GLASGOW CITY CENTRE ECONOMIC HEALTH CHECK

Welcome to Spring 2012 and the seventh 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 covers the period August – November 2011 and is produced by the City Centre Projects Team based in the Development & Regeneration Services Department.
Please note that all subsequent editions of the Health Check will now be produced and circulated on a bi-annual basis, with editions published in March and September each year. March editions will cover data for the period July – December and September will focus on January – June.

What is the Health Check?
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.

Trends
The table below provides at a glance colour coded trend indicators on a quarterly and annual basis.
Colour codes as follows: 🟢 - signifies improvement 🟠 - amber relative stability 🔴 - red decline

Indicator	July - November	Annual trend	Comment
Footfall	🟢	🔴	ATCM High Street Index - August 2011 - Glasgow's peak so far this year
Vacant units	🟢	🟢	Vacancy rates in city centre down from 12.7% - 8.9%
Cleanliness	🟢	🟢	Highest score and most fixed penalty notices for litter issued
Crime	🟢	🟢	Significant reduction in youth disorder and ASB slight increase in violent crime up 1.2%
Planning	🟢	🟢	Planning applications again up against same period last year
Building Warrants	🔴	🔴	Building warrant applications overall down on same period last year
Retail Applications	🟢	🟢	Retail applications up on same period last year
Tourism	🟢	🔴	Although annual trend is down this is a very marginal decrease in hotel occupancy from 74.7% to 74.6%

Section	**Contents**	**Page**

Style Mile: Background and Area Map

The "Style Mile" relates to the square mile in the very 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 Glasgow Scotland with Style (www.seeglasgow.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, which monitors by comparison spend, recently published its most up to date Retail Footprint 2011[1] top ten rankings based on retail forecast expenditure (£m**).** Their findings continue to show Glasgow remaining in 2nd place, although Birmingham have improved and are not too far behind!

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

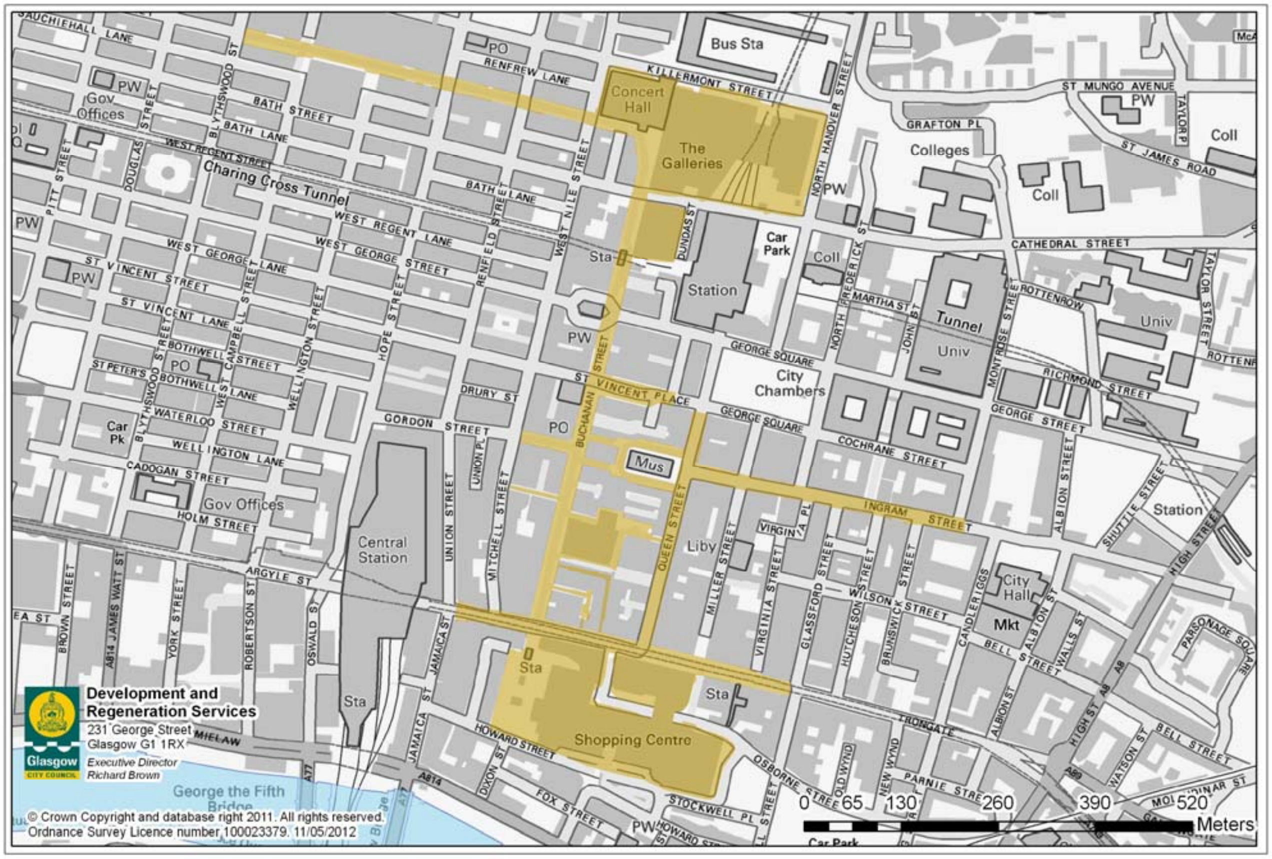
CACI's research also considers Glasgow to be 8th in the **Top 10 Resilient Centres[2]**

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

[1] CACI Press Release 16 June 2011

[2] Source: British Marketing Survey © The BPS 2011 - All Rights Reserved

Style Mile Map



1. FOOTFALL

1.1 Style Mile footfall

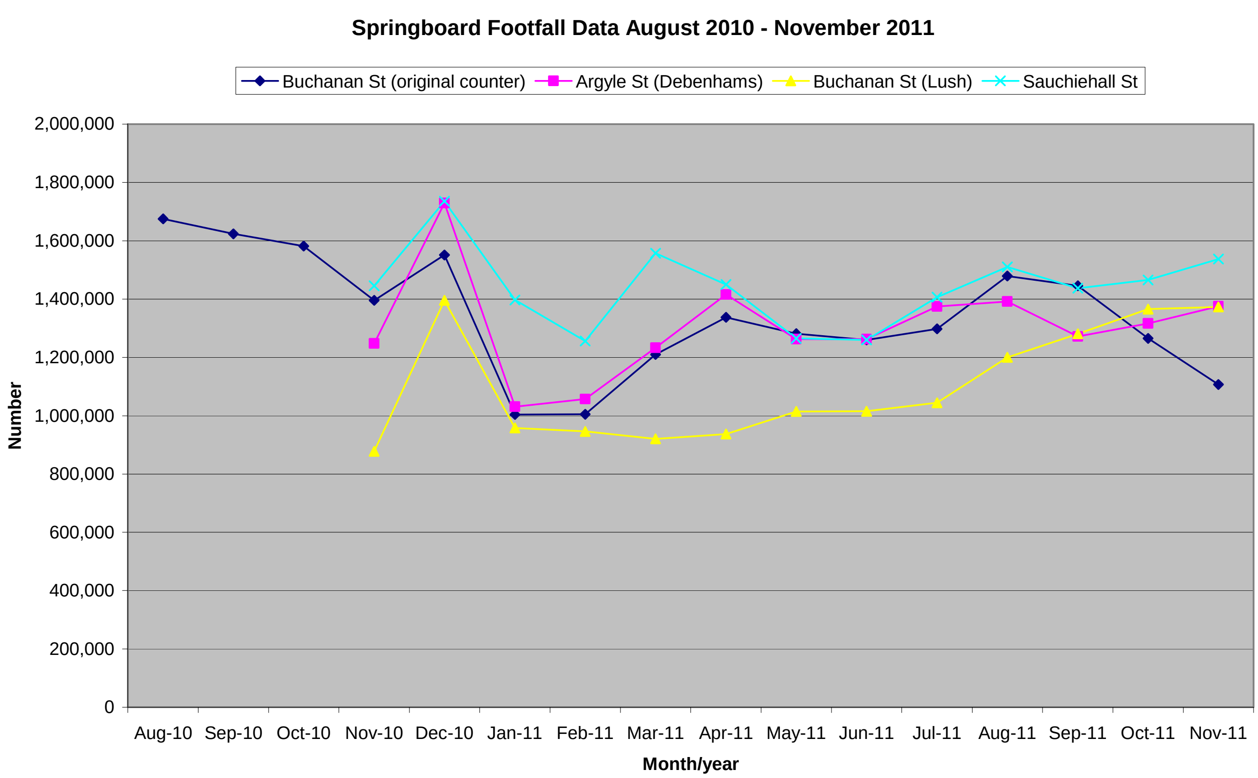
The Style Mile footfall monitor is based on statistics which Glasgow City Council accesses through Springboard's Customer Counting and Measurement system. Springboard registers foot flow at designated counters located throughout the Style Mile. There are four counters throughout the Style Mile and those are located as follows:

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 the Springboard footfall counters. The chart shows the period August 2010 – November 2011. *Please note that the additional counters did not become operational until November 2010.*

Counters record the foot flow over the **24** hour period, therefore registering both day and night time economy. According to the chart below all of the counters recorded their peak during November/December in 2010. This is always traditionally a busy period attributed to the festive shopping and entertainment activity during November/December. Sauchiehall Street comprises the most number of pubs, clubs and theatres in the city centre therefore consistently charts the highest foot flow trend-line as it includes night time economy.

