Firth of Clyde
Socio Economic Review

Final Report

for

SSMEI Clyde Pilot

February 2008

EKOS Limited

economic development & regeneration

Registered Office: Glasgow
St George's Studios
93-97 St George's Road
Glasgow, G3 6JA

Tel: 0141 353 1994

Inverness
10 Culduthel Mains Crescent
Inverness
IV2 6RG

Tel: 01463 729294

Registered in Scotland Reg No 145099
email:ekos@ekos.co.uk web: www.ekos-consultants.co.uk

Contents

1. Introduction 1

2. Socio-economic Overview 2

2.1 Introduction 2

2.2 Population 3

2.3 Employment 5

2.4 Business Base 8

2.5 Social Factors 10

2.6 Summary 13

2.7 Implications 16

3. Key Sector Profiles 17

3.1 Introduction 17

3.2 Energy Sector 18

3.3 Fish Farming 26

3.4 Fishing 32

3.5 Construction-related 39

3.6 Defence 46

3.7 Recreation & Tourism 53

3.8 Shipping and Transport 61

3.9 Overall Conclusions 69

4. Settlement Analysis 71

4.1 Introduction 71

4.2 Ardrossan, Saltcoats & Stevenston 72

4.3 Arran 86
4.4 Ayr and Prestwick 100
4.5 Bute 114
4.6 Campbeltown 128
4.8 Clydebank 141
4.9 Dumbarton 155
4.10 Dunoon 167
4.11 Girvan 180
4.12 Gourock 193
4.13 Greenock 206
4.14 Helensburgh 221
4.15 Irvine 234
4.16 Largs 246
4.17 Loch Fyne 260
4.18 Port Glasgow 274
4.19 Troon 286

Appendix 1 Influence Matrices

1. Introduction

The Scottish Sustainable Marine Environment Initiative (SSMEI) was initiated by the (then) Scottish Executive to inform future marine policy and test new management framework options for Scotland's marine and coastal environment.

The SSMEI Clyde Pilot project was one of four pilot projects approved for pilot status across Scotland. The other three pilots are:

- Sound of Mull;
- Shetland; and
- The Berwickshire Coast.

The Firth of Clyde is different from the others in many respects:

- The extent of its area of geographic coverage;
- Number of partner organisations (LAs/ LECs etc);
- Population;
- Number of settlements;
- The level of economic activity.

Based on this, the Firth of Clyde has a much stronger connection to the social and economic dimensions of sustainability and therefore and Marine Spatial Planning is only likely to be successful if it fully addresses these issues. This is fully reflected in the vision set by SSMEI Clyde Pilot who have a future vision of "the Firth of Clyde as a healthy marine and coastal environment, rich in biodiversity and natural resources. This will enhance the quality of life for local communities and contribute to a diverse and sustainable economy for the West of Scotland"

In order to help inform the development of a future strategic plan the SSMEI Clyde Pilot seeks to understand and map out the current socio-economic make up of the Firth of Clyde; the key sectors; coastal communities; and influence the marine environment has on these locations.

This report therefore presents a range of socio-economic analysis of the Firth of Clyde covering:

- a high level socio economic overview;
- a more detailed review of the key marine-related sectors;
- a review of the key coastal settlements; and
- a draft socio economic monitoring framework.

2. Socio-economic Overview

2.1 Introduction

This paper presents a broad socio-economic overview of the littoral strip on the Firth of Clyde.

This strip is defined as every 2003 Census Area Statistic (CAS) ward with a coastal boundary between South Kintyre in Argyll & Bute and South Carrick and Ballantrae in South Ayrshire. It is also defined using frozen 1991 wards.[1].

The strip is then divided and examined in two parts. The dividing line is at the Erskine Bridge with all wards west of the bridge considered as the Outer Firth and all wards east of the bridge as far as Glasgow Green referred to as the Inner Firth.

This is to allow the more rural and or maritime wards to be seen in isolation from the more populous industrial and urban areas of the Glasgow conurbation.

This overview will look at:

- Population;
- Employment;
- Business base; and
- social factors.

Scotland is used as comparator geography.

[1] This allows comparison between 2000 and 2005 data. However there are inevitable discontinuities in these geographies and a like for like comparison between the areas is not possible. Changes should be seen as indicative rather than absolute.

2.2 Population

Table 2.1: Scotland Population by Age Group

	Children		Working Age (59/64)		Retired		All People
2001							
People	927065	18%	3147964	62%	941982	19%	5062011
Males	498249	20%	1608884	66%	325361	13%	2432494
Females	473816	18%	1539080	59%	616621	23%	2629417
1991 People	1010320	20%	3079761	62%	908486	18%	4998567

Source: 2001 Census; 1991 Census

- Scotland's population grew slightly by 1.3% (63,000)
- The working age population remained stable at 62% of the total
- The proportion of children fell slightly
- The proportion of retired people grew slightly.

Table 2.3 reports populations for the Outer Firth area.

Table 2.2: Outer Firth Population by Age Group

	Children		Working Age (59/64)		Retired		All people
2001							
People	51353	18%	169100	60%	61254	22%	281707
Males	26268	19%	87903	65%	21025	16%	135196
Females	25085	17%	81197	55%	40229	27%	146511
1991 People	50036	20%	149894	59%	52502	21%	252432

Source: 2001 Census; 1991 Census

- The outer firth population grew significantly by 11.6% (29,000);
- The working age population increased slightly as a proportion of the total population;
- The proportion of children fell by 2%;
- The proportion of retired people grew;
- The outer Firth is home to 73% of the Firth's population and 6% of Scotland's;
- Population growth is above the trend for Scotland. The trend in the number of children and retired people is similar to Scotland and suggests that the working age population is itself ageing.

Table 2.3: Inner Firth Population by Age Group

	Children		Working Age (59/64)		Retired		All people
				2001			
People	16264	15%	71817	68%	17519	17%	105600
Males	8349	16%	36971	72%	5756	11%	51076
Females	7915	15%	34846	64%	11763	22%	54524
1991 People	24404	18%	84988	63%	25548	19%	134940

Source: 2001 Census; 1991 Census

- The inner firth population fell steeply by 22% (29,000);
- The working age population increased as a proportion of the total population;
- The proportion of children fell by 3%;
- The proportion of retired people fell by 2%;
- The inner Firth contains 27% of the Firth's population and 2% of Scotland's;
- Population decline is counter to Scotland and its components would appear to be different. The working age population grew as a proportion of all residents while the proportion of children and retired people fell.

Table 2.4: Firth of Clyde Population by Age Group

	Children		Working Age (59/64)		Retired		All people
				2001			
People	67617	17%	240917	62%	78773	20%	387307
Males	34617	19%	124874	67%	26781	14%	186272
Females	33000	16%	116043	58%	51992	26%	201035
1991 People	74440	19%	234882	61%	78050	19%	387372

Source: 2001 Census; 1991 Census

- The total Firth of Clyde population has remained stable at 387,300;
- The working age population has increased slightly as a proportion of total population;
- The proportion of children has fallen by 2%;
- The proportion of retired people increased by 1%;
- 27% of the Firth of Clyde population live in inner ward and 73% in outer wards;

- The Firth of Clyde is home to almost 8% of Scotland's population;
- Overall population change is very similar to that experienced by Scotland although clearly there are contrasting dynamics at work in the inner and outer firth.

2.3 Employment

Table 2.5 shows employee numbers by broad industrial group in 2005.

Table 2.5: Employment by Broad Industrial Group, 2005

	Inner Firth		Outer Firth		Firth of Clyde		Scotland	
	No.	%	No.	%	No.	%	No.	%
Agriculture & Fishing	47	0.0	777	0.7	824	0.2	35,702	0.2
Energy & Water	943	0.4	872	0.8	1,815	0.5	36,939	0.6
Manufacturing	13,349	5.9	9,899	8.9	23,248	6.9	229,728	9.3
Construction	6,466	2.9	4,484	4.1	10,950	3.3	131,757	5.5
Distribution; hotels & restaurants	42,694	19.0	30,236	27.3	72,930	21.7	543,579	22.4
Transport & Communications	13,729	6.1	7,400	6.7	21,129	6.3	129,320	6.3
Banking, Finance & Insurance	79,938	35.6	16,857	15.2	96,795	28.9	438,870	19.7
Public Administration	58,024	25.8	33,406	30.2	91,430	27.3	725,804	30.8
Other Services	9,436	4.2	6,760	6.1	16,196	4.8	127,094	5.1
All employees	224,626	100	110,691	100	335,317	100.0	2,398,793	100

Source: ABI

The Table shows that the main employment groups at each level are:

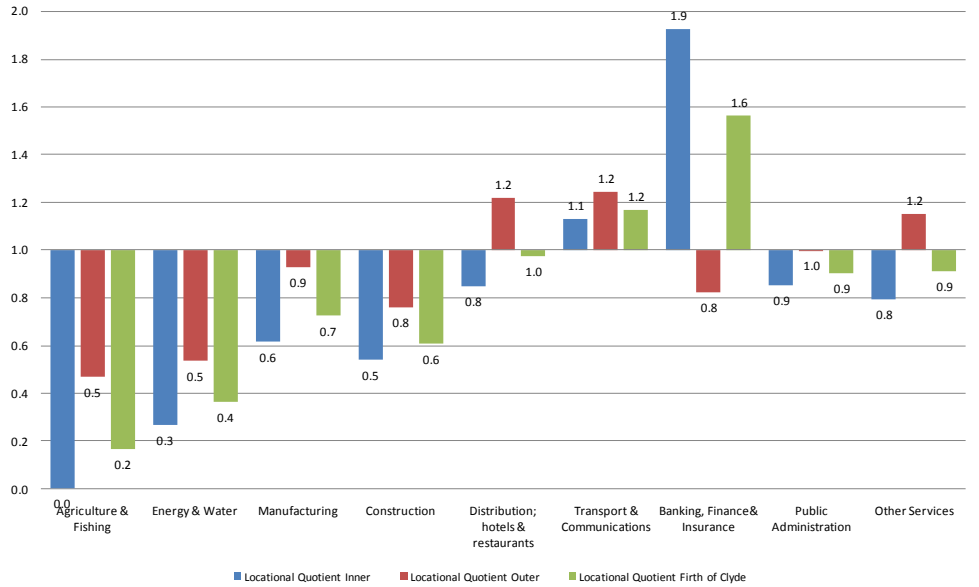
- Scotland:
  - Public admin (31%);
  - Distribution /hotels (22%)
  - Banking & Finance[2] (20%)
- Firth of Clyde
  - Banking & Finance (29%)
  - Public admin (27%)
  - Distribution / hotels (22%)
- Outer Firth
  - Public admin (30%)
  - Distribution / hotels (27%)
  - Banking & Finance (15%)

[2] Although Financial Services is a major component part of this Group is does in fact include a much wider range of professional and business services: from legal practices to secretarial and translation services to industrial cleaning and security to give but a few examples.

- Inner Firth
  - Banking & Finance (36%)
  - Public admin (26%)
  - Distribution / hotels (19%)

Figure 1 depicts the Locational Quotient (LQ)[3] for the Firth of Clyde areas and Scotland. The closer the bar is to "1" the less difference there is in the relative importance of the sector in each area.

Figure 1: Locational Quotient Firth of Clyde areas with Scotland



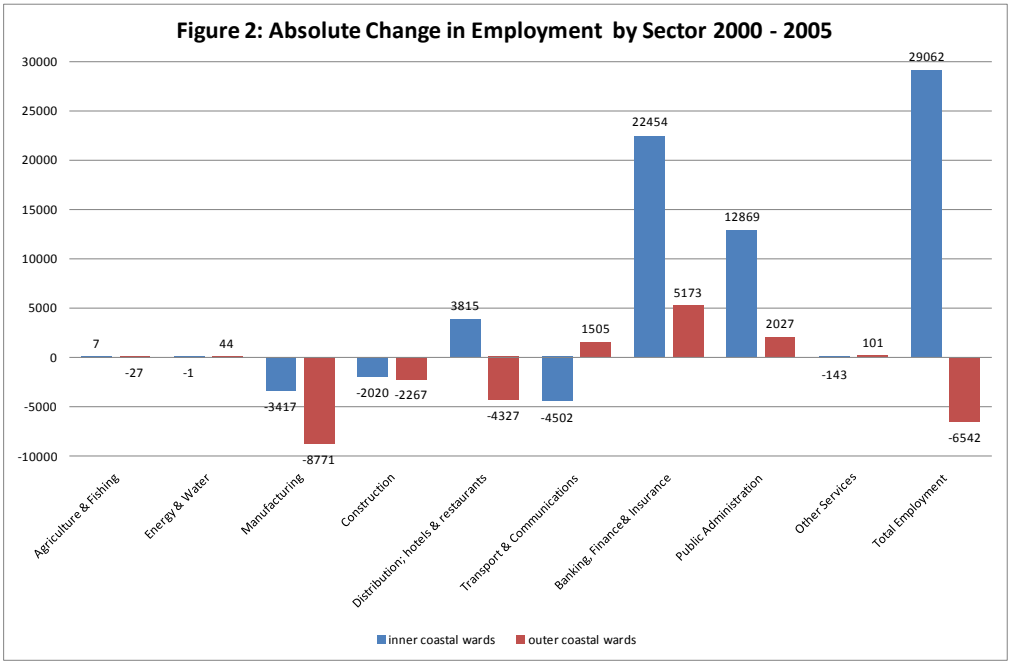
Source: ABI

The figure shows:

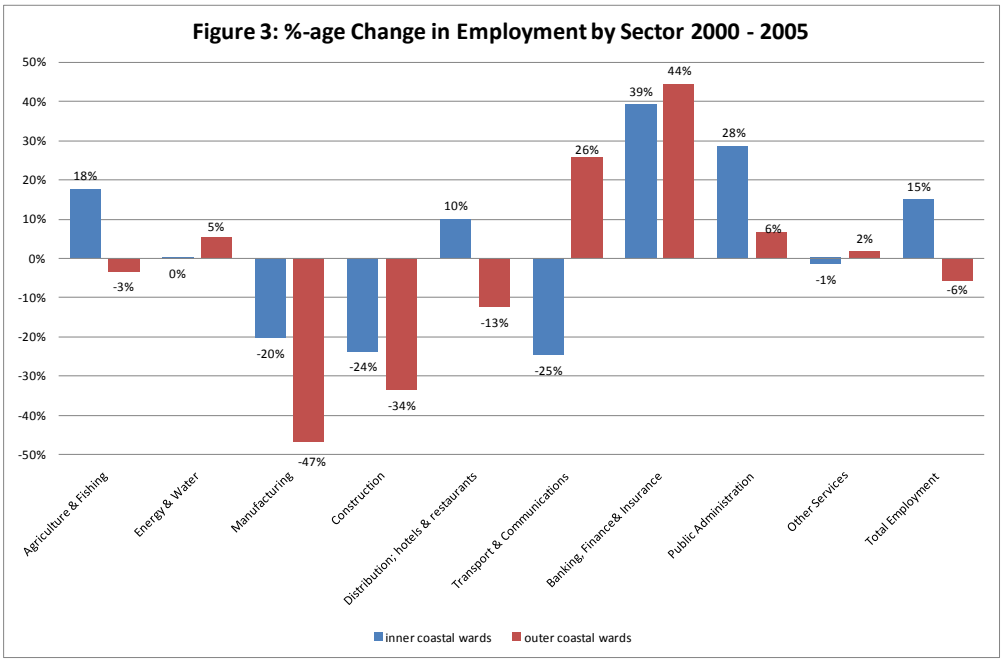
- Agriculture & fishing are considerably less important in the firth than to Scotland as a whole;
- Energy, manufacturing and construction are also less important in the firth but not as significantly so. In absolute terms only agriculture, fisheries and energy are not important with less than 1000 employees between them; and
- Banking, finance and insurance is a much more important employer to the inner firth than to Scotland, reflecting the presence of the financial services sector in Glasgow city centre and Clydebank. With exception of the primary sector, all other sectors are close to the Scottish level.

[3] LQ is a means of comparing the relative importance of an industry in one area with another. An LQ of more than 1 indicates the industry is more important to the local area and an LQ of less than 1 indicates it is of less importance.

Figures 2&3 show the absolute and %-age change in employment across the Firth of Clyde from 2000 -2005.



Source: ABI



Source: ABI

The figures show that:

- Overall employment change in the Firth of Clyde (7%) is close to Scotland (7%) but that this is driven by strong growth in the inner wards compensating for overall decline in the outer firth;
- The outer firth shows the largest %-age gain in banking, finance & insurance and the largest fall in manufacturing but the absolute change is small;
- Employment growth at all levels is concentrated in banking and public administration;
- The main employment losses are in manufacturing.

2.4 Business Base

Table 2.6 shows the business / workplace base in 2005.

Table 2.6: Employment by Broad Industrial Group, 2005

	Inner Firth		Outer Firth		Firth of Clyde		Scotland	
	No.	%	No.	%	No.	%	No.	%
Agriculture & Fishing	13	0.1	213	2.3	226	1.2	3,466	2.0
Energy & Water	17	0.2	42	0.4	59	0.3	848	0.5
Manufacturing	471	4.7	463	4.9	934	4.8	10,127	5.9
Construction	355	3.5	669	7.1	1,024	5.2	15,029	8.7
Distribution; hotels & restaurants	3,160	31.4	3,562	37.7	6,722	34.4	54,230	31.5
Transport & Communications	328	3.3	386	4.1	714	3.7	7,777	4.5
Banking, Finance & Insurance	3,877	38.5	1,891	20.0	5,768	29.5	44,198	25.7
Public Administration	938	9.3	1,286	13.6	2,224	11.4	21,263	12.4
Other Services	920	9.1	945	10.0	1,865	9.5	15,214	8.8
All employees	**10,079**	**100.0**	**9,457**	**100.0**	19,536	100.0	172,152	100

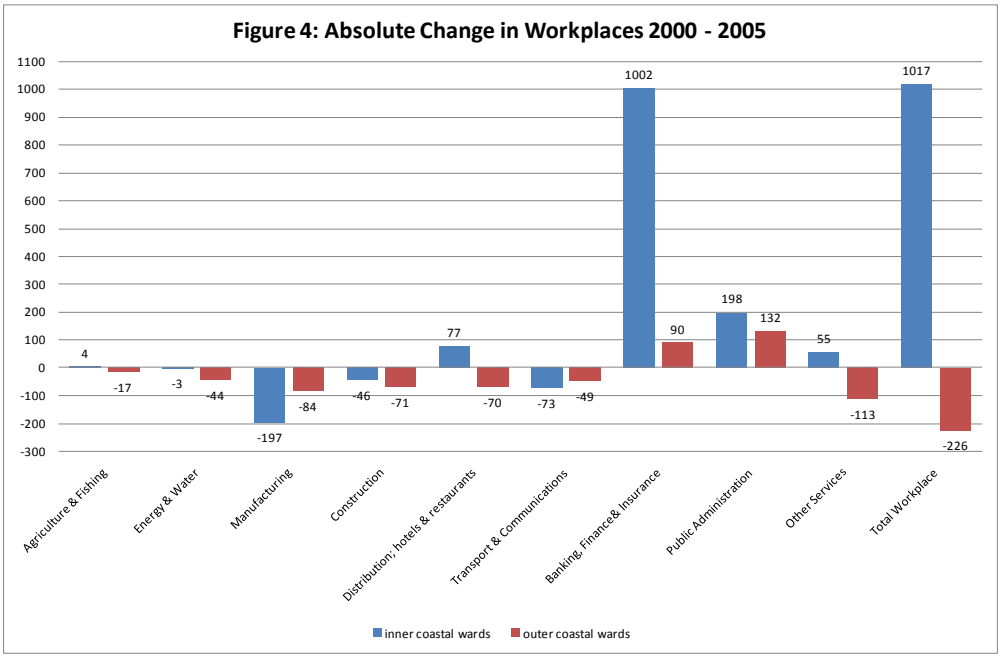
Source: ABI

The Table shows that

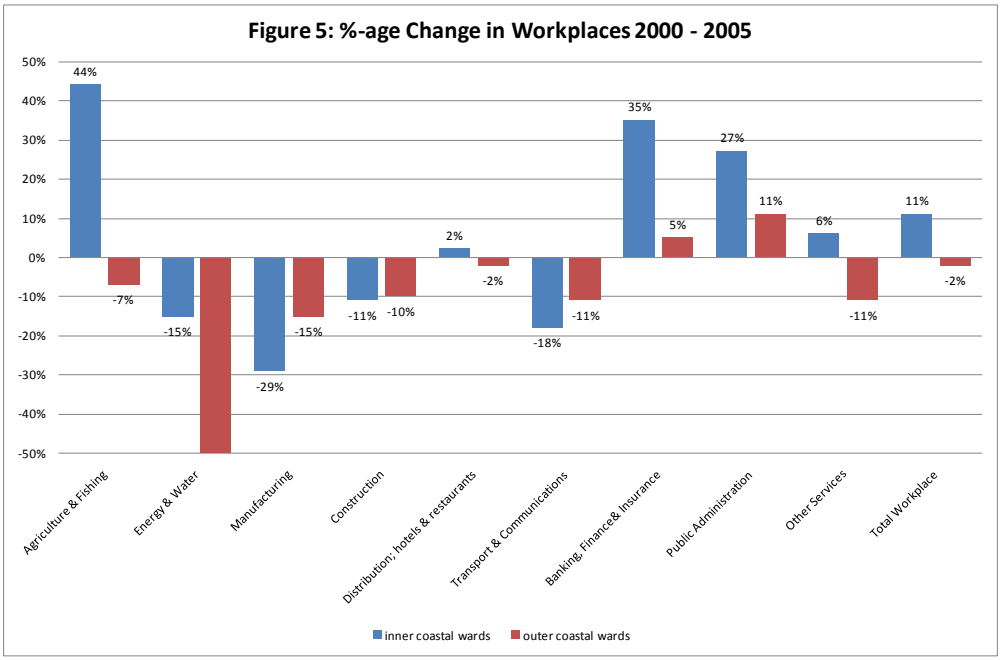
- For Scotland, Firth of Clyde and the outer firth area the largest business sectors are in descending order:
  - Distribution; hotels & restaurants
  - Banking, finance & insurance;
  - Public administration
- For the inner firth area the order is slightly different:
  - Banking, finance & insurance
  - Distribution; hotels and restaurants

- Public administration (only just ahead of other services)

Figures 4&5 show the absolute and %-age change in the business/workplace base across the Firth of Clyde from 2000 -2005.



Source: ABI



Source: ABI

The Figures show:

- The overall %-age change in workplace is the same for Scotland and Firth of Clyde (4%);
- The outer firth records a small decline while the inner wards show an 11% increase;
- The main growth is in banking & finance with the inner firth outperforming Scotland. The outer firth wards record much lower growth;
- The largest absolute decline in the Firth area is in manufacturing, again driven by change in the inner wards;
- The largest %-age change is in energy & water, which fall by half, but the absolute numbers are small.

2.5 Social Factors

Unemployment

Table 2.7 reports the change in numbers of claimant count unemployed in the Firth of Clyde area and Scotland from September 2005 – September 2007.

Table 2.7: Absolute Change in Unemployment September 2004 - 2007

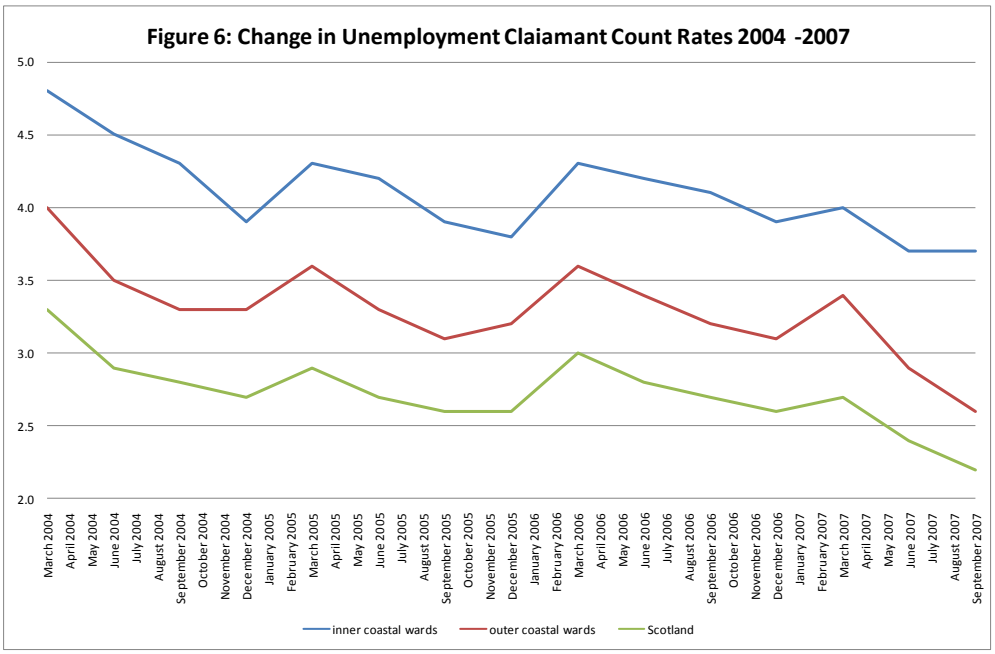
Date	inner coastal wards	outer coastal wards	Firth of Clyde	Scotland
2004	3,153	4,903	8,056	88,401
2005	2,863	4,607	7,470	83,782
2006	3,004	4,726	7,730	85,861
2007	2,676	3,841	6,517	71,504
Change	-477	-1,062	-1,539	-16,897
%change	-15%	-22%	-19%	-19%

Source: Claimant Count

The Table shows:

- Substantial absolute decreases in the claimant count across all areas;
- The outer firth area records the biggest fall;
- The inner firth area records the lowest fall;
- As a whole the Firth of Clyde performs as well as Scotland.

Figure 6 depicts the change in unemployment claimant rates for both Firth areas and Scotland.



Source: Claimant Count

The Figure shows that:

- Outer firth rates are loser to the Scottish average and the gap has closed to around half a %-point in 2007;
- Inner firth rates follow the same downward trend as Scotland but remain consistently higher than this average. In the last year the gap between the two had narrowed but opened up again in September to the same 1.5%-points it was in 2004..

SIMD

The Scottish Index of Multiple Deprivation 2006 (SIMD) ranks the relative deprivation of all 6505 datazones in Scotland It uses a variety of indicators across seven domains to arrive at an overall index of deprivation. An examination of the most deprived quintile (or most deprived 1301 datazones) on the SIMD website[4] is reported in Table 2.8.

Table 2.8: Firth of Clyde Datazones in Most Deprived Quintile, SIMD 2006

	Inner Firth		Outer Firth		Firth of Clyde	
	No.	%	No.	%	No.	%
SIMD 2006	76	6	63	5	139	11
Health Domain	75	6	63	5	138	11

Source: SIMD 2006.
Note: % is of Scotland.

The Table suggests that:

- Overall deprivation and health deprivation are closely linked;

[4] http://www.scotland.gov.uk/Topics/Statistics/SIMD/map.asp

- Deprivation in the inner firth area is more concentrated than expected from its population share (55% of deprived wards and 27% of the firth's population). The outer firth has 13% of the region's population but only 5% of the most deprived zones;

- More than one in ten of the most deprived zones in Scotland are located on or close to the Clyde coast.

QUALIFICATIONS

The 2001 Census provides details of the highest level of qualification[5] held by the population aged 16-74 years on Census Day. Table 2.9 reports.

Table 2.9: Highest Level of Qualification Held (all aged 16-74 years)

	No or Other	Group 1	Group 2	Group 3	Group 4
Inner Firth	27692	16377	13803	5980	18447
Outer Firth	67421	49158	33137	15878	40264
Firth Of Clyde	95113	65535	46940	21858	58711
Scotland	1239947	921074	584060	259389	726609

Source: 2001 Census

Figure 7 shows the %-age distribution of qualifications across the respective populations.

The data suggest that:

- The Firth population is better qualified than the Scottish norm;

- Both inner and outer areas show the same or greater proportion with no qualifications and a greater percentage with Group 4 qualifications;

- The inner and outer firth show a smaller proportion holding Group 1 qualifications;

- The inner firth shows a larger proportion holding Group 2 and Group 4 qualifications than Scotland.

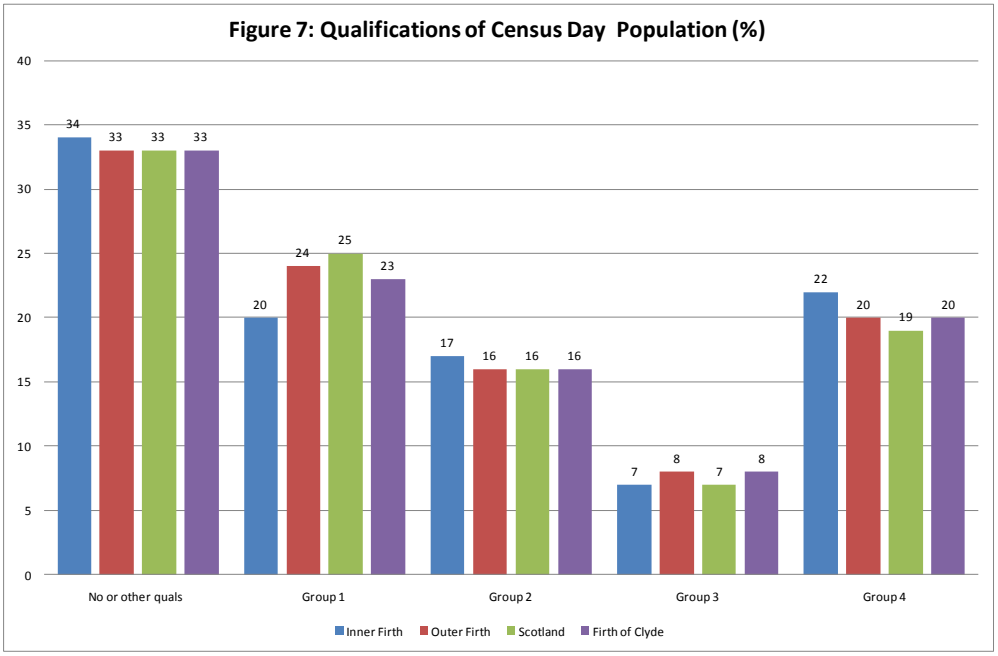
[5] Highest level of Qualification is defined as:

Group 1: 'O' Grade, Standard Grade, Intermediate 1, Intermediate 2, City and Guilds Craft, SVQ level 1 or 2, or equivalent.

Group 2: Higher Grade, CSYS, ONC, OND, City and Guilds Advanced Craft, RSA Advanced Diploma, SVQ level 3 or equivalent.

Group 3: HND, HNC, RSA Higher Diploma, SVQ level 4 or 5, or equivalent.

Group 4: First degree, Higher degree, Professional Qualification.



Source: 2001 Census

2.6 Summary & Conclusions

The data presented above suggest that in many ways the socio-economic profile of Firth of Clyde is similar to that of Scotland, but within the littoral strip there are contrasting trends and dynamics that are masked by looking at the coastal wards as a whole.

The main points are:

- Population. The total population remained stable while Scotland recorded a slight increase between 1991 -2001. However, within this there was an absolute fall in the inner firth population which cancelled out a similar absolute increase in the outer firth. Both areas, but particularly the inner firth, saw an increase in the proportion of the population of working age. Both saw a fall in the proportion of children and a rise in the proportion of retired people. The population in both areas has therefore aged broadly in line with the Scottish change.

  Employment. The main employment sectors for the Firth of Clyde and its sub-areas are the same as for Scotland, albeit that the order and percentage shares do change. Examination of the LQ shows that the relative importance or level of dependency for each broad industrial group is the same for the Firth as for the region. The exception is in Banking and finance, presumably due to the concentration of such employment in Glasgow and parts of Clydebank.

Agriculture and fishing does show as much more significant in the outer firth and this is reflected to a lesser degree for the firth as a whole.[6]

The structure of employment in the Firth of Clyde economy is therefore broadly similar to that of Scotland and subject to the same general trends. The decline of manufacturing, for example, is a well established feature of the UK and Scottish economies. Over the period 2000-2005 the Firth area has actually taken a bigger hit than Scotland, losing a third as opposed to a quarter of such employment. The result of this is that the Firth is now less reliant on manufacturing employment than Scotland. Instead the focus of employment has moved to growth sectors of financial and business services encompassed in the Banking, Finance & Insurance Broad Industrial Group. The Locational Quotient shown in Figure 1, above, shows that, despite the faster employment growth rate, the outer firth is a little below the national level of reliance on employment in the Banking Broad Industrial Group (business and financial services). Importantly, this is not balanced by over-reliance on employment in the declining manufacturing and primary sectors but on other areas of the broadly defined service sector, areas of increasing importance to the national economy.

Employment change for the Firth from 2000 – 2005 is close to that for Scotland but strong growth in the inner wards compensate for decline in the outer. Growth for all areas is concentrated in banking and finance and public administration. The presence of the International Financial Services District (IFSD) in Glasgow city centre waterfront is no doubt a key factor in employment growth in the inner firth area, and to a lesser extent in Scotland, where Edinburgh is still the largest centre. However, the outer firth does show the largest %-age change in Banking Group, albeit from a low base. This suggests that the growth of the financial and business services sector does not stop at the Erskine Bridge.

The main employment losses are in manufacturing.

- Business Base. The Firth of Clyde, the outer firth area and Scotland show Distribution; hotels, banking and public administration as the main business types. In the inner firth banking and distribution swap places in order of importance. The importance and predominance (38%) of distribution and hotels in the outer firth is not surprising (this sector has the closest association with tourism activity, broadly defined). Banking and finance has an even larger percentage of inner firth business activity (39%). However, this broad sector does not relate solely to financial services but encompasses a range of business and business service activity too.

[6] The importance of agriculture and fishing to the local economies is likely to be underestimated. ABI data is an estimate of *employees in employment* and so the high levels of self-employment associated with some aspects of primary industries will not be picked up.

Business base change is the same overall for the Firth of Clyde as for Scotland, but again there is growth in inner wards and decline in outer. As for employment the main growth is in banking and finance and the main decline in manufacturing. An interesting point is that while the overall change in workplaces is only marginally below the total change in employment for both the Firth and Scotland, this is not a uniform pattern. In the Banking, Finance & Insurance Group, for example, employment growth for the Firth is recorded as 40% for the period 2000-05 while workplace growth is barely half that at 23%. The difference is even more marked for outer firth areas alone. The inference is that, in some sectors at least, the average size of the typical workplace or business along the Clyde littoral is growing.

- Unemployment. The claimant count has fallen significantly in each area with the absolute %-age change for the Firth the same as for Scotland. In this case it is the relatively poorer performance of the inner firth that brings performance back in line with the national average as the outer wards show a fall of more than a fifth in unemployment claimants. While showing the same downward trend, unemployment rates in the inner Firth of Clyde have remained stubbornly above the Scottish level and in the last year the gap has widened. The problems of deprivation and disadvantage in the Glasgow conurbation are no doubt a factor in this.

- Social Factors. SIMD data suggests that health deprivation is a key factor in overall deprivation along the Firth of Clyde. Deprivation is also concentrated in the inner firth disproportionately to its population. Again, this is likely a function of the urban environment and associated problems of Glasgow and Clydebank.

  More positively, Census data suggests both areas of the Firth enjoy slightly better qualifications than the Scottish average, with fewer reporting no or Group 1 qualifications and more recording a degree or professional level accreditation.

2.7 Implications

This brief socio-economic review suggests the following implications for future planning:

- Population shift from inner conurbation to outer, less developed areas. This drift is counter to trends in employment growth. The population is also ageing.
  - How will this be affected by Clyde Waterfront redevelopment?
  - Are there implications for transport planning assumptions?
  - Are there healthcare and social services issues to consider?
- Outer firth more dependent on manufacturing and primary sector for employment than the inner reaches. Under represented in growth sectors of business and financial services in employment and business base. Business base in other sectors is shrinking.
- Aggregate employment levels across the Firth are growing in line with national trend. The structural changes are also very similar. The reasons why individuals (and employers) are attracted to the waterfront have changed from the practicalities associated with raw material and product logistics to more intangible aspects associated with the Human Resource. There are therefore likely to be property and infrastructure implications of this shift?
- Unemployment is falling in both parts of the Firth. The change is much greater in the outer firth than the inner. Although the data are not contemporaneous, does it suggest people are living by the sea but travelling into the city to work?
- Deprivation appears concentrated along the inner firth. Should tackling this be a priority over investment in the outer coast? Would this also redress the population shift away from the city?
- Qualifications are better than the regional norm, offering scope for higher paid and better quality employment for residents. Are residents of the outer areas already taking advantage of this?

3. Key Sector Profiles

3.1 Introduction

This chapter presents a more detailed review of the key sectors operating within the marine environment in the Firth of Clyde.

It covers:

- energy
- fish farming
- fishing
- construction
- defence
- tourism and recreation
- shipping and transport.

These are now described in more detail below and activity is reported for Inner and Outer Firth of Clyde.

This profile will look at:

- employment;
- business base;
- turnover; and
- GVA.

The 12 UA making up the West of Scotland region[7] are used as comparator geography.

[7] Argyll & Bute, West Dunbartonshire, East Dunbartonshire, North Lanarkshire, South Lanarkshire, Glasgow City, East Renfrewshire, Renfrewshire, Inverclyde, North Ayrshire, East Ayrshire and South Ayrshire.

3.2 Energy Sector

3.2.1 Introduction

This paper presents a profile of the Energy industry in the littoral strip on the Firth of Clyde.

This industry is defined as a sub-sector of the broadly defined energy activity reported on in the socio-economic overview. Energy is defined as the following 2003 SIC codes:

- 1110: Extraction: crude petroleum/natural gas;
- 1120: Service activities:oil & gas extraction;
- 2921: Manufacture of furnaces/furnace burners;
- 4010: Production/distribution of electricity;
- 311: Manuf: electric motors/generators etc; and
- 312: Manuf: electricity distrib. Apparatus.

3.2.2 Employment

Table 3.1 reports Energy employment in 2005 by gender, area and sub-sector.

The Table shows that:

- 1,735 people are employed in this sector in the Firth of Clyde area;
- 54% are in the inner firth and 46% in the outer;
- 83% of the sector's employees are male; and
- 5% of Scotland's employees in this sector are found in Firth of Clyde wards.

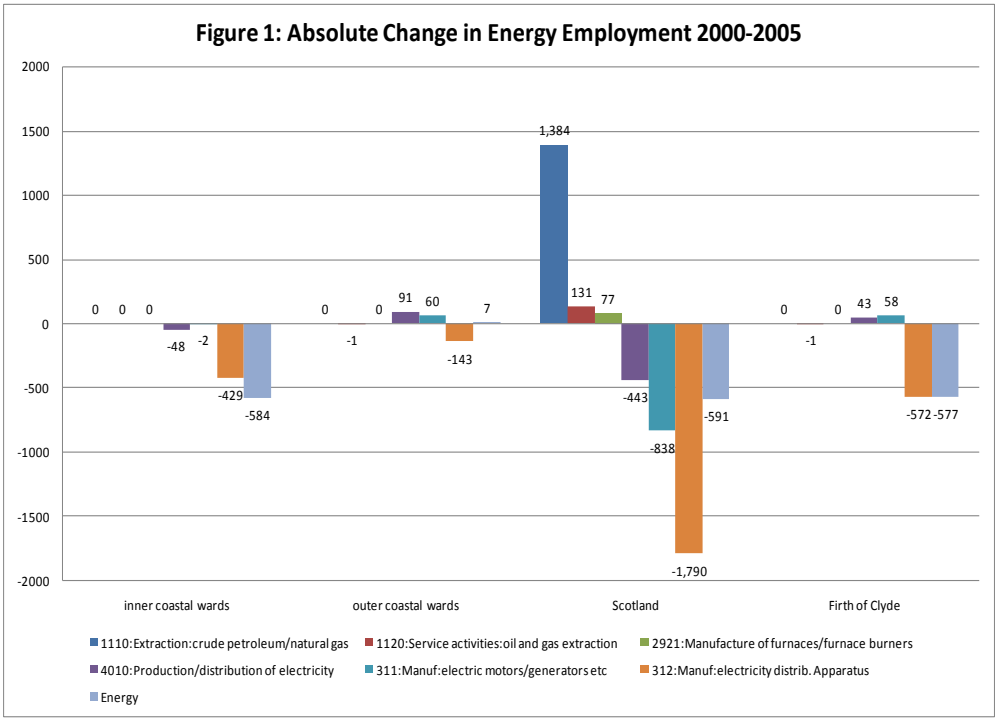
Table 3.1:Energy Employment by Gender and Area, 2005

	Inner	Outer	Scotland
Male			
Energy	764	680	29,682
Extraction: crude petroleum/natural gas	0	0	7,111
Service activities:oil & gas extraction	0	1	10,874
Manufacture of furnaces/furnace burners	0	0	260
Production/distribution of electricity	573	563	6,444
Manuf: electric motors/generators	6	48	864
Manuf: electricity distrib. Apparatus	176	69	1,611
Female			
Energy	180	110	6,167
Extraction: crude petroleum/natural gas	0	0	1,746
Service activities:oil & gas extraction	0	0	1,413
Manufacture of furnaces/furnace burners	0	0	58
Production/distribution of electricity	135	72	1,807
Manuf: electric motors/generators	2	26	345
Manuf: electricity distrib. Apparatus	42	12	465
Total			
Energy	945	790	35,849
Extraction: crude petroleum/natural gas	0	0	8,858
Service activities:oil & gas extraction	0	1	12,288
Manufacture of furnaces/furnace burners	0	0	318
Production/distribution of electricity	708	634	8,251
Manuf: electric motors/generators	8	74	1,209
Manuf: electricity distrib. Apparatus	219	81	2,076

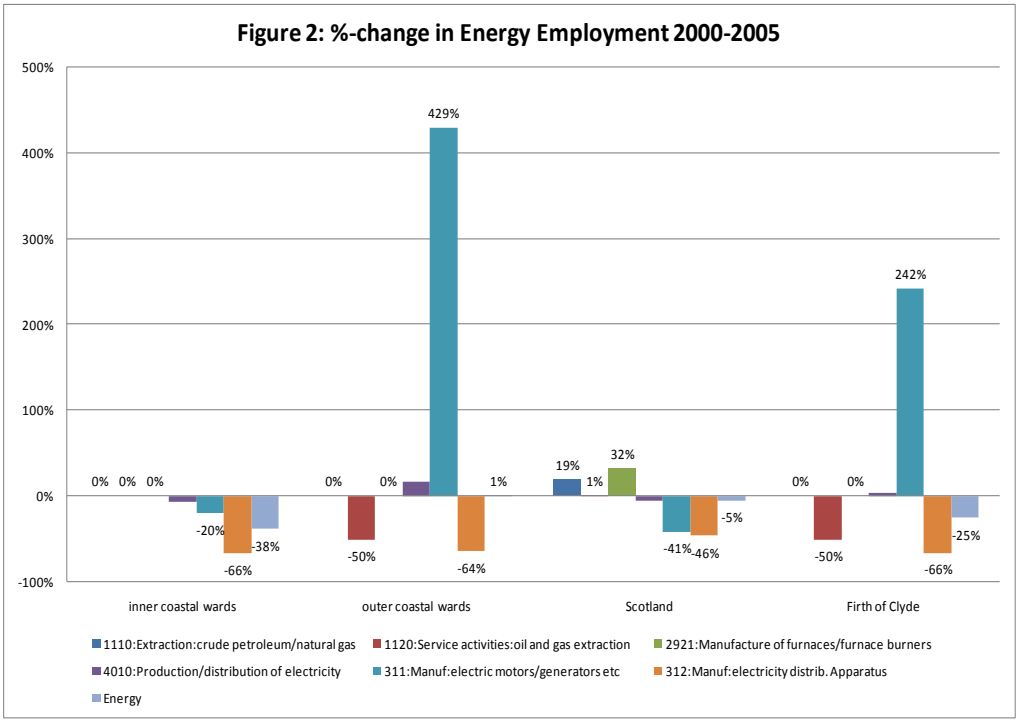
Source: ABI

Figures 3.1 & 3.2, over, depict the %-age and absolute change in Energy employment from 2000-2005. They show that:

- The sector has suffered a greater decline in Scotland than in the coastal Firth;
- Absolute decline has been greatest in Scotland; and
- %-age change in manufacture of electrics motors/generators etc employment appears significant in the outer wards and Firth of Clyde but is small in absolute terms.



Source: ABI



Source: ABI

3.2.3 Workplaces / Business Base

Table 3.2 reports Energy workplaces[8] by area for 2005.

Table 3.2: Energy Workplaces, 2005

	Inner	Outer	Scotland
Energy	16	15	546
Extraction: crude petroleum/natural gas	0	0	51
Service activities:oil & gas extraction	0	1	188
Manufacture of furnaces/furnace burners	2	0	9
Production/distribution of electricity	8	10	127
Manuf: electric motors/generators etc	1	3	59
Manuf: electricity distrib. Apparatus	5	1	65

Source: ABI

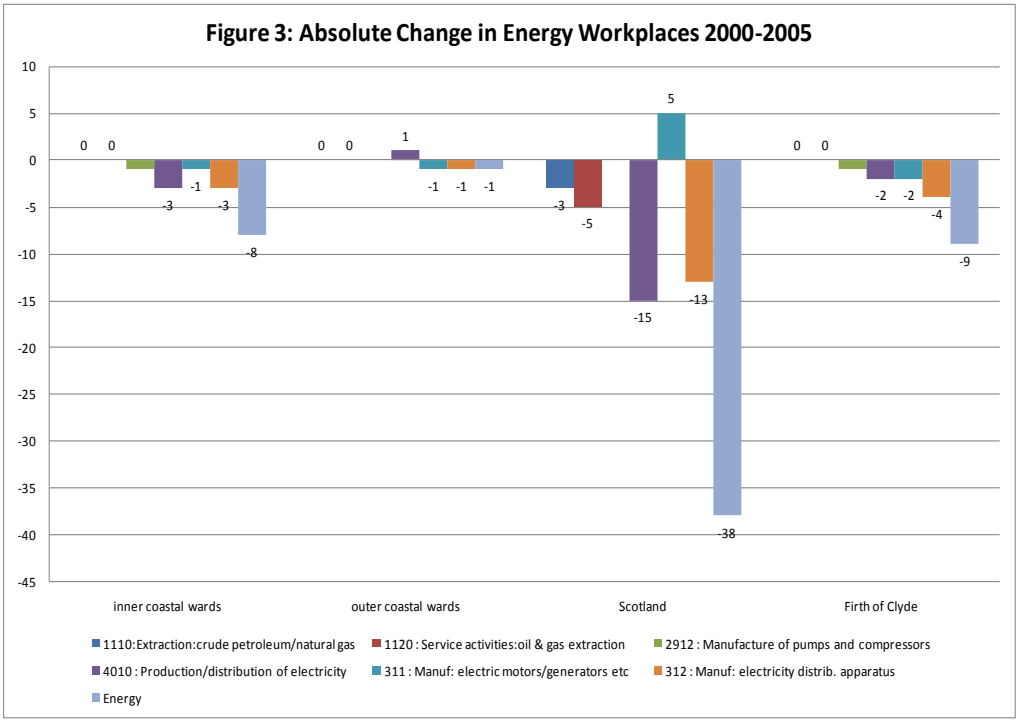
The analysis shows that:

- 31 energy workplaces are found on the Firth;
- 52% are located in the inner firth and 48% in the outer;
- Only 1 business is engaged in service activities involving oil and gas extraction; and
- 6% of Scotland's marine energy workplaces are found on the Firth coast.

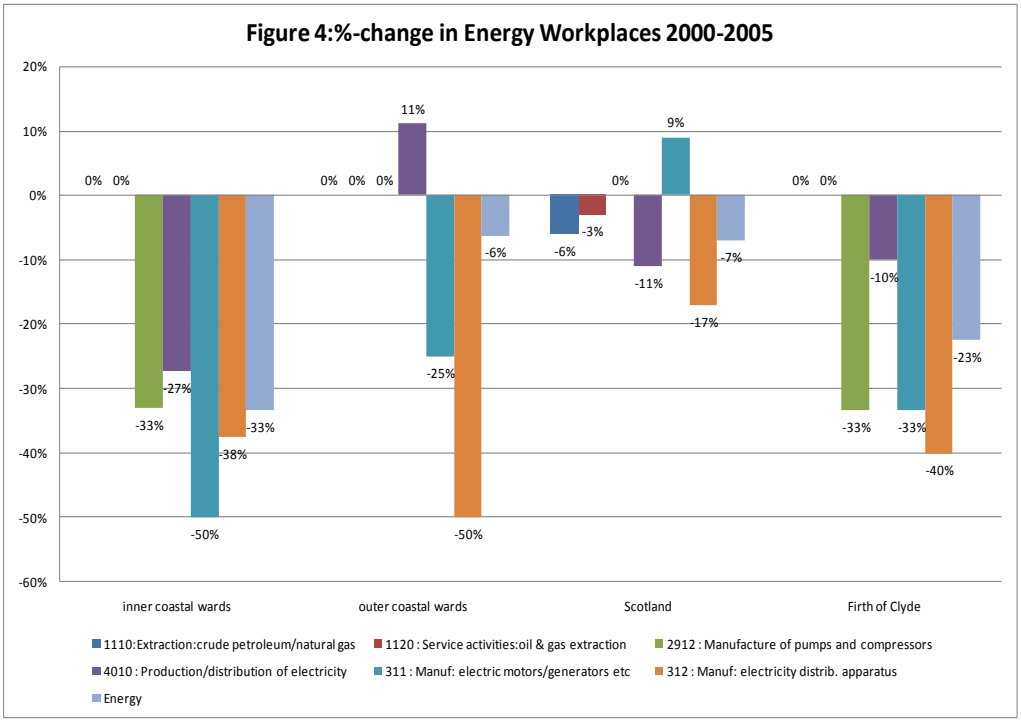
Figures 3&4, over, show the absolute and %-age change in Energy workplaces from 2000 – 2005. They show that:

- The number of workplaces has fallen more in Scotland than on the Firth of Clyde coast;
- The absolute loss is greater in inner wards than outer wards but the change is small in both areas; and
- %-age change in the service activities involving oil and gas is the only one to show growth.

[8] ABI workplaces are generally accepted as a proxy for the business base of an area.



Source: ABI



Source: ABI

3.2.4 Turnover

Table 3.3 reports change in turnover by sector, sub-sector and area 2000 – 2005. Calculations are based on turnover per employee[9] of:

£137,300 in 2000; and

- £149,700 in 2005.

Table 3.3: Turnover (£m)

	Inner		Outer		Scotland	
	2000	2005	2000	2005	2000	2005
Energy	209.9	141.5	107.5	118.3	5196.4	5366.6
Extraction: crude petroleum/natural gas	0	0	0	0	1026.2	1326.0
Service activities: oil & gas extraction	0	0	0.3	0.15	1669.2	1839.5
Manufacture of furnaces/furnace burners	0	0	0	0	33.1	47.6
Production/distribution of electricity	103.8	106.0	74.6	94.9	1193.7	1235.2
Manuf: electric motors/generators etc	1.4	1.2	1.9	11.1	281.1	181.0
Manuf: electricity distrib. Apparatus	88.9	32.8	30.8	12.1	530.8	310.8

Source: Scottish Annual Business Statistics

The Table[10] shows that:

- Energy on the Firth of Clyde Coast totalled £259.8m in 2005;
- This is 5% of sector turnover in Scotland; and
- Turnover in the Firth area is down £57.6m on 2000 despite an increase in turnover per employee.

3.2.5 GVA

Table 3.4 reports change in GVA by sector, sub-sector and area 2000 – 2005. Calculations are based on GVA per employee[3] of:

- £37,800 in 2000; and
- £49,600 in 2005.

[9] The Scottish Government publish annual statistics on the financial performance of

Table 3.4: GVA (£M)

	Inner		Outer		Scotland	
	2000	2005	2000	2005	2000	2005
Energy	57.8	46.9	29.6	39.2	1430.6	1778.1
Extraction: crude petroleum/natural gas	0	0	0	0	282.5	439.4
Service activities:oil & gas extraction	0	0	0.07	0.05	459.5	609.5
Manufacture of furnaces/furnace burners	0	0	0	0	9.1	15.8
Production/distribution of electricity	28.6	35.1	20.5	31.4	328.6	409.2
Manuf: electric motors/generators etc	0.4	0.4	0.53	3.7	77.4	60.0
Manuf: electricity distrib. Apparatus	24.5	10.9	8.5	4.0	146.1	103.0

Source: Scottish Annual Business Statistics

The Table shows that:

- Energy on the Firth of Clyde Coast GVA totalled £86.1m in 2005;
- This is 5% of sector GVA in Scotland; and
- GVA in the Firth area is down £1.3m on 2000 despite an increase in productivity per employee.

3.2.6 Sector Review

Marine energy generation relates to tidal and wave power. Both are distinct form of power generation but share a requirement for offshore and onshore installations. Offshore wind farms are another potential means of power generation. Some of the main issues and concerns facing the sector in Scotland are:

- Scotland is presently a world leader in the development and testing of this technology (European Marine Energy Centre in Orkney and companies like Ocean Power Delivery);
- Other countries, such as Portugal, are now developing technology at a faster rate than Scotland/UK that there is a danger of surrendering this lead (and its potential benefits) in the same way as wind power was surrendered to Denmark;

- FREDS MEG[11] proposes that by 2020 10% of Scotland's energy needs or 1300MW per year should come from marine sources and this could increase by 100MW per year thereafter;

- 7000 direct jobs could be supported and Scottish companies could be supplying major international export markets;

- A lack of capacity in the transmission and distribution network is a constraint to successful development. In part this is due to the ageing nature of the Grid, designed for different conditions in a different age. In part it is due to the planning and regulatory systems;

- The operation of renewable energy projects is expected to require qualifications at skilled craft level and above. The construction phase of these projects may present entry level post for the semi-skilled;

- There is potential opportunity for skills transfer from declining industries such as offshore O&G, fishing;

3.2.7 Conclusions

The following conclusions can be drawn from this profile:

- Energy is not a major employer in the Firth of Clyde, accounting for less than 1% of employment in the outer firth and less than half of 1% in the inner wards;

- Oil and gas activity is non-existent along the Firth of Clyde;

- Employment is concentrated in the production and distribution of electricity and the manufacture of electricity distribution apparatus;

- This provides the Firth with an potential link to marine power generation; and some of the skills it may require;

- Current research facilities are elsewhere on the west and north coast of Scotland. Is the Firth of Clyde a suitable location for such facilities?;

- Environmental objections such as those raised against the Beauly – Denny transmission line are likely with any proposal for marine power generation in the Firth of Clyde

[11] Forum for Renewable Energy Development in Scotland Marine Energy Group

3.3 Fish Farming

3.3.1 Introduction

This paper presents a profile of the Fish Farming industry in the littoral strip on the Firth of Clyde. Fish farming is defined as the following 2003 SIC code:

- 0502: Operation of fish hatcheries and fish farms.

Activity is reported for Inner and Outer Firth of Clyde.

