Byres Road Vitality and Viability Report

Report for Byres Road Traders Association and Glasgow City Council

December 2014

EKOS Limited, St. George's Studios, 93-97 St. George's Road, Glasgow, G3 6JA
Reg 145099

Telephone: 0141 353 1994
Web: www.ekos-consultants.co.uk

Direct enquiries regarding this report should be submitted to:

Mhairi Donaghy, Associate Director, EKOS

Email: mhairi.donaghy@ekos.co.uk

Tel: 0141 353 8309

As part of our green office policy all EKOS reports are printed double sided on 100% sustainable paper

Contents

1. Introduction

EKOS Economic and Social Development was commissioned by the Byres Road Traders Association (BRTA) to undertake 'Vitality and Viability' research, focusing on economic issues. The output from the research enhances the evidence base to establish a Business Improvement District (BID) for Byres Road, but also informs a Strategy and Action Plan being prepared by Glasgow City Council for the future development of Byres Road.

BRTA has been awarded seedcorn grant funding by the Scottish Government to develop a proposal to establish a BID for Byres Road.

A BID is a precisely defined geographic area where the businesses have come together to invest collectively in local improvements. It is not a substitute for central or local government investment, but an additional investment that will strengthen the local economy and give local businesses a unified voice. It helps to create an arena for businesses and local authorities to increase their understanding of each other's priorities.

1.1 Byres Road – Area Context

Byres Road is the main high street of the West End of Glasgow and the most important retail street outside the city centre. The wider Partick/Byres Road area is identified as a Strategic Centre in the Structure Plan [1] and a Tier 2 Centre in City Plan 2[2].

From the Botanic Gardens in the north to Partick Cross in the south, it is a busy commercial street that, along with its network of back lanes, attracts a large day and night time visitor population that uses the convenience and specialist shops, bars, restaurants and cinema. This diversity has a significant impact on the character and feel of the area, as well as on the local economy.

Byres Road is not just a retail destination, but also provides an important social and leisure function with a wide range of functions and facilities for local residents and attractions for visitors and, as such, plays the dual roles of serving the highly dense

1 Glasgow and the Clyde Valley Strategic Development Plan
2 Glasgow City Council City Plan 2, December 2009

locality as well as contributing to the city's tourism economy. The catchment population for the wider Partick/Byres Road area is around 45,000 local residents, but there are major issues with retail expenditure leakage – primarily to the City Centre but also large volumes to Braehead Shopping Centre[3].

Visitors are attracted from the wider city region for the area's different shopping offer (specialist independent shops), range of cafés and the setting within the wider 'charming' west end. The street is also close to an impressive range of visitor attractions, including the Botanic Gardens, Kelvingrove Art Gallery and Museum, the Hunterian Museum and the Riverside Museum – all of which are recognised as international visitor attractions.

Glasgow University's main campus adjoins Byres Road and a large number of students and staff live in the local area, which has contributed to a slightly bohemian character over many years. Glasgow University is currently preparing a Campus Development Framework to guide the future development and expansion of its campus, which will include the recently acquired site of the former Western Infirmary that adjoins Byres Road to the south.

Byres Road has a vibrant buzz and feel of a traditional high street, although its character is different from top to bottom. The part of the street north of University Avenue is a Conservation Area. It contains larger retail floor plates and is designated as the 'Principal Retail Area' in Glasgow's City Plan 2 (and emerging City Plan 3), with a limit of no more than 20% ground floor non-Class 1 retail uses.

The area south of University Avenue contains no such designations and is characterised by smaller floor plates, fewer bars/cafés, more estate agents and small local shops and services (e.g. hairdressers and beauty salons). Consequently, visitors tend to focus on the upper half of Byres Road and the lower half is quieter both in terms of traffic and pedestrians. The southern end of Byres Road gives the appearance of poorer quality, partly influenced by the derelict site of the former swimming baths and the blank wall of the Western Infirmary.

Byres Road is very well served by public transport – there are a range of bus services, two underground stations and a train station at Partick (c. ten minute walk from the southern end of Byres Road). This good connectivity with the city centre

3 Partick/Byres Road Town Centre Profile, Glasgow City Counil

and the rest of Glasgow means that many visitors use the area as a cultural attraction and day/evening destination.

1.2 Byres Road – Issues

Byres Road has retained a good mix of local traders and multi-national retailers. However, like many areas the impact of the recession has led to an increase in vacant retail units and greater uptake by charity shops. While it is important that the area retains its key retailing function, it is important to take account of changes in shopper needs and behaviour (creating less demand for traditional retail floorspace) and identify alternative uses for property that add to the mix of uses and create footfall (increased demand for food and drink outlets).

Local traders have expressed concern regarding high rent and rates, which they believe is displacing activity from Byres Road into surrounding areas that are deemed more affordable e.g. Kelvinbridge, Queen Margaret Drive, Hyndland and Finnieston. Increasingly difficult trading conditions for retail businesses has led to a decline in the number of independent retailers operating on Byres Road – this has affected the character and USP of the street i.e. the reason that people visit. Concerns have also been voiced about the higher proportion of multi-national chains as well as an increasing proportion of cafés, bars and restaurants in comparison to retail outlets.

The street has also been affected by infrastructure and public service changes, such as the withdrawal of the BBC from Queen Margaret Drive and the ongoing gradual withdrawal of the Western Infirmary, its staff and patients, from the bottom of the street. These are having, and will continue to have, an impact on footfall and revenue generation.

The street current suffers from poor 'place quality' – traffic dominance, narrow pavements, street clutter (poles, signs, etc) and poor/cracked/deteriorating paving make for a poor pedestrian experience and detracts from the attractiveness of the area as a destination for shoppers and visitors.

1.3 Byres Road BID and Place-Making Enhancements

In response to the issues outlined above, and concerns expressed by local traders and the wider community, two main strands of work have commenced – development of a BID and preparation of a Place-Making Strategy and Action Plan.

These two projects reflect a renewed vigour in the area and a desire by stakeholders to prevent further decline of Byres Road and ensure that it thrives in the future.

Byres Road BID

Local traders have formed the BRTA and initiated a BID, which is now in development. A BID Project Manager has been appointed to work with local businesses to identify the issues/opportunities, and to develop a Business Plan that will form the basis of BID investment.

The Byres Road and Lanes Business Improvement District is now formally working toward a ballot in 2015. The BID area covers Byres Road and the lanes extending from Great Western Road to Chancellor Street.

Over the recent months the BID Steering Group and Project Manager have finalised the formal proposal, outlined in the Business Plan, which forms the basis of a ballot amongst local businesses. The ballot date is provisionally set for 26th February 2015. In total there are 204 properties included in the BID area, of which 7 are identified as empty, a vacancy rate of 3.4%[4].

Byres Road Place-Making Strategy and Action Plan

Glasgow City Council (GCC) is currently preparing a Strategy and Action Plan to improve Byres Road and guide its future development. This work has been informed by, and responds to the issues raised at, community place-making workshops. The strategy will recommend intervention for the public realm (to reduce traffic dominance, widen pavements, create civic spaces for people to sit and linger), and will advise on addressing shop vacancies and a future sustainable range of uses.

Allied to the strategy, GCC is keen to progress activity in the area and improvement works are currently underway on the lanes adjacent to Byres Road. These works

4 Data taken from BID area baseline, provided December 2014.

will improve the image and perception of Byres Road and create a more attractive environment against which future activity can build.

2. Area Diversity

This section examines the retail offering present in the Byres Road area and how it fits into existing planning regulations. It also offers comparison with two other city retail centres – Shawlands (Tier 2 Centre) and Finnieston (Tier 3 Centre).

Retail outlets are classified as follows:

- **Class 1**: retail sale of goods, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners, laundrettes, cold food consumption on premises, display of goods for sale, hiring out of domestic goods or articles, reception of goods to be washed;
- **Class 2**: financial, professional or any other service expected in shopping areas .e.g betting offices, lawyers, accountants, estate agents, health centres, surgeries of dentists, doctors and vets;
- **Class 3**: restaurants, cafés, snack bars (use for sale of food or drink on the premises);
- **Sui Generis**: uses not otherwise classified, including public houses, hot food takeaway, sale or display of motor vehicles, amusement centres, taxi businesses, vehicle hire; or
- **Other classes**: there are a small number of units on Byres Road that do not fit under these classifications e.g. Hilton Hotel, Grosvenor Cinema, Skills Development Scotland office.

Outlets can also be classified by retail categories which are either:

- **Convenience**: units that primarily sell goods that consumers buy frequently without having to go through a complex decision-making process e.g. food, beverages, newspapers and hot food takeaway;
- **Comparison**: units that primarily sell goods that consumers buy infrequently and that they are likely to consider multiple times before making a purchase e.g. clothing, household appliances, toys, jewellers, etc; or
- **Service**: units that provide a service or good to be consumed on-site rather than to be taken away e.g. pubs, restaurants, hairdressers, bookmakers, banks, estate agents, etc.

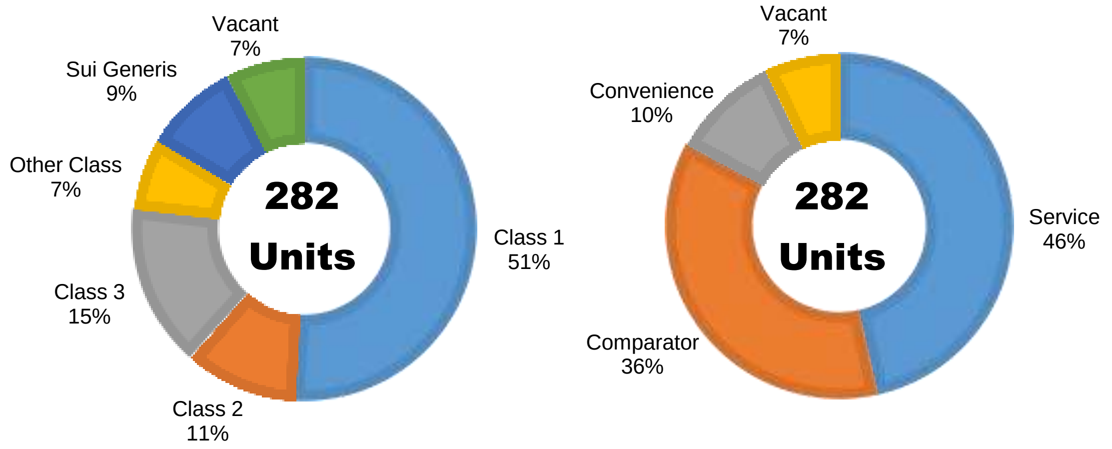
2.1 Byres Road Area

Based on data provided by BRTA, Figure 2.1 outlines the retail classifications and categories for the whole of the Byres Road area – it is important to note that this data is based on actual use of the units rather than planning classification.

Just over half of all properties are Class 1 retail units, with the remainder split fairly evenly between the remaining classifications. Byres Road's vacancy rate of 7.4%[5] is considerably below the average Scottish rate of 12.2% and UK rate of 12.3%[6].

With regards to retail categories, almost half of units provides services, whilst comparator units outnumber convenience units significantly.

Figure 2.1 Byres Road by Retails Classification



There are clear differences in the retail use between upper and lower Byres Road[7], most notably the higher use of Class 1 retail and Other Class in Upper Byres Road and a greater proportion of Class 2 and Sui Generis usage in lower Byres Road, Figure 2.2, over. Perhaps surprisingly, due to the image of the lower end being more dilapidated than the upper end, there is little difference in the vacancy rate.

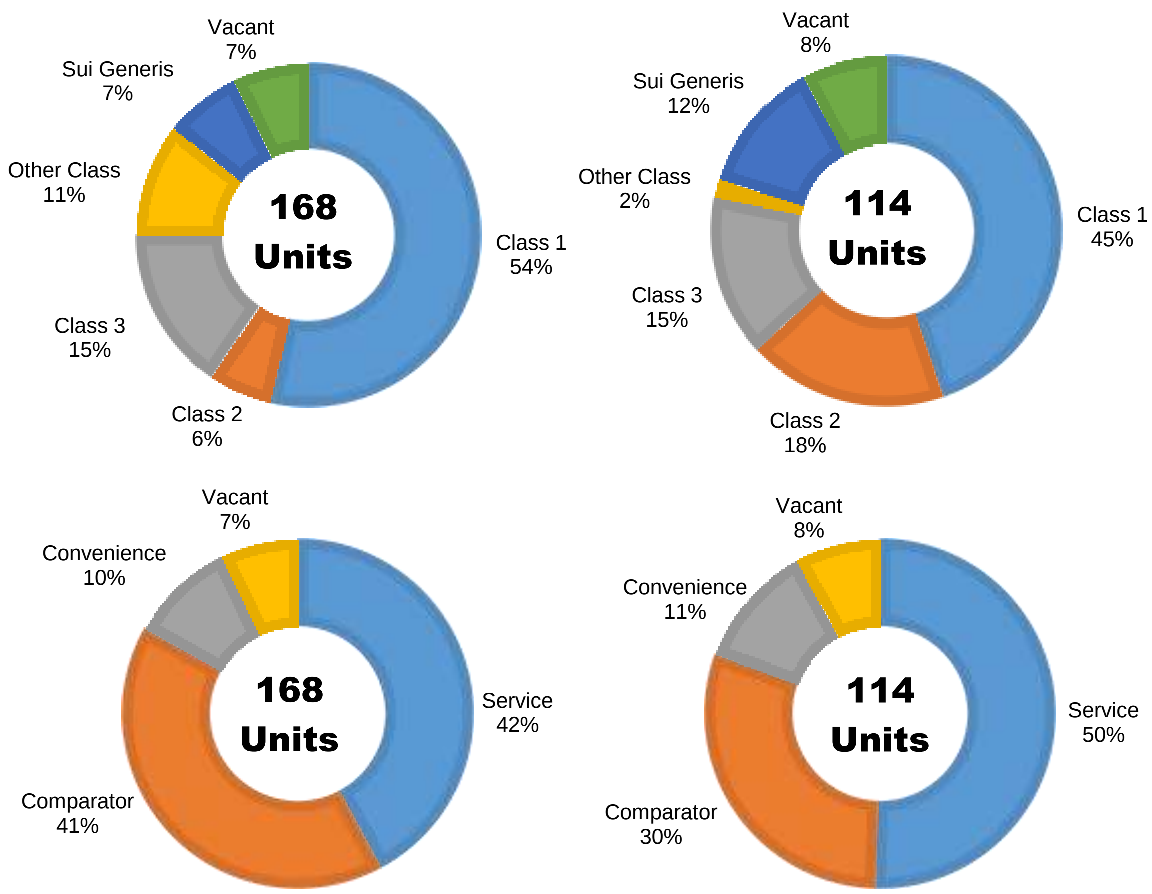
The large proportion of Class 2 uses in lower Byres Road is due to the high number of estate agents, whilst the larger number of Sui Generis units is due to a number of hot food takeaways, rather than a higher numbers of pubs. These types of units are

5 This vacancy rate is based on the database provided by Byres Road BID Manager – it records a different (slightly lower) rate than the data provided by Glasgow City Council in the vacancy analysis text.
6 http://www.localdatacompany.com/ H2 2013 – this is the most up-to-date data available at the publication date for this report, December 2014.
7 Where the dividing line is University Avenue/ Highburgh Road

indicative of a retail offering primarily servicing local demand rather than a destination centre that people will travel to.

