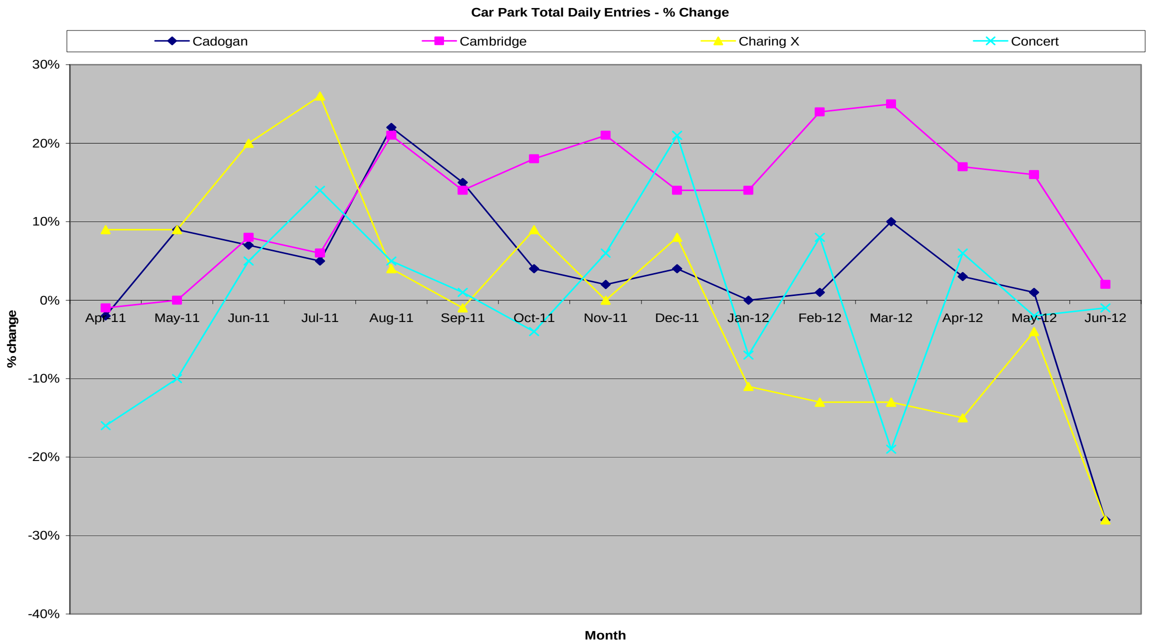


Table 4b[19] demonstrates the percentage difference change in occupancy rates against the same period the previous year. As shown, Cambridge Street experiences annual increases for almost the entire year. Cadogan Street also experienced year on year increases for the majority of the period with the exception of June 2012 which showed a disappointing decrease. Charing Cross car park shows negative change compared to 2011; this is due to peaks in March and June 2011 which were the busiest months recorded over the period shown. The Concert Hall car park is the busiest city centre site owned by City Parking.

[18] City Parking (Glasgow) LLP, August 2012
[19] *Ibid*

Table 4b



Car Park Total Daily Entries - % Change
Cadogan
Cambridge
Charing X
Concert
30%
20%
10%
0%
-10%
-20%
-30%
-40%
% change
Apr-11
May-11
Jun-11
Jul-11
Aug-11
Sep-11
Oct-11
Nov-11
Dec-11
Jan-12
Feb-12
Mar-12
Apr-12
May-12
Jun-12
Month

5. ENVIRONMENTAL INDICATORS AND CITY CENTRE INFORMATION

5.1 Street Cleanliness

Since Clean Glasgow was launched by Glasgow City Council in February 2007, independent street cleanliness surveys of the city centre have been commissioned by the Clean Glasgow team each year. These independent surveys are undertaken by the national environment agency, Keep Scotland Beautiful (KSB).

The area surveyed consists of approximately 167 street sites 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. The city centre is disaggregated into two zones which are separately scored: premier and outlying. The scores are then accumulated to produce the overall cleanliness index.