3.3.2 Employment

Table 3.5 reports Fish Farming employment in 2005 by gender, area and sub-sector.

Table 3.5: Fish Farming Employment by Gender and Area, 2005

	Inner	Outer	Scotland
	Male		
Fish Farming	0	211	1,256
	Female		
Fish Farming	0	54	276
	Total		
Fish Farming	0	265	1,532

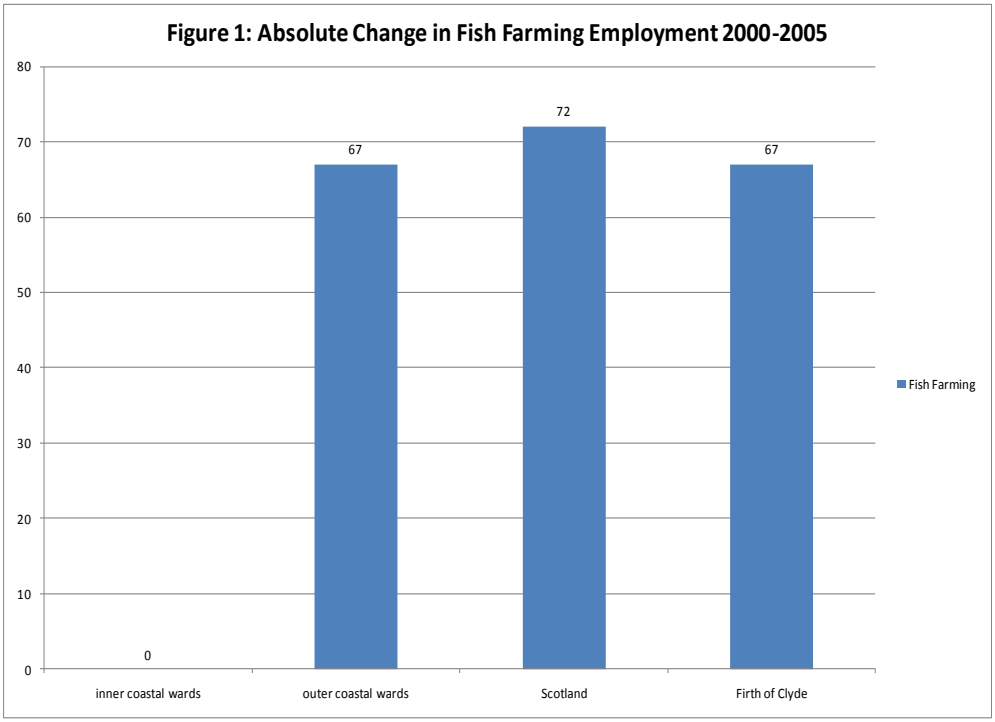
Source: ABI

The Table shows that:

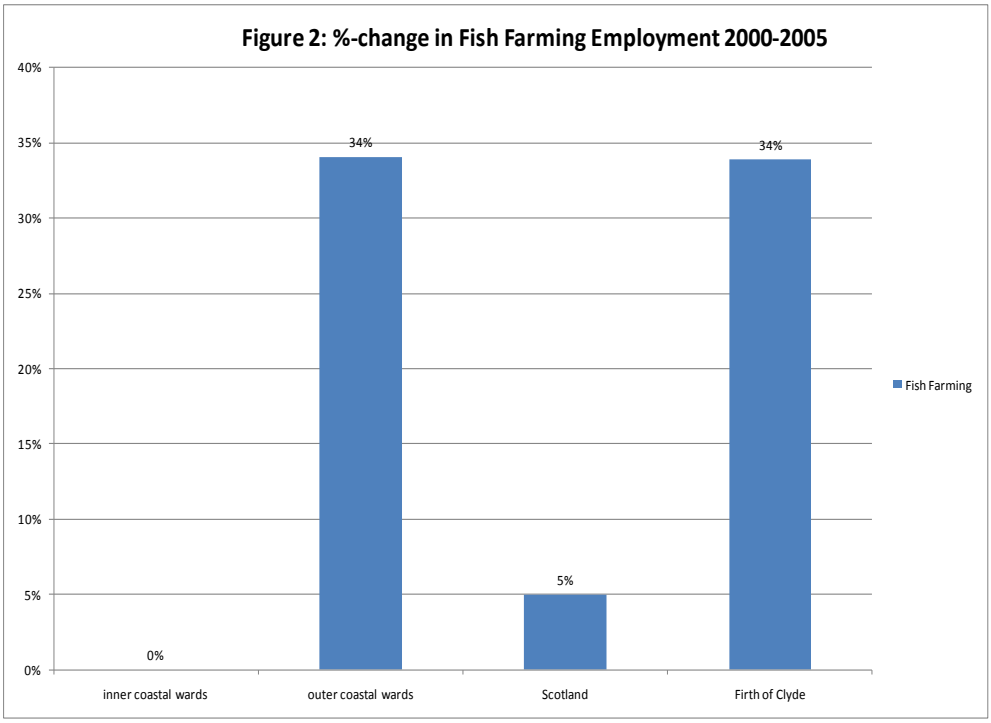
- 211 people are employed in this sector in the Firth of Clyde area;
- 81% of the sector's employees are male;
- 17% of Scotland's employees in this sector are found in Firth of Clyde wards; and
- There are no people employed in fish farming within the inner wards.

Figures 1 & 2, over, depict the %-age and absolute change in Fish Farming employment from 2000-2005. They show that:

- The sector has experienced a significant %-age increase in the Firth of Clyde and outer Coastal wards (34%) but the absolute change is small (67); and
- Scotland shows a much smaller change in employment (5% or 72 employees) suggesting that out with the Firth area, on the west coast of Argyll, the sector has contracted.



Source: ABI



Source: ABI

3.3.3 Workplaces / Business Base

Table 3.6 reports Fish Farming workplaces[12] by area for 2005.

Table 3.6: Fish Farming Workplaces, 2005

	Inner	Outer	Scotland
Fish Farming	0	16	285

Source: ABI

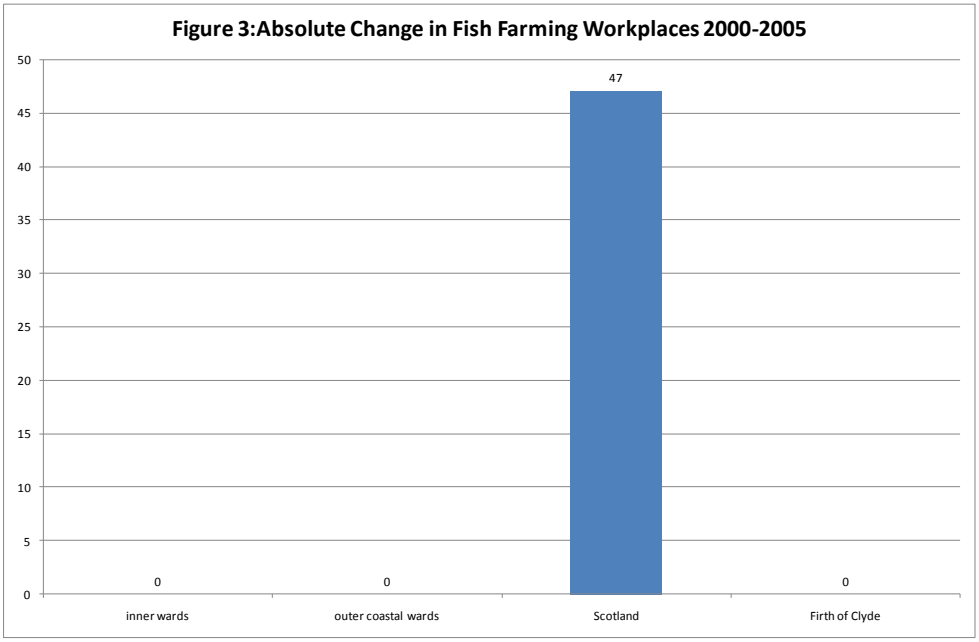
The Table shows that:

- 16 fish farming workplaces are found on the Firth;
- all are located in the outer firth;
- 6% of Scotland's fish farming workplaces are found on the Firth coast.
- As the Firth accounts for 65% of sector employment, this suggests that fish farms on the Firth of Clyde are larger than similar businesses elsewhere in Scotland.

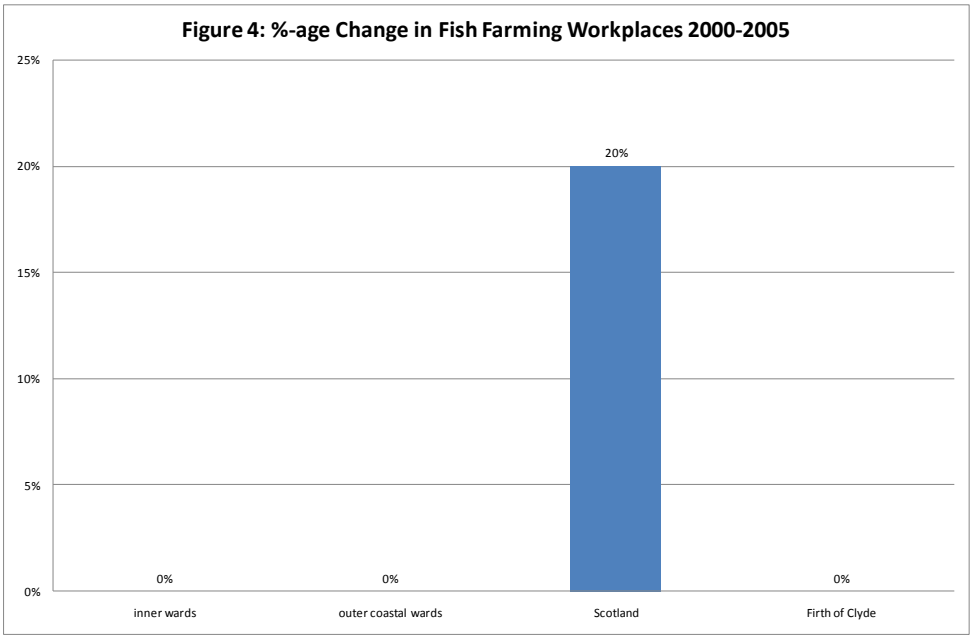
Figures 3&4, over, show the absolute and %-age change in Fish Farming workplaces from 2000 – 2005. They show that:

- The number of workplaces has increased significantly in Scotland and no change has taken place in the Firth of Clyde or inner/outer wards;
- This is counter to the change in employment shown in Figures 1&2 and again suggests that these enterprises are smaller on the west coast than they are on the Firth of Clyde.

[12] ABI workplaces are generally accepted as a proxy for the business base of an area.



Source: ABI



Source: ABI

3.3.4 Turnover

Table 3.7 reports change in turnover by sector, sub-sector and area 2000 – 2005. Calculations are based on turnover per employee[13] of:

- £146,612 in 2000; and
- £106,659 in 2005.

Table 3.7: Turnover (£m)

	Inner		Outer		Scotland	
	2000	2005	2000	2005	2000	2005
Fish Farming	0	0	29.0	28.3	214.1	163.4

Source: Scottish Annual Business Statistics

The Table shows that:

- Fish Farming on the Firth of Clyde Coast totalled £28.3m in 2005;
- This is 17% of sector turnover in Scotland; and
- Turnover in the Firth area is down £0.7m on 2000. Despite an increase in employment there is a decrease in turnover per employee.

3.3.5 GVA

Table 3.8 reports change in GVA by sector, sub-sector and area 2000 – 2005. Calculations are based on GVA per employee[3] of:

- £58,492 in 2000; and
- £52,347 in 2005.

Table 3.8: GVA (£M)

	Inner		Outer		Scotland	
	2000	2005	2000	2005	2000	2005
Fish Farming	0	0	11.6	13.9	85.4	80.2

Source: Scottish Annual Business Statistics

The Table shows that:

- Fish Farming on the Firth of Clyde Coast GVA totalled £13.9m in 2005;
- This is 17% of sector GVA in Scotland; and
- GVA in the Firth area is up £2.3m on 2000 due to both an increase in productivity per employee and increase in employment.

[13] The Scottish Government publish annual statistics on the financial performance of

3.3.6 Sector Review

Fish farming in Scotland is dominated by salmon farming and to a lesser extent trout. In 2004 fish farming in Scotland was worth more than £336m to Scotland. Shellfish farming was worth around £6m. Some of the key issues facing the sector at present are:

- The trend of mergers and acquisitions in recent years has placed much of the sector in overseas ownership. The recent merger of the big three salmon farmers (Marine Harvest, Pan Fish and Fjord) still to work through the industry;
- Growing demand in UK not matched by increased domestic production could open the way for cheaper foreign farmed fish from Chile and Norway;
- Sustainability. Fish farms typically operate in fragile rural economies and environments and need to be sensitive to the demands of both;
- Opportunities to grow the shellfish markets.

3.3.7 Conclusions

The following conclusions can be drawn from this profile:

- Fish farming is an insignificant employer on the Firth of Clyde. Even along the outer firth it accounts for only 0.1% of employees. However, in their immediate local area fish farming could be an important local employer.
- Employment in the firth has increased in contrast to the sector's performance elsewhere in Scotland;
- There was no change in the business base in the firth area from 2000 – 2005 whereas it grew in other parts of Scotland;
- These changes in employment and business base may imply the sector is consolidating along the firth but fracturing into more but smaller units elsewhere;
- The fall in turnover coupled with a rise in GVA could suggest that the sector has become more competitive but at the same time more efficient;

Recent trends and mergers in the fish farming industry may not yet have resulted in the full impact.

3.4 Fishing

3.4.1 Introduction

This paper presents a profile of the Fishing industry in the littoral strip on the Firth of Clyde. The fishing sector is defined as the following 2003 SIC codes[14]:

- 0501: Fishing;
- 1520: Processing and preserving of fish and fish products;
- 5138: Wholesale of other food including fish, crustaceans and molluscs; and
- 5223: Retail sale of fish, crustaceans and molluscs.

3.4.2 Employment

Table 3.9 reports Fishing employment in 2005 by gender, area and sub-sector.

Table 3.9: Fishing Sector Employment by Gender and Area, 2005

	Inner	Outer	Scotland
Male			
Fishing sector	63	382	10,706
Fishing	4	154	2,198
Processing and preserving of fish and fish products	0	89	5,998
Wholesale of other food including fish, crustaceans and molluscs	54	110	2,198
Retail sale of fish, crustaceans and molluscs	5	29	312
Female			
Fishing sector	33	170	5,354
Fishing	1	32	375
Processing and preserving of fish and fish products	0	49	3,569
Wholesale of other food including fish, crustaceans and molluscs	24	48	906
Retail sale of fish, crustaceans and molluscs	8	41	505
Total			
Fishing sector	96	552	16,060
Fishing	4	186	2,573
Processing and preserving of fish and fish products	0	138	9,567
Wholesale of other food including fish, crustaceans and molluscs	77	159	3,104
Retail sale of fish, crustaceans and molluscs	12	71	817

Source: ABI

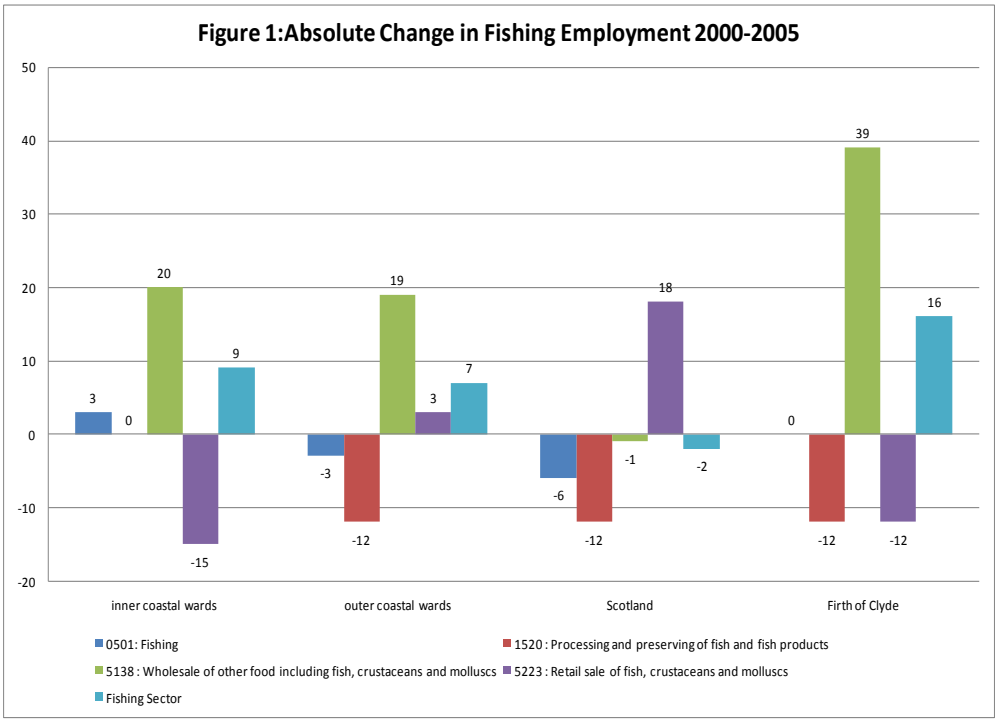
[14] Please note that this sector does not include operation of fish hatcheries and fish farms.

The Table shows that:

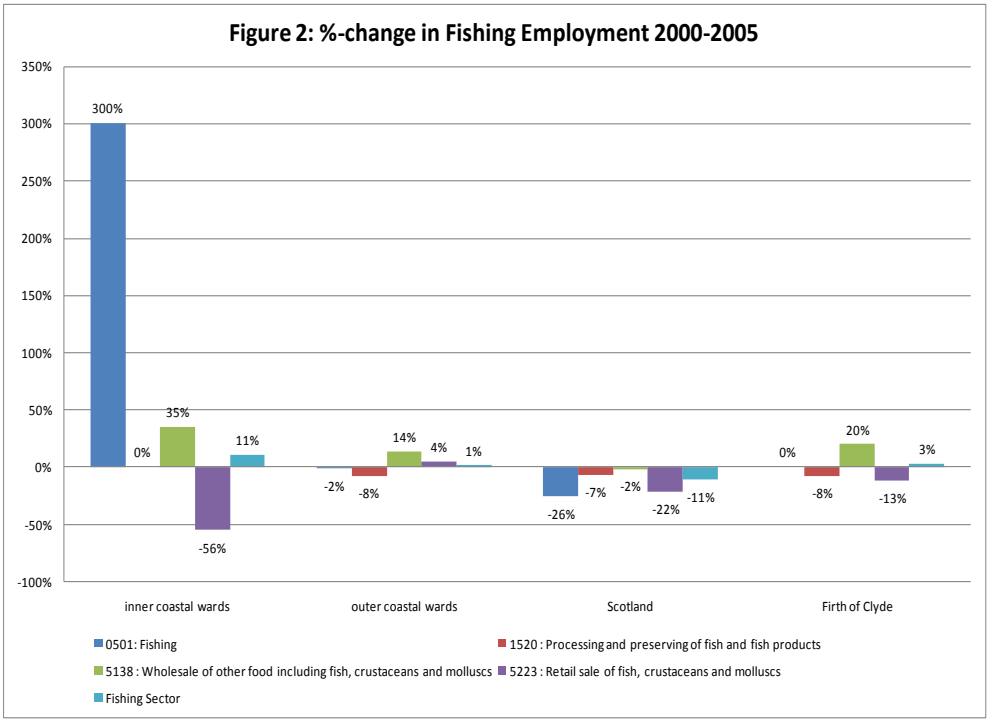
- 648 people are employed in this sector in the Firth of Clyde area;
- 15% are in the inner firth and 85% in the outer;
- 68% of the sector's employees are male;
- 4% of Scotland's employees in this sector are found in Firth of Clyde wards; and
- Fishing employment within the inner wards is mainly concerned with the wholesale of food.

Figures 1 & 2, over, depict the %-age and absolute change in Fishing employment from 2000-2005. They show that:

- The only level where the sector has experienced a decline is in Scotland;
- Absolute increase has been greatest in the Firth of Clyde and %-age age increase has been greatest in the inner wards; and
- %-age change in fishing employment in the inner wards appears significant as it has increased by 300%, but it is small in absolute terms as only three new jobs have been created in this area.



Source: ABI



Source: ABI

3.4.3 Workplaces / Business Base

Table 3.10 reports Fishing workplaces[15] by area for 2005.

Table 3.10: Fishing Workplaces, 2005

	Inner	Outer	Scotland
Fishing sector	15	168	2,416
Fishing	2	113	1,620
Processing and preserving of fish and fish products	0	13	195
Wholesale of other food including fish, crustaceans and molluscs	8	22	303
Retail sale of fish, crustaceans and molluscs	5	20	298

Source: ABI

The Table shows that:

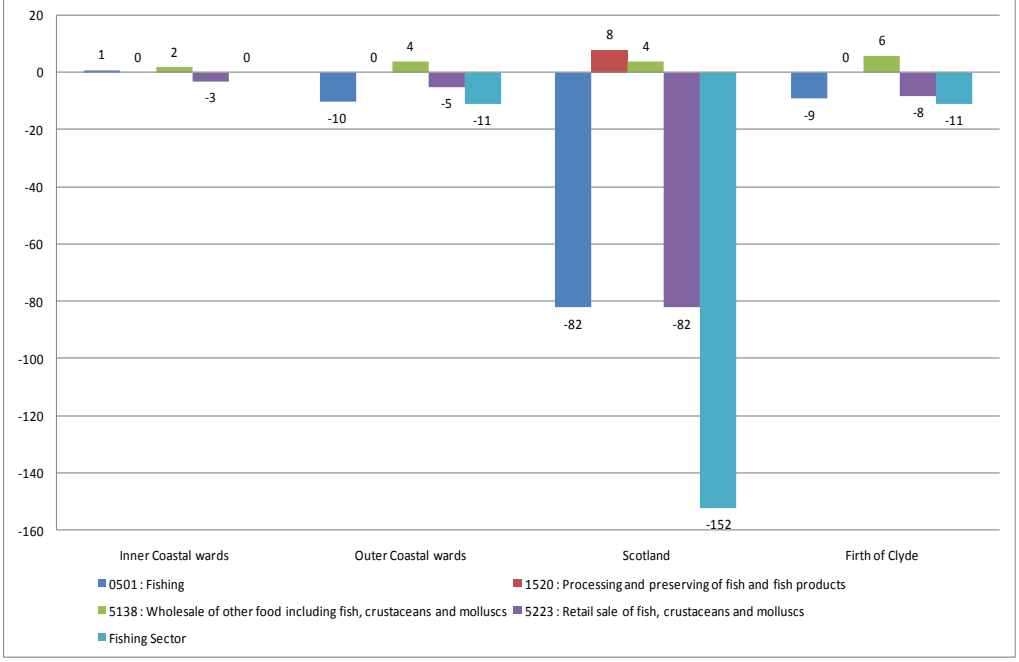
- 183 fishing workplaces are found on the Firth;
- 8% are located in the inner firth and 92% in the outer;
- There are no businesses engaged in processing and preserving of fish and fish products in the inner wards but 13 engaged in the wholesale or retail of fish; and
- 8% of Scotland's fishing workplaces are found on the Firth coast.

[15] ABI workplaces are generally accepted as a proxy for the business base of an area.

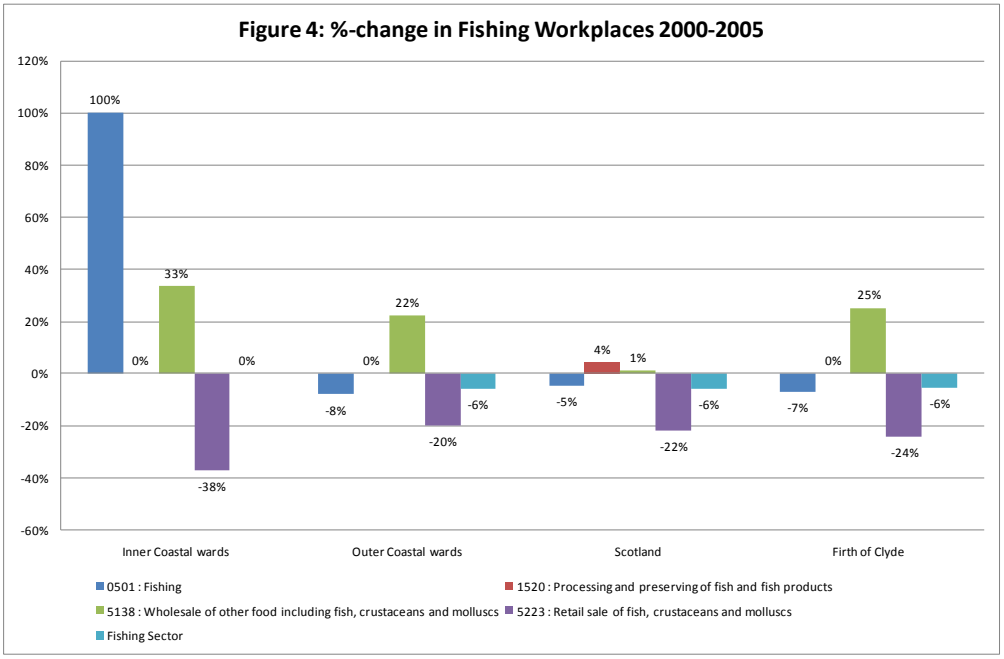
Figures 3&4, over, show the absolute and %-age change in fishing workplaces from 2000 – 2005. They show that:

- The number of workplaces has fallen more in Scotland than in the coastal Firth;
- The loss is greater in outer wards than inner wards; and
- %-age change in fishing in the inner wards appears high as it has increased by 100%, but it is small in absolute terms as only one more fishing business has been established in this area.

Figure 3: Absolute Change in Fishing Workplaces 2000-2005



Source: ABI



Source: ABI

3.4.4 Turnover

Table 3.11 reports change in turnover by sector, sub-sector and area 2000 – 2005. Calculations are based on turnover per employee[16] of:

- £146,612 in 2000; and
- £106,659 in 2005.

Table 3.11: Turnover (£m)

	Inner		Outer		Scotland	
	2000	2005	2000	2005	2000	2005
Fishing sector	12.5	10.0	80.2	59.1	2646.9	1712.9
Fishing	0.15	0.43	27.7	19.8	510.5	274.4
Processing and preserving of fish and fish products	0	0	22.0	14.7	1515.5	1020.4
Wholesale of other food including fish, crustaceans and molluscs	8.4	8.2	20.5	17.0	466.7	331.1
Retail sale of fish, crustaceans and molluscs	4.0	1.3	10.0	7.6	154.2	87.1

Source: Scottish Annual Business Statistics

[16] The Scottish Government publish annual statistics on the financial performance of

The Table shows that:

- Fishing on the Firth of Clyde Coast totalled £69.1m in 2005;
- This is 4% of sector turnover in Scotland; and
- Turnover in the Firth area is down £23.6m on 2000 and there has been a decrease in turnover per employee and only a slight increase in employment.

3.4.5 GVA

Table 3.12 reports change in GVA by sector, sub-sector and area 2000 – 2005. Calculations are based on GVA per employee[3] of:

- £58,492 in 2000; and
- £52,347 in 2005.

Table 3.12: GVA (£M)

	Inner		Outer		Scotland	
	2000	2005	2000	2005	2000	2005
Fishing Sector	5.0	4.9	32.0	29.0	1056.0	840.7
Fishing	0.05	0.2	11.1	9.7	203.7	134.7
Processing and preserving of fish and fish products	0	0	8.8	7.2	604.6	500.8
Wholesale of other food including fish, crustaceans and molluscs	3.3	4.0	8.2	8.2	186.2	162.5
Retail sale of fish, crustaceans and molluscs	1.6	0.6	4.0	3.7	61.5	42.8

Source: Scottish Annual Business Statistics

The Table shows that:

- Fishing on the Firth of Clyde Coast GVA totalled £33.9m in 2005;
- This is 4% of sector GVA in Scotland; and
- GVA in the Firth area is down £3.1m on 2000, and there has been a decrease in productivity per employee.

3.4.6 Sector Review

The argument and debate over the EU Common Fisheries Policy is well known. The restrictive quotas on white fish seem likely to continue and more vessels may be decommissioned as a result. While this is mainly

seen as an issue for the North Sea and east coast fleets there are implications for the west coast as well.

The main issues facing the sea fisheries sector are around:

- Sustainability
  - Long term sustainable fisheries
  - Safeguarding the marine environment
  - Improving understanding and decision making
- Profitability
  - Competitiveness from producer to consumer
  - Supporting sea fisheries businesses
  - Supporting dependent communities to continue with sea fishing and to diversify
- Good management
  - Rebuilding good governance
  - Simplified and better regulation
  - Effective enforcement and compliance

3.4.7 Conclusions

The following conclusions can be drawn from this profile:

- Fishing is not a significant employer in the Firth of Clyde. Even in the outer firth it accounts for only 0.5% of all employees. However, in some more remote areas it may still be an important source of local employment;

- Primary (fish catching) activity is about 30% of the sector and is located in the outer firth area;

- Processing activity along the firth is entirely located in the outer area but a substantial proportion of the distribution activity (40%) is found in the inner area. However, in both cases most activity takes place elsewhere in Scotland;

- Turnover and GVA is down. This may suggest the sector is both less competitive and less efficient.

3.5 Construction-related

3.5.1 Introduction

This paper presents a profile of the construction industry in the littoral strip on the Firth of Clyde.

This industry is defined as a sub-sector of the broadly defined construction activity reported on in the socio-economic overview. Marine construction is defined as the following 2003 SIC codes:

- 4521: General construction of buildings and civil engineering works; and
- 4524: Construction of water projects.

3.5.2 Employment

Table 3.13 reports Marine Construction employment in 2005 by gender, area and sub-sector.

Table 3.13: Marine Construction Employment by Gender and Area, 2005

	Inner	Outer	Scotland
Male			
Construction - related	1657	1586	45,638
General construction & civil engineering	1657	1585	45,559
Construction of water projects	0	1	79
Female			
Construction - related	334	245	6,631
General construction & civil engineering	334	245	6,617
Construction of water projects	0	0	14
Total			
Construction - related	1991	1830	52,268
General construction & civil engineering	1991	1829	52,176
Construction of water projects	0	1	93

Source: ABI

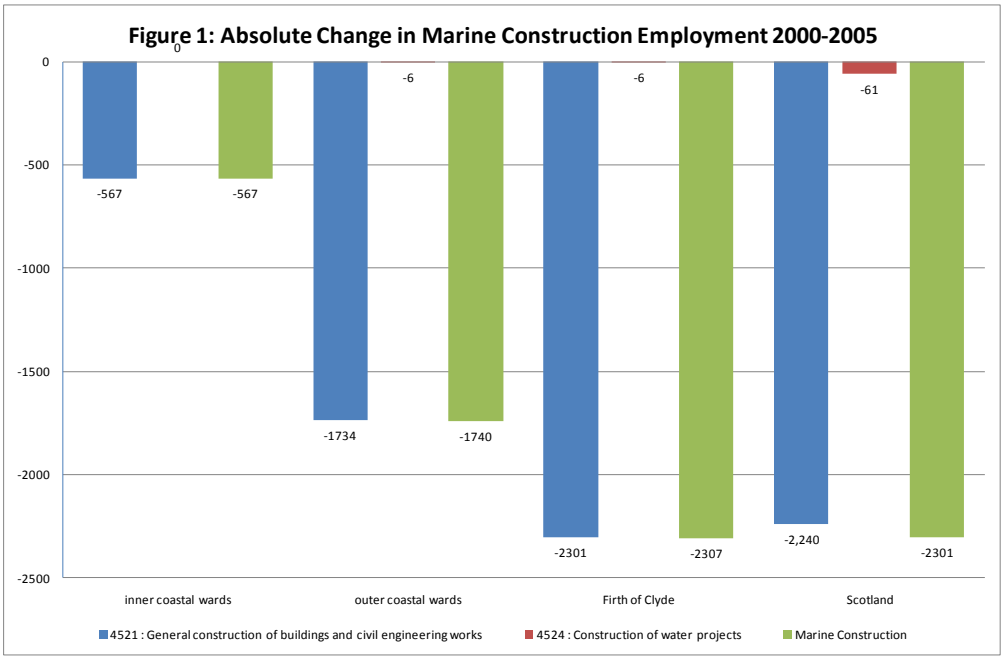
The Table shows that:

- 3821 people are employed in this sector in the Firth of Clyde area;
- 52% are in the inner firth and 48% in the outer;
- 85% of the sector's employees are male;

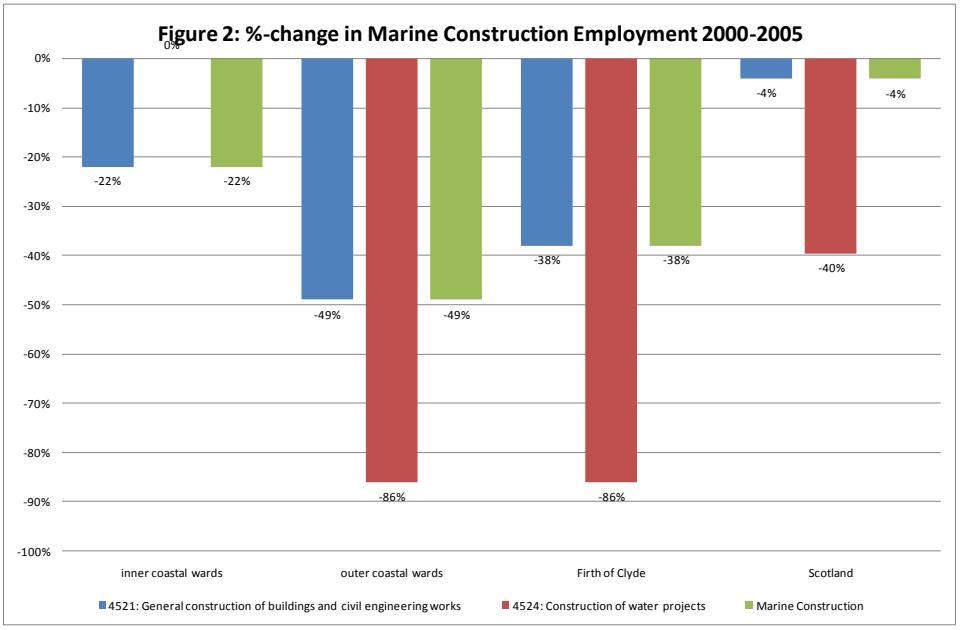
- 7% of Scotland's employees in this sector are found in Firth of Clyde wards; and
- Change in the Firth of Clyde area has been more dramatic than for Scotland;

Figures 1 & 2, over, depict the %-age and absolute change in Marine Construction employment from 2000-2005. They show that:

- The sector has suffered a greater decline in the coastal Firth than in Scotland;
- %-age decline has been greatest in the outer wards; and
- %-age change in water projects employment appears significant but is marginal in absolute terms.



Source: ABI



Source: ABI

3.5.3 Workplaces / Business Base

Table 3.14 reports Marine Construction workplaces[17] by area for 2005.

Table 3.14: Marine Construction Workplaces, 2005

	Inner	Outer	Scotland
Marine Construction	126	196	4050
General construction & civil engineering	126	195	4,025
Construction of water projects	0	1	25

Source: ABI

The Table shows that:

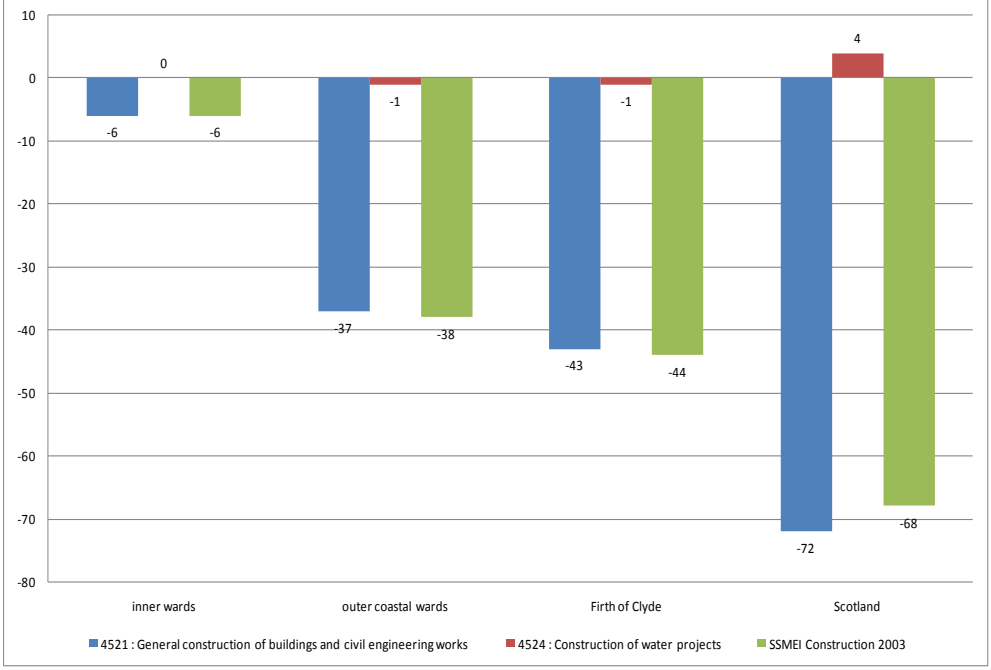
- 322 marine construction workplaces are found on the Firth;
- 39% are located in the inner firth and 61% in the outer;
- This suggest business will typically be larger in the inner Firth and smaller in the outer areas;
- Only 1 business is engaged in water related construction projects; and
- 8% of Scotland's marine construction workplaces are found there.

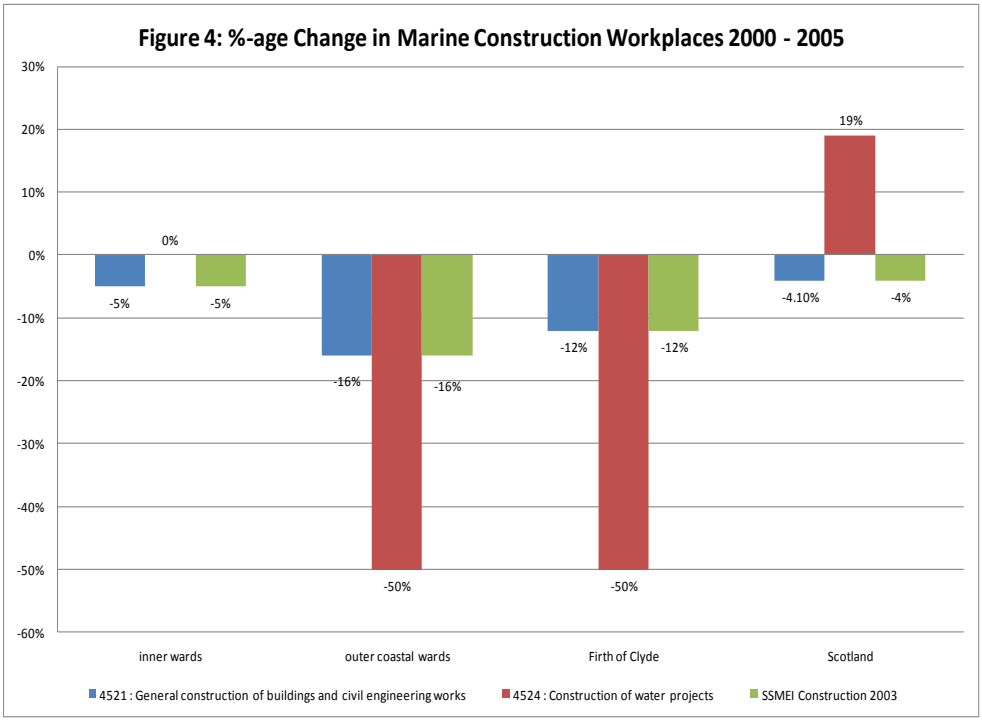
[17] ABI workplaces are generally accepted as a proxy for the business base of an area.

Figures 3&4, over, show the absolute and %-age change in Marine Construction workplaces from 2000 – 2005. They show that:

- The number of workplaces has fallen more in Scotland than in the Coastal Firth;
- The loss is greater in outer wards than inner wards; and
- %-age change in the water related construction project base appears high but in absolute terms is marginal.

Figure 3: Absolute Change in Marine Construction Workplaces, 2000-2005




Figure 4: %-age Change in Marine Construction Workplaces 2000 - 2005
30%
20%
10%
0%
-10%
-20%
-30%
-40%
-50%
-60%
0%
-5%
-5%
-16%
-50%
-16%
-12%
-50%
-12%
19%
-4.10%
-4%
inner wards
outer coastal wards
Firth of Clyde
Scotland
4521 : General construction of buildings and civil engineering works
4524 : Construction of water projects
SSMEI Construction 2003

Source: ABI

3.5.4 Turnover

Table 3.15 reports change in turnover by sector, sub-sector and area 2000 – 2005. Calculations are based on turnover per employee[18] of:

- £73,600 in 2000; and
- £103,300 in 2005.

Table 3.15: Turnover (£m)

	Inner		Outer		Scotland	
	2000	2005	2000	2005	2000	2000
Marine Construction	188.3	205.7	262.8	189.0	2235.0	2235.0
General construction & civil engineering	188.3	205.7	262.2	188.9	2231.8	2231.8
Construction of water projects	0.0	0.0	0.5	0.1	3.2	3.2

Source: Scottish Annual Business Statistics

The Table shows that:

- Marine Construction on the Firth of Clyde Coast totalled £394.7m in 2005;
- This is 7% of sector turnover in Scotland; and
- Turnover in the Firth area is down £56.3m on 2000 despite an increase in turnover per employee.

3.5.5 GVA

Table 3.16 reports change in GVA by sector, sub-sector and area 2000 – 2005. Calculations are based on GVA per employee[3] of:

- £29,000 in 2000; and
- £40,800 in 2005.

Table 3.16: GVA (£M)

	Inner		Outer		Scotland	
	2000	2005	2000	2005	2000	2005
Marine Construction	74.2	81.2	103.5	53.1	880.6	2132.5
General construction & civil engineering	74.2	81.2	103.3	53.0	879.4	2128.8
Construction of water projects	0.0	0.0	0.2	0.0	1.3	3.8

[18] The Scottish Government publish annual statistics on the financial performance of

The Table shows that:

- Marine Construction on the Firth of Clyde Coast GVA totalled £134.3m in 2005;
- This is 6% of sector GVA in Scotland; and
- GVA in the Firth area is down £43.4m on 2000 despite an increase in productivity per employee.

3.5.6 Sector Review

The marine construction and civil engineering sub-sectors discussed above are only a small part of the wider construction sector. However, the issues faced are generally considered to be the same across the whole construction industry.

- Skills shortages at both skilled craft and graduate level;
- Ageing workforce due to low numbers of new entrants;
- Image. Construction is widely seen as poorly paid, seasonal and insecure;
- Lure of major projects. Projects such as the London Olympics attract large numbers of workers by paying high wages. This exacerbates shortages and pushes up prices elsewhere.

3.5.7 Conclusions

The following conclusions can be drawn from this profile:

- Marine construction is not a major employer in the Firth of Clyde, accounting for about 1% of all employees (although this rises to nearly 2%in the outer wards;
- The sector has declined significantly from 2000 – 2005;
- There is no strong knowledge base in water related construction projects on the Firth;
- There is no reason to suggest the maritime construction sector will behave differently or be subject to different constraints than the rest of the construction sector.

3.6 Defence

3.6.1 Introduction

This paper presents a profile of the Defence industry in the littoral strip on the Firth of Clyde.

Defence is defined as the following 2003 SIC codes:

- 7514: Supporting service activities for the government as a whole; and
- 7522: Defence activities.

3.6.2 Employment

Table 3.17 reports Defence employment in 2005 by gender, area and sub-sector.

Table 3.17: Defence Employment by Gender and Area, 2005

	Inner	Outer	Scotland
Male			
Defence	847	1,581	5,429
Supporting service activities for government as a whole	1	113	853
Defence Activities	846	1,468	4,577
Female			
Defence	592	1,136	4,065
Supporting service activities for government as a whole	2	130	888
Defence Activities	590	1,006	3,177
Total			
Defence	1,439	2,717	9,495
Supporting service activities for government as a whole	3	243	1,741
Defence Activities	1,436	2,474	7,754

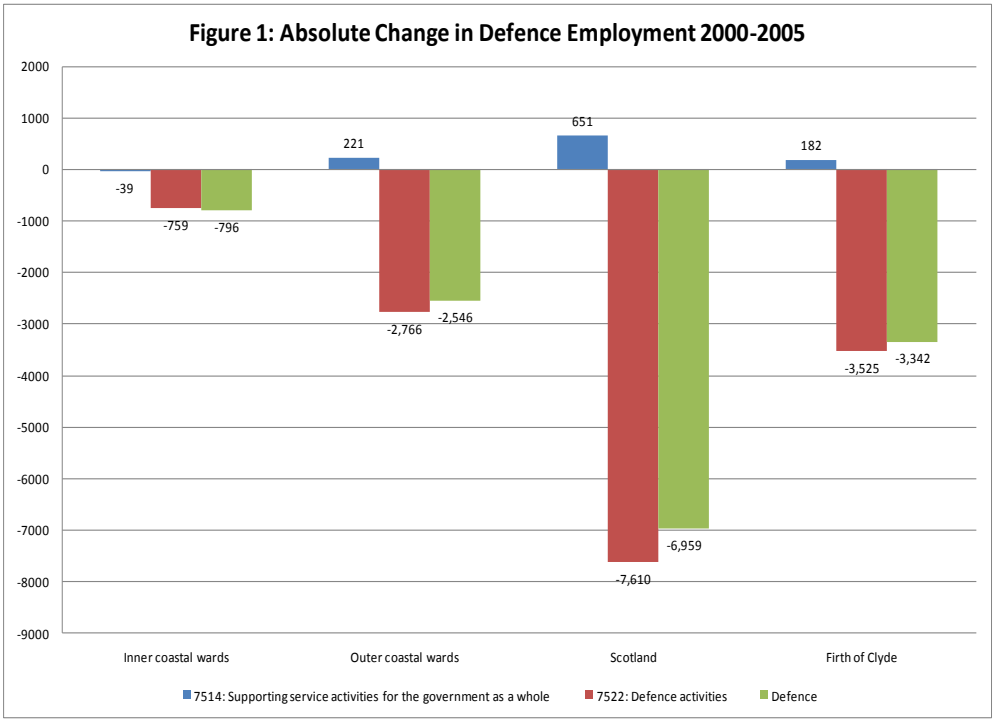
Source: ABI

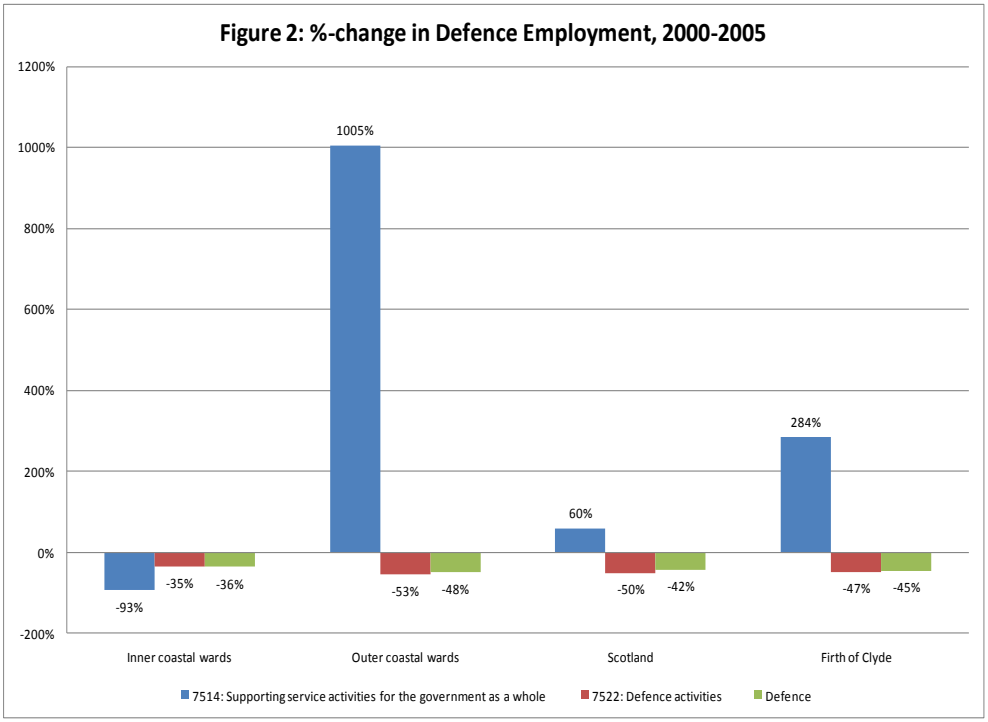
The Table shows that:

- 4,156 people are employed in this sector in the Firth of Clyde area;
- 27 % are in the inner firth and 73% in the outer;
- 58% of the sector's employees are male;
- 44% of Scotland's employees in this sector are found in Firth of Clyde wards; and
- supporting service activities for the government as a whole is irrelevant to the Firth of Clyde.

Figures 1 & 2, over, depict the %-age and absolute change in Defence employment from 2000-2005. They show that:

- The sector has suffered a significant loss and most of this loss is from Scotland as a whole;
- %-age change in supporting service activities for the government as a whole appears significant in the outer coastal wards and Firth of Clyde but is marginal in absolute terms.




Figure 2: %-change in Defence Employment, 2000-2005
1200%
1000%
800%
600%
400%
200%
0%
-200%
1005%
284%
60%
-93%
-35%
-36%
-53%
-48%
-50%
-42%
-47%
-45%
Inner coastal wards
Outer coastal wards
Scotland
Firth of Clyde
7514: Supporting service activities for the government as a whole
7522: Defence activities
Defence

Source: ABI

3.6.3 Workplaces / Business Base

Table 3.18 reports Defence workplaces[19] by area for 2005.

Table 3.18: Marine Construction Workplaces, 2005

	Inner	Outer	Scotland
Defence	5	10	124
Supporting service activities for government as a whole	1	4	63
Defence Activities	4	6	61

Source: ABI

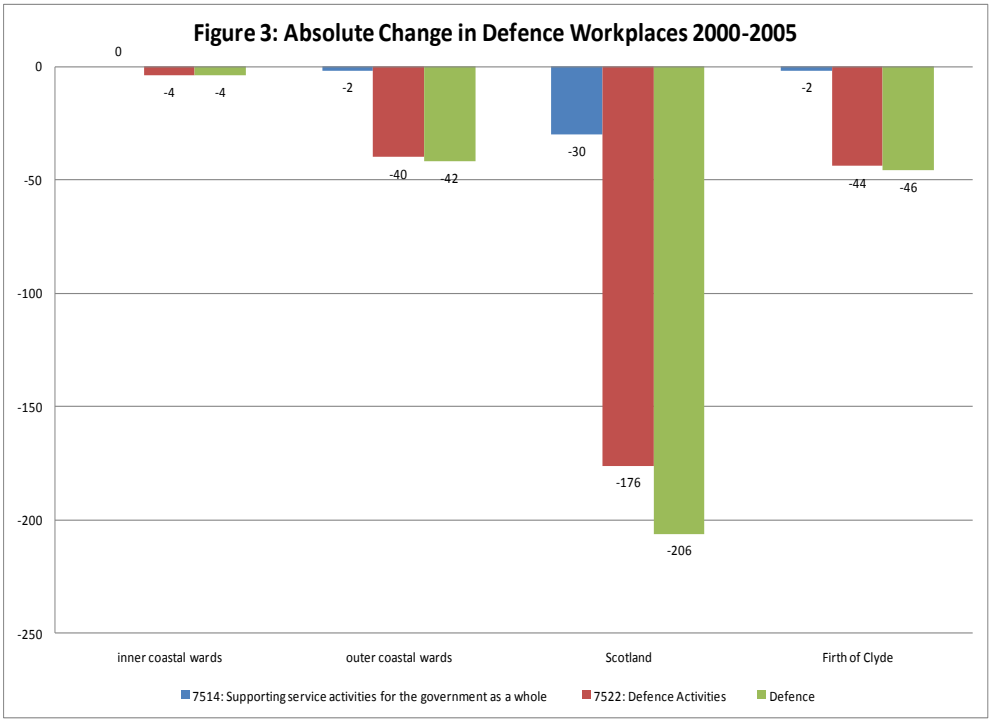
The Table shows that:

- 15 defence workplaces are found on the Firth;
- 33% are located in the inner firth and 67% in the outer;
- Only 1 business is engaged in supporting service activities for the government as a whole within the inner wards; and
- 12% of Scotland's defence workplaces are found on Firth coast.

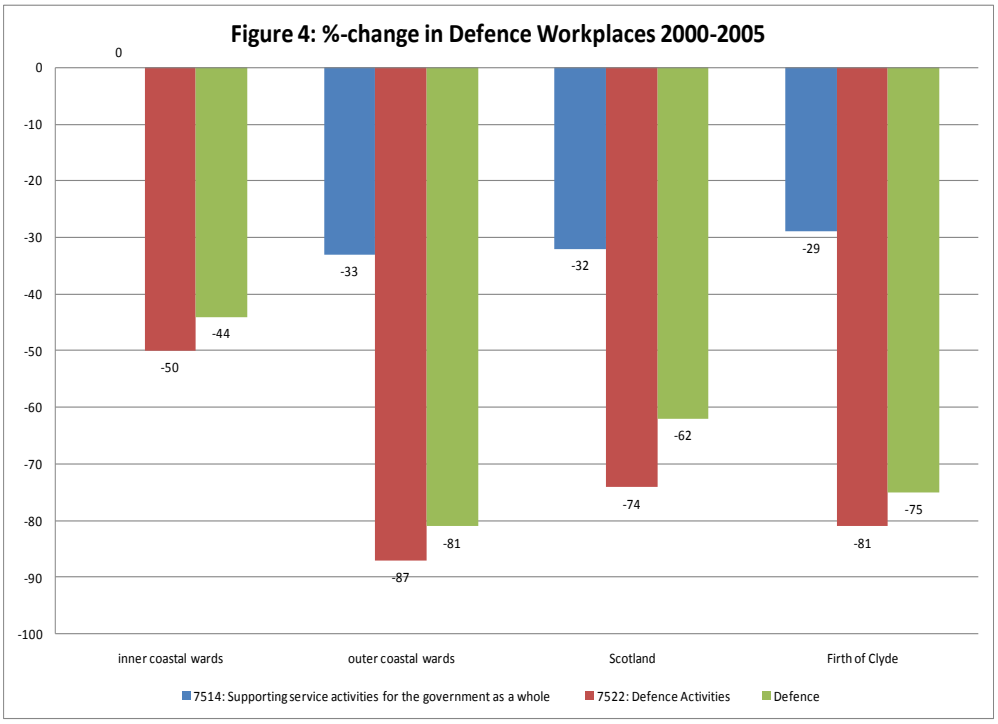
Figures 3&4, over, show the absolute and %-age change in Defence workplaces from 2000 – 2005. They show that:

- The number of workplaces has fallen more in Scotland than on the Firth of Clyde coast.
- The loss is greater in outer wards than inner wards; and
- %-age change in defence activities appears high especially in the Firth area.