Table 1a



[3] Springboard, April 2012

Table 1b[4] illustrates the trend in foot flow for the original Buchanan Street counter. Although the trend indicates a sharp decline in footfall from December 2010 to its lowest point in January and February 2011, this is anticipated as people recover from additional spending during Christmas and New Year, as expected it rises and peaks at the busy shopping periods around the Easter holidays and again around the school holidays.

Table 1b

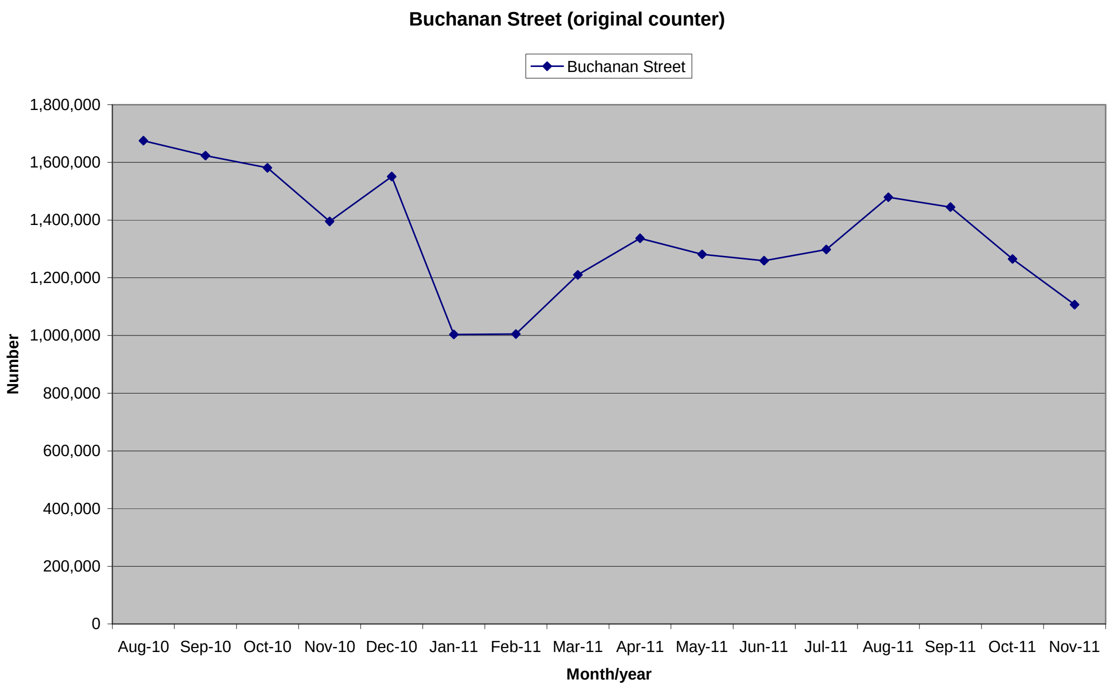


Table 1c[5] provides a detailed chart comparing Glasgow's average against all towns and cities and regional cities from January 2011 – December 2011. Glasgow's trend-line more or less mirrors the pattern of the other comparator cities, except for its substantial peak in August 2011, coinciding with the end of school holiday period. Again all recorders experience an increase with the onset of Christmas shopping.

[4] Ibid
[5] ATCM Springboard National High Street Index – Glasgow – Average – December 2011

Table 1c

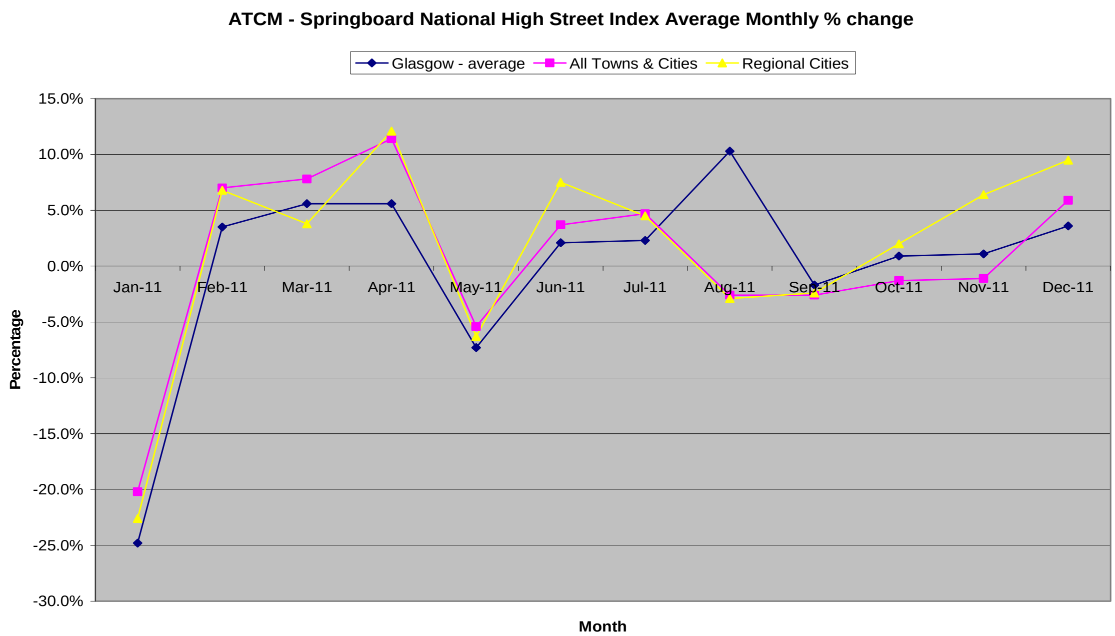
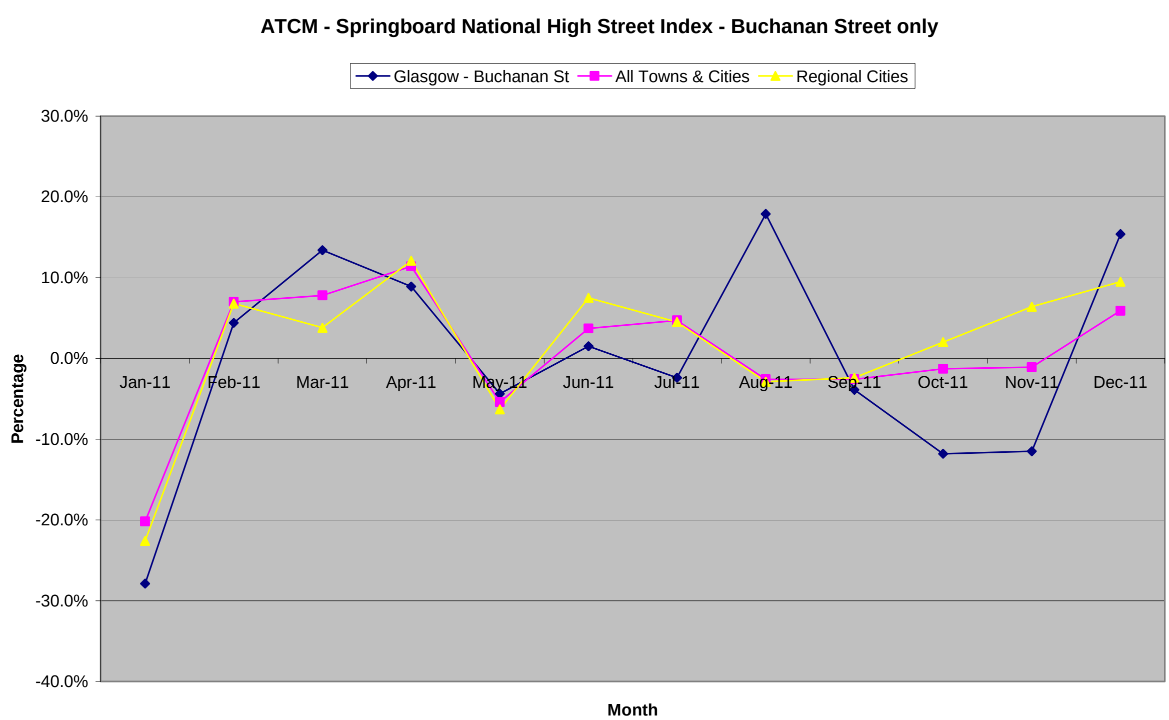


Table 1d[6] illustrates average for Buchanan Street only. Both sets of figures are based on the National High Street Index which is collaboration between Springboard Research Ltd and the Association of Town Centre Management (ATCM) to present a national performance index based on footfall in towns and city centres.