The overall cleanliness index scores for the **city centre** to date are:

- **66** in November 2011
- **66** in November 2010
- **64** in November 2009
- **66** in November 2008
- **66** in September 2007
- **62** in March 2007 (when Clean Glasgow was launched).

All areas have shown an almost stable score for city centre cleanliness other than the survey in November 2009 which demonstrated a fall in performance. This was attributed to the impact of two periods of industrial action, and the worst winter weather in several decades.

The Keep Scotland Beautiful 2011/12 annual survey results for **city-wide** cleanliness awarded Glasgow its **highest ever rating of 72**, (a 26% improvement since 2000) with zero tolerance on littering, graffiti, dog fouling, fly tipping, fly posting, chewing gum and cigarette butts being thrown onto the pavements.

In June 2012, ‘Recycle on the Go’ bins were launched in the city centre to improve cleanliness and increase waste recycling.

5.2 Key Performance Indicators (KPIs)

Glasgow Community and Safety Services present various quarterly performance indicators[20]. Below is a sample of these indicators relevant to the city centre from January – June 2012, and the previous six months for comparison.

Please note that figures collated incorporate Partick West, Hillhead and Anderston City. From April 2012 this data has been collected by ward and future editions of the City Centre Health Check will present data for the city centre only.

As shown, performance over the past six months has increased greatly against the previous six.

	Jul – Dec 2011	**Jan – Jun 2012**
• Square meterage of graffiti removed	11021	12784
• Square meterage of flyposting removed	275	784
• Fixed penalty notices issued (includes flytipping, dog fouling and litter)	3341	2591
• Number of school, community and business clean-ups undertaken	30	141
• Number of volunteers actively engaged with GCSS through ECAT/NIAS[21]	221	1367

[20] GCSS, August 2012
[21] ECAT (Environmental Community Action Teams) were renamed NIES (Neighbourhood Improvement and Enforcement Service) in April 2012

5.3 Crime and antisocial behaviour

Table 5a[22] provides data on crime, incidents and antisocial behaviour (ASB) covering the period covered by this health check and the previous 6 month period. The table shows that between the two periods, ASB incidents, youth disorder and violent crime recorded have all decreased, while the ASB crime recorded has increased slightly between the two periods.

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.

Table 5a:
Crime/ASB indicators - Central & West neighbourhood

KPI Type	July - December 2011	January – June 2012	+/-	% change
ASB Incidents	8475	7880	- 595	- 7.0%
Youth Disorder	743	600	- 143	- 19.2%
ASB Crime	6713	6884	+ 171	2.5%
Violent Crime	1935	1410	- 525	-27.1%