[19] ABI workplaces are generally accepted as a proxy for the business base of an area.



Source: ABI



Source: ABI

3.6.4 Turnover

Table 3.19 reports change in turnover by sector, sub-sector and area 2000 – 2005. Calculations are based on turnover per employee[20] of:

- £65,696 in 2000; and
- £81,676 in 2005.

Table 3.19: Turnover (£m)

	Inner		Outer		Scotland	
	2000	2005	2000	2005	2000	2005
Defence	146.9	117.5	345.7	221.9	1081	775.4
Supporting service activities for government as a whole	2.7	0.2	1.4	19.8	71.6	142.2
Defence Activities	144.3	117.3	344.2	202.1	1009.4	633.3

Source: Scottish Annual Business Statistics

The Table shows that:

- Defence on the Firth of Clyde Coast totalled £339.4m in 2005;
- This is 44% of sector turnover in Scotland; and
- Turnover in the Firth area is down £153.2m on 2000 despite an increase in turnover per employee.

3.6.5 GVA

Table 3.20 reports change in GVA by sector, sub-sector and area 2000 – 2005. Calculations are based on GVA per employee[3] of:

- £21,680 in 2000; and
- £29,747 in 2005.

Table 3.20: GVA (£M)

	Inner		Outer		Scotland	
	2000	2005	2000	2005	2000	2005
Defence	48.5	42.8	114.1	80.8	356.7	282.4
Supporting service activities for government	0.9	0.09	0.5	7.2	23.6	51.8
Defence Activities	47.6	42.7	113.6	73.6	333.1	230.7

Source: Scottish Annual Business Statistics

[20] The Scottish Government publish annual statistics on the financial performance of

The Table shows that:

- Defence on the Firth of Clyde Coast GVA totalled £123.6m in 2005;
- This is 44% of sector GVA in Scotland; and
- GVA in the Firth area is down £39m on 2000 despite an increase in productivity per employee.

3.6.6 Sector Review

HMNB Clyde is the largest military establishment in Scotland. The bases at Faslane and Coulport are most often associated with the UK's strategic nuclear deterrent submarines but it is also the home port to 4 conventionally armed attack submarines and a squadron of eight mine countermeasures vessels. Some of the key factors and issues are:

- Current programmes to refit and upgrade service accommodation on the base (£125m);
- £135m to construct a new jetty to service and support the next generation of attack submarines based at Faslane;
- HMNB Clyde employs 6500 across the RN, civil service and private contractors;
- Long term future of the strategic nuclear deterrent submarines;
- Pressure on the Defence budget from without and competing priorities from within.

3.6.7 Conclusions

The following conclusions can be drawn from this profile:

- Defence is an important employer in the Firth of Clyde. Employment is concentrated in the outer firth where most employees are most likely associated with the Faslane base. Several thousand other employees are probably directly dependent on the naval presence;
- Defence employment has declined significantly from 2000 – 2005;
- Some of this change may be due to "civilianisation" of tasks previously carried out by naval personnel;
- Pressure on defence spending may lead to further economies;
- The medium – long term future of the base is probably secure in substantially the same form;
- Naval activity in the Firth may restrict the development of other facilities and economic activities.

3.7 Recreation & Tourism

3.7.1 Introduction

This paper presents a profile of the Recreation and Tourism industry in the littoral strip on the Firth of Clyde.

Recreation and tourism is defined as the following 2003 SIC codes:

- 5521: Youth hostels and mountain refuges;
- 551: Hotels;
- 553: Restaurants;
- 554: Bars;
- 555: Canteens and Catering;
- 633: Activities of travel agencies and tour operators; tourist assistance activities not elsewhere classified;
- 923: Other entertainment activities;
- 925: Library, archives, museums and other cultural activities; and
- 926: Sporting activities.

3.7.2 Employment

Table 3.21 reports Recreation and Tourism employment in 2005 by gender, area and sub-sector.

The Table shows that:

- 31,286 people are employed in this sector in the Firth of Clyde area;
- 57% are in the inner firth and 43% in the outer;
- 42% of the sector's employees are male; and
- 35% of Strathclyde's employees in this sector are found in Firth of Clyde wards.

Figures 1 & 2, over, depict the %-age and absolute change in Recreation and Tourism employment from 2000-2005. They show that:

- The sector has experienced significant growth in Scotland;
- Absolute and %-age decline has been greatest in the outer wards;

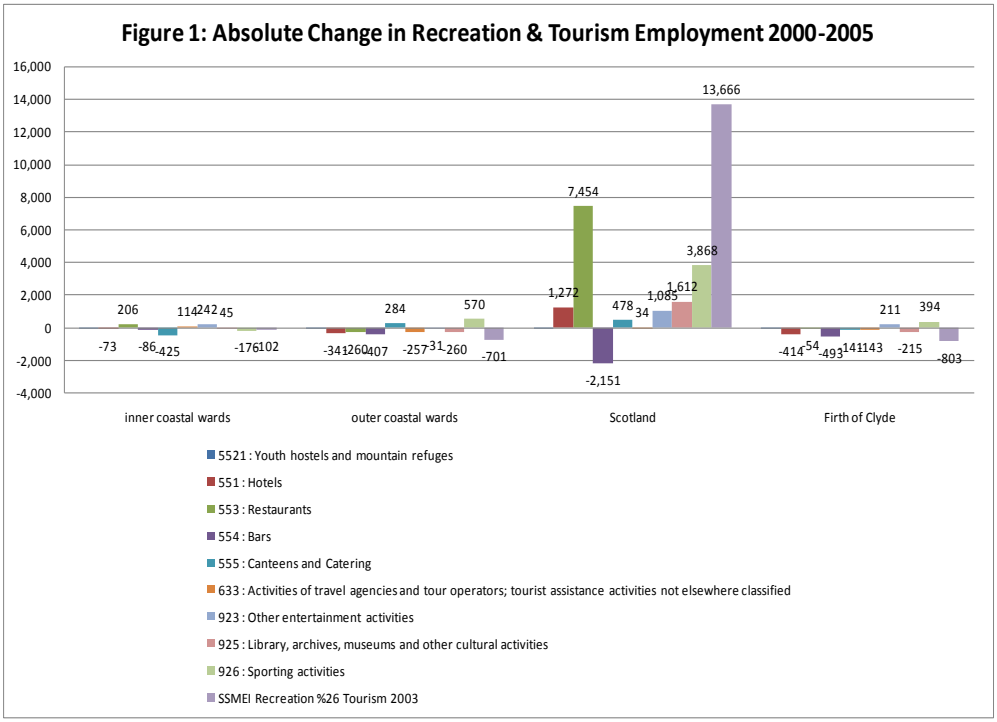
- There is a mixed pattern of growth and contraction and it is different in each part of the firth; and

- %-age change in youth hostels and mountain refuges employment appears significant as it has increased by 400% in the inner wards, but it is marginal in absolute terms as only 55 new jobs have been created within this area.

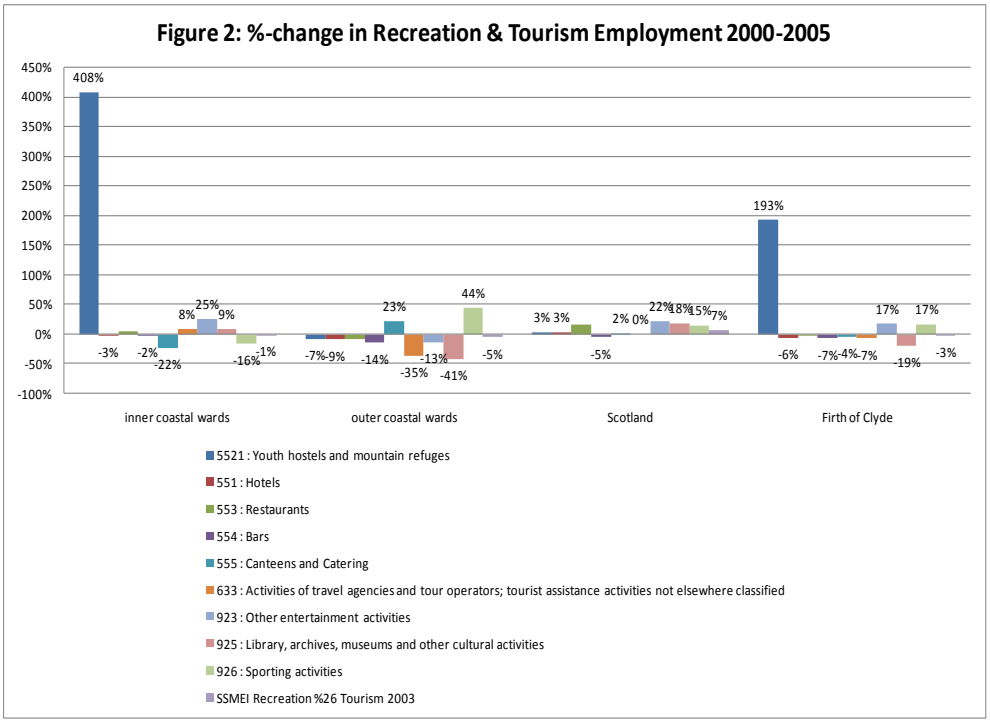
Table 3.21: Recreation and Tourism Employment by Gender and Area, 2005

	Inner	Outer	Scotland
Male			
Recreation & Tourism	7,511	5,655	94,291
Youth hostels and mountain refuges	27	6	230
Hotels	1,170	1,551	20,391
Restaurants	2,264	1,290	23,722
Bars	1,749	1,046	17,103
Canteens and Catering	474	460	8,739
Activities of travel agencies and tour operators; tourist assistance activities not elsewhere classified	475	179	3,088
Other entertainment activities	630	95	2,745
Library, archives, museums and other cultural activities	258	139	4,665
Sporting activities	464	888	13,609
Female			
Recreation & Tourism	10,218	7,903	128,754
Youth hostels and mountain refuges	39	7	259
Hotels	1,641	1,970	27,746
Restaurants	2,841	1,736	30,318
Bars	2,360	1,492	23,306
Canteens and Catering	1,020	1,078	17,105
Activities of travel agencies and tour operators; tourist assistance activities not elsewhere classified	1,015	293	5,455
Other entertainment activities	586	113	3,287
Library, archives, museums and other cultural activities	280	232	5,858
Sporting activities	437	982	15,420
Total			
Recreation & Tourism	17,729	13,557	223,045
Youth hostels and mountain refuges	66	13	489
Hotels	2,811	3,522	48,137
Restaurants	5,105	3,026	54,040
Bars	4,109	2,538	40,408
Canteens and Catering	1,495	1,537	25,844
Activities of travel agencies and tour operators; tourist assistance activities not elsewhere classified	1,490	472	8,543
Other entertainment activities	1,216	208	6,032
Library, archives, museums and other cultural activities	539	370	10,524
Sporting Activities	900	1,870	29,029

Source: ABI



Source: ABI



Source: ABI

3.7.3 Workplaces / Business Base

Table 3.22 reports Recreation and Tourism workplaces[21] by area for 2005.

Table 3.22: Recreation and Tourism Workplaces, 2005

	Inner	Outer	Scotland
Recreation & Tourism	1,226	1,370	19,728
Youth hostels and mountain refuges	2	6	70
Hotels	65	187	2,215
Restaurants	443	404	5,895
Bars	303	300	4,212
Canteens and Catering	117	114	1,845
Activities of travel agencies and tour operators; tourist assistance activities not elsewhere classified	78	69	932
Other entertainment activities	101	65	1,138
Library, archives, museums and other cultural activities	40	60	937
Sporting Activities	77	165	2,484

Source: ABI

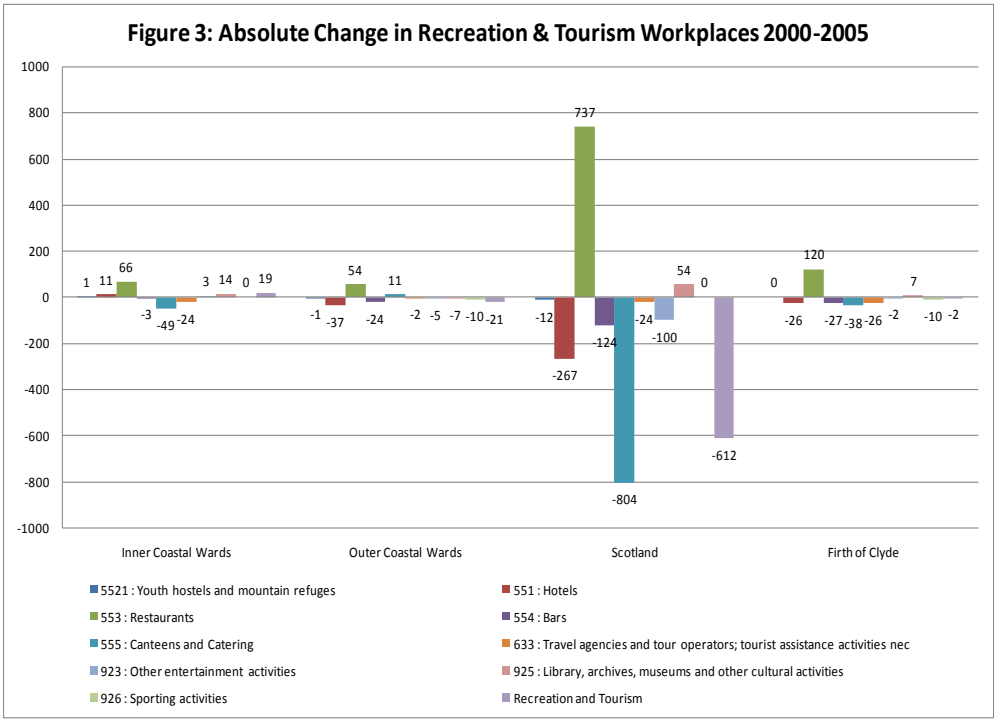
The Table shows that:

- 2,596 recreation and tourism workplaces are found on the Firth;
- 47% are located in the inner firth and 53% in the outer; and
- 13% of Scotland's recreation and tourism workplaces are found on the Firth coast.

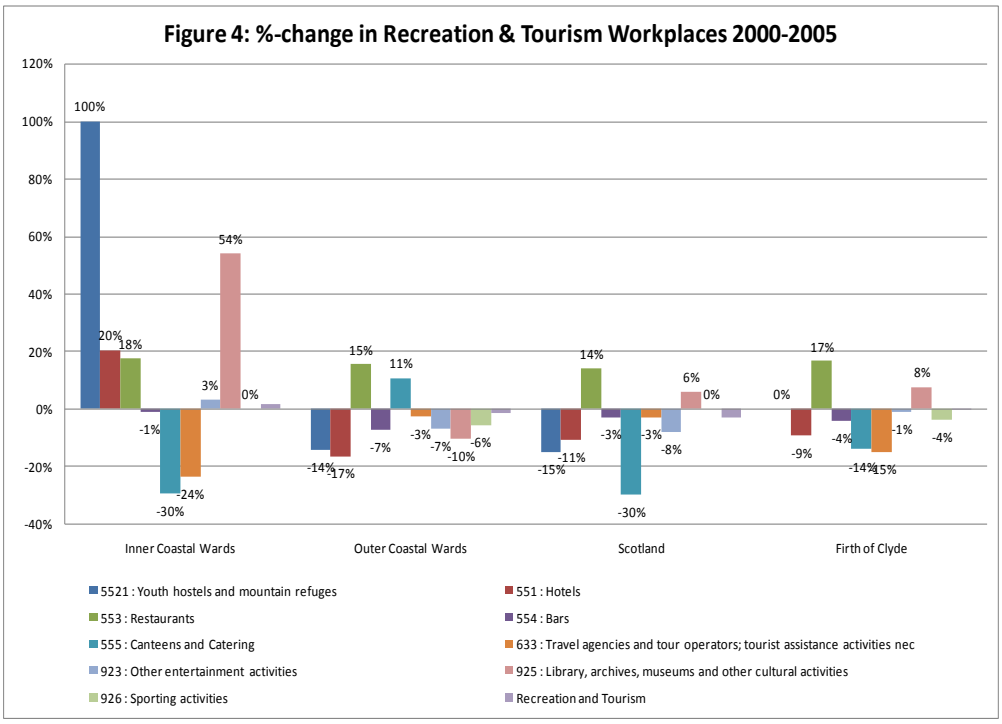
Figures 3&4, over, show the absolute and %-age change in recreation and tourism workplaces from 2000 – 2005. They show that:

- The number of workplaces has fallen more in Scotland than in the coastal Firth, which is almost unchanged;
- There is a small loss in outer ward workplaces balanced by a small rise for the inner wards; and
- The %-age change in youth hostels and mountain refuges again appears high as it has increased by 100% in the inner wards. However, in absolute terms there has been no change in the number of youth hostels and mountain refuges.

[21] ABI workplaces are generally accepted as a proxy for the business base of an area.



Source: ABI



Source: ABI

3.7.4 Turnover

Table 3.23 reports change in turnover by sector, sub-sector and area 2000 – 2005. Calculations are based on turnover per employee[22] of:

- £35,900 in 2000; and
- £56,900 in 2005.

Table 3.23: Turnover (£m)

	Inner		Outer		Scotland	
	2000	2005	2000	2005	2000	2005
Recreation & Tourism	640.1	1008.8	511.9	771.4	7516.7	12691.3
Youth hostels and mountain refuges	0.5	3.8	0.5	0.7	17.0	27.8
Hotels	103.5	159.9	138.7	200.4	1682.5	2739.0
Restaurants	175.9	290.5	118.0	172.2	1672.4	3074.9
Bars	150.6	233.8	105.7	144.4	1527.9	2299.2
Canteens and Catering	69.0	85.1	45.0	87.5	910.6	1470.5
Activities of travel agencies and tour operators etc	49.4	84.8	26.2	26.9	305.5	486.1
Other entertainment activities	35.0	69.2	8.6	11.8	177.6	343.2
Library, archives, museums and other cultural activities	17.7	30.7	22.6	21.1	319.9	598.8
Sporting Activities	38.6	51.2	46.7	106.4	903.3	1651.8

Source: Scottish Annual Business Statistics

The Table shows that:

- Recreation and Tourism on the Firth of Clyde Coast totalled £1780.2m in 2005;
- This is 14% of sector turnover in Scotland; and
- Turnover in the Firth area is up £628.2m on 2000. Despite a fall in employment there has been an increase in turnover per employee.

[22] The Scottish Government publish annual statistics on the financial performance of

3.7.5 GVA

Table 3.24 reports change in GVA by sector, sub-sector and area 2001 – 2005[23]. Calculations are based on GVA per employee[3] of:

- £15,200 in 2001; and
- £18,200 in 2005.

Table 3.24: GVA (£M)

	Inner		Outer		Scotland	
	2001	2005	2001	2005	2001	2005
Recreation & Tourism	271.0	322.7	216.7	246.7	3182.6	4059.4
Youth hostels and mountain refuges	0.2	1.2	0.2	0.2	7.2	8.9
Hotels	43.8	51.2	58.7	64.1	712.3	876.1
Restaurants	74.5	92.9	50.0	55.1	708.1	983.5
Bars	63.8	74.8	44.8	46.2	646.9	735.4
Canteens and Catering	29.2	27.2	19.0	28.0	385.6	470.4
Activities of travel agencies and tour operators etc	20.9	27.1	11.1	13.3	129.3	155.5
Other entertainment activities	14.8	22.1	3.6	3.8	75.2	109.8
Library, archives, museums and other cultural activities	7.5	9.8	9.6	6.7	135.5	191.5
Sporting Activities	16.4	16.4	19.8	34.0	382.4	528.3

Source: Scottish Annual Business Statistics

The Table shows that:

- Recreation and Tourism on the Firth of Clyde Coast GVA totalled £569.4m in 2005;
- This is 14% of sector GVA in Scotland; and
- GVA in the Firth area is up £81.7m on 2001 and as there has been an increase in productivity per employee despite a fall in employee numbers.

[23] Note GVA per employee data is not available for 2000. The earliest year which it is available is 2001.

3.7.6 Sector Review

Some of the key issues facing the recreation and tourism sector are:

- Internationalisation of tourism. Domestic and international travellers have more money and time to spend but also more choice of where to spend it;
- Environmental, political and security concerns are all in different ways potential barriers and opportunities;
- Changing market segments – the decline of the traditional family holiday and the rise of "silver surfers" and activity holidays;
- Demand for an "authentic" experience;
- Business tourism is now worth a fifth of all tourism spend and growing;
- Healthcare and the role of recreation & leisure in improving life expectancy and quality;
- Growth in leisure time and disposable incomes

3.7.7 Conclusions

The following conclusions can be drawn from this profile:

- Recreation and tourism is an important industry employing more than 30,000 across the Firth of Clyde area and 12% of the employees in the outer ward area.
- Overall the employment trend is slightly downwards but the picture varies by sub-sector and by inner and outer firth area. In Scotland the trend is up but again there is a mixed picture by sub-sector;
- The business base also is slightly down and presents a mixed picture;
- Turnover and GVA are both up suggesting the sector is competitive and efficient;
- The Firth of Clyde is well placed to take advantage of interest in activity and environmental tourism and activity, with a large domestic catchment area and good international links by air and sea.

3.8 Shipping and Transport

3.8.1 Introduction

This paper presents a profile of the Shipping and Transport industry in the littoral strip on the Firth of Clyde.

Shipping and Transport is defined as the following 2003 SIC codes:

- 2911: Manufacture of engines and turbines, except aircraft, vehicle and cycle engines;
- 7122: Renting of water transport equipment;
- 351: Building and repairing of ships and boats;
- 611: Sea and coastal water transport;
- 631: Cargo handling and storage;
- 634: Activities of other transport agencies; and
- 6322: Other supporting water transport activities.

3.8.2 Employment

Table 3.25 reports Shipping and Transport employment in 2005 by gender, area and sub-sector.

The Table shows that:

- 5,777 people are employed in this sector in the Firth of Clyde area;
- 66% are in the inner firth and 34% in the outer;
- 81% of the sector's employees are male;
- More than half are involved in the building and repairing of ships or boats; and
- 52% of Strathclyde's employees in this sector are found in Firth of Clyde wards.

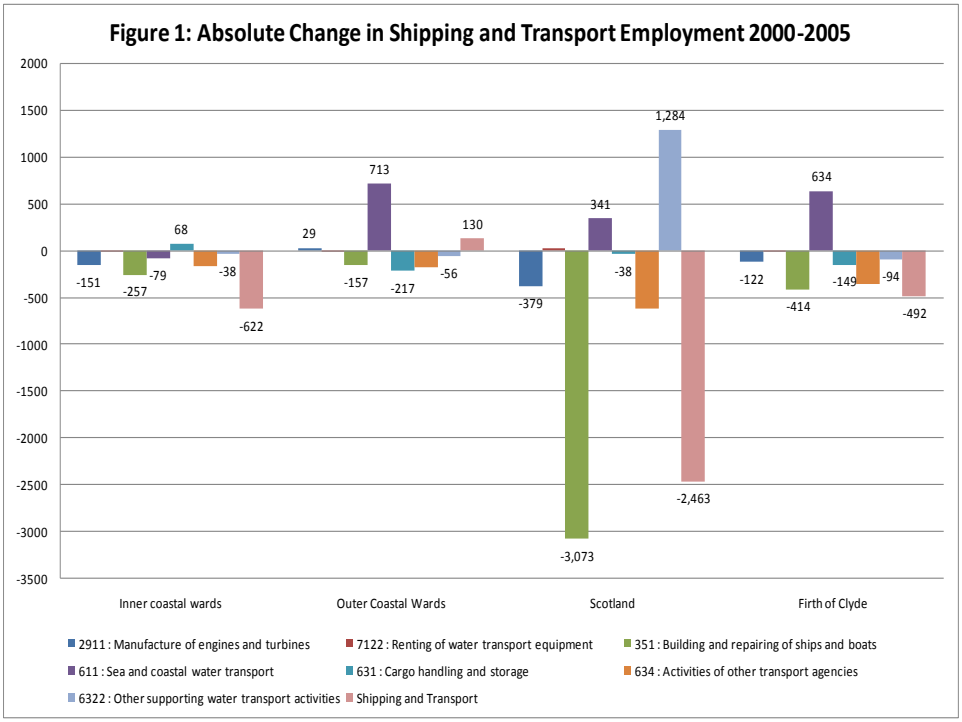
Table 3.25: Shipping and Transport Employment by Gender and Area, 2005

	Inner	Outer	Scotland
Male			
Shipping and Transport	3,279	1,599	19,952
Manufacture of engines and turbines, except aircraft, vehicle and cycle engines	28	25	1,016
Renting of water transport equipment	1	1	45
Building and repairing of ships and boats	2,630	376	5,015
Sea and coastal water transport	105	558	1,792
Cargo handling and storage	229	195	5,464
Activities of other transport agencies	218	32	2,813
Other supporting water transport activities	69	412	3,807
Female			
Shipping and Transport	506	394	4,989
Manufacture of engines and turbines, except aircraft, vehicle and cycle engines	3	4	161
Renting of water transport equipment	0	1	37
Building and repairing of ships and boats	223	48	502
Sea and coastal water transport	41	182	653
Cargo handling and storage	87	41	1,589
Activities of other transport agencies	123	21	1,403
Other supporting water transport activities	29	96	643
Total			
Shipping and Transport	3,785	1,992	24,941
Manufacture of engines and turbines, except aircraft, vehicle and cycle engines	31	29	1,177
Renting of water transport equipment	1	2	82
Building and repairing of ships and boats	2,853	424	5,516
Sea and coastal water transport	146	740	2,446
Cargo handling and storage	316	235	7,053
Activities of other transport agencies	340	54	4,216
Other supporting water transport activities	98	508	4,450

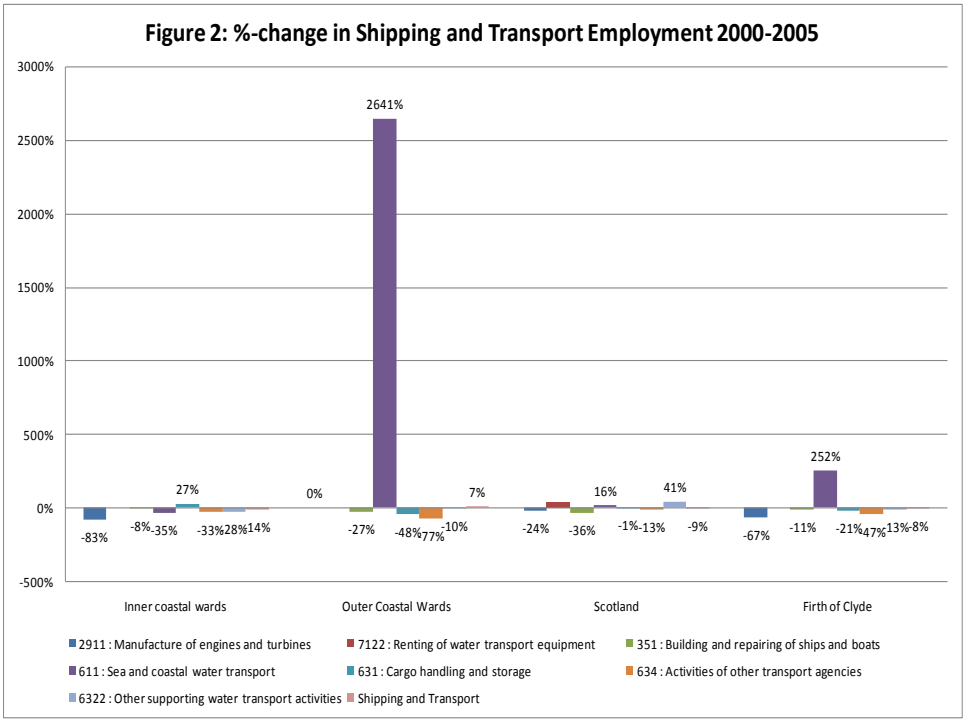
Source: ABI

Figures 1 & 2, over, depict the %-age and absolute change in shipping and transport employment from 2000-2005. They show that:

- The sector has suffered a greater absolute decline in Scotland than in the Coastal Firth but the %-age change has been almost the same;
- Absolute and %-age growth in the outer wards has been outweighed by contraction along the inner firth; and
- %-age change in sea and coastal water transport appears significant as it has increased by 2641% in the outer wards. In absolute terms it is also quite high as 713 jobs have been created in this area. The reason for this is unclear and the increase occurred after 2003. It is possible that this is a sampling error, a change to ABI questionnaires are completed by a company(ies) or relates to a change in port of registration for vessels and crews.



Source: ABI



Source: ABI

3.8.3 Workplaces / Business Base

Table 3.26 reports shipping and Transport workplaces[24] by area for 2005.

Table 3.26: Shipping and Transport Workplaces, 2005

	Inner	Outer	Scotland
Shipping and Transport	73	94	1,232
Manufacture of engines and turbines, except aircraft, vehicle and cycle engines	1	4	42
Renting of water transport equipment	1	2	33
Building and repairing of ships and boats	8	26	142
Sea and coastal water transport	19	14	167
Cargo handling and storage	21	15	383
Activities of other transport agencies	20	6	297
Other supporting water transport activities	3	27	168

Source: ABI

The Table shows that:

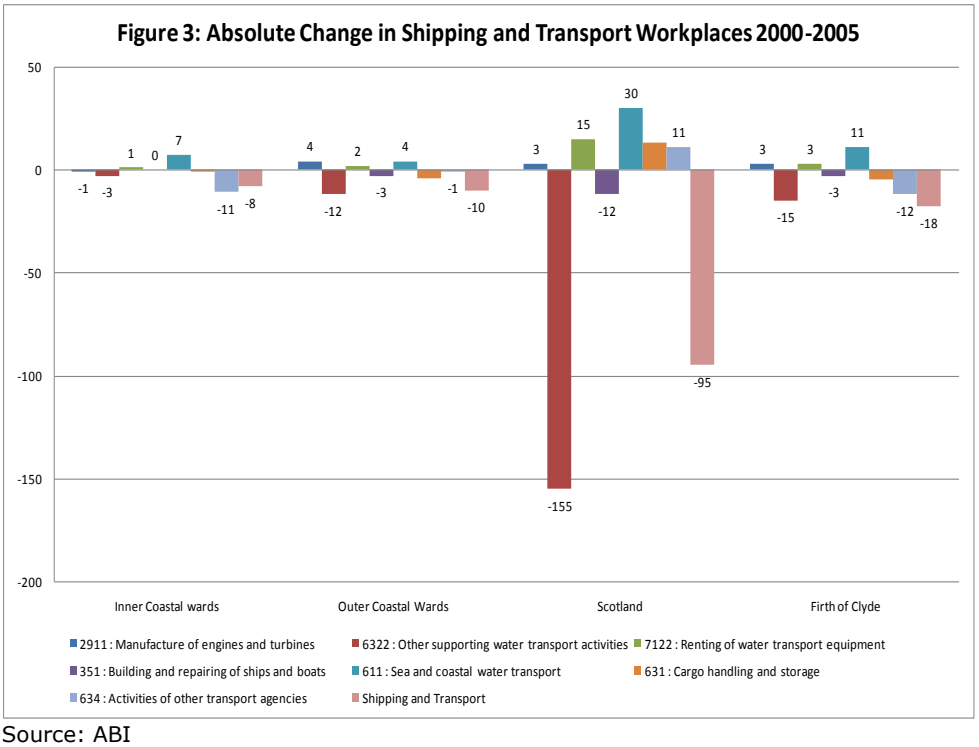
- 167 shipping and transport workplaces are found on the Firth;

[24] ABI workplaces are generally accepted as a proxy for the business base of an area.

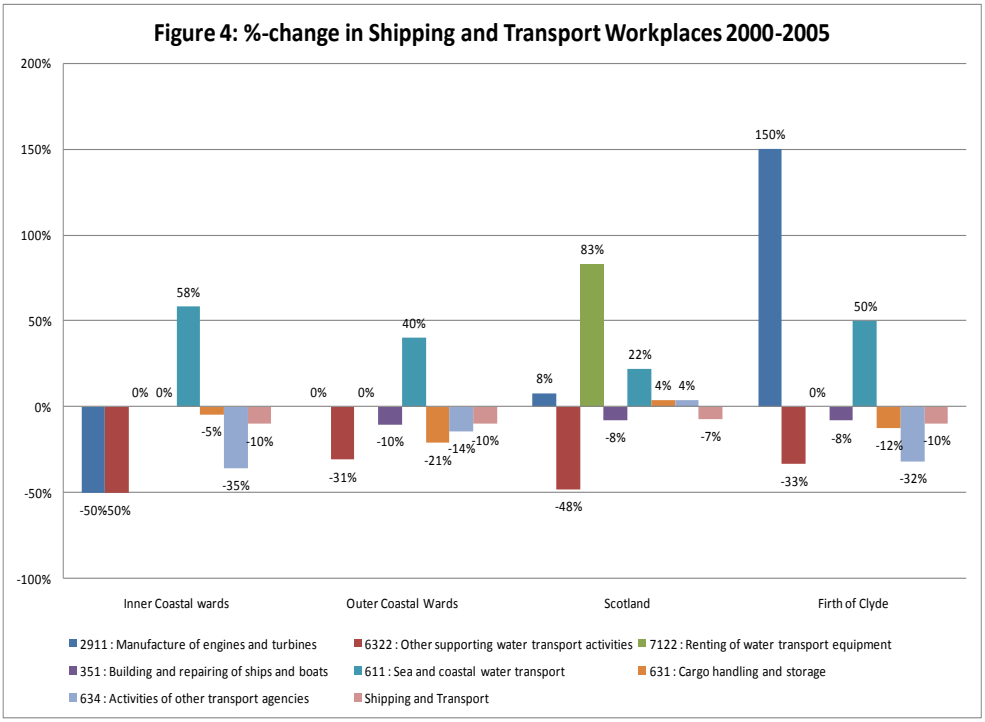
- 44% are located in the inner firth and 56% in the outer;
- Only 20% are concerned with the building and repair of ships or boats. As these businesses employ more than half the sector's workforce on the Firth, it suggests these are major employers; and
- 14% of Scotland's shipping and transport workplaces are found on the Firth coast.

Figures 3&4, over, show the absolute and %-age change in Shipping and Transport workplaces from 2000 – 2005. They show that:

- The number of workplaces has fallen more in Scotland than on the Firth coast which is the same as change in employment, but in %-age terms the loss of businesses on the Firth (10%) was greater;
- The absolute loss is greater in outer wards than inner wards but the same in %-age terms; and
- %-age change in manufacture of engines and turbines in the Firth of Clyde appears significant at 150%, however in absolute terms it is marginal as only three new businesses have been established.



Source: ABI



Source: ABI

3.8.4 Turnover

Table 3.27 reports change in turnover by sector, sub-sector and area 2000 – 2005. Calculations are based on turnover per employee[25] of:

- £50,800 in 2000; and
- £96,200 in 2005.

Table 3.27: Turnover (£m)

	Inner		Outer		Scotland	
	2000	2005	2000	2005	2000	2005
Shipping and Transport	223.9	364.1	94.6	191.6	1392.1	2399.3
Manufacture of engines and turbines etc	9.2	3.0	0	2.8	79.0	113.2
Renting of water transport equipment	0	0.9	0	0.2	3.0	7.9
Building and repairing of ships and boats	158.0	274.5	29.5	40.8	436.3	530.6
Sea and coastal water transport	11.4	14.0	1.4	71.2	106.9	235.3
Cargo handling and storage	12.6	30.4	23.0	22.6	360.2	678.5
Activities of other transport agencies	25.8	32.7	12.1	5.2	245.7	405.6
Other supporting water transport activities	6.9	9.4	28.7	48.9	160.8	428.1

Source: Scottish Annual Business Statistics

[25] The Scottish Government publish annual statistics on the financial performance of

The Table shows that:

- Shipping and Transport on the Firth of Clyde Coast totalled £555.7m in 2005;
- This is 23% of sector turnover in Scotland; and
- Turnover in the Firth area is up £237.2m on 2000 and there has been a significant increase in turnover per employee to counteract the downturn in employment.

3.8.5 GVA

Table 3.28 reports change in GVA by sector, sub-sector and area 2000 – 2005. Calculations are based on GVA per employee[3] of:

- £21,600 in 2000; and
- £33,900 in 2005.

Table 3.28: GVA (£M)

	Inner		Outer		Scotland	
	2000	2005	2000	2005	2000	2005
Shipping and Transport	95.2	128.3	40.2	67.5	591.9	845.5
Manufacture of engines and turbines, except aircraft, vehicle and cycle engines	3.9	1.1	0	0.9	33.6	39.9
Renting of water transport equipment	0	0.03	0	0.06	1.3	2.8
Building and repairing of ships and boats	67.2	96.7	12.5	14.4	185.5	187.0
Sea and coastal water transport	4.9	4.9	0.6	25.1	45.5	82.9
Cargo handling and storage	5.3	10.7	9.8	8.0	153.2	239.1
Activities of other transport agencies	11.0	11.5	5.1	1.8	104.5	142.9
Other supporting water transport activities	2.9	3.3	12.2	17.2	68.4	150.9

Source: Scottish Annual Business Statistics

The Table shows that:

- Shipping and Transport on the Firth of Clyde Coast GVA totalled £195.8m in 2005;
- This is 23% of sector GVA in Scotland; and
- GVA in the Firth area is up £60.4m on 2000 and there has been an increase in productivity per employee.

3.8.6 Sector Review

This sector is a broad one and covers three distinct but related industries: shipbuilding and repair; passenger and freight transportation; and port operations. Some of the key issues facing these sectors are:

- Plans for a new deepwater container facility at Hunterston;
- Growth in cruise activity at Greenock's Ocean Terminal;
- Investment in bulk handling facilities in King George V dock in Glasgow;
- Property development on Brownfield land along the Clyde Waterfront;
- Decline of shipbuilding, the reliance on warship building, the need to diversify and maintain a skills base;
- Upgrading and replacement of vessels serving ferry routes across the Firth;
- Continuing uncertainty and distraction caused by the requirement to tender for Clyde and Hebridean ferry services.

3.8.7 Conclusions

The following conclusions can be drawn from this profile:

- Shipping and transport is not a major employer across the Firth of Clyde, employing less than 2% of the labour force in both the inner and outer firth;
- Some businesses are significant local employers, however, especially in shipbuilding, which dominates the sector;
- Shipbuilding is highly dependent on one main employer operating in one particular market;
- Prospects for growth in international sea freight traffic are good;
- Ferry services appear secure but there is continued uncertainty over how they will be operated and how;
- There is considerable scope for redevelopment of brownfield land along the Clyde Waterfront.

3.9 Overall Conclusions

Table 3.29 sets out an overview of economic activity within the key marine related sectors described earlier.

In undertaking this analysis we have recognised the difficulty in relating economic activity purely to the marine related environment. For example, while some of the identified civil engineering activity will relate to the marine related activities, it will obviously included much non marine related activities. In addition, the degree of linkages will be different between the inner and outer areas. Therefore, it is likely that he marine related environment will have a stronger claim on tourism and recreation activity in the outer areas compared to the core which will have stronger linkages in other areas.

We have therefore allocated an attribution factor to each of the sub sectors and each of the areas to try and identify how much economic activity can be related to and has strong links with, the marine related environment.

Table 3.29 Economic impacts of Marine Environment in Firth of Clyde

Employment	Inner	Allocation	Total Inner	Outer	Allocation	Total outer	FoC	Total
Energy	945	1%	9	790	5%	40	1,735	49
Fish Farming	0	100%	0	265	100%	265	265	265
Fishing	96	100%	96	552	100%	552	648	648
Construction related	1,991	5%	100	1,830	10%	183	3,821	283
Defence	1,439	50%	720	2,717	90%	2,445	4,156	3,165
Tourism Recreation	17,729	10%	1,773	13,557	25%	3,389	31,286	5,162
Shipping Transport	3,785	80%	3,028	1,992	90%	1,793	5,777	4,821
Total	25,985		5,725	21,703		8,667	47,688	14,392
Businesses	Inner	Allocation	Total Inner	Outer	Allocation	Total outer	FoC	Total
Energy	16	1%	0	15	5%	1	31	1
Fish Farming	0	100%	0	16	100%	16	16	16
Fishing	15	100%	15	168	100%	168	183	183
Construction related	126	5%	6	196	10%	20	322	26
Defence	5	50%	3	10	90%	9	15	12
Tourism Recreation	1,226	10%	123	1,370	25%	343	2,596	465
Shipping Transport	73	80%	58	84	90%	76	157	134
Total	1,461		205	1,859		631	3,320	836
GVA Output (£Ms)	Inner	Allocation	Total Inner	Outer	Allocation	Total outer	FoC	Total
Energy	£46	1%	£0	£39	5%	£2	£85	£2
Fish Farming	£0	100%	£0	£14	100%	£14	£14	£14
Fishing	£5	100%	£5	£29	100%	£29	£34	£34
Construction related	£81	5%	£4	£53	10%	£5	£134	£9
Defence	£42	50%	£21	£81	90%	£73	£123	£94
Tourism Recreation	£322	10%	£32	£246	25%	£62	£568	£94
Shipping Transport	£128	80%	£102	£67	90%	£60	£195	£163
Total	£624		£185	£529		£245	£1,153	£410

The analysis shows that the sub sectors with the greatest absolute reliance on the marine environment are tourism; defence and shipping while those with the greatest total reliance are fishing and fish farming.

The above analysis shows that the Firth of Clyde marine environment directly supports more 14,000 jobs in over 800 businesses. In turn this generates more than £400 million for the Scottish economy every year.

However, these figures should be treated with caution as they are based on proxy estimates based on an attribution factor which based solely on personal opinion. It does, however, offer an opportunity for discussion and debate as to the importance of the Firth of Clyde to the regional, economy.

Based on these figures we would estimate that marine related economic activity accounts for around 4.5% of all economic activity in the Firth of Clyde.

4. Settlement Analysis

4.1 Introduction

This Chapter considers the individual settlements within the Firth of Clyde and provides a brief overview on each location. This will cover:

- population;
- employment by broad industrial group and key sector;
- business base by broad industrial group and key sector;
- unemployment;
- turnover;
- GVA; and
- Port / Maritime related activity

In making comparisons between 2000 and 2005 is necessary to use two different definitions of sub-Unitary Authority geographies. For 2000 data definitions are based on frozen 1991 wards. For 2005 definitions are based on 2003 CAS wards. Inevitably this means discontinuities for some geographies and makes a direct like for like comparison impossible. Findings should be seen as indicative rather than absolute. Extreme changes in data may be as much a function of a boundary changes as the opening or closing of new businesses.

4.2 Ardrossan, Saltcoats & Stevenston

4.2.1 Introduction

This paper presents a profile of Ardrossan, Saltcoats and Stevenston – the Three Touns - a key settlement area on the Firth of Clyde.

Three Touns are defined by the following 1991 or 2003 Census Area Statistic (CAS) wards:

- 1991 frozen ward
  - 78UH25 Ardrossan North
  - 78UH24 Ardrossan South
  - 78UH21 Saltcoats East
  - 78UH23 Saltcoats North
  - 78UH22 South Beach
  - 78UH14 Stevenston North
  - 78UH15 Stevenston South; and
- 2003 CAS ward
  - 22C24 : Ardrossan North
  - 22C23 : Ardrossan South
  - 22C20 : Saltcoats East
  - 22C22 : Saltcoats North
  - 22C21 : South Beach
  - 22C13 : Stevenston North
  - 22C14 : Stevenston South

4.2.2 Population

Table 4.1 reports the change in population of Three Touns from the 1991 Census to 2001 Census

Table 4.1: Three Touns Population by Age Group

	Children		Working Age (59/64)		Retired		All people
2001							
People	6714	21%	19275	60%	5912	19%	31901
Males	3395	23%	9567	64%	1982	13%	14944
Females	3319	20%	9708	57%	3930	23%	16957
1991 People	7368	22%	20166	61%	5643	17%	33177

Source: 1991 Census, 2001 Census

The Table shows that:

- The population has fallen by 4%
- The proportion of children is slightly down
- The working age population is down by 1%
- The retired population has increased by 2%.

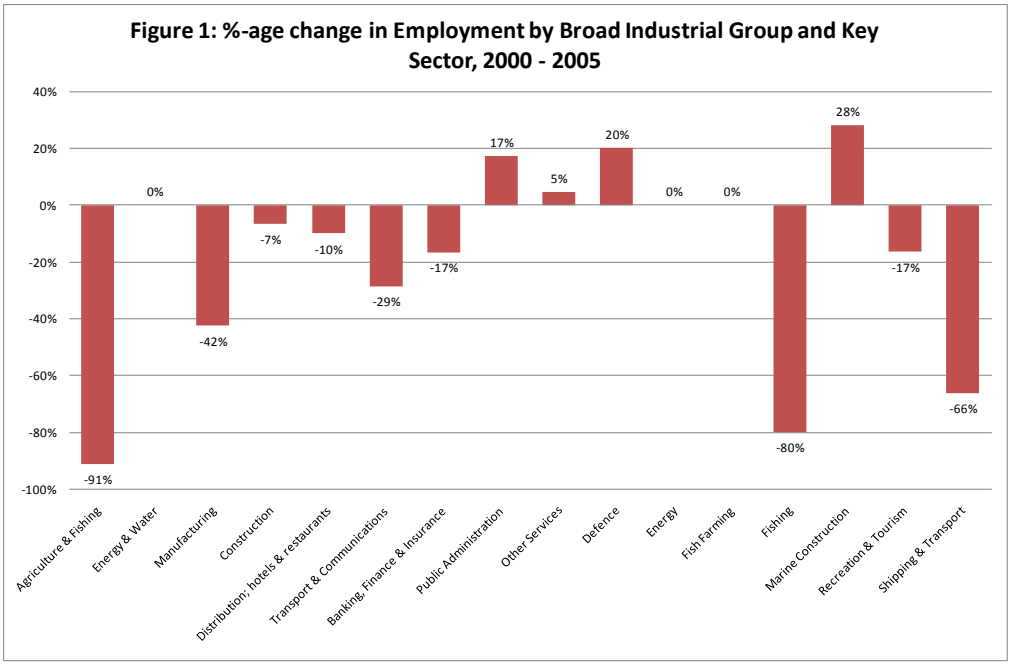
4.2.3 Employment

Table 4.2 reports the change in employment in Three Touns from 2000 – 2005 by broad industrial group and by key sector. Figure 1, over, shows the %-age change in employment over this period.

Table 4.2: Three Touns Employment change 2000 - 2005

	2000	2005	Change
Agriculture & Fishing	23	2	-21
Energy & Water	8	8	0
Manufacturing	1,125	648	-477
Construction	682	637	-45
Distribution; hotels & restaurants	2,303	2,072	-231
Transport & Communications	713	509	-204
Banking, Finance & Insurance	913	761	-152
Public Administration	2,278	2,671	393
Other Services	550	575	25
Defence	5	6	1
Energy	0	1	1
Fish Farming	0	0	0
Fishing	30	6	-24
Marine Construction	232	297	65
Recreation & Tourism	1,151	960	-191
Shipping & Transport	80	27	-53

- Public administration replaces distribution/hotels as the most important employment group in Three Touns with 34% of all employees;
- Distribution/hotels is next with 26%;
- total employment fell by 8% (-712 jobs)
- there was significant decline in manufacturing, distribution and transport;
- only recreation and tourism of the key sectors is an important employer;
- there was a net loss of 13% (-201 jobs) from the key sectors.

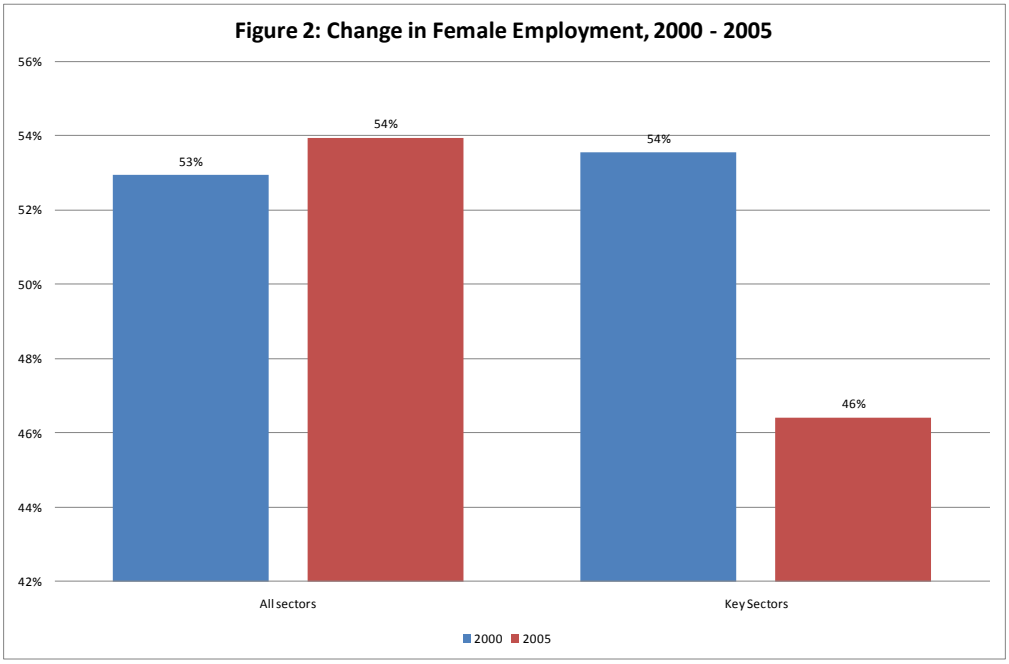


Source: ABI

Figure 2 reports the change in female employment.

It shows that:

- females still make up a majority of Three Toun's employees
- females have not suffered from overall employment decline as much as males;
- in key sectors females have suffered more than males.



Source: ABI

4.2.4 Workplaces / Business Base

Table 4.3 reports the change in the workplace / business[26] base in Three Touns from 2000 – 2005. Figure 3 shows the %-age change in this base.

Table 4.3: Three Touns Business Base change 2000 - 2005

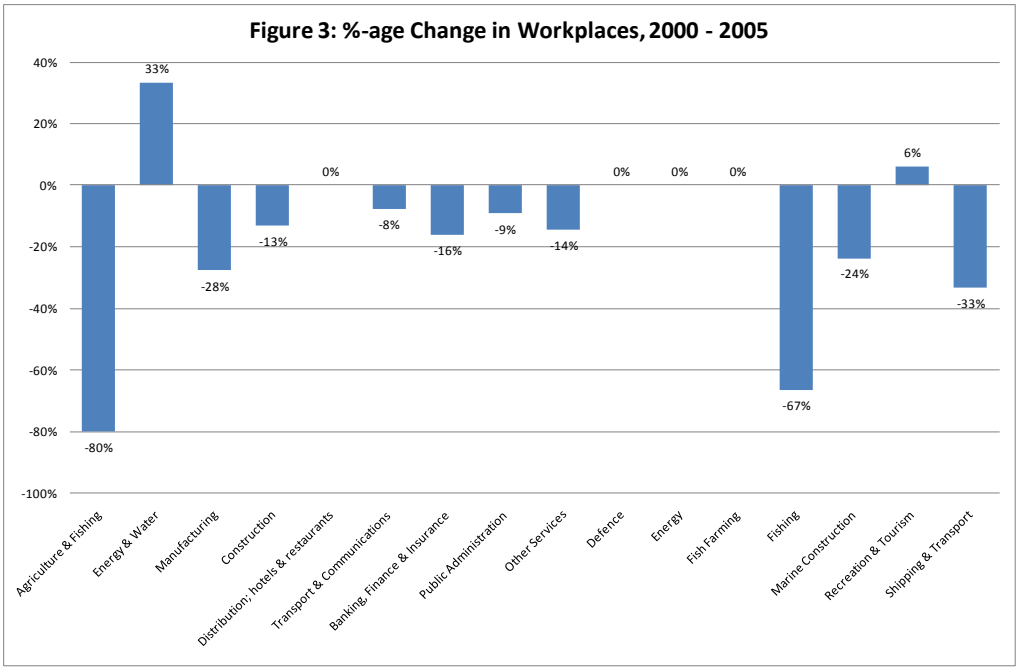
	2000	2005	Change
Agriculture & Fishing	10	2	-8
Energy & Water	3	4	1
Manufacturing	36	26	-10
Construction	76	66	-10
Distribution; hotels & restaurants	287	287	0
Transport & Communications	39	36	-3
Banking, Finance & Insurance	173	145	-28
Public Administration	130	118	-12
Other Services	83	71	-12
Defence	1	1	0
Energy	0	1	1
Fish Farming	0	0	0
Fishing	12	4	-8
Marine Construction	21	16	-5
Recreation & Tourism	116	123	7
Shipping & Transport	6	4	-2

Source: ABI

[26] ABI workplaces are widely accepted as a proxy for the business base.

The Table data show:

- Distribution / hotels is unchanged as the largest business grouping (38%);
- Banking / finance is next with 19% and public admin with 16%;
- The business base shrank 82 units (-10%);
- Only energy and water recorded any growth (1);
- Only recreation and tourism is significant of the key sectors;
- Growth in recreation & tourism gave a net loss of 7 units for the key sectors.



Source: ABI

4.2.5 Unemployment

Table 4.4 reports the absolute change in claimant count on Three Touns from September 2004 – 2005. Figure 4 shows the change in unemployment rates over the same period.

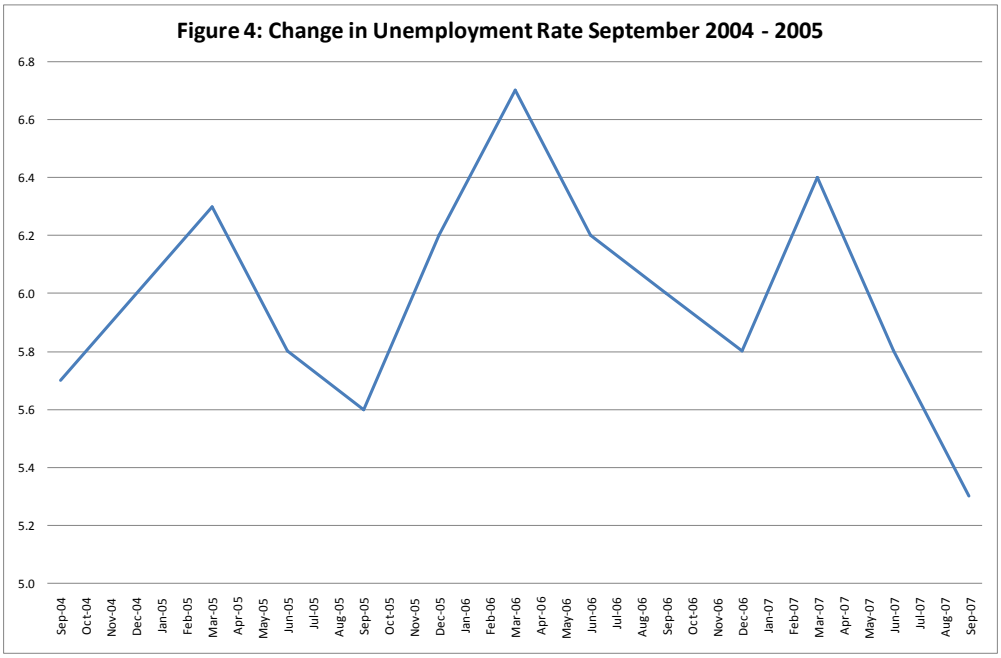
Table 4.4: Absolute Change in Unemployment September 2004 - 2007

2004	1009
2005	1076
2006	1022
2007	16
Change	-77
% Change	-7%

Source: Claimant Count

The data show that:

- Unemployment has fallen over the three years
- The absolute and %-age change is small
- From a high of 6.7% (1290) in March 06 unemployment is now at its lowest point of the last three years 5.3% (1022).



