

To: Leadership Board

On: 19 June 2019

Report by: Chief Executive

Heading: Renfrewshire Economic Profile (June 2019) and Economic Development Update

1. Summary

- 1.1 This report contains the fourth edition of the new Renfrewshire Economic Profile. These Economic Profile updates are brought to Board at 6 monthly intervals to allow members to track changes in the local economy.
 - 1.2 The report also offers members an update on new economic development initiatives that have emerged since the last Economic Profile, including proposals for funding support for new Creative Hubs in Renfrewshire and provide an update on the plans for the final stage of development of the former Arnotts site in Paisley town centre; successfully concluding the regeneration of this once vacant and derelict strategic site.
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2. Recommendations

- 2.1 Board members are asked to:
 - i. note the content of the June 2019 Renfrewshire Economic Profile;
 - ii. agree the proposed roll-out of funding support for Creative Hubs from July 2019; and
 - iii. note the outcome of the Park Lane Developments (Renfrewshire) LLP Company's options review and their decision on the preferred option for the fourth and final phase of the development of the former Arnott's site, for mixed tenure housing.
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3. Background

- 3.1 Leadership Board receive 6-monthly updates relating to the economic performance of Renfrewshire. The last update of this type was presented to the Leadership Board in November 2018.
- 3.2 The purpose of the economic profile is to describe and track the local demographics and economic indicators within Renfrewshire on a 6-monthly basis. The range of indicators presented has also been extended to try to reflect a broader indication of the current health of the Renfrewshire economy and its content will be kept under review to ensure it continues to meet this aim. The data and analysis presented provides a context and a baseline to assess how well Renfrewshire performs in terms of its economic activities over time.
- 3.3 In terms of the profile, officers have selected Scotland and Glasgow city-region as the most appropriate comparators. The national average is a commonly used guide by most local authorities in terms of relative performance. The city-region now has an approved Economic Strategy (Feb 2017) and Renfrewshire's relative performance against the other seven member authorities will be assessed as part of the Action Plan for that Strategy. Therefore, it makes sense for members to be kept abreast of the relative performance of Renfrewshire against the rest of the city-region.
- 3.4 In May 2019 a draft Economic Strategy for Renfrewshire was presented to the Economic Leadership Panel. This external Panel is made up of representatives from across the local economy and is currently chaired by Mr. James Lang of the Scottish Leather Group. The Council is represented on the Panel by the Leader and Chief Executive. The Economic Strategy will be recommended to the Leadership Board in autumn 2019 as the preferred Strategy of the Panel. The Regional Economic Strategy is also due to be reviewed in 2019.
- 3.5 Members comments are welcomed on the format and content of the Economic Profile. On each publication the Profile will be shared with stakeholders and become the key source of data relating to the performance of the local economy. This will offer a relative benchmark from which to assess performance over time. The Profile will align with the forthcoming Renfrewshire Economic Strategy and Action Plan.

4. Key issues arising from Economic Profile

- 4.1 In terms of the latest version of the Economic Profile the table below assesses a selection of the latest statistics against Renfrewshire Council Plan and Community Plan strategic objectives to allow members to see progress against some of the authorities' key priorities.

Community Plan or Council Plan objective	Economic Indicator (June 2019)	Comment
Growing our working age population by encouraging people to stay here, and attracting new people to settle here	Renfrewshire working age population has increased in the last 12 months (now approx. 114,500 persons).	Renfrewshire ratio of working age population is comparable with Scotland and the Glasgow city-region (64.4%). This indicator is closely related to the number of jobs in

Community Plan or Council Plan objective	Economic Indicator (June 2019)	Comment
	After a few years of no growth, Renfrewshire's population is now forecast to grow in the next two decades	Renfrewshire and the number of those employees who choose to live locally.
<p>Achieving Inclusive Growth by making sure Renfrewshire's investment and opportunities deliver for all;</p> <p>Supporting youth employment;</p> <p>Equipping people with the skills and pathways to access opportunities and making sure people can access work which affords them an acceptable standard of living;</p>	<p>Renfrewshire's employment rate is around 75% based on the latest statistics. This is a slight decrease since Nov 2018.</p> <p>Average weekly earnings of those who work in Renfrewshire (£523) is lower than those who live in Renfrewshire (£587). This is to be expected given the connectivity of Renfrewshire to the city centre and wider city region. Both figures have increased in the last 6 months.</p> <p>The manufacturing sector accounts for 10.7% of Renfrewshire's total employment and 23% of the area's GVA.</p> <p>The Profile also emphasises the number of people employed in manufacturing pro rata [794 per 10,000 pop compared to 523 nationally and 461 in GCR as a whole]</p>	<p>Renfrewshire has the 3rd highest employment rate among the eight Glasgow city region authorities and is above the national average (74%);</p> <p>South Lanarkshire has the highest average weekly earnings for those working in their area in the city region at £574. This is higher than the Scottish average earning of £563 per week.</p> <p>Manufacturing is a very important sector in the Renfrewshire economy to the extent that has the highest level of any of the 8 city region authorities. The comparable GCR figures are 9% and 15% respectively.</p>
Deliver on the ambitions of our town centre strategies	The vacancy levels of pedestrian street access level commercial units vary quite significantly across Renfrewshire's six town centres (at spring 2018) ranging from Paisley at 14% vacancy and Johnstone at 12% to Linwood which currently has no vacant units.	<p>In Paisley Town Centre, the areas with the highest concentrations of vacant units include New Street (27%), the Paisley Centre (20%), High Street (18%) and the Piazza Centre (16%).</p> <p>It should be noted that many of the units currently vacant in PTC are not in a suitable condition for immediate use.</p>

