GLASGOW CITY CENTRE

ECONOMIC HEALTHCHECK

Issue 4: May 2011

Welcome to the fourth edition of Glasgow city centre's Economic Healthcheck: a quarterly progress report on how the city centre is performing on a range of indicators. Its objective is to track the impact of economic conditions on the city centre, and to provide a baseline from which future performance can be benchmarked. It is produced by the City Centre Initiatives Team in Glasgow City Council's Development and Regeneration Services, using data collected and analysed from a variety of identified sources. Data in this issue is focused on 2010/11 third quarter: October to December 2010.

In summary:

Indicator	Quarterly Trend	Annual trend	Comment
Footfall (daytime)	↑	↑	
Vacant units	↑	→	
Crime	↑	↓	
Planning & Development	↓	↓	
Tourism	↑	→	

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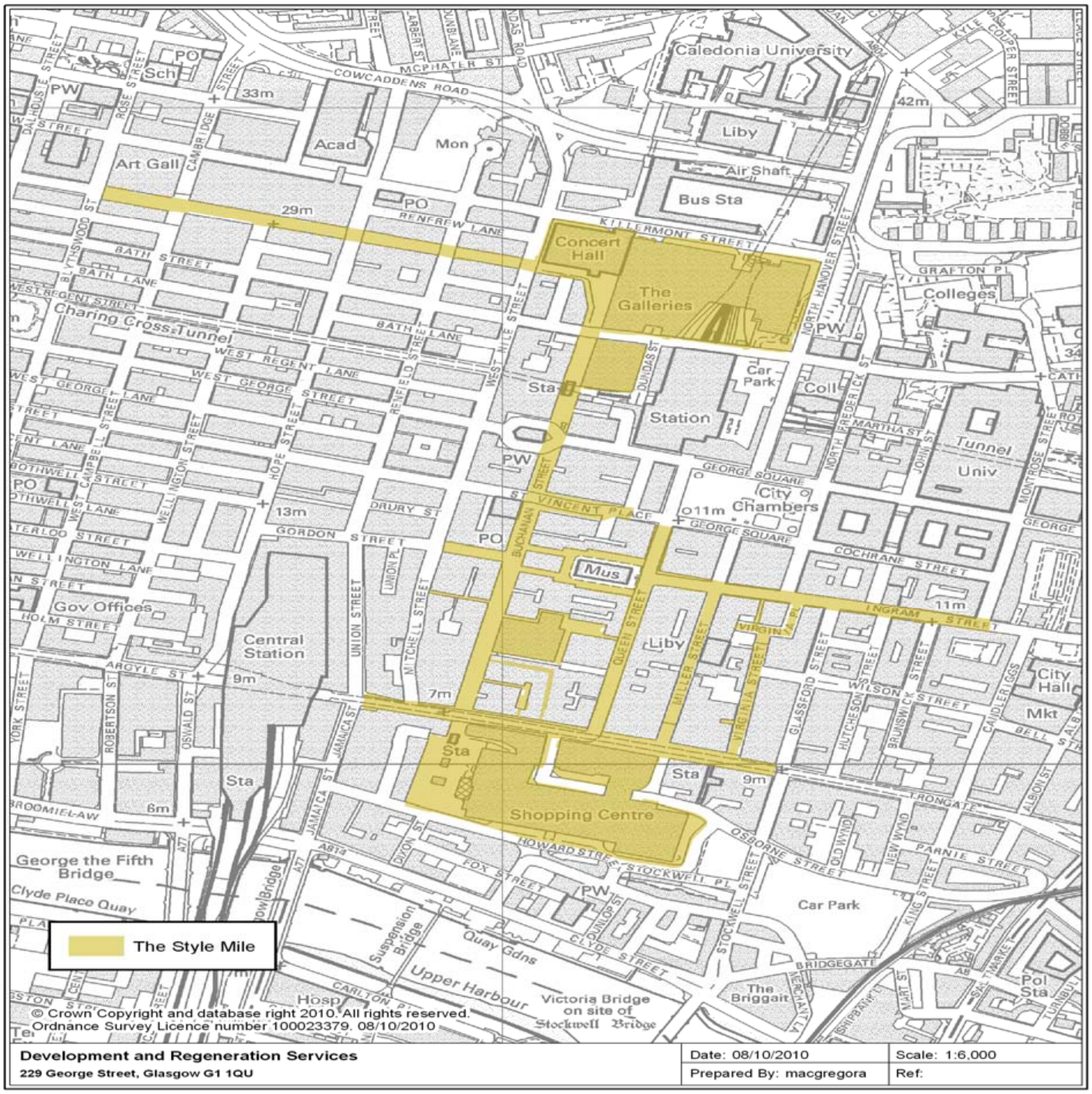
Style Mile: Background and Area Map

Over the past two years, Glasgow City Council has worked with Glasgow Chamber of Commerce and major city centre retail and leisure operators on an action plan for the principal retail district, branded "Style Mile". Publically launched in August 2009, the Style Mile is a public private partnership initiative to promote, protect and enhance Glasgow's city centre retail offering and capitalise on the area's designation as the UK's top retail destination outside London's West End.[1] In addition to this ranking Buchanan Street has been rated 10th place on the "Main Streets Across the World 2010" league table[2], while Glasgow city centre has been ranked 18th of the top 25 European retail destinations – the only UK destination outside London's west end to make the top 20.[3] .



[1] CACI press release and full report can be found at http://www.caci.co.uk/492.aspx
Experian Definitive 2008 Retail Rankings http://press.experian.com/press_releases.cfm

[2] Main Streets Across the World 2010, Cushman & Wakefield

[3] Experian/Jones Lang La Salle, European Retail Rankings 2009

1. FOOTFALL

1.1 Daytime Footfall monitor: Quarter 3 (October - December 2009/2010)

The Style Mile footfall monitor is produced by Glasgow Chamber of Commerce to identify footfall trends in the style mile area and to provide information on general city centre activity for business planning and analysis. This data is provided through in-store footfall counters supplied by a cross section of city centre retailers.

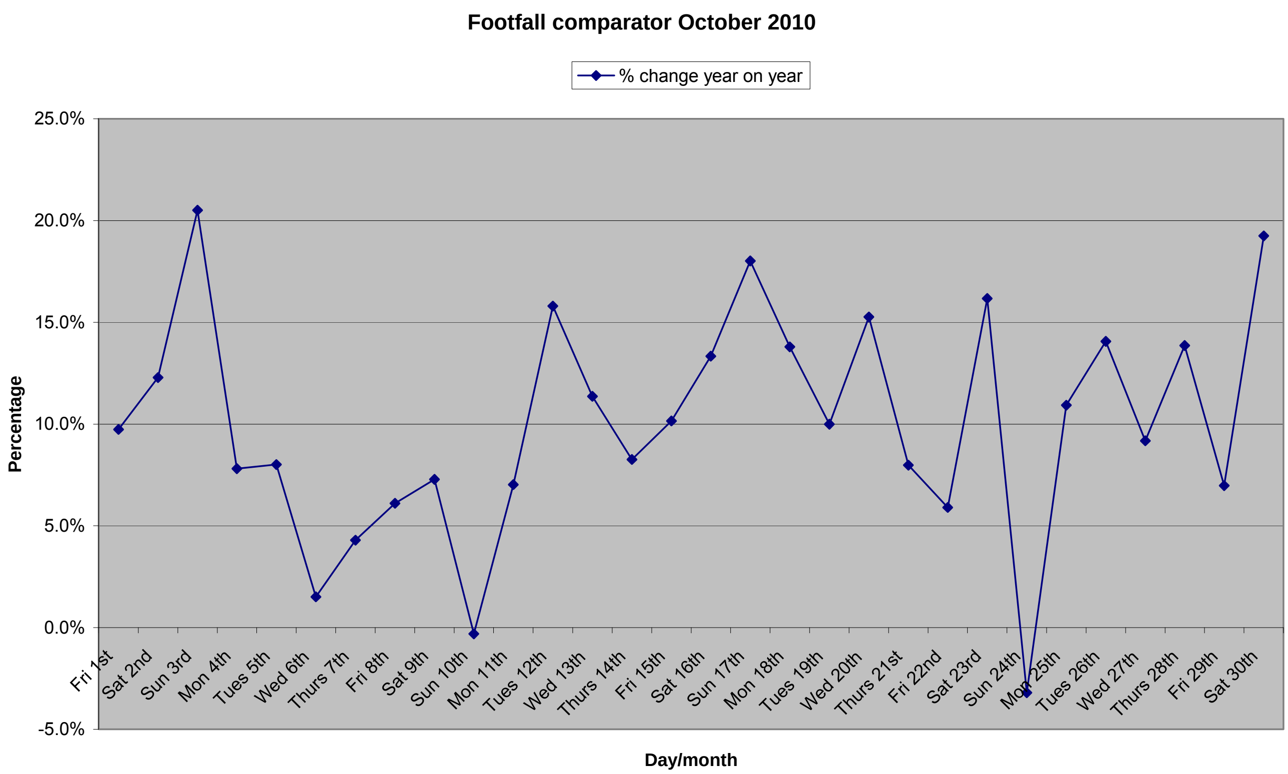
Glasgow City Council has now commissioned additional footfall counters which will provide a high street footfall counting service within the Style Mile. These supplementary Springboard footfall counters became live on 5th November 2010 and this data will now feature in the Healthcheck as a further indication on footfall trends. In total Springboard have 4 counters operational, located on Buchanan Street at the Galleries and further down the precinct at Lush, Argyle Street at Debenhams and Sauchiehall Street at Marks and Spencer. The counter at Buchanan Street has been in operation since 18th May 2007.

Data produced via in-store footfall counters

October - December 2010

Table 1a compares daily year on year percentage changes in footfall across the Style Mile in October 2010 against the same period for 2009, ensuring a like for like trend.