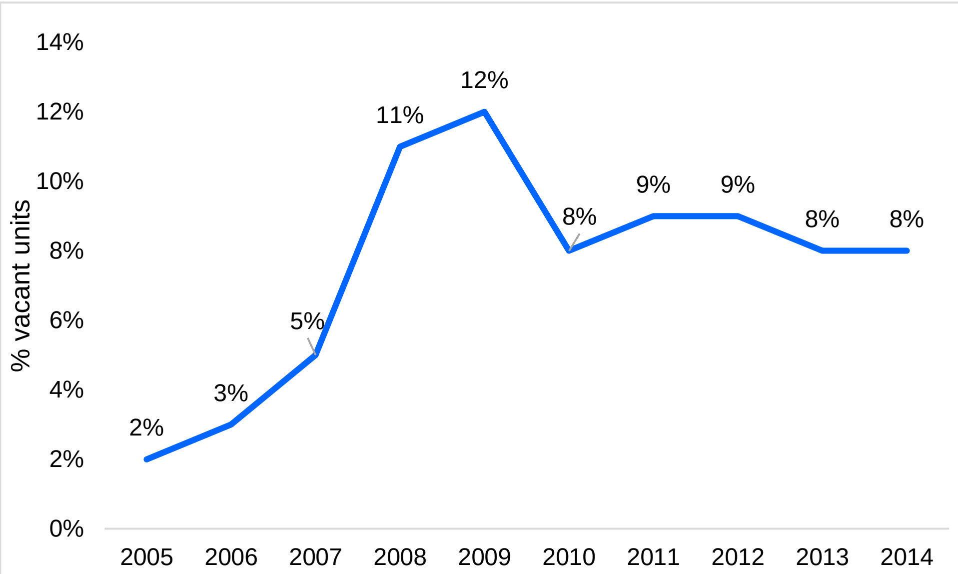
This picture is reinforced by looking at retail categories, with a higher proportion of comparison retail in upper Byres Road and higher proportion of services in lower Byres Road.

Figure 2.2 Upper (168 units) and Lower (114 units) Byres Road Retail Classification



[Figure 2.3](#), below, shows the trend for the vacancy rate on Byres Road, Ashton Lane and Cresswell Lane. The number of vacant units begins very low at just 2/3% at the start of the ten-year period, although this increases rapidly after 2008. This is likely due to the impact of the economic recession. However, it has since levelled off at around 8%. The sharp decrease after 2009 is also down to a number of units on Cresswell Lane, which were classified as vacant in 2008-9, not appearing in data for subsequent years.

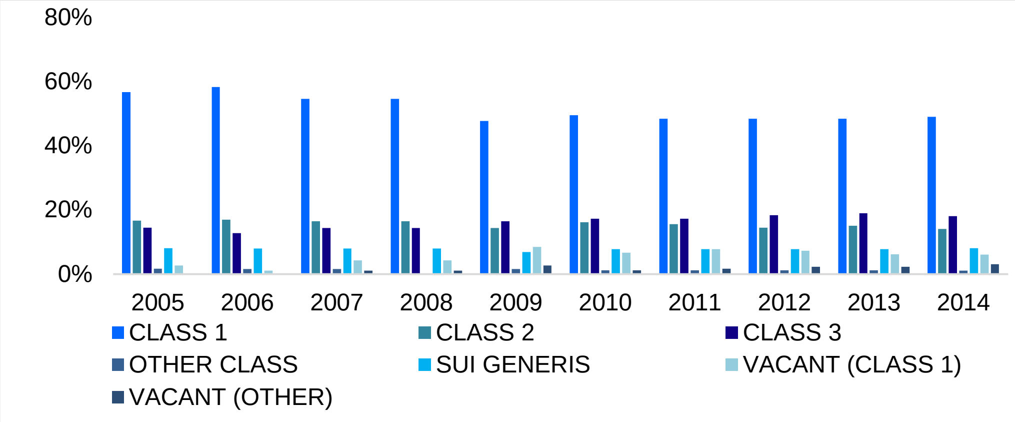
Figure 2.3 Vacancy Rates



N= varies per year between 180 and 189

Figure 2.4, over shows the composition of units over this ten year period. A trend emerges of a gradual decline in the number of Class 1 units, from 57% to 49%, while there is also a slight decrease in the number of Class 2 units. Consequently, there is an overall increase in the number of Class 3 and vacant units, while the Sui Generis category remains steady at c. 8%. A total of 38 units have been identified as 'consistently vacant', meaning they were vacant for two years or longer during the period examined. However, it should be noted that 10 of these units are on Cresswell Lane. Eleven units were vacant for four years or more, although not necessarily consecutively.

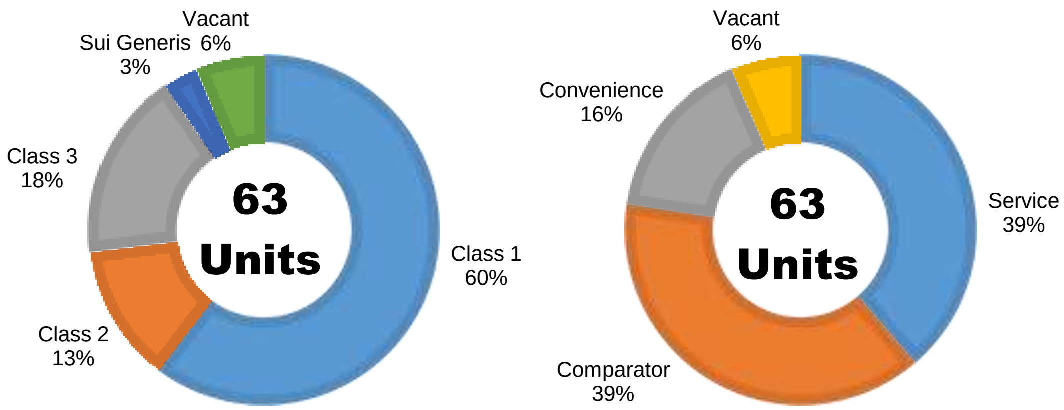
Figure 2.4 Composition of units



N= varies per year between 180 and 189

Planning regulations are in place to limit a change in character of the area, with the west side of upper Byres Road and the east side between University Avenue and Cresswell Street classified as the Byres Road Principal Retail Area and covered by stricter regulations. Figure 2.3, over, presents the class breakdown of retails units in this zone, with a larger proportion of Class 1 and Class 3 retail than Byres Road as a whole. There is also a notably larger proportion of convenience units in the principal retail area.

Figure 2.5 Principal Retail Area



The planning restrictions state that if the percentage of units that are Class 1 is below 80% then any changes of existing Class 1 premises to other uses *"will not be considered favourably"*. Exceptions are made in the cases of banks or building societies expanding into neighbouring Class 1 premises or businesses relocating from existing non-Class 1 premises within the principal retail area under the condition that the vacated premises can only be used for Class 1 activities.

The restriction is designed to maintain the number of Class 1 premises at its existing level, however, there is no pressure on non-Class 1 units to be reclassified for retail use.

There are other restrictions in place outside of the Principal Retail Area:

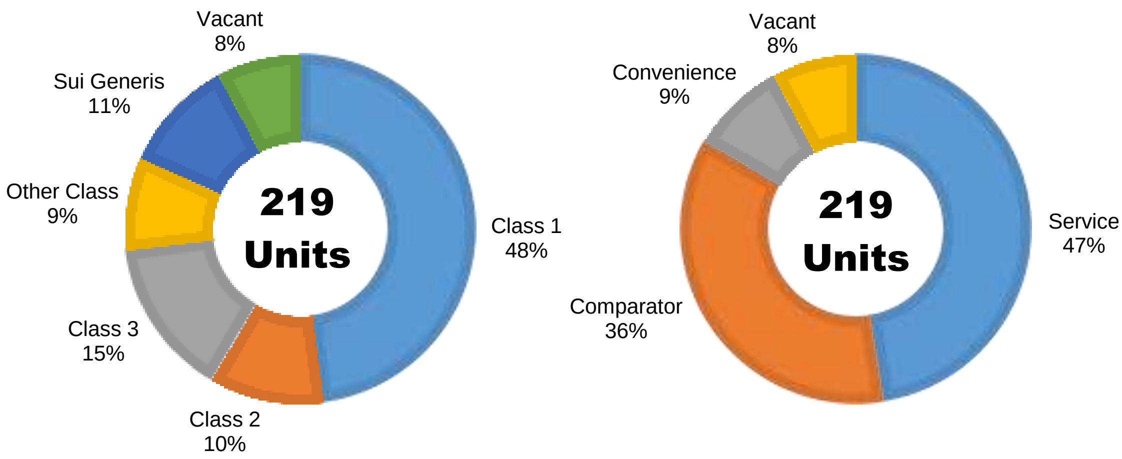
- if the proportion of Class 1 units falls below 70%, vacant units must be advertised for at least 12 months as Class 1 before consideration will be given to a change of classification, unless there is a long-term pattern of class 1 vacancy;
- if the proportion of Class 1 units falls below 50% then consideration must be given to its role as a strategic town centre; and
- two adjacent non Class 1 units are not permitted within a street block and more than 30% of class 1 units in a given block should not be in non-retail use, unless there are significant vacancy problems.

Planning restrictions outside of the Principal Retail Area are considerably more flexible, whereby Class 1 units can be changed to another classification if evidence of a lack of demand for Class 1 units can be provided. This may partially explain the comparable levels of vacancy within the Upper and Lower sections of Byres Road, as per Figure 2.2.

Figure 2.6 shows the class breakdown of retail units outside the Principal Retail Area. This shows considerably less Class 1 units than the Principal Retail Area, mostly due to the higher numbers of Other Class and Sui Generis units. The numbers of Class 1 units combined with the vacant units[8] gives a percentage of Class 1 at 56%, therefore the 70% status, as outlined in the previous bullet points, applies.

8 In our analysis we have assumed that all vacant units are classified as Class 1.

Figure 2.6 Units Outwith the Principal Retail Area



The combined 56% Class 1/vacant uses equates to only 13 units above the 50% threshold whereby consideration of town centre status would need to be given, therefore any further change away from Class 1 should be considered carefully.

Both within and outwith the Primary Retail Area, the number of Class 1 units is far below the level for which planning regulations apply. Within the PRA 66% of units appear to be Class 1/vacant against a target of 80%, whilst outside the PRA 56% are Class 1/vacant with a target of 70%.

The fact that this is so far away from the target suggests that there is an issue in relation to the demand for Class 1 retail, against demand for other uses on Byres Road. This needs to be considered in relation to the resurgence of areas like Finnieston and sustained occupation of areas like Shawlands – in reviewing these areas it is clear that bars, restaurants and cafés play an important role both in occupying properties, and also in generating footfall.

It is therefore important that GCC reviews its 80/20 policy for Byres Road to ensure that the area continues to compete effectively for occupiers. This policy may no longer be appropriate given:

- changes in retail patterns from consumers – particularly the significant rise in online shopping, with further growth forecast;
- rise in demand for food & drink outlets and for beauty/personal services i.e. items and services that cannot be purchased online; and

* recognition from a wide range of industry commentators that retail can no longer be relied upon as the primary sector for town centres – this is covered by the Scottish Government under the 'Pro-active Planning' theme in its response[9] to the National Review of Town Centres, 2013. Within this review the Government *"fully embraces the review recommendation for a simple, encouraging and pro-active planning policy in support of town centres"* and *"Our intention is to ensure that planning policy is efficient, inclusive, fit for purpose and sustainable to enable action for our town centres"*.

As shown in the vacant unit trend analysis (Figure 2.4) the percentage of Class 1, and to a lesser extend Class 2, units has been gradually decreasing over recent years, mirrored by a rise in Class 3 units.

2.2 Shawlands

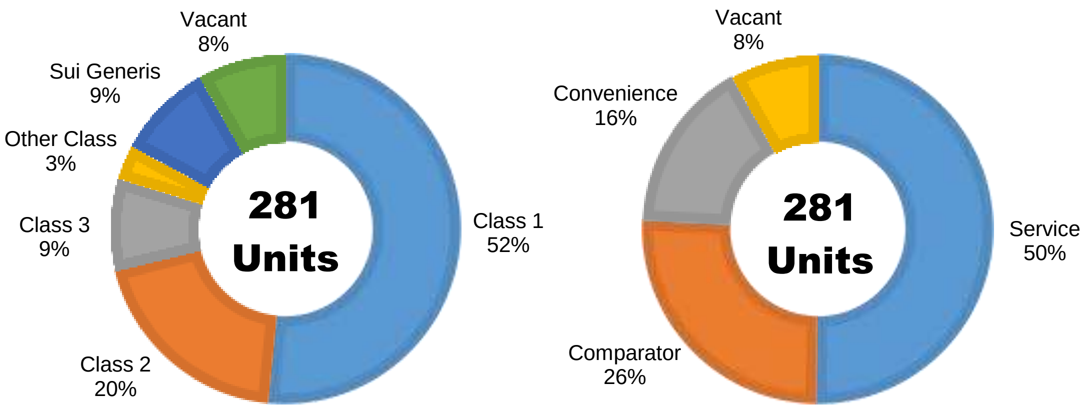
Shawlands, like Byres road is a Tier 2 town centre, containing a principal retail area with the same planning restriction as discussed above. In Shawlands' case the principal retail area is 14 – 128 Kilmarnock Road and all of Shawlands Arcade.

Based on data gathered by EKOS in 2012, Shawlands has a slightly higher proportion of Class 1 units and a particularly large proportion of Class 2 units compared to Byres Road. On the other hand there are fewer Class 3, Other Class and Sui Generis units. Vacancy rates are slightly higher in Shawlands, Figure 2.6.

Furthermore, Shawlands has much less comparison retail units and more convenience and service units, indicating that a greater proportion of the retail space in Shawlands is used for servicing local needs.

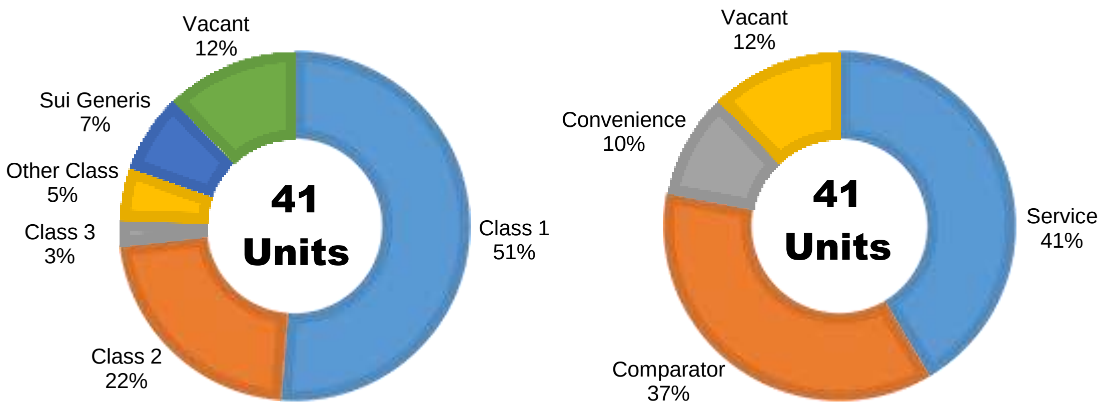
9 National Review of Town Centres, Town Centre Action Plan – the Scottish Government response, 2013 http://www.scotland.gov.uk/Resource/0043/00437686.pdf

Figure 2.6 Shawlands by Retail Classification



Compared to Byres Road and Shawlands as a whole, the Shawlands Principal Retail Area is struggling, with fewer Class 1 units than the wider area, higher vacancy rates and higher number of Class 2 premises, Figure 2.7.

Figure 2.7 Shawlands Principal Retail Area



Overall, Byres Road has a much stronger night time offering in terms of bars and restaurants than Shawlands. However, there is a similar proportion of Class 1 retail units and vacancy rates between the two areas, indicating similar levels of retail demand. The higher preponderance of comparison retail units indicates that Byres Road is more of a retail destination that a servicer of local demand.

With regards to the principal retail areas, Byres Road performs better, likely due to the interior of Shawlands Arcade having high level vacancy at the time of the survey.

2.3 Finnieston

Finniestion is classified as a Tier 3 town centre and is called Cranstonhill/Yorkhill in the City Plan 2, but is more commonly known as Finnieston. The area has recently gained a reputation for its lively and vibrant night time economy[10], spurred by its proximity to the SECC and the newly constructed Hydro, and cheaper rents/rates compared to Byres Road.

Finnieston has a large proportion of Class 3 and Sui Generis uses, while retail is primarily geared towards local residents, with a high proportion of convenience over comparison outlets, barring the PC World, Staples and car showrooms around the Exhibition Centre Train Station. There has, however, been a recent trend towards small 'quirky' and vintage shops of the type for which Byres Road is famous.

With its rapidly evolving offer of bars and restaurants, the Finnieston area is now increasingly recognised as a vibrant evening destination, with the offering at Byres Road seeming somewhat conservative by contrast. Further growth at Finnieston will, however, likely be constrained by its narrow and cluttered pavements, and the high traffic volume on Dumbarton Road that can make it difficult to cross.