Community Plan or Council Plan objective	Economic Indicator (June 2019)	Comment
<p>Deliver a range of diverse and exciting events to increase visitor numbers and grow local event attendances;</p> <p>Promoting a positive image and reputation of Paisley, and Renfrewshire as a whole, in Scotland, the UK and internationally</p>	<p>Attendees at Renfrewshire events and attractions have increased by between 30,000 and 40,000 since 2015</p>	<p>The number of visits to attractions and events has increased significantly in Renfrewshire in recent years due to the level of investment in the events programme by the Council and other partners. Due to the relatively low base the proportional increase has been far greater than the city region or Scotland as a whole.</p>
<p>Promoting Renfrewshire as a place to live, work in and visit</p> <p>Making sure the infrastructure is in place to support growth in local economy and population (such as housing, transport and schools)</p>	<p>About 950 new homes were completed in Renfrewshire in the calendar year to Dec 2018.</p> <p>Just over 36 new homes have been built in Renfrewshire in the last 5 years for every 10,000 people who live here.</p> <p>Just over half of Renfrewshire's workforce (52%) have jobs within the authority area. This is a much lower proportion than the Scottish L/A average figure of (67%).</p> <p>Renfrewshire has a lower proportion of business start-ups than the Scottish or city-region average.</p>	<p>Renfrewshire has achieved a significant level of new housebuilding in the last 12 months compared to the national average. However, this needs to be read against the trend over the last 5 years which sees Renfrewshire much more closely aligned to the national average. A significant proportion of this new housebuilding has related to the timing of completions on the Dargavel site at Bishopton.</p> <p>Over the last 5 years the Scottish average has been 32 new homes for every 10,000 people.</p> <p>Renfrewshire is well connected and accessible to other parts of the city region. This leads to a large section of the workforce commuting to jobs outside the District.</p> <p>The data presented in this latest profile has been re-based to show the rate of new business formation per 10,000 working age people. This is a more accurate ratio than using the entire population. The ratios have therefore changed and are not comparable with earlier</p>

Community Plan or Council Plan objective	Economic Indicator (June 2019)	Comment
	<p>Renfrewshire has a legacy of land defined as vacant & derelict (some 250 hectares in total at 2018). This is a significant issue for GCR which contains about a third of all such land nationally.</p>	<p>versions of the Economic Profile for this element.</p> <p>Over the next 7 years, Renfrewshire will see almost 9 out of every 10 homes built on brownfield land. This ambitious target, together with proposed City Deal investments, will see a significant proportion of the vacant & derelict in the area being brought back into productive use.</p> <p>Successful housing developments in the town centre including the development of the former Council HQ site by Westpoint Homes, and the Arnotts Department store, are contributing to town centre vibrancy, bringing new households to live in the town centre.</p>

5. Creative Hubs Development Fund

- 5.1 During and following the UK City of Culture bid process it became clear that there is a currently unmet demand in Renfrewshire for premises and spaces for creative individuals and businesses to operate from and engage with like-minded people. This has been confirmed by the Creative Industries Group that has supported the preparation of a new Economic Strategy for Renfrewshire during 2018/19. A key objective of the Council is to support the growth and development of local companies and to support businesses to locate in Renfrewshire, offering employment and economic growth to the area
- 5.2 The proposed intention by officers is to develop a new business development fund to support the creation of early stage, low cost, creative hubs across Renfrewshire. This would support the Council's ambitions around growing a significant new dimension to the economy through the creative industries, digital and cultural tourism.
- 5.3 Support for the developments would be provided through the current staff and budgets of the Council's Economic Development Team and would add value to the existing support offered through InCube, Business Gateway and the new Start-Up Street initiative.

- 5.4 A Creative Hub, for the purposes of this proposal, would be defined as a creative business space supporting more than one creative business falling within the current creative industries sub sectors (eg. architecture, design, craft, advertising, digital, film and tv, etc) and that pursue creative, social, innovation and economic benefit within their business models.
- 5.5 The Creative Hubs would be business led and business managed with start-up support from the Council. They would encourage businesses to work together, share accommodation, reduce costs and facilitate creative collaborations.
- 5.6 The proposal is modelled on the support to be provided through the new Start-Up Street initiative but is geared specifically at creative businesses requiring a different type of space and for a longer period. The Creative Hubs would be long-term investments for the established businesses, providing a growing number of new sustainable multi-business spaces for the future.
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6. The Creative Hub Proposal

- 6.1 A budget of up to £50k per annum has been made available to subsidise the costs for establishing up to 4 new independent Creative Hubs each year across Renfrewshire.
- 6.2 The Creative Hubs will not be within existing managed workspaces/ business centres but should be independent spaces anywhere in Renfrewshire. The subsidy and support will be provided to the leaseholder of the premises (the “lead” creative business) but all businesses within the hub would benefit from the same subsidy which will amount to:
- 75% premises/property costs for the first 6 months
 - 50% premises/property costs for the second 6 months
 - 25% premises/property costs for the third 6 months
- 6.3 Funding for the same types of Creative Hub will not be provided unless unmet demand can be clearly demonstrated. It is also not the intention to duplicate existing services already offered by other hubs or organisations.
- 6.4 Existing Creative Businesses who wish to utilise their premises as a new creative hub can do so. In that case the subsidy from the Council will be used to support the additional new businesses locating to that hub. The costs to the new business (before the Council subsidy) must be fair and proportionate to the overall costs of the premises.
- 6.5 Interested businesses should complete an application form (attached) with the support of a Business Gateway Advisor based at InCube. The and details of the space to be occupied.
- 6.6 Applications can be submitted at any time of the year, with an accompanying business plan, and will be dealt with on a case by case basis. Applications are strengthened by local research identifying the need and demand for the creative hub and that there are businesses / creative people ready to move in. The Fund will be publicised through the Council’s social media and other channels once launched.

6.7 The overall aim is:

- to create a network of new creative hubs across Renfrewshire accommodating and supporting a wide range of small creative businesses.
- for Renfrewshire to become the place of choice for creative businesses in Scotland.
- to support more businesses to start-up, or relocate to, Renfrewshire;
- to add value to the current business development, offer and to encourage longer term sustainment figures for Renfrewshire's businesses.

6.8 By the end of 2022 there will be a well-established range of creative business hubs across Renfrewshire. They will raise the profile of the area, support a creative community and help to retain and attract creative talent within the area.

6.9 The Hub would be led by a single business or by a collaboration or partnership, and could offer any of the following:

- hotdesking
- studio space
- training, workshops, events
- networking opportunities
- mobile working
- access to equipment, skills, resources, networks
- incubation, business support, mentoring, financing
- retail and promotional opportunities
- research and development

6.10 It is proposed to launch the Creative Hubs application process at the start of July 2019. Further reports will be brought back to Board to update on the progress of the Creative Hubs initiative.