Table 1a[4]: Daytime Footfall October 2010



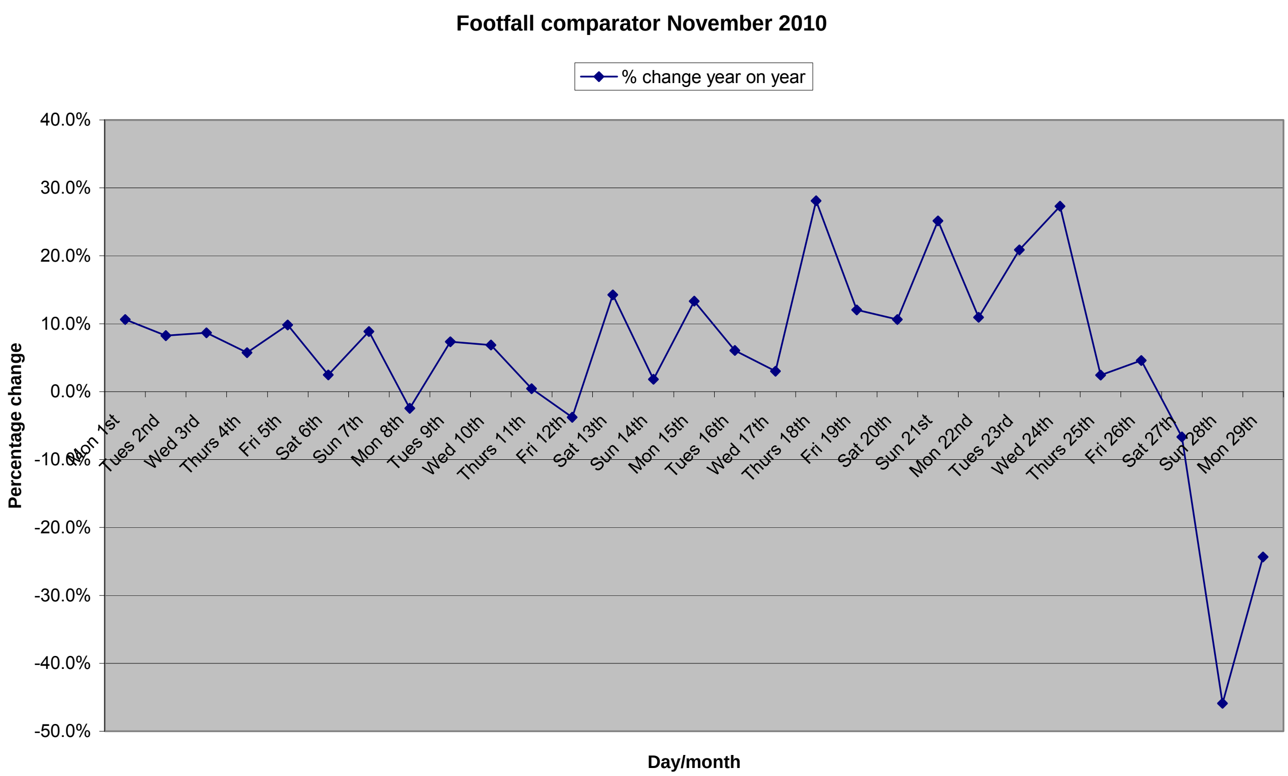
[4] Glasgow Chamber of Commerce, May 2011

Key trends: October 2010

- impact of St Enoch Centre redevelopment should be recognised when viewing figures
- total average daily footfall for the style mile **increased 13%** compared to October 2009
- strongest growth experienced in 2nd half of month, however peak on Sunday 3 October (Glasgow tower blocks demolished in controlled explosion on this day which encouraged city centre footfall)

Table 1b compares daily year on year percentage changes in footfall across the Style Mile in November 2010 against the same period for 2009, ensuring a like for like trend.

Table 1b[5]: Daytime Footfall November 2010



Key Trends: November 2010

- impact of St Enoch Centre redevelopment should be recognised when viewing figures
- total average daily footfall for the style mile **increased 6%** compared to November 2009
- growth fairly steady at start of the month however deteriorated in second half as weather worsened significantly. Glasgow Airport was closed on Sunday 28 November due to snow.

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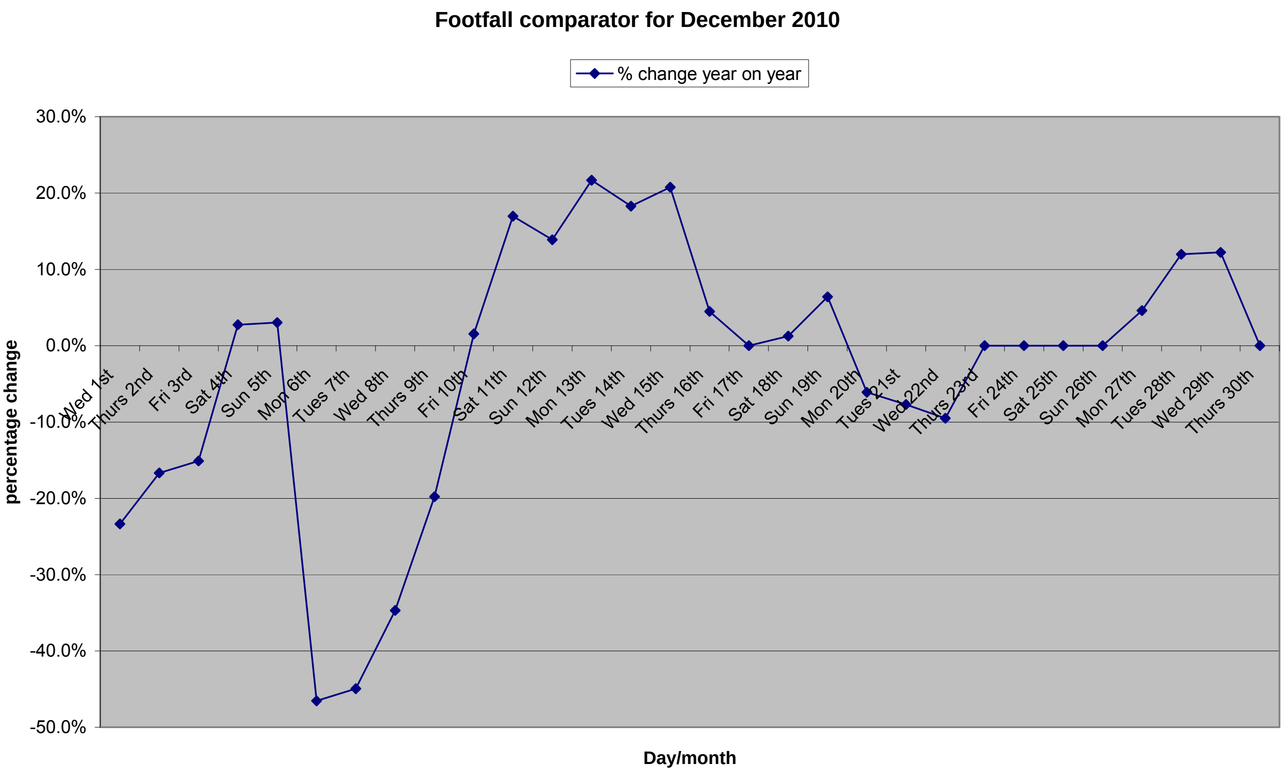
[5] Ibid

Table 1c compares daily year on year percentage changes in footfall across the Style Mile in December 2010 against the same period for 2009, ensuring a like for like trend.

Table 1c[6]: Daytime Footfall December 2010



Key Trends: December 2010

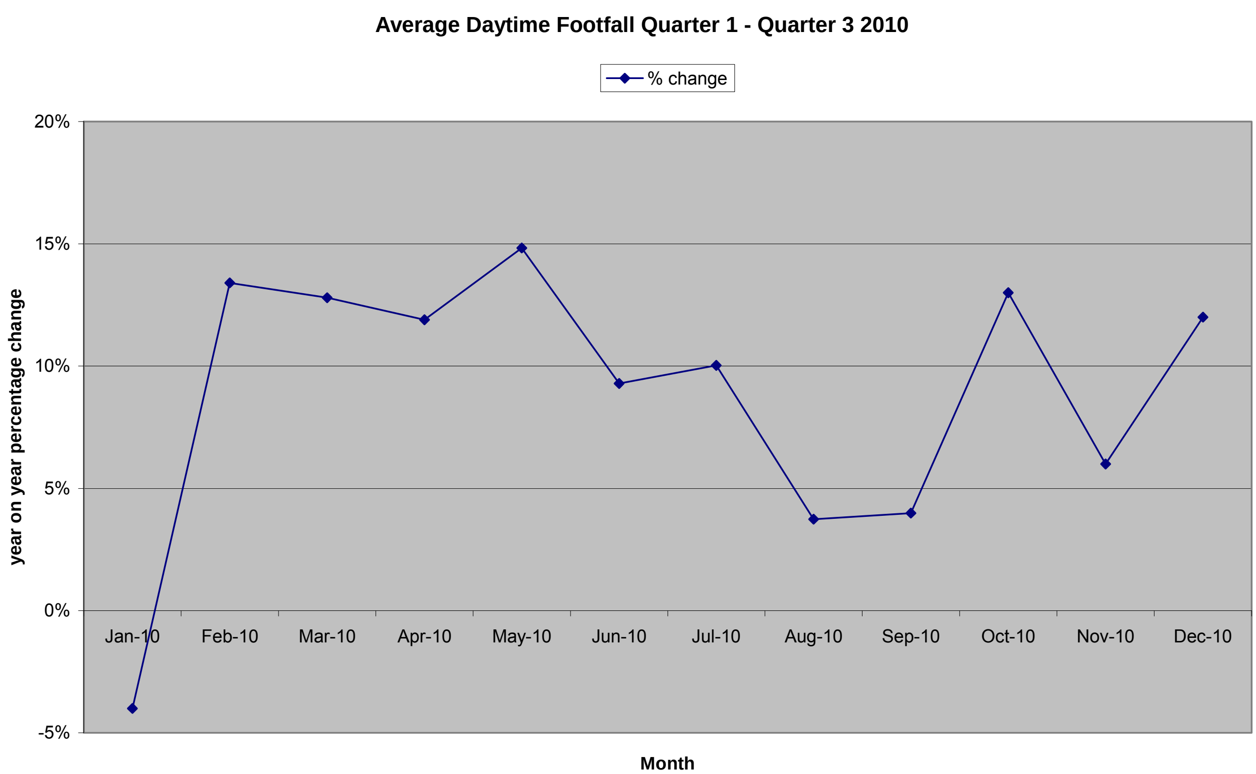
- impact of St Enoch Centre redevelopment should be recognised when viewing figures
- total average daily footfall for the style mile **increased 12%** compared to December 2009
- poor start to the month due to extreme weather conditions, however picked up towards Christmas as shoppers came into the city centre
- (please note zero values for 23 - 26 Dec due to Christmas day and Boxing day comparisons 2009 / 10)

[6] Ibid

1.2 Average daytime footfall

Table 1d below summarises average monthly footfall changes showing the year on year percentage change across the Style Mile in from the start of 2010 including Quarter 3 (October - December) 2010, compared to the same period in 2009. Average daytime footfall for quarter 3 has improved from the previous quarter and rises in October quite significantly before tailing off in November and on the rise again in December which would be anticipated given that it corresponds with the festive shopping period. This is quite a positive result despite the current economic climate.