[10] As can be seen in The Guardian and The Herald

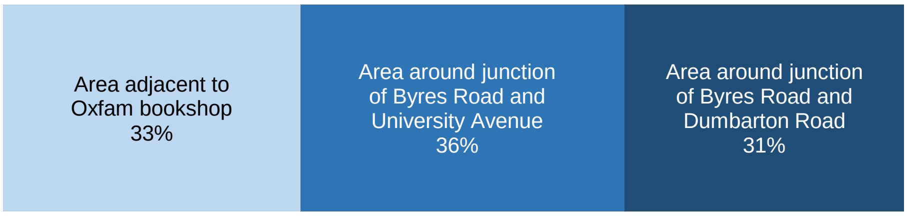
3. Shopper Survey

3.1 Introduction

An in-street survey was conducted at three locations in Byres road between 28th May and 3rd June. A total of 200 people were randomly surveyed.

Roughly one third of respondents were interviewed at the three locations, with slightly more interviews at the middle of Byres Road and slightly less at the Dumbarton Road end, Figure 3.1.

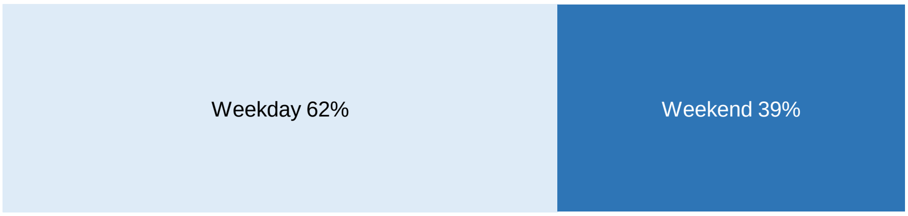
Figure 3.1 Location of Interview



N=200

More interviews were conducted on weekdays, however proportionately more were conducted on weekends with 39 per day compared to 25 per day during the week, Figure 3.2.

Figure 3.2 Day of Interview



N=200

Almost all of the interviews (86%) were conducted between 12pm and 5pm with 10% conducted before 12pm and 5% between 5pm and 7pm.

3.2 Respondent Profile

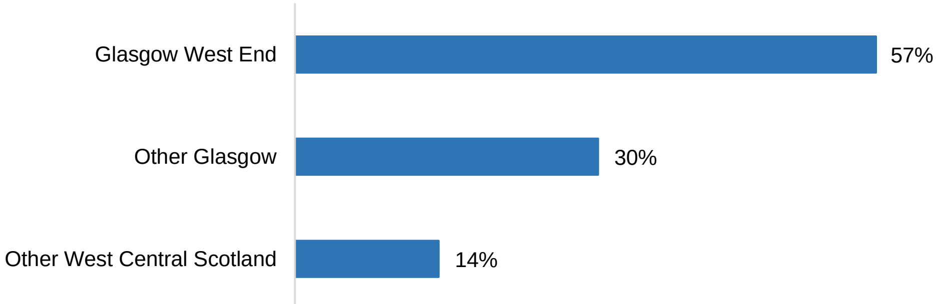
A higher number of females were interviewed than males, with around three fifths of respondents being female, Figure 3.3.

Figure 3.3 Gender

N=200

Over half of those surveyed lived locally, with around one third coming from other parts of Glasgow and the remainder outside of Glasgow, but within West Central Scotland, Figure 3.4.

Figure 3.4 Area of Residence

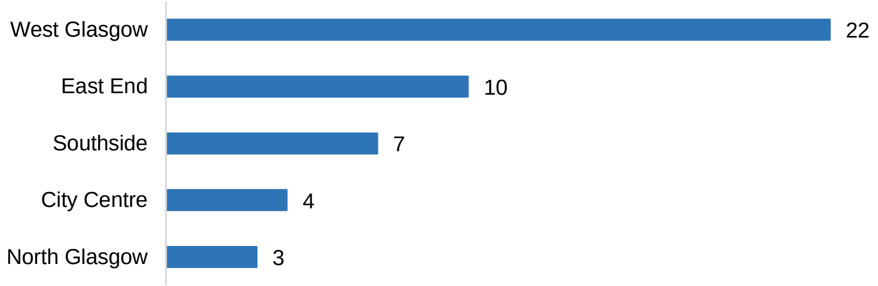


N=200

Of those residing other parts of Glasgow, almost half (47%) lived in the west of the city, indicating that Byres Road is a major shopping centre for the wider west end[11] area, Figure 3.5.

[11] Areas included were Anniesland, Bearsden, Clydebank, Drumchapel, Kelvindale, Maryhill, Partick and Yorkhill

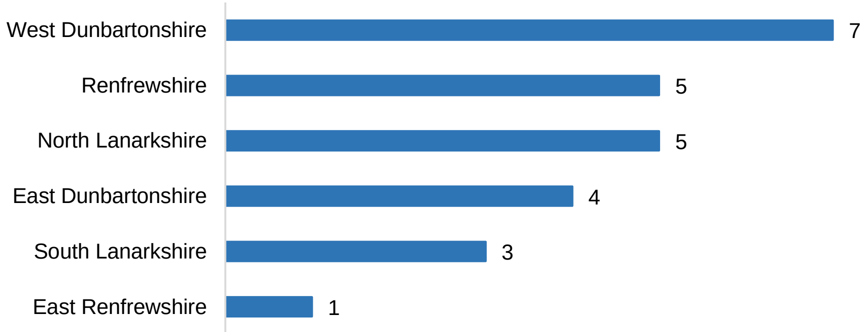
Figure 3.5 Area of Residence, Other Glasgow



N=46

As with the others in Glasgow, visitors from the rest of Scotland were more likely to come from the West[12] (52%), Figure 3.6.

Figure 3.6 Area of Residence, Other West of Scotland

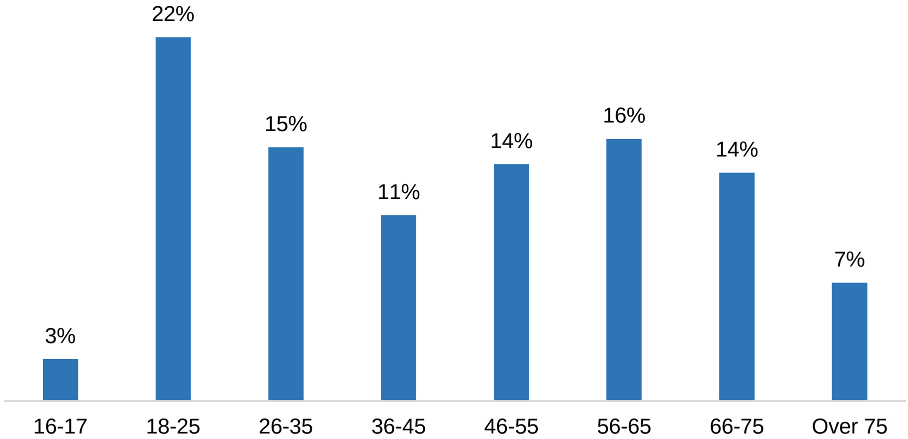


N=25

The age of respondents is relatively evenly spread over the age groups with slightly more in the 18-25 bracket, Figure 3.7.

[12] Defined as West Dunbartonshire, Renfrewshire and East Renfrewshire

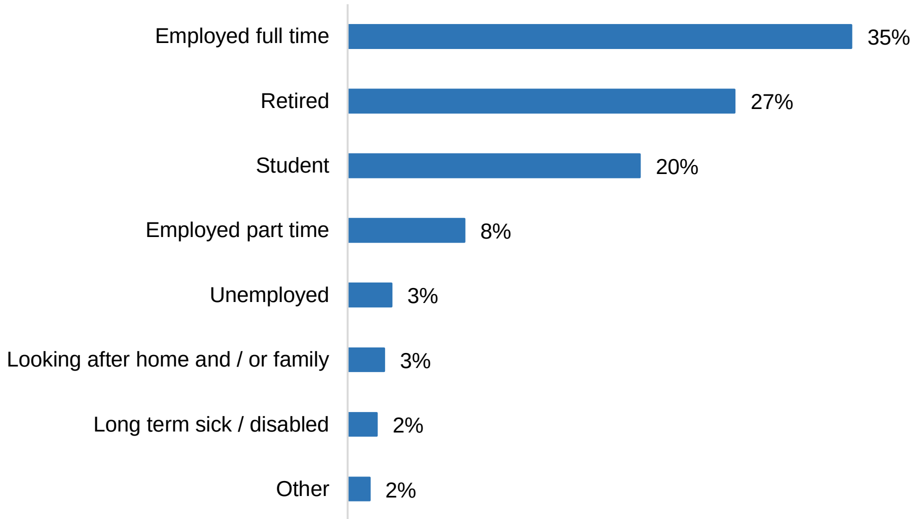
Figure 3.7 Respondent Age



N=200

Most respondents are either employed full-time, retired or in full time education, Figure 3.8.

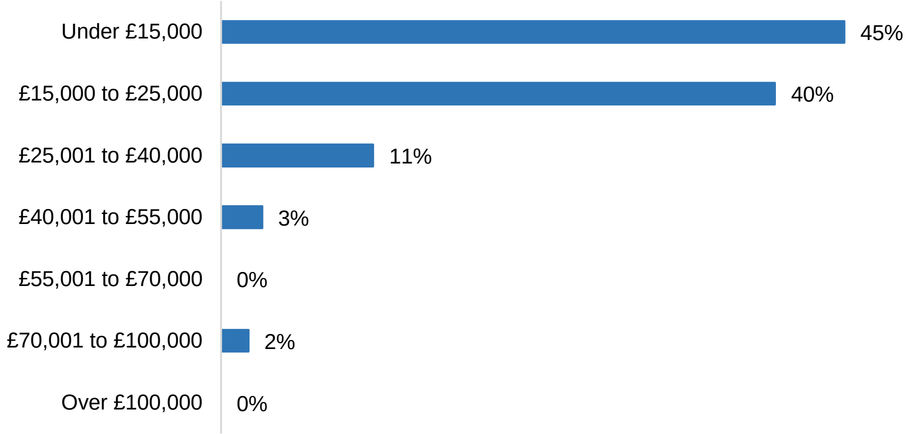
Figure 3.8 Employment Status



N=196

The annual household income of almost all (85%) of those who specified was £25,000 or under, however, almost half (49.5%) preferred not to specify their income, Figure 3.9.

Figure 3.9 Household Income



N=101

The figure records very low average annual household income for respondents. Using midpoint range assumptions[13] we have estimated the average household income of respondents at around £19,000, well below the median Scottish household income in 2012/13 at £23,000[14].

Given the socio-economic analysis presented at Chapter 4, and in particular the SIMD analysis (Section 4.8) we would have expected a higher than average household income for shoppers in the Byres Road area. Three factors in particular are likely to have influenced the results:

- people are often unwilling to disclose their income, our experience suggests that this is more likely for those at the upper end of the spectrum – in this instance half of all respondents did not disclose;
- almost half of all respondents (47%) were either retired or students, with only 35% being full-time employees – this compares with Scottish/Glasgow average of 24% and 25% respectively, and with the socio-economic profile for the area (as covered at Section 4) of 30% retired/student residents; and
- there were a large number of student respondents to the survey and also a large number of flats and HMOs in the catchment area (see Section 4.7) – it is likely that a sizeable proportion of respondents will be reporting individual incomes in response to this question.

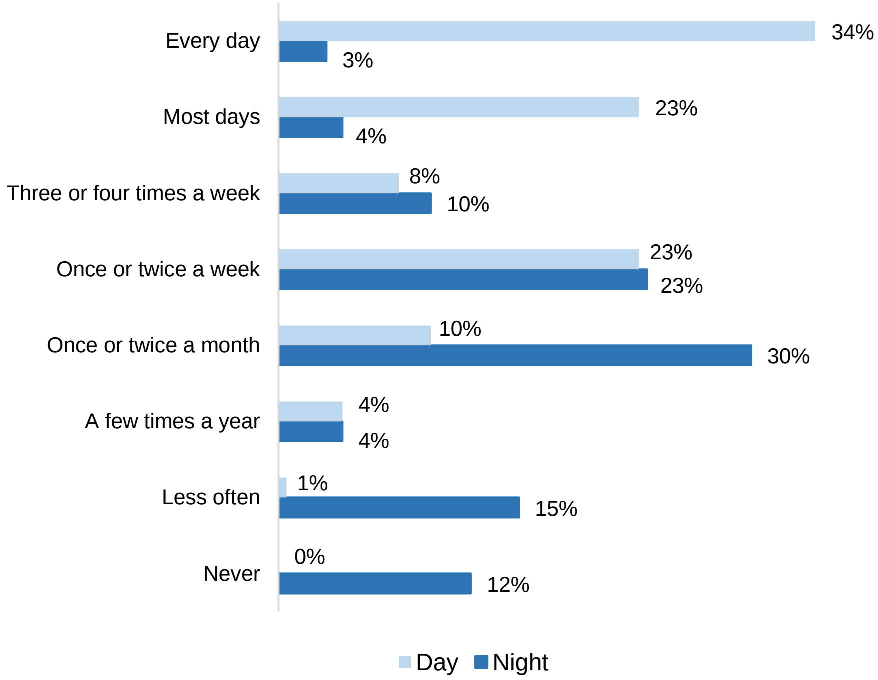
13 We have assumed £10,000 income for the 'Under £15,000' range.
14 Source: Poverty and Income Inequality in Scotland: 2012/13, Scottish Government.

We therefore suggest that average income for Byres Road shoppers is likely to be higher than that indicated at Figure 3.9 above.

3.3 Frequency of Visits

Figure 3.10, shows how often respondents visit Byres Road both during the day and at night, with respondents visiting much more frequently during the day. However, this corresponds with most of the interviews being conducted during the day.

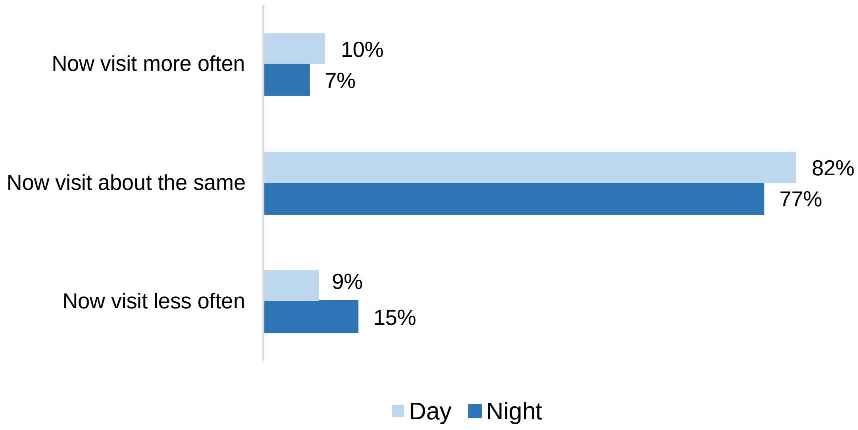
Figure 3.10 Frequency of visit



N=200

The majority of respondents visit Byres Road about the same as ever, both day and night, however, more people are visiting less than more often at night (15% compared to 7%), whilst the opposite is the case for day visitors (10% compared to 9%), Figure 3.11.

Figure 3.11 Change in Frequency of Visit



N=200

Tables 3.1 and 3.2 list the most common reasons for a change in the frequency of visits, with people in general visiting more often due to a change in circumstances, whilst people visit less often due to going elsewhere or not going out at all.

