Item 1

19th November 2019

Glasgow City Council

Neighbourhoods, Housing and Public Realm City Policy Committee

Report by Executive Director of Regeneration and the Economy

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CITY CENTRE STRATEGY 2014-19: EVALUATION

Purpose of Report:

To update the Neighbourhoods, Housing and Public Realm City Policy Committee on the findings of the five-year evaluation of the City Centre Strategy 2014-19.

Recommendations:

It is recommended that Members:

(i) Consider the contents of this report;

(ii) Consider the progress made in Glasgow city centre over the 2014-2019 period;

(iii) Notes that the next phase of the City Centre Strategy is currently in development and will be progressed through the new governance structure to be established for the 2020-25 period.

Ward No(s): 10	Citywide: ✓
Local member(s) advised: Yes ☐ No ☐	consulted: Yes ☐ No ☐

1. INTRODUCTION

1.1 Members will recall that the City Centre Strategy (CCS) 2014-19 was approved by the Council's Executive Committee on 14 November 2013[1]. A commitment was made at that point to undertake an evaluation at the end of this five-year period in order to establish the overall impact of the Strategy. The process for the evaluation was approved by the CCS Board on 7 June 2018.

1.2 In parallel to the evaluation, work is underway on the development of the new City Centre Strategy 2020-25 (CCS 2020-25). The intention is to bring the new CCS 2020-25 to Neighbourhoods, Housing and Public Realm City Policy Committee in early 2020.

1.3 This purpose of this paper is to outline the emerging evaluation findings, focusing on the overarching deliverables, outputs and impact of the CCS 2014-19.

2. BACKGROUND AND CONTEXT

2.1 The context and background to the CCS 2014-19 is well known and will not be repeated at length here, but a short summary of the main contributory factors is provided below:

2.1.1 The 2008 economic crash, which disproportionately affected town and city centres, triggered a credit crunch which made borrowing significantly harder, and instituted a development freeze, numerous business insolvencies and job losses, the effects of which are still being felt 11 years later

2.1.2 The massive structural changes impacting on the retail and commercial office sectors, with rapidly changing investor requirements requiring smaller footprints and more flexible, quality space able to attract new industries

2.1.3 Retail and consumer trends - including the rise in online shopping, out of town competition, the convenience culture and the disproportionate increase in business rates vis-à-vis inflation - have demanded a wholescale rethink by policy makers on city centre strategy in all its forms. The growth of online retailing is shifting demand away from large floorplate retail in many high streets, but the importance of retail to Glasgow city centre should not be understated, and going forward there will be a continuing requirement to respond in strategic and policy terms to the major structural shifts in this sector

2.2 A series of objectives and themes were identified for the CCS 2014-19, generally focusing on measures that would increase investment, development, footflow and inclusive growth, and improve the day-to-day operations, management and promotion of the city centre. Around 50 projects were identified, ranging from large-scale sector strategies and frameworks that each

[1] https://www.glasgow.gov.uk/councillorsandcommittees/viewDoc.asp?c=P62AFQNTDX0GZL2U

comprised a number of sub-projects, plans and policies, to smaller-scale initiatives that targeted specific thematic issues such as city centre liveability or how to make productive use of lanes, social projects to promote autism awareness or family friendly areas, street art, wayfinding and advertising, BIDs, a biannual economic health check, lighting schemes, and more. Projects were grouped under one of four themes: Development, Management, Promotion and Enabling Infrastructure.

2.3 The "District Strategy" was the flagship proposal of the CCS 2014-19 and proposed:

(i) The creation of a District Regeneration Framework (DRF) for each of the nine city centre districts. DRFs are 10-year strategies with a mix of strategic and operational projects. The underlying objective of the DRF programme has been to develop and build on the unique identity, characteristics, opportunities and constraints of each of the districts

(ii) The Avenues programme of major investment in public realm. Delivery of this CCS aspiration was made possible through the allocation of £115m of City Deal funding

2.4 The focus of the first five-year phase of the CCS has been on developing the District Strategy and delivering the wider work programme. As this phase comes to an end, the intention is to shift focus to delivery of the District Strategy and a select number of current projects where there is clear justification for continuing current activity beyond 2019. There will be a limited number of new projects (there are expected to be some requirements such as the need to develop a new retail strategy and a street management policy).

2.5 Delivery of the CCS has been a real collaborative effort across a number of Council Services. External partner inputs of in-kind/financial contributions and participation in/leadership of various projects and activities have also been critical supports. Going forward, this partnership approach will be continued and built upon to achieve the widest possible benefits.