7. Update on the development of the Former Arnott's Site, Paisley

7.1 The former Arnott's site in Paisley Town Centre became vacant in 2002 when the department store closed. It was the largest vacant/ semi derelict site in the town centre and one of the most significant regeneration challenges facing the town centre.

7.2 In 2009 the Council entered into a Limited Liability partnership with Park Lane Developments. On establishing the LLP the Council invested £3.03 million by way of loan capital to support the company to purchase and develop out the site. Park Lane as the partner also provided loan facilities up to a maximum value of £1 million to progress the development masterplan. The Council's investment was funded through a combination of Scottish Government Town Centre Regeneration Grant and the 2009/10 capital programme.

- 7.3 At the outset of the LLP the economic climate was extremely challenging as the timing of the formation of the LLP coincided with the economic recession and this had a significant, negative impact on the property and retail market. The company therefore was unable to attract commercial investment in the site and a decision was taken to change the focus of the redevelopment of the site from retail to mixed tenure housing.
- 7.4 Phase 1 of the housing led redevelopment of the site was assisted by affordable housing programme grant funding through the Scottish Government, and supported the development of 31 new build affordable homes by Link Housing Association. Six shared equity flats and 25 mid- market rent flats were successfully developed on the portion of the site adjacent to the Arnott's Building and wrapping around the corner onto Lawn Street.
- 7.5 This was followed by the development of the historic Arnott's Building itself, restoring the historic façade and providing a retail unit on the ground floor with 11 luxury flats for sale. This phase was successfully completed in 2016 with the retail unit now occupied by Pendulum Bar and Grill Ltd. The 11 luxury flats were pre-sold in advance of completion.
- 7.6 Phase 3 of the development is currently on site and will deliver 26 homes for social rent by Link Housing Association supported by grant through the affordable housing programme, with completion scheduled for Spring 2020.
- 7.7 The LLP then delayed progressing the masterplan for Phase 4 of the site at the Council's request to allow for the outcome of the City of Culture Bid, which may have required use of this town centre space to accommodate events or other temporary amenities for the festival. In April 2018 a request was received from Paisley Community Trust for a community asset transfer of the site to enable their Cinema/Theatre proposal. In response to this request, the Council asked the LLP to defer marketing or further development of the site to allow the Trust time to develop and submit a detailed business case for their proposals for the site by end December 2018. This deadline was then extended to end March 2019.
- 7.8 Following a review of the business case and feedback from council officers, the Trust recently made a revised proposal to the LLP to use the site with a phased development, with the first phase using adapted shipping containers to provide spaces for a variety of temporary purposes, and a longer term development plan. The ambition to use the site for the cinema and performing arts venue no longer forms part of these proposals, and officers are currently working with the PCT to consider alternative sites in the town centre which may be better suited to a cinema.
- 7.9 Recent market activity indicates a growing demand for residential accommodation in the town centre and the success of the earlier 3 phases is providing a level of confidence of market interest in the site. A site capacity study confirms that the site can comfortably support the development of at least 60 flats. The LLP Board has considered three options to complete the final phase of development of the site, although option 1 was withdrawn by PCT after the appraisal had taken place.

Option 1 was to sell the site to PCT for a sum below market value subject to a successful funding application by PCT to the Scottish Land Fund.

Subsequent to the proposed land acquisition by the trust, the PCT proposal outlined a short term development plan utilising adapted shipping containers, to provide spaces for a variety of temporary purposes. Additionally, the proposal outlined a longer term vision to deliver a phased commercial development plan which it envisaged would be subject to several evolutions in response to future market demands and opportunities. The proposal anticipated that both the short term transition stage and longer term development stage would be financed through the creation, development and implementation of a community led fundraising strategy.

Option 2 proposed the direct marketing of the site on the open market for sale and subsequent development delivering a capital receipt to the Council via LLP.

Option 3 proposed that the LLP take forward delivery of this next phase of development in partnership with an RSL, delivering a mixed tenure development of around 60 units commencing on site in Summer 2020 with a capital receipt to the Council via LLP following the successful completion of the development and sale of the units.

- 7.10 The outcome of the LLP Board's appraisal is that option 3 – LLP delivery of a mixed tenure development in partnership with an RSL – is the preferred option. This provides the greatest level of confidence in respect to the timeous completion of the delivery of the successful re-development of the final phase of the site, whilst securing a positive financial return to the Council for re-investment in other priorities. Allowing for necessary consents, it is expected that work on phase 4 will commence in summer 2020 following on from the completion of phase 3 and subject to necessary statutory consents.

Implications of the Report

1. **Financial** – The Creative Hubs Development Fund can be funded from within existing budgets. It is envisaged that the option being progressed by the LLP Board for Phase 4 of the Arnotts site redevelopment, will generate a level of positive financial return for the Council that will facilitate the repayment of the carrying value of the Council's outstanding investment in the LLP and provide resources for re-investment in other priorities.
2. **HR & Organisational Development** – none
3. **Community Planning** –
 - **Empowering our Communities** – the new Economic Profile will enable communities to have a clearer understanding of the relative performance of the Renfrewshire economy. The Creative Hubs will present the opportunity for new entrepreneurs to take their creative business ideas forward to fruition;

- **Jobs and the Economy** - the new Economic Profile will present a clearer picture of the relative performance of the Renfrewshire economy. The Creative Hubs offers the opportunity to support one of Renfrewshire's anticipated key future business sectors;
 - **Regeneration** – the completion of phase 4 of the former Arnott's site will complete the regeneration of a large derelict site in Paisley Town Centre contributing to town centre vibrancy through the addition of new residents and new opportunities to live in town centres. This is very much in line with the approved Paisley Town Centre Action Plan and the key driver to repurpose and regenerate the Town Centre offer.
4. **Legal** – none
 5. **Property/Assets** – If a Creative Hub was proposed within a Council owned building, then this would be dealt with in the normal manner through a negotiated lease by the Council's Property Services Team. The development funding would still be available to the principal leaseholder.
 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.