Table 3.1 Reason for change of Visits Frequency - Day

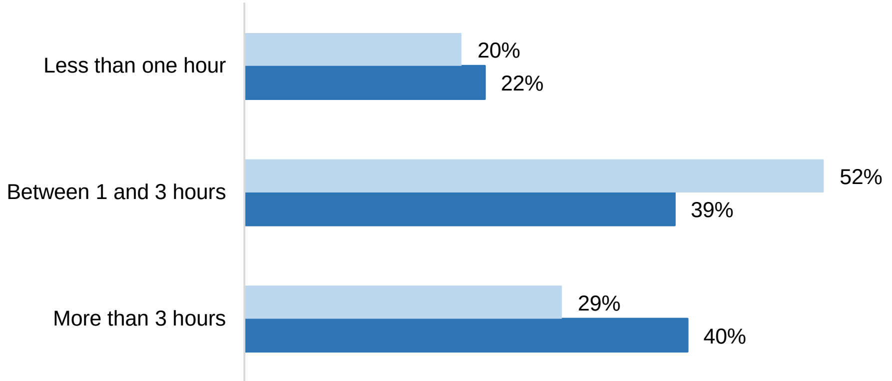
More often (19)	**Less often (15)**
Work here now (eight)	Busy with work/ study (four)
Like the shops (three)	Go elsewhere (two)
Friends/ family live here now (two)	Lower income (two)
Now retired – have more time (two)	Getting older – not as fit (two)

Table 3.2 Reason for change of Visits Frequency - Night

More often (11)	**Less often (26)**
Friends/ family live here now (three)	Don't go out as much anymore (seven)
Like the restaurants/ bars (three)	Prefer to go elsewhere (seven)
It's local (two)	Getting older – not as fit (three)

Few visitors (around one fifth) spend less than an hour on a typical visit, with visitors at night tending to make longer visits, Figure 3.12.

Figure 3.12 Length of time spent on typical visit



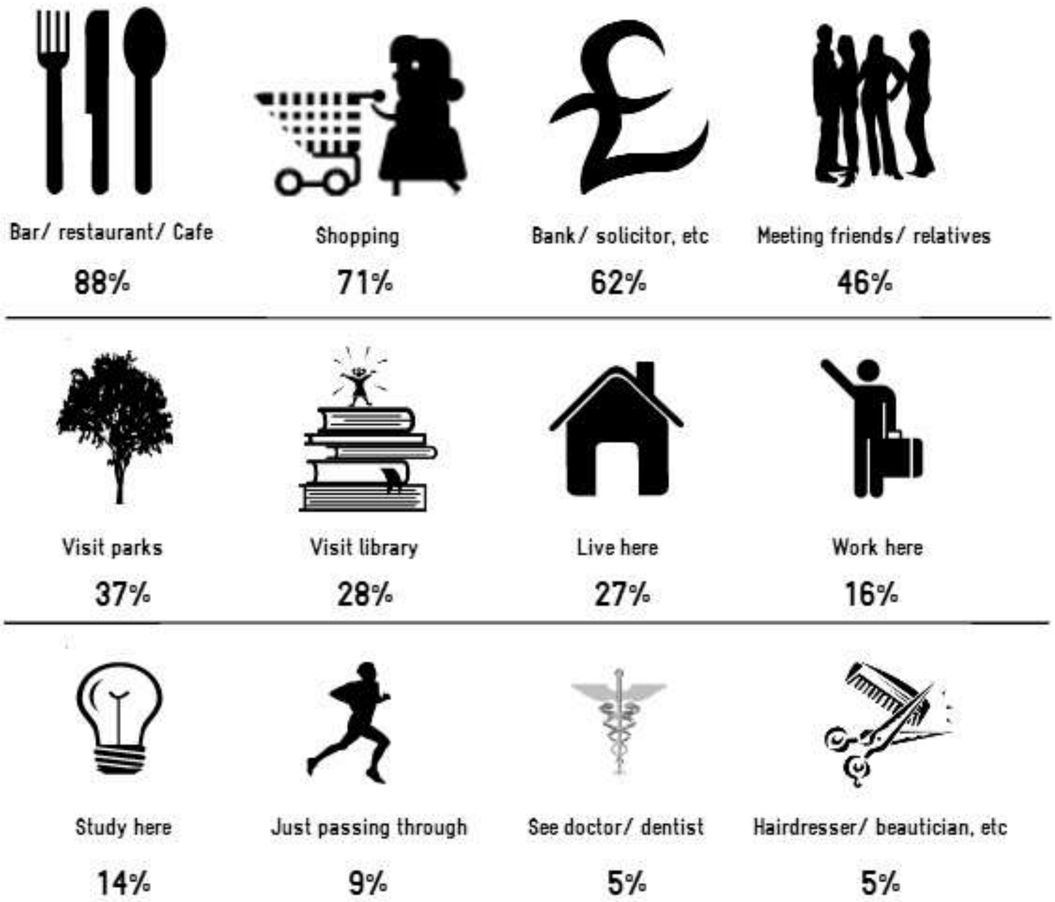
Day N=200, Night N=176

3.4 Reason for visiting

The most popular things to visit Byres Road for are bars/restaurants/cafes, shopping and bank/solicitor etc, Figure 3.13.

The figure outlines responses to a range of potential uses, recording the number of instances that respondents visit for that purpose. This question allowed multiple responses to be made, therefore undertaking wider analysis we can show that an average trip to Byres Road includes elements of bar/restaurant /café, shopping, bank/solicitor and meeting friends/relatives. In total 56% of all respondents selected three out of these four reasons to visit, while a fifth of respondents selected all four.

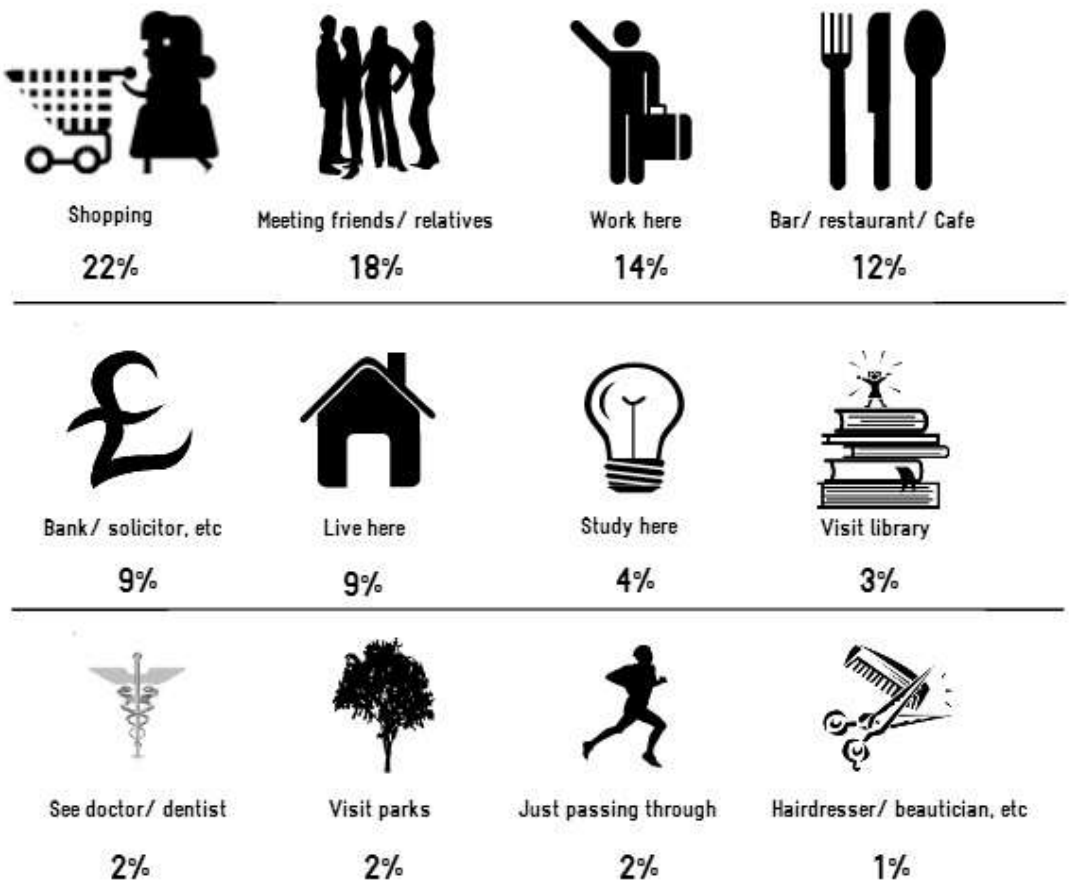
Figure 3.13 Reason for Visit



N=199, Multiple answers possible

However, when asked about their primary reason for visiting Byres Road, where only one single purpose was allowed, shopping becomes the most dominant, whilst reasons due to proximity to friends, family, employment and residence become much more important, Figure 3.14.

Figure 3.14 Primary Reason for Visit

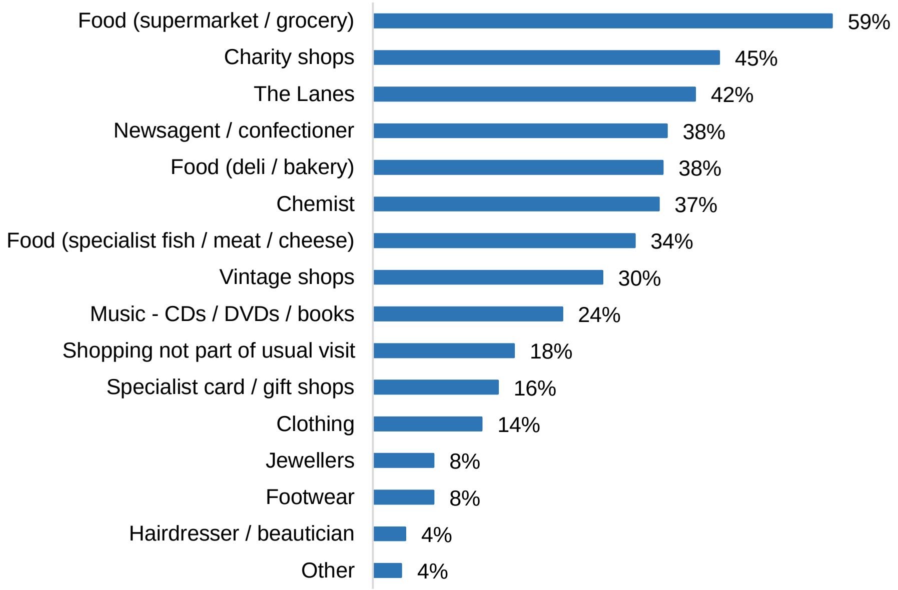


N=195

The most popular types of shops visited on Byres Road are the supermarkets, with more than half of respondents using these. Other convenience retail shops were also popular, with over one third using newsagents and other food shops. Of the comparator shops, the most popular are charity shops, closely followed by the small independent shops common in the Lanes, Figure 3.15.

This figure outlines responses to a range of potential retail functions, recording the number of instances that respondents visit for that purpose. This question allowed multiple responses to be made, therefore undertaking wider analysis we can show that a common shopping trip to Byres Road includes elements of supermarkets, charity shops, the shops in the lanes and newsagent/confectioners – 33% of respondents normally visit at least three of these.

Figure 3.15 Types of shop visited



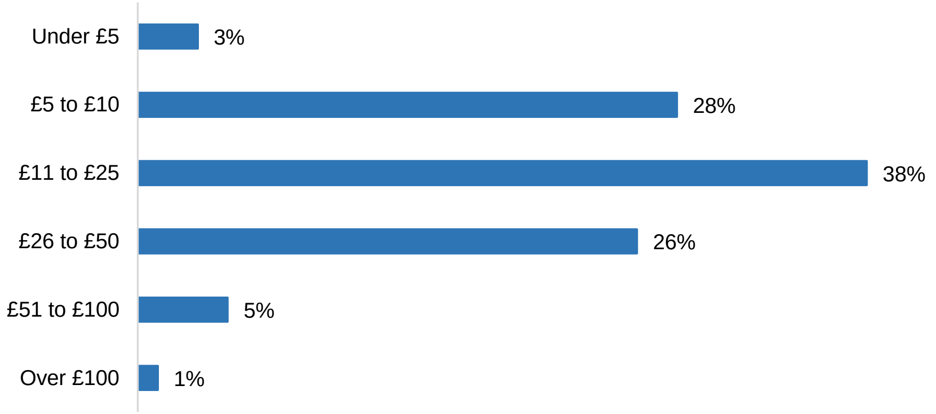
N=192

The importance of having friends, working or living near Byres Road and the popularity of supermarkets, newsagents and other food shops indicate that convenience shopping is more important to Byres Road that the number of units outlined in Chapter 2 suggests, perhaps due to the large number of customers concentrated in the small number of supermarkets.

The most common typical spend is between £11 and £25 (38%), with similar numbers of respondents spending between £5 and £10 (28%) and between £26 and £50 (26%), Figure 3.16.

Using mid-point range analysis we have estimated that the average spend per head per trip for survey respondents is around £25. This is comparable with survey results for other in-street shopper surveys that EKOS has undertaken, and is within the typical range of people on a day-trip.

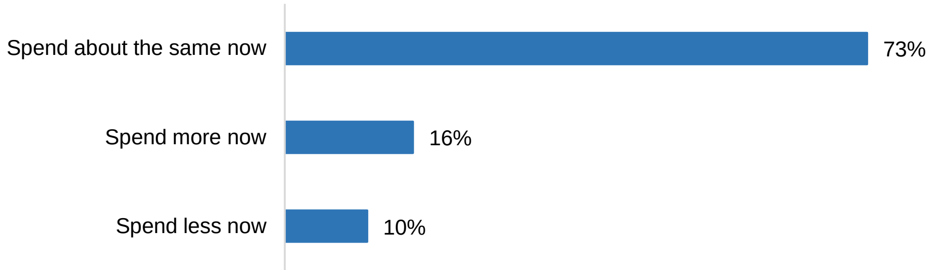
Figure 3.16 Typical Spend



N=194

Around three quarters of those that have shopped in Byres Road spend about the same as they did three years ago, with slightly more respondents spending more money rather than less, Figure 3.17.

Figure 3.17 Change in Spend



N=173

The respondents that spend more money now on a typical trip record an average of £25 per trip (ranging from £4 to £60); whilst those that spend less now record an average of £15 (ranging from £10 to £30).

Table 3.3 outlines the reasons people have changed their spending with the most common causes being a change in income or prices.

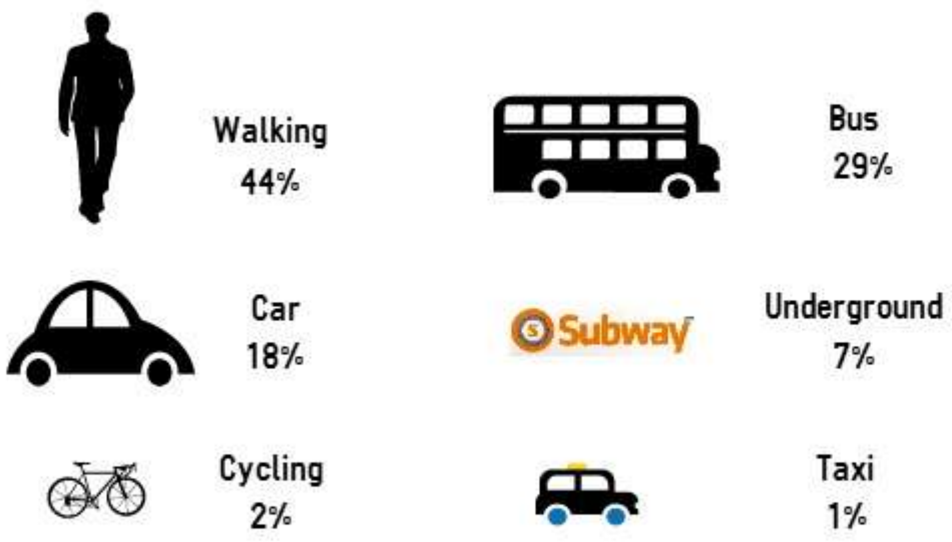
Table 3.3 Reasons for Change in spend

Spend More (28)	Spend Less (18)
Higher prices (seven)	Fall in income (12)
Prefer to shop locally (four)	Go elsewhere (five)
Increased income (four)	
In the area more often (three)	
More things to buy (two)	

3.5 Transport and safety

The most popular method of travelling to Byres Road was walking, with most of these people living locally. The other popular methods of transport were bus, car and underground, Figure 3.18, with travellers coming from a variety of locations.