Source: Claimant Count

4.2.6 Turnover

Table 4.5 reports turnover change by broad industrial group and key sector on Three Touns from 2000 – 2005.

Table 4.5: Three Touns Turnover change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	% Change
Agriculture & Fishing	90,999	2.1	111,026	0.2	-1.9	-89
Energy & Water	90,999	0.7	111,026	0.9	0.2	22
Manufacturing	137,310	154.5	149,693	97.0	-57.5	-37
Construction	73,596	50.2	103,312	65.8	15.6	31
Distribution; hotels & restaurants	65,696	151.3	81,676	169.2	17.9	12
Transport & Communications	65,696	46.8	81,676	41.6	-5.3	-11
Banking, Finance & Insurance	55,091	50.3	93,359	71.0	20.7	41
Public Administration	90,999	207.3	111,026	296.6	89.3	43
Other Services	65,696	36.1	81,676	47.0	10.8	30
Defence	65696	0.3	81676	0.5	0.2	49
Energy	90999	0.0	111026	0.1	0.1	-
Fish Farming	146612	0.0	106659	0.0	0.0	-
Fishing	146612	4.4	106659	0.6	-3.8	-85
Marine Construction	73,596	17.1	103312	30.7	13.6	80
Recreation & Tourism	35,900	41.3	56900	54.6	13.3	32
Shipping & Transport	50800	4.1	96200	2.6	-1.5	-36
Total Key Sectors		67.2		89.1	22.6	33
Total all employees		699.4		789.3	89.9	13

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: Turnover data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

The Table shows:

- Despite falling employment some groups and sectors show an increase in turnover;
- Increases are generally greater than the %-age change in employment due to changes in turnover / employee

- Key sectors show increases in turnover despite reduced levels of employment due to increases in turnover/employee;

- Key sectors rose from 10% of total turnover in 2000 to 11% in 2005

4.2.7 GVA

Table 4.6 reports GVA data for Three Touns from 2000 – 2005 by broad industrial group and key sector.

Table 4.6: Three Touns GVA change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	% Change
Agriculture & Fishing	32,093	0.7	44,562	0.1	-0.6	-88
Energy & Water	32,093	0.3	44,562	0.4	0.1	39
Manufacturing	37,816	42.5	49,590	32.1	-10.4	-24
Construction	29,010	19.8	40,761	26.0	6.2	31
Distribution; hotels & restaurants	21,680	49.9	29,747	61.6	11.7	23
Transport & Communications	21,680	15.5	29,747	15.1	-0.3	-2
Banking, Finance & Insurance	32,963	30.1	38,547	29.3	-0.8	-3
Public Administration	32,093	73.1	44,562	119.0	45.9	63
Other Services	21,680	11.9	29,747	17.1	5.2	43
Defence	21,680	0.1	29,747	0.2	0.1	65
Energy	32,093	0.0	44,562	0.0	0.0	-
Fish Farming	58,492	0.0	52,347	0.0	0.0	-
Fishing	58,492	1.8	52,347	0.3	-1.4	-82
Marine Construction	29,010	6.7	40,761	12.1	5.4	80
Recreation & Tourism	15,200	17.5	18,200	17.5	0.0	0
Shipping & Transport	21,600	1.7	33,900	0.9	-0.8	-47
Total Key Sectors		27.8		31.0	3.2	12
Total all employees	-	243.8	-	300.8	56.9	23

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: GVA data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

The data shows that:

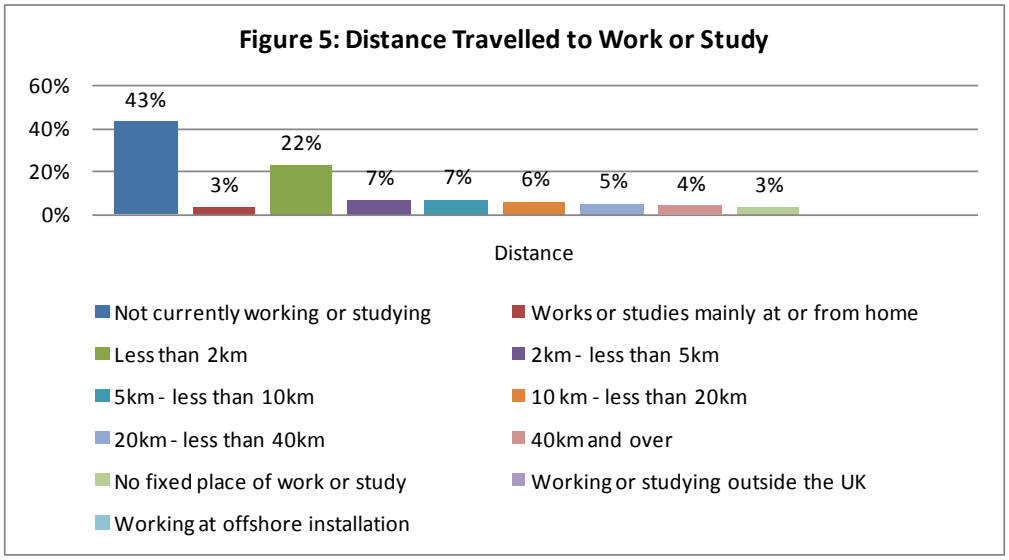
- Despite falling employment some groups still show an increase in GVA;

- Increases are greater than the %-age changes in employment due to the greater change in GVA/employee;
- Key sectors show an increase in GVA despite reductions in employment due to increase in GVA/employee. Fishing is an exception to this;
- Key sectors have fallen from contributing 11% of GVA in 2000 to contributing 10% in 2005.

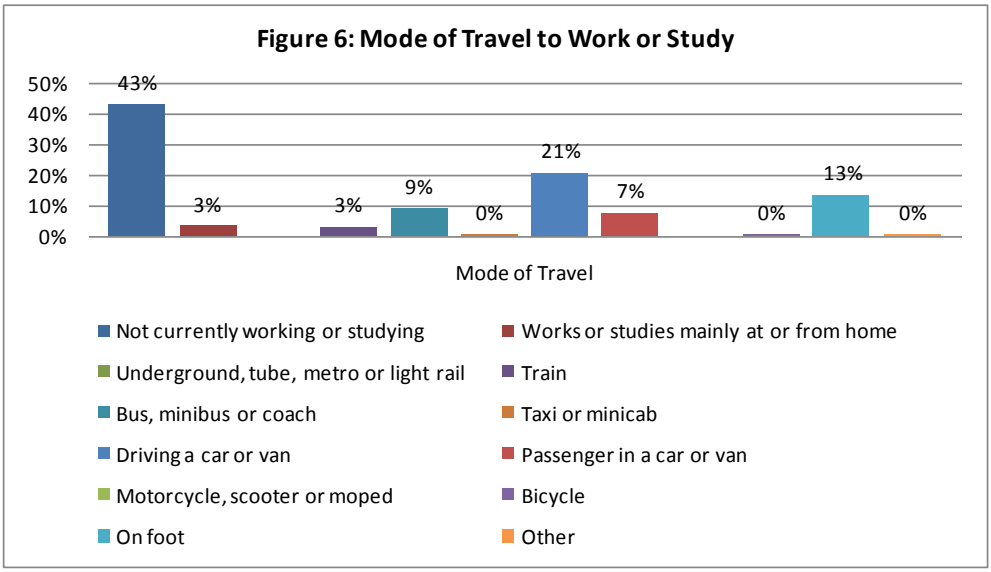
4.2.8 Marine / Port Related Activities

Commuting

Figures 5&6 show the mode and distance reported by those who normally travelled to a place of work or study on Census Day 2001.



Source: 2001 Census



Source: 2001 Census

The Figures show that in 2001:

- 43% of the resident population did not work or study;
- 39% did so at or within 10km of home;
- 9% travelled more than 20km to work or study;
- 28% did so as driver or passenger in a car, taxi or van.

Fish Landings

Table 4.7 reports fish landings by volume and value for 2000 and 2006.

Table 4.7: Fish landings on Troon & Saltcoats by Volume and Value 2000 - 06

	Volume (tonnage)	Value (£)
2000	2436.7	2,956,000
2006	2310.2	4,140,629
Change	-126.5	1,184,629

Source: Scottish Fisheries Statistics 2006.
Note: Landings are not necessarily made by vessels at their home port or harbour. Troon and Saltcoats are considered as one "creek", the lowest level of disaggregation for which official statistics are available.

The data shows that:

- Live weight tonnage landed fell by 5%; but

- The value of fish landings grew by 40%

Boating & Sailing

Table 4.8 reports the number of berths and moorings available in Brodick Harbour and the Firth of Clyde.

Table 4.8: Available Berths and Moorings

	Current		Proposed	
	Three Touns	Clyde	Three Touns	Clyde
Berths	0	2674	200	5376
Moorings	0	26	0	163
Total	0	2700	200	5539

Source: Clyde Sailing Study

It shows that:

- Three Touns currently has no official facilities for touring boats;
- Significant development of this kind is planned.

Tourism

Three Touns has not attractions ranked among the Top 20 paid or free attractions in Scotland in 2005 or in the most visited attractions in Ayrshire.

Ferry Activity

Table 4.9: reports change in traffic on the Ardrossan – Brodick ferry route, the main ferry service between Arran and the mainland.

Table 4.9: Ferry Traffic Ardrossan – Brodick 2000 - 2005

Arran	2000	2005	Change	% change
Passengers	626600	742600	116000	19%
Cars	100800	131000	30100	30%
Commercial & buses	11400	12200	800	7%
Clyde				
Passengers	3013200	3256000	242800	8%
Cars	567800	636700	68900	12%
Commercial & buses	50400	51200	800	2%

Source: Scottish Government Water Transport Statistics 2006

The Table shows that:

- There has been significant growth in ferry traffic to/from Ardrossan;
- This growth was more than twice that for the whole Firth of Clyde;

- In 2005 Ardrossan – Brodick accounted for
  - 23% of Clyde passenger traffic
  - 21% of car traffic
  - 24% of commercial vehicle / bus traffic

4.2.9 Change over Time and Potential Projects

The Three Towns have not historically engaged in marine activity. Ardrossan dock had been infilled by 1983 and the railway now only connected with the ferry port serving Arran year round and Isle of Man seasonally. Saltcoats described itself as "a holiday resort" as recently as 1975 when it was still popular with Glasgow Fair day-trippers. This has declined with easier access to cheap foreign travel, although there are fresh plans to regenerate the area along the former seafront promenades.

The key major project identified in the local plan is the regeneration of Ardrossan Harbour (also identified in the Structure Plan), with the potential for tourist facilities and retailing as well as improved access. 200 sailing berths are proposed as part of this regeneration. Ardrossan and Saltcoats promenades are also earmarked for development.

A subjective view of the changing influence of the marine environment on the Three Touns is presented in the graph below.

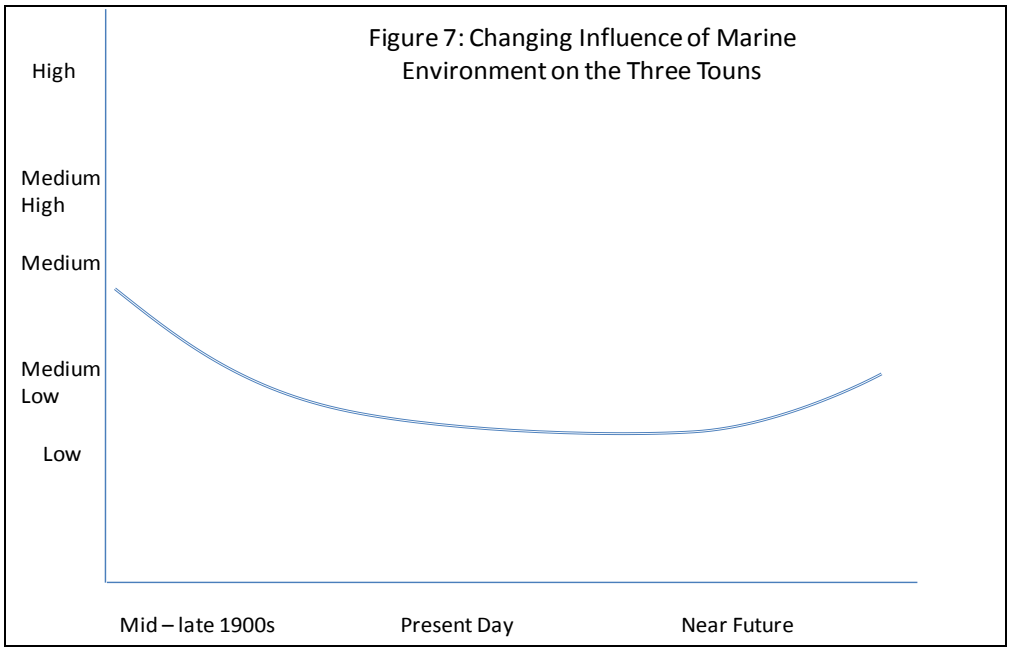


Figure 7: Changing Influence of Marine Environment on the Three Touns

The graph charts the decline of the commercial docks and day tripper holiday market, the continued presence and importance of the Arran ferry and then the potential redevelopment of the harbour and waterfront for leisure purposes.

4.2.10 Conclusions

The main conclusions from this profile are:

- Population decline is counter to the Firth and Strathclyde trends and also the growth levels found in the outer wards;
- The age profile of the population has increased – growth in the proportion retired residents at the expense of the child and working age population;
- Employment decline of 8% is below the Firth and Strathclyde average;
- Of the broad industrial groups, only public administration and other services record growth in employment;
- Of the key sectors only marine construction records growth – from 0 to 5. Decline in the recreation and tourism sector suggests decline within parts of the other services and distribution / hotels recorded sectors despite them showing no change or growth;
- Business base growth was also below regional averages;
- Unemployment has not fallen as much as the regional averages;
- Turnover and GVA change is largely driven by changes in productivity per employee. The contribution of key sectors has increased;
- Most residents work locally;
- The value of fish landings increased significantly despite a slight fall in live weight tonnage;
- Three Touns currently has no dedicated facilities for boating and sailing but significant development of this sort is planned;
- Three Touns has seen significant growth in ferry traffic on the main Ardrossan – Brodick route. This is a function of economic activity on Arran rather than the Three Touns area.
- The Three Touns has not shared fully in the economic growth seen elsewhere in Strathclyde.

The data analysis for Ardrossan / Three Touns is summarised in the SWOT analysis presented below.

STRENGTHS Ardrossan is ferry gateway to Arran and all three towns have fine views over to the Island Ardrossan Harbour regeneration has started successfully– high demand for housing	WEAKNESSES Low skilled and declining population Poor retailing and visual appearance
OPPORTUNITIES New housing development may assist with reversing population decline Irvine Bay URC regeneration	THREATS Requires change in perception to attract new residents and workers

4.3 Arran

4.3.1 Introduction

This paper presents a profile of Arran, a key settlement area on the Firth of Clyde.

Arran is defined by the following 1991 or 2003 Census Area Statistic (CAS) wards:

- 1991 frozen ward
  - 78UH30 Arran; and
- 2003 CAS ward
  - 22C30 : Arran

4.3.2 Population

Table 4.10 reports the change in population of Arran from the 1991 Census to 2001 Census

Table 4.10: Arran Population by Age Group

	Children		Working Age (59/64)		Retired		All people
				2001			
People	902	18%	2808	56%	1348	27%	5058
Males	470	19%	1491	61%	476	20%	2437
Females	432	16%	1317	50%	872	33%	2621
1991 People	815	18%	2535	56%	1157	26%	4507

Source: 1991 Census, 2001 Census

The Table shows that:

- The population has grown by 12%
- The proportion of children is the same
- The working age population is unchanged
- The retired population has increase slightly.

4.3.3 Employment

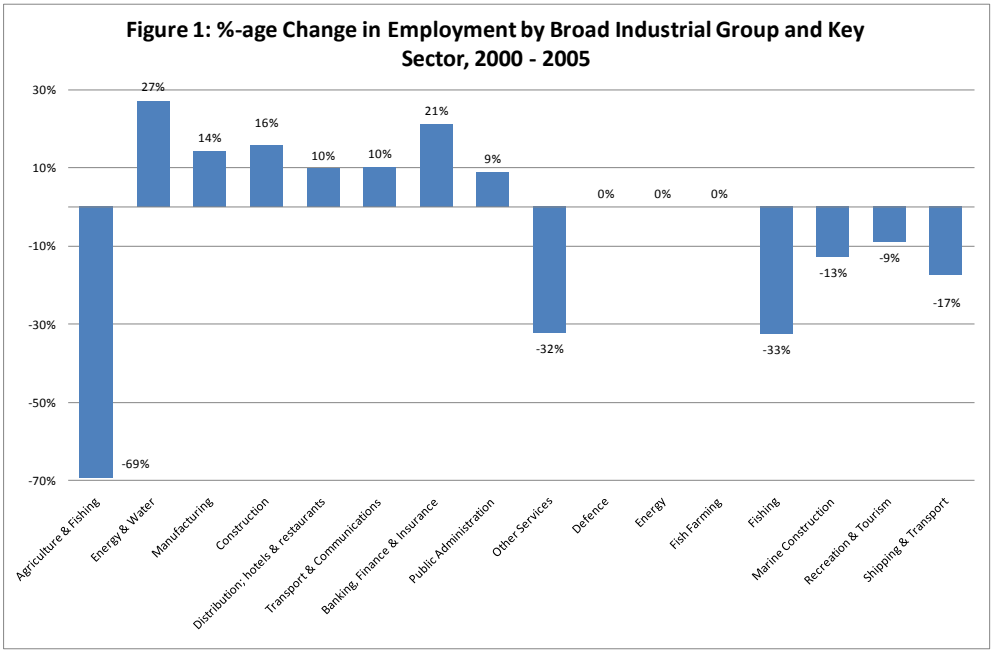
Table 4.11 reports the change in employment in Arran from 2000 – 2005 by broad industrial group and by key sector. Figure 1, over, shows the %-age change in employment over this period.

Table 4.11: Arran Employment change 2000 - 2005

	2000	2005	Change
Agriculture & Fishing	62	19	-43
Energy & Water	11	14	3
Manufacturing	146	167	21
Construction	138	160	22
Distribution; hotels & restaurants	581	638	57
Transport & Communications	128	141	13
Banking, Finance & Insurance	108	131	23
Public Administration	366	399	33
Other Services	127	86	-41
Defence	0	0	0
Energy	0	0	0
Fish Farming	0	5	5
Fishing	43	29	-14
Marine Construction	70	61	-9
Recreation & Tourism	464	422	-42
Shipping & Transport	23	19	-4

Source: ABI

- Distribution/hotels remain the most important employment group in Arran with 36% of all employees;
- public administration is next with 22%;
- total employment grew by 5% (88 jobs)
- there was significant decline in the primary industries and other services employment;
- only recreation and tourism of the key sectors is an important employer;
- there was a net loss of 11% (64 jobs) from the key sectors.

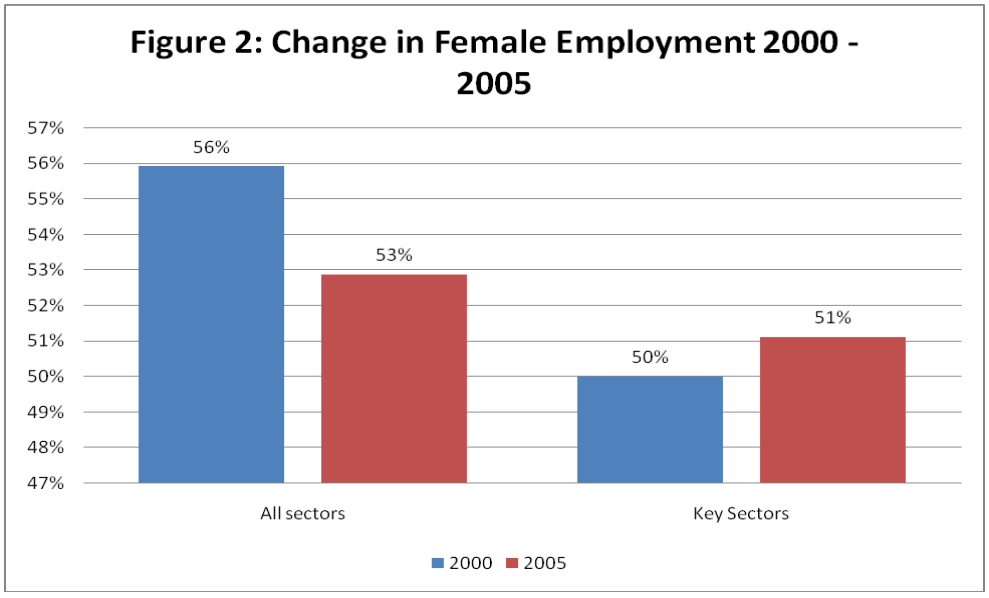


Source: ABI

Figure 2 reports the change in female employment.

It shows that:

- females still make up a majority of Arran's employees
- females have not benefitted from overall employment growth as much as males;
- in key sectors females have not suffered as much as males.



Source: ABI

4.3.4 Workplaces / Business Base

Table 4.12 reports the change in the workplace / business[27] base in Arran from 2000 – 2005. Figure 3 shows the %-age change in this base.

Table 4.12: Arran Business Base change 2000 - 2005

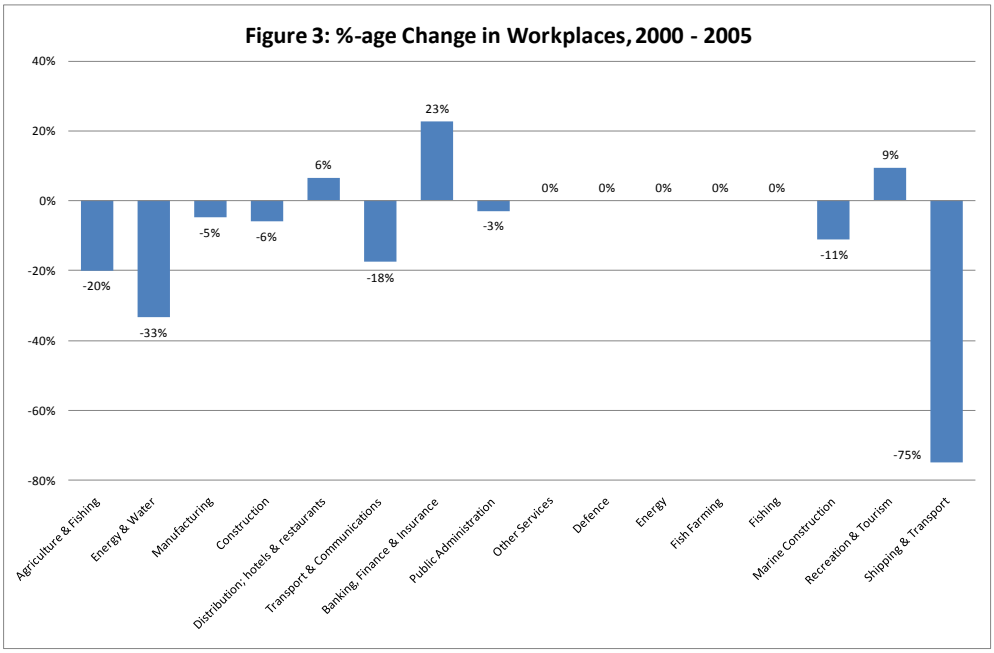
	2000	2005	Change
Agriculture & Fishing	10	8	-2
Energy & Water	6	4	-2
Manufacturing	21	20	-1
Construction	33	31	-2
Distribution; hotels & restaurants	108	115	7
Transport & Communications	17	14	-3
Banking, Finance & Insurance	31	38	7
Public Administration	34	33	-1
Other Services	23	23	0
Defence	0	0	0
Energy	0	0	0
Fish Farming	0	1	1
Fishing	6	6	0
Marine Construction	9	8	-1
Recreation & Tourism	54	59	5
Shipping & Transport	4	1	-3

Source: ABI

The Table data show:

- Distribution / hotels is still the largest business grouping (40%);
- Banking / finance is next with 13% and public admin with 11%;
- The business base grew by only 3 units (1%);
- Only distribution and banking recorded any growth;
- Only recreation and tourism is significant of the key sectors;
- Growth in recreation & tourism gave a net gain of 2 units for the key sectors.

[27] ABI workplaces are widely accepted as a proxy for the business base.



4.3.5 Unemployment

Table 4.13 reports the absolute change in claimant count on Arran from September 2004 – 2005. Figure 4 shows the change in unemployment rates over the same period.

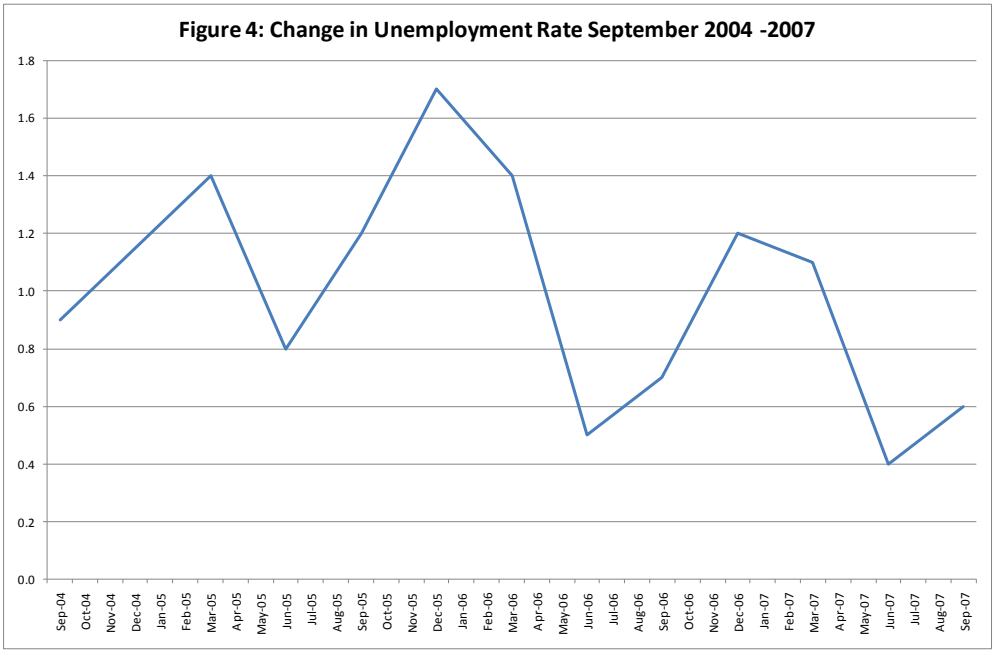
Table 4.13: Absolute Change in Unemployment September 2004 - 2007

2004	25
2005	34
2006	19
2007	16
Change	-9
% Change	-36%

Source: Claimant Count

The data show that:

- Unemployment has fallen by more than a third in three years
- The absolute change is small
- There is a pronounced seasonal unemployment cycle on Arran with peaks in Winter and troughs in Summer.



Source: Claimant Count

4.3.6 Turnover

Table 4.14 reports turnover change by broad industrial group and key sector on Arran from 2000 – 2005.

Table 4.14: Arran Turnover change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	
Agriculture & Fishing	90,999	5.6	111,026	2.1	-3.5	-63
Energy & Water	90,999	1.0	111,026	1.6	0.6	55
Manufacturing	137,310	20.0	149,693	25.0	5.0	25
Construction	73,596	10.2	103,312	16.5	6.4	63
Distribution; hotels & restaurants	65,696	38.2	81,676	52.1	13.9	37
Transport & Communications	65,696	8.4	81,676	11.5	3.1	37
Banking, Finance & Insurance	55,091	5.9	93,359	12.2	6.3	106
Public Administration	90,999	33.3	111,026	44.3	11.0	33
Other Services	65,696	8.3	81,676	7.0	-1.3	-16
Defence	65696	0.0	81676	0.0	0.0	-
Energy	90999	0.0	704872	0.0	0.0	-
Fish Farming	146612	0.0	106659	0.5	0.5	-
Fishing	146612	6.3	106659	3.1	-3.2	-51
Marine Construction	73,596	5.2	103312	6.3	1.2	22
Recreation & Tourism	35,900	16.7	56900	24.0	7.4	44
Shipping & Transport	50800	1.2	96200	1.8	0.7	56
Total Key Sectors		29.3		35.8	6.5	22
Total all employees		131.0		172.4	41.3	32

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: Turnover data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.
.

The Table shows:

- Increases in turnover in the same groups reporting increase in employment;
- Increases are generally greater than the %-age change in employment due to changes in turnover / employee
- Key sectors show increases in turnover despite reduced levels of employment due to increases in turnover/employee;
- Key sectors still fell from 22% of total turnover in 2000 to 21% in 2005

4.3.7 GVA

Table 4.15 reports GVA data for Arran from 2000 – 2005 by broad industrial group and key sector.

Table 4.15: Arran GVA change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	
Agriculture & Fishing	32,093	2.0	44,562	0.8	-1.1	-57
Energy & Water	32,093	0.4	44,562	0.6	0.3	77
Manufacturing	37,816	5.5	49,590	8.3	2.8	50
Construction	29,010	4.0	40,761	6.5	2.5	63
Distribution; hotels & restaurants	21,680	12.6	29,747	19.0	6.4	51
Transport & Communications	21,680	2.8	29,747	4.2	1.4	51
Banking, Finance & Insurance	32,963	3.6	38,547	5.0	1.5	42
Public Administration	32,093	11.7	44,562	17.8	6.0	51
Other Services	21,680	2.8	29,747	2.6	-0.2	-7
Defence	21,680	0.0	29,747	0.0	0.0	-
Energy	32,093	0.0	44,562	0.0	0.0	-
Fish Farming	58,492	0.0	52,347	0.3	0.3	-
Fishing	58,492	2.5	52,347	1.5	-1.0	-40
Marine Construction	29,010	2.0	40,761	2.5	0.5	22
Recreation & Tourism	15,200	7.1	18,200	7.7	0.6	9
Shipping & Transport	21,600	0.5	33,900	0.6	0.1	30
Total Key Sectors		12.1		12.6	0.5	4
Total all employees		45.3		64.8	19.5	43

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: GVA data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.
.

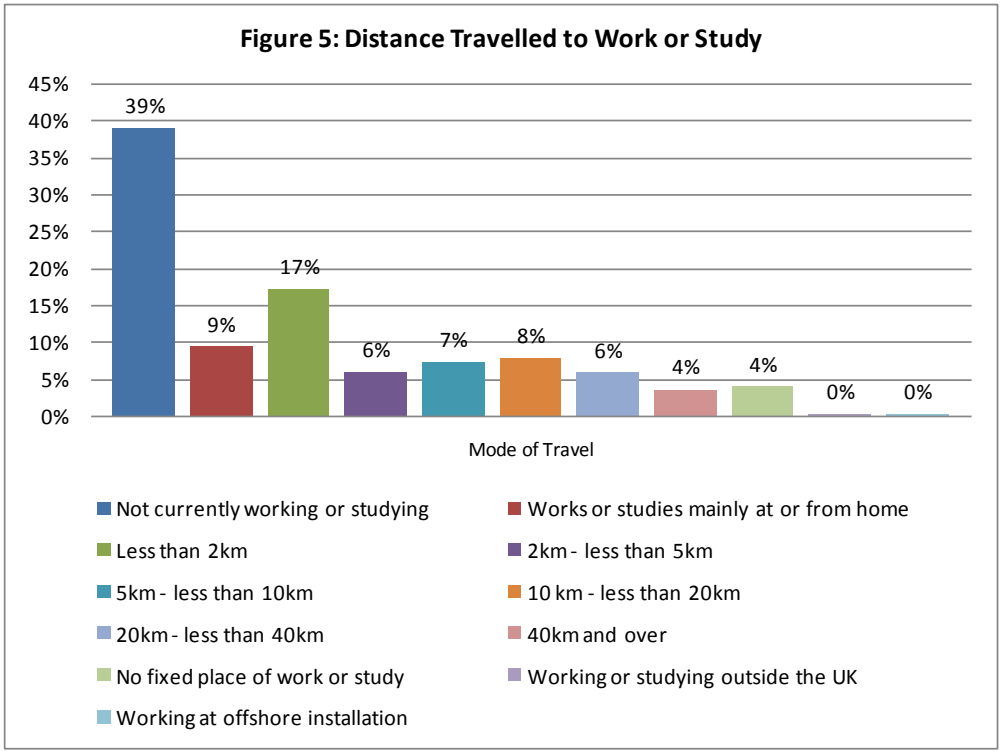
The data show that:

- GVA has increased in the same groups that showed an increase in employment;
- Increases are greater than the %-age changes in employment due to the greater change in GVA/employee;
- Key sectors show an increase in GVA despite reductions in employment due to increase in GVA/employee. Fishing is an exception to this;
- Key sectors have fallen from contributing 27% of Arran's GVA in 2000 to contributing 19% in 2005.

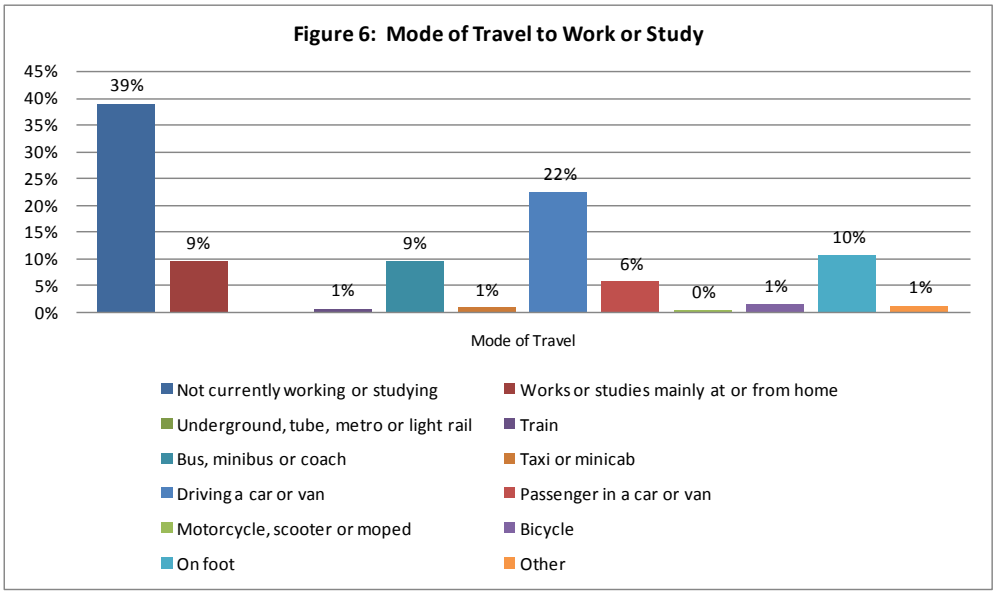
4.3.8 Marine / Port Related Activities

Commuting

Figures 4&5 show the mode and distance reported by those who normally travelled to a place of work or study on Census Day 2001.



Source: 2001 Census



Source: 2001 Census

The Figures show that in 2001:

- Almost 40% of the resident population did not work or study;
- 39% did so at or within 10km of home;
- 10% travelled more than 20km to work or study;
- 29% did so as driver or passenger in a car, taxi or van.

Fish Landings

Table 4.16 reports fish landings by volume and value for 2000 and 2006.

Table 4.16: Fish landings on Arran by Volume and Value 2000 - 06

	Volume (tonnage)	Value (£)
2000	6.68	16,763
2006	2.25	5,140
Change	-4.43	-11,620

Source: Scottish Fisheries Statistics 2006.
Note: Landings are not necessarily made by vessels at their home port or harbour.

The data shows that:

- Live weight tonnage landed fell by 33%; but
- The value of fish landings fell by 69%

Boating & Sailing

Table 4.17 reports the number of berths and moorings available in Brodick Harbour and the Firth of Clyde.

Table 4.17: Available Berths and Moorings

	Current		Proposed	
	Arran	Clyde	Arran	Clyde
Berths	0	2674	220	5376
Moorings	0	26	50	163
Total	0	2700	270	5539

Source: Clyde Sailing Study

It shows that:

- Arran currently has no official facilities for touring boats;
- Significant development of this kind is planned.

Tourism

Arran has not attractions ranked among the Top 20 paid or free attractions in Scotland in 2005. However, it does have the 7th and 8th ranked visitor attractions in the Ayrshire and Arran area:

- Brodick Country Park with 53104 visitors; and
- Brodick Castle with 36753.

Ferry Activity

Table 4.18: reports change in traffic on the Ardrossan – Brodick ferry route, e main ferry service between Arran and the mainland.

Table 4.18: Ferry Traffic Ardrossan – Brodick 2000 - 2005

Arran	2000	2005	Change	% change
Passengers	626600	742600	116000	19%
Cars	100800	131000	30100	30%
Commercial & buses	11400	12200	800	7%
Clyde				
Passengers	3013200	3256000	242800	8%
Cars	567800	636700	68900	12%
Commercial & buses	50400	51200	800	2%

Source: Scottish Government Water Transport Statistics 2006

The Table shows that:

- There has been significant growth in ferry traffic to/from Arran;
- This growth was more than twice that for the whole Firth of Clyde;
- In 2005 Ardrossan – Brodick accounted for
  - 23% of Clyde passenger traffic
  - 21% of car traffic
  - 24% of commercial vehicle / bus traffic

4.3.9 Change Over Time and Potential Projects

Arran has not changed significantly over the past 50 years in its relationship towards the marine environment. As an island, almost every activity is influenced directly or indirectly by the sea.

From 1950-69 steamers to Arran called only at Brodick pier and side-loading car ferries were introduced (from 1970 stern-loading). These larger, more practical vessels helped Arran grow as a holiday destination. As well as broadening the scope of tourist accommodation and attractions, other industries, such as toiletries manufacture and distilling, have grown and prospered on the island.

No major projects are identified in the Local Plan but there are proposals to develop nearly 300 sailing berths/moorings on Arran as there is currently no such provision.

A subjective view of the changing influence of the marine environment on Arran is presented in the graph below.

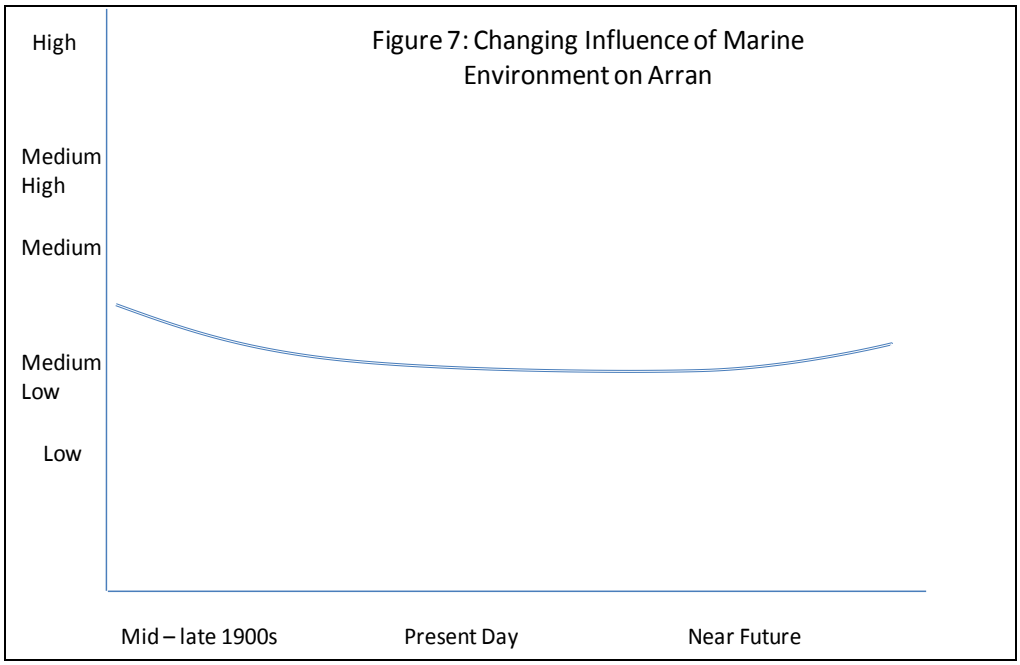


Figure 7: Changing Influence of Marine Environment on Arran

The graph charts the decline of steamer traffic to the island, to be replaced by modern ferries. Although island based, much of the employment activity on Arran is not directly influenced by the maritime environment, the exception being parts of the tourism and recreation sector. The potential upswing represents the significant sailing infrastructure proposed for Arran, which would significantly boost its watersports attractiveness.

4.3.10 Conclusions

The main conclusions from this profile are:

- Population growth is in excess of the Firth and Strathclyde trends and in line with the growth levels found in the outer wards;
- The age profile of the population has not changed as much as in other areas – slight growth in the proportion retired residents but a stable child and working age population;
- Employment growth of 5% is below the Firth and Strathclyde average;
- Of the broad industrial groups, only agriculture and other services record a decline in employment;
- Of the key sectors only fish farming records growth – from 0 to 5. Decline in the recreation and tourism sector may be linked to decline in the other services sector as distribution / hotels recorded some growth;
- Business base growth was also below regional averages and concentrated in distribution/hotels;
- Unemployment fell more sharply than the regional averages but in absolute terms the change was small – only 9 persons;
- Turnover and GVA change is largely driven by changes in productivity per employee. The contribution of key sectors has fallen;
- Most residents work locally;
- Arran currently has no dedicated facilities for boating and sailing but significant development of this sort is planned;
- Arran has seen significant growth in ferry traffic on the main Ardrossan – Brodick route. This is well in excess of business or employment growth so may well be linked to growth in tourism and recreational travel.

The data analysis for Ardrossan / Three Touns is summarised in the SWOT analysis presented below.

STRENGTHS	WEAKNESSES
Scenic location Good local services Access point to mainland via Ardrossan – Brodick ferry	Functional appearance of main town
OPPORTUNITIES	**THREATS**
Improve appearance entry to island Improve indoor facilities	Vulnerable to decline in tourism Ageing/retired population

4.4 Ayr and Prestwick

4.4.1 Introduction

Ayr and Prestwick are defined by the following 1991 or 2003 Census Area Statistic (CAS) wards:

- 1991 frozen wards
  - 78UR10 Alloway;
  - 78UR03 Braehead;
  - 78UR05 Craigie;
  - 78UR07 Forehill;
  - 78UR06 Fort;
  - 78UR01 Heathfield;
  - 78UR08 Holmston;
  - 78UR13 Kingcase;
  - 78UR02 Newton;
  - 78UR09 Seafield;
  - 78UR11 St Cuthberts;
  - 78UR12 St Nicholas;
  - 78UR04 Whitletts;
- 2003 CAS wards
  - 28C19 : Ayr Belmont;
  - 28C14 : Ayr Central;
  - 28C13 : Ayr Craigie;
  - 28C20 : Ayr Doonfoot and Seafield;
  - 28C17 : Ayr Forehill;
  - 28C15 : Ayr Fort;
  - 28C11 : Ayr Lochside;
  - 28C18 : Ayr Masonhill;
  - 28C10 : Ayr Newton;
  - 28C16 : Ayr Old Belmont;
  - 28C21 : Ayr Rozelle;
  - 28C12 : Ayr Whitletts;
  - 28C08 : Prestwick Kingcase;
  - 28C06 : Prestwick St Cuthbert's and Monkton;
  - 28C07 : Prestwick St Nicholas';

- 28C05 : Prestwick St Ninian's; and
- 28C09 : Prestwick Toll.

4.4.2 Population

Table 4.19 reports the change in population of Ayr and Prestwick from the 1991 Census to 2001 Census.

Table 4.19: Bute Population by Age Group

	Children		Working Age (59/64)		Retired		All people
			2001				
People	10,809	17%	36,766	59%	14,667	24%	62,242
Males	5527	19%	18,780	64%	5108	17%	29,415
Females	5282	16%	17,986	55%	9559	29%	32,827
1991 People	10,861	18%	35,004	59%	13,617	23%	59,482

Source: 1991 Census, 2001 Census

The Table shows that:

- The population has grown by 5%
- The proportion of children has decreased slightly from 18% to 17%;
- The working age population is unchanged; and
- The retired population has increased slightly from 23% to 24%.

4.4.3 Employment

Table 4.20 reports the change in employment in Ayr and Prestwick from 2000 – 2005 by broad industrial group and by key sector. Figure 1, over, shows the %-age change in employment over this period. The data show that:

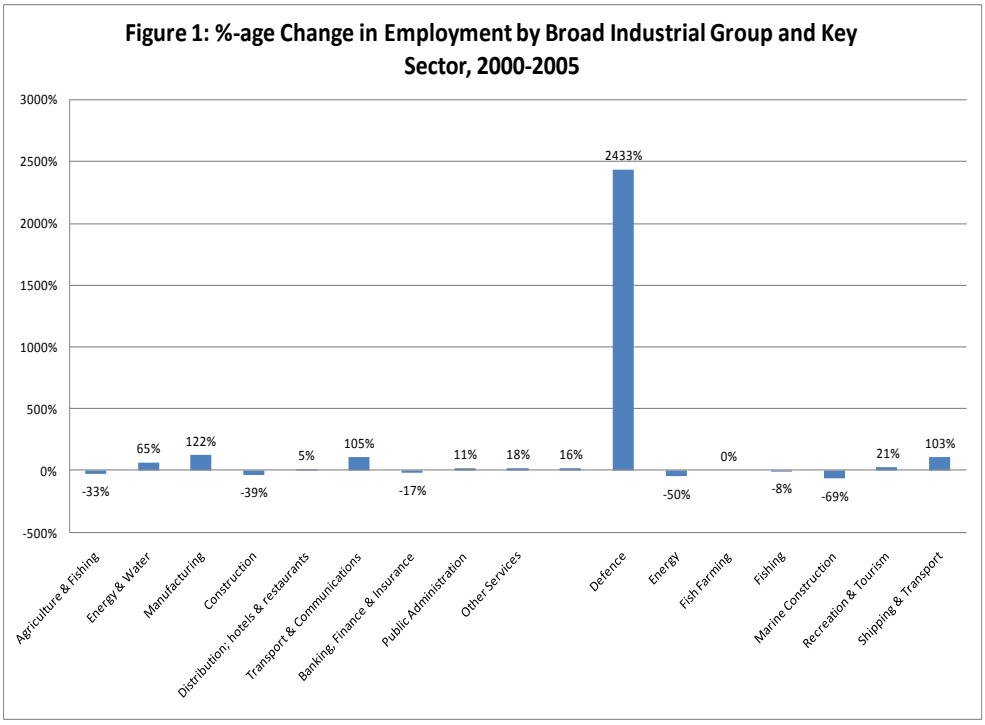
- Distribution/hotels remain the most important employment group in Ayr and Prestwick with 30% of all employees;
- public administration is next with 30%;
- total employment grew by 16% (3,895 jobs)
- there was significant decline in construction and banking/finance employment;
- only recreation and tourism of the key sectors is an important employer;

– there was a net increase of 5% (178 jobs) from the key sectors.

Table 4.20: Ayr and Prestwick Employment change 2000 - 2005

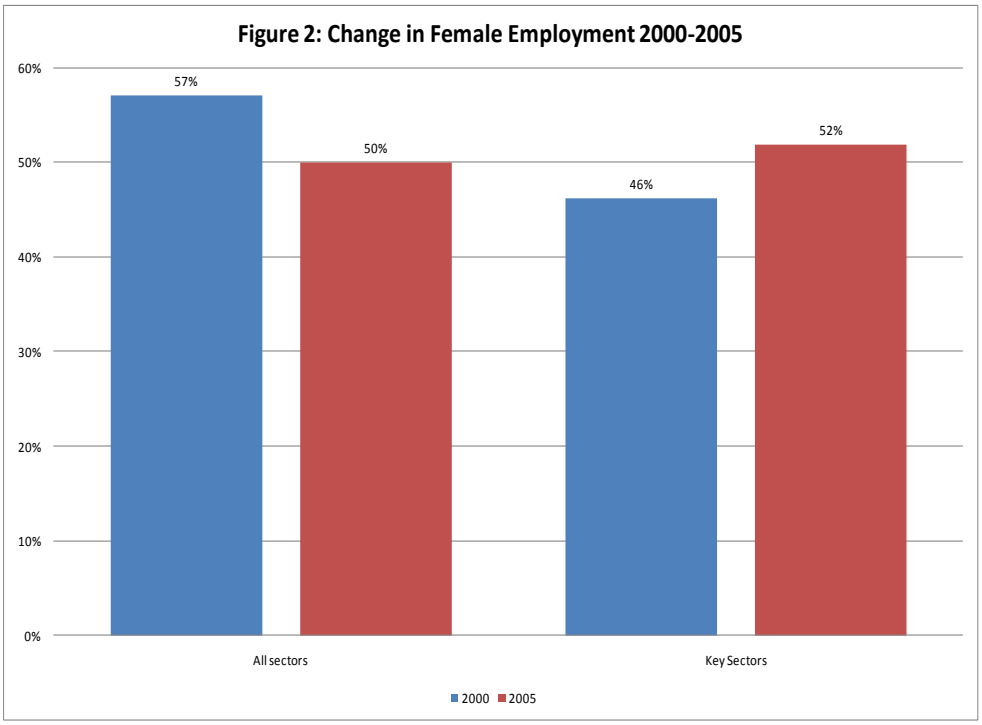
	2000	2005	Change
Agriculture & Fishing	49	33	-16
Energy & Water	62	102	40
Manufacturing	1,867	4,136	2,269
Construction	1,639	997	-642
Distribution; hotels & restaurants	8,138	8,580	442
Transport & Communications	1,084	2,217	1,133
Banking, Finance & Insurance	2,664	2,210	-454
Public Administration	7,766	8,636	870
Other Services	1,417	1,670	253
Defence	9	228	219
Energy	4	2	-2
Fish Farming	0	0	0
Fishing	158	146	-12
Marine Construction	970	296	-674
Recreation & Tourism	2,714	3,290	576
Shipping & Transport	69	140	71

Source: ABI



Source: ABI

Figure 2 reports the change in female employment.



Source: ABI

It shows that:

- females still make up a majority of Ayr and Prestwick's employees;
- females have not benefitted from overall employment growth as much as males;
- in key sectors the proportion of females in employment has gone up by 6%.

4.4.4 Workplaces / Business Base

Table 4.21 reports the change in the workplace / business[28] base in Ayr and Prestwick from 2000 – 2005. Figure 3 shows the %-age change in this base.

Table 4.21: Ayr and Prestwick Business Base change 2000 - 2005

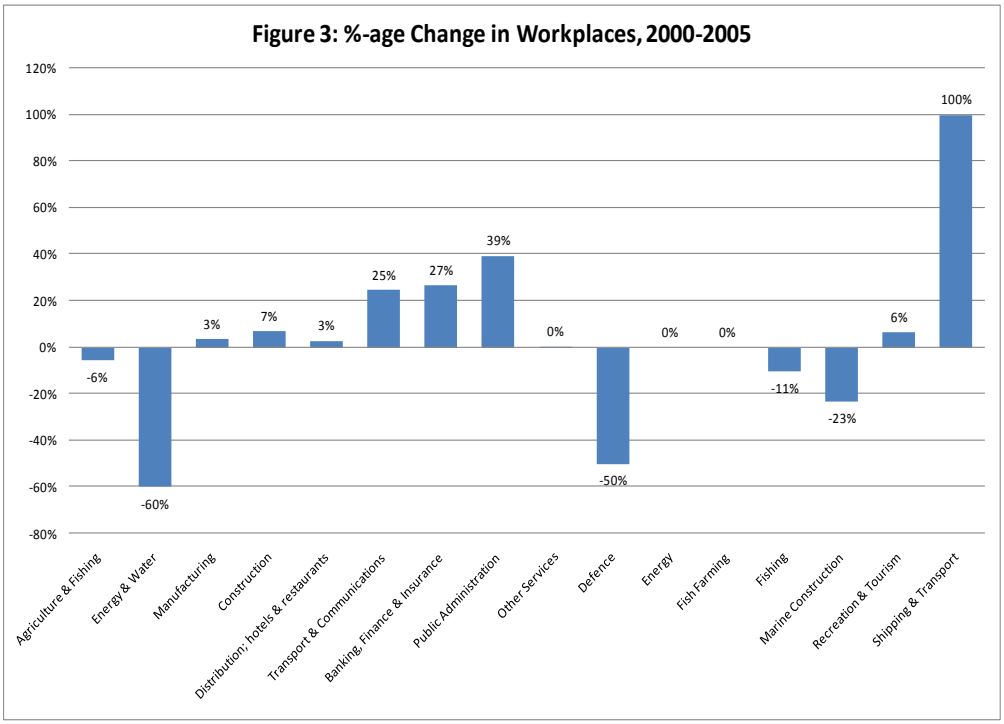
	2000	2005	Change
Agriculture & Fishing	18	17	-1
Energy & Water	5	2	-3
Manufacturing	86	89	3
Construction	141	151	10
Distribution; hotels & restaurants	862	887	25
Transport & Communications	73	91	18
Banking, Finance & Insurance	371	470	99
Public Administration	188	262	74
Other Services	230	231	1
Defence	2	1	-1
Energy	1	1	0
Fish Farming	0	0	0
Fishing	19	17	-2
Marine Construction	39	30	-9
Recreation & Tourism	280	298	18
Shipping & Transport	7	14	7

Source: ABI

The Table data show:

- Distribution / hotels is still the largest business grouping (40%);
- Banking/finance is next with 22% and recreation and tourism with 14%;
- The business base grew by 226 units (11%);
- Banking, public administration and distribution-hotels are some of the sectors which recorded growth;
- Only recreation and tourism is significant of the key sectors; and
- Growth in recreation & tourism gave a net gain of 13 units for the key sectors.

[28] ABI workplaces are widely accepted as a proxy for the business base.



4.4.5 Unemployment

Table 4.22 reports the absolute change in claimant count in Ayr and Prestwick from September 2004 – 2007. Figure 4 shows the change in unemployment rates over the same period.