List of Background Papers

- (a) Economic Profile; Leadership Board; 5 Dec 2018

The foregoing background papers will be retained within the Chief Executives Service for inspection by the public for the prescribed period of four years from the date of the meeting. The contact officers within the service are Alasdair Morrison; Head of Regeneration; Chief Executive's Service; T-0141 6184664; alasdair.morrison@renfrewshire.gov.uk and Ruth Cooper; Economic Development Manager; Chief Executive's Service; T-01416187868; ruth.cooper@renfrewshire.gov.uk;

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Renfrewshire Economic Statistics (May 2018)

RENFREWSHIRE

SCOTLAND COMPARISON

GLASGOW CITY
REGION COMPARISON

Population



Population (2017)

176,830

Increase of 1.1% on 2011

5,424,800

Increase of 2.4% on 2011

1,827,240

Increase of 2.2% on 2011



Population Projection (at
2041, 2016 based)

181,603

3% increase on 2016

5,693,201

5.3% increase on 2016

1,894,090

4.2% increase on 2016



Births

1,776

53,436

18,940



Deaths

2,041

57,246

19,743



Net migration

1,162

+0.5% yearly change

23,855

+0.4% yearly change

10,124

+0.5% yearly change

Components of
population change (mid
2016-mid 2017)



Life expectancy (2014-16)

Male - 76.4 years

Female - 80.2 years

Male - 77.1 years

Female - 81.1 years

Renfrewshire has the fourth highest life expectancy for males of the 8 LAs and the fourth highest life expectancy for females.

Glasgow has the lowest male LE (73.4 yrs) and East Dunbartonshire has the highest (80.1 yrs).
















% of population that is of
working age (16-64 yrs)
(at 2017)


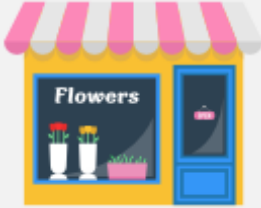


64.4%





64.4%





65.9%



	RENFREWSHIRE	SCOTLAND COMPARISON	GLASGOW CITY REGION COMPARISON
Employment			
 Employment Rate (Jan-Dec 2017)	76.1%	74.3%	Renfrewshire has the highest employment rate in the Glasgow City Region. East Renfrewshire has the next highest (75.3%) and Glasgow the lowest (66.0%)
 Unemployment Rate (Jan-Dec 2017)	4.3%	4.1%	Renfrewshire has the fourth highest unemployment rate in the Glasgow City Region. East Renfrewshire has the lowest (3.3%) and Glasgow the highest (5.7%).
 Occupations (Workplaces in Renfrewshire; at 2016)	Renfrewshire has above average employment in: <ul style="list-style-type: none"> • Manufacturing (9,000 jobs) • Transportation and storage (7,000) • Wholesale and retail trade (15,000) • Human health and Social Work (12,000) 	Scotland is closer to Renfrewshire in terms of the proportion for human health and social work employment but is significantly lower in the other sectors.	Renfrewshire has much higher proportions of employment than the Glasgow City Region as a whole in: <ul style="list-style-type: none"> • manufacturing, and • transportation and storage
 Earnings (at 2017)	Median weekly earnings for full-time employees living in Renfrewshire are £576.20 Median weekly earnings for full-time employees working in Renfrewshire are £516.00	Median weekly earnings for full-time employees living in Scotland are £547.70 Median weekly earnings for full-time employees working in Scotland are £547.30	Renfrewshire has the third highest resident earnings in the Glasgow City Region, with East Renfrewshire the highest (£685.40) and West Dunbartonshire the lowest (£511.80). Renfrewshire has the third lowest workplace earning in the Glasgow City Region, with South Lanarkshire the highest (£582.70) and East Renfrewshire the lowest (£455.60)
 Qualifications NVQ4 and above % of pop 16-64 yrs (Jan-Dec 2017)	42.4%	43.9%	Renfrewshire is slightly above the overall average for the Glasgow City Region (41.4%) Renfrewshire has the fourth highest rate of qualification at this level with East Dunbartonshire the highest (55.8%) and West Dunbartonshire the lowest (32.9%)

Travel to Work Survey SHS (2016)		3.1%		12.3%	<p>Renfrewshire has the fourth highest % driving to work in the Glasgow City region with Glasgow City the lowest (55.1%) and North Lanarkshire the highest (79.9%).</p> <p>Renfrewshire has the fourth lowest % taking bus/rail services to work in the Glasgow City region with Glasgow City the highest (28%) and North Lanarkshire the lowest (12.7%).</p>
	Walk		Walk		
		73.0%		67.0%	
	Car/van		Car/van		
		2.1%		2.6%	
	Cycle		Cycle		
		19.5%		15.6%	
	Bus / Rail		Bus / Rail		