Table 1d[7]: Average Daytime Footfall Quarter 3: October - December 2010



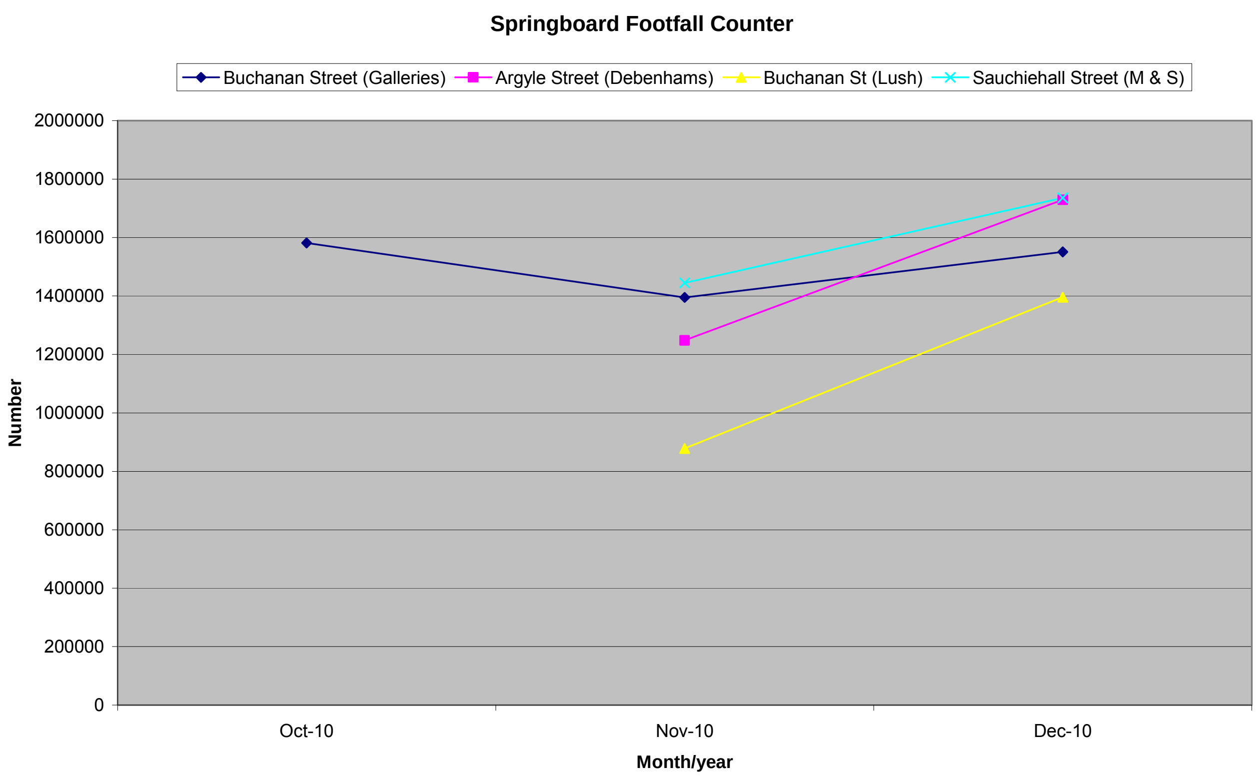
[7] Ibid

Data collated via Springboard footfall counters

1.3 **Table 1e** below shows data collated for quarter 3 October – December 2010 on the original Buchanan Street counter and the 3 additional recently installed counters. As the counters (apart from original Buchanan Street) only went live in November it is difficult to identify how the trend line may have looked over previous quarters. The graph currently illustrates a rise in all counters for November to December; again this would be expected as it covers the festive shopping period, although it is encouraging given the extreme weather conditions prevalent during this period.

Further data supplied directly from Springboard indicated that although footfall throughout the National and Regional Cities was down Glasgow had fared much better than the National and Regional Benchmarks showing a -1.8% decline as opposed to -3.5% nationally and -4.2% in the regional Cities. Glasgow City Centre's annual total for Buchanan Street for 2010 was 16,810,291 compared to 2009 total of 17,288,679[8].

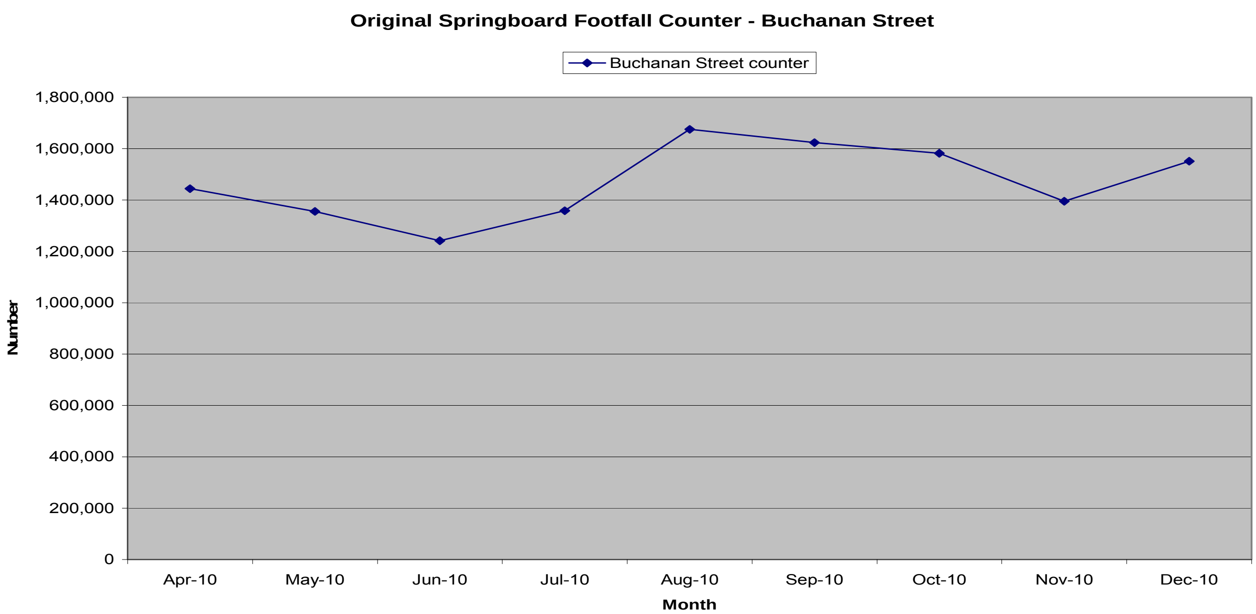
Table 1e[9]: Springboard footfall data



[8] Springboard.info April 2011
[9] Springboard Counters May 2011

Table 1f[10] illustrates the footfall statistics collated by the original Springboard counter located on Buchanan Street at the Galleries. It provides some idea as to the trend line for the first 3 quarters April – December 2010. It demonstrates a peak in August which would tie in with the school holidays coming to an end and an increase in sales of school uniforms and associated goods. The trend line then tails off slightly and again the increase reflects the festive shopping period.