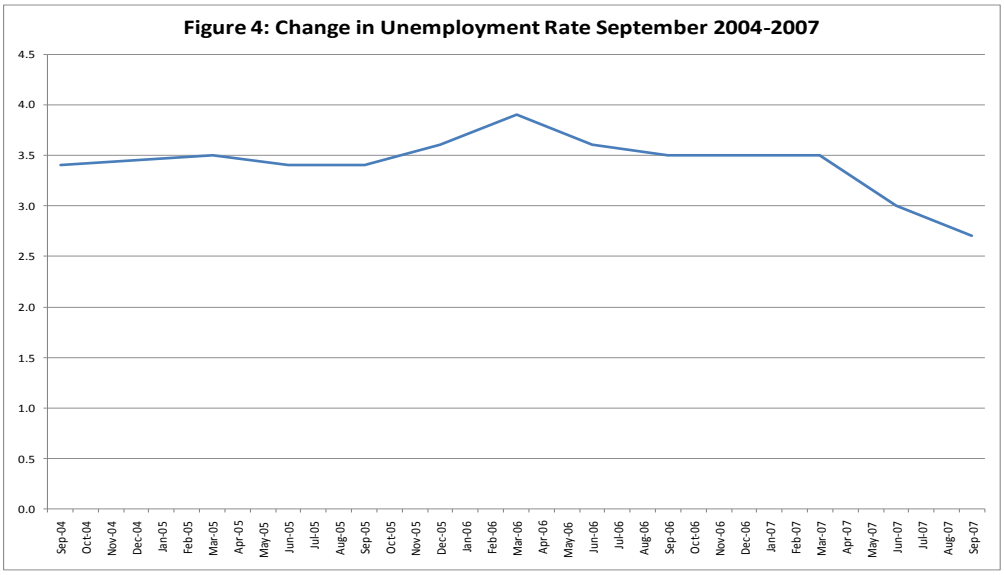
Table 4.22: Absolute Change in Unemployment September 2004 - 2007

2004	1,243
2005	1,264
2006	1,275
2007	994
Change	-249
% Change	-20%

Source: Claimant Count

The data show that:

- Unemployment has fallen by a fifth in three years; and
- The absolute change is relatively high.



Source: Claimant Count

4.4.6 Turnover

Table 4.23 reports turnover change by broad industrial group and key sector in Ayr and Prestwick from 2000 – 2005.

Table 4.23: Ayr and Prestwick Turnover change 2000 - 2005

	£ Per employee	2000 (£m)	£ Per employee	2005 (£m)	Change	%-age change
Agriculture & Fishing	90,999	4.5	111,026	3.7	-0.8	-18
Energy & Water	90,999	5.6	111,026	11.3	5.7	101
Manufacturing	137,310	256.4	149,693	619.1	362.8	142
Construction	73,596	120.6	103,312	103.0	-17.6	-15
Distribution; hotels etc.	65,696	534.6	81,676	700.8	166.1	31
Transport & Comms.	65,696	71.2	81,676	181.1	109.9	154
Banking, Finance etc	55,091	146.8	93,359	206.3	59.6	41
Public Administration	90,999	706.7	111,026	958.8	252.1	36
Other Services	65,696	93.1	81,676	136.4	43.3	47
Defence	65696	0.6	81676	18.6	18.0	3050
Energy	90999	0.4	111026	0.2	-0.1	-39
Fish Farming	146612	0.0	106659	0.0	0.0	-
Fishing	146612	23.2	106659	15.6	-7.6	-33
Marine Construction	73,596	71.4	103312	30.6	-40.8	-57
Recreation & Tourism	35,900	97.4	56900	187.2	89.8	92
Shipping & Transport	50800	3.5	96200	13.5	10.0	284
Total Key Sectors		196.4		265.7	70.4	35
Total all employees		1939.5		2920.5	981.0	51

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: Turnover data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

The Table shows:

- Increases in turnover in the same groups reporting increase in employment;
- Increases are generally greater than the %-age change in employment due to changes in turnover / employee
- Key sectors still fell from 10% of total turnover in 2000 to 9% in 2005.
- The very large change in defence is due to employment growth in the sector from an insignificant 9 to 228.

4.4.7 GVA

Table 4.24 reports GVA data for Ayr and Prestwick from 2000–2005, by broad industrial group and key sector.

Table 4.24: Ayr and Prestwick GVA change 2000 - 2005

	£ Per employee	2000 (£m)	£ Per employee	2005 (£m)	Change (£m)	% change
Agriculture & Fishing	32,093	1.6	44,562	1.5	-0.1	-6
Energy & Water	32,093	2.0	44,562	4.5	2.6	128
Manufacturing	37,816	70.6	49,590	205.1	134.5	191
Construction	29,010	47.5	40,761	40.6	-6.9	-15
Distribution; hotels & restaurants	21,680	176.4	29,747	255.2	78.8	45
Transport & Communications	21,680	23.5	29,747	65.9	42.4	181
Banking, Finance & Insurance	32,963	87.8	38,547	85.2	-2.6	-3
Public Administration	32,093	249.2	44,562	384.8	135.6	54
Other Services	21,680	30.7	29,747	49.7	19.0	62
Defence	21,680	0.2	29,747	6.8	6.6	3376
Energy	32,093	0.1	44,562	0.1	0.0	-31
Fish Farming	58,492	0.0	52,347	0.0	0.0	-
Fishing	58,492	9.2	52,347	7.6	-1.6	-17
Marine Construction	29,010	28.1	40,761	12.1	-16.1	-57
Recreation & Tourism	15,200	41.3	18,200	59.9	18.6	45
Shipping & Transport	21,600	1.5	33,900	4.7	3.3	218
Total Key Sectors		80.4		91.2	10.8	13
Total all employees		689.4		1092.6	403.2	58

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: GVA data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

The data show that:

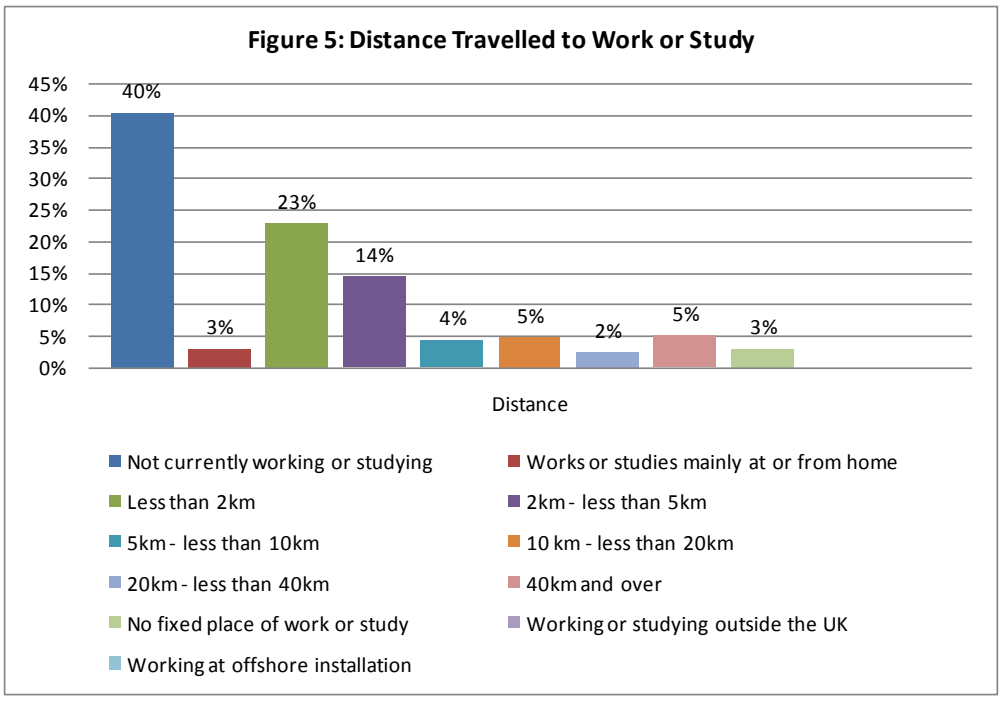
- GVA has increased in the same groups that showed an increase in employment;

- Increases are greater than the %-age changes in employment due to the greater change in GVA/employee;
- Key sectors have fallen from contributing 12% of Ayr and Prestwick's GVA in 2000 to contributing 8% in 2005
- The very large change in defence is due to employment growth in the sector from an insignificant 9 to 228.

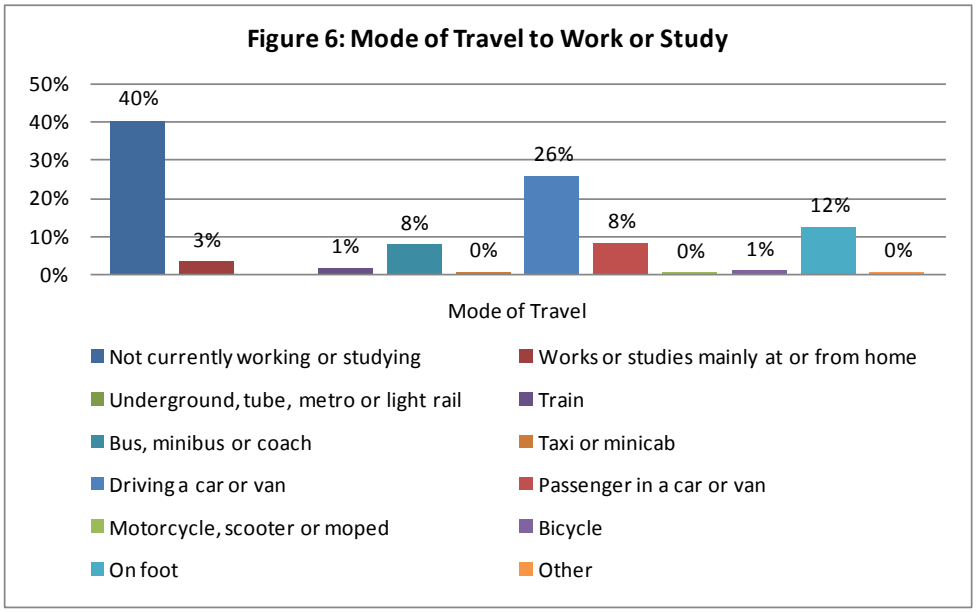
4.4.8 Marine / Port Related Activities

Commuting

Figures 4&5 show the mode and distance reported by those who normally travelled to a place of work or study on Census Day 2001.



Source: 2001 Census



Source: 2001 Census

The Figures show that in 2001:

- 40% of the population did not work or study;
- 44% did so from within 10km of home;
- 7% travelled more than 20km to work or study;
- 34% travelled as a driver or passenger in a car or van;
- 12% walked to work.

Fish Landings

Table 4.25 reports fish landings by volume and value for 2000 and 2006.

Table 4.25: Fish landings at Ayr by Volume and Value 2000 - 06

	Volume (tonnage)	Value (£)
2000	317.5	418,180
2006	19.5	24,511
Change	-298	383,669

Source: Scottish Fisheries Statistics 2006.
Note: Landings are not necessarily made by vessels at their home port or harbour. Troon and Saltcoats are considered as one "creek", the lowest level of disaggregation for which official statistics are available.

The data shows that:

- Live weight tonnage landed fell by 94%; but
- The value of fish landings grew by 92%

Boating & Sailing

Table 4.26 reports the number of berths and moorings available in Brodick Harbour and the Firth of Clyde.

Table 4.26: Available Berths and Moorings

	Current		Proposed	
	Ayr	Clyde	Ayr	Clyde
Berths	0	2674	400	5376
Moorings	0	26	0	163
Total	0	2700	400	5539

Source: Clyde Sailing Study

It shows that:

- Ayr currently has no official facilities for touring boats;
- Significant development of this kind is planned.

Tourism

The Ayr & Prestwick settlement contains the Burns National Heritage Park, the 8th most popular Scottish paid visitor attraction in 2005. It also contains several championship level and municipal golf courses within or close to its boundaries.

The top Ayrshire visitor attractions found within the settlement are:

- Burns National Heritage Park with 264247 visitors;
- Heads of Ayr Farm Park with 71292;
- MacLaurun Galleries with 27272; and
- Rozelle House with 13459;

Ferry Activity

There is no ferry traffic to / from Ayr or Prestwick.

4.4.9 Change Over Time and Potential Projects

In the early 1960s Ayr was still a major resort destination and served by Clyde steamers and cruises. These ceased in 1964 and although Butlins Holiday Camp continued, opening Wonder West World in 1988, controversy over the cleanliness of local beaches persisted until the turn of the century. Ayr harbour continued as a minor port exporting coal through the 1980s and as a base for Atlantic fisheries. The port was improved in 1991 and now also handles shipments of Argyll timber for local mills. However, there has been little other investment in the seafront despite recognition of such a need in the Local Structure Plan.

Prestwick Aerospace Park is identified as a strategic business location for Ayrshire in the Ayrshire Structure Plan and there are also proposals for a significant marina investment (400 berths) in Ayr.

A subjective view of the changing influence of the marine environment on Ayr & Prestwick is presented in the graph below.

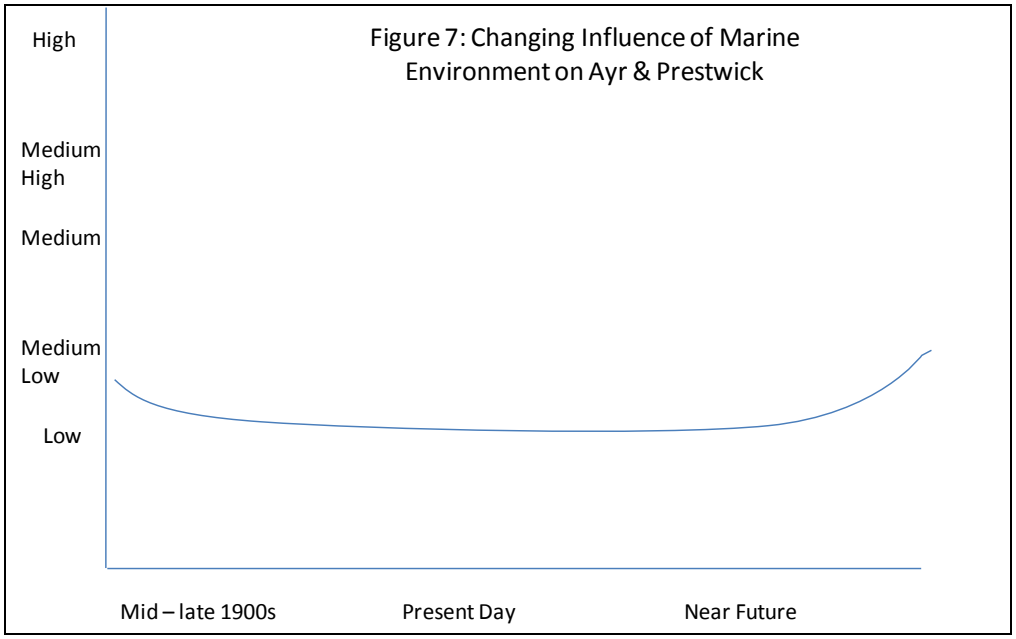


Figure 7: Changing Influence of Marine Environment on Ayr & Prestwick

The graph charts the decline of the domestic day tripper and holiday market, the limited importance of the commercial docks and the focus of employment towards manufacturing. The redevelopment of the harbour and the exploitation of foreign holidaymakers flying into Prestwick are potential growth areas.

4.4.10 Conclusions

The main conclusions from this profile are that:

- The Ayr & Prestwick population is has grown;
- The population profile has aged – fewer children and more retirees
- Population growth has exceeded the Firth of Clyde and Strathclyde average but is less than the change recorded for the outer Firth wards alone;
- Employment growth is much stronger than for the Firth and Strathclyde;
- This is due to strong performance by manufacturing and transport & communications counter to the regional trends;
- Males appear to have benefited more than females from this employment growth as the proportion of female employees has fallen;
- Key sectors do not show as strong employment growth as the economy overall. Female employment in these sectors increased as a proportion of all employees;
- The business base also grew more strongly than the Firth and Strathclyde. Most absolute change was recorded in banking and public administration sectors.
- In the key sectors only recreation and shipping saw any growth. Recreation and tourism businesses grew by 6% while shipping and transport doubled to 14 enterprises;
- Unemployment has fallen significantly in the three years to September 2007. The fall is more than the Firth and Strathclyde average but less than that for the outer firth;
- Turnover and GVA are up, driven by the strong growth in employment. Key sectors have not shared in this strong growth and so their contribution to total turnover and GVA has fallen;
- Residents tend to work locally and travel there by car or vehicle;
- Fishing boat related activity has all but disappeared from Ayr harbour;
- The current tourism offer does not look towards the sea. The focus is more on cultural and other leisure activity.

The data analysis for Ayr & Prestwick is summarised in the SWOT analysis presented below.

STRENGTHS	WEAKNESSES
Established and growing centre for day visitors and overseas tourism via Prestwick Airport Popular area for housing and good local amenities	Lack of investment in Ayr Town Centre and under-usage of seafront
OPPORTUNITIES	**THREATS**
Potential to further grow the overseas tourism market Prestwick Airport route development Marina development	Does not attract airline market Failure to invest in harbour / seafront development

4.5 Bute

4.5.1 Introduction

Bute is defined by the following 1991 or 2003 Census Area Statistic (CAS) wards:

- 1991 Frozen wards:
  - 78UB19: East Rothesay;
  - 78UB20: Kyles and Bute;
- 2003 CAS wards:
  - 04C19: Bute Central;
  - 04C18: Bute North; and
  - 04C20: Bute South.

4.5.2 Population

Table 4.27 reports the change in population of Bute from the 1991 Census to 2001 Census.

Table 4.27: Bute Population by Age Group

	Children		Working Age (59/64)		Retired		All people
2001							
People	1,265	18%	3928	54%	2035	28%	7,228
Males	635	19%	2057	61%	701	21%	3,393
Females	630	16%	1871	49%	1334	35%	3,835
1991 People	645	16%	2,193	56%	1,082	28%	3,920

Source: 1991 Census, 2001 Census

The Table shows that:

- The population has grown by 84% (this is probably a function of change between the 1991 and 2003 ward boundaries. In 1991 the Kyles and Bute ward includes a section of mainland from Colintraive inland along the A886. Any population analysis should therefore be treated with caution.);
- The proportion of children has increased slightly from 16% to 18%;

- The working age population has decreased slightly from 56% to 54%; and

- The retired population is unchanged.

4.5.3 Employment

Table 4.28 reports the change in employment in Bute from 2000–2005 by broad industrial group and by key sector. Figure 1, over, shows the %-age change in employment over this period.

- Public administration has become the most important employment group with 29% of all employees;

- Distribution/hotels is next with 22% and banking/finance with 17%;

- total employment grew by 260% (1771 jobs). The actual increase on Bute itself may be even greater. In 1991 part of the mainland around Colintraive was included in the ward but in 2003 the data refers just to Bute and Little Cumbrae;

- there was a small decline in energy and water and construction employment;

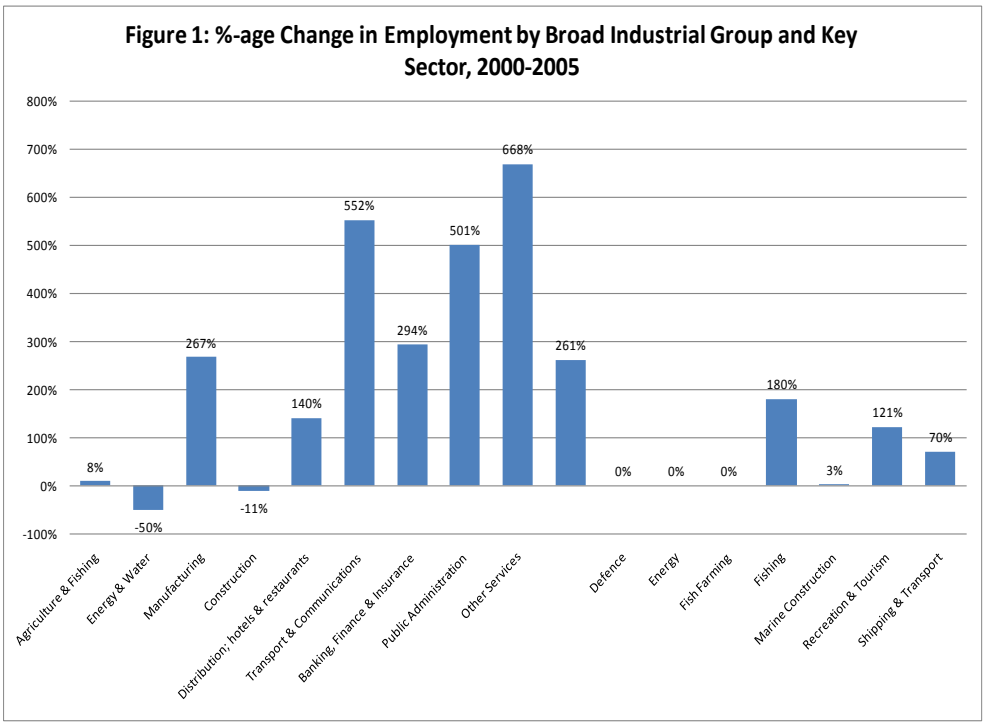
- only recreation and tourism of the key sectors is an important employer; and

- there was a net increase of 99% (213 jobs) from the key sectors.

Table 4.28: Bute Employment change 2000 - 2005

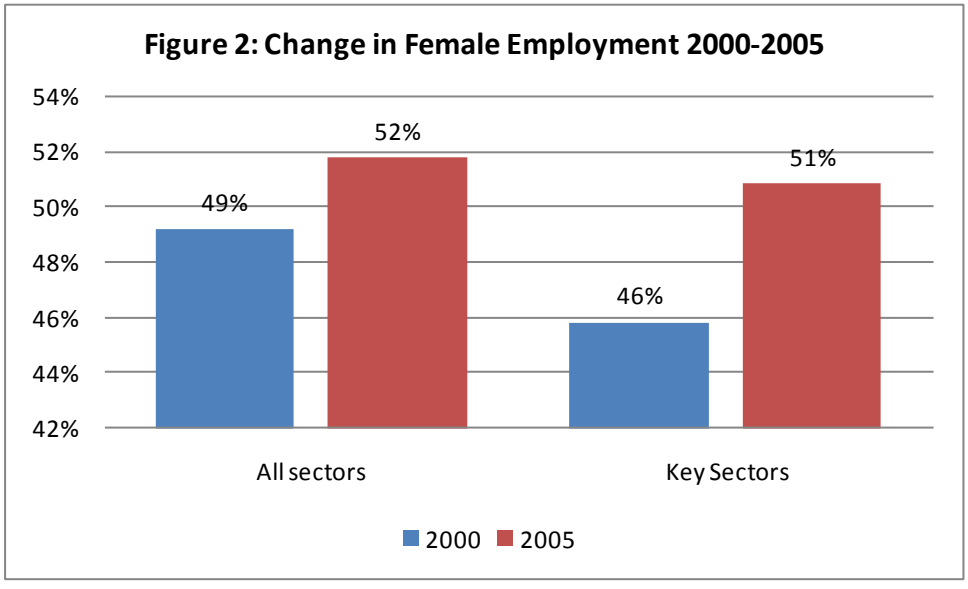
	2000	2005	Change
Agriculture & Fishing	12	13	1
Energy & Water	16	8	-8
Manufacturing	48	176	128
Construction	75	67	-8
Distribution; hotels & restaurants	228	548	320
Transport & Communications	54	352	298
Banking, Finance & Insurance	108	425	317
Public Administration	119	715	596
Other Services	19	146	127
Defence	0	0	0
Energy	0	2	2
Fish Farming	0	0	0
Fishing	5	14	9
Marine Construction	37	38	1
Recreation & Tourism	154	341	187
Shipping & Transport	20	34	14

Source: ABI



Source: ABI

Figure 2 reports the change in female employment.



Source: ABI

It shows that:

- females now make up a majority of Bute's employees;

- females have benefitted more from overall employment growth than males;

- in key sectors the proportion of females in employment has gone up by 5% so they have benefited even more from employment growth.

4.5.4 Workplaces / Business Base

Table 4.29 reports the change in the workplace / business[29] base in Bute from 2000 – 2005. Figure 3 shows the %-age change in this base.

Table 4.29 Bute Business Base change 2000 - 2005

	2000	2005	Change
Agriculture & Fishing	7	9	2
Energy & Water	8	4	-4
Manufacturing	10	15	5
Construction	11	13	2
Distribution; hotels & restaurants	48	98	50
Transport & Communications	7	11	4
Banking, Finance & Insurance	20	41	21
Public Administration	14	35	21
Other Services	12	23	11
Defence	0	0	0
Energy	0	1	1
Fish Farming	0	0	0
Fishing	4	9	5
Marine Construction	3	2	-1
Recreation & Tourism	27	49	22
Shipping & Transport	2	3	1

Source: ABI

The Table data show:

- Distribution / hotels is still the largest business grouping (39%);

- Recreation and tourism is next with 20% and public admin with 14%;

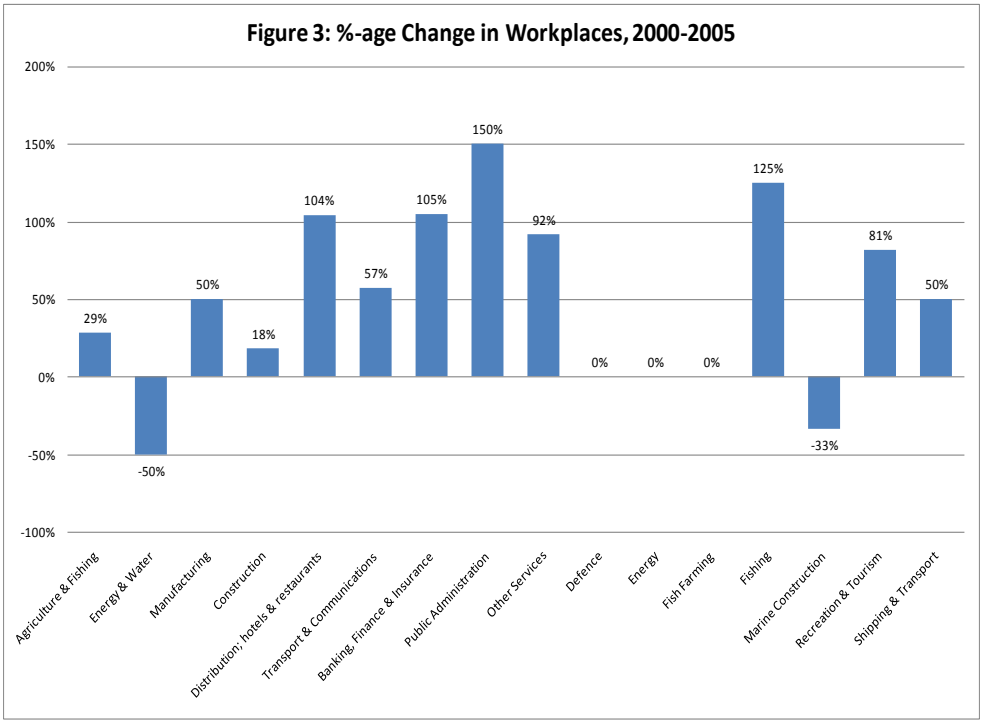
- The business base grew by 112 units (82%);

- Distribution/hotels, banking, and recreation and tourism are some of the sectors which recorded growth;

- Recreation and tourism is the largest of the key sectors but fishing did double the number of units from 4 to 9;

- Growth in recreation & tourism gave a net gain of 28 units for the key sectors.

[29] ABI workplaces are widely accepted as a proxy for the business base.



4.5.5 Unemployment

Table 4.30 reports the absolute change in claimant count on Bute from September 2004–2007. Figure 4 shows the change in unemployment rates over the same period.

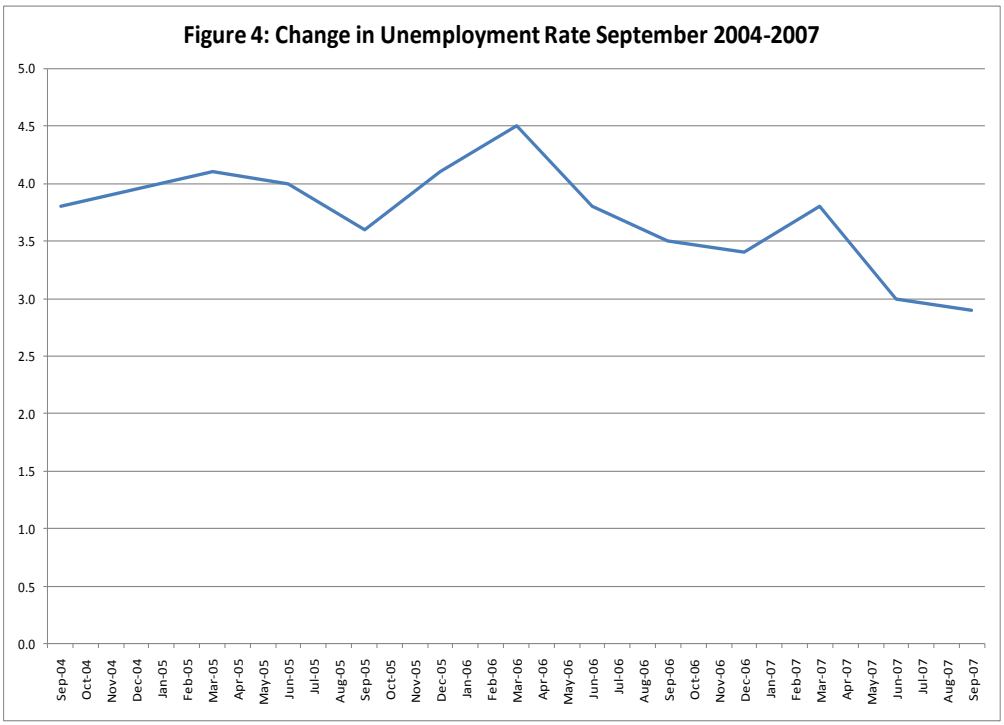
Table 4.30: Absolute Change in Unemployment September 2004 - 2007

2004	148
2005	142
2006	139
2007	114
Change	-34
% Change	-23%

Source: Claimant Count

The data show that:

- Unemployment has fallen by more than a fifth in three years; and
- The absolute change is relatively small.



Source: Claimant Count

4.5.6 Turnover

Table 4.31, over reports turnover change by broad industrial group and key sector on Bute from 2000 – 2005.

The Table shows:

- Increases in turnover in the same groups reporting increase in employment;
- Increases are generally greater than the %-age change in employment due to changes in turnover / employee;
- Key sectors show increases in turnover, but not as much as found in the wider economy;
- Key sectors fell from 19% of total turnover in 2000 to 10% in 2005.

Table 4.31: Bute Turnover change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	%-age change
Agriculture & Fishing	90,999	1.1	111,026	1.4	0.4	32
Energy & Water	90,999	1.5	111,026	0.9	-0.6	-39
Manufacturing	137,310	6.6	149,693	26.3	19.8	300
Construction	73,596	5.5	103,312	6.9	1.4	25
Distribution; hotels & restaurants	65,696	15.0	81,676	44.8	29.8	199
Transport & Communications	65,696	3.5	81,676	28.8	25.2	710
Banking, Finance & Insurance	55,091	5.9	93,359	39.7	33.7	567
Public Administration	90,999	10.8	111,026	79.4	68.6	633
Other Services	65,696	1.2	81,676	11.9	10.7	855
Defence	65696	0.0	81676	0.0	0.0	-
Energy	90999	0.0	111026	0.2	0.2	-
Fish Farming	146612	0.0	106659	0.0	0.0	-
Fishing	146612	0.7	106659	1.5	0.8	104
Marine Construction	73,596	2.7	103312	3.9	1.2	44
Recreation & Tourism	35,900	5.5	56900	19.4	13.9	251
Shipping & Transport	50800	1.0	96200	3.3	2.3	222
Total Key Sectors		10.0		28.3	18.3	188
Total all employees		51.2		240.1	188.9	369

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: Turnover data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

4.5.7 GVA

Table 4.32, over reports GVA data for Bute from 2000–2005 by broad industrial group and key sector.

The data show that:

- GVA has increased in the same groups that showed an increase in employment;
- Increases are greater than the %-age changes in employment due to the greater change in GVA/employee;
- Key sectors show an increase in GVA;
- Key sectors have fallen from contributing 21% of Bute's GVA in 2000 to contributing 12% in 2005.

Table 4.32: Bute GVA change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	%-age change
Agriculture & Fishing	32,093	0.4	44,562	0.6	0.2	50
Energy & Water	32,093	0.5	44,562	0.4	-0.2	-31
Manufacturing	37,816	1.8	49,590	8.7	6.9	381
Construction	29,010	2.2	40,761	2.7	0.6	26
Distribution; hotels & restaurants	21,680	4.9	29,747	16.3	11.4	230
Transport & Communications	21,680	1.2	29,747	10.5	9.3	794
Banking, Finance & Insurance	32,963	3.6	38,547	16.4	12.8	360
Public Administration	32,093	3.8	44,562	31.9	28.0	734
Other Services	21,680	0.4	29,747	4.3	3.9	954
Defence	21,680	0.0	29,747	0.0	0.0	-
Energy	32,093	0.0	44,562	0.1	0.1	-
Fish Farming	58,492	0.0	52,347	0.0	0.0	-
Fishing	58,492	0.3	52,347	0.7	0.4	151
Marine Construction	29,010	1.1	40,761	1.5	0.5	44
Recreation & Tourism	15,200	2.3	18,200	6.2	3.9	165
Shipping & Transport	21,600	0.4	33,900	1.2	0.7	167
Total Key Sectors		4.1		9.7	5.6	135
Total all employees		18.8		91.8	73.0	388

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: GVA data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

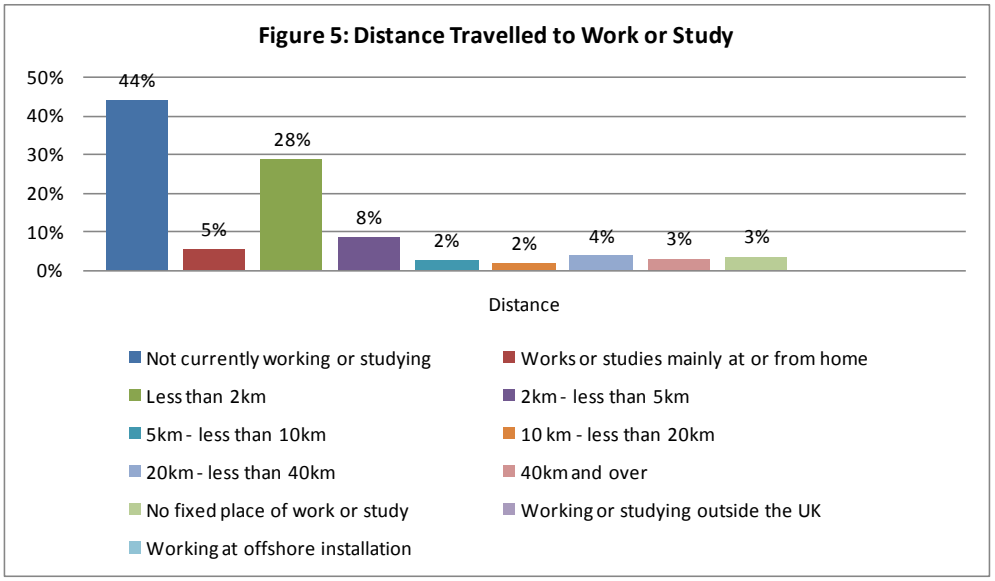
4.5.8 Marine / Port Related Activities

Commuting

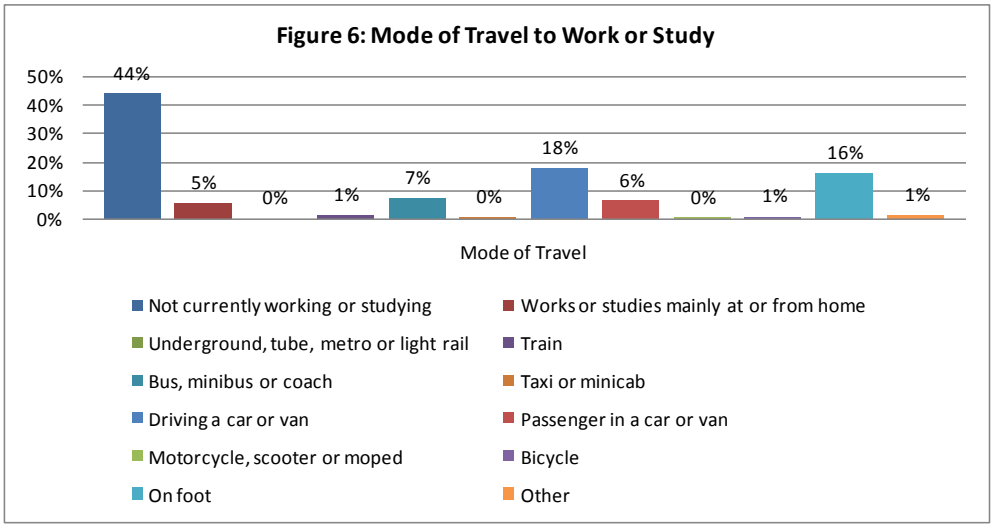
Figures 4&5 show the mode and distance reported by those who normally travelled to a place of work or study on Census Day 2001.

The data show that:

- 44% of the population did not work or study;
- 43% did so within 10km of home;
- 7% travelled more than 20km to work or study;
- 24% travelled as driver or passenger in a car or van;
- 16% walked to work.



Source: 2001 Census



Source: 2001 Census

Fish Landings

Table 4.33 reports fish landings by volume and value for 2000 and 2006.

Table 4.33: Fish landings at Bute by Volume and Value 2000 - 06

	Volume (tonnage)	Value (£)
2000	103.25	356,233
2006	129.5	444,204
Change	26.25	87,971

Source: Scottish Fisheries Statistics 2006.
Note: Landings are not necessarily made by vessels at their home port or harbour.

The data shows that:

- Live weight tonnage landed increased by 25%; and
- The value of fish landings grew by 25%

Boating & Sailing

Table 4.34 reports the number of berths and moorings available in Bute and the Firth of Clyde.

Table 4.34: Available Berths and Moorings

	Current		Proposed	
	Bute	Clyde	Bute	Clyde
Berths	15	2674	200	5376
Moorings	0	26	0	163
Total	15	2700	200	5539

Source: Clyde Sailing Study

It shows that:

- Bute currently has limited facilities for touring boats;
- Significant development of this kind is planned.

Tourism

BUte has not attractions ranked among the Top 20 paid or free attractions in Scotland in 2005. However, it does have ranked visitor attractions in the AILLST area:

- Isle of Bute Discovery Centre with 136325 visitors; and
- Mount Stuart with 34962; and
- Ardencraig Gardens with 15000.

Ferry Activity

Table 4.35: reports change in traffic on the Wemyss Bay - Rothesay ferry route, the main ferry service between Bute and the mainland.

Table 4.35: Ferry Traffic Wemyss Bay - Rothesay 2000 - 2005

Bute	2000	2005	Change	% change
Passengers	681099	750119	69020	10%
Cars	126102	152460	26358	21%
Commercial & buses	12490	11008	-1482	-12%
Clyde				
Passengers	3013200	3256000	242800	8%
Cars	567800	636700	68900	12%
Commercial & buses	50400	51200	800	2%

Source: Scottish Government Water Transport Statistics 2006

The Table shows that:

- There has been significant growth in ferry traffic to/from Bute;
- This growth was more than that for the whole Firth of Clyde for cars and passengers;
- commercial vehicle and bus numbers declined. This is counterintuitive in light of the growth in employment and economic activity on the island;
- In 2005 Wemyss Bay - Rothesay accounted for
  - 23% of Clyde passenger traffic
  - 24% of car traffic
  - 22% of commercial vehicle / bus traffic

4.5.9 Change Over Time and Potential Projects

White fisheries had been important for a time in Bute but by the 1950s only ten boats were at work. The peak of tourism and Clyde cruising came in 1955 but thereafter quickly gave way to package deals with more reliable sunshine. The few remaining steamers were soon completely replaced by a full ro-ro car ferry from Wemyss Bay. By 1969 only 40 fishermen remained, but Rothesay Seafoods, established about 1965 employed 70 people in 1973. Bute and its facilities declined steadily through the 70s and 80s as its administrative functions were shorn and even the Royal Northern Yacht Club merged and moved to the mainland. New employment in electronics and food manufacture arrived in the 90s but the hotels were up for sale.

Potential projects on Bute include: £1.5m harbour upgrade; £2.25m for heritage landscape projects (2008-2012); and £10m to improve the ferry terminal facilities. The Clyde Sailing Study also identifies proposals for 200 new sailing berths in Rothesay.

A subjective view of the changing influence of the marine environment on Bute is presented in the graph below.

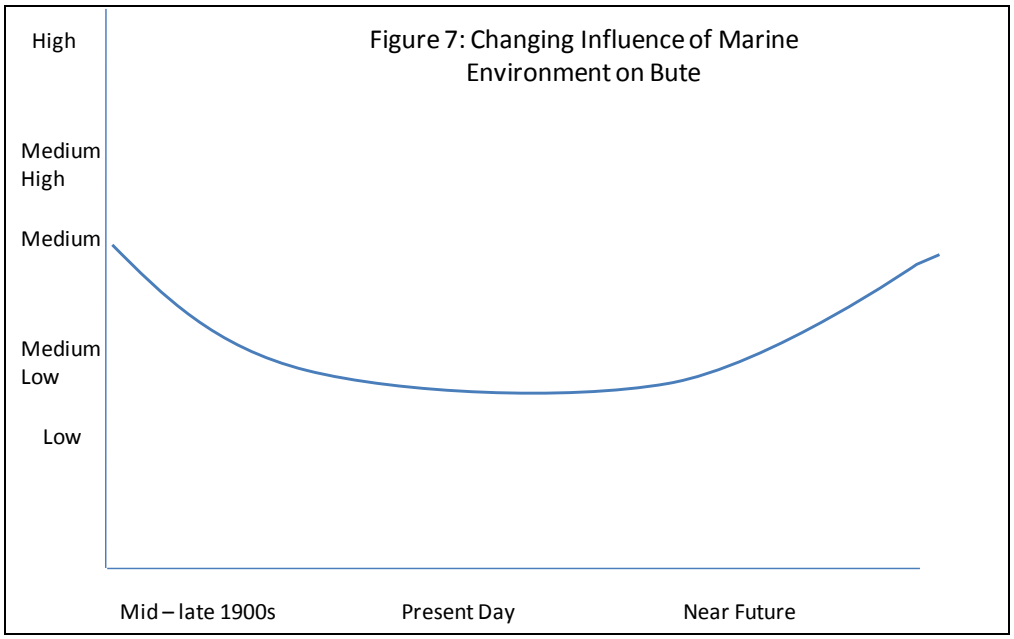


Figure 7: Changing Influence of Marine Environment on Bute

The graph charts the decline of the fishing, Clyde cruising holiday market and the loss of recreational sailing facilities. New employment opportunities are not directly dependent on the maritime environment beyond the obvious need to ship material on and off the island by ferry. Grounds for optimism lie in the potential to redevelop the harbour and ferry terminal, bringing back significant recreational sailing facilities and additional tourists to the island.

4.5.10 Conclusions

The main conclusions from this profile are:

- Population growth appears very significant between 1991 and 2001. However, differences in the geographies used to define Bute mean this must be treated with some caution;
- The 1991 definition included part of the mainland but the 2003 definition is solely the Isle of Bute and Little Cumbrae
- Employment also shows substantial growth. Again this may be influenced by the change in geography defining Bute;
- Total employment more than tripled;
- Transport, public admin and other services increased more than 5-fold;
- Key sectors reported increases but of a much lesser scale and some slight in absolute terms;
- Females benefited more than males from the growth in employment;
- The business base grew too but again key sectors did not expand to the same extent;
- Unemployment fell significantly in %-age terms but the absolute fall was slight
- Employment growth is due to new workers coming to the island;
- Key sectors saw their contribution to turnover and GVA on Bute fall;
- Most residents work locally;
- Fish landings have increased in both volume and value but are still at relatively low levels;
- Bute has limited berthing facilities for visiting boats but there are plans to expand this significantly;
- Bute accounts for a significant proportion of ferry traffic across the Firth of Clyde. The decline in commercial vehicle and bus traffic seems at odds with the apparent economic growth discussed elsewhere.

The data analysis for Bute is summarised in the SWOT analysis presented below.

STRENGTHS	WEAKNESSES
Excellent variety of recreational and heritage opportunities Easy access by ferry – train/road to Glasgow Bute Beyond 2000 partnership leading development	Quality of some housing and retailing stock and depressed housing market. Limited sail berthing facilities at present.
OPPORTUNITIES	**THREATS**
Capitalise on quality of architecture and heritage landscape Marine development, including new berths.	Remaining derelict buildings detract from investment

4.6 Campbeltown

4.6.1 Introduction

This paper presents a profile of Campbeltown, a key settlement area on the Firth of Clyde.

Campbeltown is defined by the following 1991 or 2003 Census Area Statistic (CAS) wards:

- 1991 frozen wards
  - 78UB02: Kilkerran;
  - 78UB01: Kinloch;
  - 78UB04: Mid Kintyre;
  - 78UB05: South Kintyre.
- 2003 CAS wards
  - 04C02: Campbeltown Central;
  - 04C03: East Central Kintyre;
  - 04C01: South Kintyre.

4.6.2 Population

Table 4.36 reports the change in population of Campbeltown from the 1991 Census to 2001 Census

Table 4.36: Campbeltown Population by Age Group

	Children		Working Age (59/64)		Retired		All people
2001							
People	1532	20%	4317	56%	1863	24%	7,712
Males	785	21%	2324	61%	693	18%	3,802
Females	747	19%	1993	51%	1170	30%	3,910
1991 People	1,688	19%	5,284	61%	1,730	20%	8,702

Source: 1991 Census, 2001 Census

The Table shows that:

- The population has decreased by 11%;

- The proportion of children has increased slightly from 19% to 20%;
- The working age population has decreased from 61% to 56%; and
- The retired population has increased from 20% to 24%.

4.6.3 Employment

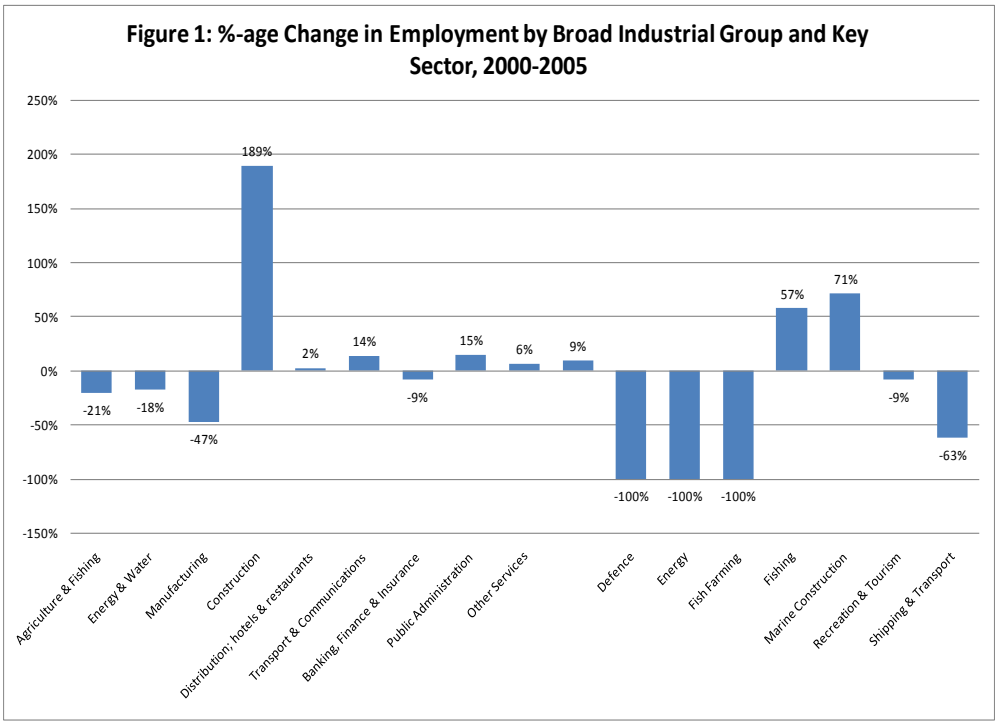
Table 4.37 reports the change in employment in Campbeltown from 2000–2005 by broad industrial group and by key sector. Figure 1, over, shows the %-age change in employment over this period.

Table 4.37: Campbeltown Employment change 2000 - 2005

	2000	2005	Change
Agriculture & Fishing	53	42	-11
Energy & Water	22	18	-4
Manufacturing	269	142	-127
Construction	110	318	208
Distribution; hotels & restaurants	734	752	18
Transport & Communications	176	200	24
Banking, Finance & Insurance	148	135	-13
Public Administration	904	1,038	134
Other Services	82	87	5
Defence	16	0	-16
Energy	2	0	-2
Fish Farming	9	0	-9
Fishing	47	74	27
Marine Construction	24	41	17
Recreation & Tourism	250	228	-22
Shipping & Transport	16	6	-10

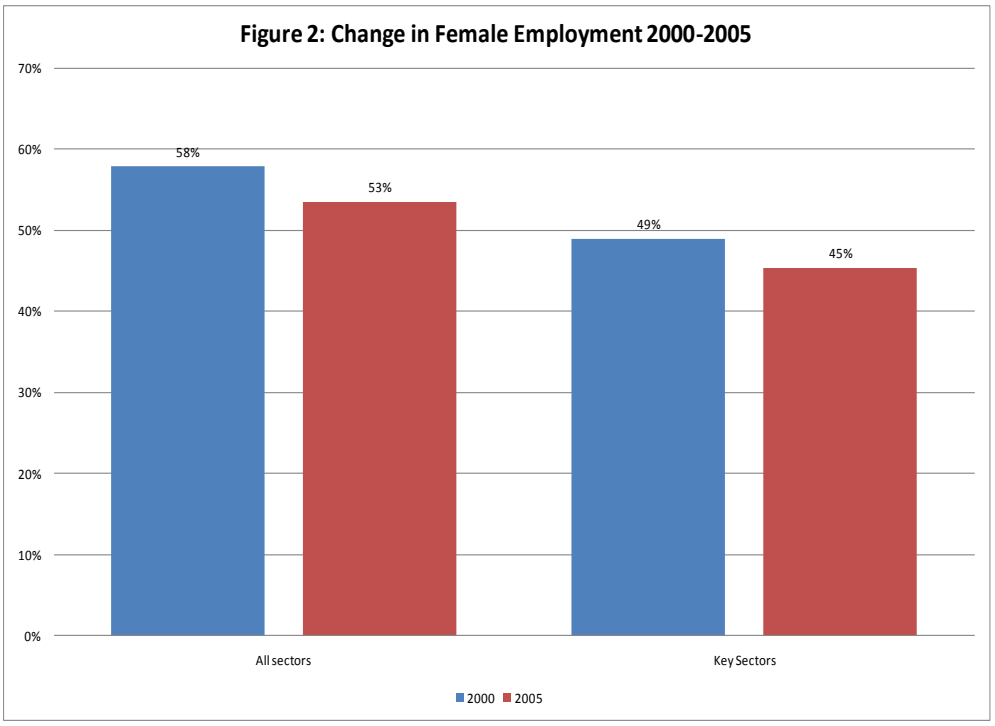
Source: ABI

- Public administration remains the most important employment group in Campbeltown with 38% of all employees;
- Distribution/hotels is next with 28%;
- total employment grew by 10% (238 jobs);
- there was a decline in manufacturing, and banking/finance amongst others;
- only recreation and tourism of the key sectors is an important employer;
- there was a net loss of 4% (15 jobs) from the key sectors.



Source: ABI

Figure 2 reports the change in female employment.



Source: ABI

It shows that:

- females now make up a smaller proportion of Campbeltown's employees;
- females have not benefitted from overall employment growth as much as males; and
- in key sectors the proportion of females in employment has decreased by 4%.

4.6.4 Workplaces / Business Base

Table 4.38 reports the change in the workplace / business[30] base in Campbeltown from 2000 – 2005. Figure 3 shows the %-age change in this base.

Table 4.38: Campbeltown Business Base change 2000 - 2005

	2000	2005	Change
Agriculture & Fishing	34	30	4
Energy & Water	14	6	-8
Manufacturing	21	20	-1
Construction	22	27	5
Distribution; hotels & restaurants	128	115	-13
Transport & Communications	24	16	-8
Banking, Finance & Insurance	35	38	3
Public Administration	47	47	0
Other Services	22	27	5
Defence	3	0	-3
Energy	1	0	-1
Fish Farming	3	0	-3
Fishing	31	28	-3
Marine Construction	6	9	3
Recreation & Tourism	40	38	-2
Shipping & Transport	8	4	-4

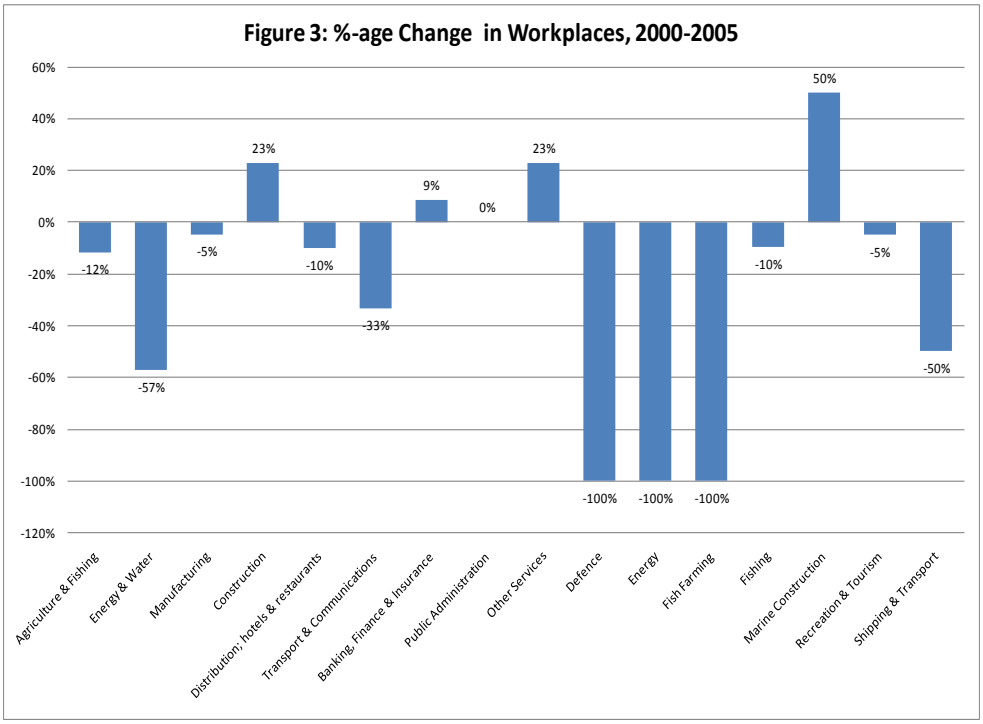
Source: ABI

The Table data show:

- Distribution / hotels is still the largest business grouping (35%);
- Public admin is next with 14%;
- The business base decreased by 21 units (6%);
- Only agriculture, construction, banking, other services and marine construction recorded any growth;

[30] ABI workplaces are widely accepted as a proxy for the business base.