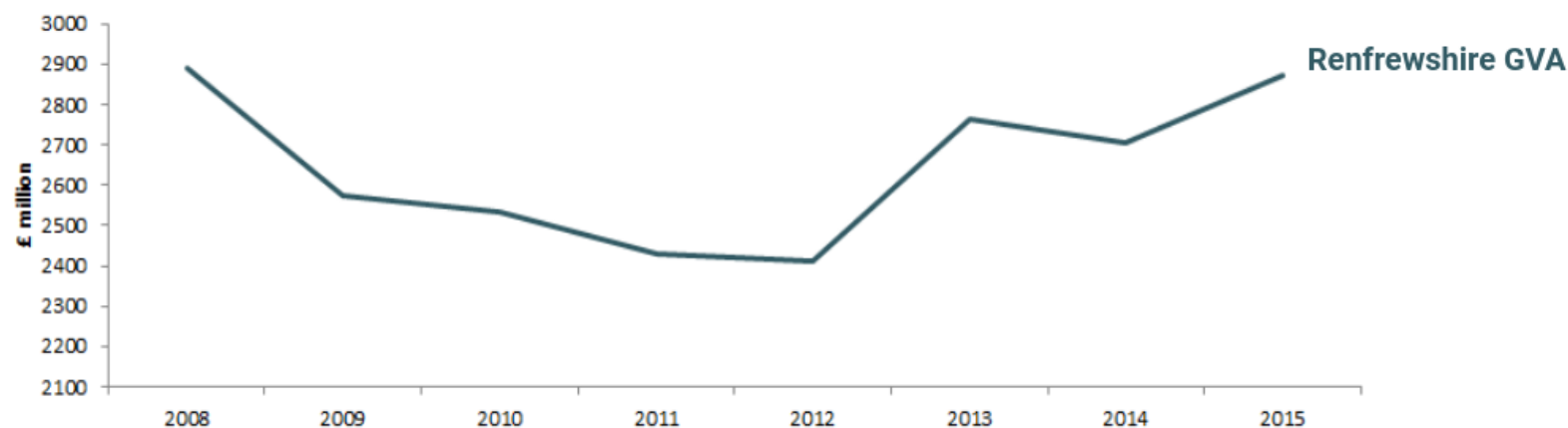
	RENFREWSHIRE	SCOTLAND COMPARISON	GLASGOW CITY REGION COMPARISON
Business			
 Private Enterprises (2017)	4,565 private enterprises in Renfrewshire 86.2% have less than 10 employees 0.7% have more than 250 employees (See appendix two)	Broadly equivalent proportion of small enterprises (less than 10 employees) at 88% Smaller proportion of large businesses (0.4%)	Equivalent proportion of small enterprises (less than 10 employees) at 87.6% Smaller proportion of large businesses (0.5%)
 Business Start Ups (2016)	720	22,270	The 7,805 Business start-ups in the Glasgow City Region account for 35% of the Scottish total. Renfrewshire had the fourth largest number of start-ups (9.2%) with Glasgow City the most with 3290 (42.2%) and Inverclyde the fewest with 230 (2.9%) .
 Business Closures (2016)	645	20,980	The 7,005 Business closures in the Glasgow City Region account for 33% of the Scottish total. Renfrewshire had the fourth largest number of closures in GCR (9.2%) with Glasgow City the most with 3,230 (46.1%) and Inverclyde the fewest with 235 (3.4%) .
 GVA (2015)	£2.9 billion (see appendix one for full breakdown)	£90.0 billion	£26.1 billion This accounts for 28.9% of Scottish GVA. Glasgow City accounts for 45% of the overall region GVA. Renfrewshire has the fourth largest GVA (11%) with East Renfrewshire the smallest at £531 million (2%).

	RENFREWSHIRE	SCOTLAND COMPARISON	GLASGOW CITY REGION COMPARISON
Tourism			
 <p>Sustainable employment in tourism (at 2015)</p>	5,800	217,200	<p>60,900</p> <p>This accounts for 28% of Scottish sustainable tourism employment. Renfrewshire has the fourth highest level of employment (9.5%). Glasgow has the largest with 30,800 (50.6%) and East Renfrewshire the smallest with 1800 (3%)</p>
 <p>Hotel Capacity (2017)</p>	<p>21 hotels</p> <p>1,793 capacity</p>		
 <p>Sustainable Tourism GVA (at 2014)</p>	£81m	£3,674.9m	<p>£985.6m</p> <p>This accounts for 27% of Scottish sustainable tourism GVA. Renfrewshire has the fourth highest tourism GVA (8.2%). Glasgow has the largest with £576.2 million (58.5%) and East Renfrewshire the smallest with £21.8 million (2.2%).</p>
 <p>Visits to attractions (2016)</p>	<p>1,735,106</p> <p>visits, a growth of 24.6% on 2015 (8% of GCR)</p>	<p>61,571,621</p> <p>visits, a growth of 4.7% on 2015</p>	<p>20,379,743</p> <p>visits, a growth of 3.6% on 2015</p> <p>(33% of Scottish visits)</p>

	RENFREWSHIRE	SCOTLAND COMPARISON	GLASGOW CITY REGION COMPARISON
Housing			
 <p>Workforce lives and works in their local authority area (at 2011)</p>	52.6%	<p>67.5%</p> <p>(of Scottish people live and work in their own local authority area)</p>	Renfrewshire has the fourth lowest proportion of its workforce living and working in the LA area with Inverclyde the highest (75%) and East Renfrewshire the lowest (45.2%).
 <p>Supply of new housing rate per 10,000 population (2016/17)</p>	44.6	<p>34.3</p> <p>There was an increase in house building in Scotland between 15/16 to 16/17, rising from 17,968 to 18,539</p>	<p>29.4</p> <p>Renfrewshire has the second highest rate of new house building in the Glasgow City Region.</p> <p>East Dunbartonshire has the highest (44.8) and Inverclyde the lowest (12.3).</p>
 <p>Supply of new housing rate per 10,000 population (average over last five years 2012/13-2016/17)</p>	32.1	31.5	<p>28.6</p> <p>Renfrewshire has the second highest rate of new house building in the Glasgow City Region.</p> <p>East Dunbartonshire has the highest (40.6) and North Lanarkshire has the lowest (19.1).</p>
 <p>Urban Vacant and Derelict Land (hectares; 2016)</p>	860	12,435	<p>4,067</p> <p>This is 33% of the Scottish total. Renfrewshire has the third highest total area of vacant and derelict land in GCR (21%) with North Lanarkshire the highest with 1,222 hectares (30%) and East Renfrewshire the lowest with 55 hectares (1%)</p>

 Urban Vacant and Derelict Land as % of all Scottish V&D land (2016)	7%	N/A	33% Renfrewshire has the third highest % of Scottish V&D land in the Glasgow City Region, with North Lanarkshire the highest (10%) and East Renfrewshire the lowest (0.4%).
 Urban Vacant and Derelict Land as % of total land area	3.3%	0.2%	1.2% Renfrewshire has the second highest % of its total area classed as urban vacant or derelict with Glasgow City highest (6.3%) and South Lanarkshire the lowest (0.2%).