3. EVALUATION METHODOLOGY

3.1 The evaluation of the CCS 2014-19 included the following elements:

(i) **Project assessment**: the 50+ projects were assessed in terms of deliverables, strategic fit[2], outputs, outcomes and lessons learned

(ii) **User and stakeholder perceptions**: updated public perception surveys were commissioned; project public consultations were reviewed; business perceptions

(iii) **Performance analysis**: independent economic assessment; review of various development and performance indicators

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[2] CCS 2014-19 had six core objectives: **THE CENTRE TO…**

SHOP & PLAY	No 1 retail position outside London's West End; footflow, city centre experience, accessibility
VISIT & ENJOY	Leisure and business tourism; continual enhancement of visitor experience
WORK & CREATE	Job generation, support for SMEs and entrepreneurs, inward investment
LEARN & INNOVATE	Capitalise on FE/HE concentration, grow student numbers
STAY & LIVE	Residential growth, supporting infrastructure, building conversion opps, public realm
INVEST & BUILD	Investment location, establishment and promotion of city centre districts

3.2 This report will provide the headline outcomes of the evaluation elements in the following sections.

4. PROJECT ASSESSMENT: WHAT WE'VE DELIVERED

4.1 Development

4.1.1 City Centre Avenues

(i) Funding allocations by City Deal and most recently, Sustrans and Scottish Natural Heritage, are making the **Avenues programme** a reality. A total of 21 "avenues" will be developed in the coming years; this new approach to public realm design directly responding to the national placemaking agenda with its focus on pedestrian priority, active travel, improvements in bus/public transport facilities, reductions in private vehicle space, and green/SMART infrastructure.

(ii) **Sauchiehall Avenue phase 1** was officially launched on 18 September 2019 – the first demonstrator of the Avenues programme. The section of the street between Charing Cross and Rose Street has been transformed, with wider pavements, a segregated cycle lane, an avenue of trees, more street furniture, and "intelligent" lighting.

(iii) Design work is well underway on the Block A and Block B groups of the **wider Avenues programme,** and planning is ongoing to understand the requirements of COP26 in November 2020, which is likely to have a major impact on the construction programme. Design work will commence with the Block C group of avenues in 2020.

(iv) The **High Street Station redevelopment** plan is underway, and will provide modern station facilities, DDA access, and a new plaza in front of the station building. Funds are in place to deliver **public realm improvements on High Street**, and this will be progressed once the position of High Street in the forthcoming city centre Low Emission Zone is known. This project is being developed in alignment with parallel area projects such as the High Street Area Strategy and the Avenues programme.

4.1.2 District Regeneration Frameworks

(i) The **Sauchiehall & Garnethill District Regeneration Framework (SGDRF)** was approved in 2016 and work is well underway on five of the eight key projects, including Sauchiehall Precinct Avenue, the Underline, and the proposed garden cap at the M8 (which will report back to committee in mid-2020 as part of the Charing Cross Projects Feasibility Study). Improvement works have been delivered in **Garnethill Park** with the support of the local community. A wider SGDRF **community project programme** is in development, along with the key project proposals for Cowcaddens Road and surrounds.

(ii) The **Broomielaw DRF** was approved in 2018 and work is underway on its delivery plan, with design work well underway on Argyle Street Avenue, and feasibility work is in progress on the River Park. **St Enoch DRF** has just completed public consultation and will be prepared for final approval in late 2019, and **Central and Blythswood DRFs** will both go through public consultation and committee over the remainder of 2019/20. Work on the **final four DRFs** will progress in 2020.

4.1.3 **Sector and Area strategies**

(i) The **Strategic Development Frameworks** (SDFs) for the River and the City Centre are in the final stages of development, expected to be approved early 2020.

(ii) The **High Street Area Strategy** was launched in early 2019 with a strong emphasis on partnership working in order to deal with some of the long-term property and regeneration issues in the High Street and Saltmarket areas. A five-year action plan will support the vibrant local community with a visitor offer focused on the area's unique heritage assets and independent businesses within the historic corridor, with funds in place for shopfront improvements, meanwhile uses, and various other projects.

(iii) A **Conversation with George Square** was launched in October 2019, with the results informing the subsequent design strategy for this civic space to be progressed over the 2020-25 period.

(iv) Various **community placemaking projects** have been delivered, including stalled space projects at Gordon Street, Central Station, and Townhead Village Hall, and new street furniture in Buchanan Street and Argyle Street;. Improvement works have been delivered in Garnethill Park in collaboration with Glasgow School of Art students and the local community. Greyfriars Garden at George Street is currently being redesigned by students from the University of Strathclyde's Department of Architecture.

(v) The **City Centre Lane Strategy** has enabled various community and cultural events to be delivered in lanes through the Lane Activation Fund, enabling greater footflow and dwell-time. The Lane Improvement Initiative is now progressing public realm improvements on the six priority lanes identified in the Strategy.