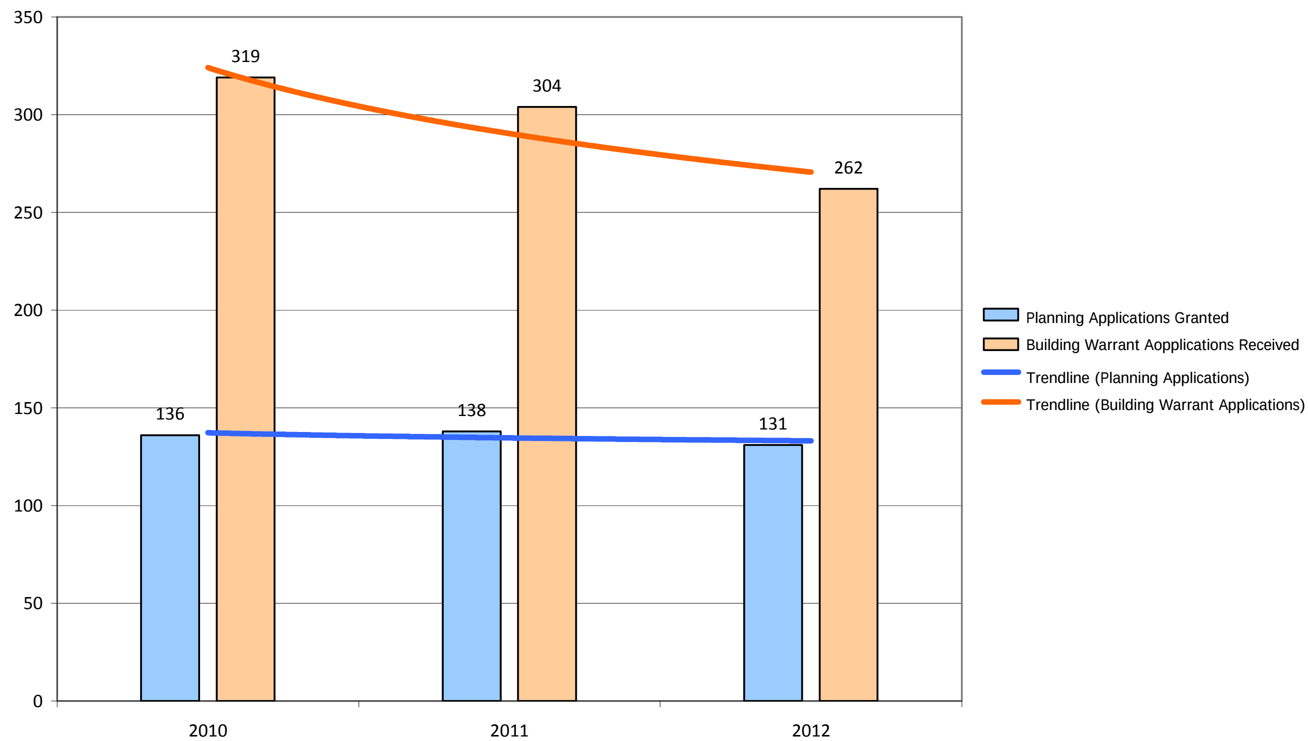
[22] Strathclyde Police September 2012

6. PLANNING AND DEVELOPMENT

6.1 Planning Applications and Building Warrant Applications

Table 6a[23] provides a comparison on planning applications granted and building warrant applications received on Ward 10 Anderston/City centre basis from January to June in 2010, 2011 and 2012. The number of planning applications granted in this period have remained steady only decreasing by 3.8% whereas the number of building warrant applications received have decreased by 17.9%

Table 6a: January – June Comparisons



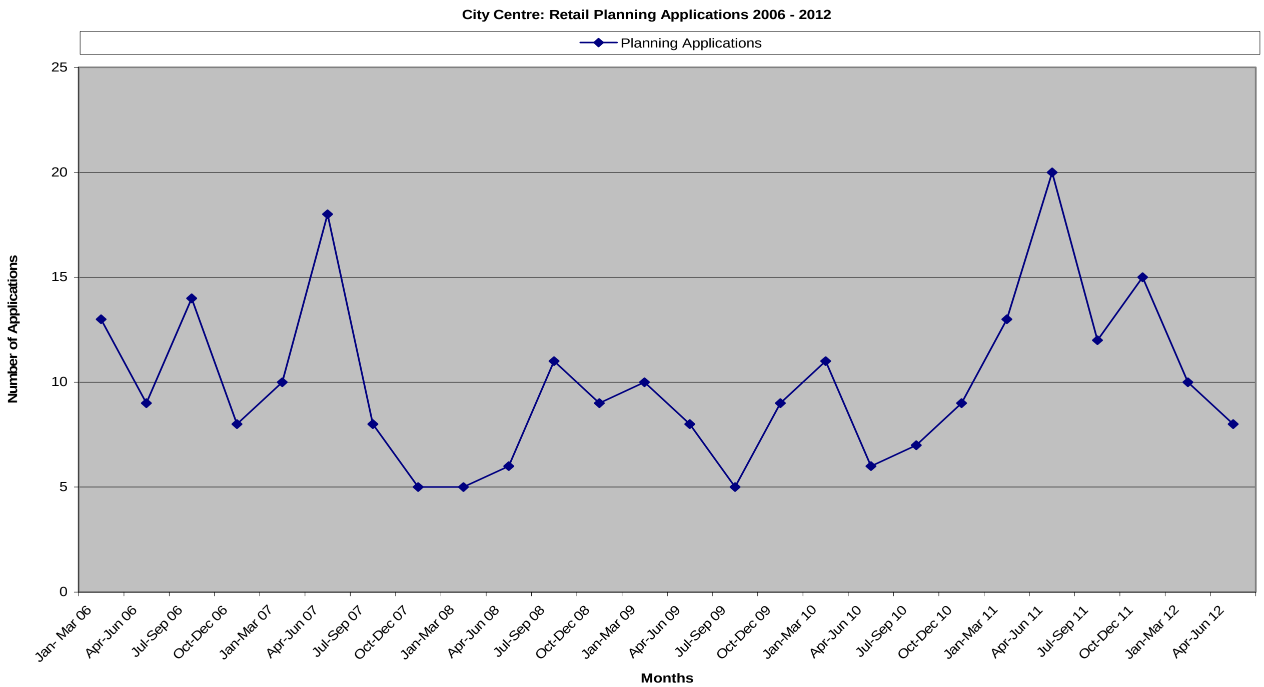
6.2 City Centre Retail Planning Applications