Figure 3.18 Methods of Transport



N=195

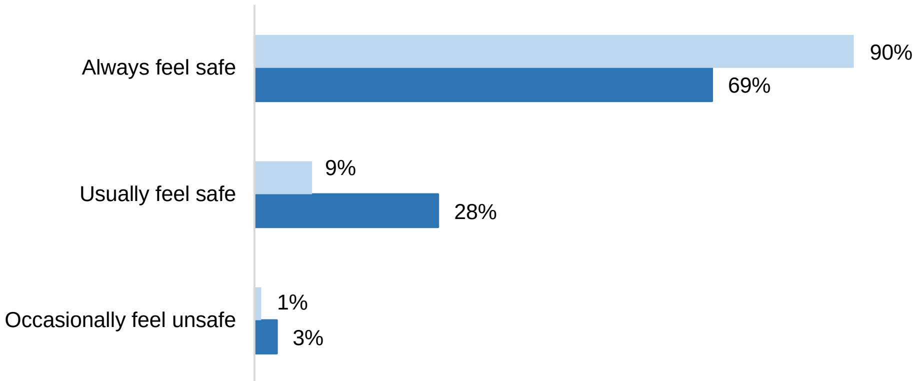
Just over half of those who drive to Byres Road reported that they find it difficult or very difficult to park, Figure 3.19.

Figure 3.19 Ease of Parking

N=35

The vast majority of people always or usually feel safe in Byres Road both day and night, however, there is a substantial minority (28%) who usually feel safe rather than always feel safe at night, Figure 3.20.

Figure 3.20 Safety

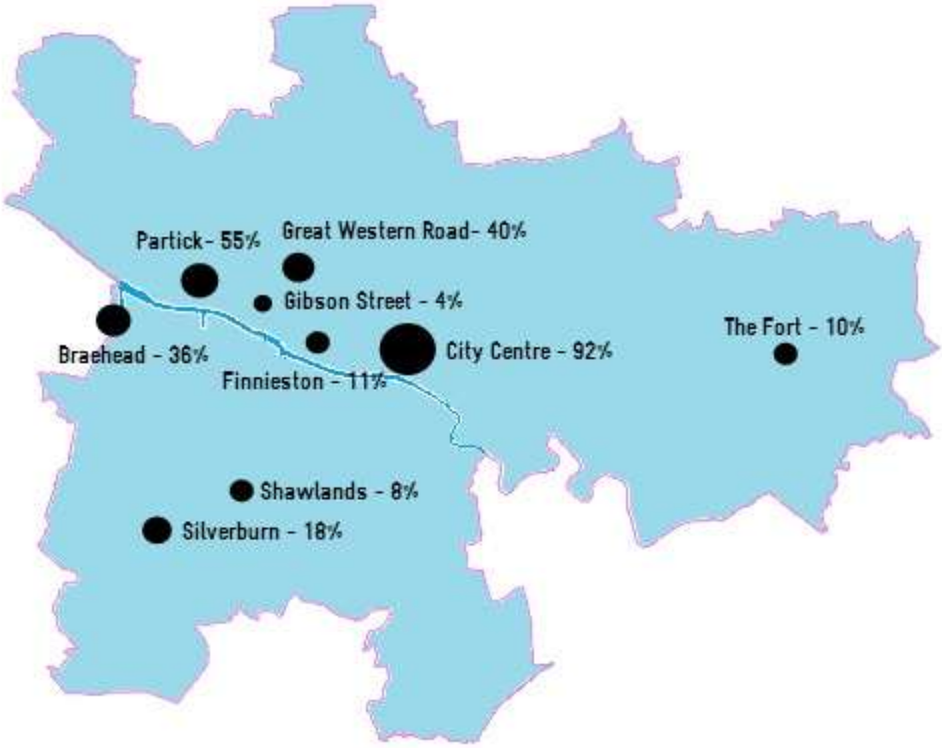


Day N=196, Night N=177

3.6 Competitor Areas

The most popular places where respondents go shopping regularly are the City Centre, Partick, Great Western Road and Braehead, Figure 3.21.

Figure 3.21 Alternate Shopping Destinations

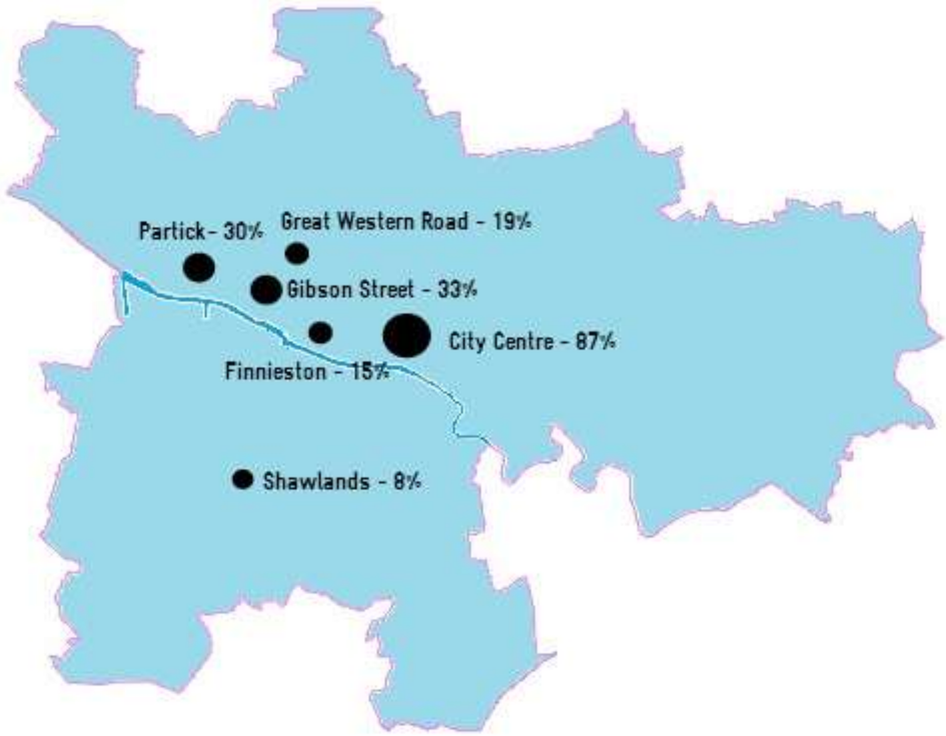


N=197

With regards to nights out, the City Centre remains by far the most popular, followed by Gibson Street and Partick, with Great Western Road and Finnieston also being frequent destinations, Figure 3.22.

As reported at Section 2.3, Finnieston has significant potential to grow as an attractive evening destination with a wide range and vibrant selection of bars and restaurants (Class 3). The growing reputation of this area, together with its proximity to the SECC, Clyde Auditorium and Hydro performance venues, means that it will increasingly compete for customer footfall (particularly evening economy users) who might otherwise have traditionally gone to the Byres Road area.

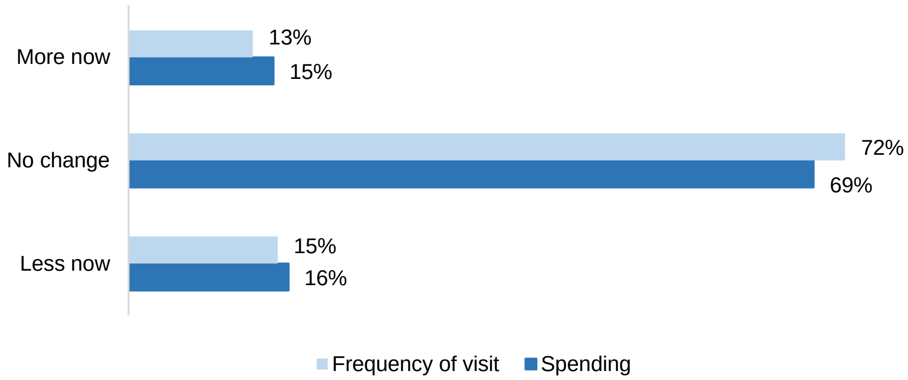
Figure 3.22 Alternate Night Out Destinations



N=177

Almost three quarters of respondents frequent these other locations as much as they did three years prior. Similar proportions frequent and spend more or less in the other locations, Figure 3.23.

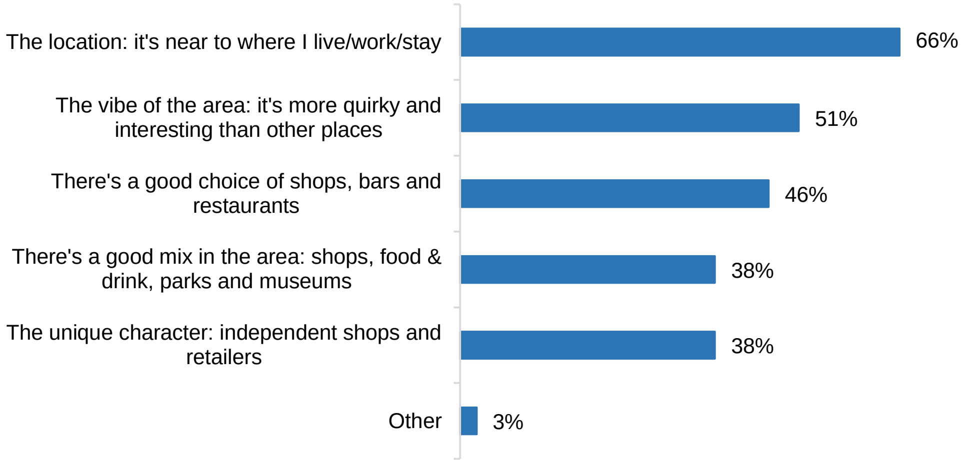
Figure 3.23 Changes in Frequency of Visit and Spending in other Locations



N=199

The most important reason for people visiting Byres Road over the other locations is its proximity to their house or workplace, with the vibe of the area the next most significant factor, Figure 3.24.

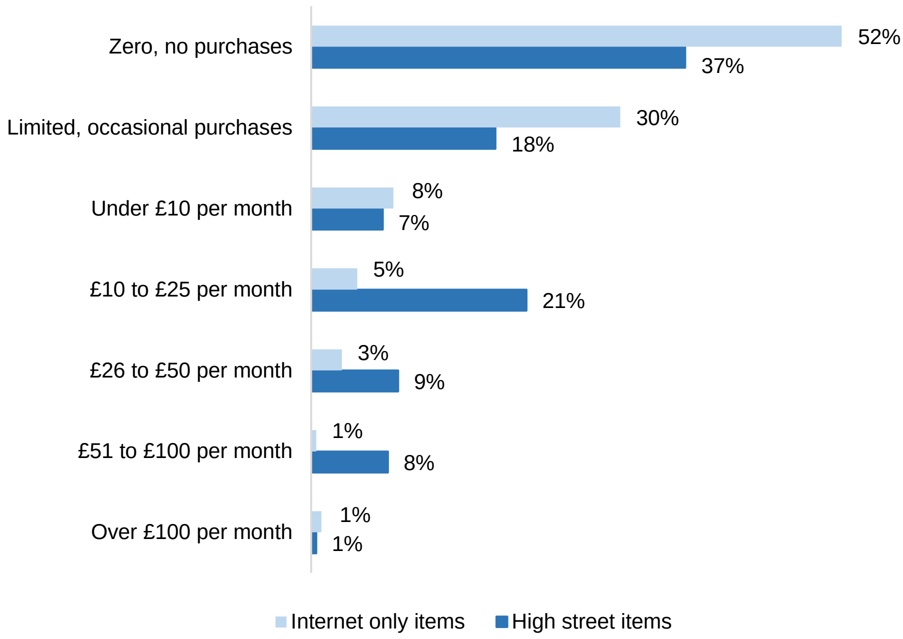
Figure 3.24 Reasons for Visiting Byres Road over other Locations



N=200

The majority of people make limited or no internet purchases of high street goods (55%) or internet only goods (82%), Figure 3.25.

Figure 3.25 Internet Purchases

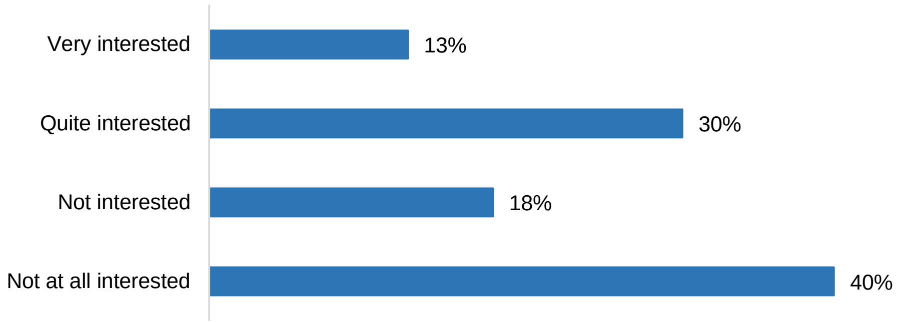


N=198

Younger respondents were found to be much more likely to shop online. A total of 68% of under-35s shop online every month, with a further 15% making less regular purchases. In comparison, only 18% of over-55s buy items online on at least a monthly basis, with 65% of respondents from this age category stating that they never shop online.

Opinion was mixed on the desirability of a click and collect service in Byres Road with 43% interested and 57% not, Figure 3.26. Some online order collection services are already available on Byres Road. This includes Waitrose, which offers collections for John Lewis orders, and McColls newsagent, which offers the Collect Plus parcel service that a number of online retailers use.

Figure 3.26 Click and Collect Interest



N=167

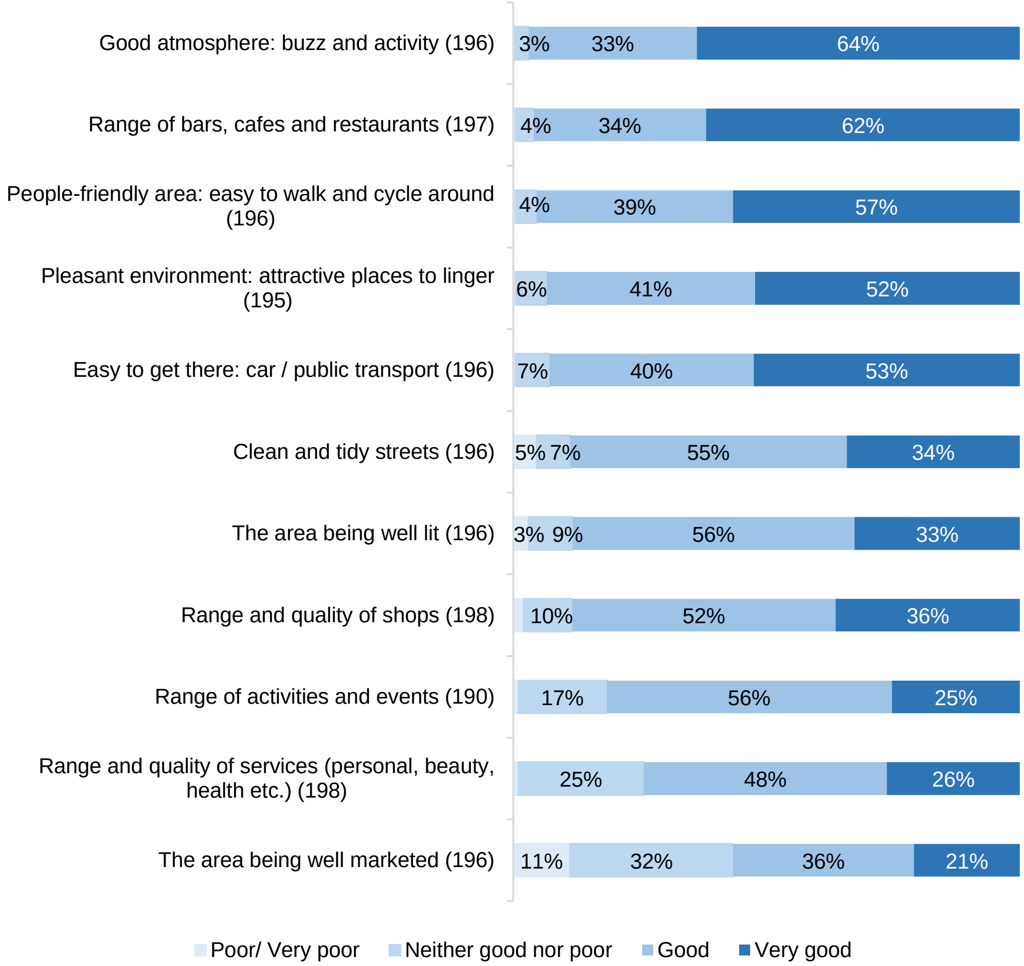
3.7 Views and Opinions

Figure 3.27 outlines respondent's views and opinions on various aspects of Byres Road. People were generally positive about everything with over 74% rating all but one measure as good or very good.