Table 1f

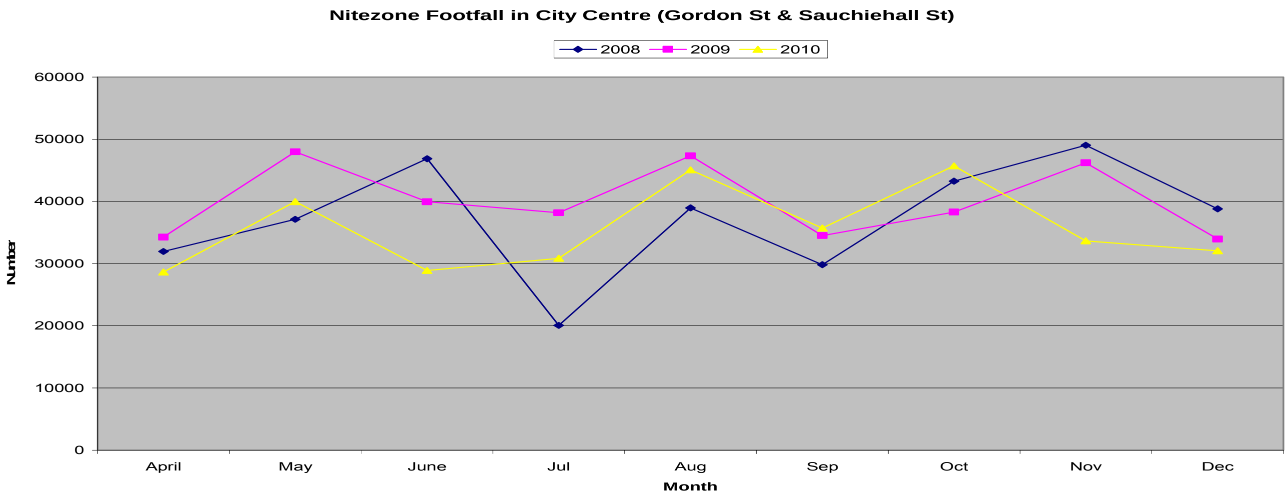


[10] Ibid

1.4 Nitezone footfall

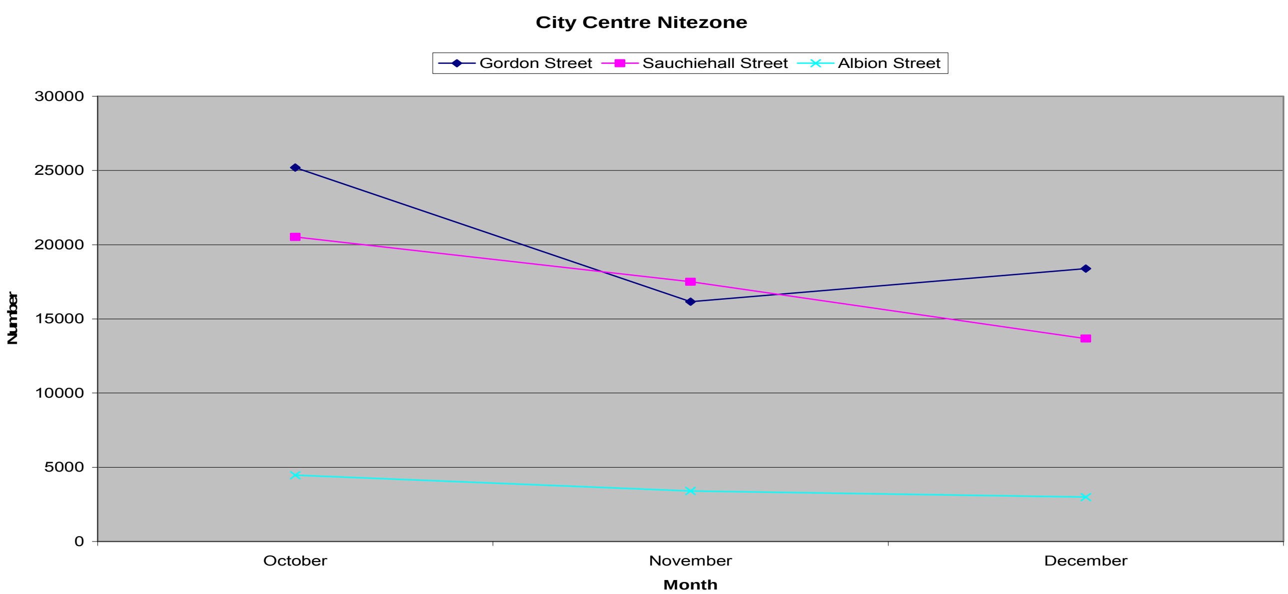
Table 1g illustrates comparative Nitezone footfall figures for 2008/09/10 for Quarter 1 – Quarter 3, April – December. The figures are combined totals for Gordon Street and Sauchiehall Street. Footfall is generally down on the previous two years with a particular dip in the first quarter of 2010. However the trend now appears to be balancing out with peaks broadly attributed to public holiday weekends.

Table 1g[11]: Nitezone Footfall: April 2008 - December 2010



On 29th September 2010 an additional Nitezone was added to include taxi marshalls at Albion Street in the Merchant City. As this only became active in September 2010 **Table 1h** has been added to this Healthcheck to illustrate the numbers at each individual taxi rank for quarter 3 – October – December 2010. As expected Albion Street figures are a lot lower given the edge of centre location, although it does indicate a fairly steady number of taxi rank users.

Table 1h[12]



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[11] Ibid
[12] Ibid

1.5 SPT Footfall

SPT have thirteen reporting periods in which they collate Subway footfall data based on numbers going through the barrier. Both tables illustrate an almost identical trend for the first 3 quarters in 2010 against the same periods in the previous year.

Table 1i[13] illustrates the St Enoch Subway Station footfall count for quarters 1, 2 & 3 2010/11 against the same period in 2009/10.

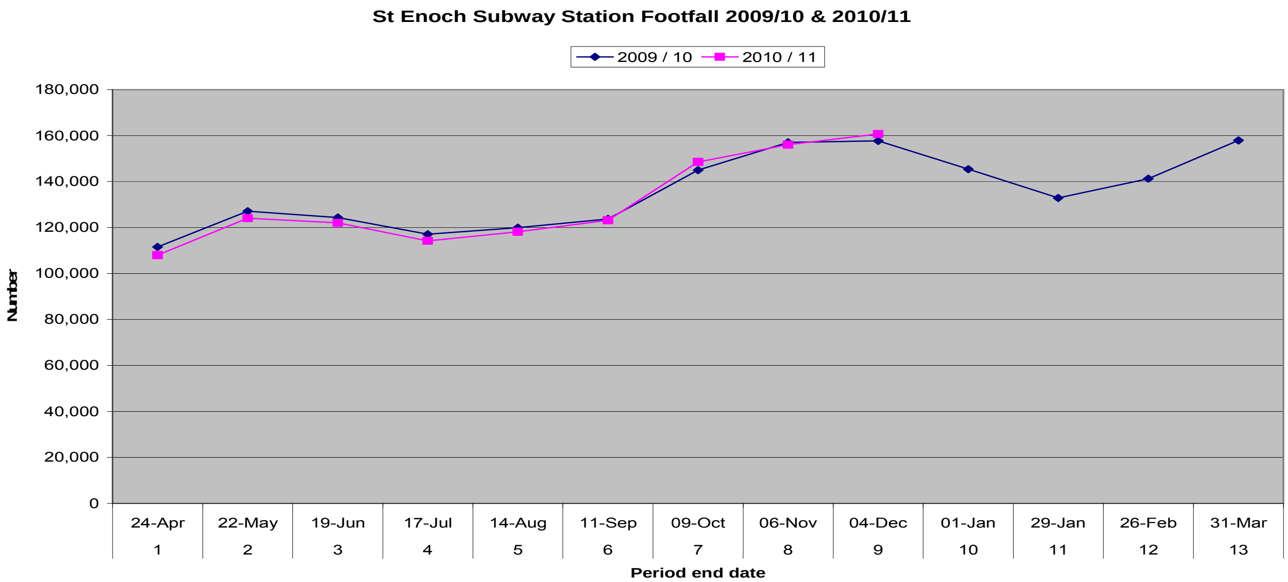
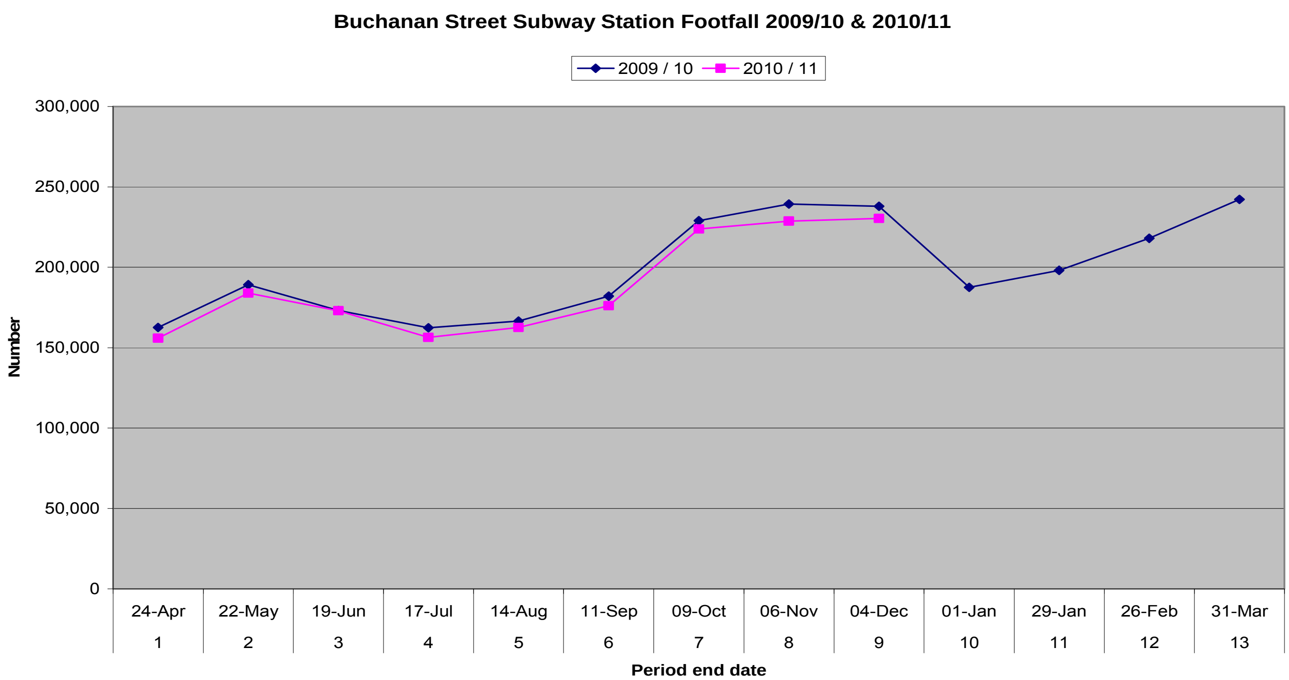