– Only recreation and tourism is significant of the key sectors, however it experienced a decline of 2 units over the intervening period.



Source: ABI

4.6.5 Unemployment

Table 4.39 reports the absolute change in claimant count in Campbeltown from September 2004–2007. Figure 4 shows the change in unemployment rates over the same period.

Table 4.39: Absolute Change in Unemployment September 2004 - 2007

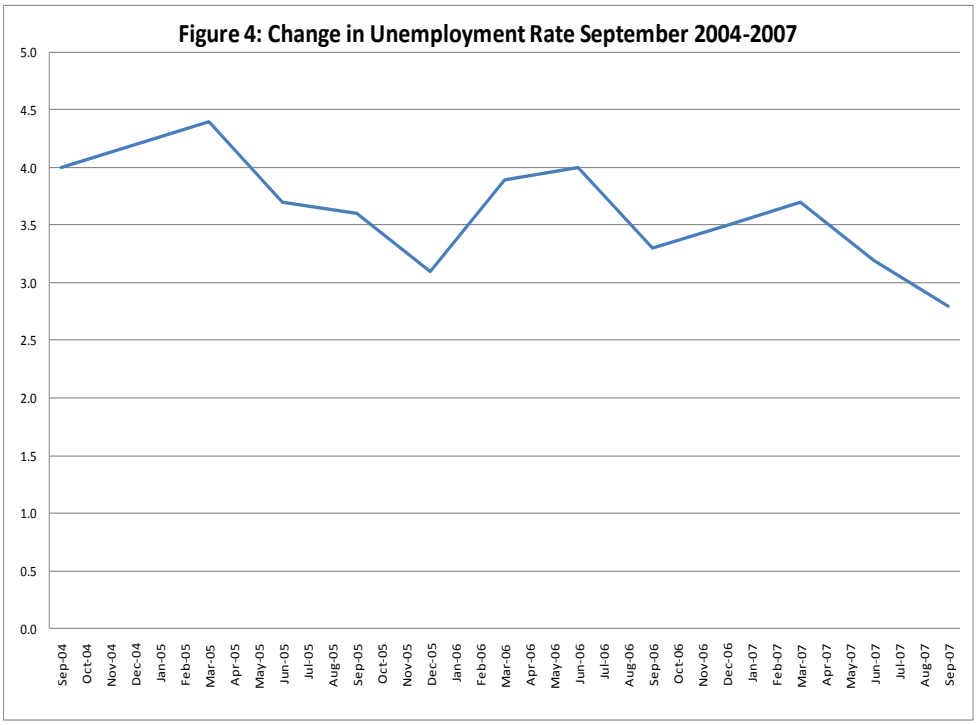
2004	171
2005	155
2006	143
2007	120
Change	-51
% Change	-30%

Source: Claimant Count

The data show that:

– Unemployment has fallen by nearly a third in three years;

– The absolute change is relatively small.



Source: Claimant Count

4.6.6 Turnover

Table 5 reports turnover change by broad industrial group and key sector in Campbeltown from 2000 – 2005.

The Table shows:

- Increases in turnover in the same groups reporting increase in employment;
- Increases are generally greater than the %-age change in employment due to changes in turnover / employee;
- Defence, energy and fish farming show decreases in turnover; and
- Key sectors fell from 10% of total turnover in 2000 to 9% in 2005.

Table 4.40: Campbeltown Turnover change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	%-age Change
Agriculture & Fishing	90,999	4.8	111,026	4.7	-0.2	-3
Energy & Water	90,999	2.0	111,026	2.0	0.0	0
Manufacturing	137,310	36.9	149,693	21.3	-15.7	-42
Construction	73,596	8.1	103,312	32.9	24.8	306
Distribution; hotels & restaurants	65,696	48.2	81,676	61.4	13.2	27
Transport & Communications	65,696	11.6	81,676	16.3	4.8	41
Banking, Finance & Insurance	55,091	8.2	93,359	12.6	4.4	55
Public Administration	90,999	82.3	111,026	115.2	33.0	40
Other Services	65,696	5.4	81,676	7.1	1.7	32
Defence	65696	1.1	81676	0.0	-1.1	-100
Energy	90999	0.2	111026	0.0	-0.2	-100
Fish Farming	146612	1.3	106659	0.0	-1.3	-100
Fishing	146612	6.9	106659	7.9	1.0	15
Marine Construction	73,596	1.8	103312	4.2	2.5	140
Recreation & Tourism	35,900	9.0	56900	13.0	4.0	45
Shipping & Transport	50800	0.8	96200	0.6	-0.2	-29
Total Key Sectors		21.0		25.7	4.7	22
Total all employees		207.4		273.5	66.0	32

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: Turnover data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

4.6.7 GVA

Table 4.41 reports GVA data for Campbeltown from 2000–2005 by broad industrial group and key sector.

Table 4.41: Campbeltown GVA change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	%-age change
Agriculture & Fishing	32,093	1.7	44,562	1.9	0.2	10
Energy & Water	32,093	0.7	44,562	0.8	0.1	14
Manufacturing	37,816	10.2	49,590	7.0	-3.1	-31
Construction	29,010	3.2	40,761	13.0	9.8	306
Distribution; hotels & restaurants	21,680	15.9	29,747	22.4	6.5	41
Transport & Communications	21,680	3.8	29,747	5.9	2.1	56
Banking, Finance & Insurance	32,963	4.9	38,547	5.2	0.3	7
Public Administration	32,093	29.0	44,562	46.3	17.2	59
Other Services	21,680	1.8	29,747	2.6	0.8	46
Defence	21,680	0.3	29,747	0.0	-0.3	-100
Energy	32,093	0.1	44,562	0.0	-0.1	-100
Fish Farming	58,492	0.5	52,347	0.0	-0.5	-100
Fishing	58,492	2.7	52,347	3.9	1.1	41
Marine Construction	29,010	0.7	40,761	1.7	1.0	140
Recreation & Tourism	15,200	3.8	18,200	4.1	0.3	9
Shipping & Transport	21,600	0.3	33,900	0.2	-0.1	-41
Total Key Sectors		8.5		9.9	1.4	16
Total all employees		71.2		105	33.9	48

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: GVA data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

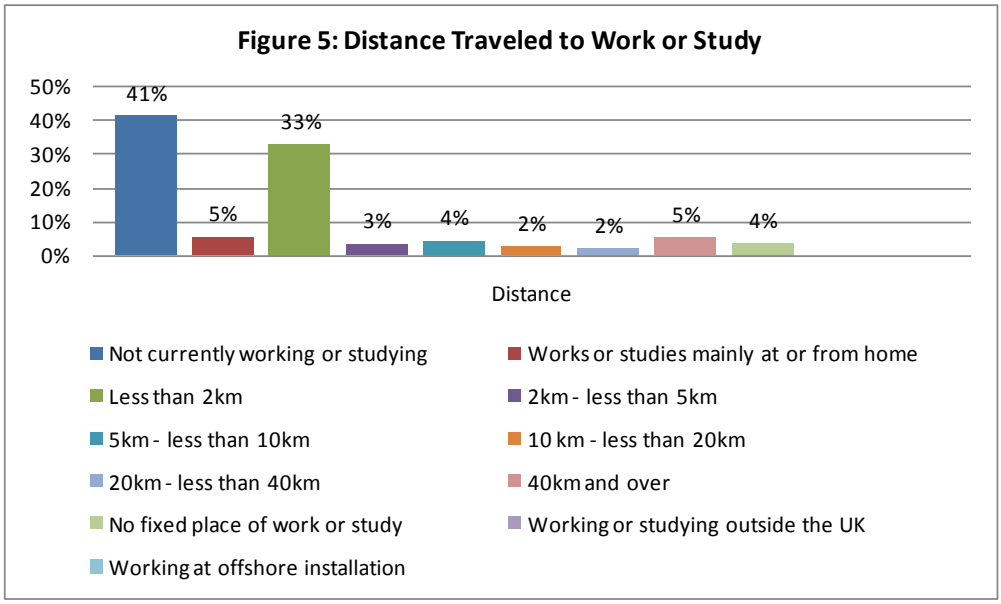
The data show that:

- GVA has increased in the same groups that showed an increase in employment;
- Increases are greater than the %-age changes in employment due to the greater change in GVA/employee;
- Fishing, Marine construction and recreation and tourism are the only key sectors which show an increase in GVA; and
- Key sectors have fallen from contributing 12% of Campbeltown's GVA in 2000 to contributing 9% in 2005.

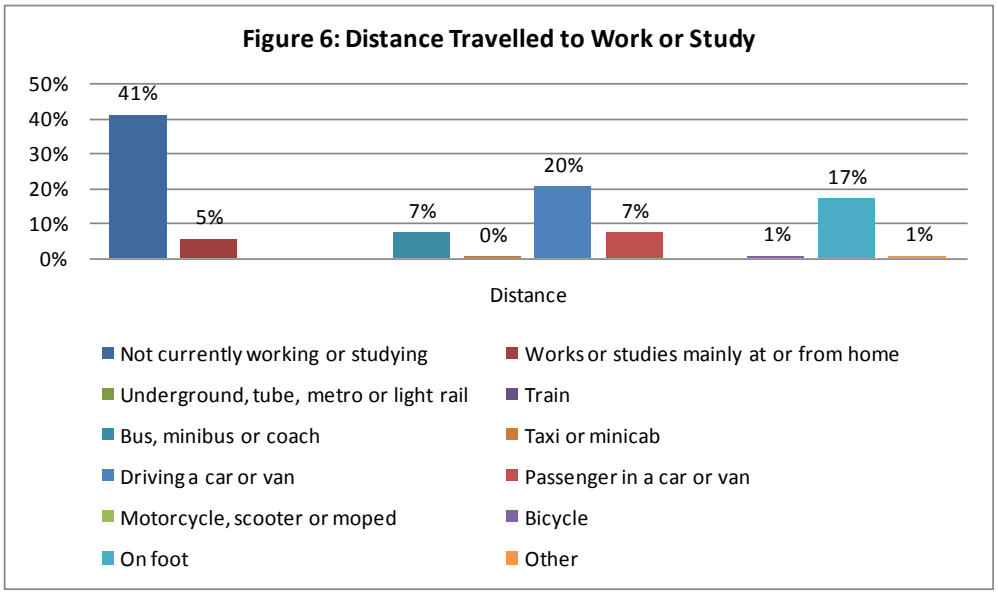
4.6.8 Marine / Port Related Activities

Commuting

Figures 4&5 show the mode and distance reported by those who normally travelled to a place of work or study on Census Day 2001.



Source: 2001 Census



Source: 2001 Census

The figures show that in 2001:

- 41% of the population did not work or study;
- 45% did so within 10km of home;
- 7% travelled more than 20km to work;
- 27% travelled as driver or passenger in a car or van;
- 17% walked to work.

Fish Landings

Table 4.42 reports fish landings by volume and value for 2000 and 2006.

Table 4.42: Fish landings at Campbeltown by Volume and Value 2000-06

	Volume (tonnage)	Value (£)
2000	2242	2,036,315
2006	1662	2,917,472
Change	-580	881,157

Source: Scottish Fisheries Statistics 2006.
Note: Landings are not necessarily made by vessels at their home port or harbour.

The data shows that:

- Live weight tonnage landed fell by 25%; but
- The value of fish landings grew by 43%

Boating & Sailing

Table 4.43 reports the number of berths and moorings available in Campbeltown and the Firth of Clyde.

Table 4.43: Available Berths and Moorings

	Current		Proposed	
	Campbeltown	Clyde	Campbeltown	Clyde
Berths	26	2674	120	5376
Moorings	0	26	0	163
Total	0	2700	120	5539

Source: Clyde Sailing Study

It shows that:

- Campbeltown currently has limited facilities for touring boats;
- Significant development of this kind is planned

Tourism

Campbeltown has no attractions ranked in the Top 20 paid or free attractions in Scotland. It also has no major attractions ranked among the most visited in the AILLST area.

Ferry Activity

There are no major ferry routes to / from Campbeltown.

4.6.9 Change Over Time and Potential Projects

Steamer calls resumed and replaced naval activity after the War but ceased in 1949, leaving only a few summer cruise visits. Fishing and boat building declined during the 1950s & 60s but in 1969-70 Lithgows of Port Glasgow re-established a fishing vessel boat-yard at Trench Point with four covered slips. It employed over 100 men in 1976 and by 1990 had completed 87 boats in 21 years of operation. At that time it was said to be one of the last Scottish yards building small vessels, but, with no orders due to reduced fishing quotas, its 84 workers were laid off for a time; the yard was still open for boat repairs in 1995. Also in 1995 Sea Containers gained approval to develop the harbour by building a new pier 2km south-east of the town, for a new car ferry service to Ballycastle in Northern Ireland. This Summer-only service did not last long and did not bring the expected boost to local tourism. Operations ceased in 2000 with the loss of 80 seasonal jobs. Other manufacturing ventures have waxed and waned over the years but, in 2002, a Danish company, Vestas Wind Technology, established a wind turbine manufacturing facility.

The Five Year Campbeltown and Kintyre Strategy published in 2005 had ambitious plans for the regeneration of the town centre. However, some developments are now deleted from the Local Plan (harbour, waterfront, town centre). There are still plans for the consolidation and relocation of Council offices and also plans to double sailing berths in Campbeltown.

A subjective view of the changing influence of the marine environment on Campbeltown is presented in the graph below.

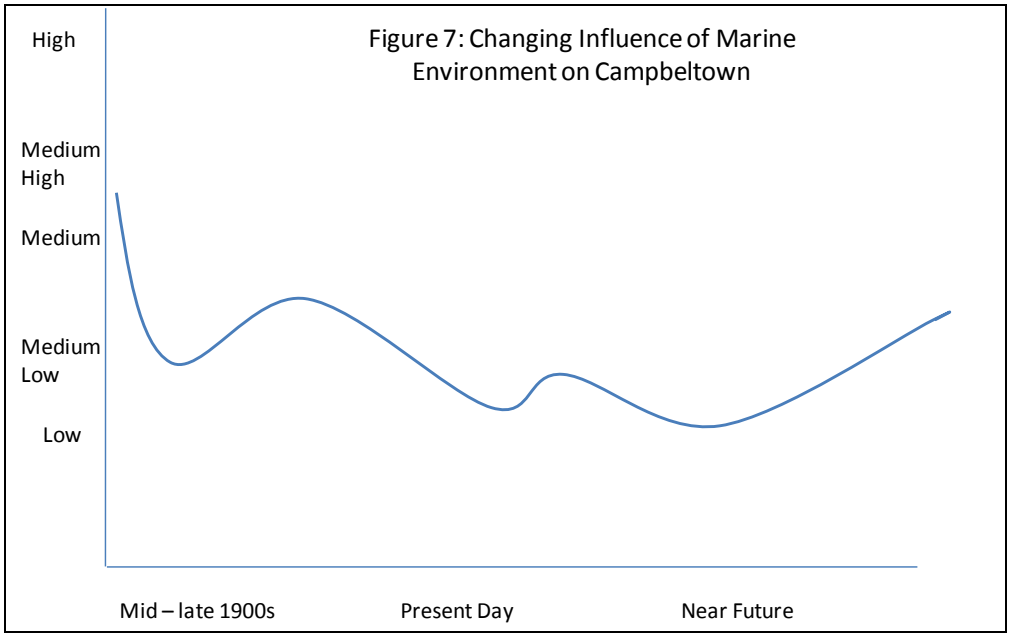


Figure 7: Changing Influence of Marine Environment on Campbeltown

The graph charts the decline of the post-war steamer traffic and fishing industry before a mini-revival of boat building from 1969-1990. After the false dawn of the Ballycastle ferry was more decline before the arrival of Vestas and the potential resurgence of leisure cruising.

4.6.10 Conclusions

The main conclusions from this profile are:

- Population has grown significantly. This is above the Firth and Strathclyde average but in line with trends in the outer Firth;
- The population profile has aged significantly with a big increase in the retired population and a corresponding decrease in the working age population;
- Employment grew by 10% mainly due to increases in construction and public administration;
- Key sector employment fell by 4% although fishing and construction saw small absolute growth;
- Female employment did not grow as strongly as male;
- The business base grew but the key sector base shrank;
- Unemployment fell by 30% but the absolute change was only 51;
- Turnover and GVA grew but the proportion accounted for by key sectors fell;
- Much of the population work close to home;

- Fewer but more valuable fish were landed in Campbeltown in 2006.
- Campbeltown does not have any major tourist infrastructure or access points by sea.

The data analysis for Campbeltown is summarised in the SWOT analysis presented below.

STRENGTHS	WEAKNESSES
Recent £5m investment in New Quay Victorian architecture Strong community	Low skill economy, few employment opportunities and declining population Peripherality
OPPORTUNITIES	**THREATS**
New action plan for Campbeltown Waterfront housing attracts new residents New moorings attract more yachting Low cost housing	Declining population and lack of in-migration affects capacity to improve retailing, employment, etc

4.7 Clydebank

4.7.1 Introduction

Clydebank is defined by the following 1991 or 2003 Census Area Statistic (CAS) wards:

- 1991 frozen wards
  - 78UD02: Dalmuir/Central;
  - 78UD06: Kilbowie;
  - 78UD07: Kilbowie West;
  - 78UD05: Linnvale/Drumry;
  - 78UD03: Mountblow;
  - 78UD04: Parkhall;
  - 78UD01: Whitecrook
- 2003 CAS wards
  - 07C02: Dalmuir/Central;
  - 07C06: Kilbowie;
  - 07C07: Kilbowie West;
  - 07C05: Linnvale/Drumry;
  - 07C03: Mountblow;
  - 07C04: Parkhall;
  - 07C01: Whitecrook

4.7.2 Population

Table 4.44 reports the change in population of Clydebank from the 1991 Census to 2001 Census

Table 4.44: Clydebank Population by Age Group

	Children		Working Age (59/64)		Retired		All people
2001							
People	6003	20%	17,770	59%	6265	21%	30,038
Males	3116	22%	8834	63%	2023	14%	13,973
Females	2887	18%	8936	56%	4242	26%	16,065
1991 People	5,366	19%	16,807	58%	6,685	23%	25,858

Source: 1991 Census, 2001 Census

The Table shows that:

- The population has increased by 16%;
- The proportion of children has increased slightly from 19% to 20%;
- The working age population has increased slightly from 58% to 59%; and
- The retired population has decreased slightly from 23% to 21%.

4.7.3 Employment

Table 4.45 reports the change in employment in Clydebank from 2000–2005 by broad industrial group and by key sector. Figure 1, over, shows the %-age change in employment over this period.

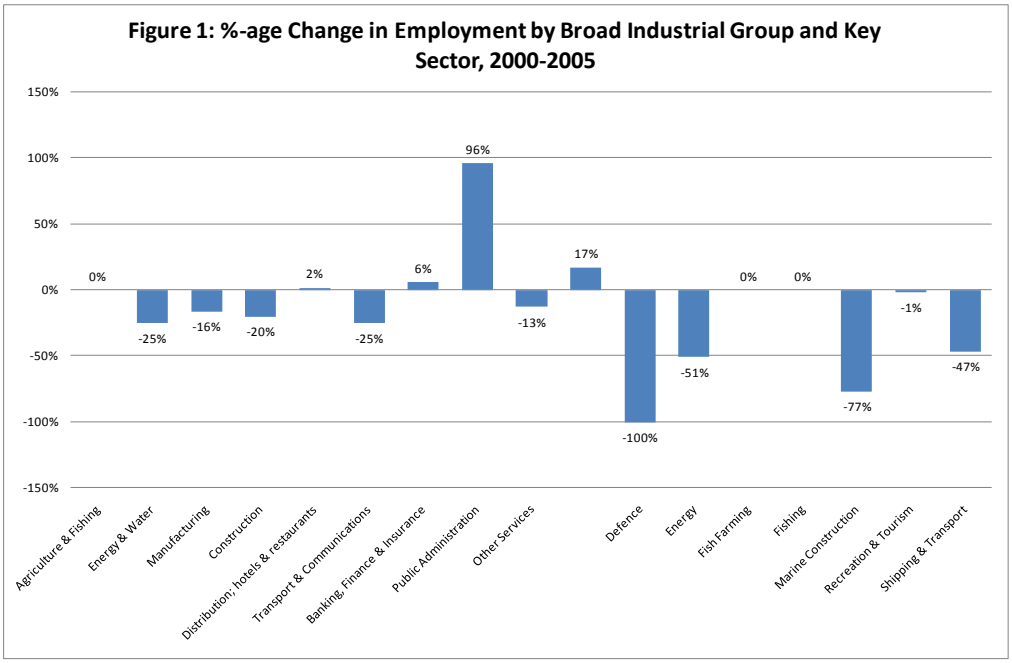
They show that:

- Public administration has become the most important employment group in Clydebank with 37% of all employees;
- Distribution/hotels is next with 24%, and banking/finance with 15%;
- total employment grew by 17% (2,040 jobs);
- public admin accounts for almost all employment growth;
- there was a decline in the majority of the key sectors, with marine construction losing 350 jobs;
- only recreation and tourism of the key sectors is an important employer;
- all key sectors contracted with a net loss of 31% (637 jobs).

Table 4.45: Clydebank Employment change 2000 - 2005

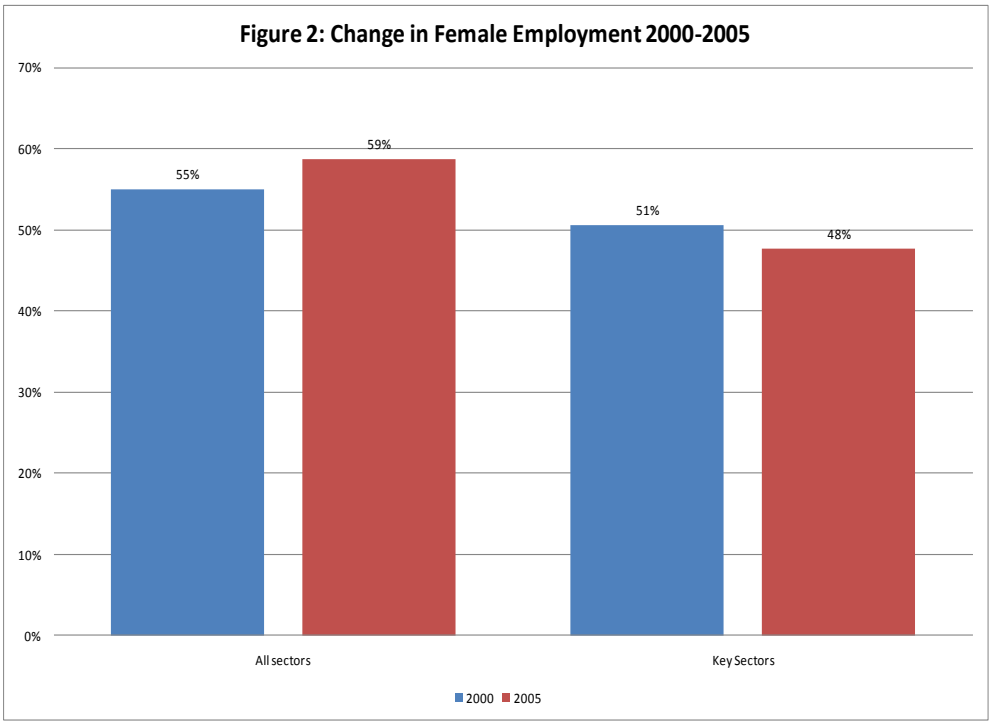
	2000	2005	Change
Agriculture & Fishing	0	14	14
Energy & Water	4	3	-1
Manufacturing	1,463	1,225	-238
Construction	1,064	853	-211
Distribution; hotels & restaurants	3,348	3,407	59
Transport & Communications	606	454	-152
Banking, Finance & Insurance	1,987	2,108	121
Public Administration	2,645	5,190	2545
Other Services	758	661	-97
Defence	1	0	-1
Energy	307	151	-156
Fish Farming	0	0	0
Fishing	0	0	0
Marine Construction	455	105	-350
Recreation & Tourism	1,012	998	-14
Shipping & Transport	248	132	-116

Source: ABI



Source: ABI

Figure 2 reports the change in female employment.



Source: ABI

It shows that:

- females increased as a majority of Clydebank's employees in all sectors;
- females appear to have suffered more from key sector employment decline than males as their share of the workforce has fallen by 3%.

4.7.4 Workplaces / Business Base

Table 4.46 reports the change in the workplace / business[31] base in Clydebank from 2000 – 2005. Figure 3 shows the %-age change in this base.

Table 4.46: Clydebank Business Base change 2000 - 2005

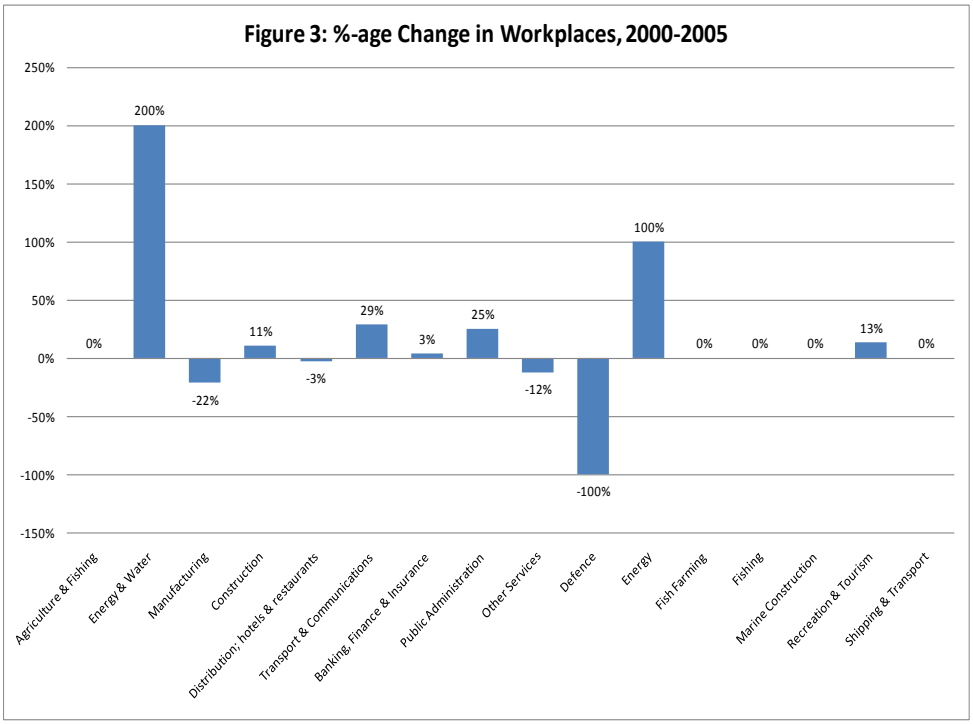
	2000	2005	Change
Agriculture & Fishing	0	1	1
Energy & Water	1	3	2
Manufacturing	74	58	-16
Construction	57	63	6
Distribution; hotels & restaurants	273	265	-8
Transport & Communications	28	36	8
Banking, Finance & Insurance	148	153	5
Public Administration	104	130	26
Other Services	81	71	-10
Defence	1	0	-1
Energy	2	4	2
Fish Farming	0	0	0
Fishing	0	0	0
Marine Construction	10	10	0
Recreation & Tourism	69	78	9
Shipping & Transport	7	7	0

Source: ABI

The Table data show:

- Distribution / hotels is still the largest business grouping (34%);
- Banking/finance is next with 20%;
- The business base has increased by 14 units (2%);
- In the sectors which have experienced growth, it is relatively small in absolute numbers; and
- Only recreation and tourism is significant of the key sectors.

[31] ABI workplaces are widely accepted as a proxy for the business base.



Source: ABI

4.7.5 Unemployment

Table 4.47 reports the absolute change in claimant count in Clydebank from September 2004–2007. Figure 4 shows the change in unemployment rates over the same period.

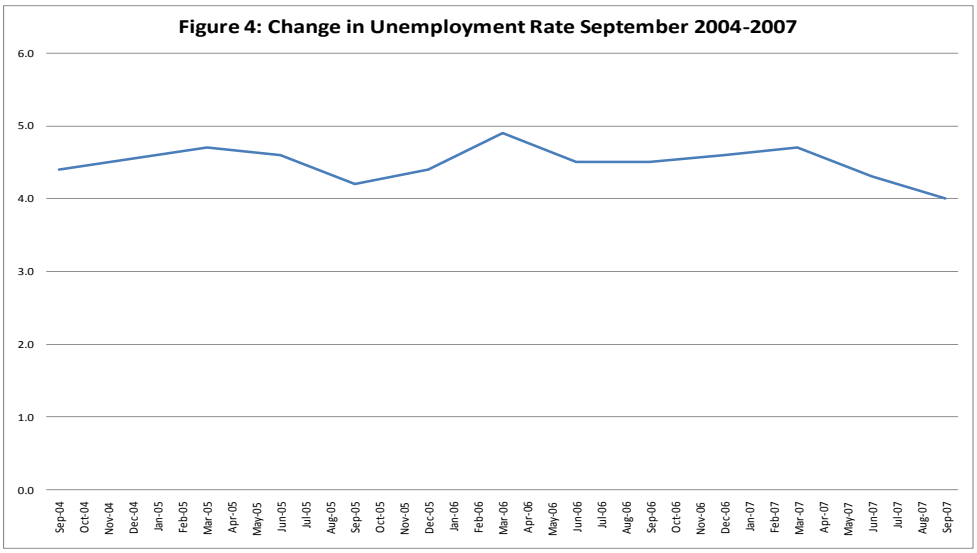
Table 4.47: Absolute Change in Unemployment September 2004 - 2007

2004	785
2005	753
2006	807
2007	718
Change	-67
% Change	-9%

Source: Claimant Count

The data show that:

- Unemployment has only fallen by a small proportion (9%) in three years;
- This is in contrast to the Firth and Strathclyde average; and
- The absolute change is relatively small.



Source: Claimant Count

4.7.6 Turnover

Table 4.48 reports turnover change by broad industrial group and key sector in Clydebank from 2000 – 2005.

The Table shows:

- Some sectors with contracting employment still show an increase in turnover;
- Increases are generally greater than the %-age change in employment due to changes in turnover / employee;
- Recreation/tourism and shipping/transport are the only two key sectors which show an increase in turnover;
- The energy sector saw turnover fall considerably; and
- Key sectors fell from 12% of total turnover in 2000 to 7% in 2005.

Table 4.48: Clydebank Turnover change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	%-age Change
Agriculture & Fishing	90,999	0.0	111,026	1.6	1.6	-
Energy & Water	90,999	0.4	111,026	0.3	0.0	-8
Manufacturing	137,310	200.9	149,693	183.4	-17.5	-9
Construction	73,596	78.3	103,312	88.1	9.8	13
Distribution; hotels etc	65,696	220.0	81,676	278.3	58.3	27
Transport & Communications	65,696	39.8	81,676	37.1	-2.7	-7
Banking, Finance etc	55,091	109.5	93,359	196.8	87.3	80
Public Administration	90,999	240.7	111,026	576.2	335.5	139
Other Services	65,696	49.8	81,676	54.0	4.2	8
Defence	65696	0.1	81676	0.0	-0.1	-100
Energy	90999	27.9	111026	16.8	-11.2	-40
Fish Farming	146612	0.0	106659	0.0	0.0	-
Fishing	146612	0.0	106659	0.0	0.0	-
Marine Construction	73,596	33.5	103312	10.8	-22.6	-68
Recreation & Tourism	35,900	36.3	56900	56.8	20.5	56
Shipping & Transport	50800	12.6	96200	12.7	0.1	1
Total Key Sectors		110.4		97.1	-13.3	-12
Total all employees		939.3		1415.8	476.5	51

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: Turnover data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

4.7.7 GVA

Table 4.49 reports GVA data for Clydebank from 2000–2005 by broad industrial group and key sector.

Table 4.49: Clydebank GVA change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	%-age change
Agriculture & Fishing	32,093	0.0	44,562	0.6	0.6	-
Energy & Water	32,093	0.1	44,562	0.1	0.0	4
Manufacturing	37,816	55.3	49,590	60.7	5.4	10
Construction	29,010	30.9	40,761	34.8	3.9	13
Distribution; hotels & restaurants	21,680	72.6	29,747	101.3	28.8	40
Transport & Communications	21,680	13.1	29,747	13.5	0.4	3
Banking, Finance & Insurance	32,963	65.5	38,547	81.3	15.8	24
Public Administration	32,093	84.9	44,562	231.3	146.4	172
Other Services	21,680	16.4	29,747	19.7	3.2	20
Defence	21,680	0.0	29,747	0.0	0.0	-100
Energy	32,093	9.9	44,562	6.7	-3.1	-32
Fish Farming	58,492	0.0	52,347	0.0	0.0	-
Fishing	58,492	0.0	52,347	0.0	0.0	-
Marine Construction	29,010	13.2	40,761	4.3	-8.9	-68
Recreation & Tourism	15,200	15.4	18,200	18.2	2.8	18
Shipping & Transport	21,600	5.4	33,900	4.5	-0.9	-16
Total Key Sectors		43.8		33.6	-10.2	-23
Total all employees		338.9		543.3	204.5	60

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: GVA data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

The data show that:

- All broad industrial groups show an increase in GVA;
- Increases are greater than the %-age changes in employment due to the greater change in GVA/employee;
- Recreation and tourism is the only key sector which shows an increase in GVA; and
- Key sectors have fallen from contributing 13% of Clydebank's GVA in 2000 to contributing 6% in 2005.

4.7.8 Marine / Port Related Activities

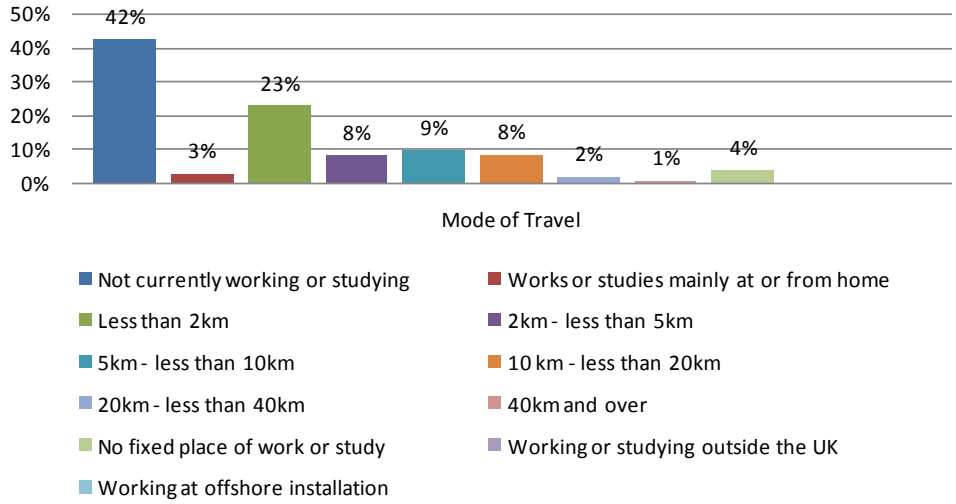
Commuting

Figures 4&5 show the mode and distance reported by those who normally travelled to a place of work or study on Census Day 2001.

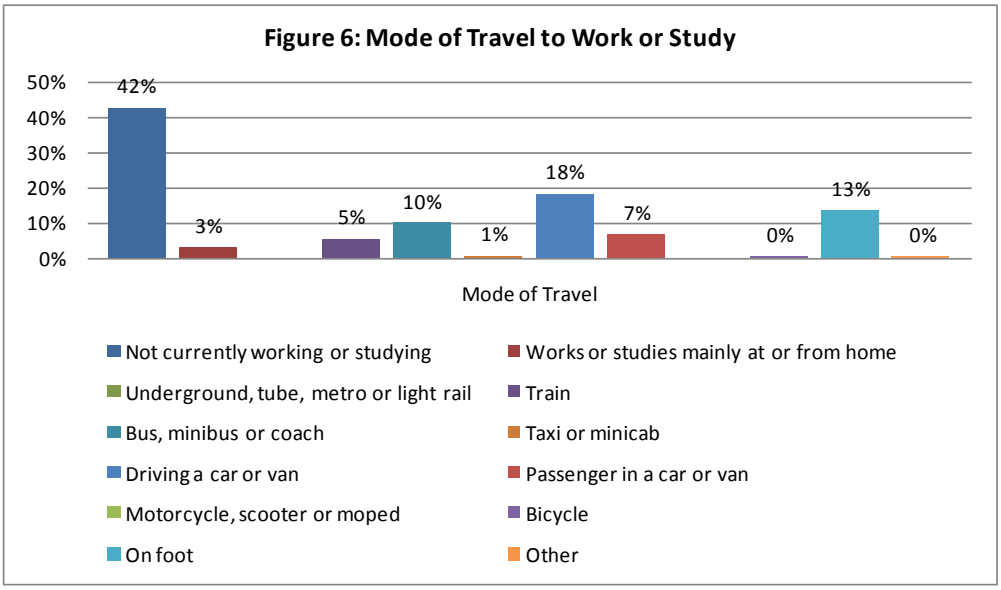
The Figures show that in 2001:

- 42% of the population did not work or study;
- 43% did so within 10km of home;
- 3% travelled more than 20km to work;
- 26% travelled as diver or passenger in a car, van or taxi.

Figure 5: Distance Travelled to Work or Study



Source: 2001 Census



Source: 2001 Census

Fish Landings

There are no recorded fish landings at Clydebank.

Boating & Sailing

Table 4.50 reports the number of berths and moorings available in Clydebank and the Firth of Clyde.

Table 4.50: Available Berths and Moorings

	Current		Proposed	
	Clydebank	Clyde	Clydebank	Clyde
Berths	0	2674	20	5376
Moorings	0	26	0	163
Total	0	2700	20	5539

Source: Clyde Sailing Study

It shows that:

- Clydebank currently has no official facilities for touring boats;
- Some development of this kind is planned but it is not significant within a Firth of Clyde context.

Tourism

Clydebank has no attractions ranked among the Top 20 paid or free attractions in Scotland in 2005. Nor does it have any attractions listed as

among the most popular in the AILLST area. However, it does offer east access to attractions in Glasgow and around Loch Lomond.

Ferry Activity

There are no ferry connections to / from Clydebank

4.7.9 Change Over Time and Potential Projects

Clydebank used to be famous for shipbuilding, however over the past 50 years this has become obsolete. By 1945 John Brown's shipyard had five huge slipways, on which its last group of five large passenger ships was built in 1946-49. The final sizeable naval vessel built by John Brown of Clydebank was the assault ship HMS Intrepid of 12,150 tons in 1964. The last liner was the QE2 the yard's final vessel was bulk carrier Ailsa in 1972. Oil rig construction replaced shipbuilding and the yard survived into the 21st century before final closure. Ore imports to Rothesay Docks declined with the opening of the Hunterston terminal. Other major engineering employers suffered decline too and Clydebank became an Enterprise Zone in the1980s with a new business park on the former Singer site. Recent redevelopment has focused on the ambitious Clyde Waterfront regeneration initiative.

Clydebank Waterfront is a bold plan to regenerate 450 acres between the former John Brown's shipyard and the Erskine Bridge. It includes the Queens Quays Enterprise and Learning District, with a new college campus, housing development on the Waterfront and continuing public realm projects within Town Centre. There are also further proposals for upgrading of Forth & Clyde Canal, a sports venue at QQ and a small number (20) new sailing berths.

A subjective view of the changing influence of the marine environment on Clydebank is presented in the graph below.

The graph charts the decline of shipbuilding and dock employment since the 1970s – if not earlier – before the current plans for the redevelopment of significant stretches of brownfield, former industrial sites along the Waterfront for mixed, residential, employment, educational and leisure use.

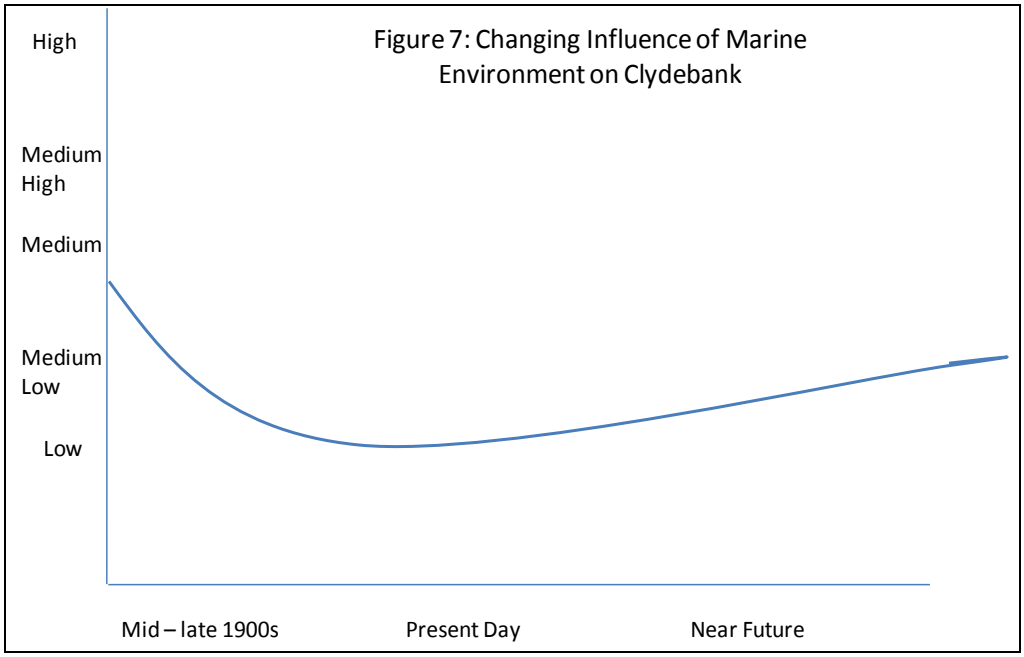


Figure 7: Changing Influence of Marine Environment on Clydebank

4.7.10 Conclusions

The main conclusions from this profile are:

- Population has increased significantly more than the Firth or Strathclyde average;
- Population is not subject to the same ageing profile as other areas – more children and fewer old people;
- Employment grew significantly by 17% from 2000 – 2005;
- Almost all of this is accounted for by growth in public administration;
- Key sectors all showed a fall in employment with a net loss of 31%;
- Female presence in the employee workforce grew to 59%, suggesting they benefited more than males from overall employment growth;
- In key sectors the proportion of females in employment fell, suggesting they suffered more than males;
- There was slight growth in the business base;
- Unemployment did not change significantly;
- Total turnover and GVA grew but that of key sectors fell;
- Only a small proportion of the resident population travels more than 20km to work;

- Clydebank does not have a particular tourism focus or offer of its own;
- Clydebank has few direct current connections with maritime activity.

The data analysis for Clydebank is summarised in the SWOT analysis presented below.

STRENGTHS	WEAKNESSES
Physical location – proximity to Clyde estuary and attractive hinterland as well as Glasgow. Proximity to Glasgow Airport Major investment through Clydebank Rebuilt URC	Little to offer tourists Declining, ageing and low-qualified population
OPPORTUNITIES	**THREATS**
Significant waterfront development provides employment opportunities Extensive private housing development will attract new residents and reverse decline in population Forth & Clyde Canal Corridor tourism development Transport improvements – Yoker relief road and rail links	Continuing negative perception of Clydebank as place to live and work

4.8 Dumbarton

4.8.1 Introduction

Dumbarton is defined by the following 1991 or 2003 Census Area Statistic (CAS) wards:

- 1991 frozen wards
  - 78UJ02: Dumbarton Central;
  - 78UJ03: Dumbarton North;
  - 78UJ04: Dumbarton South;
  - 78UJ01: Dumbarton West;
  - 78UJ05: Dumbarton/Bowling.
- 2003 CAS wards
  - 07C13: Barloan/Overtoun;
  - 07C15: Dumbarton Central;
  - 07C12: Dumbarton East;
  - 07C14: Dumbarton North;
  - 07C16: Dumbarton West.

4.8.2 Population

Table 4.51 reports the change in population of Dumbarton from the 1991 Census to 2001 Census.

Table 4.51: Dumbarton Population by Age Group

	Children		Working Age (59/64)		Retired		All people
2001							
People	4117	20%	13,133	62%	3773	18%	21,023
Males	2137	21%	6772	67%	1190	12%	10,099
Females	1980	18%	6361	58%	2583	24%	10,924
1991 People	5,266	22%	14,503	61%	4,158	17%	23,927

Source: 1991 Census, 2001 Census

The Table shows that:

- The population has decreased by 12%;

- The proportion of children has decreased slightly from 22% to 20%;
- The working age population has increased slightly from 61% to 62%; and
- The retired population has increase slightly from 17% to 18%.

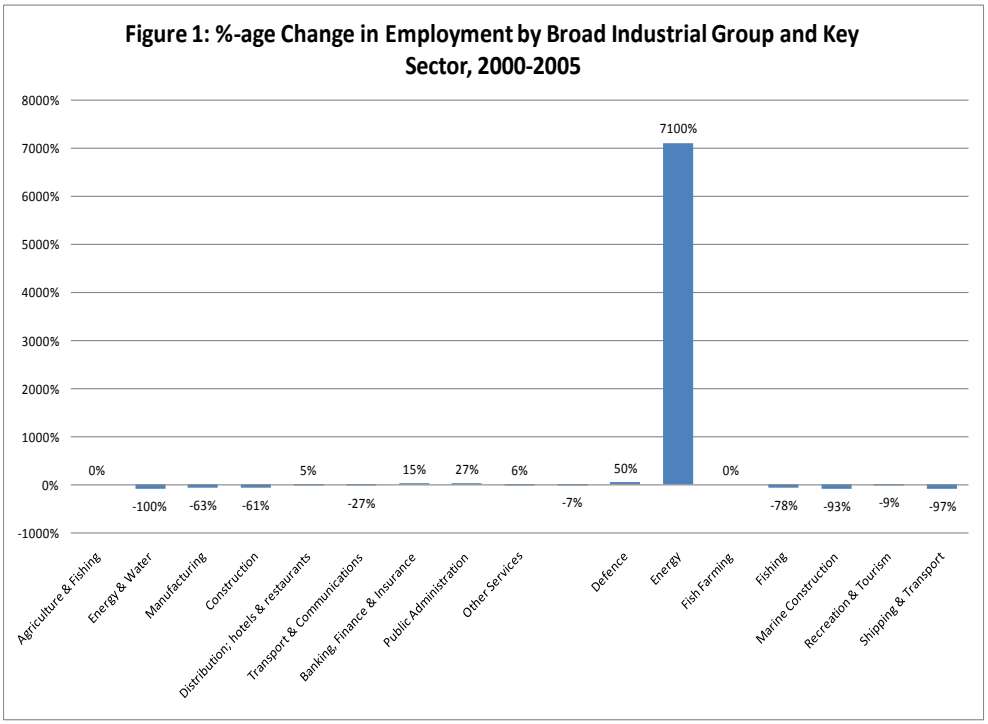
4.8.3 Employment

Table 5.52 reports the change in employment in Dumbarton from 2000–2005 by broad industrial group and by key sector. Figure 1, over, shows the %-age change in employment over this period.

- Public administration remains the most important employment group in Dumbarton with 19% of all employees;
- Distribution/hotels is next with 15%;
- total employment fell by 7% (-534 jobs);
- there was a significant decline in manufacturing, marine construction and construction employment;
- only recreation and tourism of the key sectors is an important employer; and
- there was a net loss of 42% (799 jobs) from the key sectors.

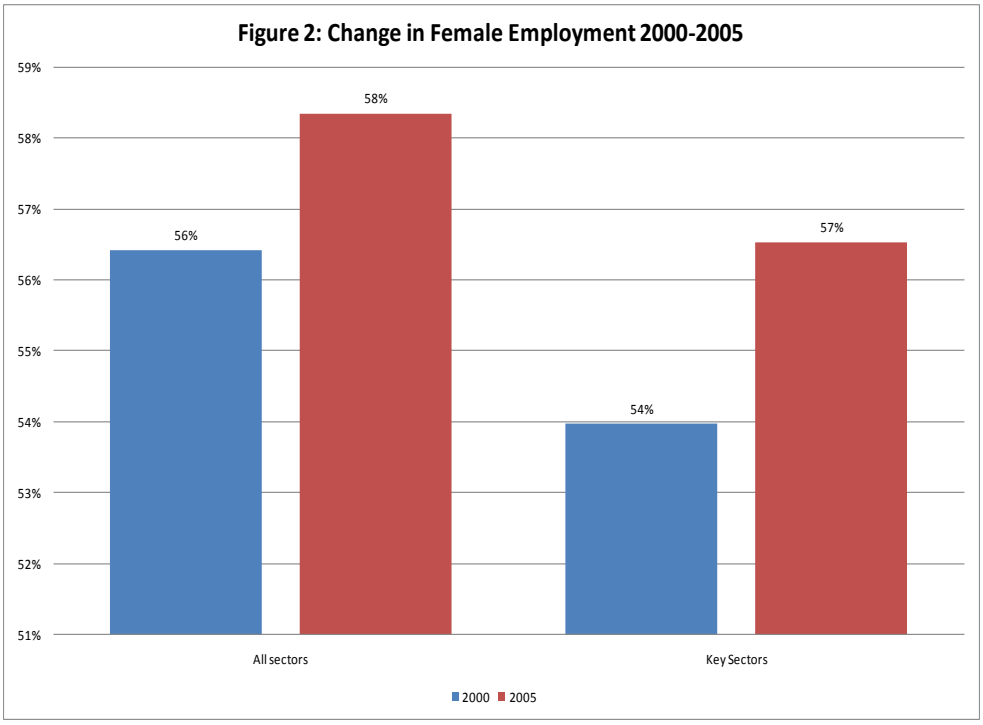
Table 4.52: Dumbarton Employment change 2000 - 2005

	2000	2005	Change
Agriculture & Fishing	0	0	0
Energy & Water	55	0	-55
Manufacturing	954	353	-601
Construction	904	357	-547
Distribution; hotels & restaurants	1,962	2,055	93
Transport & Communications	481	352	-129
Banking, Finance & Insurance	746	861	115
Public Administration	2,059	2,618	559
Other Services	498	529	31
Defence	4	6	2
Energy	1	72	71
Fish Farming	0	0	0
Fishing	9	2	-7
Marine Construction	589	41	-548
Recreation & Tourism	1,068	975	-93
Shipping & Transport	230	6	-224



Source: ABI

Figure 2 reports the change in female employment.



Source: ABI

It shows that:

- females now make up a bigger majority of Dumbarton's employees;
- males have not benefitted from overall employment growth as much as females; and
- in key sectors the proportion of females in employment has increased by 3%.

4.8.4 Workplaces / Business Base

Table 4.53 reports the change in the workplace / business[32] base in Dumbarton from 2000 – 2005. Figure 3 shows the %-age change in this base.

Table 4.53: Dumbarton Business Base change 2000 - 2005

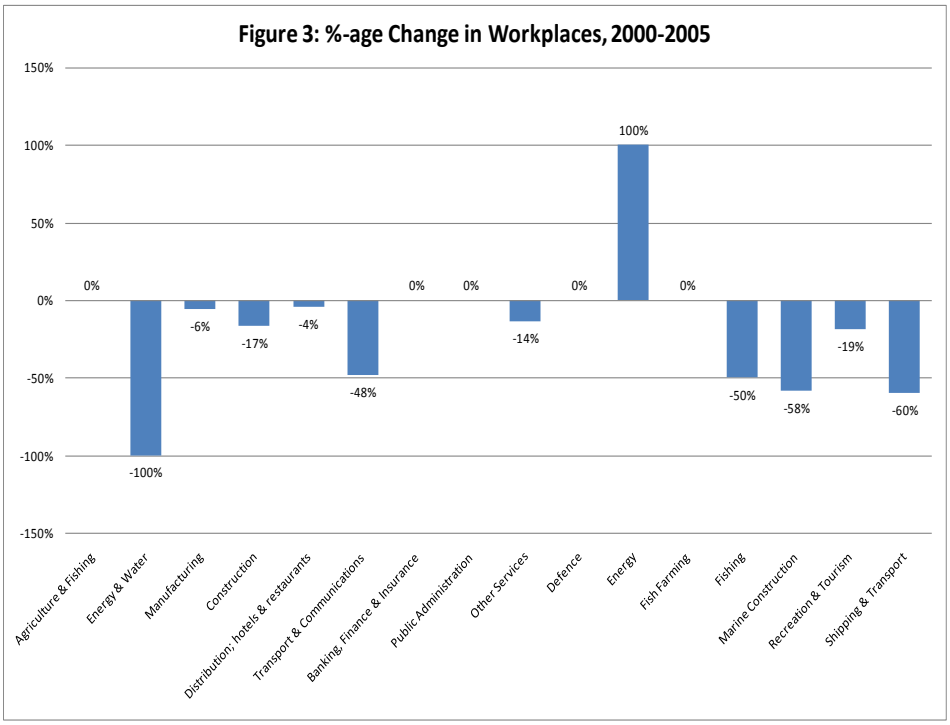
	2000	2005	Change
Agriculture & Fishing	0	0	0
Energy & Water	5	0	-5
Manufacturing	33	31	-2
Construction	36	30	-6
Distribution; hotels & restaurants	186	178	-8
Transport & Communications	29	15	-14
Banking, Finance & Insurance	88	88	0
Public Administration	91	91	0
Other Services	59	51	-8
Defence	1	1	0
Energy	1	2	1
Fish Farming	0	0	0
Fishing	2	1	-1
Marine Construction	12	5	-7
Recreation & Tourism	74	60	-14
Shipping & Transport	5	2	-3

Source: ABI

The Table data show:

- Distribution / hotels is still the largest business grouping (37%);
- Public admin is next with 19%;
- The business base decreased by 43 units (8%);
- Only energy recorded any growth;
- Only recreation and tourism is significant of the key sectors, however it experienced a decline of 14 units over the intervening period.

[32] ABI workplaces are widely accepted as a proxy for the business base.


Figure 3: %-age Change in Workplaces, 2000-2005
150%
100%
50%
0%
-50%
-100%
-150%
0%
-100%
-6%
-17%
-4%
-48%
0%
0%
-14%
0%
100%
0%
-50%
-58%
-19%
-60%
Agriculture & Fishing
Energy & Water
Manufacturing
Construction
Distribution; hotels & restaurants
Transport & Communications
Banking, Finance & Insurance
Public Administration
Other Services
Defence
Energy
Fish Farming
Fishing
Marine Construction
Recreation & Tourism
Shipping & Transport

Source: ABI

4.8.5 Unemployment

Table 4.54 reports the absolute change in claimant count in Dumbarton from September 2004–2007. Figure 4 shows the change in unemployment rates over the same period.