(vi) The **City Centre Living Strategy** will go through public consultation in late 2019. Its ambition is to double the city centre population by 2035 and to provide the policy, strategy and physical framework to achieve that strategic objective.

(vii) An interim **Retail and Night-Time Economy Action Plan** was produced in 2015, followed by the launch of the Glasgow Night-Time Economy Commission in 2018. The Commission will publish its recommendations later this year. The new CCS 2020-25 is likely to have a requirement to consider city centre retail in the context of future strategy.

4.1.4 **Operational/Enhancement projects**

(i) The **Commercial Waste project** was a response to the number of commercial bins occupying almost every city centre street. With the invaluable support of the business community and trade waste contractors, this project removed over 2000 bins which had been permanently sited on city centre streets. It has now been rolled out city-wide.

(ii) Eight new **canopies of light** have been installed at locations throughout the city centre, and a new **festive lighting scheme** was introduced in George Square.

(iii) In terms of **inward investment**, the success of the previous Glasgow Investment Strategy was acknowledged in the 2016 FDI Awards; Glasgow was one of the European Cities of the Future, and it gained a runner up spot for its FDI strategy as well as top 10 place finishes for *Business Friendliness* and *Economic Potential*. Investment results confirmed that Glasgow was the most successful city in Scotland at attracting FDI. To maintain this level of success the strategy was refreshed for 2016-23. The primary focus moved to supporting the creation of an additional 15,000 jobs across all employment sectors. It will continue to seek investment for inward development opportunities, including for Retail, Hotel and Tourism sectors. In 2019 this consistently high level of performance was recognised as Glasgow was ranked the 6th Most Successful UK City for attracting inward investment.

(iv) A street food project, **Good Food Glasgow**, was piloted at the Broomielaw and in the Merchant City in 2016 to test the concept of a quality street food market in the city centre (noting the ban on street trading in the city centre). This proved a huge success, particularly at Broomielaw, and demonstrated the potential of street food in driving footflow and dwell-time. A contract was developed for a multi-year street food market and this will be awarded in 2019, with Good Food Glasgow going live in Spring 2020 at the Broomielaw and St Enoch Square. This will deliver regular street food events at these locations.

4.2 Management

(i) A dedicated **City Centre Manager** role was established in 2018 and has been widely welcomed across the city centre. This has delivered the desired single point of contact for all city centre operational issues, and improved coordination of operational services.

(ii) Prior to that role, a **City Centre Resource Team** had been established to operate in an ambassadorial role on the Style Mile, providing a visible point of contact to the public, and to lead on day-to-day business engagement. The team is supported by mobile CCTV vehicles, public space CCTV, and access to the **Digital Radio Network** – another CCS project that connects the business community and helps with safety matters and general communications.

(iii) Several **Operational Action Plans** have been delivered since 2014. These are short term, targeted plans dealing with immediate issues impacting on the local community, in small areas such as Union Street, Royal Exchange Square, St Vincent Place, and St Enoch Square.

(iv) A **City Centre Mural Trail** was developed to support the evolving city centre mural project. This has become a major success story for the city, with international acclaim for the quality and range of unique street art. The mural trail is the top 3 most visited page on the People Make Glasgow website, behind the *Home* and *What's On* pages. Average dwell-time on the mural trail page is 5 mins 50 sec which is 184% above the site average. At the time of writing, Trip Advisor scores the mural trail 5/5, with a Certificate of Excellence, and places it number 11 of 310 things to do in Glasgow. A **Mural Fund** provides up to 100% of project costs. Many other organisations have been inspired by the mural project: the BBC's Billy Connolly murals and the Radisson Red's gift to the city of a Mackintosh mural, are just two examples.

(v) Building on that success, a **Contemporary Art Trail** is now in development, and will be launched in 2020.

(vi) In 2016, an **Autism Aware City Centre** project was launched to train city centre businesses and other organisations on measures to assist people with autism. This involved training courses which have resulted in over 200 trained staff in the city centre, 24 project partner organisations, two city centre Quiet Rooms, countless quiet hours and spaces, and also various sensory bags at venues across the city, allowing autistic families and visitors that normally wouldn't visit the city centre to access services in a safe and comfortable environment. This project is now being rolled out city-wide.

(vii) A **City Centre Child Safe** project was launched in 2016, aiming to support families with children who wish to enjoy the city centre. Wristbands and guidance are available at a range of city centre businesses, travel hubs and other organisations. This provides a valuable support for any lost child incident.

(viii) The **Nite Zone** programme has been expanded through the CCS with an additional site being funded at West George Street. The Nite Zones collectively have assisted more than 2 million people through safe marshalling while queuing for late night transport.