Table 6b[24] tracks the quarterly numbers of retail planning applications approved since January 2006 – June 2012 using monthly data collated by GCC.

The number of retail planning applications approved per quarter peaked in April – June 2011 which was the highest level since 2006. Since this peak, the number has fallen however comparing January – June figures for previous years, while it is down on last year the approval numbers are higher that January – June figures 2008 to 2010.

[23] GCC August 2012
[24] *Ibid*

Table 6b


City Centre: Retail Planning Applications 2006 - 2012
Planning Applications
Number of Applications
0
5
10
15
20
25
Jan- Mar 06
Apr-Jun 06
Jul-Sep 06
Oct-Dec 06
Jan-Mar 07
Apr-Jun 07
Jul-Sep 07
Oct-Dec 07
Jan-Mar 08
Apr-Jun 08
Jul-Sep 08
Oct-Dec 08
Jan-Mar 09
Apr-Jun 09
Jul-Sep 09
Oct-Dec 09
Jan-Mar 10
Apr-Jun 10
Jul-Sep 10
Oct-Dec 10
Jan-Mar 11
Apr-Jun 11
Jul-Sep 11
Oct-Dec 11
Jan-Mar 12
Apr-Jun 12
Months

7. TOURISM

7.1 Glasgow Hotel Occupancy Rates

The data recorded for hotel occupancy rates is based on 22 city centre hotels.

Table 7a[25] illustrates the hotel occupancy rates from 2009 to June 2012. The 2012 data so far has improved on previous years and retains the existing yearly trends.