Five of the aspects were rated good or very good by over 90% of respondents and these were the atmosphere, the range of bars, cafes and restaurants, people friendly area, pleasant environment and easy to get there.

The one aspect that received any significant negativity was whether the area was well marketed with 11% rating it as poor and 32% rating it as neither good nor poor.

Figure 3.27 Ratings of Byres Road



The most significant factor that would encourage more visits, both day and night, would be better environment: seats, pavement and greenery. Further factors that would encourage day visitors would be a wider range of shops, less traffic and better parking, Table 3.4.

There is less consensus on what would encourage more visits at night, but the most mentioned were a safer environment and less traffic.

Table 3.4 Factors That Would Encourage More Visits

	Day (131)	Night (86)
Better environment: seats, pavements, greenery	45%	44%
Wider range of shops: type and quality	26%	10%
If there was less traffic	24%	16%
Better parking: more spaces, cheaper cost	21%	10%
More events and activities: fair, market days etc.	11%	13%
Safer environment: lighting, policing, security	9%	17%
If it was easier to walk and cycle around	7%	5%
Other	7%	7%
Less charity shops	5%	0%
Less beggars	5%	3%
More cafes, bars and restaurants: type and quality	5%	6%
Choice of personal services: hairdressers / beauty	2%	0%
Better public transport links	2%	5%

The factors that discourage visitors are similar to those in the previous question, with the most important being a poor environment: seats, pavements and greenery. However, night time visitors are slightly more put off by a poor environment in terms of lighting, policing and security, which ties in with Figure 3.20, where concern was expressed regarding safety at night, Table 3.5, over. Other factors discouraging day visitors are traffic and poor parking whilst night visitors are put off by the choice of cafes, bars and restaurants and poor parking.

Table 3.5 Factors That Discourage More Visits

	Day (108)	Night (79)
Poor environment: seats, pavements, greenery	45%	33%
Too much traffic	20%	6%
Poor parking: amount cost, location	19%	10%
Choice of shops: type and quality	9%	3%
Too many beggars	8%	5%
Poor environment: lighting, policing, security	6%	37%
Choice of cafes, bars, restaurants - type and quality	6%	13%
Other	4%	5%
Too many charity shops	2%	0%
Poor infrastructure for cycling	2%	3%
Poor transport links	1%	5%
Choice of personal services: hairdressers / beauty	1%	1%

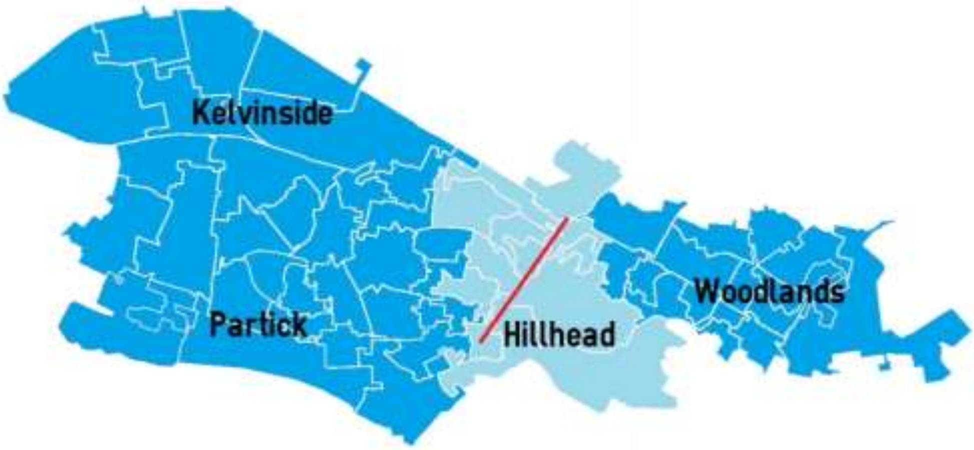
4. Socio-Economic Baseline

4.1 Introduction

This section presents a statistical baseline of demographic and economic features of Byres Road, the surrounding area and Glasgow. Part of this will update an existing baseline conducted in 2003, however this baseline will examine a greater number of issues than were addressed there.

The Byres Road area is made up of eleven datazones[15] in the immediate areas of Byres Road, whilst the Wider Area is made up of ten postcode districts[16]. Figure 4.1 presents the area covered by Byres Road (light blue) and the Wider Area (dark blue).

Figure 4.1 Area Map



Postcode sector data is not always available for a number of measures, and therefore the multi-member wards of Hillhead and Partick West will be used as a substitute.

[15] S01003460, S01003470, S01003484, S01003497, S01003509, S01003513, S01003514, S01003521, S01003522, S01003542, S01003545, S01003555

[16] Kelvinside: G11 5, G12 0, G12 9, G20 8, Hillhead: G12 8, G20 6, G3 6, G3 7, Partick: G11 6, G3 8

4.2 Population

Current

Population across all three areas has increased over the last ten years, with Byres Road and the Wider Area growing at about double the rate of Glasgow as a whole, Table 4.1. Due to the unavailability of postcode sector data, the alternative definition of the Wider Area is used for population data.

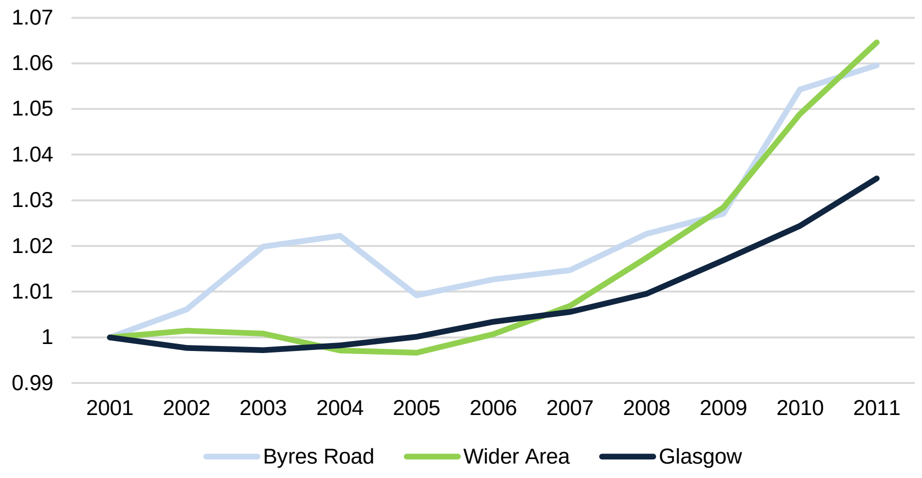
Table 4.1 Population

	2001	2006	2011	Change	%
Byres Road	9,933	10,059	10,525	592	6%
Wider Area	55,317	55,355	58,890	3,573	6%
Glasgow	578,710	580,690	598,830	20,120	3%

Source: Scottish Neighbourhood Survey (SNS), Census 2011

Figure 4.2 shows the change in population over time, with spikes in the local area in 2002 and 2009.

Figure 4.2 Population Change over Time, 2003 = 1



Source: SNS, Census 2011

The area around Hillhead has a higher proportion of its population at working age (84%) than the Wider Area (78%) which in turn has a larger proportion than Glasgow as a whole (68%), Table 4.2.

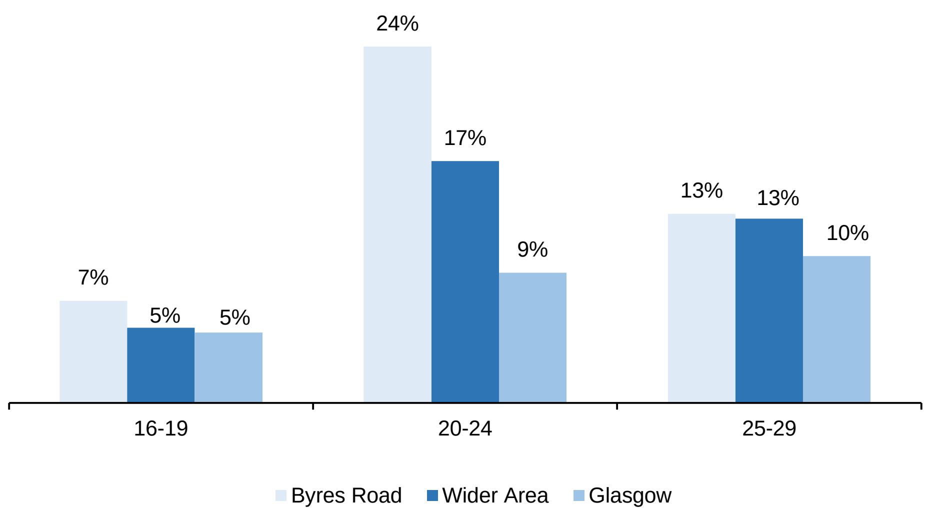
Table 4.2 Population by Age

		2001	2006	2011
Byres Road	Children	932 (9%)	1,028 (9%)	866 (8%)
	Working Age	8,142 (82%)	8,172 (81%)	8,838 (84%)
	Pensionable Age	859 (9%)	859 (9%)	821 (8%)
Wider Area	Children	6,897 (12%)	6,785 (12%)	6,507 (11%)
	Working Age	41,123 (74%)	41,843 (76%)	45,728 (78%)
	Pensionable Age	7,297 (13%)	6,727 (12%)	6,655 (11%)
Glasgow	Children	106,342 (18%)	97,334 (17%)	98,116 (16%)
	Working Age	381,723 (63%)	398,887 (67%)	422,142 (68%)
	Pensionable Age	90,645 (18%)	84,469 (17%)	78,572 (15%)

Source: SNS, Census 2011

This larger proportion of working age people is largely explained by the presence of high numbers of student attracted to the area surrounding Glasgow University as can be seen in Figure 4.3, with greater concentrations of young people, in particular those in the 20 – 24 age bracket, in Byres Road and the Wider Area.

Figure 4.3 Concentrations of Young People 2011



Source: SNS, Census 2011

Projections

Population projections are only available at the local authority level, and are therefore only presented for Glasgow. The population is predicted to increase by 11% by 2035, with a particularly large rise amongst those of pensionable age, Table 4.3.

Table 4.3 Population Projections

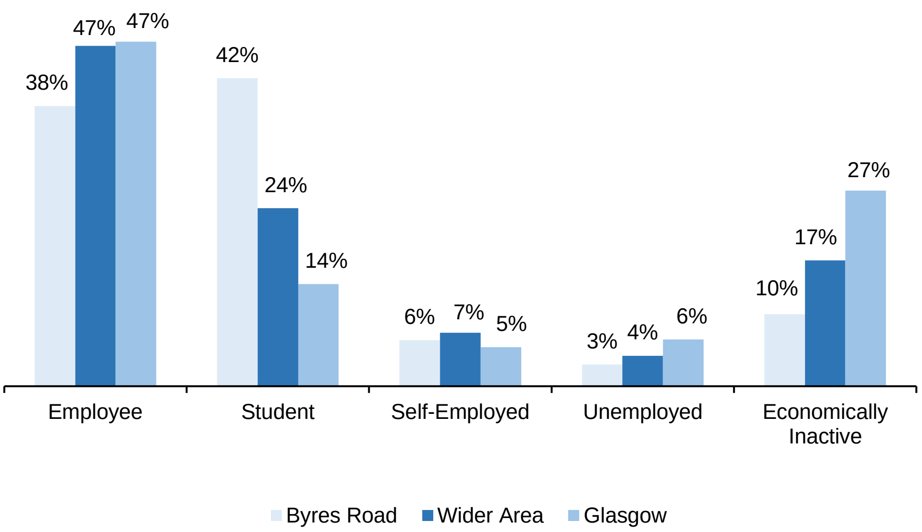
	2010	2015	2020	2025	2030	2035	Change	%
Children	97,236	101,793	108,019	108,206	103,736	98,729	1,493	2%
Working Age	414,721	426,784	431,893	435,422	438,215	442,840	28,119	7%
Pensionable Age	80,863	81,495	85,338	95,111	108,074	118,436	37,573	46%
Total	592,820	610,072	625,250	638,739	650,025	660,005	67,185	11%

Source: General Records Office Scotland (GROS)

4.3 Employment

Economic activity status differs around Byres Road to the city as a whole, with a much higher proportion of students and fewer economically inactive, Figure 4.4.

Figure 4.4 Economic Activity Ages 16 – 74, 2011



Source: Census 2011

Around three quarters of employment in the Byres Road area is taken up by the University of Glasgow and the Western Infirmary, however, disclosure issues with the dataset prevent us from presenting the exact numbers. Data provided by GCC shows that the hospital alone accounts for around 3,500 direct staff, but it is likely to have a major indirect, or off-site, employment impact through the spending patterns of patients and visitors. This will be a major issue to address as the hospital is scheduled for closure in 2015, although redevelopment of the site to accommodate additional Glasgow University functions will offset some of this lost activity.

The only other two industries with significant level of employment are retail and accommodation and food services, taking in employment in the shops, restaurants and bars of Byres Road, Table 4.5.

Table 4.5 Byres Road Employment

	2009	2010	2011	2012	Change	%
Agriculture, forestry & fishing	0	0	0	0	0	-73%
Mining, quarrying & utilities	0	0	0	0	0	-100%
Manufacturing	0	0	0	100	0	183%
Construction	0	0	100	0	0	75%
Motor trades	0	0	0	0	0	-50%
Wholesale	0	0	0	0	0	-87%
Retail	600	700	700	600	0	0%
Transport & storage (inc postal)	0	0	0	0	0	467%
Accommodation & food services	1,600	1,400	1,400	1,500	0	0%
Information & communication	100	100	100	100	0	-4%
Financial & insurance	100	200	100	100	0	10%
Property	100	0	100	100	0	62%
Professional, scientific & technical	500	400	400	400	0	-6%
Business administration & support services	100	100	100	200	100	98%
Public administration & defence	0	0	0	0	0	27%
Education	n/d	n/d	n/d	n/d	n/d	n/d
Health	n/d	n/d	n/d	n/d	n/d	n/d
Arts, entertainment, recreation & other services	400	500	400	500	100	20%
Total	14,300	13,700	13,500	13,900	-400	-3%

Source BRES

Table 4.5 presented workplace-based employment within the area, whilst Table 4.6, presents resident-based employment. There are many more people working in the area than live in the area. In particular, the large majority of those working at the hospital, the University and in accommodation and food services live elsewhere, whilst many working in 'Information & communication', 'Public administration & defence', 'Financial & insurance' and 'Professional, scientific & technical' live in the area but work elsewhere.

Table 4.5 Residence Based Employment

	2011
Agriculture, forestry & fishing	11
Mining, quarrying & utilities	18
Manufacturing	181
Construction	44
Motor trades	9
Wholesale	158
Retail	582
Transport & storage (inc postal)	120
Accommodation & food services	521
Information & communication	361
Financial & insurance	282
Property	78
Professional, scientific & technical	531
Business administration & support services	172
Public administration & defence	251
Education	834
Health	985
Arts, entertainment, recreation & other services	398
Total	**5,536**

Source: Census 2011

Comparing this data with population for Byres Road area of 10,525 in 2011 shows that 53% of all residents are in full or part-time employment. This compares with the Glasgow and Scottish averages of 52% and 60% respectively (source: 2011 Census), and reflects the large proportion of students living in the area.

The Wider Area is also characterised by large ‘Health’ and ‘Education’ sectors, although they only take up 52% of employment. ‘Retail’ and ‘Accommodation and food services’ are other large employers, whilst ‘Public administration and defence’ has added a large number of jobs in recent years, Table 4.6.