(ix) A **Business Improvement District (BID)** was established at Sauchiehall Street in 2013 but it did not renew its tenure after the initial five-year term. This was predominantly down to the disruption faced by member businesses over the BID duration, stemming from the two major fires at Glasgow School of Art, the Sauchiehall Avenue project, and the corresponding impact on business operations. However BIDs have become proven methods of city centre regeneration across Scotland and the UK, and going forward this is an initiative that the CCS 2020-2025 will be keen to revisit.

(x) A **Begging Strategy** is currently in development. It recognises the complex issues of begging and involves a multi-disciplinary group of statutory and third sector agencies. Various workstreams are now underway to develop the evidence base required for a longer-term strategy. To date, the strategy has funded a Digital Inclusion officer who engages directly with individuals and ensures they are accessing all available services. More recently, an Alternative Giving scheme[3] has been developed. This offers people who wish to support beggars an alternative to giving cash directly to vulnerable individuals. Alternative Giving involves businesses and other orgnaisations providing the facilities for electronic donations that can be made direct to Third Sector homelessness support services, for more strategic impact.

4.3 Promotion

(i) Several different **multi-channel marketing campaigns** have been delivered, promoting Glasgow city centre as a destination to shop, play, visit and enjoy. This included day into night-time economy activity and marketing late-night trading. Partnerships were developed with transport providers to link ticket offers to the retail proposition in the city centre.

(ii) The **Glasgow Loves Christmas** campaign has also been delivered annually as a six-week fully integrated marketing and PR campaign. There are over 86,000 Facebook followers and over 4,800 Twitter followers.

(iii) The annual **Style Mile Christmas Carnival** has become a cornerstone of the city centre festive programme, alongside other successful events such as the George Square Christmas Markets, Santa Dash, and Christmas Lights Switch On. The Carnival has averaged 500 participants annually in the themed parade, which is accompanied by street entertainment, live music, and family-focused activity. To date the carnival has brought in an additional 20,000 visitors to the city centre each year – in excess of 100,000 over the CCS 2014-19 period.

4.4 Enabling Infrastructure

(i) The **City Centre Traffic and Transport Strategy** was developed in 2014 and is currently under review to maximise the benefits and opportunities presented through the Connectivity Commission, Avenues Programme and introduction of key strategic priorities like Low Emission Zone. An updated strategy is being prepared for late 2020;

(ii) The **NextBike cycle hire** scheme was introduced in 2014 to promote active travel, and following the launch has seen continuous growth in terms of user numbers and geographical scope. There are currently 700 bikes and 70 hire stations across the city, and over 760,000 rentals since 2014.

(iii) A **Changing Places** provision has been established at the St Enoch Centre, along with online mapping of facilities to support user needs.

[3] *Alternative Giving* is an initiative that has worked well in some other local authority areas. It seeks to persuade people wishing to give money to beggars to do so through alternative measures, namely through direct support to homelessness charities and other support services

(iv) Various measures have been introduced to improve **street cleansing**. The city centre has seen the introduction of larger bins, large recycling bins, a trial of solar powered bins, new plant and equipment, and smart bins.

(v) An **Event and Marketing Protocol & Toolkit** was launched in 2017 to give guidance to stakeholders and event organisers on the protocol of hiring public space in the city centre, including event delivery guidance.

5. USER AND STAKEHOLDER PERCEPTIONS

5.1 Consumer Research

5.1.1 It has been a priority of the CCS 2014-19 to underpin the strategy activity with a strong base of evidence that is thoroughly and regularly tested with local stakeholders. Expansive consumer research was undertaken on the city centre retail and night-time offer in 2013 (retail only), 2015 and 2018, to baseline and benchmark consumer perceptions. The following section outlines some key activities and findings in these areas from the 2018 surveys.

5.1.2 ***Retail***:

(i) The key benefits of Glasgow city centre were identified as the range and quality of shops, the atmosphere, and the food and drink options available

(ii) There have been increases in the proportions identifying the atmosphere and the food and drink options as positives in the city centre; however, those identifying the quality and range of shops has decreased (although it remains the top answer). Competition from expanding out-of-town shopping centres may be eroding the uniqueness of the city centre offering in terms of the shops available, although the city centre still outperforms in terms of food and drink and atmosphere

(iii) The key negative of the city centre identified by visitors was the number of beggars (mentioned by 26% of respondents). Some non-visitors also mentioned beggars (22%) but the main concern for this group was the crowds (33%). The cost and availability of parking was also seen as a barrier to city centre shopping for both visitors and non-visitors