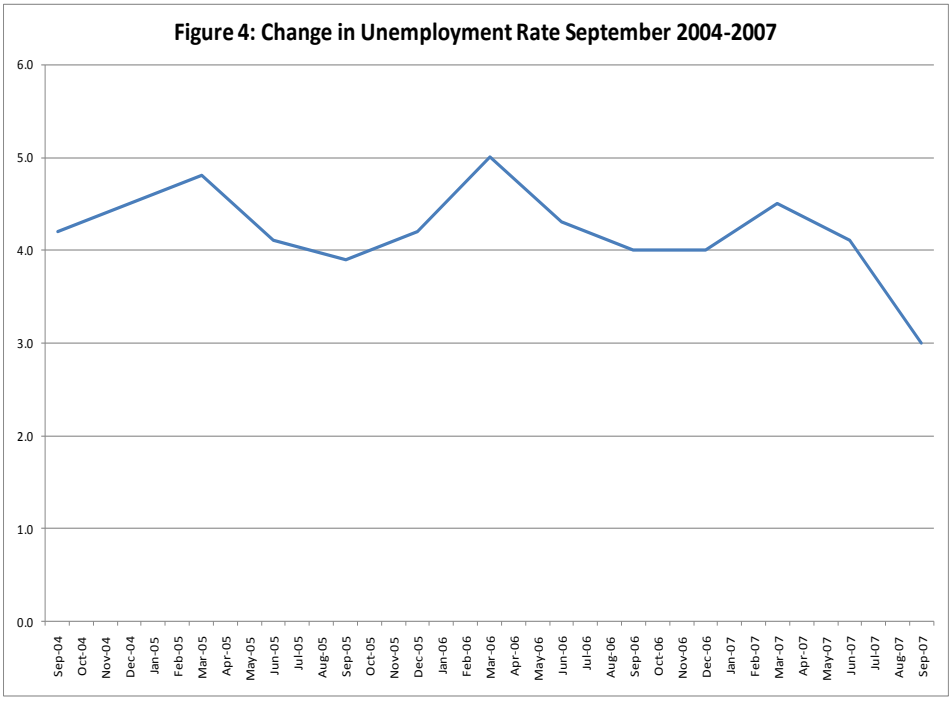
Table 4.54: Absolute Change in Unemployment September 2004 - 2007

2004	549
2005	506
2006	524
2007	398
Change	-151
% Change	-28%

Source: Claimant Count

The data show that:

- Unemployment has fallen by more than a quarter in three years;
- The absolute change is relatively large.



Source: Claimant Count

4.8.6 Turnover

Table 4.55 reports turnover change by broad industrial group and key sector in Dumbarton from 2000 – 2005.

Table 4.55: Dumbarton Turnover change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	%-age Change
Agriculture & Fishing	90,999	0.0	111,026	0.0	0.0	-
Energy & Water	90,999	5.0	111,026	0.0	-5.0	-100
Manufacturing	137,310	131.0	149,693	52.8	-78.2	-60
Construction	73,596	66.5	103,312	36.9	-29.6	-45
Distribution; hotels & restaurants	65,696	128.9	81,676	167.8	38.9	30
Transport & Communications	65,696	31.6	81,676	28.8	-2.8	-9
Banking, Finance & Insurance	55,091	41.1	93,359	80.4	39.3	96
Public Administration	90,999	187.4	111,026	290.7	103.3	55
Other Services	65,696	32.7	81,676	43.2	10.5	32
Defence	65696	0.3	81676	0.5	0.2	86
Energy	90999	0.1	111026	8	7.9	8658
Fish Farming	146612	0.0	106659	0.0	0.0	-
Fishing	146612	1.3	106659	0.2	-1.1	-84
Marine Construction	73,596	43.3	103312	4.2	-39.1	-90
Recreation & Tourism	35,900	38.3	56900	55.5	17.1	45
Shipping & Transport	50800	11.7	96200	0.6	-11.1	-95
Total Key Sectors		95.0		69	-26.1	-27
Total all employees		624.2		700.6	76.4	12

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: Turnover data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

The Table shows:

- Increases in turnover in the same groups reporting increase in employment;
- Increases are generally greater than the %-age change in employment due to changes in turnover / employee;
- Defence, energy and recreation/tourism are the only key sectors which show increases in turnover; and
- Key sectors decreased from 15% of total turnover in 2000 to 10% in 2005.

4.8.7 GVA

Table 4.56 reports GVA data for Dumbarton from 2000–2005 by broad industrial group and key sector.

Table 4.56: Dumbarton GVA change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	%-age change
Agriculture & Fishing	32,093	0.0	44,562	0.0	0.0	-
Energy & Water	32,093	1.8	44,562	0.0	-1.8	-100
Manufacturing	37,816	36.1	49,590	17.5	-18.6	-51
Construction	29,010	26.2	40,761	14.6	-11.7	-45
Distribution; hotels & restaurants	21,680	42.5	29,747	61.1	18.6	44
Transport & Communications	21,680	10.4	29,747	10.5	0.0	0
Banking, Finance & Insurance	32,963	24.6	38,547	33.2	8.6	35
Public Administration	32,093	66.1	44,562	116.7	50.6	77
Other Services	21,680	10.8	29,747	15.7	4.9	46
Defence	21,680	0.1	29,747	0.2	0.1	106
Energy	32,093	0.0	44,562	3.2	3.2	9897
Fish Farming	58,492	0.0	52,347	0.0	0.0	-
Fishing	58,492	0.5	52,347	0.1	-0.4	-80
Marine Construction	29,010	17.1	40,761	1.7	-15.4	-90
Recreation & Tourism	15,200	16.2	18,200	17.7	1.5	9
Shipping & Transport	21,600	5.0	33,900	0.2	-4.8	-96
Total Key Sectors		38.9		23.1	-15.8	-41
Total all employees		218.5		269.2	50.7	23

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: GVA data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

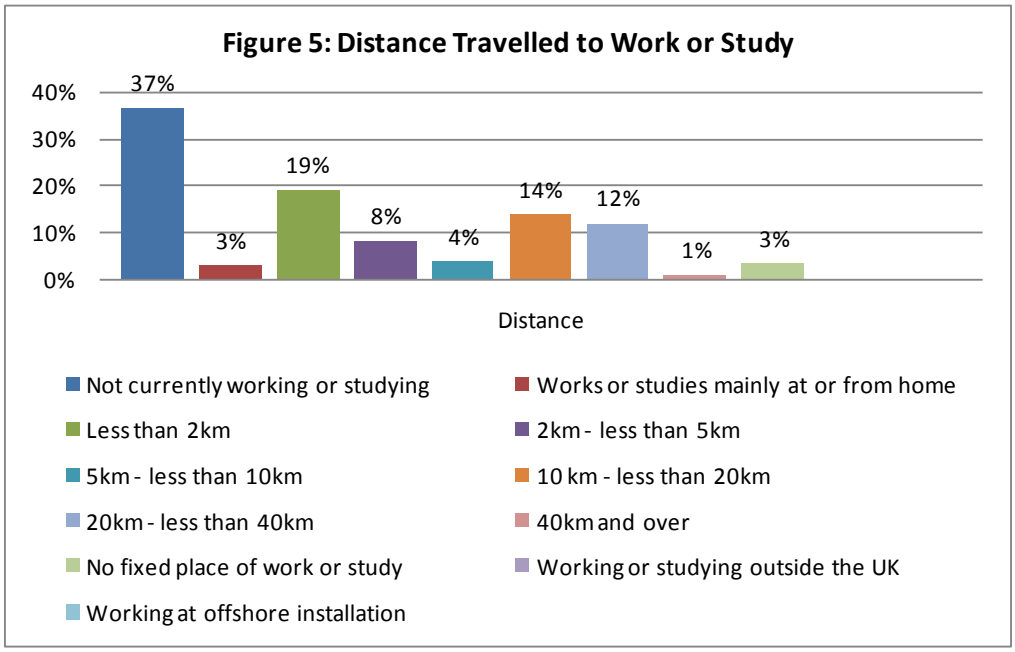
The data show that:

- GVA has increased in the same groups that showed an increase in employment;
- Increases are greater than the %-age changes in employment due to the greater change in GVA/employee;
- Defence, energy and recreation/tourism are the only key sectors which show an increase in GVA; and
- Key sectors have halved from contributing 18% of Dumbarton's GVA in 2000 to contributing 9% in 2005.

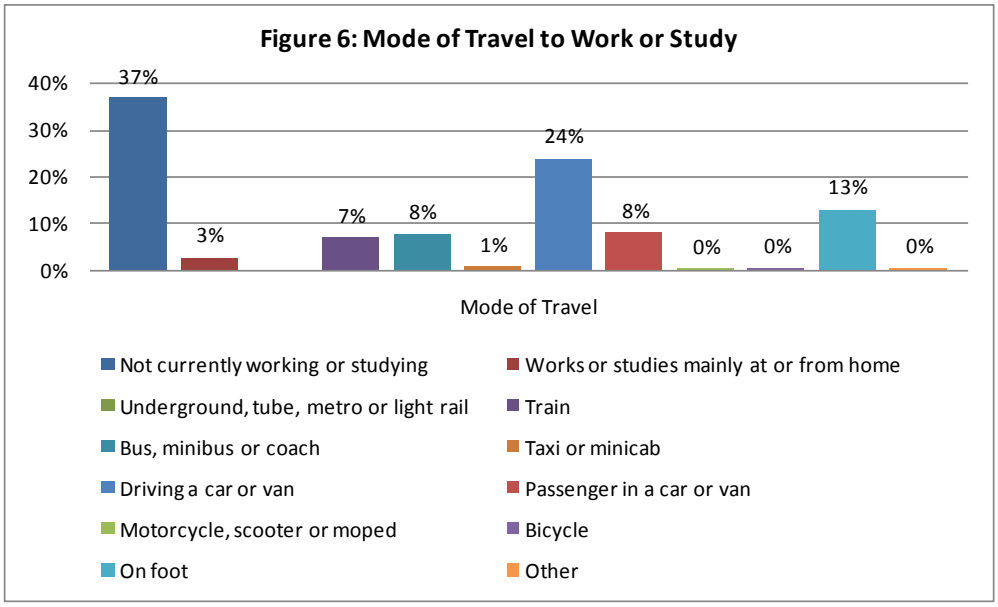
4.8.8 Marine / Port Related Activities

Commuting

Figures 4&5 show the mode and distance reported by those who normally travelled to a place of work or study on Census Day 2001.



Source: 2001 Census



Source: 2001 Census

The Figures show that in 2001:

- 37% of the population did not work or study;
- 34% did so within 10km of home;
- 13% travelled more than 20km to work;
- 33% travelled as driver or passenger in a car, taxi or van

Fish Landings

There are no recorded fish landings at Dumbarton.

Boating & Sailing

Table 4.57 reports the number of berths and moorings available in Dumbarton and the Firth of Clyde.

Table 4.57: Available Berths and Moorings

	Current		Proposed	
	Dumbarton	Clyde	Dumbarton	Clyde
Berths	25	2674	0	5376
Moorings	0	26	0	163
Total	0	2700	0	5539

Source: Clyde Sailing Study

The Table shows that:

- Dumbarton is not significant in current provision;
- There are no plans to improve provision in Dumbarton.

Tourism

Dumbarton is well placed to allow access to Loch Lomond National Park and to Glasgow city. The settlement has no attractions ranked among the Top 20 paid or free attractions in Scotland but it does have two listed among the most visited in the AILLST area:

- Dumbarton Castle with 12785 visitors; and
- Denny Tank Museum with 2249.

Ferry Activity

There are no ferry services to / from Dumbarton.

4.8.9 Change Over Time and Potential Projects

Dumbarton used to be famous for shipbuilding however the Denny shipyard closed in 1963 and the other remaining smaller shipyards closed over the next few decades. The last surviving part of the Denny's shipbuilding company is the Denny Ship Model Experiment Tank which forms part of the Scottish Maritime Museum.

Current development proposals - Dumbarton Waterfront Design Framework – link development from Town Centre to Dumbarton Castle, reconnecting the town centre with the riverfront. A major mixed use development on the site of the former J&B bottling plant on the outskirts of Dumbarton is planned by Strathleven Regeneration providing 300 homes and a combination of business and roadside services.

A subjective view of the changing influence of the marine environment on Dumbarton is presented in the graph below.

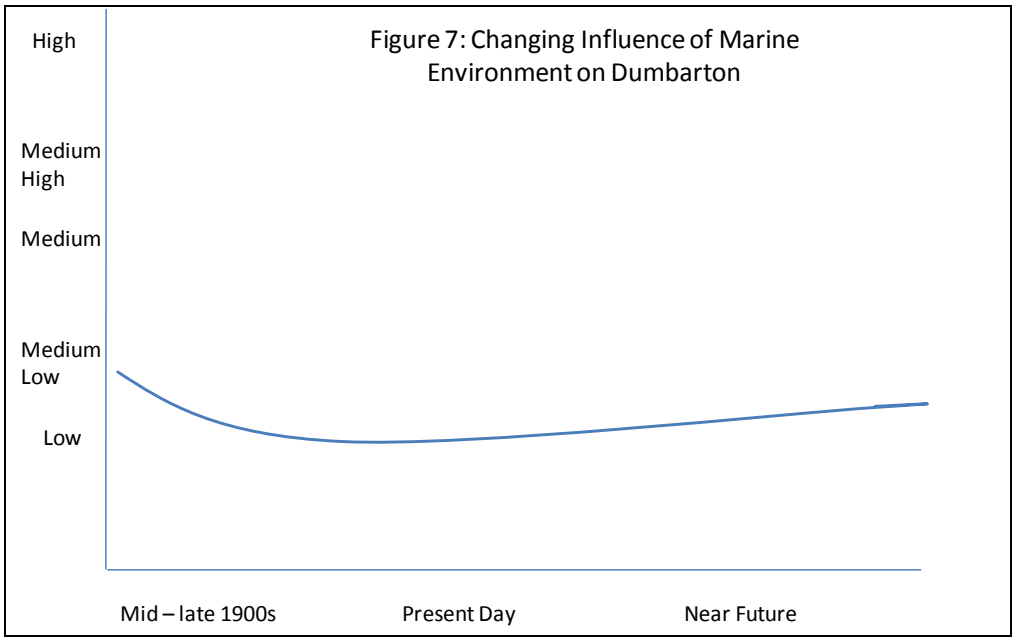


Figure 7: Changing Influence of Marine Environment on Dumbarton

The graph charts the decline of the Denny shipyard in the 20 years after the war. Little other employment was directly concerned with the maritime environment but current regeneration proposals see the riverfront as a means of retaining or attraction a residential and business population in the town.

4.8.10 Conclusions

The main conclusions from this profile are:

- Population decline is counter to the Strathclyde, Firth of Clyde and outer firth trends;

- The area has an older age profile – fewer children and more retired people;
- Employment decline is also against regional trends;
- Key sectors record a much greater loss of employment than industry as a whole;
- There was widespread decline in the business base too;
- Female employment has not suffered as much as male;
- Unemployment has fallen more than the regional averages;
- Despite employment decline turnover and GVA increased. This is due to increases in output per employee;
- A significant proportion travel more than 20km to work or study (13%);
- No major maritime or sailing activity is centred on Dumbarton.

The data analysis for Dumbarton is summarised in the SWOT analysis presented below.

STRENGTHS	WEAKNESSES
Investment in town centre Proximity to Loch Lomond	Lack of local jobs Limited berthing and harbour facilities
OPPORTUNITIES	**THREATS**
Better use of waterfront, including residential development Development around Dumbarton Castle Link Castle to Town Centre Improve mix of retail and leisure facilities to serve increased population Development of J&B bottling plant	Insufficient investment does not attract new residents and employment

4.9 Dunoon

4.9.1 Introduction

Dunoon is defined by the following 1991 or 2003 Census Area Statistic (CAS) wards:

- 1991 frozen wards
  - 78UB23: Ardenslate;
  - 78UB25: Auchamore and Innellan;
  - 78UB22: Kirn and Hunters Quay;
  - 78UB24: Milton.
- 2003 CAS wards
  - 04C23: Ardenslate;
  - 04C25: Auchamore and Innellan;
  - 04C22: Kirn and Hunter's Quay;
  - 04C24: Milton.

4.9.2 Population

Table 4.58 reports the change in population of Dunoon from the 1991 Census to 2001 Census

Table 4.58: Dunoon Population by Age Group

	Children		Working Age (59/64)		Retired		All people
2001							
People	1860	18%	5524	55%	2678	27%	10,062
Males	935	20%	2844	61%	916	20%	4,695
Females	925	17%	2680	50%	1762	33%	5,367
1991 People	2,263	21%	6,019	56%	2,436	23%	10,718

Source: 1991 Census, 2001 Census

The Table shows that:

- The population has decreased by 6%;
- The proportion of children has decreased slightly from 21% to 18%;

- The working age population has decreased slightly from 56% to 55%; and

- The retired population has increased from 23% to 27%.

4.9.3 Employment

Table 4.59 reports the change in employment in Dunoon from 2000–2005 by broad industrial group and by key sector. Figure 1, over, shows the %-age change in employment over this period.

- Public administration remains the most important employment group in Dunoon with 52% of all employees;

- Distribution/hotels is next with 24%;

- total employment grew by 2% (64 jobs) mainly due to growth of a third (435) in public administration employment;

- there was a decline in distribution/hotels, and construction amongst others;

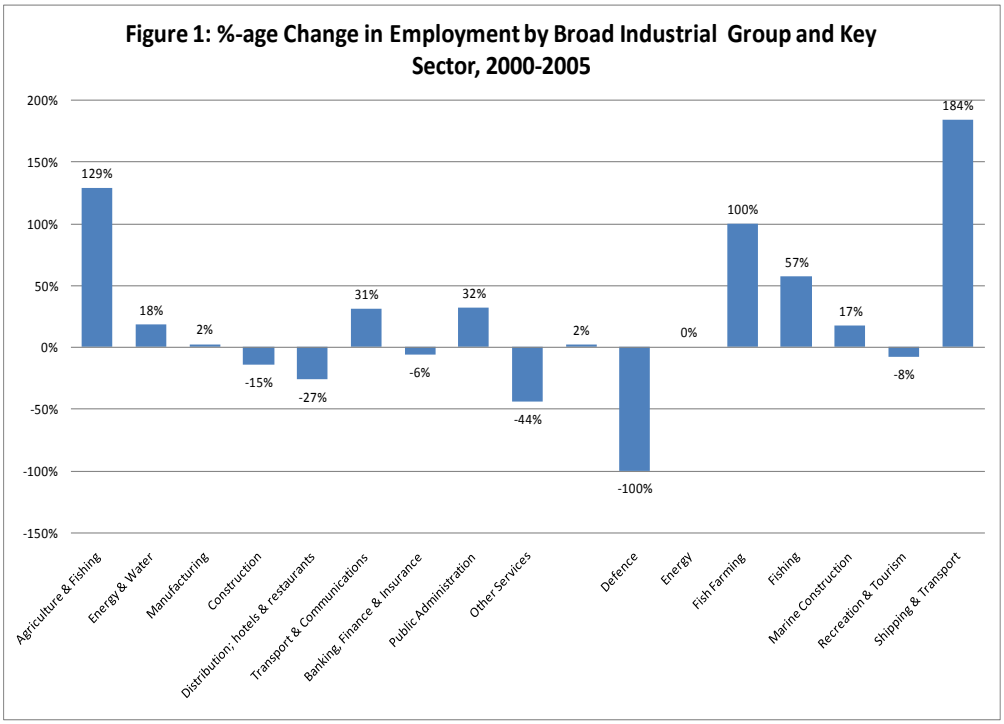
- other services employment fell by 44% - 97 employees;

- despite some decline over the period, only recreation and tourism of the key sectors is an important employer; and

- there was a net increase of 6% (36 jobs) from the key sectors.

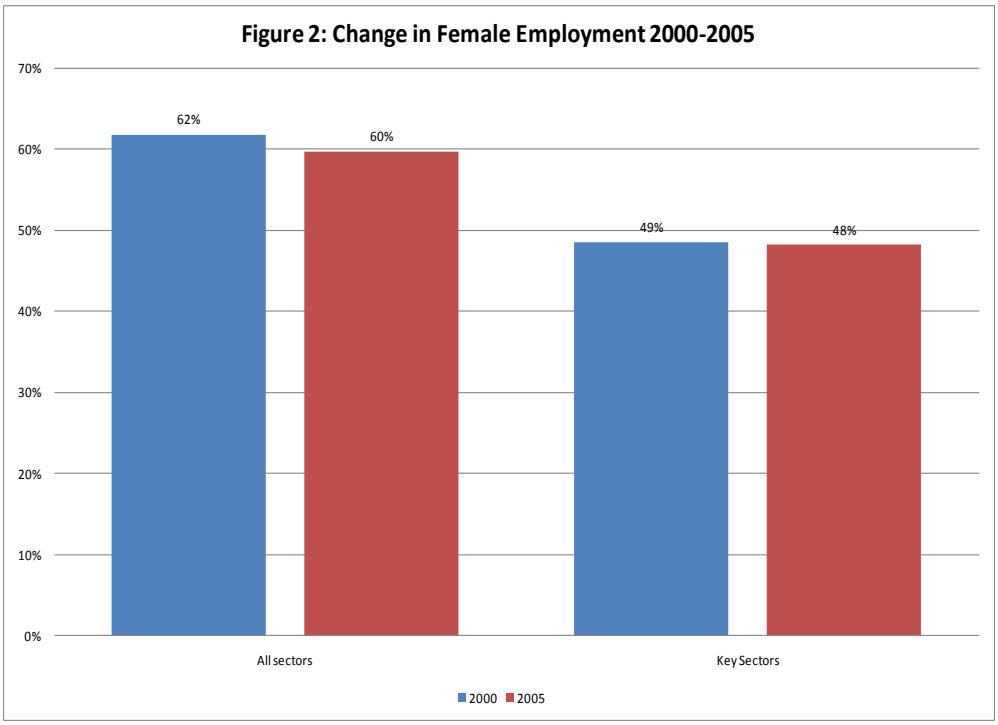
Table 4.59: Dunoon Employment change 2000 - 2005

	2000	2005	Change
Agriculture & Fishing	14	32	18
Energy & Water	11	13	2
Manufacturing	42	43	1
Construction	238	203	-35
Distribution; hotels & restaurants	1,105	812	-293
Transport & Communications	151	198	47
Banking, Finance & Insurance	217	203	-14
Public Administration	1,353	1,788	435
Other Services	218	121	-97
Defence	18	0	-18
Energy	0	10	10
Fish Farming	12	24	12
Fishing	7	11	4
Marine Construction	116	136	20
Recreation & Tourism	469	431	-38
Shipping & Transport	25	71	46



Source: ABI

Figure 2 reports the change in female employment.



Source: ABI

It shows that:

- females now make up a smaller proportion of Dunoon's employees but are still a sizeable majority;
- females have not benefitted from overall employment growth as much as males; and
- in key sectors the proportion of females in employment has decreased by 1%, suggesting that most new employment went to males.

4.9.4 Workplaces / Business Base

Table 4.60 reports the change in the workplace / business[33] base in Dunoon from 2000 – 2005. Figure 3 shows the %-age change in this base.

Table 4.60: Dunoon Business Base change 2000 - 2005

	2000	2005	Change
Agriculture & Fishing	3	5	2
Energy & Water	2	2	0
Manufacturing	12	9	-3
Construction	39	33	-6
Distribution; hotels & restaurants	163	150	-13
Transport & Communications	18	16	-2
Banking, Finance & Insurance	59	58	-1
Public Administration	53	58	5
Other Services	44	29	-15
Defence	2	0	-2
Energy	0	1	1
Fish Farming	1	1	0
Fishing	3	4	1
Marine Construction	14	13	-1
Recreation & Tourism	60	59	-1
Shipping & Transport	5	4	-1

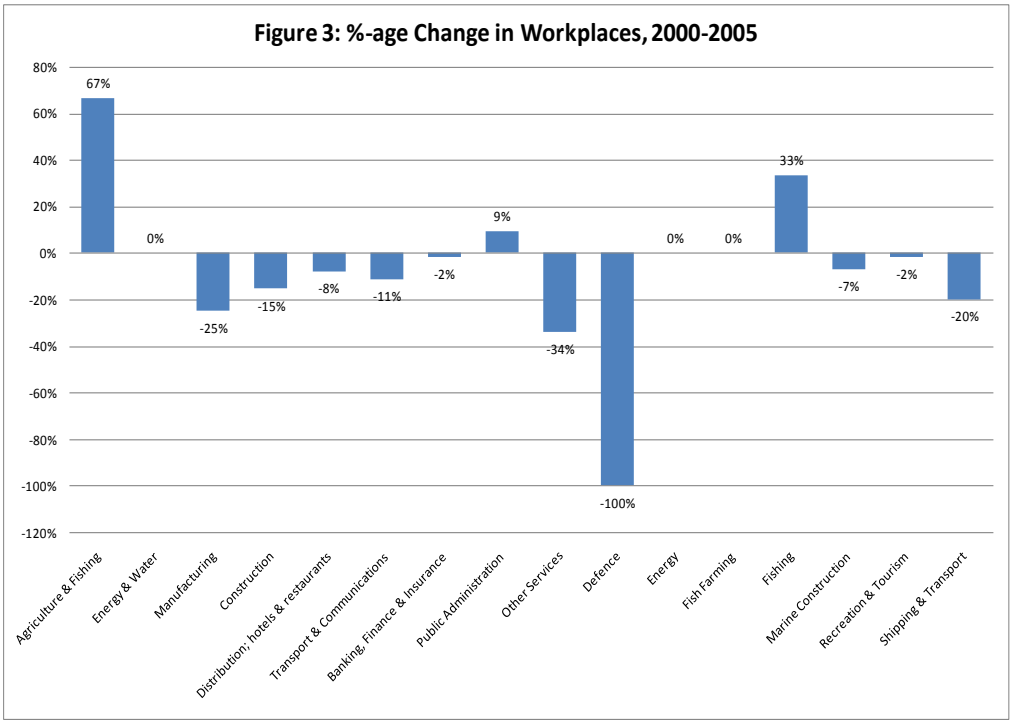
Source: ABI

The Table data show:

- Distribution / hotels is still the largest business grouping (42%);
- Public admin and banking/finance are next with 16%;
- The business base decreased by 33 units (8%);
- Only agriculture, public admin, energy and fishing recorded any growth;

[33] ABI workplaces are widely accepted as a proxy for the business base.

- Only recreation and tourism is significant of the key sectors, however it experienced a decline of 1 unit over the intervening period.



Source: ABI

4.9.5 Unemployment

Table 4.61 reports the absolute change in claimant count in Dunoon from September 2004–2007. Figure 4 shows the change in unemployment rates over the same period.

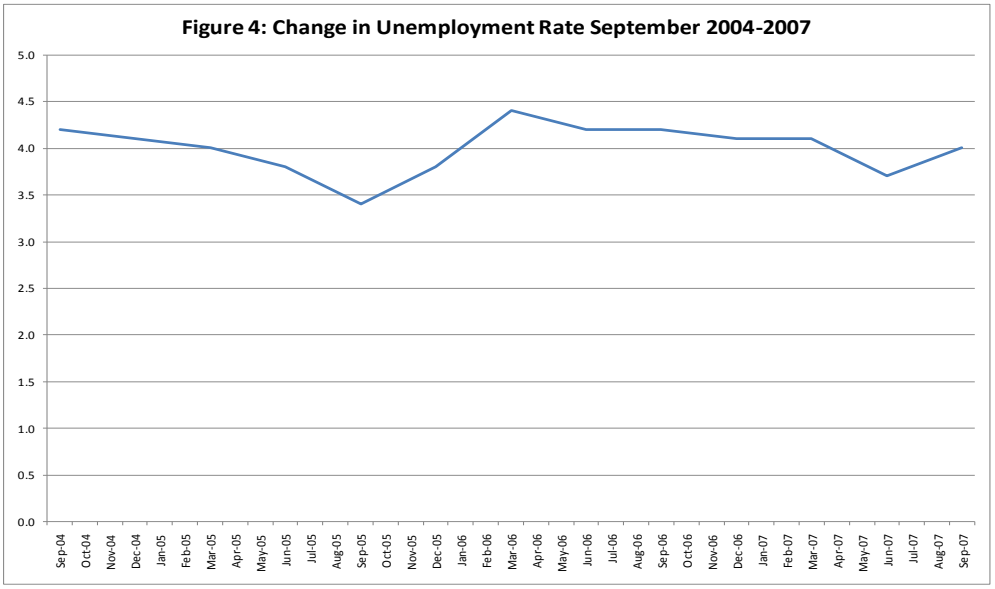
Table 4.61: Absolute Change in Unemployment September 2004 - 2007

2004	234
2005	185
2006	234
2007	222
Change	-12
% Change	-5%

Source: Claimant Count

The data show that:

- Unemployment has fallen by a small proportion (-5%) in three years;
- The absolute change is relatively small.



Source: Claimant Count

4.9.6 Turnover

Table 4.62 reports turnover change by broad industrial group and key sector in Dunoon from 2000 – 2005.

Table 4.62: Dunoon Turnover change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	%-age Change
Agriculture & Fishing	90,999	1.3	111,026	3.6	2.3	179
Energy & Water	90,999	1.0	111,026	1.4	0.4	44
Manufacturing	137,310	5.8	149,693	6.4	0.7	12
Construction	73,596	17.5	103,312	21.0	3.5	20
Distribution; hotels & restaurants	65,696	72.6	81,676	66.3	-6.3	-9
Transport & Communications	65,696	9.9	81,676	16.2	6.3	63
Banking, Finance & Insurance	55,091	12.0	93,359	19.0	7.0	59
Public Administration	90,999	123.1	111,026	198.5	75.4	61
Other Services	65,696	14.3	81,676	9.9	-4.4	-31
Defence	65,696	1.2	81,676	0.0	-1.2	-100
Energy	90,999	0.0	111026	1.1	1.1	-
Fish Farming	146,612	1.8	106,659	2.6	0.8	45
Fishing	146,612	1.0	106,659	1.2	0.1	14
Marine Construction	73,596	8.5	103,312	14.1	5.5	65
Recreation & Tourism	35,900	16.8	56,900	24.5	7.7	46
Shipping & Transport	50,800	1.3	96,200	6.8	5.6	438
Total Key Sectors		30.6		50.2	19.6	64
Total all employees		257.5		342.2	84.8	33

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: Turnover data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

The Table shows:

- Increases in turnover in the same groups reporting increase in employment;
- Increases are generally greater than the %-age change in employment due to changes in turnover / employee;
- The key sectors show increases in turnover, with the exception of defence which shows a decrease in turnover; and
- Key sectors rose from 12% of total turnover in 2000 to 15% in 2005.

4.9.7 GVA

Table 4.63 reports GVA data for Dunoon from 2000–2005 by broad industrial group and key sector.

Table 4.63: Dunoon GVA change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	%-age change
Agriculture & Fishing	32,093	0.4	44,562	1.4	1.0	217
Energy & Water	32,093	0.4	44,562	0.6	0.2	64
Manufacturing	37,816	1.6	49,590	2.1	0.5	34
Construction	29,010	6.9	40,761	8.3	1.4	20
Distribution; hotels & restaurants	21,680	24.0	29,747	24.2	0.2	1
Transport & Communications	21,680	3.3	29,747	5.9	2.6	80
Banking, Finance & Insurance	32,963	7.2	38,547	7.8	0.7	9
Public Administration	32,093	43.4	44,562	79.7	36.3	83
Other Services	21,680	4.7	29,747	3.6	-1.1	-24
Defence	21,680	0.4	29,747	0.0	-0.4	-100
Energy	32,093	0.0	44,562	0.4	0.4	-
Fish Farming	58,492	0.7	52,347	1.3	0.6	79
Fishing	58,492	0.4	52,347	0.6	0.2	41
Marine Construction	29,010	3.4	40,761	5.5	2.2	65
Recreation & Tourism	15,200	7.1	18,200	7.8	0.7	10
Shipping & Transport	21,600	0.5	33,900	2.4	1.9	346
Total Key Sectors		12.5		18.1	5.5	44
Total all employees		91.8		133.6	41.7	45

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: GVA data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

The data show that:

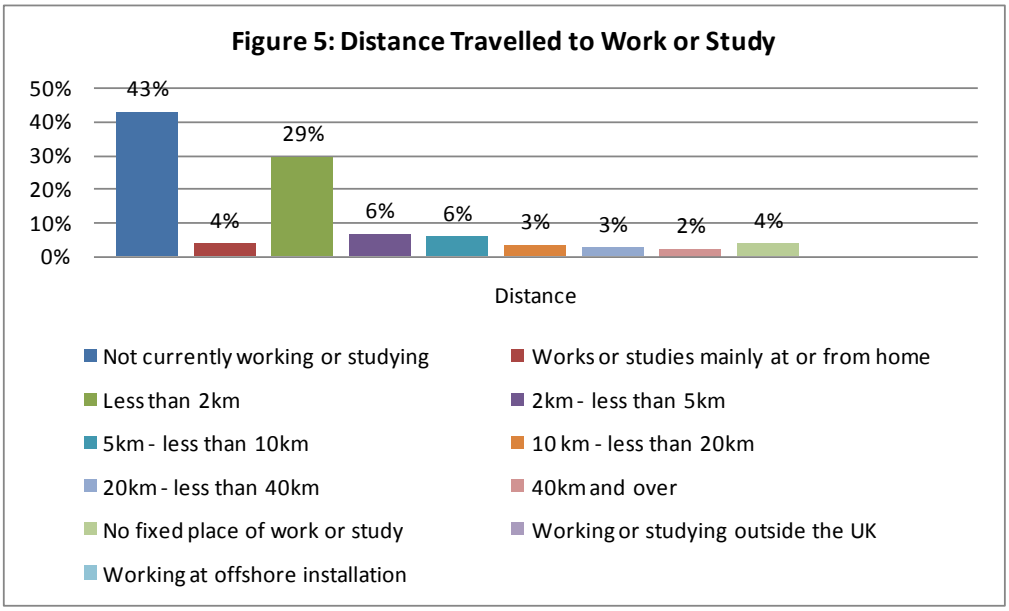
- GVA has increased in the same groups that showed an increase in employment;
- Increases are greater than the %-age changes in employment due to the greater change in GVA/employee;
- The key sectors show increases in GVA, with the exception of defence which shows a decrease in GVA; and
- Key sectors have increased slightly from contributing 13% of Dunoon's GVA in 2000 to contributing 14% in 2005.

4.9.8 Marine / Port Related Activities

Commuting

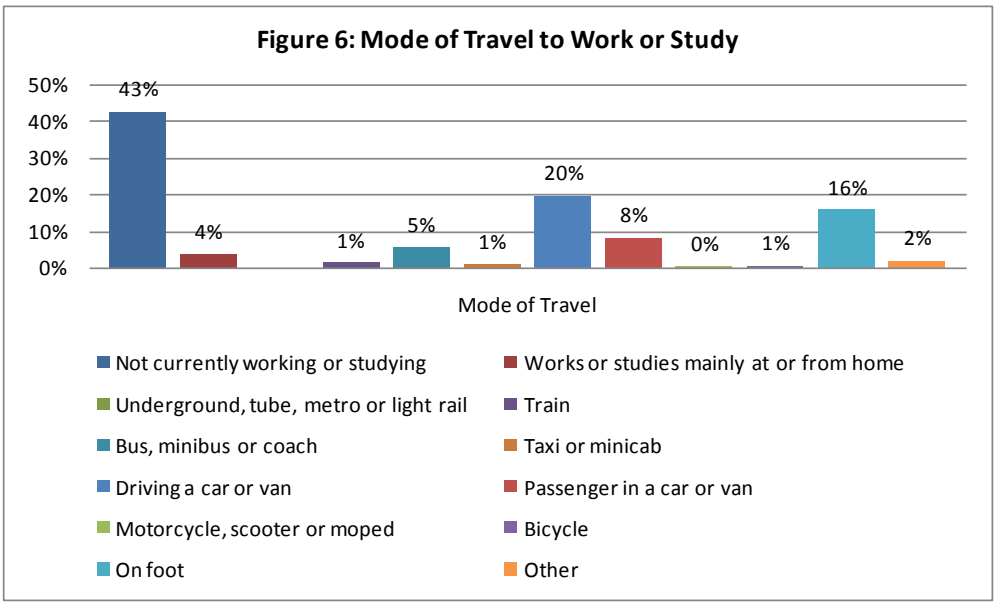
Figures 4&5 show the mode and distance reported by those who normally travelled to a place of work or study on Census Day 2001.

Figure 5: Distance Travelled to Work or Study



Source: 2001 Census

Figure 6: Mode of Travel to Work or Study



Source: 2001 Census

The Figures show that in 2001:

- 43% of the population did not work or study;
- 45% did so within 10km of home;
- 5% travelled more than 20km to work;
- 29% travelled as driver or passenger in a car, taxi or van;
- 16% walked to work.

Fish Landings

There are no recorded fish landings at Dunoon.

Boating & Sailing

Table 4.64 reports the number of berths and moorings available in Dunoon and the Firth of Clyde.

Table 4.64: Available Berths and Moorings

	Current		Proposed	
	Dunoon	Clyde	Dunoon	Clyde
Berths	140	2674	500	5376
Moorings	0	26	0	163
Total	140	2700	500	5539

Source: Clyde Sailing Study

The Table shows that:

- Dunoon (Holy Loch) provides 5% current provision;
- There are plans to increase provision in Dunoon to 12%.

Tourism

Dunoon has no attractions ranked among the Top 20 paid or free attractions in Scotland but it does have one listed among the most visited in the AILLST area:

- Benmore Botanic Garden with 37719 visitors.

Ferry Activity

There are two ferry services between Dunoon and Gourock. Table x reports traffic change on the CalMac service from 2000 – 2005. Table x reports change in traffic on the Western Ferries service.

Table 4.65: Ferry Traffic Gourock – Dunoon 2000 – 2005 (Calmac)

Dunoon	2000	2005	Change	% change
Passengers	621902	627732	2830	0%
Cars	107107	84864	-22243	-21%
Commercial & buses	9638	6033	-3605	-37%
Clyde				
Passengers	3013200	3256000	242800	8%
Cars	567800	636700	68900	12%
Commercial & buses	50400	51200	800	2%

Source: Scottish Government Water Transport Statistics 2006

Table 4.66: Ferry Traffic Gourock – Dunoon 2000 – 2005 (Western)

Dunoon	2000	2005	Change	% change
Passengers	1076600	1280300	203700	19%
Cars	451100	571500	120400	27%
Commercial & buses	11800	35300	23500	199%

Source: Scottish Government Water Transport Statistics 2006

The Tables shows that:

- There has been significant growth in ferry traffic to/from Dunoon;
- CalMac services have seen significant decline except for foot passengers;
- Taken together the data suggest an increase in all traffic. However, the dramatic rise in commercial traffic indicated by the Western Ferries data should be treated with caution and subject to further verification.

4.9.9 Change Over Time and Potential Projects

From 1954 the new car ferry made ten return trips a day to Gourock, some also calling at Kirn. This led to the collapse of the cruising steamer trade in the 1960s, replaced by the two prosaic competing car ferries resulted in the closure of a quarter of Dunoon's hotels From 1972 Western Ferries made its headquarters at Hunter's Quay, and its two second-hand Scandinavian car ferries plied form there to McInroy's Point near Gourock. From 1961-1992 the US submarine base was a mainstay of the town, with a quarter of the population American and much of its commerce dependent on them. When the base closed 800 jobs were lost and 60% of the remaining residents were pensioners. Some new manufacturing employment moved to the town in response to the HIE/CoC Task Force set up. The two competing ferry services still run between Dunoon and Gourock. A marina is now established on the former submarine depot.

Dunoon and National Park Gateway Strategic Development Framework and Action Plan addresses the opportunities that are emerging as result of Dunoon's close proximity and potential gateway status to the National Park. The Local Plan identifies strategic priority as Cowal, focusing on the Sandbank-Dunoon-Toward corridor. There are proposals to increase the available berths at Holy Loch marina by 500.

A subjective view of the changing influence of the marine environment on Dunoon is presented in the graph below.

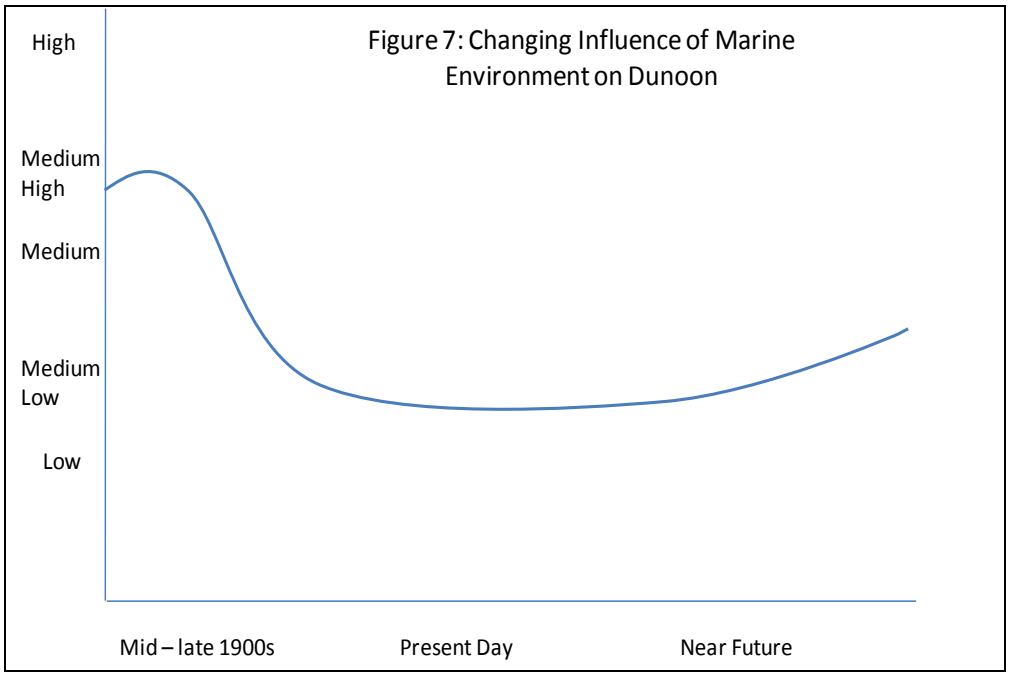


Figure 7: Changing Influence of Marine Environment on Dunoon

The graph charts the decline of the post-war steamer traffic followed by heavy reliance on the USN presence at Holy Loch and the sharp decline when this closed. The town still retained the services of two car ferries through this time and there are plans for significant expansion of the marina at the former naval base.

4.9.10 Conclusions

The main conclusions from this profile are:

- Population decline is counter to the regional and Firth of Clyde trends;
- The population profile has aged significantly;
- Employment growth is below regional trends and is driven by public administration increases;
- Key sectors experienced stronger growth with small absolute gains in most key sectors;

- The business base, including key sectors, declined. This suggests some consolidation of employment in companies;
- Unemployment fell by less than the regional average and absolute change was small;
- Turnover and GVA rose as did the proportion contributed by key sectors;
- Much of the population works locally;
- Dunoon has a number of berths for sailing tourism and current proposals will increase this to 12% of available berths on the Clyde;
- There is a significant amount of ferry traffic to / from Dunoon.

The data analysis for Dunoon is summarised in the SWOT analysis presented below.

STRENGTHS	WEAKNESSES
Good range of amenities Gateway to National Park	Buildings and streetscape in need of upgrading and modernisation
OPPORTUNITIES	**THREATS**
Action Plan envisages considerable investment in Queens Hall, Promenade, and Pier Buildings, as well as other projects – this will significantly increase attractiveness to visitors and residents	Investment does not go ahead

4.10 Girvan

4.10.1 Introduction

Girvan is defined by the following 1991 or 2003 Census Area Statistic (CAS) wards:

- 1991 frozen wards
  - 78UR21: Ailsa;
  - 78UR22: Glendoune.
- 2003 CAS wards
  - 28C29: Girvan Ailsa;
  - 28C30: Girvan Glendoune.

4.10.2 Population

Table 4.67 reports the change in population of Girvan from the 1991 Census to 2001 Census.

Table 4.67: Girvan Population by Age Group

	Children		Working Age (59/64)		Retired		All people
2001							
People	1353	19%	4108	57%	1692	24%	7,153
Males	660	20%	2089	63%	584	18%	3,333
Females	693	18%	2019	53%	1108	29%	3,820
1991 People	1,428	21%	4,360	56%	1,616	23%	7,404

Source: 1991 Census, 2001 Census

The Table shows that:

- The population has decreased by 3%;
- The proportion of children has decreased slightly from 21% to 19%;
- The working age population has increased slightly from 56% to 57%; and
- The retired population has increase slightly from 23% to 24%.

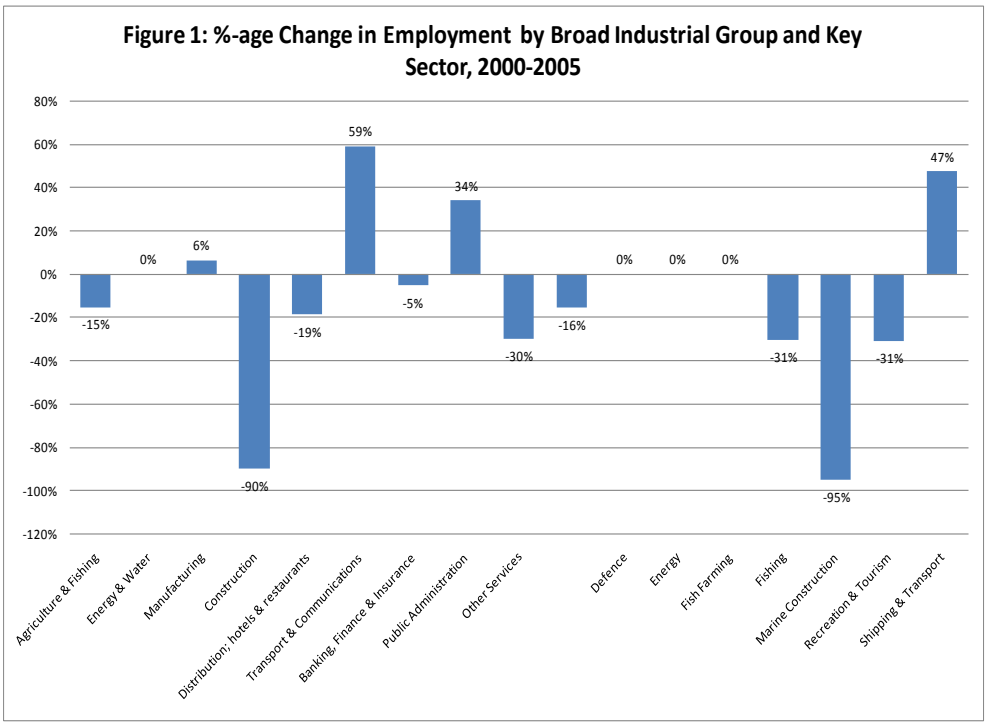
4.10.3 Employment

Table 4.68 reports the change in employment in Girvan from 2000–2005 by broad industrial group and by key sector. Figure 1, over, shows the %-age change in employment over this period.

- Public administration is now the most important employment group in Girvan with 46% of all employees;
- Distribution/hotels is now second with 29%;
- total employment decreased by 16% (310 jobs);
- there was a significant decline in construction and distribution/hotels employment;
- only recreation and tourism of the key sectors is an important employer;
- marine construction suffered a loss of 95% (-412); and
- there was a net loss of 65% (478 jobs) from the key sectors.

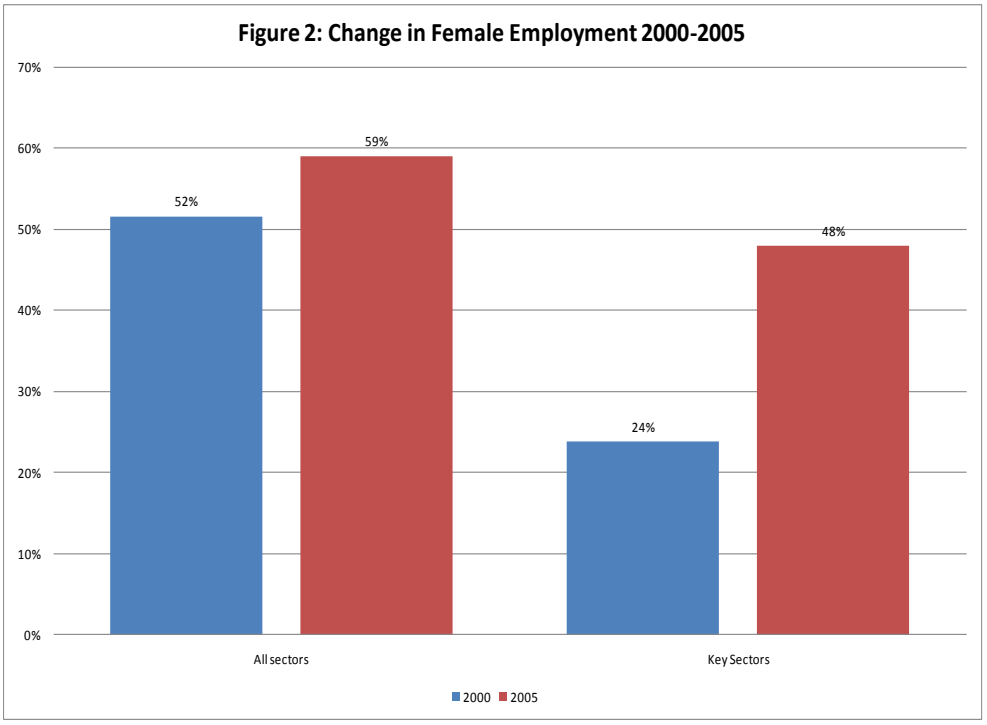
Table 4.68: Girvan Employment change 2000 - 2005

	2000	2005	Change
Agriculture & Fishing	13	11	-2
Energy & Water	0	0	0
Manufacturing	63	67	4
Construction	457	46	-411
Distribution; hotels & restaurants	596	483	-113
Transport & Communications	83	132	49
Banking, Finance & Insurance	111	105	-6
Public Administration	574	768	194
Other Services	83	58	-25
Defence	0	0	0
Energy	0	0	0
Fish Farming	0	0	0
Fishing	13	9	-4
Marine Construction	432	20	-412
Recreation & Tourism	256	176	-80
Shipping & Transport	38	56	18



Source: ABI

Figure 2 reports the change in female employment.



Source: ABI

It shows that:

- females increased their majority of Girvan's employees;
- females have not suffered from overall employment decline as much as males; and
- in key sectors the proportion of females in employment has doubled from 24% to 48%, suggesting most losses fell on male employees.

4.10.4 Workplaces / Business Base

Table 4.69 reports the change in the workplace / business[34] base in Girvan from 2000 – 2005. Figure 3 shows the %-age change in this base.

Table 4.69: Dumbarton Business Base change 2000 - 2005

	2000	2005	Change
Agriculture & Fishing	7	5	-2
Energy & Water	0	0	0
Manufacturing	9	6	-3
Construction	11	9	-2
Distribution; hotels & restaurants	98	91	-7
Transport & Communications	9	13	4
Banking, Finance & Insurance	25	19	-6
Public Administration	22	42	20
Other Services	15	17	2
Defence	0	0	0
Energy	0	0	0
Fish Farming	0	0	0
Fishing	7	5	-2
Marine Construction	2	2	0
Recreation & Tourism	39	33	-6
Shipping & Transport	3	1	-2

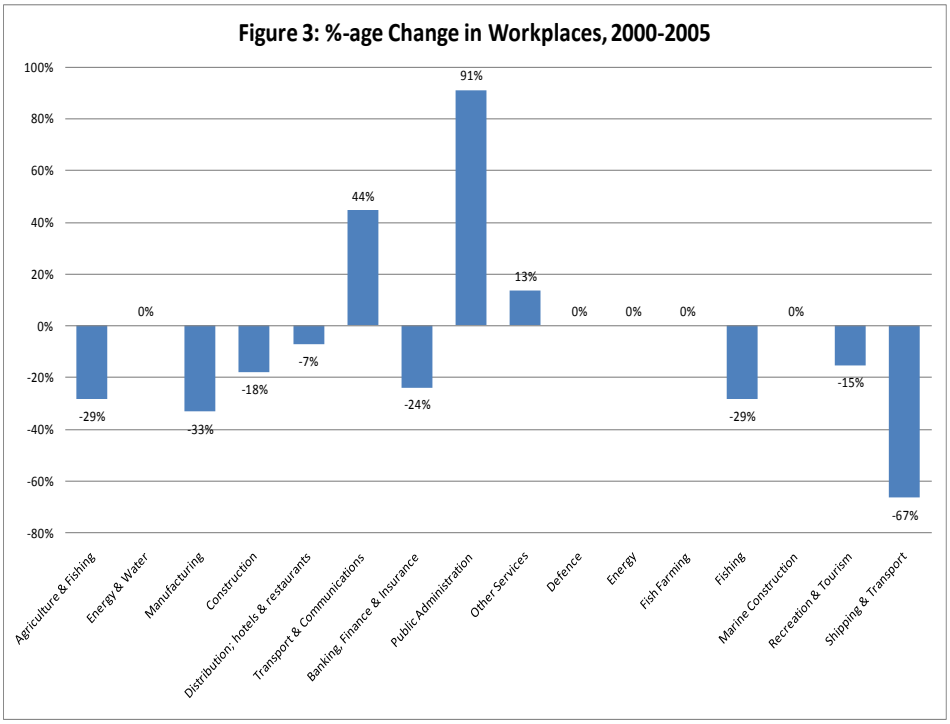
Source: ABI

The Table data show:

- Distribution / hotels is still the largest business grouping (45%);
- Public admin is next with 21%;
- The business base increased by 6 units (3%);
- None of the key sectors recorded any growth;
- Despite the near total decline in employment, marine construction does not show any change in the number of workplaces; and

[34] ABI workplaces are widely accepted as a proxy for the business base.

– Only recreation and tourism is significant of the key sectors, however it experienced a decline of 6 units over the intervening period.



Source: ABI

4.10.5 Unemployment

Table 4.70 reports the absolute change in claimant count in Girvan from September 2004–2007. Figure 4 shows the change in unemployment rates over the same period.

