

To: Economy and Regeneration Policy Board

On: 24 January 2023

Report by: Chief Executive

Heading: Renfrewshire Economic Profile Update (January 2023)

1. Summary

1.1 This report contains the eighth edition of the Renfrewshire Economic Profile. These Economic Profile updates allow members to track changes in the local economy through a set of key statistical indicators. The last update on the Economic Profile was brought to Board in December 2021.

2. Recommendations

- 2.1 It is recommended that the Board:
 - (i) notes the content of the January 2023 Renfrewshire Economic Profile Update.

3. Background

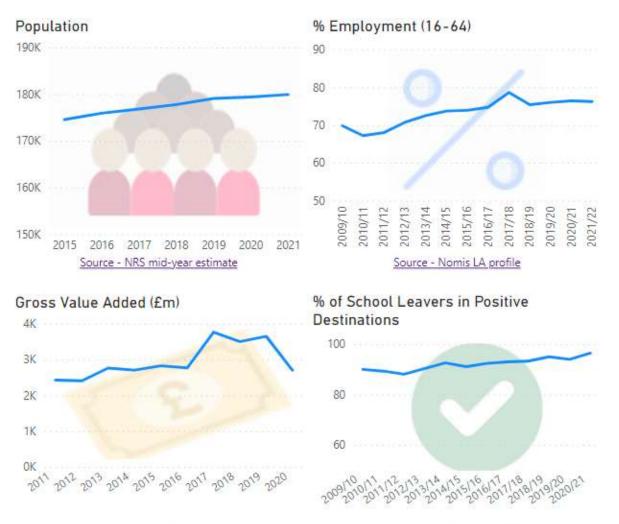
- 3.1 The purpose of the economic profile update is to describe and track local demographics and economic indicators for Renfrewshire on an annual basis. The data and analysis presented provides a context and a baseline to assess how well the Renfrewshire economy over time.
- 3.2 In terms of the profile, as with previous versions of this report, officers have selected Scotland and Glasgow City Region (GCR) as the most appropriate comparators. The national average is a commonly used guide by most local authorities in terms of relative performance.
- 3.3 Members comments are welcomed on the format and content of the economic profile. The profile will be shared with stakeholders and become the key source of data relating to the performance of the local economy. The profile aligns with the Renfrewshire Economic Strategy.

4. Key issues arising from the Renfrewshire Economic Profile

4.1 In previous version of these economic profile updates to Board, officers had selected a range of the latest statistics against Renfrewshire Council Plan and Community Plan strategic objectives to allow members to see progress against some of the Council's key priorities.