(iv) Cheaper parking was also the top answer for both visitors and non-visitors when asked what would encourage them to shop in the city centre more often. The main methods of transport for visitors were train (31%) and bus (29%). Approximately one in five visitors travelled by car, as opposed to almost half of non-visitors

(v) In terms of rating Glasgow city centre, both visitors and non-visitors provided high ratings of the overall experience of shopping in Glasgow city centre – on average both scored approximately 8.0/10 in terms of satisfaction. The highest rated elements were food and drink, the range of shops, attractions/leisure, and atmosphere/ambience

5.1.3 ***Night Time Economy***

(i) The city centre has an overall satisfaction rating of 8.9/10. Over 90% of respondents agreed that the city centre is a fun and exciting place to visit. However this is offset by the fact that the research shows that there has been a decline in the frequency of visits since 2015. In addition, 100% of respondents thought Glasgow was one of the best cities for NTE in Britain in 2015. In 2018 this had fallen to 78%

(ii) The biggest issues mentioned by respondents were the number of beggars, too many people under the influence, expensive generally, and expensive to get home. Yet there is a marked decline in the number of people who feel that public transport, policing or safety needs to be improved

(iii) Visitors are more likely to drink alcohol at home before going out, and a higher proportion reported using discount vouchers, offers and social media where planning where to go. Value is increasingly an issue

5.1.2 The overall message from this research is that the competition, consumer expectations and requirements are constantly evolving. Continually improving the experience and atmosphere is essential if Glasgow city centre is to sustain and grow its competitive advantage as the place to shop and play. The overall shopping experience scored 8.0/10 in 2018 in terms of satisfaction, giving a sound base on which to build. However it is noted that this is down from an average of 8.8 in 2008.

5.2 Public consultations – DRFs and other projects

5.2.1 In addition to the public and stakeholder engagement embedded into the CCS project development process, all significant projects go out to public consultation. For the DRF consultations conducted to date (including Sauchiehall, Broomielaw and St Enoch DRFs, around 800 responses were generated in total, with overwhelmingly supportive outcomes. The Good Food Glasgow pilot generated over 2,000 consultee responses also receiving huge public support, and the High Street Area Strategy consultation received 300 responses, again very positive.

5.2.2 This level of support is in line with all CCS consultations initiated to date. Given the consistency of the findings and levels of support, it appears evident that the approach taken to underpin all activity with a robust evidence base that is soundly and regularly tested on stakeholders, is a reasonable approach.

5.2.3 Illustrating the collaborative approach taken to the DRFs, over 5,000 people have directly participated in the public engagement process to date.

5.3 Business engagement

5.3.1 An outline assessment undertaken through the Glasgow Chamber of Commerce in mid-2018 established some interim findings in relation to the CCS 2014-19. In respect of what is felt to have worked to date, the following points were made:

(i) CCS Board a welcome opportunity to engage
(ii) City Centre Regeneration team welcomed as a core point of contact
(iii) Strategies have been developed that now allow the next five years to be a period of delivery (Living Strategy, Connectivity Commission, Avenues Programme, DRFs)
(iv) City Centre Avenues programme, other public realm improvements, and policies and strategies that are being developed to better utilise space (lanes, outdoor cafes)
(v) DRFs delivering both operational improvements and aspirational infrastructure projects
(vi) Recent City Centre Manager appointment, with focus on tackling related issues that impact on the city centre experience (anti-social behaviour, commercial waste, cleansing)

5.3.2 A range of ongoing issues have also been cited:
(i) Homelessness/begging is increasing and very visible. Latest consumer research highlights this as the key city centre issue
(ii) Footflow decline, especially at weekends
(iii) Impact of tax/levy proposals (tourist bed tax, outdoor music, workplace parking)
(iv) Rent and rates based on historical levels
(v) Regulatory pressures
(vi) Less visible city centre marketing

5.3.3 Detailed business engagement is being undertaken through the Glasgow Chamber of Commerce as part of the CCS 2020-25 development, and the role of the business community in the new strategy going forward will continue to be central to its success.

6. PERFORMANCE ANALYSIS

6.1 **Economic Impact[4]:** An economic analysis was commissioned to support the evaluation process. This looked at the rate of movement in a range of indicators, over the strategy period. Dates provided relate to the most recently available data. The key findings are summarised in this section.