Table 1d

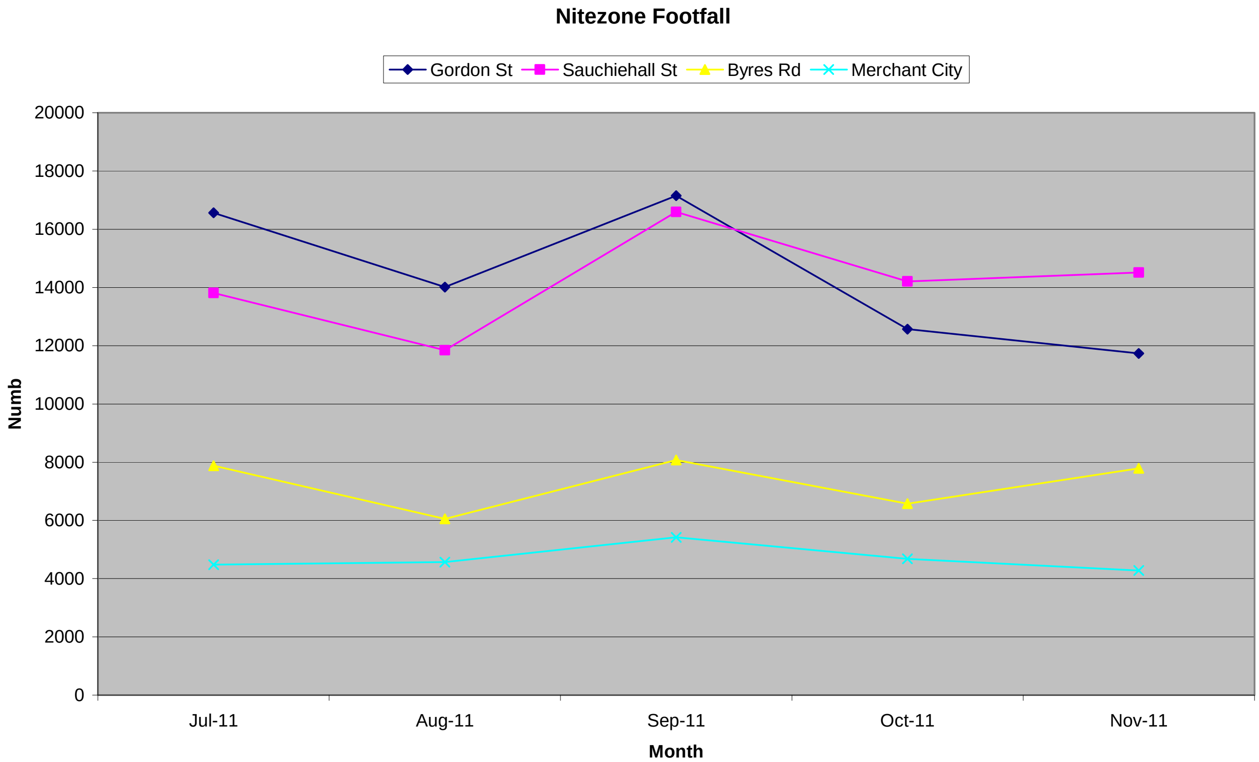


[6] ATCM Springboard National High Street Index – Buchanan St – Average – December 2011

1.2 Nitezone footfall

Table 1e[7] illustrates comparative Nitezone footfall figures for July – November 2011. The figures relate to Gordon Street, Sauchiehall Street, Merchant City and Byres Road. The figures are collated by taxi marshals who are present at the designated taxi pick up points between 10 pm and 5 am every Friday and Saturday night to ensure the efficient, safe exit out of the city for users of the night time economy (map showing position of sites is available via www.glasgow.gov.uk/residents/business/citycentre). Merchant City is the latest location to be added to the scheme however as expected being a peripheral city centre spot, records the lowest numbers utilising this designated area.

Table 1e



1.3 ATCM Night Time Economy Index Reports

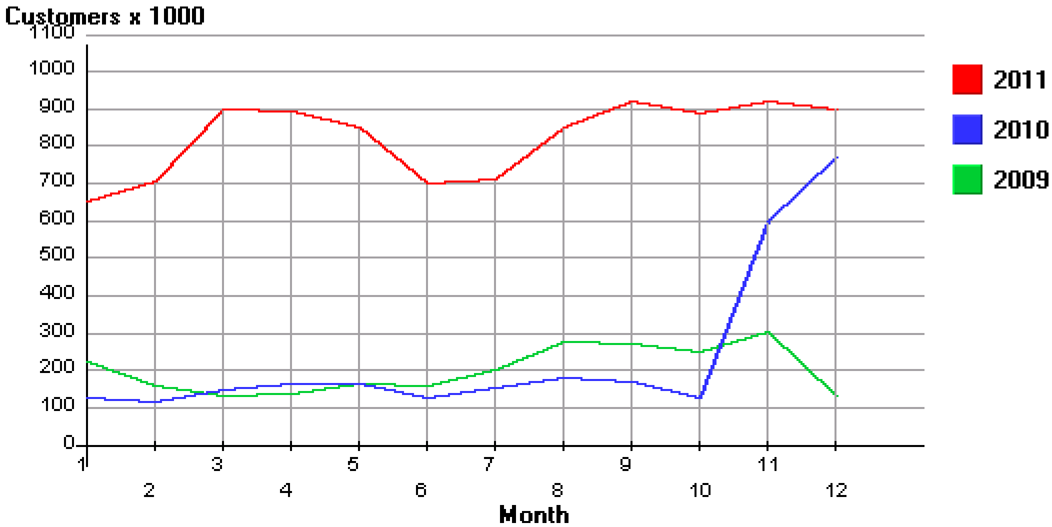
ATCM-Springboard collates statistics on Night Time Economy Index which focuses on the UK's high street footfall during the hours from 6 pm – 4 am. Statistics overall for UK's high streets in July 2011 showed an increase of 1.6% from previous July, August remained unchanged at 0.0%, however the annual change for September was +2.8% which was the second highest recording in 2011 (+3.3% was recorded in April)[8].

ATCM-Springboard stated "this year's positive result is undoubtedly due to the unexpected heat wave during the last week of the month when footfall increased by 11.9%[9].

[7] GCSS April 2012
[8] ATCM-Springboard Night Time Economy Index September 2011
[9] Ibid

Table 1f[10] shows the last 3 years Night Time Economy figures for Glasgow up to end of December 2011. It's very encouraging to note that 2011 shows the highest recorded night time economy figures over the last 3 years.

Table 1f



1.4 SPT Footfall

SPT have thirteen reporting periods in which they collate Subway footfall data based on numbers boarding (going through the barrier). **Table 1g** demonstrates positive results for St Enoch Subway station with an overall increase in footfall during 2011 (i.e. periods 1-9) when compared with similar periods in the previous 2 years. There was a slight dip in footfall at St Enoch in period 9 and this could be attributable to the extreme adverse weather including high winds around 8 and 9 December 2011, where the Met Office advised people not to travel, following which many schools and businesses took the decision to close early.

As can be seen in **Table 1h** Buchanan Street Subway station records a much higher footfall than St Enoch Subway station and the overall footfall for Buchanan Street for 2011/2012 was higher between periods 1-9 than it was during the same periods in 2010/2011. There was a decrease in footfall figures for Buchanan Street in periods 8 and 9 and while the weather could have had an affect in period 9, there were also less football matches played at Ibrox in period 8 and this reduction in football traffic may have contributed to the decrease in footfall figures too.