Table 7a

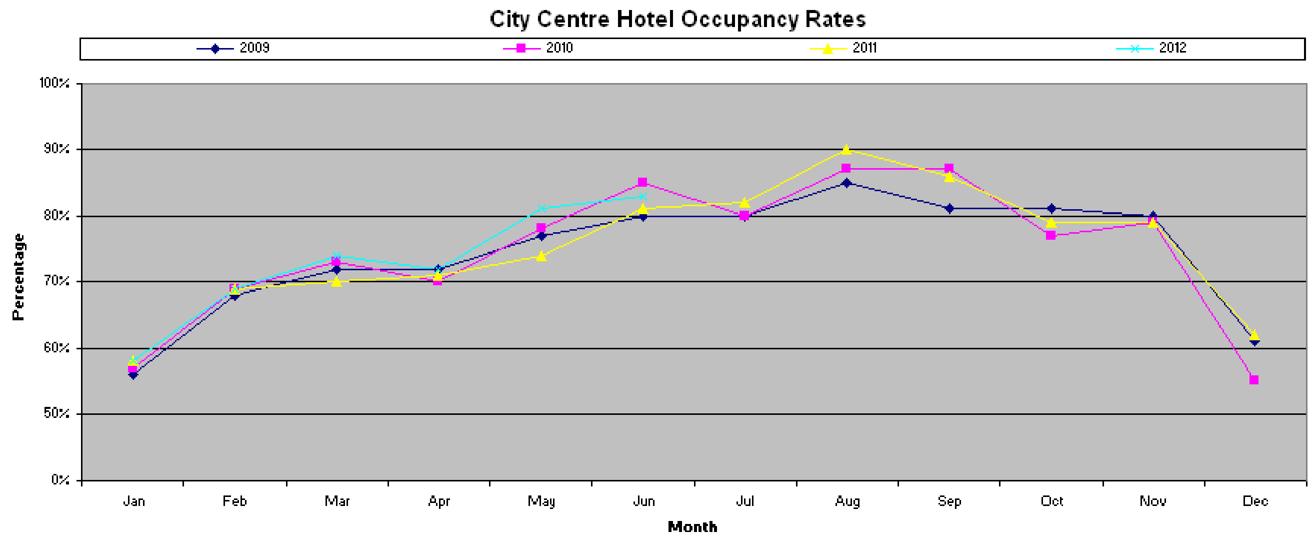
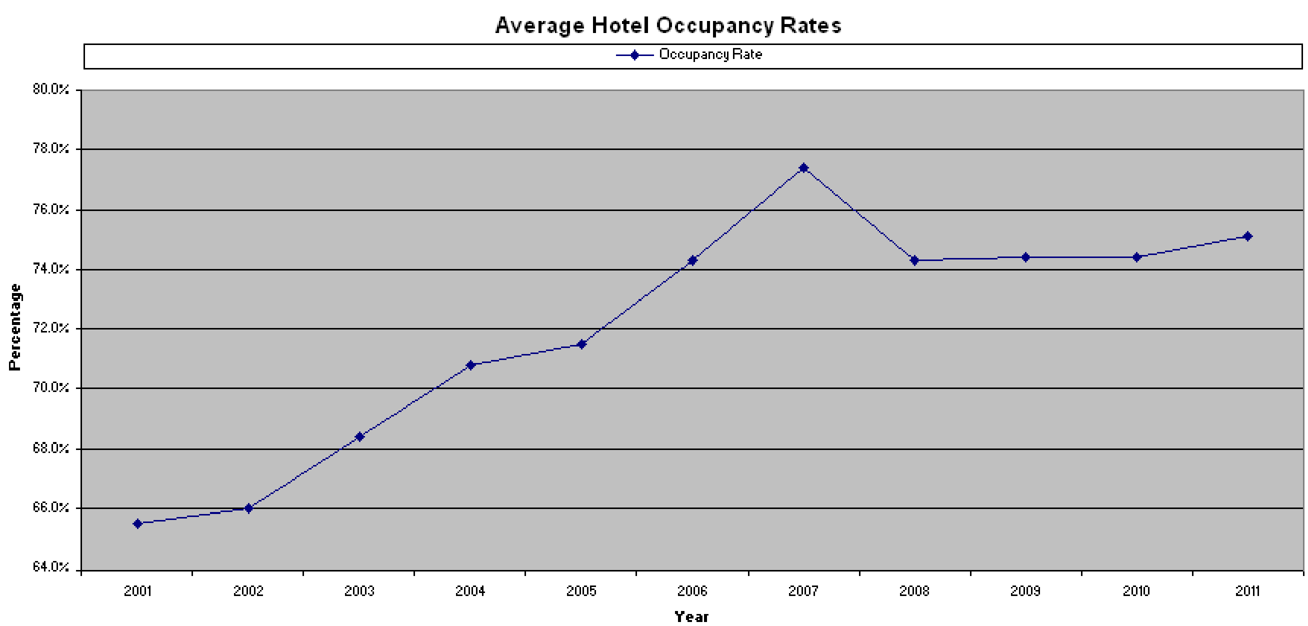


Table 7b[26] illustrates the average hotel occupancy rates for previous years. As shown this rose between 2001 and 2007 by 9.9%. Having fallen in 2008, the rate is slowly increasing again.