6.1.1 ***Population***
- 2014-2017: increased by 11% (Local Authority 4%; Scotland 1%)

1. This was driven by growth in the working-age population, particularly younger working age population, in turn facilitated by the increasing supply of large private build-to-rent student accommodation

6.1.2 ***Employment***
- 2014-2017: increased by 7% (Local Authority 4%; Scotland 2%)

2. This equates to an increase of 9,000 and accounts for 53% of the increase throughout the local authority

[4] Sources: NRS, Scottish Government, UK Business Count, Scottish Annual Business Statistics, BRES, APS

3. The number of new employees (excl. self-employed) has increased, with two-thirds of new jobs in the city centre being full-time, compared to 41% at local authority level
4. Sectors with the largest increases in employment were professional, scientific and technical services (+23%), and business administration and support services (+16%)
5. Retail employment decreased by 1,500 (-12%) against a larger decline of 4,000 at local authority level. However there are still 11,000 retail jobs comprising 8% of all city centre employment
6. The city centre accounts for 16% of all jobs across the city region, including two-thirds of all finance and insurance employment

6.1.3 ***Enterprise***

- 2014-2018: increase of 19% (640 enterprises) registered in the city centre (Local Authority 20%)

7. The largest growth in local units used for business administration and support services (36%) and professional, scientific and technical services (18%)
8. There are 30 fewer retail enterprises and 75 fewer local units used for retail

6.1.4 ***Housing***

- The growing supply of large private build-to-rent student accommodation within the city centre was reflected in the rise of housing units with only one habitable room (+1699 – 2014-2017)
- Average house prices retain higher than at local authority level however the gap is narrowing, possibly due to the growth in private student accommodation within the city centre, and suburban housing developments

6.1.5 ***Commercial rents***

- Prime office rents have increased by 30% to £350 per sq.m and zone A retail rents have increased by 15%
- Glasgow city centre has had an undersupply of Grade A office space. However this is the focus of new development activity and by end 2019 there will be an additional 196,000 sq.ft of Grade A refurbished space ready for occupancy. With an increase in supply, prime headline office rents are likely to increase further

6.1.6 ***Tourism***

- The tourism sector is performing strongly at both regional and city level with an increase of 30% (c210,000 additional visitors) over 2014-2018
- Total visitor expenditure is up 36%, and the average number of total nights spent is up by almost 30%

6.2 **Other performance indicators:** in addition to the economic analysis, a wider assessment was made of other performance measures pertinent to the CCS 2014-19.

6.2.1 ***Footflow***

- Footflow is measured across six counters in Glasgow city centre, four of which were in place for the start of the 2014-2019 strategy period. Footflow has fallen by a total of 9.2% across the four initial counters over that time
- Footflow across the UK and Scotland has also declined over the same period – with UK footflow falling on average 1.3% and Scottish footflow declining by 5.3% on average
- It should be noted however that there were several major events taking place in Glasgow during 2014 that had a positive impact on footflow – these include 2014 Commonwealth Games, Radio 1's Big Weekend and the MTV EMAs
- In comparison, in 2018, several events should be taken into consideration that resulted in a negative impact of footflow – these include two major city centre fires, red weather warnings for snow and ice in Feb/March, and major construction works such as the Sauchiehall Street Avenues project. However, footflow in 2019 remains positive and shows a steady incline in comparison to UK and Scotland figures

6.2.2 ***Conference activity***

- Glasgow is the conference capital of Scotland and is ranked 28th out of 400 conference cities globally by the International Conference and Congress Association. No other UK cities are in the top 30 apart from London. Although the Scottish Events Campus (SEC) is on the edge of the city centre boundary, its impact and the interdependencies are significant. In 2019 it won the Best UK Conference Centre[5] beating off competition from London, Birmingham and Liverpool, and generating £457m for the Glasgow economy.

6.2.3 ***Innovation Quarter***

- The Glasgow City Innovation District (GCID) was launched in February 2019 as a partnership between the University of Strathclyde, Glasgow City Council (GCC) and Scottish Enterprise. This utilises existing world-class facilities at the Technology Innovation Centre (TIC), Innovo, and GCC's Tontine Business Incubator

- Delivery of TIC2 and Innovo2 will be progressed with the support of Growth Accelerator Model funding. This will further drive the scale and scope of potential economic growth through innovation. The location in the Merchant City is bringing various benefits and cross-fertilisation opportunities with the many creative facilities in the area

6.2.4 ***Planning and Building Warrants***

- Since 2014 development across Ward 10 (Anderston/City/Yorkhill) has continued to grow at a steady rate and this shows no sign of slowing down with several new hotels and mixed-use developments currently on site and in the pipeline. Major planning applications across the wider city have also seen a steady growth over the 2014-19 period:

[5] Meetings and Incentive Travel Awards 2019

- Planning applications received Increased 31.4%
- Major planning applications across the city Increased 20%
- Building Warrants received Increased 19%

- Some of the significant city centre developments delivered over the same period include:
    - St Vincent Plaza
    - Scottish Power HQ
    - City of Glasgow College Riverside Campus
    - City of Glasgow College Cathedral Street Campus
    - 110 Queen Street
    - Douglas House, Waterloo Street