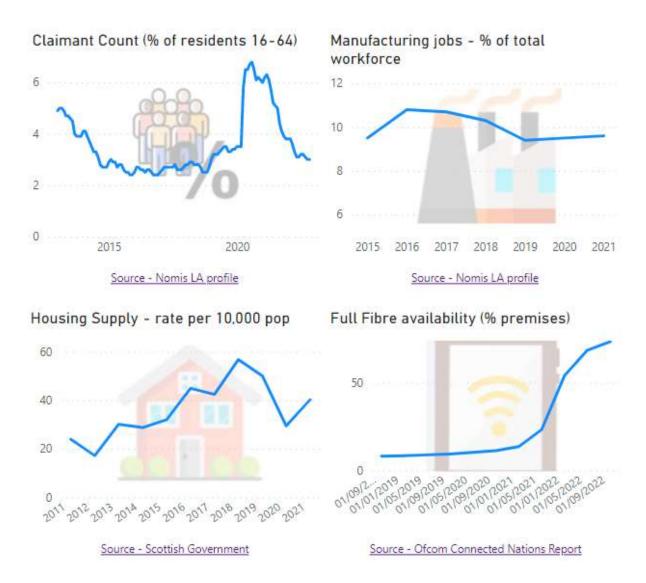
Economic indicators dashboard

4.2 Officers have selected a number of key statistics and have displayed them in the Dashboard below:



Source - Scottish Government

Source - Scottish Annual Business Statistics



- 4.3 These indicators show that Renfrewshire's population is growing, and employment levels have increased in 2022. Female employment in particular has seen a significant increase in Renfrewshire (8.9%); far higher than the national average and the highest in the GCR. The Gender Employment Gap in 2021 also changed so that on average a higher proportion of women were in employment in comparison to men in Renfrewshire.
- 4.4 Unemployment rates have fallen between 2021 and 2022 and Renfrewshire's claimant count has also continued to fall over the same period. This highlights that more people have attained employment coming out of the pandemic.
- 4.5 Following the CityFibre / Commsworld fibre roll out, the % of households with access to full fibre connections has further increased from 8% in September 2018 to over 73% in November 2022.
- 4.6 The rate of school leavers in positive destinations of 96.5% in 2019/20 is higher than the national level and is the 3rd highest in the City Region.
- 4.7 Following the covid pandemic, Town Centre Vacancy Rates have increased and is more pronounced in Renfrewshire's largest towns.

- 4.8 There was a significant increase (£40m) in direct tourism expenditure in 2021 -£88m compared to 48m in 2020. The significant difference is likely attributed to restrictions related to the pandemic which were in place during 2020 and resultant capacity issues for the whole year.
- 4.9 The supply of new housing per 10,000 population increased between 2020 and 2021. Renfrewshire's rate is still the 3rd highest in the City Region and is higher than the national average.
- 4.10 The rate of manufacturing jobs as a % of the total workforce has remained stable between 2019 and 2021 but has declined by 11% from the 2017 figure. Renfrewshire has the highest proportion of employment in manufacturing (9.5%) in the City Region.
- 4.11 GVA in Renfrewshire fell between 2019 and 2020 by 23% highlighting the impacts of the pandemic on the local economy. This is broadly in line with the Scottish national average (19% decrease). Renfrewshire still generates the 4th highest amount of GVA amongst the GCR authorities.

<u>Conclusion</u>

- 4.12 Overall Renfrewshire's economy appears to be performing well when compared to regional and national rates for a number of key performance indicators including employment, unemployment, qualifications and earnings.
- 4.13 Of particular note is the significant increase in female employment in Renfrewshire both higher than the national average and City Region.
- 4.14 Manufacturing, Retail and Transport and Storage continue to be important sectors for Renfrewshire in terms of jobs and GVA generated.
- 4.15 The full economic profile for Renfrewshire is included at Appendix 1 to this report.

Implications of the Report

- 1. **Financial** No additional finance is sought. All funding is accounted for within existing Council budgets.
- 2. HR & Organisational Development None.
- 3. Community/Council Planning
 - Empowering our Communities the new Economic Profile will enable communities to have a clearer understanding of the relative performance of the Renfrewshire economy.
 - Jobs and the Economy the new Economic Profile will present a clearer picture of the relative performance of the Renfrewshire economy.

- 4. Legal None.
- 5. **Property/Assets** None.
- 6. Information Technology None.

7. Equality & Human Rights

- (a) The Recommendations contained within this report have been assessed in relation to their impact on equalities and human rights. No negative impacts on equality groups or potential for infringement of individuals' human rights have been identified arising from the recommendations contained in the report.
- 8. Health & Safety None.
- 9. Procurement None.
- 10. Risk None.
- 11. Privacy Impact None.
- 12. COSLA Policy Position Not Applicable.
- 13. Climate Risk Not Applicable.

List of Background Papers None.