Table 7b



[25] GGHA City of Glasgow Forecaster – Zone A (provided by GCMB July 2012)
[26] *Ibid*

7.2 Tourist Surveys

Around 400 people are surveyed per quarter by Lynn Jones Forecasting, using the Visitract online survey system by which email addresses are taken from visitors and then sent an online questionnaire. The addresses are captured from various locations throughout the city, though tend to be around the city centre and west end due to the majority of visitor attractions being located in these areas – therefore results are not city centre only.

A score that is below 8 is considered to be below standard. The results compared to those of the period shown last year have remained fairly similar. The biggest decrease was by 0.29 points which disappointingly was to the rating of the cleanliness of Glasgow and was the lowest ranked in the previous period. The rating of Glasgow overall has increased slightly.

Rating		01/7/11 – 30/11/11	01/01/12 – 30/06/12
No. of nights		Ave 2.58	Ave. 2.55
Quality rating of accommodation	**3 star**	29%	34%
	4 star	33%	29%
	5 star	7%	6%
	Don't know	18%	16%
Customer service in visitor attractions		Ave 8.56	Ave 8.51
Customer service in restaurants/cafes		Ave 8.23	Ave 8.27
Customer service in pubs		Ave 8.03	Ave 8.08
Customer service in Visitor Information Centre		Ave 8.28	Ave 8.15
Customer service in shops		Ave 8.18	Ave 8.14
Customer service in transport		Ave 8.17	Ave 8.16
Customer service in accommodation		Ave 8.25	Ave 8.33
Customer service in performing arts venues		Ave 8.70	Ave 8.47
Cleanliness		Ave 7.13	Ave 6.84
Safety		Ave 7.53	Ave 7.40
Value for money		Ave 7.55	Ave 7.54
Glasgow overall		**Ave 8.21**	**Ave 8.23**

7.3 Glasgow International Airport: Passenger Numbers

Glasgow International Airport operates 365 days a year, 24 hours a day and deals with approximately 7 million passengers a year. Over the last 10 years more than £200 million has been invested which includes the £31 million terminal extension[27]. 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 7c[28] illustrates Glasgow Airport's passenger numbers and how it compares to an average of other cities which include Birmingham, Bristol, Cardiff, Edinburgh, Gatwick, Heathrow, Leeds, Liverpool, London City, London Luton, Manchester, Newcastle, Norwich and Stansted. The figures cover the period January 2009 – November 2011 and relate to the number of terminal passengers recorded by Civil Aviation Authority. Glasgow Airport and its' comparators demonstrate the same yearly trends.

[27] Glasgow Airport website accessed August 2012
[28] CAA website accessed August 2012