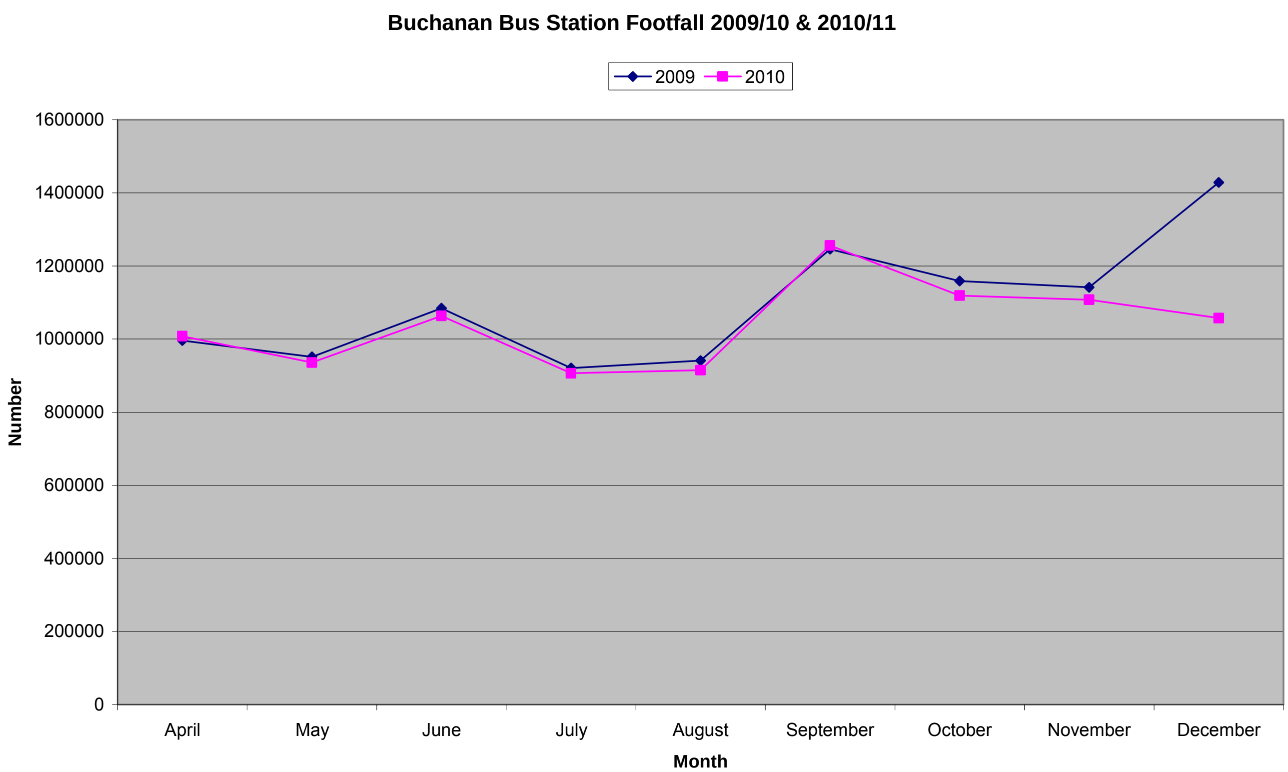
Table 1j[14] illustrates the footfall for Buchanan Street Subway Station footfall count for quarter 1, 2 and 3 2010/11 against the same period in 2009/10.



[13] SPT, April 2011
[14] Ibid

Table 1k illustrates the number of passengers using Buchanan Bus Station on a monthly basis. Figures supplied are collated in full weeks within a month so this should be taken into account when viewing the trend line. The table has compared Q1, Q2 & Q3 April 2010 – December 2010 against the same period for 2009.

Table 1k[15] Footfall: Buchanan Bus Station Q1, Q2 & Q3 April - December comparator for 2009/10 & 2010/11



[15] Ibid

* Please note that period 1 & 13 have differing amount of days

2. VACANT UNITS (STYLE MILE)

Table 2a shows the number of vacant units recorded in the Style Mile over quarter 1, 2 & 3 (April – December 2010). The trend shows an increase in number for the first quarter, a slight dip in July and then vacancy rates again increasing through to November, however encouragingly the trend is dipping again at the end of 2010. Monthly statistics have only been collated since March 2010 therefore it is not possible to show a trend line for quarter 1 and 2 2010/11 against the same period for 2009/10.

Table 2b has been included to show some earlier comparable figures which were collected on an ad-hoc basis from 2004 - the year in which the lowest number of vacant units so far have been recorded.

Table 2a[16]: Number of Vacant units (Style Mile) Quarter 1, 2 & 3: April – December 2010

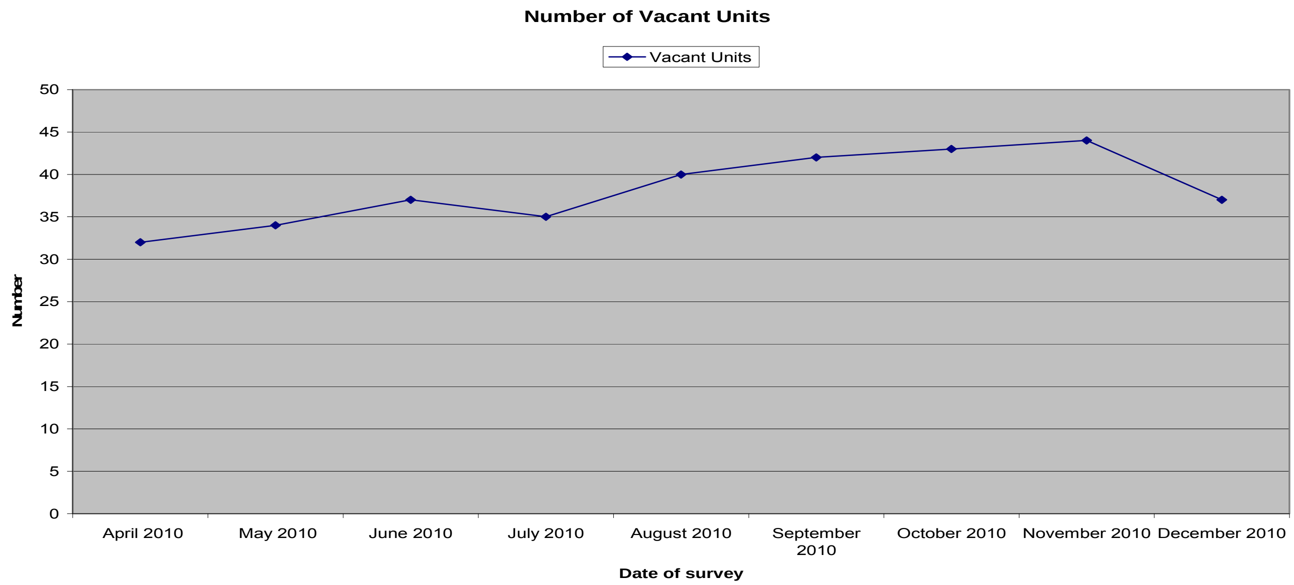
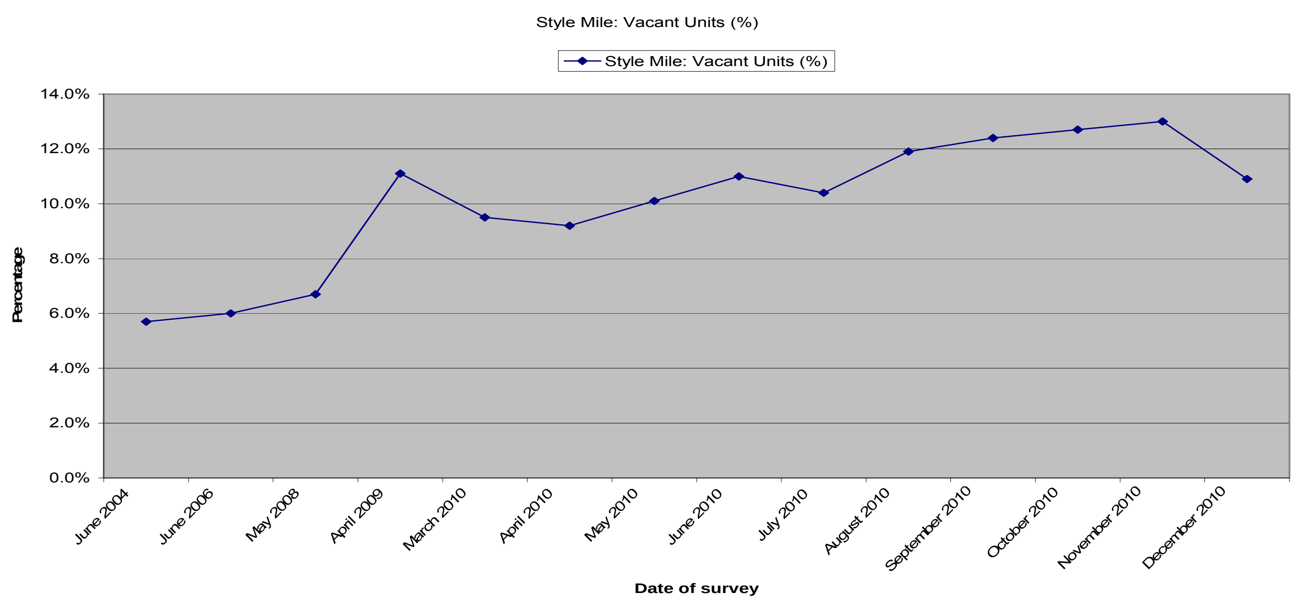


Table 2b[17]: Percentage of Vacant units (Style Mile) 2004 – December 2010



[16] Glasgow City Council, May 2011
[17] Ibid

3. CAR PARKING

Car parks owned by City Parking (Glasgow) LLP within the boundary of the city centre, include Cambridge Street, Cadogan Square, Charing Cross and Concert Square. **Table 3a** illustrates occupancy rates on the total number of vehicles per site per month for Quarter 3 October – December 2010 as well as occupancy rates for the previous Quarters 1 & 2 April – September 2010.