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Renfrewshire Economic Statistics (Eighth Edition: January 2023)

1. Population

	Renfrewshire	Scotland	Glasgow City Region
	179,940	5,479,900	1,849,070
	Increase of 4% on 2010	Increase of 4% on 2010	Increase of 4% on 2010
Population 2021			
↑ 1	185,360	5,574,819	1,885,826
	3.0% increase on 2021	1.7% increase on 2021	2.0% increase on 2021
Population projection (at 2043,			
2018 based)			
	1,647	47,786	17,043
Births	This is a decrease of 17% from 1,995 births	This is a decrease of 19% from 58,791 births	This is a decrease of 17% from 58,791 births in
DITUIS	in 2010	in 2010	2010
Births (2021)			
Birth Rate per 1,000	9.5	8.7	In 2021, Renfrewshire
Population (2021)	In Renfrewshire, the standardised birth rate increased from 8.9 per 1,000 population in 2020 to 9.5 in 2021	The rate in Scotland overall increased from 8.6 to 8.7 between 2020 and 2021.	was the council area with the 5th highest standardised birth rate in Scotland. Between 2020 and 2021.
	2,232	63,587	21,704
Deaths	This is an increase of 17% from 1,910 deaths in 2010	This is an increase of 18% from 53,967 deaths in 2010	This is an increase of 16% from 18,791 deaths in 2010
Deaths (2021)			

	Renfrewshire	Scotland	Glasgow City Region
Male Male Life Expectancy 2019-21	75.5	76.6	Male life expectancy at birth has increased more rapidly than female life expectancy at birth between 2001-03 and 2019-21.
P Female	80.0	80.8	
Female Life			
Expectancy 2019-21			
Net Migration (2020-21)	1230 Renfrewshire had the 2nd highest level of net migration in the GCR, with an increase of 380 from 850 people in 2019-20.	27,800 This is an increase of 10,900 people from 16,900 in 2019/20.	6,500 This is a decrease of 250 people from 6,750 in 2019/20.
% of population that is of the working age (16- 64yrs) (at 2021)	64%	64%	65%

2. Employment

	Renfrewshire	Scotland	Glasgow City Region
Employment rate - aged 16-64 (Jul 2021-Jun 2022)	77.4% The rate has increased by 3.9% compared to the previous 2021 figure.	74.4% The rate has increased by 2.2% in comparison to the previous 2021 figure.	Renfrewshire has the 2nd highest employment rate in the GCR. South Lanarkshire has the highest (78.2%) and North Lanarkshire has the lowest (68.1%).
Male Employment rate - Male (Jul 2021-Jun 2022)	72.5% The male employment rate has marginally fallen by 1.2% compared to the previous 2021 figure.	77% The national employment rate for males is significantly higher than the Renfrewshire rate.	Renfrewshire has the second lowest male employment rate in the GCR. South Lanarkshire has the highest (84.8%) and North Lanarkshire has the lowest (67%).
Female Employment rate - Female 16-64 (Jul 2021-Jun 2022)	82.3% The female employment rate has increased significantly by 8.9% compared to the previous 2021 figure.	72% The national employment rate for females is significantly lower than the Renfrewshire rate.	Renfrewshire has the highest female employment rate in the GCR, with Glasgow City having the lowest (66.2%)
Unemployment Rate 16-64 (Jul 2021-Jun 2022)	2.7% Renfrewshire's unemployment rate has fallen by 3.4% from the previous 2021 figure.	3.5% 1.3% decrease in comparison to the overall 2021 figure	Renfrewshire has the 5th highest unemployment rate in the GRC. North Lanarkshire has the lowest (1.8%) and East Renfrewshire the highest (3.7%)
Claimant Count (Nov 2022)	3,490 Encouragingly the claimant count in Renfrewshire has decreased by 23% compared to the November 2021 figure	109,585 The national claimant count figure has decreased by 23% since November last year	45,370 When compared to the November 2021 figure, the GCR claimant count has decreased by 22%