Table 4.6 Wider Area Employment

	2009	2010	2011	2012	Change	%
Agriculture, forestry & fishing	-	-	-	-	0	-60%
Mining, quarrying & utilities	-	-	-	-	0	21%
Manufacturing	600	500	500	500	-100	-23%
Construction	500	400	500	500	0	6%
Motor trades	800	900	700	800	-100	-8%
Wholesale	800	500	500	500	-300	-34%
Retail	2,700	2,700	2,800	2,500	-100	-5%
Transport & storage (inc postal)	400	400	300	300	-100	-27%
Accommodation & food services	3,500	3,000	2,800	2,900	-600	-18%
Information & communication	600	600	500	600	0	0%
Financial & insurance	300	400	300	300	0	-3%
Property	400	300	400	400	0	11%
Professional, scientific & technical	1,800	1,600	1,800	1,600	-200	-10%
Business administration & support services	1,900	1,900	2,000	1,600	-400	-19%
Public administration & defence	300	1,300	700	1,500	1,100	345%
Education	8,400	7,900	8,300	7,700	-600	-8%
Health	10,400	10,100	10,600	9,800	-600	-6%
Arts, entertainment, recreation & other services	1,500	1,600	1,500	1,800	300	20%
Total	35,000	34,500	34,300	33,400	-1,600	-5%

Source BRES

Glasgow has lost a considerable number of jobs since 2009, particularly in 'Professional, scientific and technical' industries, however, 'Construction' and 'Business administration & support services' have also seen big declines, Table 4.7.

Table 4.7 Glasgow Employment

	2009	2010	2011	2012	Change	%
Agriculture, forestry & fishing	0	100	0	0	0	-18%
Mining, quarrying & utilities	5,900	6,400	6,500	5,900	-100	-1%
Manufacturing	20,800	19,900	19,800	19,800	-1,000	-5%
Construction	19,800	17,100	17,300	15,600	-4,200	-21%
Motor trades	5,200	5,300	4,800	4,600	-600	-12%
Wholesale	11,500	10,000	9,800	9,600	-1,900	-17%
Retail	37,800	38,300	39,500	39,100	1,300	3%
Transport & storage (inc postal)	14,800	13,900	14,200	12,700	-2,100	-14%
Accommodation & food services	26,800	25,600	25,100	24,800	-2,000	-7%
Information & communication	13,900	13,500	12,900	13,900	0	0%
Financial & insurance	22,300	20,800	21,900	22,300	0	0%
Property	8,700	7,200	9,300	9,000	300	3%
Professional, scientific & technical	41,200	31,100	31,100	29,600	-11,600	-28%
Business administration & support services	53,400	47,500	48,100	50,100	-3,300	-6%
Public administration & defence	26,400	27,900	25,800	23,700	-2,700	-10%
Education	30,100	29,700	29,000	28,000	-2,100	-7%
Health	62,000	61,400	61,400	59,400	-2,600	-4%
Arts, entertainment, recreation & other services	17,500	17,600	17,800	17,100	-400	-2%
Total	418,200	393,200	394,200	385,200	-33,000	-8%

Source BRES

Using location quotient analysis we can see which industry an area is particularly reliant on, compared to the Scottish average. Any number above 1.2 indicates a high concentration, and below 0.8, a low concentration.

As already discussed, Byres Road is particularly reliant upon 'Education' due to the University, and also 'Health' and 'Accommodation and food services'.

Table 4.8 Location Quotient

	Byres Road	Wider Area	Glasgow
Agriculture, forestry & fishing	0.01	0.01	0.01
Mining, quarrying & utilities	0.00	0.21	0.55
Manufacturing	0.06	0.17	0.66
Construction	0.06	0.29	0.80
Motor trades	0.00	1.41	0.75
Wholesale	0.01	0.52	0.81
Retail	0.45	0.77	1.02
Transport & storage (inc postal)	0.03	0.20	0.82
Accommodation & food services	1.63	1.25	0.94
Information & communication	0.28	0.68	1.45
Financial & insurance	0.24	0.21	1.48
Property	0.54	1.00	1.78
Professional, scientific & technical	0.43	0.69	1.09
Business administration & support services	0.17	0.60	1.67
Public administration & defence	0.02	0.70	0.98
Education	5.86	2.99	0.94
Health	1.74	1.83	0.96
Arts, entertainment, recreation & other services	0.69	1.18	0.95

Source BRES

4.4 Unemployment

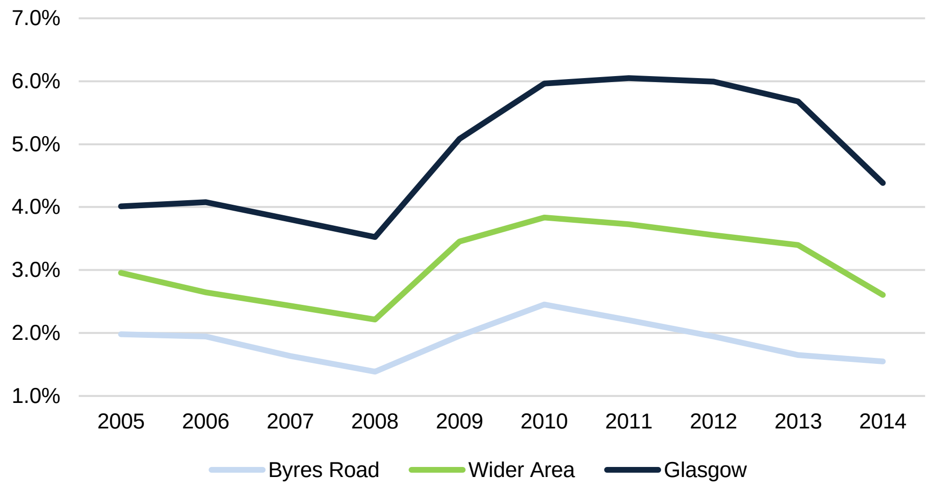
Claimant count unemployment has followed a similar pattern across all areas, with a decline to 2008 and then a spike and a more recent decline, however unemployment is lower in the Wider Area than in Glasgow, and lower still in Byres Road, Table 4.9 and Figure 4.5, over.

Table 4.9 Claimant Count

	2006	2008	2010	2012	2014
Byres Road	156 (1.9%)	78 (1%)	206 (2.5%)	172 (1.9%)	137 (1.6%)
Wider Area	1,107 (2.6%)	947 (2.2%)	1,708 (3.8%)	1,626 (3.6%)	1,191 (2.6%)
Glasgow	16,263 (4.1%)	14,290 (3.5%)	24,762 (6%)	25,311 (6%)	18,509 (4.4%)

Source: Claimant Count

Figure 4.5 Claimant Count Rate

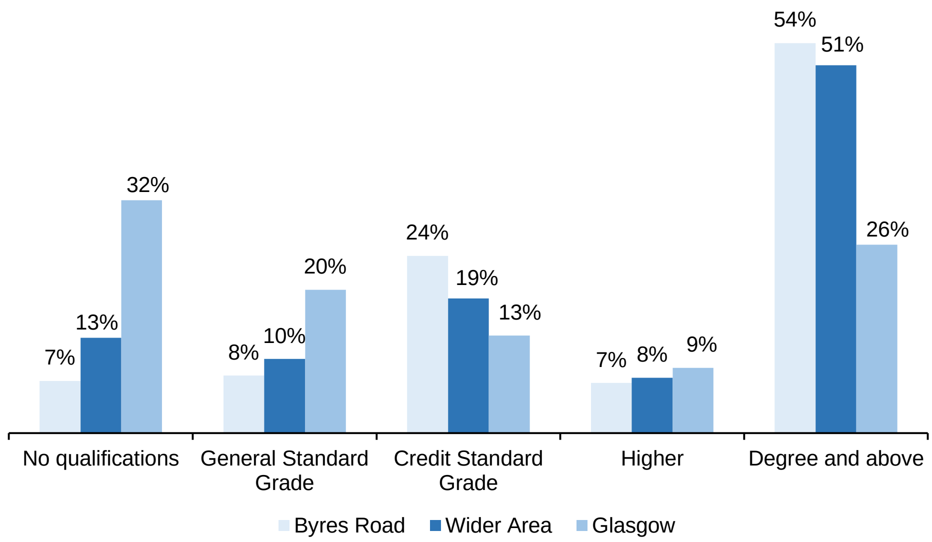


Source: Claimant Count

4.5 Skills

Figure 4.6, over, outlines the highest level of educational attainment in each of the three study areas. Both the Byres Road and Wider Areas have much higher rates of educational attainment than Glasgow as a whole.

Figure 4.6 Highest Level of Educational Attainment

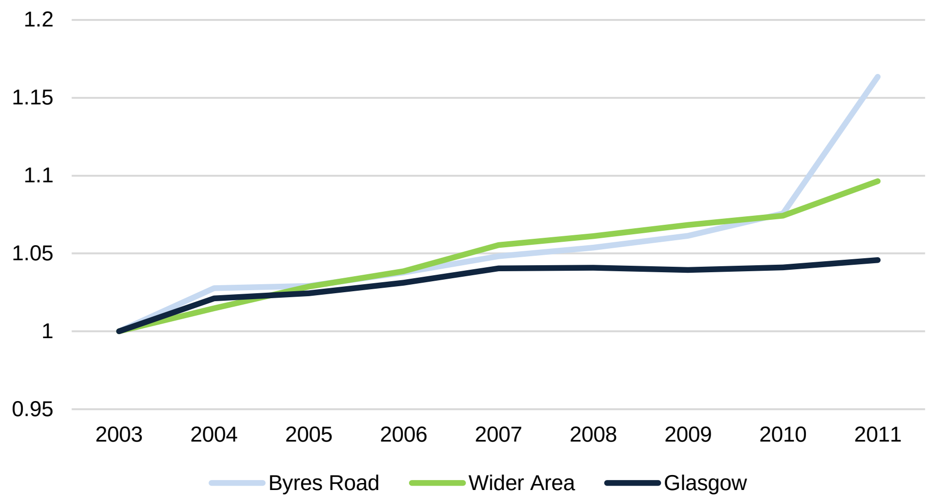


Source: Census 2011

4.6 Housing

The number of houses has increased across all areas, with Byres Road and the Wider Area having stronger growth than Glasgow, and Byres Road having a particularly large jump from 2010 due to housing development at the bottom end of Byres Road, Figure 4.7.

Figure 4.7 Number of Houses, 2003 = 1



Source: SNS

Housing is almost entirely made up of flats in the Byres Road area, with both the Wider Area and Glasgow as a whole, also mostly made up of flats, Table 4.10.

Table 4.10 Housing Type

	Flats	Terraced	Semi-detached	Detached	Unknown
Byres Road	96.1%	3.0%	0.4%	0.4%	0.1%
Wider Area	88.6%	7.6%	2.6%	0.8%	0.3%
Glasgow	73.4%	11.7%	11.0%	3.4%	0.5%

Source: SNS

House sizes are, on average, larger in both Byres Road and the Wider Area, but there is also a larger percentage of 1 and 2 bedroom houses, a much smaller proportion of 3 and 4 bedroom houses, Table 4.11.

Table 4.11 House Size

	1 - 2 room	3 - 4 room	5 - 6 room	7 rooms+	Mean	Median
Byres Road	19%	54%	19%	8%	3.8	4
Wider Area	19%	58%	16%	7%	3.7	3
Glasgow	16%	66%	12%	5%	3.5	3

Source: SNS

The Byres Road area has a high concentration of households in multiple occupation, occupied entirely by students (student HMOs) as reported in Table 4.12. There is a particularly high concentration (38.9%) in the block of housing between Byres Road and Hillhead Street and Great George Street and Great Western Road.

The Wider Area also has high levels of student HMOs, particularly due to the high levels in Hillhead (16.2%), but both Partick (9.6%) and Kelvinside (6%) have relatively high concentrations compared to the Glasgow average (2.8%).

The numbers of student HMOs have increased significantly since 2001, roughly doubling across all areas, although data is unavailable at the Byres Road level for 2001, Table 4.12, over.

Table 4.12 Percentage of Households in Multiple Occupation: All FT Students

	2001	2011
Byres Road	-	15.8%
Wider Area	5.7%	9.9%
Glasgow	1.2%	2.8%

Source: 2001 & 2011 Census

Byres Road and the Wider Area has become increasingly dominated by the private rental sector in recent years, with both private ownership and social housing on the decline. The same trend is present in Glasgow as a whole but to a much lesser extent, Table 4.13.

Table 4.13 Tenure

	Year	Owned	Social Housing	Private Rent
Byres Road	2001	58%	9%	32%
	2011	48%	8%	43%
Wider Area	2001	54%	21%	14%
	2011	45%	18%	35%
Glasgow	2001	52%	37%	11%
	2011	49%	34%	17%

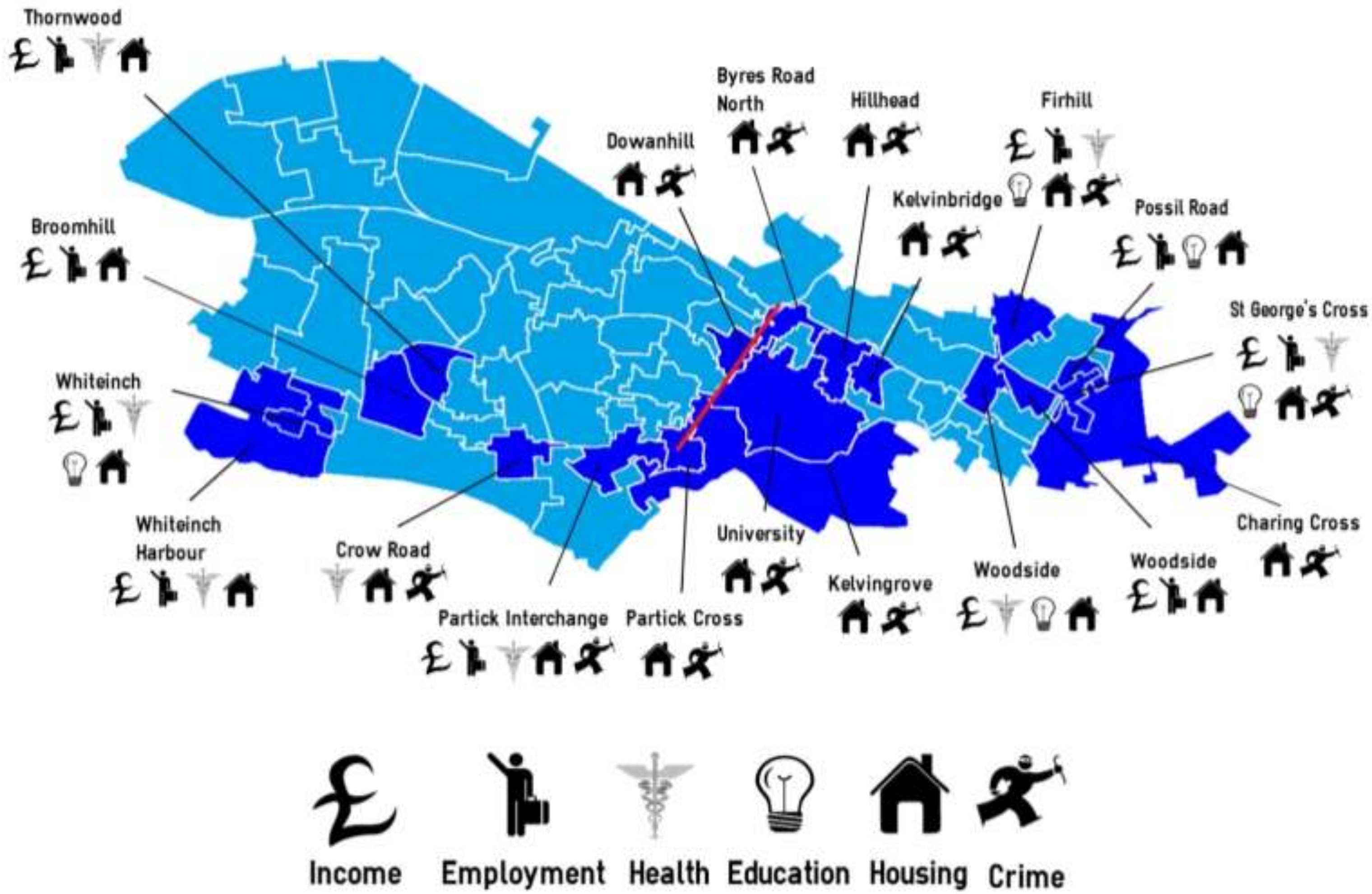
Source: 2001 & 2011 Census

4.7 SIMD

Figure 4.8, over, outlines the areas of the wider West End with multiple forms of deprivation. A datazone is characterised as deprived when it is in the bottom 15% of datazones for that particular form of deprivation in Scotland. There are pockets of income, employment, health and education deprivation to the west around Whiteinch and towards the city centre, however, the major forms of deprivation in and around Byres Road are housing and crime.