9. New developments either in development or currently on site:
    - SEC expansion (pending relevant permissions)
    - Tradeston development (on site)
    - St Enoch Centre expansion (on site)
    - Custom House, Clyde Street (on site)
    - 177 Bothwell Street (on site)
    - Love Loan Development, George Street (on site)

10. In relation to hotels, since hosting the Commonwealth Games in 2014 this sector in Glasgow has seen the fastest growth compared to any other UK city, increasing eight times faster than the UK average. Openings within or close to Glasgow city centre over the 2014-2019 period include the Radisson Red, Motel One, Ibis Style, and Marriot's Moxy Hotel at High Street, and new brands continue to show strong interest.

6.3 Glasgow's competitive position

6.3.1 The city has continued to perform well against its UK competitors over the 2014-19 period. As well as being the fourth-placed *Best City to Visit in the UK*[6], Glasgow was ranked the UK's fifth-placed *Most Visited City in 2015* by international visitors[7].

6.3.2 As the fourth-best city to visit in the UK beating Birmingham and Manchester, and also the *Friendliest City in the UK*, it is no surprise that Glasgow's museums have seen a steady increase year-on-year since 2014. The growth in tourists visiting Glasgow outperformed the Scottish average over the 2014-18 period[8].

6.3.3 Over the 2014-19 period Glasgow has retained its 2nd place UK retail position outwith London's West End, as ranked by Experian (comparison spend) and Harper Dennis Hobbs (retail spend potential), and 3rd place as ranked by Javellin (venue score). As the evaluation highlights, pressures on the global

[6] TripAdvisor
[7] Invest Glasgow
[8] Visit Scotland

retail sector continue to impact on high streets and city centres over ten years after the economic crash, and Glasgow is no exception.

6.3.4 A number of CCS 2014-19 projects have been nominated for awards, and successes include:

(i) **Broomielaw District Regeneration Framework**
- Winner: Masterplanning Award (Scottish Design Awards 2019)

(ii) **City Centre Mural Fund**
- Winner: Enterprise Award (Arts and Business Scotland 2017)
- Highly Commended: (Idox Innovation Awards 2015)
- Shortlisted: (UK Planning Awards 2017)

(iii) **Autism Aware Glasgow**
- Winner: Best Social and Community Contribution (ATCM 2018)

(iv) Avenues
- *Tba*: Sauchiehall Street Avenue (British Association of Landscape Industries)
- Highly Commended: Sauchiehall Street Avenue (Healthy Streets 2019)
- Winner: Best Photograph (auchiehall Street Avenue (Healthy Streets 2019)

7. CONCLUSIONS

7.1 It should be evident from this report that the CCS 2014-19 has performed strongly in terms of project deliverables, and the economic and performance indicators would suggest that the strategy is contributing to the city's macro position in both quantitative and qualitative terms.

7.2 The retail sector is one area where performance is not so positive. New technology is driving change and reinforcing shifts in consumer behaviour as the internet provides more options than ever for shoppers. This is a global problem and in comparative terms Glasgow city centre has performed reasonably well. Glasgow's 8% fall in the number of retail businesses is on a par with Birmingham (-6%) and Manchester (-7%) and ahead of Edinburgh (-13%). Glasgow is also ahead of the trend in terms of the performance of retail local units (-3% 2016-18)[9]. Nonetheless, in order to protect the city centre retail offer it will be essential for the CCS 2020-25 to continue its focus on placemaking, and on creating the city centre destination environment and experience that will attract new development and sustain existing investment.

7.3 There are many opportunities for the 2020-25 period and there is optimism about the direction of the CCS. While the development of the new CCS 2020-25 is still in progress, there appears to be consensus and support for continuing the approach taken to date: an aspirational strategy with a heavy focus on delivery, developed on a strong and varied evidence base, and tested regularly

[9] BRES, UK Business Count

with stakeholders and project beneficiaries. Understanding city centre resident, business and visitor priorities have helped direct operational resources at specific initiatives that achieve the widest benefits. Responding to a wide range of local and national strategic objectives has invited external funding and collaboration opportunities with various organisations across Scotland.

7.4 There is also broad support for consolidating activity under the DRFs and Avenues, and limiting new activity to essential interventions only. This will allow resources to be most effectively targeted. Continuation of the partnership approach, both within and outwith GCC, will be essential to maximise additionality and deliver value for money.

7.5 The delivery of these plans is transforming the physical environment, while other projects and policies are focusing on more immediate issues that will increase footflow, dwell-time, visitor activity, and investment. This activity is adding to the sense of possibility and optimism, evidenced somewhat by the number of cranes in operation across the city centre.