[10] Springboard, April 2012

Table 1g

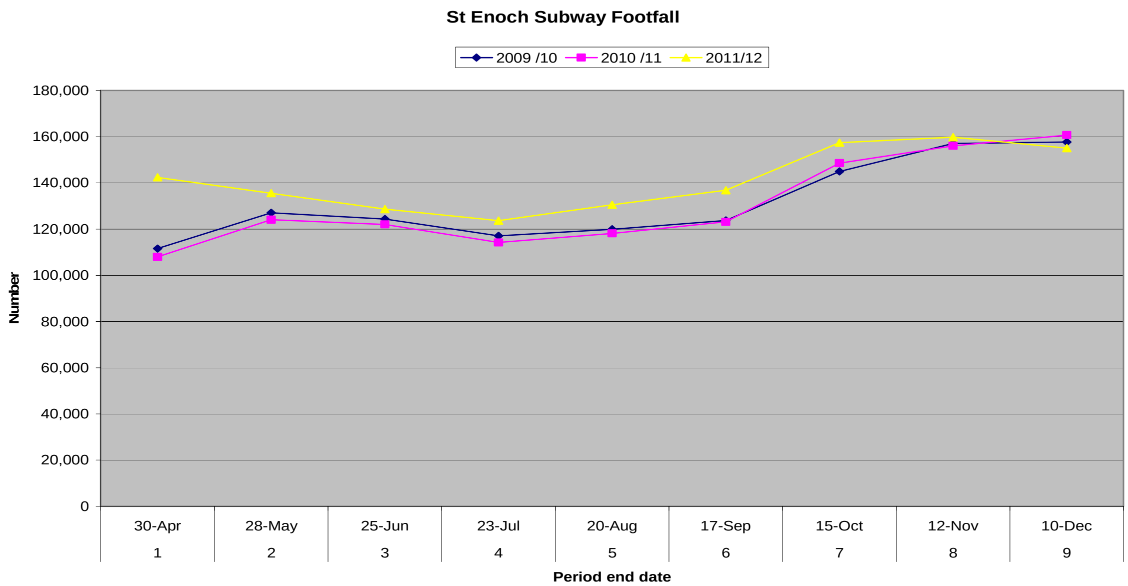


Table 1h

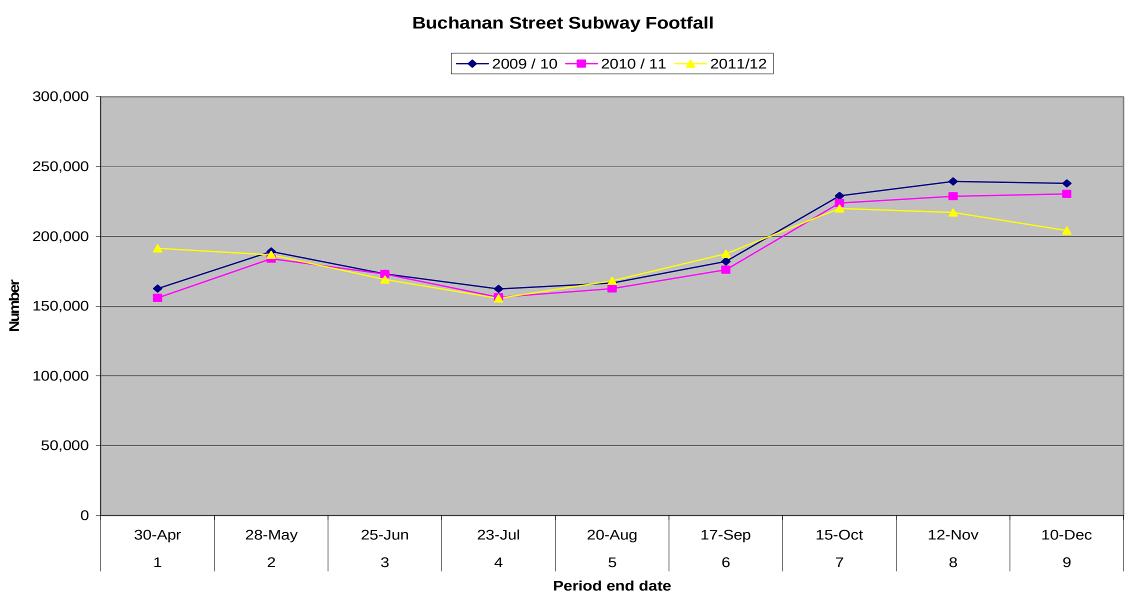
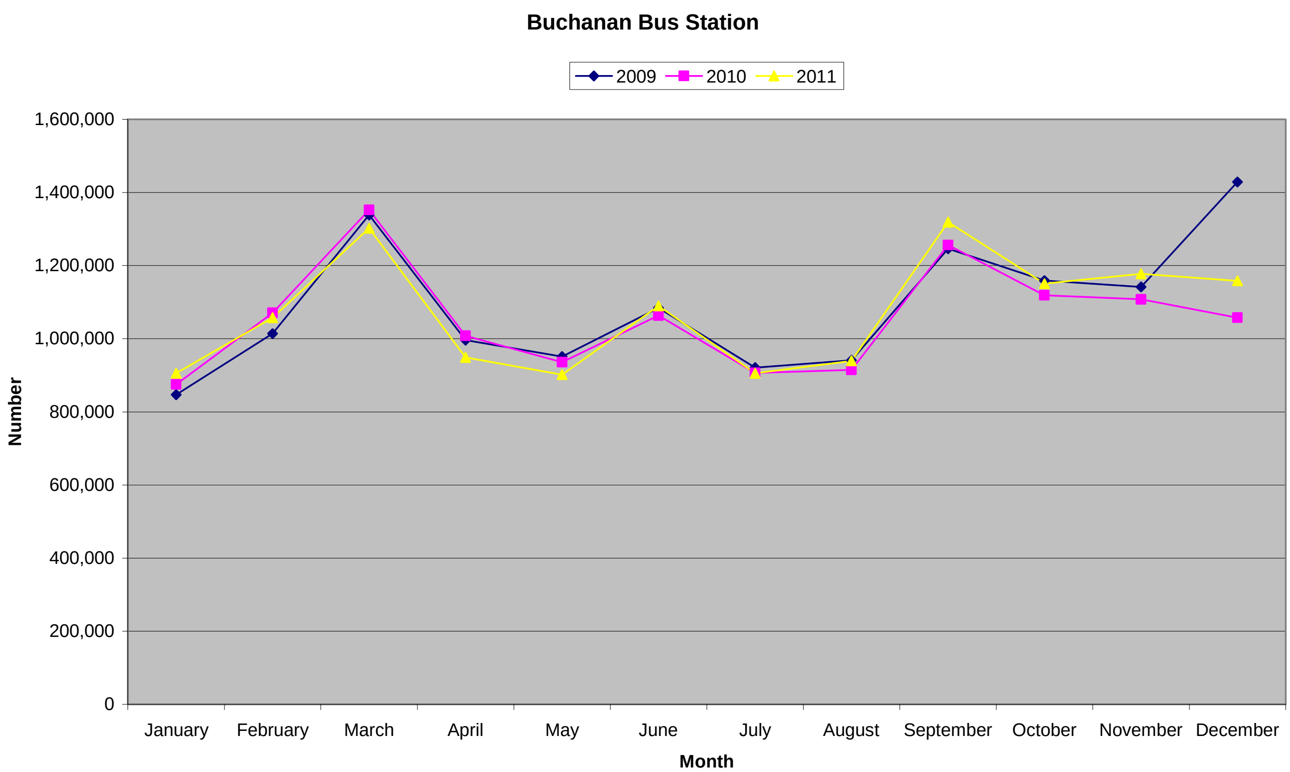


Table 1i[11] illustrates the footfall at Buchanan Bus Station. During the 4 months of January, June, September and November 2011, the footfall for Buchanan Bus Station has surpassed the totals for the same months in 2009 and 2010.

Table 1i Footfall: Buchanan Bus Station

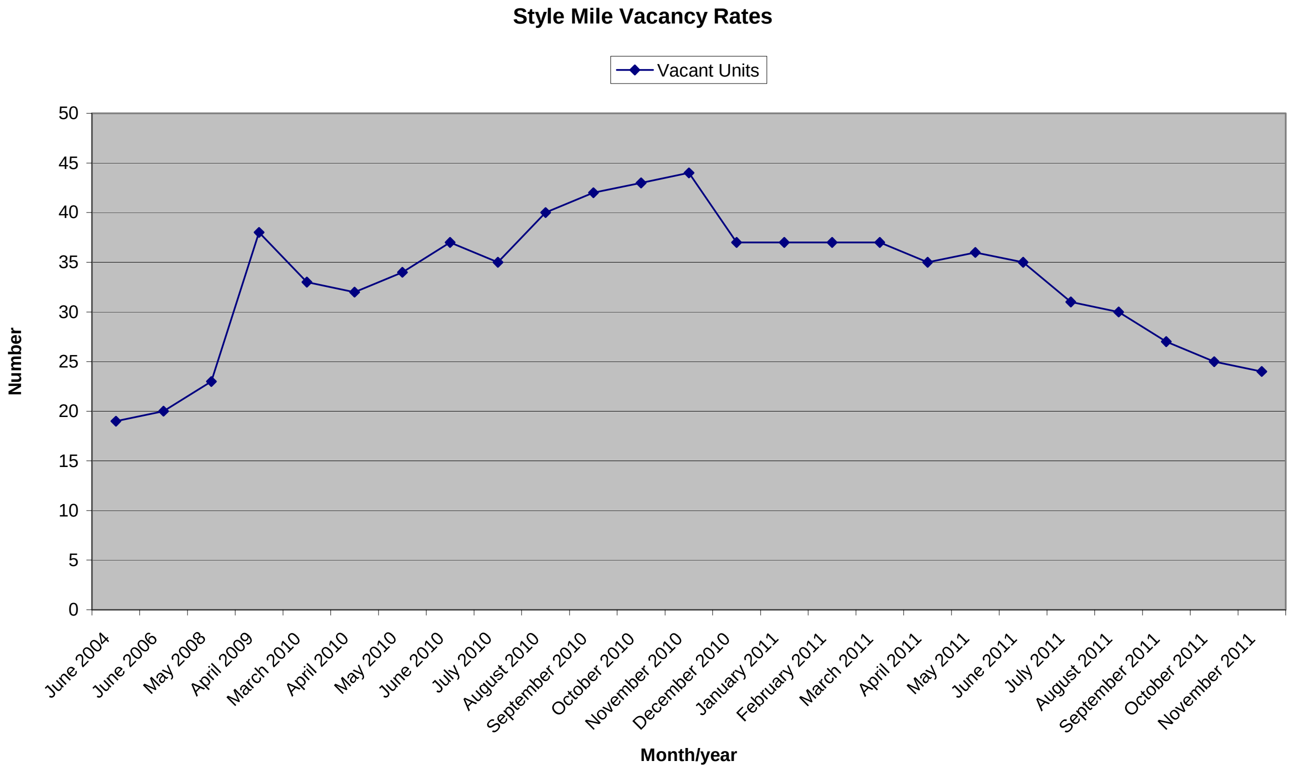


[11] Ibid

2. VACANT UNITS (STYLE MILE)

Table 2a[12] 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 were recorded. The chart records the number of vacant units at street level and includes Class 1 (shops), Class 2 (financial, professional and other services – eg banks, Class 3 (Food and drink – eg cafes and restaurants) and Sui Generis (not in any "use class" eg pub or hot food takeaways). These figures do not include vacant units within the shopping centres on Glasgow's Style Mile.