	Renfrewshire	Scotland	Glasgow City Region
Claimants as a proportion of	3.0%	3.1%	3.3%
residents aged 16-64 (September 2021)	This proportion has decreased from 3.9% back in November 2021	This proportion has decreased from 4.1% back in November 2021.	Renfrewshire has the 6th highest proportion in the GCR. Glasgow City has the highest proportion (4.8%) whereas East Renfrewshire has the lowest (1.7%)
Occupations (Workplaces in Renfrewshire; at 2021)	 Renfrewshire has above average employment in: Manufacturing (8,000) Business administration (10,000) Retail (10,000) Transport and Storage (6,000) 	Scotland is closer to Renfrewshire in terms of the proportion for health and construction employment but is lower in the other sectors such as Manufacturing and business administration	Renfrewshire has much higher proportions of employment than the GCR in: • Manufacturing • Transportation and Storage; and • Business administration
Earnings (at 2022)	Median weekly earnings for full-time employees living in Renfrewshire are £634.80 Median weekly earnings for full-time employees working in Renfrewshire are £612.80	Median weekly earnings for full-time employees living in Scotland are £640.30 Median weekly earnings for full-time employees working in Scotland are £640.50	Renfrewshire has the 5th highest resident earnings in the GCR with East Renfrewshire the highest (£804.90) and West Dunbartonshire the lowest (£616.00). Renfrewshire has the 5 th highest workplace earnings in the GCR with Glasgow the highest (£670.80) and East Dunbartonshire the lowest (£582.10).
Employment in low pay sectors (%) 2020	35.1% 0.7% decrease from 2017	28.7% 1.1% decrease from 2017	30.8% Renfrewshire has the highest rate in the GCR. North Lanarkshire has
			the lowest rate at 25.5%.

	Renfrewshire	Scotland	Glasgow City Region
Gender Employment	-6.0%	5.0%	6.2%
Gap (full-time, %	11 10/ change from	2.7% decrease from	Renfrewshire has the 2 nd
points) 2021	-11.1% change from 2018, which highlights that a higher proportion of woman were in employment in 2021 in comparison to men	2018	lowest gap in the GCR. Glasgow City has the largest gap at 13.9%. Inverclyde has the lowest rate at -8.0%.
	50.4%	50.1%	Renfrewshire has the 4th
	9.9% increase from 2018	5.9% increase from 2018	highest rate of qualification at this level in the GCR with East Renfrewshire the highest (63.6%) and West Dunbartonshire the
Qualifications NVQ4 and above % of pop 16-64yrs (2021)			lowest (36.2%).
No Qualifications %	7.1%	7.7%	10.7%
of pop 16-64yrs (2021))	3.1% decrease from 2018	2.0% decrease from 2018	Renfrewshire has the 2 nd lowest level of residents with no qualifications in the GCR. North Lanarkshire has the highest % at 18.6%, whilst East Renfrewshire has the lowest at 4.4%
% of School Leavers	96.5%	95.5%	93.6%
in Positive Destinations 2020/21	3.2% increase from 2017/18	0.9% increase from 2017/18	Renfrewshire has the 3rd highest attainment level in the GCR . East Dunbartonshire has the highest % at 98.6%, with

	Renfrewshire	Scotland	Glasgow City Region
			West Dunbartonshire the lowest 91.0%.
% of Households	16.5%	21.5%	24.8%
that are Workless 2020	0.4% increase from 2017	3.4% increase from 2017	Renfrewshire has the 2 nd lowest % of households that are workless in the GCR . Glasgow City has the highest % at 22.5%, with East Dunbartonshire the lowest at 15.8%.
Travel to Work Survey SHS (2016)	Image: Second system 3.1% Image: Second system 73.0% Image: Second system 2.1% Image: Second system 19.5% Bus / Rail 19.5%	I2.3% Image: Constraint of the second sec	Renfrewshire has the 4th highest % driving to work in the GCR with Glasgow City the lowest (55.1%) and North Lanarkshire the highest (79.9%). Renfrewshire has the 4th lowest % taking bus/rail services to work in the GCR with Glasgow City the highest (28%) and North Lanarkshire the lowest (12.7%).