In fact, 68% of datazones in the wider West End area fall within the bottom 15% of Scottish datazones for housing deprivation, indicating that there are significant problems with overcrowding and lack of basic facilities, in particular central heating.

Figure 4.8: SIMD Characteristics of the West End of Glasgow, 2012



The darker blue shading picks out specific areas of the West End where there are higher instances of SIMD deprivation.

5. Assets Base and Future Development

Beyond its retail and food & drink offering, the Byres Road area has a number of high quality assets that attract footfall to the area.

5.1 Amenity and Visitor Assets

The **Botanic Gardens** and **Kelvingrove Park** provide high quality green spaces within the urban west end and attract visitors from across the city. Each park boasts a number of amenities. For Kelvingrove Park these include:

- the recently completed Kelvingrove Bandstand which is planned to be regularly used for live music and other performances;
- five bowling greens, recently upgraded for the Commonwealth Games;
- four synthetic surface tennis courts, again, recently upgraded;
- croquet green;
- two football pitches on opposite sides of the park, one ash and one synthetic grass;
- skateboard park;
- two children's play areas;
- duck pond and other wildlife areas by the river;
- picnic benches with built in barbecue spaces;
- various statues and monuments, including the Stewart Memorial Fountain; and
- numerous open spaces for general use or for events.

Facilities at the Botanic Gardens are:

- the Kibble Palace and Hopkirk building main range of heated glasshouses containing a wide range of plant collections;
- a range of outdoor plant and tree collections and associated signage;
- ruins of disused train station and associated signage;

- children’s play area;
- food and drink stall;
- café/ bar;
- herb, vegetable and children’s gardens; and
- numerous open spaces for general use.

Kelvingrove Park and the Botanic Gardens are connected by a riverside walkway which also has a number of facilities and landmarks, including:

- children’s play area;
- riverside bar/ restaurant;
- cycle path;
- ruins of the old flint mill; and
- outdoor gym.

Mansfield Park provides an additional green space near the bottom end of Byres Road, however it is very small compared to the other parks and has limited facilities, although it does have a basketball court/football pitch.

Kelvingrove Art Gallery and Museum sits within the grounds of the Kelvingrove Park and attracts c. 1.5 million visitors a year, the most popular visitor attraction in the city.

Across Dumbarton Road from the museum lies the **Kelvin Hall**, a combined sports and cultural events space. It is currently undergoing significant redevelopment and is scheduled to reopen in 2016, however details as to its final use are unclear at the time of writing.

The **Hillhead Library**, located on Byres Road, provides library services for the local community as well as IT services and meeting/community room for hire.

The Grosvenor Cinema in Ashton Lane is one of only two small cinemas left operating in Glasgow, along with the Glasgow Film Theatre in the city centre. It has two screens generally showing one new release in each along with special screenings and events from time to time.

West End Festival and Mela, hosted annually across the whole month of June, is Glasgow's largest cultural event, and will celebrates its 20th anniversary in 2015. The centre-piece is the carnival parade, the largest after Notting Hill, London, with its parade-day programmed to run alongside the Glasgow Mela, attracting around 100,000 people into the area.

Oran Mor – large arts and entertainment venue staging theatre and live music performances every night of the week. The venue has lounge bar, two restaurants, private dining room, live music venue, night club, and large auditorium. It is famous for its artwork by Alasdair Gray, and also for hosting the ground-breaking, and now nationally recognised, 'A Play, A Pie and A Pint' lunchtime theatre performances.

5.2 Accessibility

Byres Road is highly accessible from most of the city using a range of transport modes, creating perceptions of safety along busy routes.

It is particular accessibly from those areas served by an underground station i.e. City Centre and Ibrox/Govan, as Byres Road has two underground stations at Hillhead and Kelvinhall. The subway is a major access point, and the location of the Hillhead station near the centre of Byres Road brings people directly into the heart of the area's retail, food & drink and service offering.

The subway operates from 6am till 11pm Monday to Saturday and 10am to 6pm Sunday. It carries around 12.5m passenger journeys per annum, and Hillhead is one of the busiest of the 15 stations, accounting for 15% of all traffic on the system.

Trains from Partick and Exhibition Centre make Byres Road accessible to a wider area, with direct trains linking as far as Edinburgh in the east and Helensburgh in the west.

By road, Byres Road is well linked to both the west and east by the M8, with just a short journey after exiting at Charing Cross. The recent completion of the M74 has made it much easier for those in the south east of the city to access Byres Road. There are however, difficulties with parking in the area which can limit the amount of visitors by car.

There are also a number of buses that pass Byres Road:

- 4 and 4A from Knightswood to Newton Mairns via City Centre and Cathcart (every 10 minutes);
- 6 and 6A from Clydebank to East Kilbride via City Centre and Cathcart (every 5 minutes);
- 19 from Summerston to Easterhouse via City Centre (every 30 minutes);
- 90 linking to much of the south side of the city (every 30 minutes); and
- 8 from Carmyle to Partick (every 30 minutes).

The area is also very accessible on foot and by cycle, and the new Glasgow Nextbike cycle hire scheme has six locations close to Byres Road, linking the area with 25 other sites across Glasgow, primarily in the city centre and West End.

5.3 Educational and Hospital Services

There are a number of schools within a one mile radius of Byres Road as outlined in Table 5.1.

Table 5.1 Schools

Name	Type	Current Roll	Distance from Byres Road	Annual fees
Hillhead Primary School	Non-denominational	604	0.6 miles	-
Hillhead High School	Non-denominational	891	0.5 miles	-
Notre Dame Primary School	Catholic	339	0.3 miles	-
Notre Dame Secondary School	All Girl Catholic	725	0.4 miles	-
Kelvinside Academy	Non-denominational private	596	0.8 miles	£6,750 - £10,830
The Glasgow Academy	Non-denominational private	1,354	0.8 miles	£8,130 - £10,770

The University of Glasgow lies across the river from the Kelvingrove Art Gallery and Museum, with the campus occupying much of the area to the east of Byres Road. The university's 6,000 staff and 23,000 students add considerable footfall to the area.

Adjacent to the south-west of the university is the **Western Infirmary**, a teaching hospital heavily affiliated with the university. It offers a range of health care services, most notably an accident and emergency service. However, with the hospital due to close in 2015, there will be a significant reduction in footfall as its 3,500 staff move to the new southern hospital site. The loss of staff, together with patients and visitors, could have a major impact on local business trade, particularly at the bottom end of Byres Road and along Dumbarton Road.

5.4 Future Developments

The Western Infirmary site has been acquired by Glasgow University for future expansion. The University launched its **Gilmorehill Campus Development Framework**[17] in June 2014 for its current estate together with the Western Infirmary site, extending to 74 acres/30 hectares. The vision incorporates new and refurbished buildings along with open spaces and supporting infrastructure to create a modern campus. The Framework will *"inform and guide development proposals as they come forward around a holistic and unified set of urban design principles placed in the broader context of the immediate neighbourhood and wider city setting"*.

There are a number of other potential sites for future development, the most prominent being the Church Street triangle site, Ashton Road and Lilybank Gardens car park sites, and Ruthven Lane redevelopment.

Church Street is a former school site built in 1904 and classified as a Category C listed building – the three storey school remains in use as a Social Work facility, but the former swimming pool and janitors house to the south of the site are vacant and listed as being in 'very poor condition'[18].

The site is owned by Glasgow City Council and lies adjacent to the Western Infirmary site – there may therefore be potential in pursuing discussion with the University to incorporate this site into its Campus Development Framework. Alternatively this is a large and prominent site with frontage onto Byres Road, which could be suitable for development as employment or residential use, both of which would create new footfall and offset, to an extent, the impact of hospital closure. Any

17 Gilmorehill Campus Development Framework for Glasgow University, PAGE\PARK, June 2014
18 Buildings at Risk Register for Scotland, 35 Church Street, Partick, Ref 2706

redevelopment of the site would need to take account of its Category C listed building status.

The **Ashton Road and Lilybank Gardens** car park sites (25 and 106 spaces respectively) could potentially be redeveloped, but removing 131 off-street parking spaces is likely to cause concern amongst local businesses, exacerbating the parking issues identified at Section 3.7.

There is long standing planning permission for a major redevelopment of **Ruthven Lane and Dowanside Lane**, however this permission expired on 6th April 2014. An extension to renew this planning permission (together with Conservation Area Consent) was applied for on 21st March, with a decision yet to be made.

The proposed development covers the demolition of all buildings except the restaurants and small office buildings and replace them with a single two storey building for mixed use with 1,235 sqm retail, 706 sqm office and 600 sqm restaurant space.

6. Conclusions and Recommendations

In bringing together the analysis presented in earlier chapters, we have outlined a series of conclusions and recommendations for consideration by BRTA and GCC. There are a large number of potential opportunities, issues and constraints and the following points should be read as options that could inform future development and regeneration of the Byres Road area.

Byres Road at a turning point – it has lost out due to the combined pressure from the emerging and vibrant evening economies at Finnieston and Gibson Street, alongside an uplift in quality/niche retailers focused on other West End locations (Hyndland). The relocation of BBC Scotland and forthcoming closure of the Western Infirmary also removes a significant daytime employee footfall. Byres Road is therefore losing some of its evening trade, and is competing in the difficult middle-market retail sector – neither price nor quality driven. There is an opportunity to focus on enhancing the food and drink offer to draw back some of the lost custom and retain competitiveness in the future, and also to attract more small independent traders to retain its quirky status – this may require a more detailed review of the current property costs (rent and rates) which are high in comparison with other locations.

In general there is too much retail floorspace in town centres, with high vacancy rates across the country in all but the most successful locations. One solution adopted by many towns is an increase in service activity – bars/restaurants/cafés, hairdressers/beauty, etc i.e. those services and activities that cannot be purchased online. There is a need to reconsider the 80/20 Class 1 retail split for the Primary Retail Area and, potentially, remove it altogether outwith this primary area. Coffee shops are increasingly being used as business space for new and small enterprises and could therefore be regarded as supporting economic development infrastructure. There is also a growing trend toward combined spaces – coffee shops and some form of retail (gifts, records, books, flowers, etc) e.g. Felix & Oscar at Great Western Road (gifts, cooking, clothes) and Little Botanica at Pollokshaws Road (flowers/gifts).

Many towns are focusing on delivering more, and an increasingly wide range of, events, activities and markets to drive footfall within the town centre. As outlined at Chapter 4, the West End Festival and Mela is already the largest cultural event in Glasgow's calendar and runs over the whole month of June. There is an opportunity for BRTA (and the BID, if successful) to deliver an extended programme. This could include local markets e.g. Afternoon Twee hosted its first pop-up shop in Ashton Lane (the Lane Bar) over June 2014 to coincide with the West End Festival.

There is a need to enhance the physical fabric of some units and make them more adaptable for a range of functions and uses. There may be potential therefore to establish a property upgrade scheme to ensure that units, particularly those that have been vacant for some time are fit for modern business needs. The shop front format should, however, be retained even where new uses are introduced as this will maintain the traditional town centre context.

As well as enhancing property, there is a need to ensure the place environment is attractive, clean and safe – walking, cycling, parking, etc. As covered at Section 1.3 'Place Marketing Strategy and Action Plan' GC is developing proposals to improve the built environment, public realm and access with potential interventions including reducing traffic, widening pavements, creating civic spaces, enhanced signage, waste storage, etc. Creating a more attractive environment will not, of itself, increase footfall but is an important element (almost a necessity) in creating an attractive and successful town centre. Improving the place environment of Byres Road was identified as a high priority in the shopper survey – Table 3.4 identifies the top factor that would encourage more visits as 'better environment: seats, pavements, greenery, etc' and 'less traffic' the third factor. Conversely these were identified as the top two factors that discourage more visits during the day.

BRTA (and the BID, if successful) should work with retailers to encourage later shop opening hours to catch the significant volume of commuters that pass through Byres Road on their way home from work. Retailers have largely maintained traditional shop opening hours – 9am to 6pm – and fail to catch the after-work customer. The introduction of the Tesco Metro store (which opens 6am to midnight) creates an opportunity to work with retailers in this immediate area as a first step, but a flexible approach could be adopted with others that ties later opening hours to an extended activity and events programme.

There is an opportunity to encourage 'meantime uses' for empty shop units on an ad hoc basis – this would need the support of property owners but could be established as a pilot initiative with City Property owned units. This would allow the introduction of a wide range of other uses e.g. performance space (music, theatre, dance, art), pop-up shops, craft emporium, etc. This approach has been adopted by the owner of the Shawlands Shopping Centre where vacant units have been taken over by the

Art Village and vacated as and when there is demand from a permanent occupier. It has created new footfall and interest in the Shopping Centre and brought in customers that might not otherwise have visited Shawlands. This approach has also been adopted by the Huntly Development Trust where Deveron Arts (local arts organisation) has taken temporary space in vacant units for performances, exhibitions and other cultural activities.

Extending the permanence of meantime uses, there may be an opportunity to target quirky independent and niche retailers (with which Byres Road is synonymous) through a consortium outlet. Small and start-up businesses could rent a portion of a unit (even a single shelf) to test Byres Road as a potential outlet. This would create an emporium style outlet, most likely (but not necessarily exclusively) focused on crafts/art/gifts. This could be developed alongside small business support outlets – Business Gateway, PSYBT, etc.

At present there are four supermarket outlets operating on Byres Road – Waitrose as a large 2,000 sqm store, and Iceland, Tesco Metro and Marks & Spencer as smaller 1,000 sqm stores – all three located at the top end of the road. Consideration should be given to the capacity for another small supermarket at the central/bottom end of Byres Road to serve the large resident base in this area and extend the range of retail. We understand that Sainsbury purchased the Farmfoods unit at 22 Byres Road (1,000 sqm), and while it has secured planning consent it has not yet taken over operation. While Farmfoods will provide a service to customers, it will have limited appeal and has limited opening hours – 8.30 am till 6/8 pm.

In line with the recommendation in the Town Centre Action Plan and the approach adopted by other local authorities across Scotland, GCC should adopt the Town Centres First principle for all of its relevant services and activities. GCC should also work with other public sector organisations to maintain delivery of key services within an accessible town centre location, which will also help to maximise footfall for adjacent businesses.

Our analysis of vacant units shows that Byres Road's vacancy rate has levelled off at c. 8%, considerably lower than Scottish and UK averages. We have identified a number of options above that could establish new uses (permanent or meantime) for vacant units, but there is a need to focus efforts on persistently vacant units i.e. vacant for over 12 months. There is a need to understand the reason(s) why these units are not attractive to the market – this could include price, location, physical, quality, size, etc – and to develop an appropriate response.

Of the four potential development opportunity sites, one has a formal redevelopment proposal (albeit stalled) and two are operational car parks that generate income and provide an essential service. The remaining site at Church St / Torness St does, however, present an opportunity to attract a broader range of uses – potential demand for residential and/or business space – and also create an active frontage onto Byres Road. GCC should therefore establish a Development Opportunity Vision for the Church Street site to attract market interest – this would obviously need to be done in consideration of the current Social Work use in the former school building and also the Category C listed building status. Any development of this site could link with the adjacent University Campus Development Framework and could be used to open links (visual and physical) through foot/cycle/walk path to Kelvinhall, Kelvingrove Museum and Kelvingrove Park.

In a broader context, but outwith the immediate Byres Road area, there is a need to understand and monitor the development proposal for the former BBC Scotland site at Hamilton Drive. The site is currently being redeveloped as Headquarter building for the G1 Group, with further proposals for residential accommodation. It is important that this site complements the offer at, and does not create additional competition through uses that would draw footfall away from, Byres Road.