Appendix one - Renfrewshire Gross Value Added at Basic Prices (£million)



Description	2008	2009	2010	2011	2012	2013	2014	2015	% of 2015
Accommodation and food service activities	66.8	55.4	89.3	59.2	78.2	107.6	73.8	87.6	3.1%
Administrative and support service activities	161.9	162.7	153.1	171.8	226.7	309.5	315.6	235.8	8.2%
Arts, entertainment and recreation	59.9	59.8	40.8	42.8					
Arts, entertainment and recreation (2)					32.7	117.5	-7	42.4	1.5%
Construction	308.9	188.3	190.5	195.7	216.6	244.8	275.4	301.5	10.5%
Education, human health and social work activities	64	54	62.6	62	60.3	62.5	63.8	73.7	2.6%
Information and communication	123.7	94.8	81.9	86.2	93.3	97.4	97.6	118.2	4.1%
Manufacturing	797.7	753.7	867.9	740.5	719.5	696.2	643.5	588.1	20.5%
Other service activities	16.2	26.5	25.6	28.1	51	61.5	85.3	116.6	4.1%
Primary Industries	148.2	106.3	73	60	29.4	18	29.4	48.1	1.7%
Professional, Scientific and Technical Activities	140.8	130	169.3	116.8	155.1	175.4	194.4	232.1	8.1%
Real estate activities	31.3	24.1	30.3	53.7	41.8	44.7	61.2	71.4	2.5%
Transport and storage	506.6	509.1	479.1	462.9	296	350.1	410.9	477.2	16.6%
Wholesale, retail and repairs	462.9	407.4	268.6	348.5	408.9	479.5	463	477	16.6%
TOTALS (excludes financial, parts of agriculture and the public sector)	2888.7	2572.1	2532.1	2428.3	2409.4	2764.7	2706.9	2869.9	


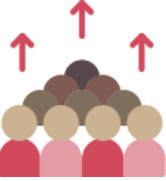






(2) Data on purchases for 2012 onwards has been produced using a new method for apportionment.

Appendix two – Private Enterprises by SIC Code (2015)





Description	2008	2009	2010	2011	2012	2013	2014	2015
1. Primary Industries	51	46	44	48	48	53	57	57
2. Manufacturing	280	280	281	293	310	306	306	342
2.1 Manufacture of Food, Beverages and Tobacco products	23	25	22	23	23	23	23	20
2.2 Manufacture of Textiles, Wearing apparel and Leather products	18	16	17	19	21	17	18	19
2.3 Manufacture of Wood, Paper and Printing products	38	36	38	39	38	39	39	46
2.4 Manufacture of Coke, Chemicals, Pharmaceutical, Rubber and Mineral products	37	35	33	31	29	36	33	33
2.5 Manufacture of Basic and Fabricated metals, Machinery, Motor Vehicles and Other transport equipment	84	83	83	79	79	79	86	96
2.6 Manufacture of Computer, electronic and Electrical equipment	23	27	26	26	23	27	30	32
2.7 Manufacture of Furniture, Other manufacturing, Repair and installation	57	58	62	76	97	85	77	96
3. Construction	568	562	561	568	552	581	586	607
3.1 Construction of buildings	138	136	121	116	97	103	103	113
3.2 Civil engineering	45	47	46	47	43	44	48	49
3.3 Specialised construction activities	385	379	394	405	412	434	435	445
4. Transport and storage	267	263	254	243	236	232	241	258
5. Wholesale, retail and repairs	1103	1070	1063	1080	1078	1077	1075	1067
5.2 Wholesale and retail trade and repair of motor vehicles and motorcycles	136	136	132	144	147	148	156	160
5.3 Wholesale trade, except of motor vehicles and motorcycles	235	240	246	244	247	245	240	234
5.4 Retail trade, except of motor vehicles and motorcycles	732	694	685	692	684	684	679	673
6. Accommodation and food service activities	399	396	394	385	361	382	381	379
6.1 Accommodation	29	30	30	33	30	32	30	30
6.2 Food and beverage service activities	370	366	364	352	331	350	351	349
7. Information and communication	206	197	188	200	209	202	208	226
8. Real estate activities	139	146	146	155	161	161	153	155
9. Professional, Scientific and Technical Activities	614	597	610	631	687	738	778	821
9. Administrative and support service activities	357	321	310	327	316	339	348	354
11. Education, human health and social work activities	214	220	243	247	243	245	261	263
12. Arts, entertainment and recreation	168	160	157	158	156	164	160	157
13. Other service activities	291	285	275	286	273	264	253	254
TOTALS (excludes financial sector & parts of agriculture and the public sector)	4657	4543	4526	4621	4630	4744	4807	4940






Renfrewshire Economic Profile (June 2019)

1. Population


	Renfrewshire	Scotland	Glasgow City Region
 <p>Population (2018)</p>	<p>177,790</p> <p>Increase of 1.9% on 2011</p>	<p>5,438,100</p> <p>Increase of 3.9% on 2011</p>	<p>1,834,180</p> <p>Increase of 3.5% on 2011</p>
 <p>Population projection (at 2041, 2016 based)</p>	<p>181,603</p> <p>3% increase on 2016</p>	<p>5,693,201</p> <p>5.3% increase on 2016</p>	<p>1,894,090</p> <p>4.2% increase on 2016</p>
 <p>Births</p>	1,746	52,248	18,372
 <p>Deaths</p>	2,147	59,911	20,531
 <p>Net migration</p>	1,340	20,900	9,050
<p>Components of population change (mid 2017 – mid 2018)</p>	+0.5% yearly change	+0.2% yearly change	+0.1% yearly change
 <p>Male</p>	76.2 years	77.0 years	<p>Renfrewshire has the 4th highest LE for males and the 4th highest life expectancy for females.</p> <p>Glasgow has the lowest male LE (73.4yrs) and East Ren. the highest (80.5yrs).</p> <p>Glasgow also has the lowest female LE (78.7yrs) and East Ren. has the highest (83.8yrs).</p>
 <p>Female</p>	80.2 years	81.1 years	
<p>Life Expectancy (2015-17)</p>			
 <p>% of population that is of the working age (16-64yrs) (at 2018)</p>	64%	64%	64%