Table 3a[18]: City Parking Occupancy

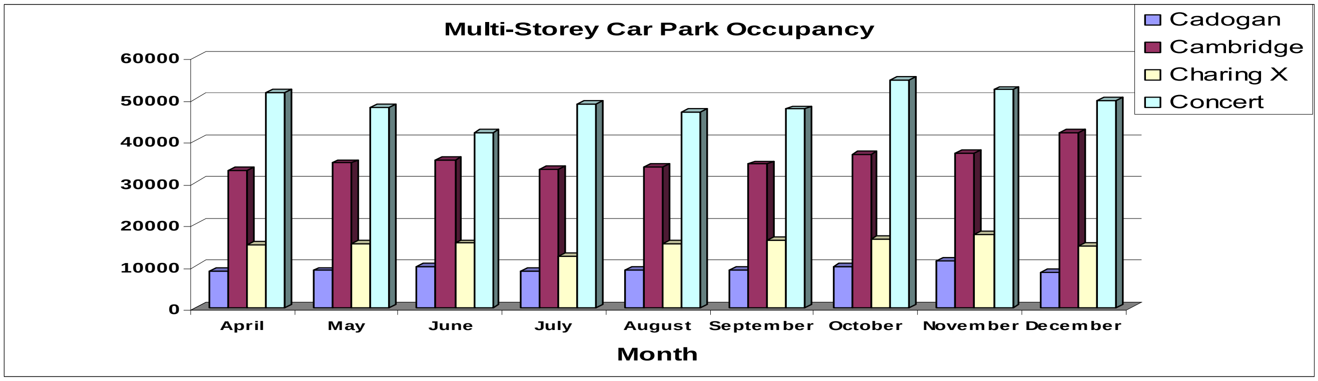
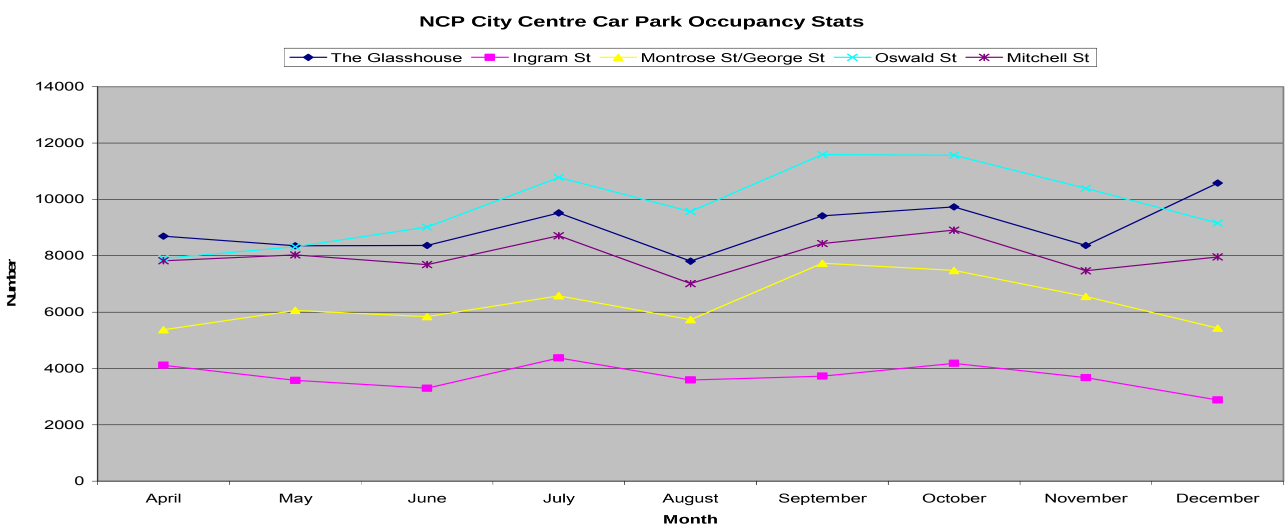


Table 3b shows NCP city centre car parks' occupancy statistics for Quarters 1, 2 & 3 2010/11. The car parks in the city centre are as follows: The Glasshouse in Glassford Street (occupancy capacity – 3,570), Ingram Street (245), Montrose Street/George Street (2,030), Oswald Street (3,885), Mitchell Street (1,540).

The trend lines for the NCP car parks monitored shows that their city centre car park occupancy rates experienced a dip in October which continues for all these car parks except Mitchell Street and the Glasshouse which rise going into December in line with the Christmas shopping period. The Glasshouse car park fares best in the recorded rise; this could be attributed to its proximity to Argyle Street, one of the main shopping streets in the city centre.

Table 3b[19] **NCP city centre car parks Occupancy**



[18] City Parking (Glasgow) LLP, May 2011
[19] NCP, May 2011

4. ENVIRONMENTAL INDICATORS AND CITY CENTRE INFORMATION

4.1 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 (AEQIs). The city centre is disaggregated into two zones: premier and outlying, and separately scored. Thereafter the scores are accumulated to produce the overall cleanliness index.

The overall cleanliness index scores to date:

- **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).

It should be noted that a score of 66 for a high density urban city centre is at the highest end of the scoring range, and any achievement beyond this score is unlikely.

This section will be updated annually only, when the November city centre survey results are released by Keep Scotland Beautiful.

4.2 Key Performance Indicators (KPIs)

Various indicators are collected at Community Planning level each month, for Clean Glasgow. A summary of those KPIs relevant to the city centre, and covering the Quarter 3 period (as well as data for previous two quarters to provide comparators), are detailed below It should be noted that the figures collated are for the whole of ward 10 which includes Partick/West/Anderston and the city centre.

	Q1	**Q2**	**Q3**
• Square meterage of graffiti removed	5166	6902	5149
• Square meterage of flyposting removed	90	429	41
• Fixed penalty notices for littering (includes cigarette litter)	1701	1413	1013
• Number of school, community and business clean-ups undertaken	18	65	31
• Number of volunteers actively engaged with GCSS	412	188	103

4.3 Crime and antisocial behaviour

Table 4a provides some information on crime, incidents and antisocial behaviour (ASB) during the third quarter (October – December 2010). It should be noted that the data is provided for the City Centre/Merchant City neighbourhood.

Table 4a[20]: Crime/ASB indicators, Quarter 3 City Centre/Merchant City neighbourhood

Indicator	Quarter 3 2010/11 (Oct-Dec)	Quarter 3 2009/10 (Oct-Dec)	+/-	% change
No. of violent crimes	758	813	-55	-7%
Anti Social Behaviour Incidents	2272	2447	-175	-7%
Number of youth disorder incidents	92	122	-30	-25%
Anti Social Behaviour Crime*	1929	2332	-403	-17%

*The City Centre/Merchant City experienced the largest increase in anti social behaviour crimes in quarter 2 of 2010 compared to the same period for 2009.

However for quarter 3 it should be noted that overall ASB crimes decreased by 19% from the previous quarter and by 21% for the same period in 2009. Most encouraging is showing that the largest decrease in ASB crimes was in the City Centre/Merchant City, where ASB crime dropped by 376 incidents from the previous quarter and 403 incidents for the same period in 2009.

[20] Glasgow Community Safety Services, April 2011

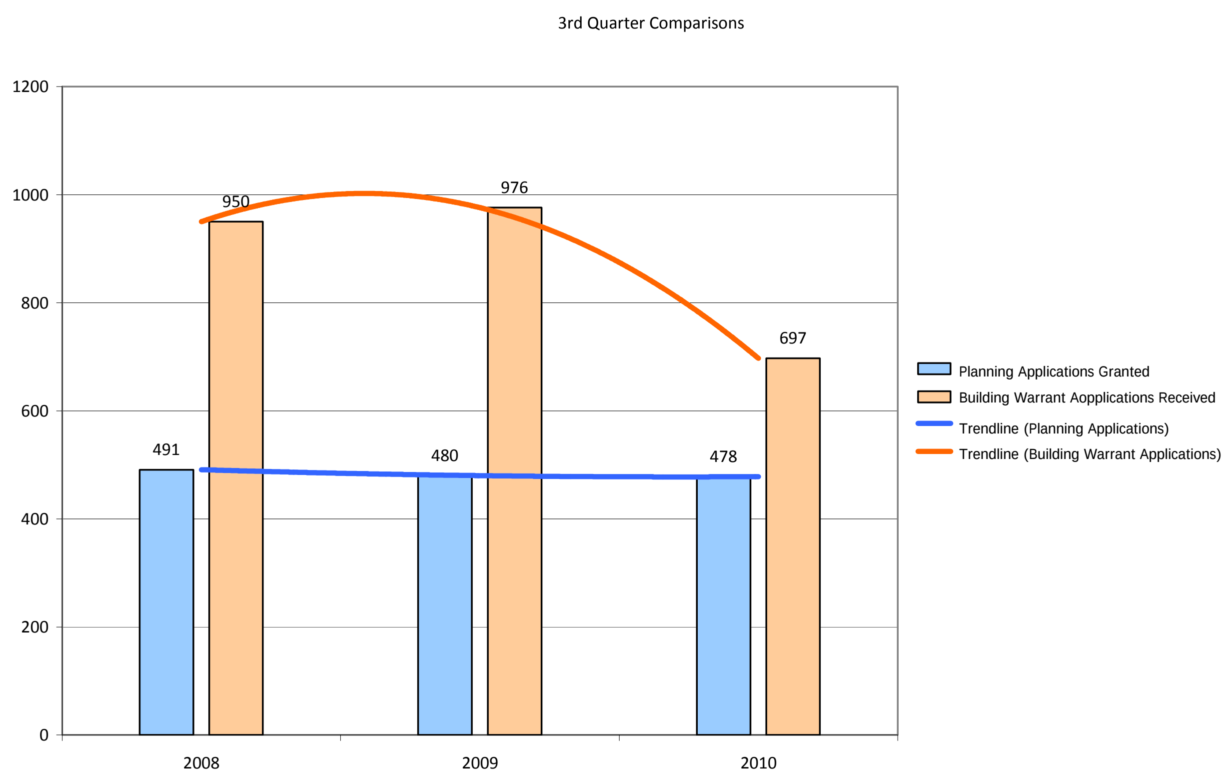
5. PLANNING AND DEVELOPMENT

5.1 Table 5a provides a comparison on planning applications granted and building warrant applications received on a city-wide basis for the third quarter of 2010, and the preceding two years. During quarter 3 period ending in December 2010, Glasgow City Council granted 478 planning applications and received 697 building warrant applications.