Table 7c

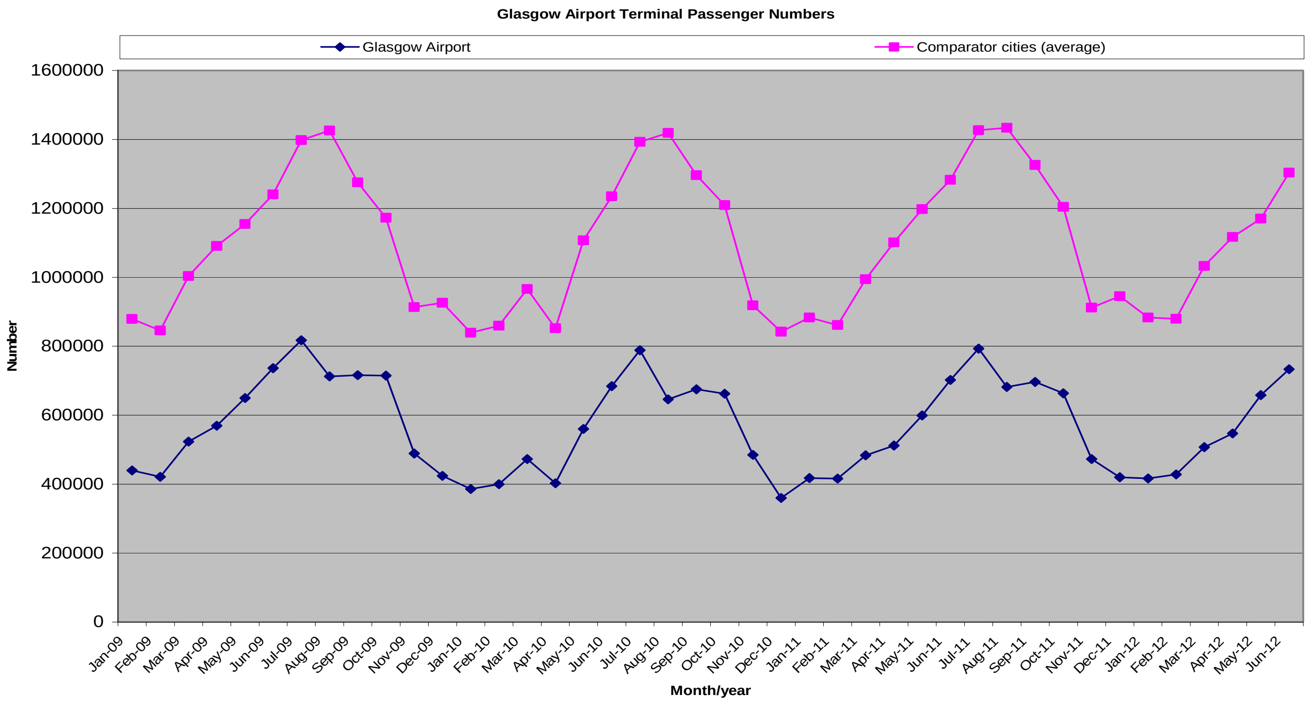
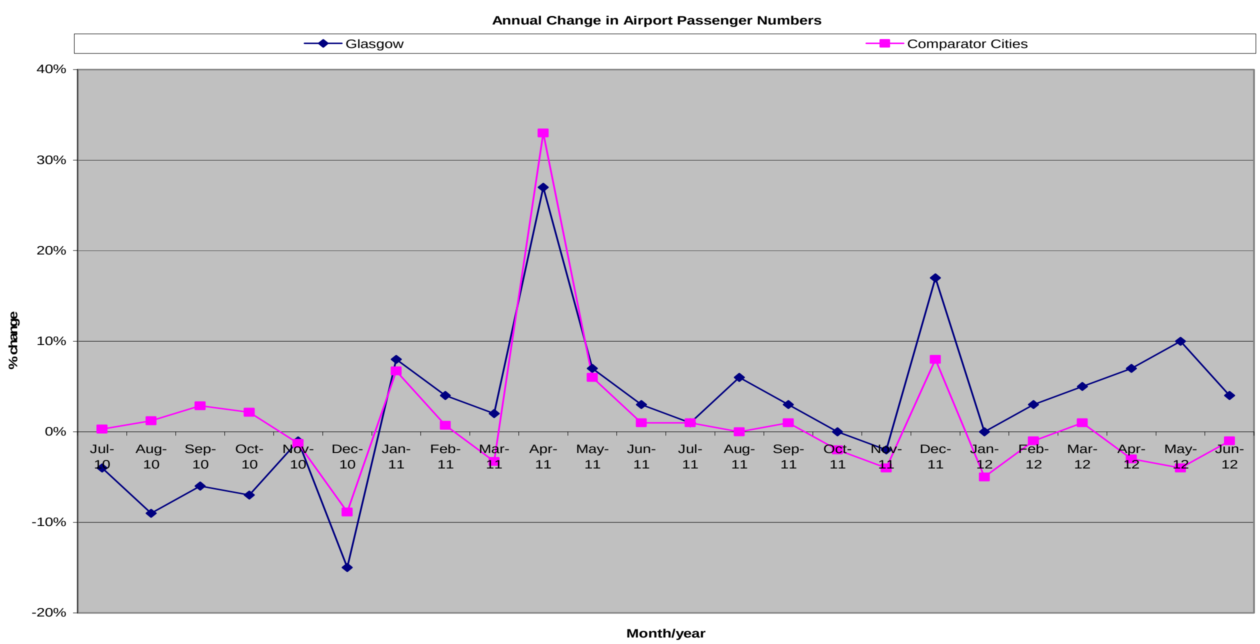


Table 7d[29] shows the annual percentage rate changes for Glasgow against the average of the comparator cities. The graph shows similar trends are experienced in Glasgow as those elsewhere. As shown though, from August 2011, Glasgow has experienced annual increases above the comparator cities' average.