Table 2a



Vacancy rates in Glasgow's Style Mile at street level and including those within Buchanan Galleries, St Enoch Shopping Centre and Princes Square fell from 12.7% in January/February 2011 to 8.9% in November 2011[13] - a good result given the current economic climate.

Aggregates	November 2011		February 2011	
	Units	%	Units	%
Occupied	509	91.1%	497	87.3%
Vacant	50	**8.9%**	72	**12.7%**
Total	559		569	

[12] GCC April 2012
[13] GCC April 2012

3. VACANT SITES (CITY CENTRE)

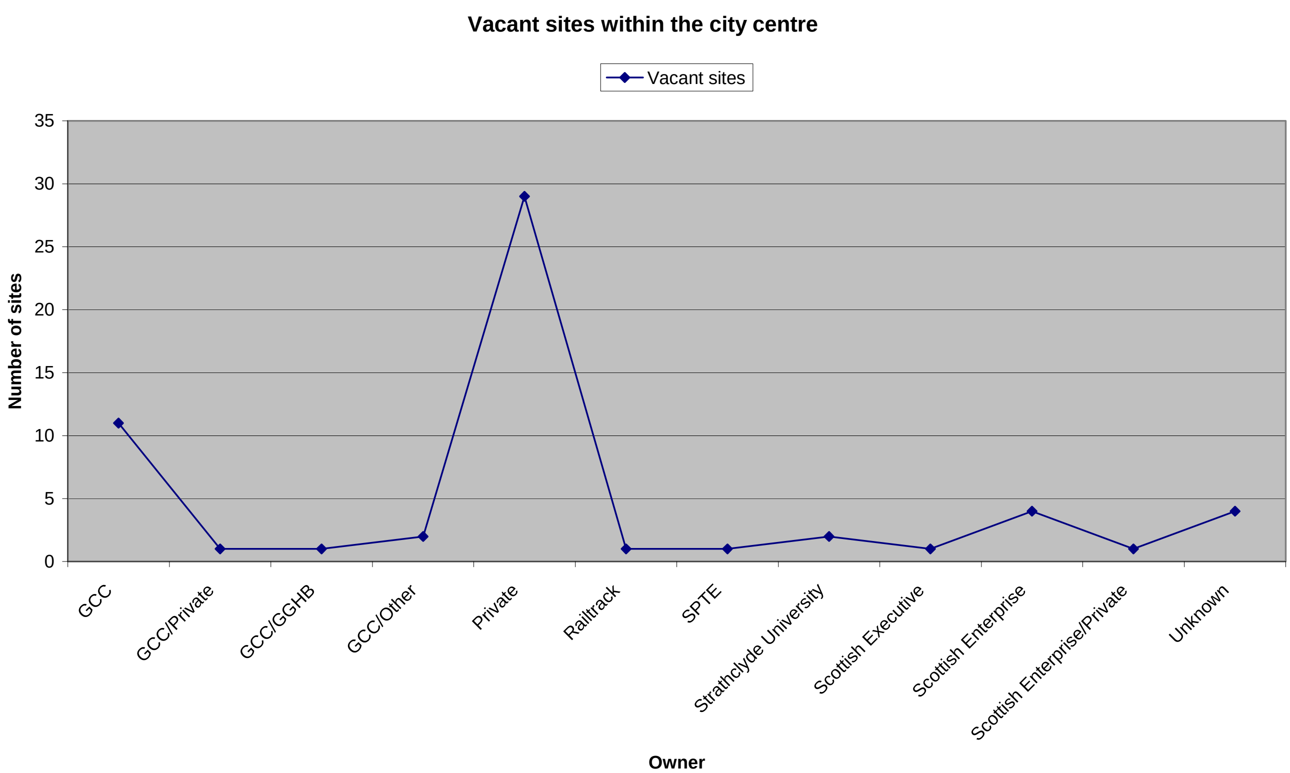
Table 3a[14] provides an annual survey for 2011 of city centre vacant sites and derelict land, and their specified ownership. The following definitions apply:

- **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

All sites between Kingston Bridge and High Street should be included in the graph. In total there are 58 identified sites.

As the graph below indicates, the majority of sites are privately owned. Their potential land use is a mix of uses 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 1 site less than those recorded in 2010.

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



[14] 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. City Parking recently temporarily increased their portfolio adding a small outdoor car park in Albion Street, however this is now a development site and therefore no longer operational as a car park.

Table 4a[15] illustrates the number of daily entries for each of the sites per month from April – November 2011. Concert Square is the most utilised which would be expected given its proximity to Buchanan Street and the Royal Concert Hall, with Cadogan Street showing the lowest occupancy rates as it is located on the edge of the city centre.

Table 4a: City Parking Occupancy

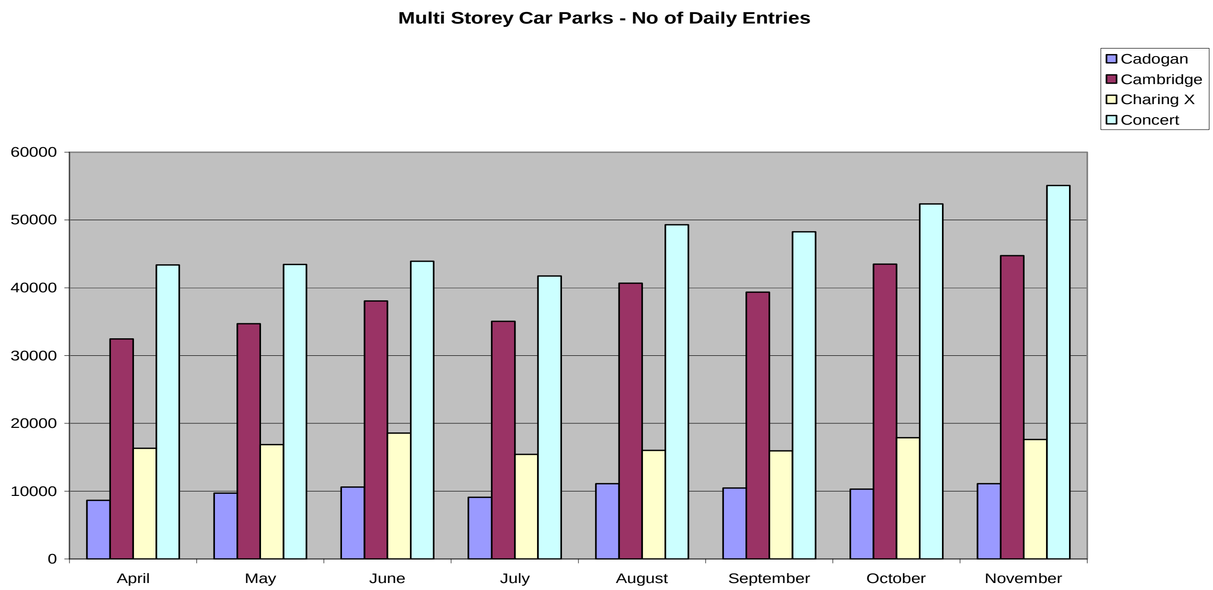
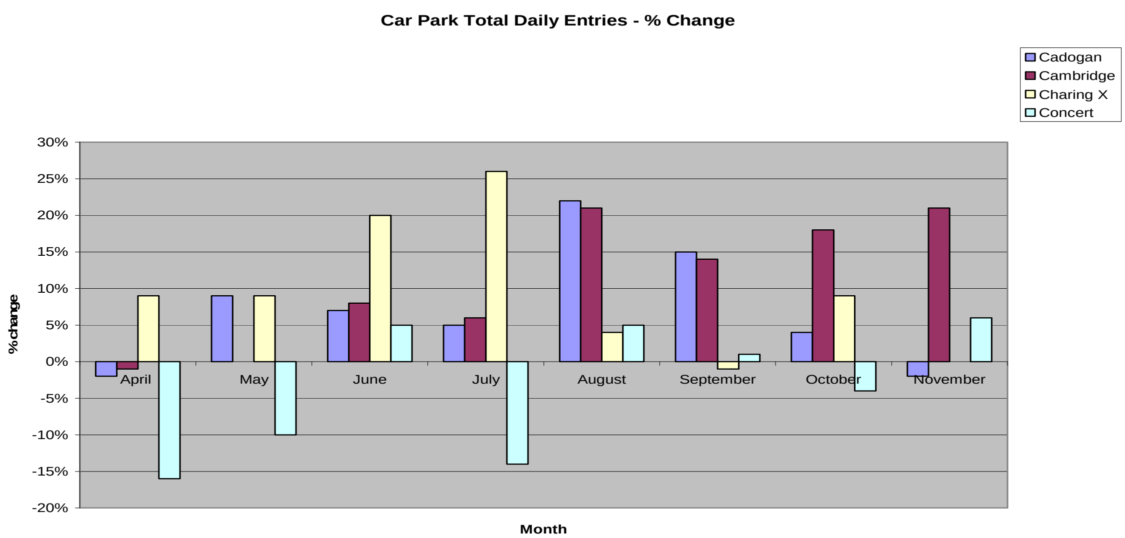


Table 4b[16] demonstrates the percentage difference change in occupancy rates against the same period last year.