For planning applications, this represents a downward quarterly trend on the previous two years with 3 and 2 fewer applications for 2008 and 2009 respectively.

697 Building Warrant applications were received in quarter 3 2010/11 which was 279 fewer than the previous quarter and this is evident from the trend line on the graph too.

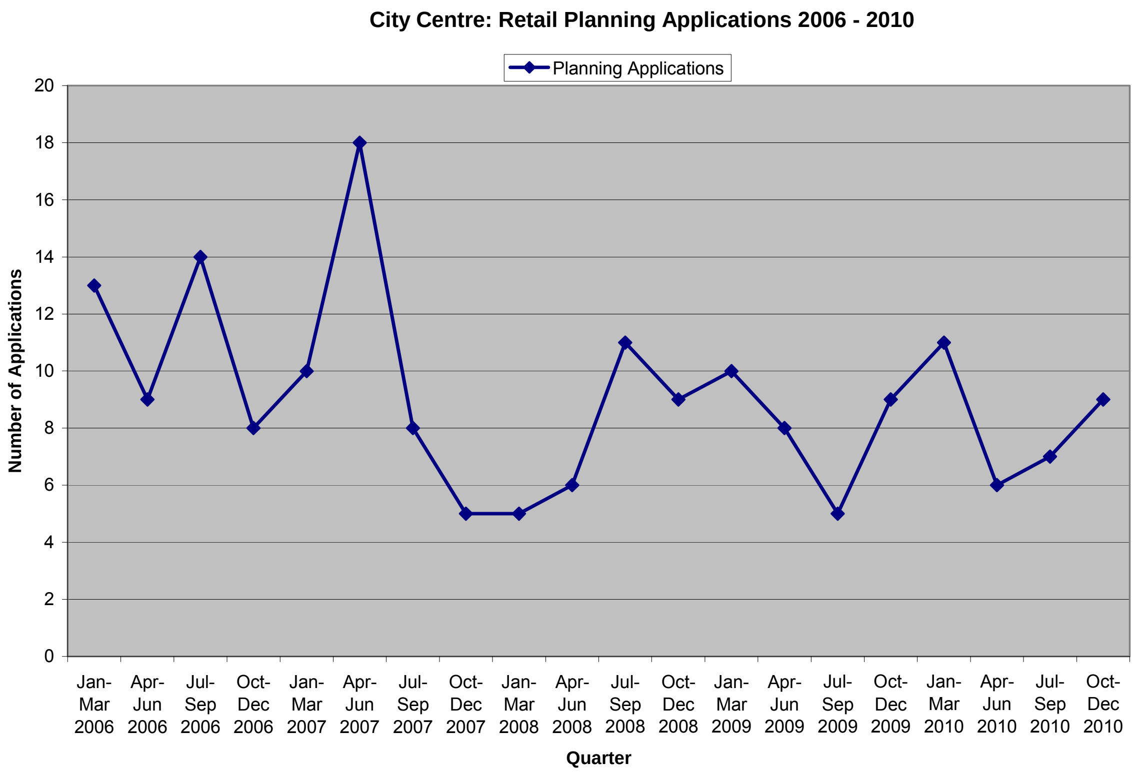
Table 5a[21]: Planning applications granted and building warrants received, Quarter 3 2008/9 & 2010/11



[21] GCC, May 2011

5.2 City Centre Retail Planning Applications

Table 5b[22] illustrates quarterly numbers of retail planning applications since January 2006 until December 2010. The number of retail planning applications has increased slightly during this 3rd quarter which is encouraging in the current tough economic climate and demonstrates a robust developer confidence in the Style Mile and city centre as a whole.



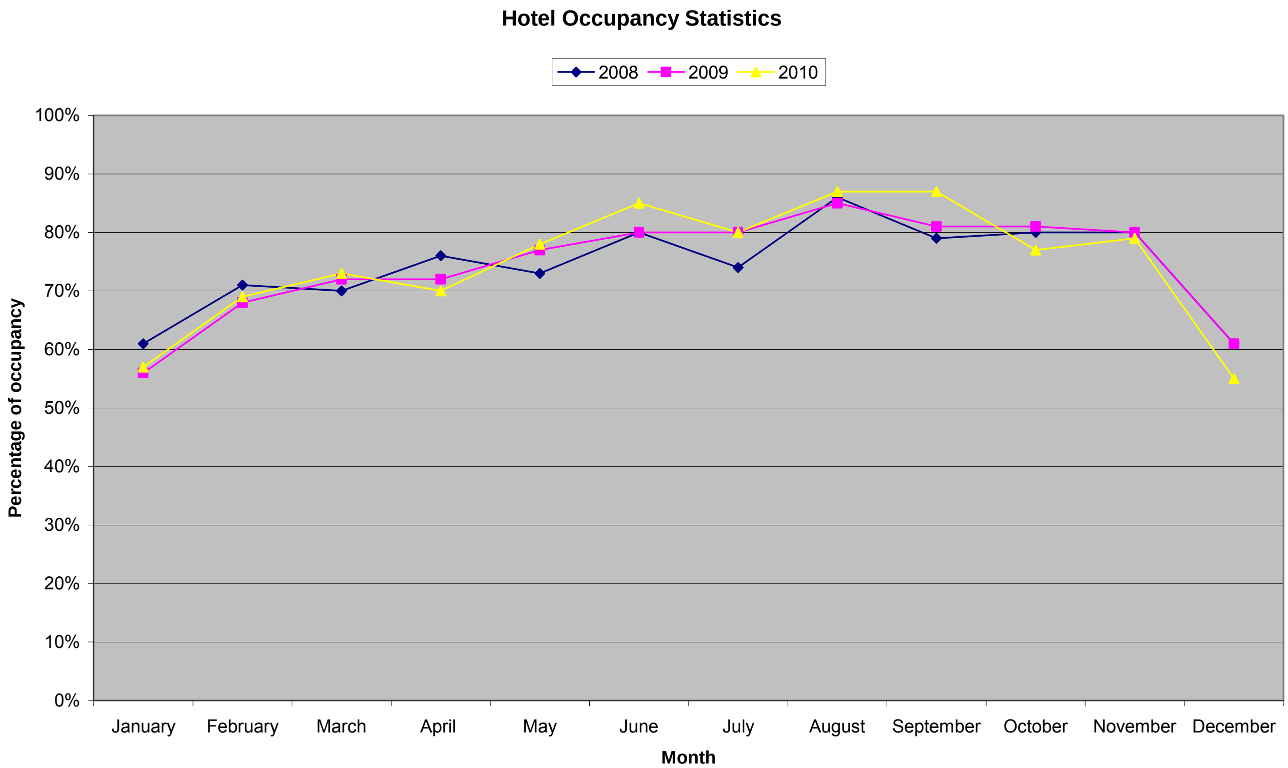
[22] Ibid

6. TOURISM

6.1 Glasgow Hotel Occupancy Rates: January 2008 to December 2010

Data is based on 22 city centre hotels. Quarter 3 2010 shows a dip in all trend lines for 2008, 2009 and 2010, this is generally attributed to a downturn in hotel bookings during the run up to the festive period. Average occupancy rates for this quarter were 70% compared to an average of 74% for 2009 and 2008.