3. Business

	Renfrewshire	Scotland	Glasgow City Region
Private Enterprises (2022)	4,680 private enterprises in Renfrewshire. 87% are micro businesses with less than 10 employees. 11% are small businesses (10 to 49). 2% have been 50 and 250 employees. Less than 1% are classed as large businesses with more than 250 employees. This figure is for VAT	Generally, an equivalent split to that of Renfrewshire's with around 98% of businesses being classed as either micro or small.	Renfrewshire has a higher proportion of larger sized organisations compared to areas such as East Dunbartonshire and East Renfrewshire
	and/or PAYE registered enterprises		
Flowers Eusiness Start Ups (per 10,000 working age population, 2020)	49.5 7.6% decrease from 2017	50.9 8.5% decrease from 2017	53.5 Renfrewshire had the 4th largest number of start-ups (570) with Glasgow City the most with 2,795 and Inverclyde the fewest with 180.
CLOSED	48.7 1.8% decrease from	53.4 2.6% decrease from	50.4 Renfrewshire had the fifth largest number of closures in GCR at 560 with Glasgow City the most with 2,440 and
Business Closures (per 10,000 working age population, 2020)	2017	2017	Inverclyde the fewest with 200.

	Renfrewshire	Scotland	Glasgow City Region
	£2.7 billion	£80.8 billion	£24.3 billion
E	GVA fell by 23% between 2019 and 2020 highlighting the impacts of the pandemic on the	Similarly, GVA in Scotland fell by 19% between 2019 and 2020.	Glasgow City (£11.2 accounts for 46% of the overall region's GVA.
GVA (2020)	local economy.	GVA in Renfrewshire accounts for 3.3% of Scotland's total GVA.	Renfrewshire generates the fourth largest GVA (11%) in the GCR with East Renfrewshire the smallest at £419 million (2%).
	Paisley – 20% Renfrew – 14% Johnstone – 19% Erskine – 0% Braehead – 14% Linwood – 0%		
Town Centre			
Vacancy Rates (2022)	Town Centre Vacancy Rates have increased in Renfrewshire's largest towns between 2019 and 2022 – up 6.4% in Paisley, 6% in Renfrew and 9.2% in Johnstone.		

4. Manufacturing

	Renfrewshire	Scotland	Glasgow City Region
	8,000	176,000	56,250
Number Employed in Manufacturing Sector (2021)	This figure has remained stable between 2019 and 2021 but is a 11% decrease from the 2017 figure (9,000).	The total number of jobs in Manufacturing in Scotland has fallen by 4% from the 2017 figure.	Glasgow City has the highest number of manufacturing jobs in the GCR (19,000) and East Renfrewshire the lowest (500).
A A	692.2	503.7	464.7
	Renfrewshire has a higher rate of employment in manufacturing than the GCR and Scottish rates.		Only Renfrewshire, North Lanarkshire and South Lanarkshire have higher rates than the Scottish average rate.
Number Employed			
in Manufacturing Sector per 10,000			
working age			
population (2021)	9.5%	7.0%	6.5%
	9.5%	7.0%	0.5%
Manufacturing as % of total employment (2021)	This figure is down slightly on the 2017 figure (10.8%) due to a reduction in the manufacturing workforce.	Moray has the highest proportion of employment in manufacturing in Scotland (16.7%) and Edinburgh City the lowest (2.2%).	The proportion of manufacturing jobs in the GCR is lower than the national rate. Renfrewshire has the highest proportion of employment in manufacturing in the GCR (9.5%) and East Renfrewshire the lowest (2.3%).
	6.3%	100%	30.8%
% of Scottish	Renfrewshire contributes a higher proportion to Scottish manufacturing GVA than its overall contribution	Glasgow City produces the highest proportion of Scottish manufacturing GVA (8.7%) and East	The GCR contributes around a third of Scotland's manufacturing GVA
Manufacturing GVA (2020)	to Scottish GVA (3.3%).	Renfrewshire the lowest (0.2%).	