7.6 The new CCS 2020-25 is therefore likely to continue the approach of promoting sustainability and resilience alongside inclusive economic growth. The strategy to increase the residential population, the catalytic role of the innovation districts, the Avenues programme, the DRF community programmes, and the broad role of the business community in the CCS all point to a broad approach that supports all sectors and has already delivered an employment recovery which is ahead of forecasts, and a strong development pipeline.

8. POLICY AND RESOURCE IMPLICATIONS

Resource Implications:

Financial:	All the existing financial requirements to support the CCS will be met from existing capital and revenue budgets.
Legal:	There are no immediate legal issues however these will be assessed and addressed as individual projects are developed.
Personnel:	There are no direct personnel issues.
Procurement:	Procurement resources will be required to progress individual contracts and related project activity.

Council Strategic Plan: Specify which theme(s) and outcome(s) the proposal supports

The CCS supports the following themes:

- A Thriving Economy, with specific outcomes:
  - A Resilient, growing and diverse city economy where businesses thrive;
  - Glasgow is rated highly for its business innovation and digital skills.

Priorities: 2, 5, 6, 8, 11

- A Vibrant City with specific outcomes:
  - Glasgow is a world class destination for tourism, culture, sport, events and heritage.

Priorities: 13, 17, 21

- A Sustainable and Low Carbon City with specific outcomes:
  - The city is clean and public spaces are well maintained;
  - We have more sustainable, integrated transport networks across the city, and less congestion;
  - Citizens use active travel, including walking and cycling.

Priorities: 54, 60, 64, 65, 66

- Resilient and Empowered Neighbourhoods with specific outcomes:
  - Citizens and neighbourhoods can influence how services are developed and budgets spent.

Priorities: 75, 76, 78, 83, 87, 88, 89

- A Well Governed City that Listens and Responds with specific outcomes:
  - Citizens are more involved in local and citywide decision making.

Priorities: 94, 95

Equality and Socio-Economic Impacts: *Does the proposal support the Council's Equality Outcomes 2017-22*	• The project will help deliver Outcome 9 by improving opportunities for physical activity through the increase in active travel opportunities. • The project will help deliver Outcome 10 through the direct engagement with vulnerable user groups during public realm design processes.

What are the potential equality impacts as a result of this report?	Positive impact: the project will improve accessibility through improved connectivity through the city centre.
Please highlight if the policy/proposal will help address socio economic disadvantage	Yes through the provision of projects that promote environmental and regeneration enhancements with inclusive growth at their heart. The CCS will promote accessibility, inclusivity and connectivity, providing positive benefits for all socio-economic groups. Specific projects in the action plan will be EQIA-assessed as required. We will be taken relevant measures to ensure that those consulted reflect the profiles of existing communities.

Sustainability Impacts:

Environmental:	The CCS will support the following themes: A Sustainable and Low Carbon Economy, specifically the following outcomes: • *The city is clean and public spaces are well maintained;* • *We have more sustainable, integrated transport networks across the city, and less congestion;* • *Citizens use active travel, including walking and cycling*. This includes direct intervention in the following priorities: • *54: Invest in roads and pavement maintenance, improving conditions, resident's satisfaction and contributing to active travel networks;* • *64: Improve the city's cleanliness and recycling rates and residents' satisfaction with these issues;* • *65: Build high quality, inclusive active travel infrastructure to make Glasgow an excellent cycling and walking city;* • *66: Improve the efficiency of our services through the development of smart technology including street lighting.*
Social, including opportunities under Article 20	• Various actions within the CCS will benefit local residents • The focus on supporting local SMEs will encourage footflow which in turn will impact on job creation and skills development.

of the European Public Procurement Directive*:*	• The local communities throughout the nine city centre districts and the wider city will benefit from the improvements to be delivered through the CCS. • Contracts able to provide supported employment opportunities under Article 19 will be explored as part of the individual projects' development processes.
Economic:	• Various actions within the CCS will benefit local businesses and other organisations. • This will in turn support the local economy.
Privacy and Data Protection impacts:	A DPIA is required by law where the processing of personal data is likely to result in a high risk to the rights and freedoms of individuals. The project will not collect personal data except through the provision of contact details for the purposes of community engagement. Permission for any other use, or any ongoing use, will be sought at the point contact details are given.

9. RECOMMENDATIONS:

9.1 It is recommended that Members:

(i) Consider the contents of this report;

(ii) Consider the progress made in Glasgow city centre over the 2014-2019 period;

(iii) Notes that the next phase of the City Centre Strategy is currently in development and will be progressed through the new governance structure to be established for the 2020-25 period.