[15] City Parking (Glasgow) LLP, April 2012

[16] Ibid

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 (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.

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

- **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 unfortunately 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.

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. It also is encouraging noting that despite fewer Community Enforcement Officers covering the city centre due to limited resources the score has well exceeded the previous city-wide scores.

5.2 Key Performance Indicators (KPIs)

Various indicators are collected by Glasgow Community Safety Services (GCSS). These form part of their strategic vision and are grouped under three key headings, **Safer, Cleaner, Better.** Below is a summary of those KPIs relevant to the city centre, and covering July – November 2011[17]. Please note that figures collated incorporate Partick West, Hillhead and Anderston City.

	2011 (Jul– Dec)	**2010 (Jul-Dec)**
• Square meterage of graffiti removed	11021	Not available**
• Square meterage of flyposting removed	275	Not available**
• Fixed penalty notices issued (includes flytipping, dog fouling, & litter)	3341	2250
• Number of school, community and business clean-ups undertaken*	30	96
• Number of volunteers actively engaged with GCSS through ECAT[18]	221	289

*MacDonald's Restaurants involve themselves in community clean ups and also employ their own litter person on a full time basis to clean up any litter outside all their premises in Glasgow and also while travelling between stores.

** Only city-wide stats available due to administrative issues therefore not been included as does not permit any accurate comparison.

[17] GCSS May 2012

[18] ECAT - Environmental Community Action Team

5.3 Crime and antisocial behaviour

Table 5a[19] provides some information on crime, incidents and antisocial behaviour (ASB) during July – November 2011. The table also shows the figures for each category for the same period in 2010 and all but violent crime statistics have fallen. 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. The population of the entire area is 82,500, or over 14% of the total city population. This makes it the largest local CPP in the City by population size.

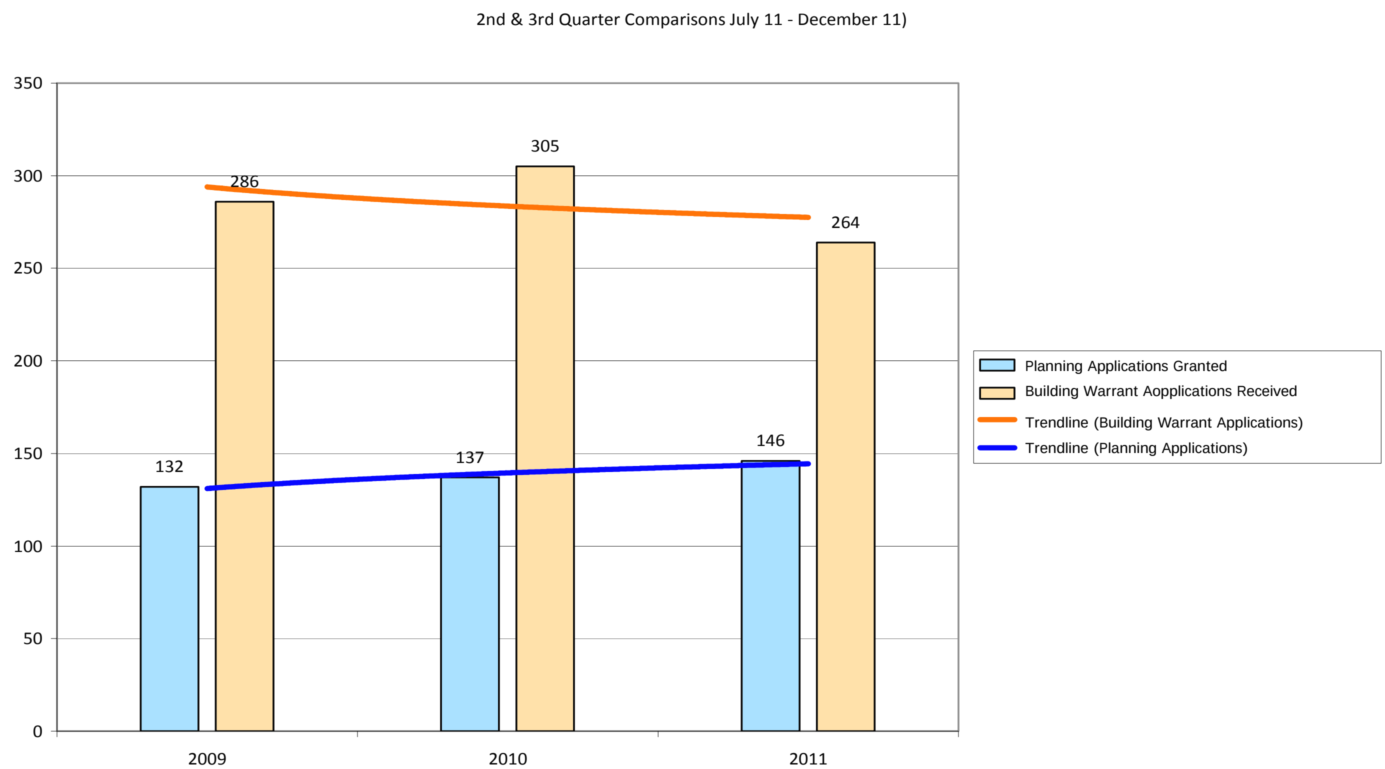
Table 5a:
Crime/ASB indicators, July – November LCPP Central & West neighbourhood

KPI Type	July 2010 – November 2010	July 2011 – November 2011	+/-	% change
ASB INCIDENTS	**7436**	**7199**	- 237	-3.1%
YOUTH DISORDER	**868**	**657**	- 211	-24.3%
ASB CRIME	**5856**	**5611**	- 245	-4.1%
VIOLENT CRIME	**1558**	**1577**	+ 19	+1.2%

[19] Source: Strathclyde Police April 2012

6. PLANNING AND DEVELOPMENT

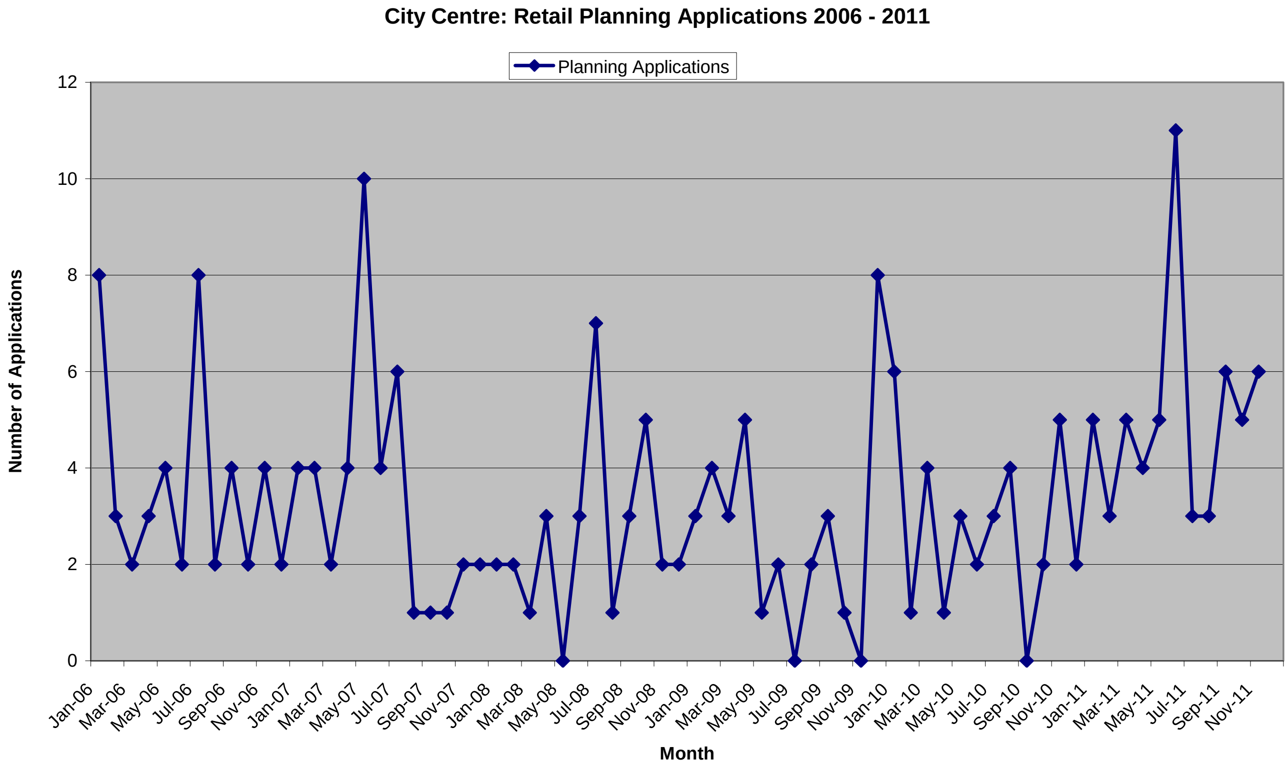
Table 6a[20] provides a comparison on planning applications granted and building warrant applications received on Ward 10 Anderston/City centre basis for the 2nd and 3rd quarters July – December 2011. Between July and December 2009 **132** Planning applications were granted, and this increased to **146** in 2011. **286** Building Warrant applications were received in 2009 compared to **264** in 2011.