Table 6a[23]: Hotel Occupancy rates

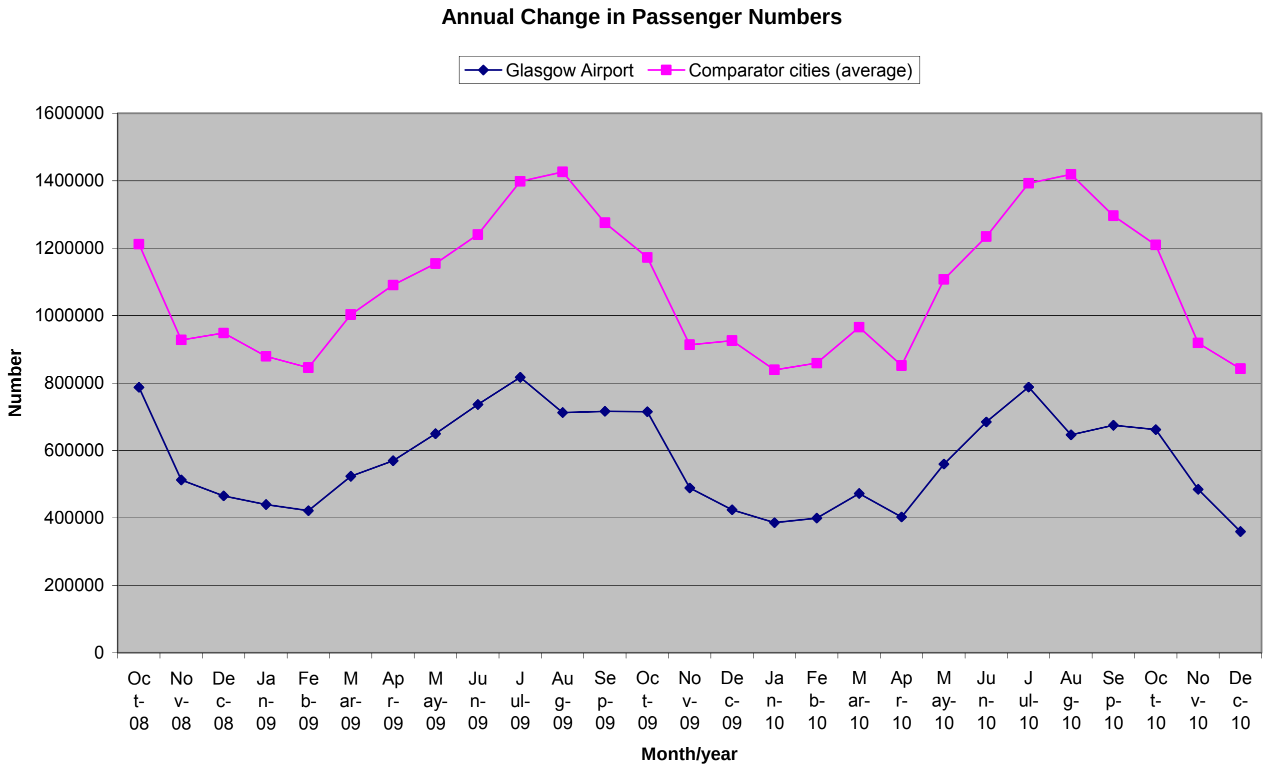


6.2 Glasgow International Airport: Passenger Numbers

Table 6b illustrates the trend and average data from the following comparator cities which include Birmingham, Bristol, Cardiff, Edinburgh, Gatwick, Heathrow, Leeds, Liverpool, London City, London Luton, Manchester, Newcastle, Norwich and Stansted. The table illustrates quarter 3 from 2008 – 2010. As expected Glasgow passenger numbers would form a lower level trend line than the averages of the comparator cities, however it is encouraging to note that it is faring as well as the comparator cities in terms of an almost identical pattern in trend lines, peaking at the most popular holiday times in the calendar year and dipping at the least as would be anticipated.

[23] GGHA City of Glasgow Forecaster – Zone A (provided by GCMB April 2011)

Table 6b[24]: Glasgow Airport Passenger Numbers



[24] Civil Aviation Authority, April 2011

7. SHOPMOBILITY

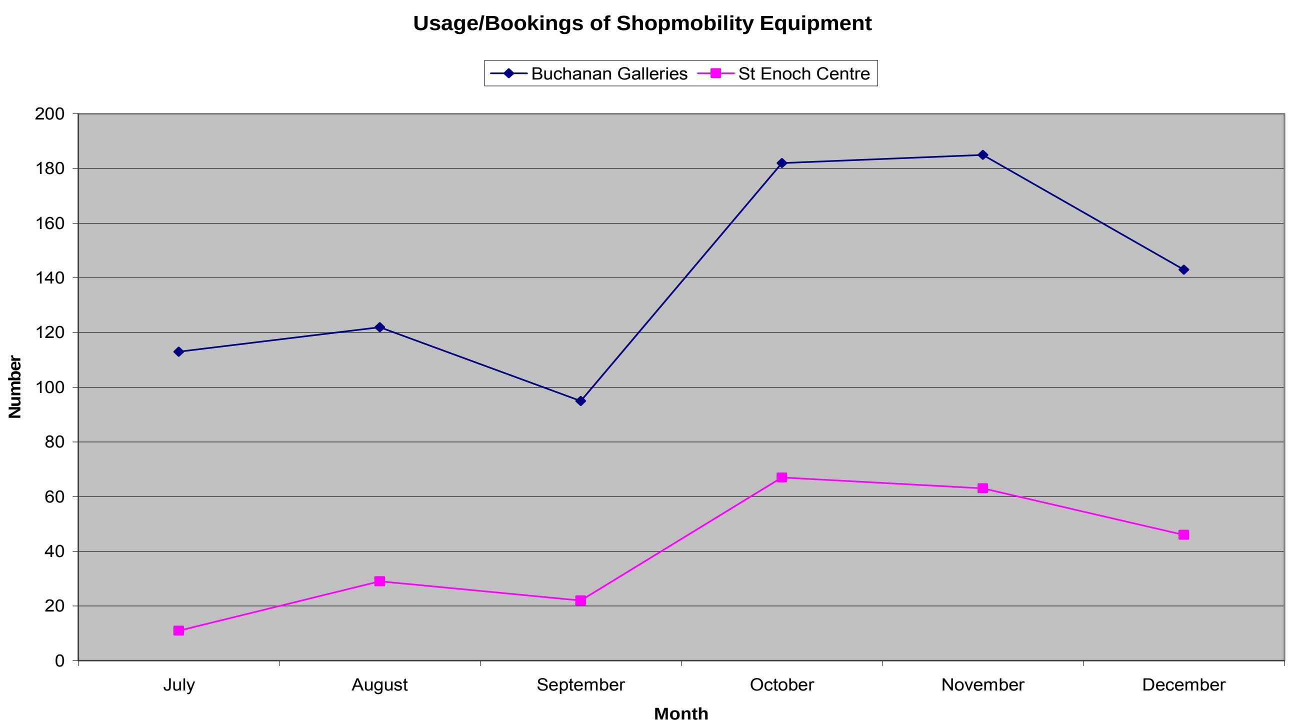
Glasgow Shopmobility offers a free service for people with limited mobility or other impairment who want to access shops and visit leisure spots within the city centre Shopmobility schemes are widely recognised nationally and offer an invaluable form of support for people with some kind of restricted mobility – either through age, accident or disability.

Shopmobility Services include:

- Powered scooters, powered wheelchairs, manual wheelchairs and other mobility aids.
- A "Meet and Greet" service, which involves arranging for staff to be at a city centre transport point with booked equipment.
- Extra assistance – trained staff that have been trained to accompany people while shopping, who may assist in pushing a wheelchair or help people with visual impairment to shop.

7.1 **Table 7a** shows the numbers using/booking shopmobility equipment within Buchanan Galleries and the St Enoch Centre. Bookings can be made for equipment at both locations for use in either of the centres and the surrounding area including the Style Mile. Applicants must register for the scheme in advance of bookings being taken.

Table 7a[25]

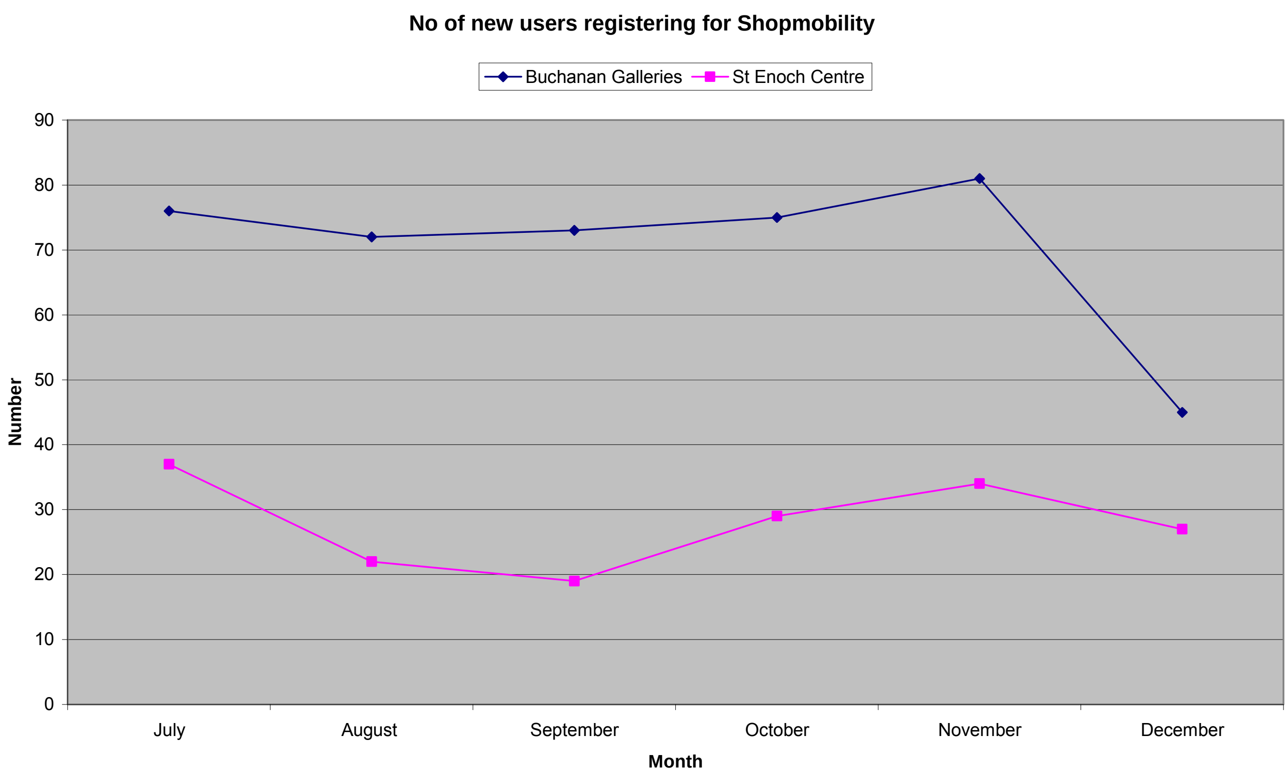


[25] Shopmobility (Maureen McAllister) May 2011

Table 7b illustrates the number of new users who registered for the scheme in Quarters 2 & 3 July – December 2010. A fairly dramatic dip in December was attributed to cancellations from regular users who travel from throughout Scotland to shop in the city centre, who had cancelled trips to the city due to the severe wintry weather conditions experienced during that period. Visitors to the city collect their mobility scooters at bus stations via the "Meet and Greet" scheme, however it was considered unsafe to utilise the scooters during the bad weather.

Car parking charges at the shopping malls is considered expensive and is cited by shopmobility scheme users regularly as a deterrent to visiting the city centre more often, however St Enoch centre has recently seen registrations and bookings increase since bookings can now be taken at the customer service desk. Visitors to the city and using hotel accommodation are now making use of the service during their stay.

Table 7b[26]



[26] Ibid

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