	Renfrewshire	Scotland	Glasgow City Region
	25.5%	13.6%	13.9%
• /	Renfrewshire	Angus produces the	West Dunbartonshire
/ 0	contributes the 8th highest proportion of	highest proportion of local GVA through	produces the highest proportion of local GVA
Manufacturing as a % of GVA (2020)	local GVA through manufacturing in Scotland.	manufacturing (36.2%) and City of Edinburgh the lowest (4.6%).	through manufacturing in the GCR (35.6%) and East Renfrewshire the lowest (4.7%)
	6100		
Expenditure (£) on R&D within businesses per head	£199 Renfrewshire has the 9th highest R&D spend per head of population in Scotland.	£262 West Lothian has the highest spend per head (£972) and East Dunbartonshire the lowest (£22) of the reported figures. Note: 2 councils had figures too low to	£209 Renfrewshire has the 4th highest per head expenditure on R&D in the GCR area. Glasgow City has the highest (£322) in the GCR area and East Dunbartonshire the
of population (2020)		disclose	lowest (£22).
Manufacturing sector expenditure (£m) on R&D expenditure (2020)	£19.0m Renfrewshire has the 8th highest spend on manufacturing R&D in Scotland.	£668.4m Edinburgh City has the highest spend (£181m) and the Shetland Islands the lowest (£0.2m) of the reported figures. Note: 11 councils had figures too low to disclose.	£126.7m Renfrewshire has the 4 th highest expenditure on manufacturing R&D in the GCR area. North Lanarkshire has the highest (£54m) has the highest spend. Only five LAs reported figures
	53%	46%	33%
	Renfrewshire spends a higher % of its R&D expenditure on manufacturing than the		North Lanarkshire has the highest % spend of R&D on manufacturing R&D in the GCR area
Manufacturing R&D expenditure as % of total R&D Expenditure (2020)	Scottish and GCR figures		(77%).

5. Tourism

	Renfrewshire	Scotland	Glasgow City Region
Sustainable employment in tourism (at 2022)	5,695	196,700 A decrease of almost 19,000 employees since 2019.	58,690 This accounts for 30% of Scottish sustainable tourism employment. Renfrewshire has the fourth highest level of sustainable tourism employment (10%) in the Region. Glasgow has the largest with 29,350 (50%) and Inverclyde the smallest with 1,795 (3%).
Direct expenditure (visitors, 2021)	£88.09m This is an increase of 83.4% on the 2020 figure of £48.03m STEAM data was re- commissioned during 2022, and is a year in arrears (i.e. giving 2021 data). Headline data in comparison with 2020 should be understood with the caveat that COVID and related restrictions had a significant impact on the tourism industry	n/a STEAM is commissioned at a local authority level and therefore does not provide a Scotland or city-region wide figure	n/a
Visitors to Events (2022)	15,273 This figure represents visitors to events who came from outwith Renfrewshire and does not include the Christmas events programme . Note that the events programme has had to pivot due to COVID- related impacts		

	1. 01 m	29.5m	6.04m
All Visits to Attractions (2021)	A decrease of 4.1% from 2020 figures. It should be noted that a number of attractions Renfrewshire remained closed for the duration of 2021, including some that had been open in early 2020. In addition, outdoor spaces saw a big increase in 2020 which then decreased during 2021.		

6. Housing

	Renfrewshire	Scotland	Glasgow City Region
Workforce lives and works in their Local Authority area (at 2011)	52.6%	67.5% (of Scottish people live and work in their own local authority area)	Renfrewshire has the 4th lowest proportion of its workforce living and working in the GCR area with Inverclyde the highest (75%) and East Renfrewshire the lowest (45.2%).
Supply of New Housing – Rate per 10,000 Population (2021)	49.8 There was a increase in house building completions in Renfrewshire between 2020 and 2021 from 579 to 725.	41.2 There was an increase in house building in Scotland between 2020 and 2021 from 14,928 to 20,448.	36.5 Renfrewshire has the 3rd highest rate of new house building per 10,000 population in the GCR. South Lanarkshire has the highest (59.2) and Inverclyde the lowest (12.9).