Table 7d



29 *Ibid*

8. GLASGOW GOOD NEWS

BMI purchase boosts British Airways domestic services from Winter 2012 - 27 June 2012
http://www.glasgowchamberofcommerce.com/news/member-news/2012/june-2012/bmi-purchase-boosts-british-airways-domestic-services-from-winter-2012.aspx

Europe's biggest Thai restaurant comes to Glasgow - 28 June 2012
http://www.tasteofglasgow.com/2012/06/europes-biggest-thai-restaurant-is-coming-to-glasgow/

Hundreds chase chance to grab prestigious Style Mile flats - 2 July 2012
http://www.eveningtimes.co.uk/news/hundreds-chase-chance-to-grab-prestigious-style-mile-flats.17997689

Glasgow unveils strategy to retain its position as leading world sporting city - 3 July 2012
http://www.glasgow.gov.uk/en/News/GlasgowSportsEventsStrategy.htm

Glasgow welcomes Her Majesty - 4 July 2012
http://www.glasgowchamberofcommerce.com/news/glasgow-buzz/2012/july/glasgow-welcomes-her-majesty.aspx

Glasgow's open for business - 11 July 2012
http://www.eveningtimes.co.uk/news/glasgows-open-for-business.18108918

Praise for police unit after violent crime drops by a quarter - 12 July 2012
http://local.stv.tv/glasgow/110634-praise-for-police-unit-after-violent-crime-drops-by-a-quarter/

Blythswood Square Hotel announced £1m profit - 19 July 2012
http://www.heraldscotland.com/business/company-news/blythswood-square-hotel-announces-1m-profits.18185471

SECC is a top 20 world venue - 19 July 2012
http://www.eveningtimes.co.uk/news/secc-is-a-top-20-world-venue.18185114

Power giants new £100m HQ to spark city jobs boost - 20 July 2012
http://www.eveningtimes.co.uk/news/power-giants-new-100m-hq-to-spark-city-jobs-boost.18197158

Olympic Football Comes to Glasgow – 26 July 2012
http://www.glasgowchamberofcommerce.com/news/glasgow-buzz/2012/july/olympic-football-kicks-off.aspx

The Fast and Furious 6 to film in Glasgow - 1 August 2012
http://www.bbc.co.uk/news/uk-scotland-glasgow-west-19077463

Buchanan Galleries brings JOY to the city - 5 August 2012
http://www.melodika.net/index.php?option=com_content&task=view&id=347439&Itemid=54

Piping Live! £12m boost to Scottish economy – 12 August 2012
http://www.glasgowchamberofcommerce.com/news/glasgow-buzz/2012/august/piping-live!-£12m-boost-to-scottish-economy.aspx

Office Take Up Increased Across Major Scottish Cities – 13 August 2012
http://www.glasgowchamberofcommerce.com/news/member-news/2012/august-2012/office-take-up-increases-across-major-scottish-cities.aspx

Four New Stores at St Enoch Centre – 7 September 2012
http://www.shopping-centre.co.uk/news/fullstory.php/aid/5547/Four_new_stores_at_St._Enoch_Centre.html

City Parade to Honour Olympians – 6 September 2012
http://www.eveningtimes.co.uk/news/city-parade-to-honour-olympians.18788758

9. MAILING LIST AND SURVEY

To subscribe to the Health Check please send an email to the address below with your contact details. Alternatively you can access the latest and archived issues at www.glasgow.gov.uk/en/Business/CityCentre.

We would also be interested to hear your views on the Health Check via our Online Survey

For any further information please contact

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