[20] GCC April 2012

6.2 City Centre Retail Planning Applications

Table 6b[21] tracks the quarterly numbers of retail planning applications approved since January 2006 – November 2011. The number of retail planning applications has increased from this quarter from 9 to 13 which despite the current economic climate suggests a comparable level of activity to the same quarter of 2006 pre-recession. It is encouraging to note that while numbers dipped quite dramatically in Q1 2010, since then they have shown a steady continuous increase in the trend line which perhaps reflects more confidence in market stability and development with the current number of applications sitting higher than the last peak in June 2007.



[21] Ibid

7. TOURISM

7.1 Glasgow Hotel Occupancy Rates

Please note that data collated is based on 22 city centre hotels. **Table 7a** illustrates the hotel occupancy rates for July - November over 4 year period 2008 – 2011. The 2011 trend line follows a similar pattern to the previous 3 years.

Recent hotel investments in the city include the completion of the £10m Blytheswood Hotel at Blytheswood Square, the new citizenM hotel on Renfrew Street, and a major refurbishment of the Grand Central Hotel at Gordon Street.

Table 7a[22]: Hotel Occupancy rates

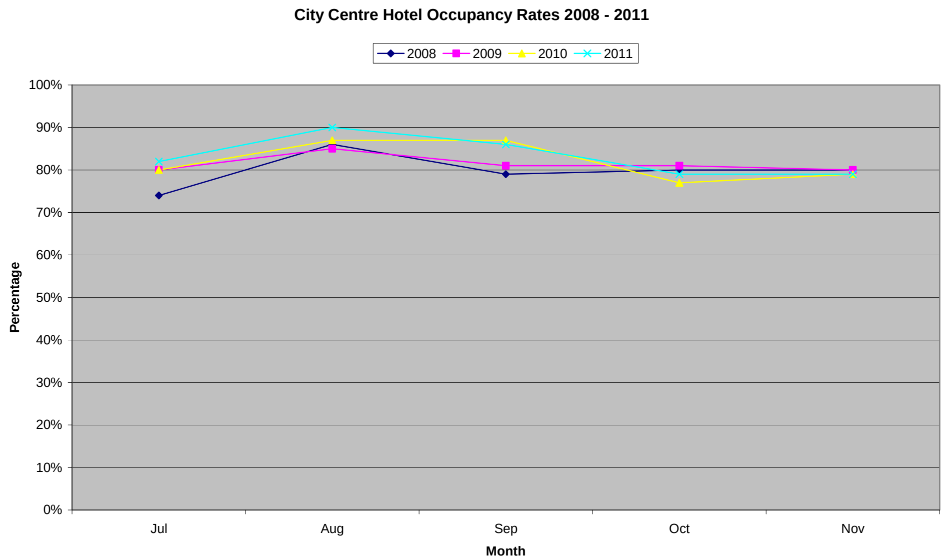
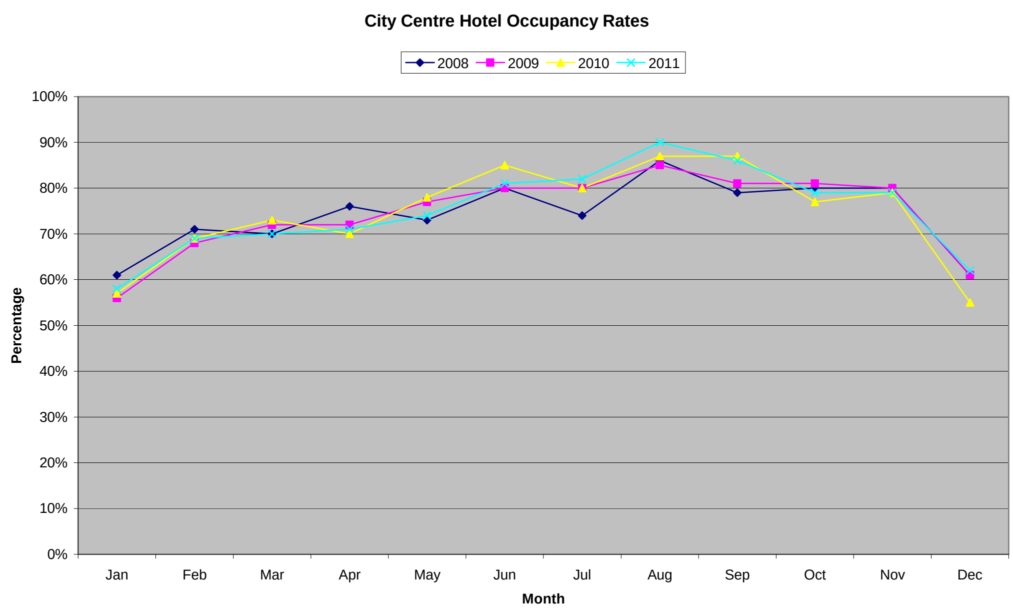


Table 7b[23] illustrates the annual trends from January 2008 – December 2011, with average occupancy rates as follows: 2008 – 74.3%, 2009 – 74.4%, 2010 - 74.7% and 2011 – 74.6%.



[22] GGHA City of Glasgow Forecaster – Zone A (provided by GCMB April 2012)
[23] Ibid

7.2 Tourist Surveys

Around 400 people are surveyed per quarter and this is carried out by Lynn Jones Forecasting using the Visitract online survey system. Email addresses are taken from visitors and then followed up with an online questionnaire. The addresses are captured from visitors in different locations throughout the city though these tend to be city centre and west end due to the majority of visitor attractions being located in these areas, therefore the results below can't be tied strictly to city centre only.

The following statistics were collated based on the online survey.[24] Please note that a score which is below 8 is considered to be below standard. The first column focuses on period 1 April – 30 June 2011 and the second column shows the average scores up to the end of November 2011.

	1/4/11 – 30/6/11	**1/7/11 – 30/11/11**
No. of nights	Ave 2.74	Ave 2.58
Quality rating of accommodation	32% 3 star 31% 4 star 14% didn't know 9% 5 star	29% 3 star 33% 4 star 18%didn't know 7% 5 star
Rating of customer service in visitor attractions	Ave 8.55	Ave 8.56
Rating of customer service in restaurants/cafes	Ave 8.34	Ave 8.23
Rating of customer service in pubs	Ave 8.29	Ave 8.03
Rating of customer service in Visitor Info Centre	Ave 8.42	Ave 8.28
Rating of customer service in shops	Ave 8.29	Ave 8.18
Rating of customer service in transport	Ave 7.86	Ave 8.17
Rating of customer service in accommodation	Ave 8.38	Ave 8.25
Rating of customer service in performing arts venues	Ave 8.41	Ave 8.7
Rating of cleanliness	Ave 7.23	Ave 7.13
Rating of safety	Ave 7.58	Ave 7.53
Rating of value for money	Ave 7.40	Ave 7.55
Rating of Glasgow overall	Ave 8.24	Ave 8.21