	Renfrewshire	Scotland	Glasgow City Region
Supply of New Housing – Rate per 10,000 Population (average 2017 to 2021)	44.0	34.9	28.8 Renfrewshire has the highest 5-year rate of new house building in the Glasgow City Region. South Lanarkshire has the next highest (43.2) and Glasgow City the lowest (19.8).
% premises with available Fibre broadband connection (2022)	73% 59% increase from January 2021	39%	30% Renfrewshire has the highest rate in the GCR. West Dunbartonshire the lowest 5%.
Urban Vacant and Derelict Land (Hectares; 2021)	205 ha Renfrewshire has experienced a 78% reduction in Urban VDL between 2015 and 2021	9,459 ha Overall Urban VDL has reduced by 27% between 2015 and 2021	3,221 ha This is 29% of the Scottish total. Renfrewshire has the 4th highest total area of vacant and derelict land in the GCR with North Lanarkshire the highest with 1,354 hectares and East Renfrewshire the lowest with 47 hectares.
Urban Vacant and Derelict Land as % of all Scottish V&D land (2021)	2.1%	100%	34.1% Renfrewshire has the 4th highest % of Scottish V&D land in the Glasgow City Region with North Lanarkshire the highest (14.3%) and East

	Renfrewshire	Scotland	Glasgow City Region
			Renfrewshire the lowest (0.5%).
Urban Vacant and	0.5%	0.1%	0.7% Renfrewshire has the 4th highest % of its total area classed as urban vacant or derelict in the GCR, with Glasgow City the
Derelict Land as % of total land area (2021)			highest (2.9%) and South Lanarkshire the lowest (0.2%).
Total Vacant &	36.1 ha	1,049.5 ha	280.6 ha
Derelict Land (Ha) in bottom 15% SIMD areas (2021)	14.9% decrease from 2018	31.2% decrease from 2018	Renfrewshire has the 3rd lowest amount in the GCR. Glasgow City has the highest amount at 515.8, with East Dunbartonshire the lowest with 0.5
	Total Dwellings: 88,355 Owner Occupied – N/A Private vacant/second homes – 2% Private Rented – N/A Socially Rented – 24%	Total Dwellings: 2,645,298 Owner Occupied – 58% Private vacant/second homes – 4%	Total Dwellings: 885,555 Owner Occupied – N/A Private vacant/second homes – 2% Private Rented –N/A
Breakdown of Tenure Type (2020)	,	Private Rented –15%	Socially Rented – 28%
	88%	Socially Rented – 23%	
	This figure is from Renfrewshire's Housing Land Audit. It represents the % of the land supply that will produce units in the port 7 years that is		
Effective Housing Land Supply % Brownfield (2021)	the next 7 years that is classed as brownfield		

Glossary:

Claimant Count: The Claimant Count is a measure of the number of people claiming benefits principally for the reason of being unemployed, based on administrative data from the benefits system.

Employment in low pay sectors: These include employment in the retail and hospitality sectors.

Gender Employment Gap: The percentage point difference between the employment rates for men and women (aged 16-64). This is calculated by subtracting the employment rate for women from the employment rate for men. A positive employment gap indicates a higher employment rate for men compared with women, while a negative employment gap indicates a higher employment rate for women. Employment rate is the number of people in employment (aged 16-64) divided by the overall population (aged 16-64).

School Leavers in Positive Destinations: Includes higher education, further education, training, employment, voluntary work, Personal Skills Development and (Activity Agreements.

Sustainable Tourism: Sustainable Tourism sector was identified in Scotland's Economic Strategy as one of the growth sectors in which Scotland can build on existing comparative advantage and increase productivity and growth. Scotland's tourism sector is a diverse industry, with a range of sub-sectors such as hotels, camping sites and other provision of short stay accommodation, restaurants, bars, travel agents, museums and other recreational and cultural activities.

Vacant and Derelict Land: Vacant land is defined as land within a settlement that has been previously developed, without physical constraint, and which the planning authority has indicated is available for redevelopment. Derelict land is defined as land 'damaged by development, so that it is incapable of development for beneficial use without some remedial works'.