2. Employment

	Renfrewshire	Scotland	Glasgow City Region
 <p>Employment Rate (Jan – Dec 2018)</p>	75.2%	74.1%	<p>Renfrewshire has the 3rd highest employment rate in the GCR.</p> <p>East Dunbartonshire has the highest (77.7%) and Glasgow City has the lowest (64.3%).</p>
 <p>Unemployment Rate (Jan-Dec 2018)</p>	4.7%	4.3%	<p>Renfrewshire has the 3rd highest unemployment rate in the GCR.</p> <p>East Ren. has the lowest (3.4%) and Glasgow the highest (5.9%).</p>
 <p>Occupations (Workplaces in Renfrewshire; at 2017)</p>	<p>Renfrewshire has above average employment in:</p> <ul style="list-style-type: none"> • Manufacturing (9,000 jobs) • Transportation and storage (7,000) • Wholesale and retail trade (14,000) • Administrative and support services (9,000) 	<p>Scotland is closer to Renfrewshire in terms of the proportion for human health and social work employment but is significantly lower in the other sectors.</p>	<p>Renfrewshire has much higher proportions of employment than the GCR in:</p> <ul style="list-style-type: none"> • manufacturing, and • transportation/storage
 <p>Earnings (at 2018)</p>	<p>Median weekly earnings for full-time employees <u>living</u> in Renfrewshire are £587.00</p> <p>Median weekly earnings for full-time employees <u>working</u> in Renfrewshire are £523.50</p>	<p>Median weekly earnings for full-time employees <u>living</u> in Scotland are £562.70</p> <p>Median weekly earnings for full-time employees <u>working</u> in Scotland are £563.20</p>	<p>Renfrewshire has the 3rd highest resident earnings in the GCR with East Ren. the highest (£744.10) and West Dunbartonshire the lowest (£518.80)</p> <p>Renfrewshire has the 3rd lowest workplace earning in the GCR with South Lanarkshire the highest (£574.90) and East Ren. the lowest (£495.90)</p>





 Qualifications NVQ4 and above as % of pop 16-64yrs (Jan-Dec 2018)	40.5%	44.2%	Renfrewshire has the 4 th highest rate of qualification at this level with East Dunbartonshire the highest (55.7%) and West Dunbartonshire the lowest (35.2%) .
 Walk	3.1%	12.3%	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%) .
 Drive (car/van)	73.0%	67.0%	
 Cycle	2.1%	2.6%	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%) .
 Bus / rail	19.5%	15.6%	
Travel to Work Survey SHS (2016)			





3. Business

	Renfrewshire	Scotland	Glasgow City Region
 <p>Private Enterprises (2018)</p>	<p>4,575 private enterprises in Renfrewshire</p> <p>85.8% have less than 10 employees</p> <p>0.8% have more than 250 employees</p> <p>This figure is for VAT and/or PAYE registered enterprises.</p>	<p>Slightly higher proportion of small enterprises (less than 10 employees) at 87.9%.</p> <p>Smaller proportion of large businesses (0.4%).</p>	<p>Equivalent proportion of small enterprises (less than 10 employees) at 87.6%.</p> <p>Smaller proportion of large businesses (0.5%).</p>





 <p>Business Start Ups (per 10,000 working age population, 2017)</p>	57.1	61.7	<p>59.9</p> <p>Renfrewshire had the 4th largest number of start-ups 650 (9%) with Glasgow City the most with 3,105 (36%) and Inverclyde the fewest with 215 (4%).</p>
 <p>Business Closures (per 10,000 working age population, 2017)</p>	52.2	58.2	<p>55.4</p> <p>Renfrewshire had the fourth largest number of closures in GCR at 595 (9%) with Glasgow City the most with 2,935 (44%) and Inverclyde the fewest with 200 (3%).</p>
 <p>GVA (2016)</p>	<p>£2.82 billion</p> <p>(see appendix one for full breakdown)</p>	<p>£83.3 billion</p>	<p>£23.7 billion</p> <p>This accounts for 28.9% of Scottish GVA.</p> <p>Glasgow City accounts for 45% of the overall region GVA. Renfrewshire has the fourth largest GVA (11%) with East Ren. the smallest at £531 million (2%).</p>
 <p>Town Centre Vacancy Rates (Spring, 2018)</p>	<p>Paisley – 14%</p> <p>Renfrew – 9%</p> <p>Johnstone – 12%</p> <p>Erskine – 3%</p> <p>Braehead – 8%</p> <p>Linwood – 0%</p>	<p>Within Paisley Town Centre (as defined by the Local Development Plan) there is more than 1,000,000 sq. Ft. of retail/commercial space.</p> <p>The current overall number of ground floor commercial units is 418 with 57 units vacant.</p>	<p>The areas with the highest concentrations of vacant units include New Street (27%), the Paisley Centre (20%), the High Street (18%) and the Piazza Centre (16%).</p> <p>It should be noted that many of the units currently vacant are not in a suitable condition for immediate use.</p>

4. Manufacturing





	Renfrewshire	Scotland	Glasgow City Region
 <p>Number Employed in Manufacturing Sector (2017)</p>	<p>9,000</p> <p>This figure has remained stable on the 2016 figure but is a 12.5% increase on 2015.</p>	<p>182,500</p> <p>Glasgow City has the highest number of manufacturing jobs in the Scotland (18,000) and Orkney the lowest (350).</p>	<p>55,300</p> <p>Glasgow City has the highest number of manufacturing jobs in the GCR (18,000) and East Renfrewshire the lowest (700).</p>
 <p>Number Employed in Manufacturing Sector per 10,000 working age population (2017)</p>	<p>794</p> <p>Renfrewshire has a higher rate of employment in manufacturing than the GCR and Scottish rates. 10.7% of jobs in Renfrewshire are in manufacturing compared to 7.4% in Scotland.</p>	<p>523</p>	<p>461</p>
 <p>Manufacturing as % of total employment (2017)</p>	<p>10.7%</p> <p>This figure is down slightly on the 2016 figure (10.8%) due to a small increase in the size of the overall workforce.</p>	<p>7.4%</p> <p>Moray has the highest proportion of employment in manufacturing in Scotland (17.1%) and Edinburgh City the lowest (2.5%).</p>	<p>9%</p> <p>Renfrewshire has the highest proportion of employment in manufacturing in the GCR (10.7%) and East Ren. the lowest (3.3%).</p>
 <p>% of Scottish Manufacturing GVA (2016)</p>	<p>5%</p> <p>Renfrewshire contributes a higher proportion of Scottish manufacturing GVA than its overall contribution to Scottish GVA (3%).</p>	<p>100%</p> <p>Fife produces the highest proportion of Scottish manufacturing GVA (9%) and Na h-Eileanan Siar the lowest (0.1%).</p>	<p>28%</p> <p>Glasgow City produces the highest proportion of Scottish manufacturing GVA in the GCR (7%) and East Ren. the lowest (0.3%).</p>