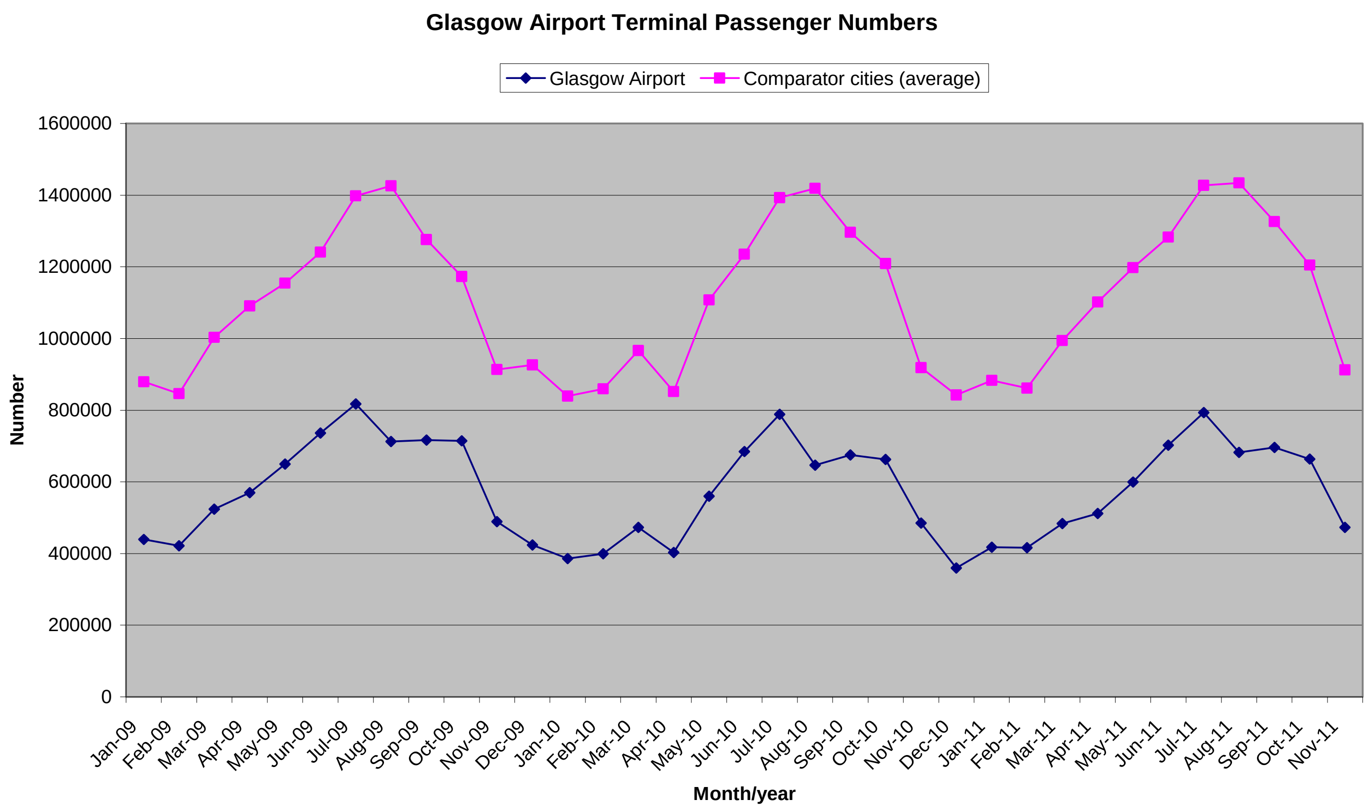
[24] Lynn Jones Forecasting figures provided by GCC December 2011

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 over £200 million has been invested which includes the £31 million terminal extension[25]. 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[26] illustrates how Glasgow International Airport is comparing to 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.

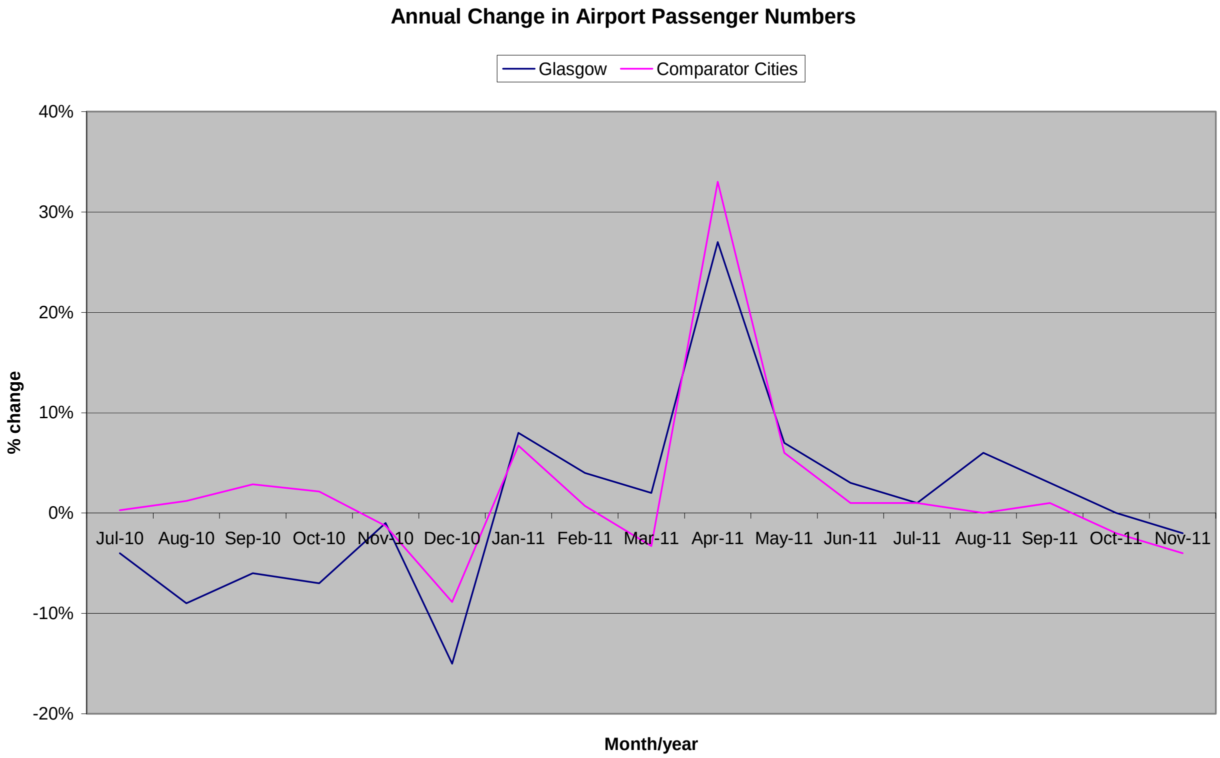
Table 7c



[25] CAA website accessed May 2012

[26] Ibid

Table 7d[27] shows the annual percentage rate changes for Glasgow against the average of the same comparator cities mentioned above. The trend lines follow a very similar pattern where the peaks and troughs are occurring in Glasgow at the same periods as they affect the comparator cities.



[27] Ibid

8. SHOPMOBILITY

Glasgow Shopmobility was set up to support people with mobility issues to be able to access shops and services in Glasgow city centre. Once registered the service is free to use. Until 30th November 2011 the facility was available in Buchanan Galleries and St Enoch's Shopping Centre however since the closure of the shopmobility project equipment has only been available on loan within the St Enoch Centre. There are currently no other facilities to assist disabled and elderly people access services and shops operating within the city centre. Shopmobility is located on the ground level at the Customer Service Desk in the St Enoch Centre, Argyle Street, Glasgow, and is available from 10am - 5pm.

Due to the change in service no statistical information on number of users and number of new registrations are currently available for the period July – November 2011.

9. “Good News” stories relating to Glasgow City Centre

The links below provide some interesting news stories relating to the City Centre:

Four new prelets at Buchanan Street (27 Jan 2012)
http://www.propertyweek.com/news/news-by-region/scotland/landsecs-agrees-four-new-prelets-at-buchanan-street/5031205.article

TIF – Positive decision on Buchanan Quarter Tax Incremental Financing Application (2 April 2012)
http://www.scotland.gov.uk/News/Releases/2012/04/TIF-glasgow02042012

Glasgow ‘an ultimate sport city’ (5 April 2012)
http://www.bbc.co.uk/news/uk-scotland-glasgow-west-17629596

Glasgow airport passenger figures soar (11 April 2012)
http://www.theglaswegian.co.uk/glasgow-news/news/2012/04/11/glasgow-airport-passenger-figures-soar-thanks-to-international-traffic-boost-102692-23821494/

GCMB conference sales of £120m for 2011 financial year (17 April 2012)
http://digital-news-room.seeglasgow.com/Latest-News/Glasgow-City-Marketing-Bureau-reports-successful-year-end-with-120-million-conference-sales-boost-fa.aspx

HEROtsc brings 900 jobs to Glasgow (18 April 2012)
http://www.callcentrehelper.com/so-glad-to-belong-to-glasgow-28957.htm

Glasgow airport Scottish base for Dreamliner airplane (19 April 2012)
http://www.theglaswegian.co.uk/glasgow-news/news/2012/04/19/glasgow-airport-to-be-first-base-in-scotland-for-amazing-dreamliner-aeroplane-102692-23829955/

Glasgow best score yet for Keep Scotland Beautiful audit (25 April 2012)
http://www.eveningtimes.co.uk/news/glasgow-cleans-up-exclusive-city-sets-new-record-for-cleanliness-with-the-help-of-evening.17357566

EERR opens (27 April 2012)
http://www.glasgow.gov.uk/en/News/eastendregenerationroute.htm

New Park Inn Radisson coming to West George Street (30 April 2012)
http://www.incentivetravel.co.uk/extensions/7063-rezidor-announces-the-park-inn-by-radisson-glasgow-city-centre

Glasgow airport – Icelandair announces new route to Denver (11 May 2012)
http://www.glasgowairport.com/about-us/media-centre/press-releases/icelandair-announces-new-route--to-denver

Mailing List and Survey

To subscribe to Glasgow's Economic Health Check please send an email to citycentreissues@glasgow.gov.uk 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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