 <p>Manufacturing as a % of GVA (2016)</p>	<p>23%</p> <p>Renfrewshire contributes the tenth highest proportion of local GVA through manufacturing in Scotland</p>	<p>15%</p> <p>Moray produces the highest proportion of local GVA through manufacturing (39.4%) and Edinburgh the lowest (4.6%)</p>	<p>15%</p> <p>West Dunbartonshire produces the highest proportion of local GVA through manufacturing in the GCR (39.3%) and Glasgow the lowest (8%)</p>
 <p>Expenditure (£) on R&D within businesses per head of population (2016)</p>	<p>133</p> <p>Renfrewshire has the 8th highest spend per head of population in Scotland</p>	<p>198</p> <p>Aberdeen City has the highest spend per head (£717) and Moray the lowest (£17) of the reported figures</p> <p>Note: 4 councils had figures too low to disclose</p>	<p>138</p> <p>Renfrewshire has the 3rd highest per head expenditure on R&D in the GCR area</p> <p>North Lanarkshire has the highest (£227) in the GCR area and East Dunbartonshire the lowest (£20)</p>
 <p>Manufacturing sector expenditure (£m) on R&D expenditure (2016)</p>	<p>15</p>	<p>592</p> <p>Edinburgh City has the highest spend (£176m) and Moray the lowest (£1m) of the reported figures</p> <p>Note: 10 councils had figures too low to disclose</p>	<p>125</p> <p>Renfrewshire has the third highest expenditure on manufacturing R&D in the GCR area</p> <p>North Lanarkshire has the highest (£62m) in the GCR area and East Dunbartonshire the lowest (£1.5m)</p>
 <p>Manufacturing R&D expenditure as % of total GVA (2016)</p>	<p>65%</p> <p>Renfrewshire spends a higher % of its R&D expenditure on manufacturing than the Scottish and GCR figures</p>	<p>55%</p>	<p>50%</p> <p>North Lanarkshire has the highest % spend on manufacturing R&D in the GCR area (80%)</p>

5. Tourism

	Renfrewshire	Scotland	Glasgow City Region
 <p>Sustainable employment in tourism (at 2016)</p>	5,700	200,900	<p>55,800</p> <p>This accounts for 28% of Scottish sustainable tourism employment</p> <p>Renfrewshire has the fourth highest level of employment (9.5%). Glasgow has the largest with 30,800 (50.6%) and East Renfrewshire the smallest with 1800 (3%)</p>
 <p>Total Visitor Spend (2015-17)</p>	<p>£99.1m</p> <p>This includes the spend for both day and overnight visitors</p> <p>This is an increase of 36% on the figure for 2013-15 (£72.5)</p>		
 <p>Visitors to Events from outside Renfrewshire (2018 projected)</p>	<p>63,000</p> <p>This is an increase of 17% on the baseline figure for 2017 (54,000)</p>		
 <p>All Visits to Attractions (2017)</p>	<p>1.76m</p> <p>This is up from 1.73m visits in 2016</p>		

6. Housing

	Renfrewshire	Scotland	Glasgow City Region
 <p>Workforce lives and works in their Local Authority area (at 2011)</p>	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 LA area with Inverclyde the highest (75%) and East Renfrewshire the lowest (45.2%).
 <p>Supply of New Housing – Rate per 10,000 Population (2017/18)</p>	45.9	32.7 There was a decline in house building in Scotland between 16/17 and 17/18 from 18,539 to 17,580 .	25.6 Renfrewshire has the highest rate of new house building in the Glasgow City Region. South Lanarkshire has the next highest (34.1) and Inverclyde the lowest (13.2).
 <p>Supply of New Housing – Rate per 10,000 Population (average 2013/14 to 2017/18)</p>	36.4	32.4	28.5 Renfrewshire has the 2nd highest rate of new house building in the Glasgow City Region. East Dunbartonshire has the highest (38.5) and North Lanarkshire the lowest (19.7).
 <p>Urban Vacant and Derelict Land (Hectares; 2018)</p>	255	11,037	3,428 This is 31.1% of the Scottish total. Renfrewshire has the 4 th highest total area of vacant and derelict land in GCR (7.4%) with North Lanarkshire the highest with 1,334 hectares (38.9%) and East Renfrewshire the lowest with 52 hectares (0.7%).

 <p>Urban Vacant and Derelict Land as % of all Scottish V&D land (2018)</p>	<p>2.3%</p>	<p>100%</p>	<p>31.1%</p> <p>Renfrewshire has the 3rd highest % of Scottish V&D land in the Glasgow City Region with North Lanarkshire the highest (12.1%) and East Ren. the lowest (0.2%).</p>
 <p>Urban Vacant and Derelict Land as % of total land area (2018)</p>	<p>0.6%</p>	<p>0.1%</p>	<p>1%</p> <p>Renfrewshire has the 4th highest % of its total area classed as urban vacant or derelict with Glasgow City the highest (3.3%) and South Lanarkshire, East Dunbartonshire and East Renfrewshire have the joint lowest (0.2%).</p>
 <p>Breakdown of Tenure Type (2017)</p>	<p>Owner Occupied – 64%</p> <p>Private Rented – 10%</p> <p>Socially Rented – 23%</p>	<p>Owner Occupied – 58%</p> <p>Private Rented – 15%</p> <p>Socially Rented – 24%</p>	<p>Owner Occupied – 56%</p> <p>Private Rented – 14%</p> <p>Socially Rented – 28%</p>
 <p>Effective Land Supply % Brownfield (2018)</p>	<p>88%</p> <p>This figure is from Renfrewshire's Housing Land Audit. It represents the % of the land supply that will produce units in the next 7 years that is classed as brownfield.</p>		