Table 4.70: Absolute Change in Unemployment September 2004 - 2007

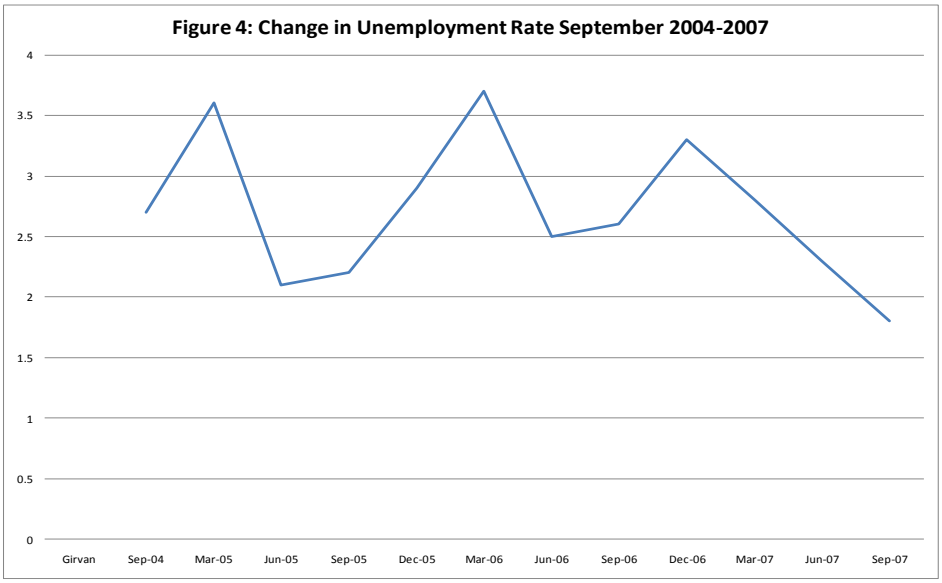
2004	111
2005	92
2006	105
2007	72
Change	-39
% Change	-35%

Source: Claimant Count

The data show that:

– Unemployment has fallen by more than a third in three years;

– The absolute change is relatively small.



Source: Claimant Count

4.10.6 Turnover

Table 4.71 reports turnover change by broad industrial group and key sector in Girvan from 2000–2005.

Table 4.71: Girvan Turnover change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	%-age Change
Agriculture & Fishing	90,999	1.2	111,026	1.2	0.0	3
Energy & Water	90,999	0.0	111,026	0.0	0.0	-
Manufacturing	137,310	8.7	149,693	10.0	1.4	16
Construction	73,596	33.6	103,312	4.8	-28.9	-86
Distribution; hotels & restaurants	65,696	39.2	81,676	39.4	0.3	1
Transport & Communications	65,696	5.5	81,676	10.8	5.3	98
Banking, Finance & Insurance	55,091	6.1	93,359	9.8	3.7	60
Public Administration	90,999	52.2	111,026	85.3	33.0	63
Other Services	65,696	5.5	81,676	4.7	-0.7	-13
Defence	65696	0.0	81676	0.0	0.0	-
Energy	90999	0.0	111026	0.0	0.0	-
Fish Farming	146612	0.0	106659	0.0	0.0	-
Fishing	146612	1.9	106659	1.0	-0.9	-50
Marine Construction	73,596	31.8	103312	2.1	-29.7	-94
Recreation & Tourism	35,900	9.2	56900	10.0	0.8	9
Shipping & Transport	50800	1.9	96200	5.4	3.5	179
Total Key Sectors		44.8		18.4	-26.4	-59
Total all employees		151.9		166.0	14.2	9

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: Turnover data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

The Table shows:

- Increases in turnover in the same groups reporting increase in employment;
- Increases are generally greater than the %-age change in employment due to changes in turnover / employee;
- recreation/tourism and shipping/transport are the only key sectors which show increases in turnover;
- marine construction bears the brunt of the reduction in overall construction and key sector turnover; and

- Key sectors fell from 29% of total turnover in 2000 to 11% in 2005.

4.10.7 GVA

Table 4.72 reports GVA data for Girvan from 2000–2005 by broad industrial group and key sector.

Table 4.72: Girvan GVA change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	%-age change
Agriculture & Fishing	32,093	0.4	44,562	0.5	0.1	17
Energy & Water	32,093	0.0	44,562	0.0	0.0	-
Manufacturing	37,816	2.4	49,590	3.3	0.9	39
Construction	29,010	13.3	40,761	1.9	-11.4	-86
Distribution; hotels & restaurants	21,680	12.9	29,747	14.4	1.4	11
Transport & Communications	21,680	1.8	29,747	3.9	2.1	118
Banking, Finance & Insurance	32,963	3.7	38,547	4.0	0.4	11
Public Administration	32,093	18.4	44,562	34.2	15.8	86
Other Services	21,680	1.8	29,747	1.7	-0.1	-4
Defence	21,680	0.0	29,747	0.0	0.0	-
Energy	32,093	0.0	44,562	0.0	0.0	-
Fish Farming	58,492	0.0	52,347	0.0	0.0	-
Fishing	58,492	0.8	52,347	0.5	-0.3	-38
Marine Construction	29,010	12.5	40,761	0.8	-11.7	-93
Recreation & Tourism	15,200	3.9	18,200	3.2	-0.7	-18
Shipping & Transport	21,600	0.8	33,900	1.9	1.1	131
Total Key Sectors		18.0		6.4	-11.6	-65
Total all employees		54.7		64	9.3	17

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: GVA data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

The data show that:

- GVA has increased in the same groups that showed an increase in employment;
- Increases are greater than the %-age changes in employment due to the greater change in GVA/employee;
- Shipping and transport is the only key sector which shows an increase in GVA;

- marine construction bears the brunt of the reduction in overall construction and key sector turnover; and

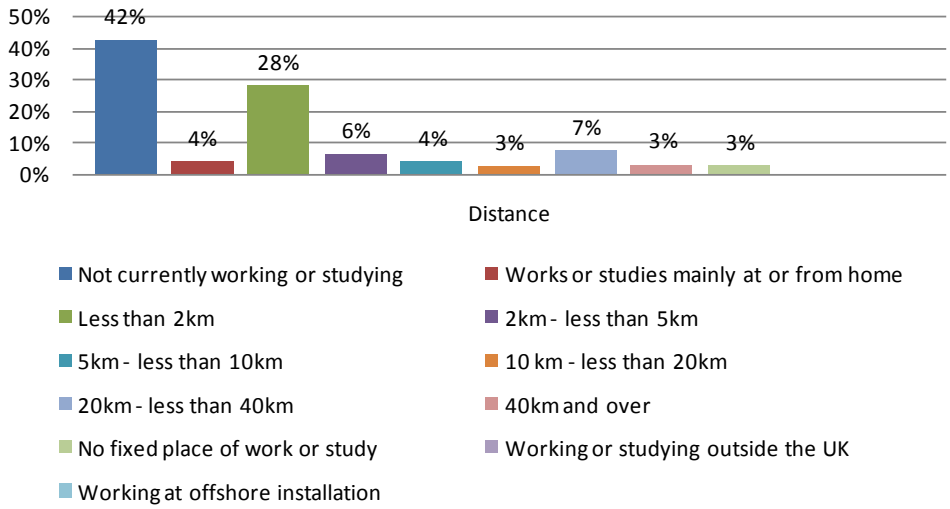
- Key sectors have fallen from contributing 33% of Girvan's GVA in 2000 to contributing 10% in 2005.

4.10.8 Marine / Port Related Activities

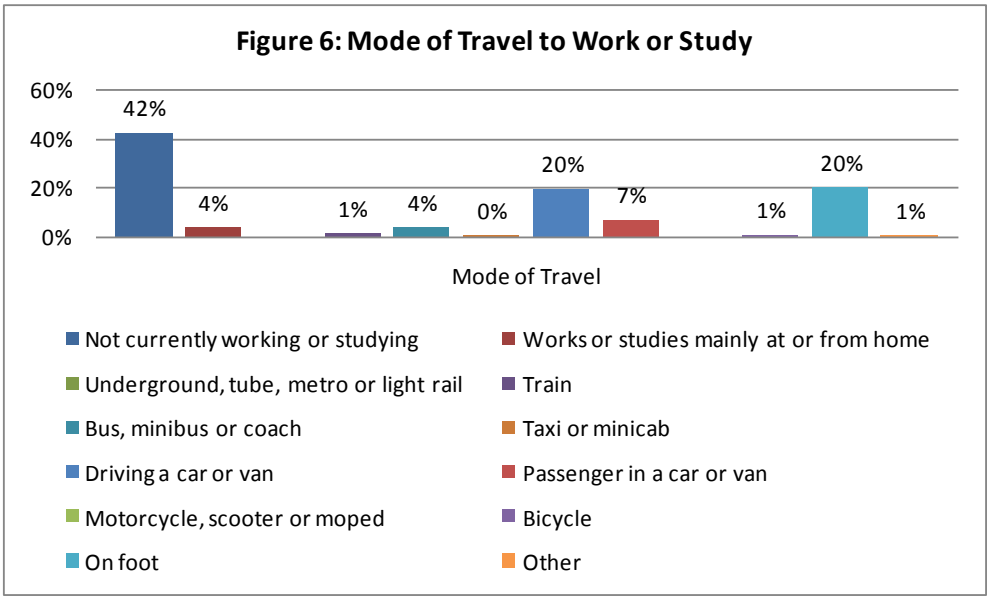
Commuting

Figures 4&5 show the mode and distance reported by those who normally travelled to a place of work or study on Census Day 2001.

Figure 5: Distance Travelled to Work or Study



Source: 2001 Census



Source: 2001 Census

The Figures show that in 2001:

- 42% of the population did not work or study;
- 42% did so within 10km of home;
- 10% travelled more than 20km to work;
- 27% travelled as driver or passenger in a car or van.

Fish Landings

Table 4.73 reports fish landings by volume and value for 2000 and 2006.

Table 4.73: Fish landings at Girvan by Volume and Value 2000 - 06

	Volume (tonnage)	Value (£)
2000	604.5	684,433
2006	641.5	1,108,576
Change	37	424,143

Source: Scottish Fisheries Statistics 2006.
Note: Landings are not necessarily made by vessels at their home port or harbour.

The data shows that:

- Live weight tonnage landed grew by 6%; but
- The value of fish landings grew by 62%

Boating & Sailing

Table 4.74 reports the number of berths and moorings available in Girvan and the Firth of Clyde.

Table 4.74: Available Berths and Moorings

	Current		Proposed	
	Girvan	Clyde	Girvan	Clyde
Berths	30	2674	70	5376
Moorings	0	26	0	163
Total	0	2700	70	5539

Source: Clyde Sailing Study

It shows that:

- Girvan currently has limited official facilities for touring boats;
- Significant development of this kind is planned.

Tourism

Girvan has no visitor attractions ranked in the Top 20 most visited free and paid attraction in Scotland. Nor does it have any attraction listed as among the most visited in Ayrshire.

Ferry Activity

There are no major ferry services to / from Girvan.

4.10.9 Change Over Time and Potential Projects

Girvan has not changed much over the past 50 years and in 1987 Girvan was still a small but busy fishing port, with Nobles' slipway for repairing fishing vessels. Its day-trip/resort role has outlasted several other along the coast and Girvan still boast many small hotels, guest houses and a caravan park. Wm Grant's built a major distillery on 1963 and expanded operations in the 1990s. A plant processing seaweed for food and textile manufacture also arrived in the 1960s and was taken over in 1995 by Monsanto in 1995.

The JSP identifies potential for redevelopment of Girvan harbour. The Clyde Sailing Study records proposals for 100 new berths in Girvan Harbour.

A subjective view of the changing influence of the marine environment on Girvan is presented in the graph below.

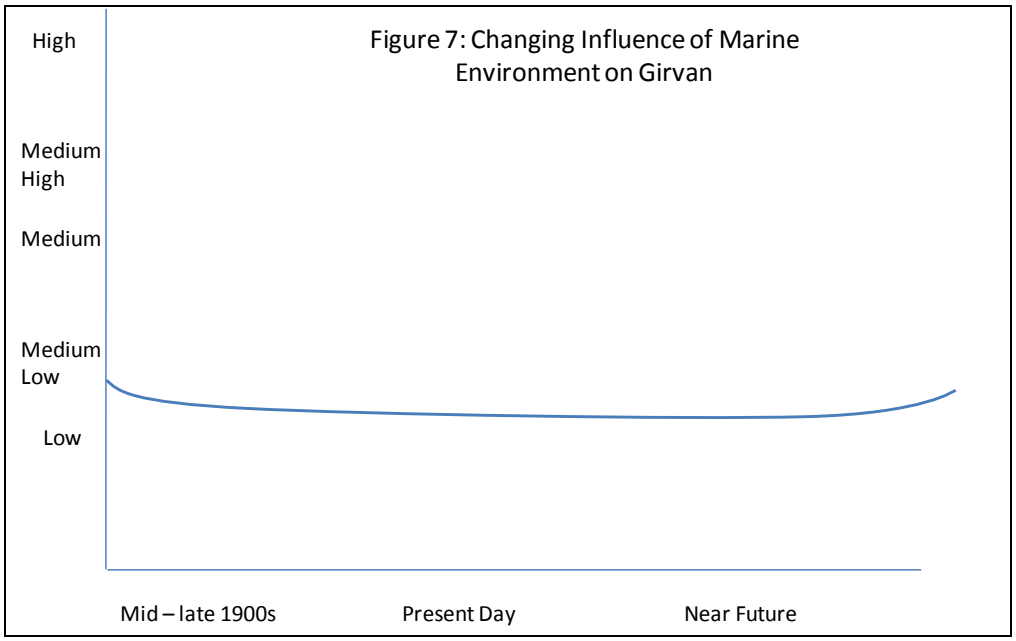


Figure 7: Changing Influence of Marine Environment on Girvan

The graph charts the limited but relatively constant influence of the marine environment on Girvan. Slight decline in tourism and fishing is potentially offset by proposed redevelopment of the harbour.

4.10.10 Conclusions

The main conclusions from this profile are:

- Population decline is slightly more than regional trends and is counter to the change in the outer firth wards;
- The population profile is ageing – fewer children and more old people;

- Employment decline is against regional trends;
- A fall of 90% in construction employment is the major factor behind overall and key sector employment change;
- The business base declined across most sectors with only public administration recording strong growth;
- Unemployment fell by more than the average;
- The dramatic decline of marine construction meant key sector turnover fell substantially. However, total turnover and GVA show some small growth due to the increases in output per employee;
- More than 40% of the population work locally;
- The value of fish landings grew much more substantially than the simple tonnage and is now worth more than £1m;
- There is no significant boating sailing or shipping activity in Girvan.

The data analysis for Girvan is summarised in the SWOT analysis presented below.

STRENGTHS	WEAKNESSES
Harbour and setting out point for Ailsa Craig	Low qualified workforce Depressed housing market Reliance on public sector employment Retail offering Lack of visitor accommodation
OPPORTUNITIES	THREATS
Development of Ailsa Craig Centre and yachting	Poorly qualified/skilled residents barrier to development Suffers under-investment

4.11 Gourock

4.11.1 Introduction

Gourock is defined by the following 1991 or 2003 Census Area Statistic (CAS) wards:

- 1991 frozen wards
  - 78UP18: Cardwell Bay;
  - 78UP19: Gourock.
- 2003 CAS wards
  - 19C17: Ward 17;
  - 19C18: Ward 18.

4.11.2 Population

Table 4.75 reports the change in population of Gourock from the 1991 Census to 2001 Census.

Table 4.75: Gourock Population by Age Group

	Children		Working Age (59/64)		Retired		All people
2001							
People	1371	17%	4839	58%	2067	25%	8,277
Males	724	18%	2522	64%	714	18%	3,960
Females	647	15%	2317	54%	1353	31%	4,317
1991 People	1879	17%	6521	60%	2463	23%	10,863

Source: 1991 Census, 2001 Census

The Table shows that:

- The population has decreased by 24%;
- The proportion of children is unchanged;
- The working age population has decreased slightly from 60% to 58%; and
- The retired population has increased slightly from 23% to 25%.

4.11.3 Employment

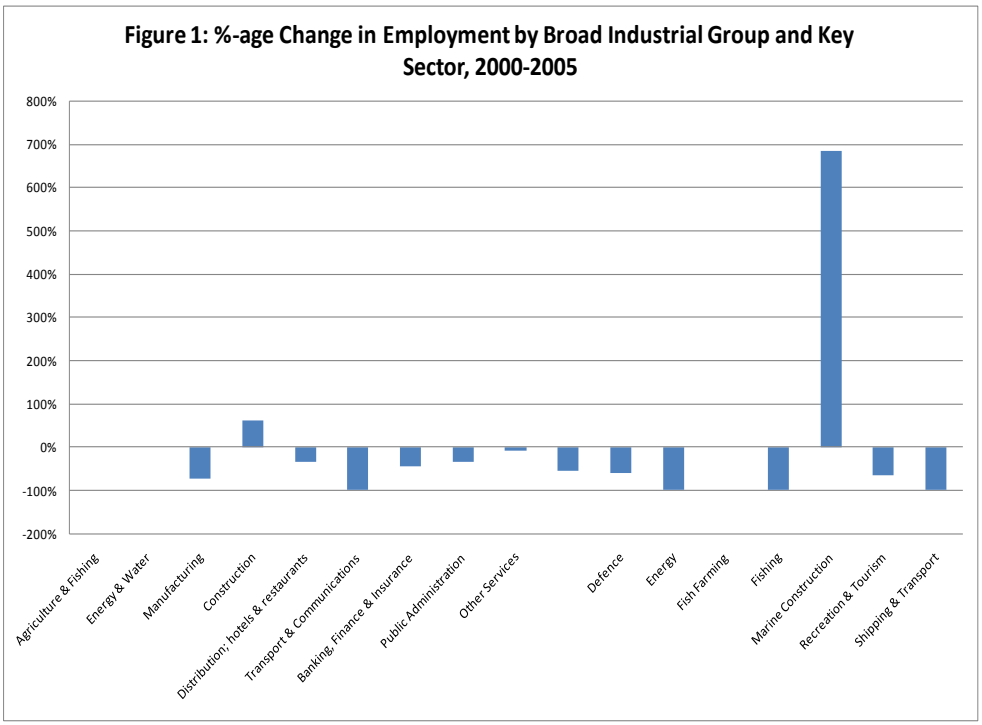
Table 4.76 reports the change in employment in Gourock from 2000–2005 by broad industrial group and by key sector. Figure 1, over, shows the %-age change in employment over this period.

- Public administration remains the most important employment group in Gourock with 53% of all employees;
- Distribution/hotels is next with 27%;
- total employment decreased by 55% (1371 jobs);
- there was a significant decline in transport and communications, and public administration employment amongst others;
- the near total decline in transport & communications employment (of which shipping & transportation is a part) suggests a major closure or relocation from the Gourock area or that the change is a function of the different geographies used to define the settlement;
- only recreation and tourism of the key sectors is an important employer, however there was a loss of 174 jobs over the period. Shipping and transportation was all but wiped out; and
- there was a net loss of 68% (388 jobs) from the key sectors.

Table 4.76: Gourock Employment change 2000 - 2005

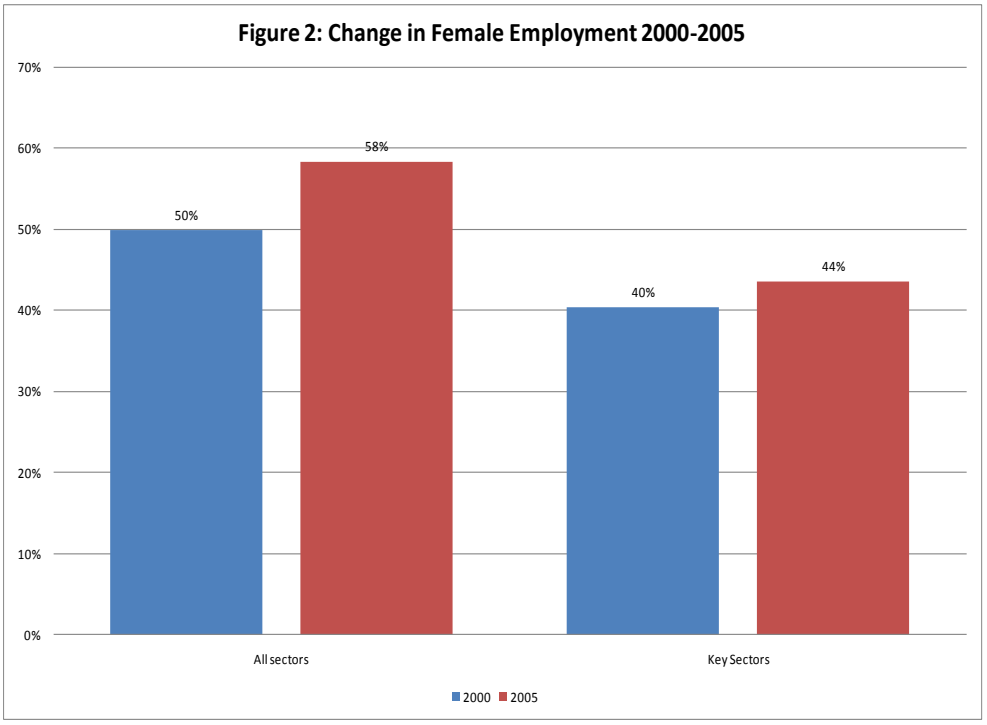
	2000	2005	Change
Agriculture & Fishing	0	0	0
Energy & Water	0	2	2
Manufacturing	53	14	-39
Construction	39	63	24
Distribution; hotels & restaurants	484	311	-173
Transport & Communications	813	1	-812
Banking, Finance & Insurance	89	48	-41
Public Administration	927	604	-323
Other Services	104	95	-9
Defence	121	47	-74
Energy	7	0	-7
Fish Farming	0	0	0
Fishing	5	0	-5
Marine Construction	6	47	41
Recreation & Tourism	264	90	-174
Shipping & Transport	171	2	-169

Source: ABI



Source: ABI

Figure 2 reports the change in female employment.



Source: ABI

It shows that:

- females now make up a majority of Gourock's employees;
- Females have not suffered from overall employment decline as much as males; and
- in key sectors the proportion of females in employment has increased by 4%.

4.11.4 Workplaces / Business Base

Table 4.77 reports the change in the workplace / business[35] base in Gourock from 2000 – 2005. Figure 3 shows the %-age change in this base.

Table 4.77: Gourock Business Base change 2000 - 2005

	2000	2005	Change
Agriculture & Fishing	0	0	0
Energy & Water	0	1	1
Manufacturing	10	6	-4
Construction	13	10	-3
Distribution; hotels & restaurants	78	38	-40
Transport & Communications	9	1	-8
Banking, Finance & Insurance	30	34	4
Public Administration	32	20	-12
Other Services	30	22	-8
Defence	4	1	-3
Energy	1	0	-1
Fish Farming	0	0	0
Fishing	1	0	-1
Marine Construction	3	3	0
Recreation & Tourism	35	13	-22
Shipping & Transport	4	1	-3

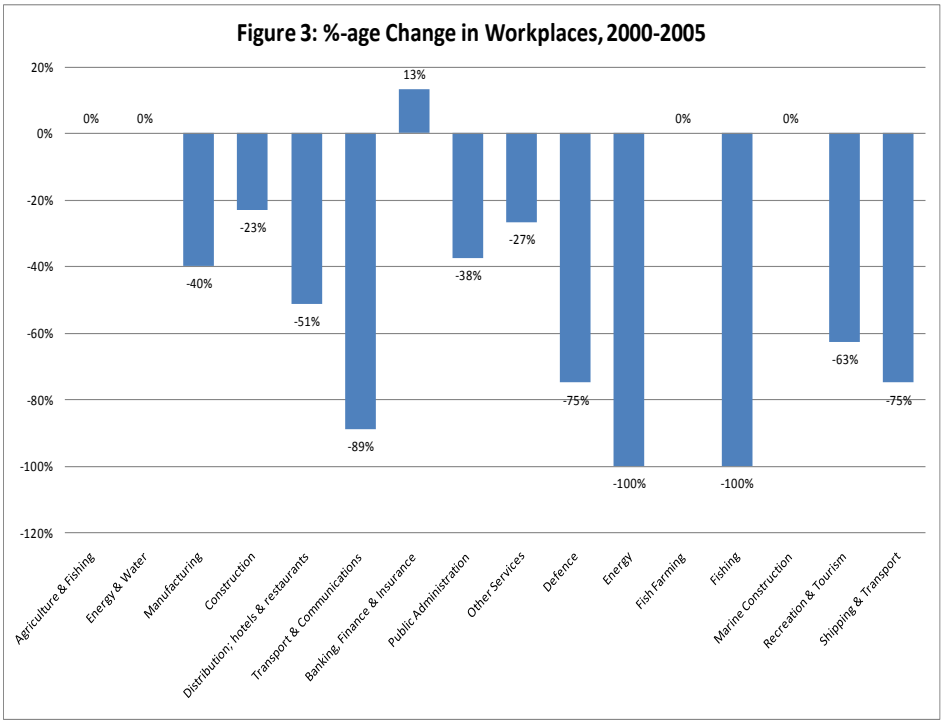
Source: ABI

The Table data show:

- Distribution / hotels is still the largest business grouping (29%);
- Banking/finance is next with 26%;
- The business base decreased by 70 units (35%);
- Only banking/finance and energy/water recorded any growth;
- Big losses are in those sectors showing a big fall in employment; and

[35] ABI workplaces are widely accepted as a proxy for the business base.

- Only recreation and tourism is significant of the key sectors, however it suffered a decline of 22 units over the intervening period.



Source: ABI

4.11.5 Unemployment

Table 4.78 reports the absolute change in claimant count in Gourock from September 2004–2007. Figure 4 shows the change in unemployment rates over the same period.

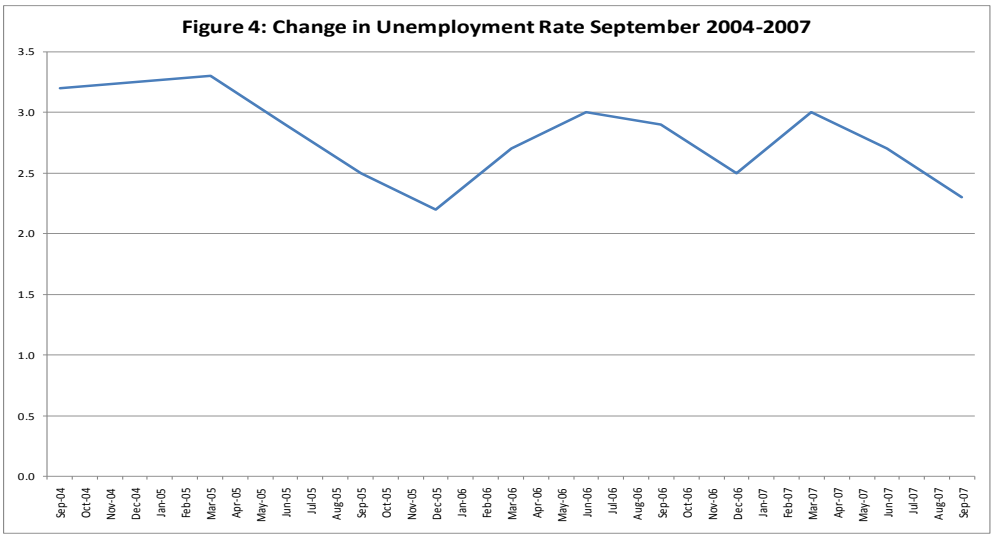
Table 4.78: Absolute Change in Unemployment September 2004 - 2007

2004	153
2005	122
2006	142
2007	112
Change	-41
% Change	-27%

Source: Claimant Count

The data show that:

- Unemployment has fallen by more than a quarter in three years;



Source: Claimant Count

4.11.6 Turnover

Table 4.79 reports turnover change by broad industrial group and key sector in Gourock from 2000–2005.

Table 4.79: Gourock Turnover change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	%-age Change
Agriculture & Fishing	90,999	0.0	111,026	0.0	0.0	-
Energy & Water	90,999	0.0	111,026	0.2	0.2	-
Manufacturing	137,310	7.3	149,693	2.1	-5.2	-71
Construction	73,596	2.9	103,312	6.5	3.6	127
Distribution; hotels & restaurants	65,696	31.8	81,676	25.4	-6.4	-20
Transport & Communications	65,696	53.4	81,676	0.1	-53.3	-100
Banking, Finance & Insurance	55,091	4.9	93,359	4.5	-0.4	-9
Public Administration	90,999	84.4	111,026	67.1	-17.3	-21
Other Services	65,696	6.8	81,676	7.8	0.9	14
Defence	65696	7.9	81676	3.8	-4.1	-52
Energy	90999	0.6	111026	0.0	-0.6	-100
Fish Farming	146612	0.0	106659	0.0	0.0	-
Fishing	146612	0.7	106659	0.0	-0.7	-100
Marine Construction	73,596	0.4	103312	4.9	4.4	1000
Recreation & Tourism	35,900	9.5	56900	5.1	-4.4	-46
Shipping & Transport	50800	8.7	96200	0.2	-8.5	-98
Total Key Sectors		27.9		14.0	-13.9	-50
Total all employees		191.4		113.6	-77.8	-41

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04

Note: Turnover data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved

The Table shows:

- Increases in turnover in the same groups reporting increase in employment;
- Increases are generally greater than the %-age change in employment due to changes in turnover / employee. However, the extent of employment losses are such that increased output from remaining employees cannot maintain turnover levels;
- Transport & communications is all but eliminated as a contributing group;

- Marine construction is the only key sector which shows an increase in turnover;
- Shipping & transportation is the main loser; and
- Key sectors fell from 15% of total turnover in 2000 to 12% in 2005 due to the big losses incurred by recreation and shipping.

4.11.7 GVA

Table 4.80 reports GVA data for Gourock from 2000–2005 by broad industrial group and key sector.

Table 4.80: Gourock GVA change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	%-age change
Agriculture & Fishing	32,093	0.0	44,562	0.0	0.0	-
Energy & Water	32,093	0.0	44,562	0.1	0.1	-
Manufacturing	37,816	2.0	49,590	0.7	-1.3	-65
Construction	29,010	1.1	40,761	2.6	1.4	127
Distribution; hotels & restaurants	21,680	10.5	29,747	9.3	-1.2	-12
Transport & Communications	21,680	17.6	29,747	0.0	-17.6	-100
Banking, Finance & Insurance	32,963	2.9	38,547	1.9	-1.1	-37
Public Administration	32,093	29.8	44,562	26.9	-2.8	-10
Other Services	21,680	2.3	29,747	2.8	0.6	25
Defence	21,680	2.6	29,747	1.4	-1.2	-47
Energy	32,093	0.2	44,562	0.0	-0.2	-100
Fish Farming	58,492	0.0	52,347	0.0	0.0	-
Fishing	58,492	0.3	52,347	0.0	-0.3	-100
Marine Construction	29,010	0.2	40,761	1.9	1.7	1001
Recreation & Tourism	15,200	4.0	18,200	1.6	-2.4	-59
Shipping & Transport	21,600	3.7	33,900	0.1	-3.6	-98
Total Key Sectors		11.0		5.0	-6.0	-54
Total all employees		66.2		44.2	-22.0	-33

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: GVA data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

The data show that:

- GVA has increased in the same groups that showed an increase in employment, with the exception of energy and water;

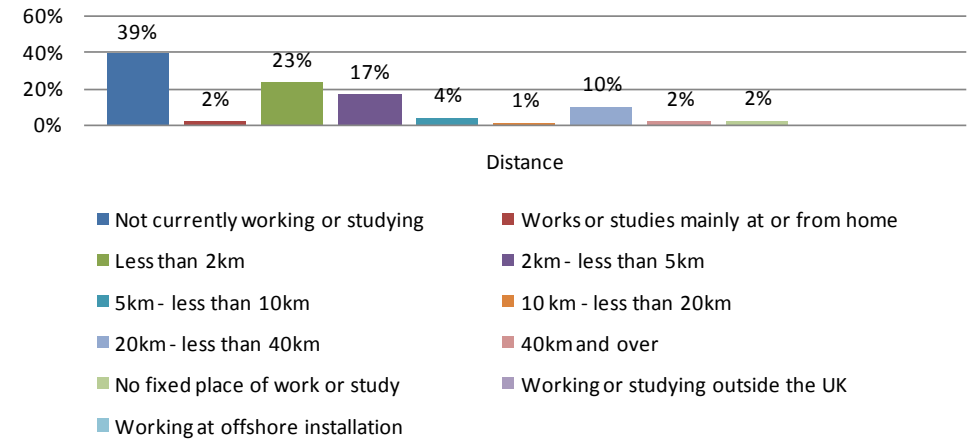
- Increases are greater than the %-age changes in employment due to the greater change in GVA/employee. As for turnover employment losses are such that improved productivity cannot maintain levels of GVA;
- Transport & communications is the group with the biggest change;
- Marine construction is the only key sector which shows an increase in GVA;
- Shipping & transportation is responsible for most of the loss; and
- Key sectors have fallen slightly from contributing 16% of Gourock's GVA in 2000 to contributing 11% in 2005.

4.11.8 Marine / Port Related Activities

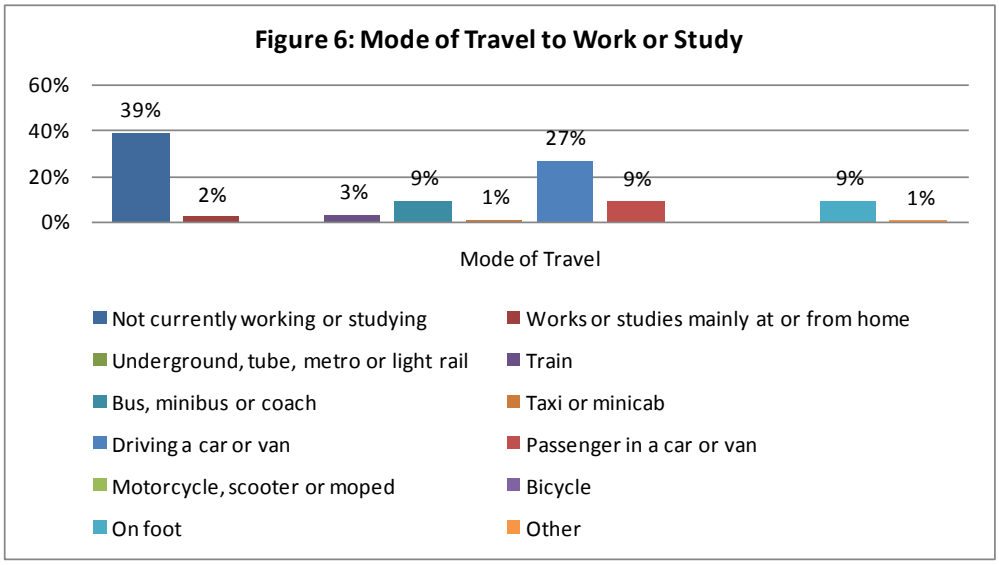
Commuting

Figures 4&5 show the mode and distance reported by those who normally travelled to a place of work or study on Census Day 2001.

Figure 5: Distance Travelled to Work or Study



Source; 2001 Census



Source: 2001 Census

The Figure show that in 2001:

- 39% of the population did not work or study;
- 46% did so within 10km of home;
- 12% travelled more than 20km to work;

Fish Landings

There are no recorded fish landings at Gourock.

Boating & Sailing

There is no current provision for boating or sailing in Gourock and none is planned.

Tourism

Gourock has no attractions ranked among the Top 20 paid or free attractions in Scotland in 2005 and none ranked among the most visited attraction sin Greater Glasgow and Clyde valley area.

Ferry Activity

There are two ferry services between Dunoon and Gourock. Table 4.81 reports traffic change on the CalMac service from 2000 – 2005. Table 4.82 reports change in traffic on the Western Ferries service.

Table 4.81: Ferry Traffic Gourock – Dunoon 2000 – 2005 (Calmac)

Dunoon	2000	2005	Change	% change
Passengers	621902	627732	2830	0%
Cars	107107	84864	-22243	-21%
Commercial & buses	9638	6033	-3605	-37%
Clyde				
Passengers	3013200	3256000	242800	8%
Cars	567800	636700	68900	12%
Commercial & buses	50400	51200	800	2%

Source: Scottish Government Water Transport Statistics 2006

Table 4.82: Ferry Traffic Gourock – Dunoon 2000 – 2005 (Western)

Dunoon	2000	2005	Change	% change
Passengers	1076600	1280300	203700	19%
Cars	451100	571500	120400	27%
Commercial & buses	11800	35300	23500	199%

Source: Scottish Government Water Transport Statistics 2006

The Tables shows that:

- There has been significant growth in ferry traffic to/from Dunoon;
- CalMac services have seen significant decline except for foot passengers;

Taken together the data suggest an increase in all traffic. However, the dramatic rise in commercial traffic indicated by the Western Ferries data should be treated with caution and subject to further verification.

4.11.9 Change Over Time and Potential Projects

In the past Gourock functioned as a seaside resort on the Firth of Clyde. In 1970 Gourock Pier became the base for the elderly 80m-long triple-screw turbine steamer Queen Mary. She plied until 1977, but survived to become a Thames restaurant in 1988. By 1971 a passenger ferry plied to Kilcreggan. From 1972 two second-hand Scandinavian car ferries plied from McInroy's Point, 2km west of Gourock, to Hunter's Quay by Dunoon, this still runs today. Ferries still ply to Dunoon from Gourock and in summer also to Helensburgh. Today Gourock's principal function is as a popular residential area.

Gourock is part of Riverside Inverclyde – a residential, commercial and leisure regeneration programme worth £94m over ten years.

A subjective view of the changing influence of the marine environment on Gourock is presented in the graph below.

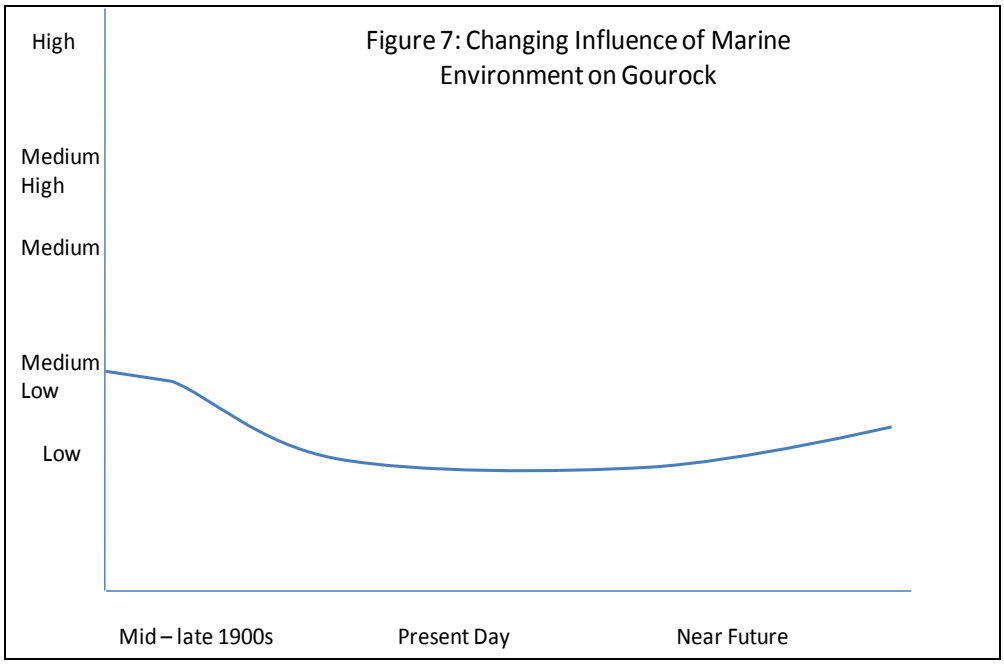


Figure 7: Changing Influence of Marine Environment on Gourock

The graph charts the decline of steamer traffic and its replacement by the car ferry services to Dunoon. Riverfront regeneration gives cause for some future optimism.

4.11.10 Conclusions

The main conclusions from this profile are:

- Population decline is significantly counter to regional and Firth of Clyde trends. It is also diametrically opposite to trend in the outer firth wards;
- The population profile is ageing – fewer children and more retired people;
- Employment decline is significantly counter to regional trends. It is largely influenced by dramatic decline in Transport and Communications but it is not clear whether this is a function of the changes in ward boundaries or represents a major closure or relocation;
- The business base also shows significant decline over most groups and sectors;
- Unemployment does decline more than the regional averages but the absolute number is small;
- Turnover and GVA overall and in key sectors falls, despite increases in productivity and output per employee, due to the major job losses;

- Almost half the resident population work locally within 10km but over 10% travel more than 20km;
- There is no significant boating/sailing or tourist activity associated with Gourock;
- Gourock is an important Clyde ferry port moving a significant quantity of people and produce to and from Dunoon and Argyll.

The data analysis for Gourock is summarised in the SWOT analysis presented below.

STRENGTHS	WEAKNESSES
River Clyde (regeneration focus)	Current housing offer
Natural environment	Few tourist attractions (no iconic Visitor attraction)
Range of activities already in place	Town centre offering (with no access to waterfront)
Priority of partners	Narrow employment base, heavily dependent on public sector
Access to Glasgow	
OPPORTUNITIES	**THREATS**
Redevelopment of waterfront – housing, commercial, leisure	Waterfront not completed
Marine based activities	Demographics = declining population, reduced workforce
Connecting town centre with waterfront	Ongoing social deprivation
Rise in property prices in Glasgow	

4.12 Greenock

4.12.1 Introduction

Greenock is defined by the following 1991 or 2003 Census Area Statistic (CAS) wards:

- 1991 frozen wards
  - 78UP08: Bellville;
  - 78UP07: Blairmore;
  - 78UP12: Bow;
  - 78UP10: Broomhill;
  - 78UP11: Gateside;
  - 78UP06: Gibshill;
  - 78UP09: Greenock East Central;
  - 78UP15: Greenock South;
  - 78UP16: Greenock West Central;
  - 78UP17: Greenock West End;
  - 78UP13: Larkfield.

- 2003 CAS wards
  - 19C10: Ward 10;
  - 19C11: Ward 11;
  - 19C12: Ward 12;
  - 19C16: Ward 16;
  - 19C06: Ward 6;
  - 19C07: Ward 7;
  - 19C08: Ward 8;
  - 19C09: Ward 9.

4.12.2 Population

Table 4.83 reports the change in population of Greenock from the 1991 Census to 2001 Census.

Table 4.83: Greenock Population by Age Group

	Children		Working Age (59/64)		Retired		All people
2001							
People	5834	18%	19,195	60%	7010	22%	32,039
Males	2989	20%	9823	65%	2292	15%	15,104
Females	2845	17%	9372	55%	4718	28%	16,935
1991 People	8,698	20%	26,157	60%	9,067	21%	43,922

Source: 1991 Census, 2001 Census

The Table shows that:

- The population has decreased by 27%;
- The proportion of children has decreased from 20% to 18%;
- The working age population is unchanged; and
- The retired population has increased slightly from 21% to 22%.

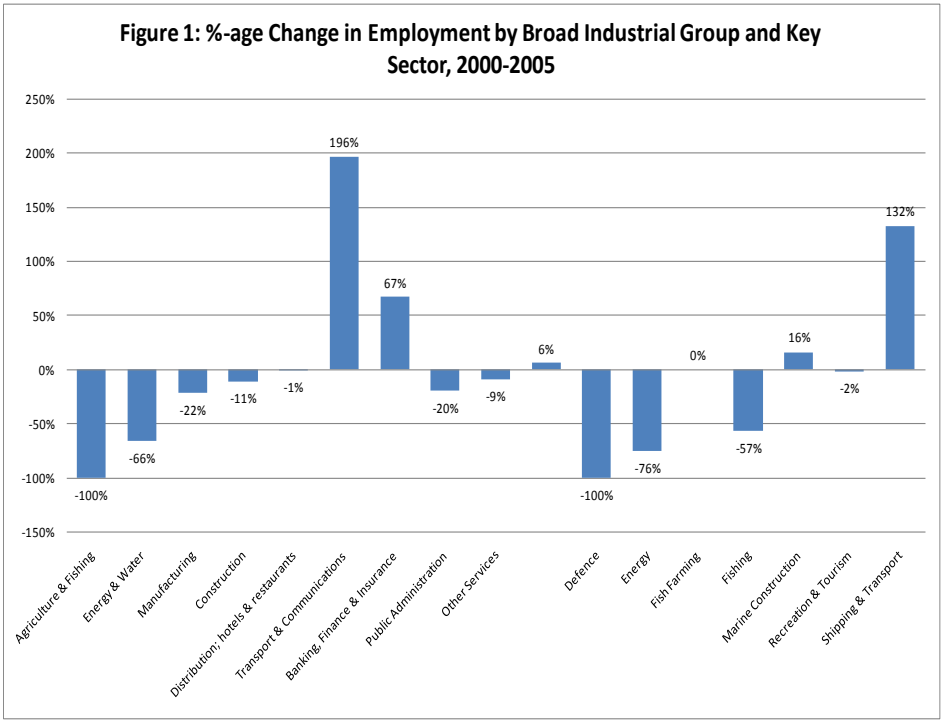
4.12.3 Employment

Table 4.84 reports the change in employment in Greenock from 2000–2005 by broad industrial group and by key sector. Figure 1, over, shows the %-age change in employment over this period.

Table 4.84: Greenock Employment change 2000 - 2005

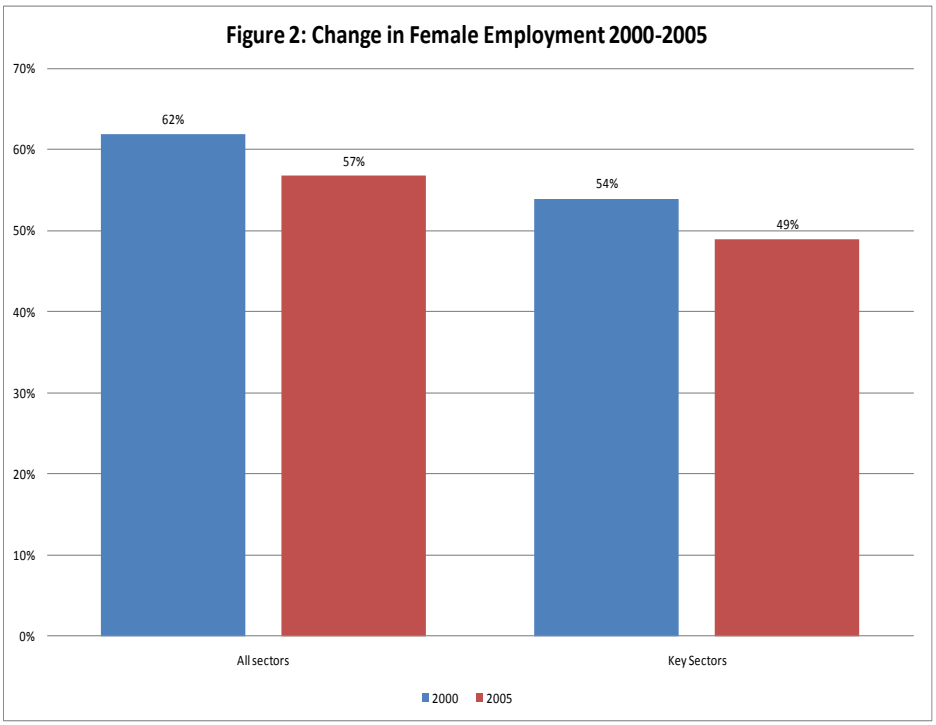
	2000	2005	Change
Agriculture & Fishing	1	0	-1
Energy & Water	86	29	-57
Manufacturing	1,020	800	-220
Construction	441	392	-49
Distribution; hotels & restaurants	4,352	4,317	-35
Transport & Communications	742	2,197	1,455
Banking, Finance & Insurance	2,194	3,654	1,460
Public Administration	7,553	6,072	-1,481
Other Services	975	888	-87
Defence	6	0	-6
Energy	37	9	-28
Fish Farming	0	0	0
Fishing	7	3	-4
Marine Construction	158	183	25
Recreation & Tourism	1,615	1,587	-28
Shipping & Transport	157	365	208

- Public administration remains the most important employment group in Greenock with 33% of all employees despite a fall in numbers;
- Distribution/hotels is next with 24%;
- total employment rose by 6% (985 jobs);
- there was a significant decline in public administration (-20%) and manufacturing employment (-22%);
- only recreation and tourism of the key sectors is an important employer; and
- there was a net increase of 8% (167 jobs) from the key sectors;
- this was mainly due to strong growth in shipping and transport.



Source: ABI

Figure 2 reports the change in female employment.



Source: ABI

It shows that:

- females now make up a smaller proportion of Greenock's employees;
- females have not benefitted from overall employment growth as much as males; and
- in key sectors the proportion of females in employment has decreased by 5%.

4.12.4 Workplaces / Business Base

Table 4.85 reports the change in the workplace / business[36] base in Greenock from 2000 – 2005. Figure 3 shows the %-age change in this base.

Table 4.85: Greenock Business Base change 2000 - 2005

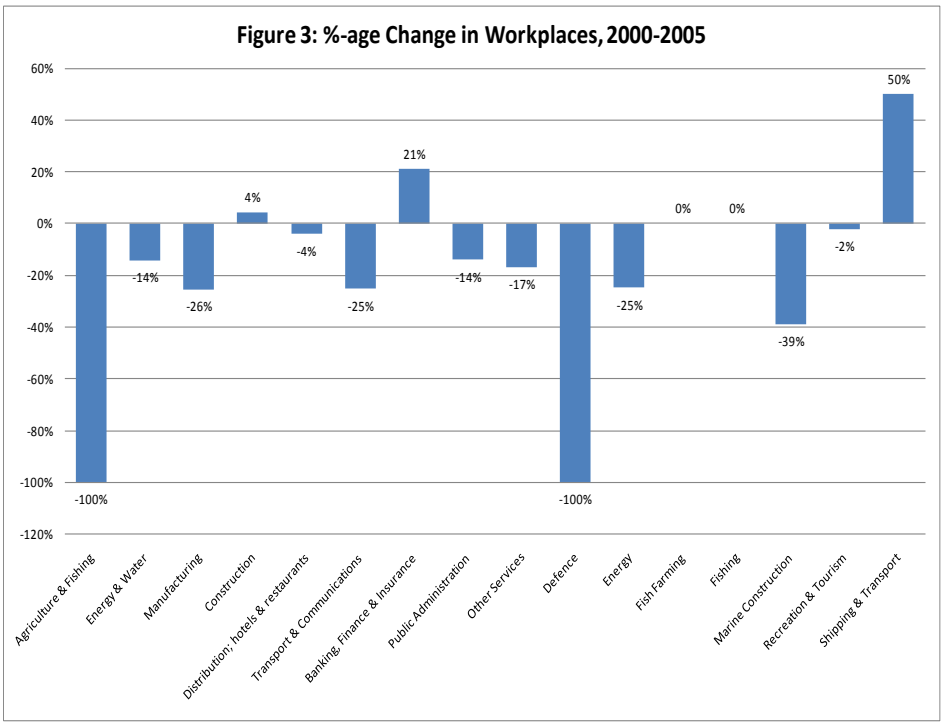
	2000	2005	Change
Agriculture & Fishing	1	0	-1
Energy & Water	7	6	-1
Manufacturing	43	32	-11
Construction	46	48	2
Distribution; hotels & restaurants	404	387	-17
Transport & Communications	55	41	-14
Banking, Finance & Insurance	186	225	39
Public Administration	198	170	-28
Other Services	111	92	-19
Defence	1	0	-1
Energy	4	3	-1
Fish Farming	0	0	0
Fishing	1	1	0
Marine Construction	18	11	-7
Recreation & Tourism	128	125	-3
Shipping & Transport	8	12	4

Source: ABI

The Table data show:

- Distribution / hotels is still the largest business grouping (39%);
- Banking/finance is next with 22%;
- The business base decreased by 50 units (5%);
- Only banking and finance recorded any significant growth;
- Only recreation and tourism is significant of the key sectors, however it experienced a decline of 3 units over the intervening period.

[36] ABI workplaces are widely accepted as a proxy for the business base.



Source: ABI

4.12.5 Unemployment

Table 4.86 reports the absolute change in claimant count in Greenock from September 2004–2007. Figure 4 shows the change in unemployment rates over the same period.

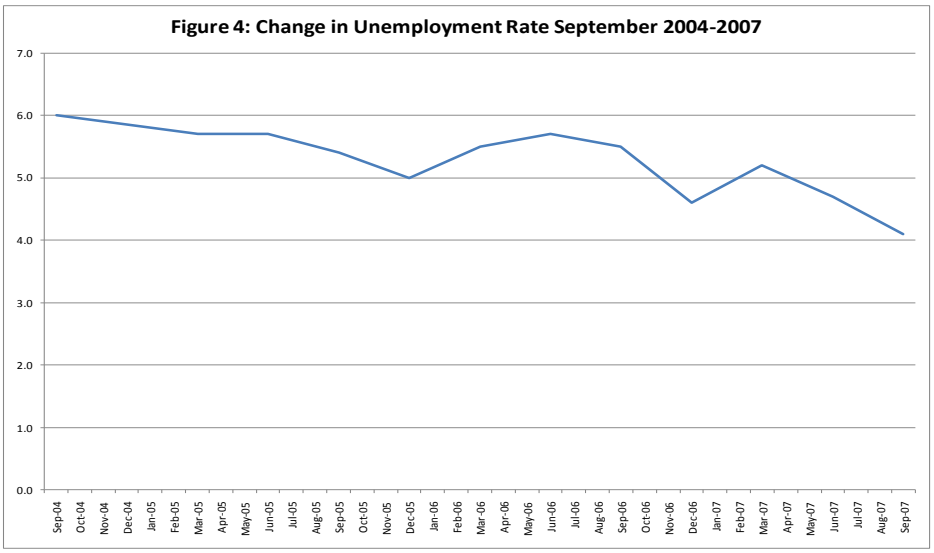
Table 4.86: Absolute Change in Unemployment September 2004 - 2007

2004	1,150
2005	1,034
2006	1,058
2007	792
Change	-358
% Change	-31%

Source: Claimant Count

The data show that:

- Unemployment has fallen by nearly a third in three years;
- The absolute change is large.



Source: Claimant Count

4.12.6 Turnover

Table 4.87 reports turnover change by broad industrial group and key sector in Greenock from 2000–2005.

Table 4.87: Greenock Turnover change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	%-age Change
Agriculture & Fishing	90,999	0.1	111,026	0.0	-0.1	-100
Energy & Water	90,999	7.8	111,026	3.2	-4.6	-59
Manufacturing	137,310	140.1	149,693	119.8	-20.3	-14
Construction	73,596	32.5	103,312	40.5	8.0	25
Distribution; hotels & restaurants	65,696	285.9	81,676	352.6	66.7	23
Transport & Communications	65,696	48.7	81,676	179.4	130.7	268
Banking, Finance & Insurance	55,091	120.9	93,359	341.1	220.3	182
Public Administration	90,999	687.3	111,026	674.1	-13.2	-2
Other Services	65,696	64.1	81,676	72.5	8.5	13
Defence	65696	0.4	81676	0.0	-0.4	-100
Energy	90999	3.4	111026	1.0	-2.4	-70
Fish Farming	146612	0.0	106659	0.0	0.0	-
Fishing	146612	1.0	106659	0.3	-0.7	-69
Marine Construction	73,596	11.6	103312	18.9	7.3	63
Recreation & Tourism	35,900	58.0	56900	90.3	32.3	56
Shipping & Transport	50800	8.0	96200	35.1	27.1	340
Total Key Sectors		82.4		145.6	63.3	77
Total all employees		1387.3		1783.3	396	29

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: Turnover data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

The Table shows:

- Increases in turnover in some groups reporting a decrease in employment;
- Increases are generally greater than the %-age change in employment due to changes in turnover / employee;
- Shipping and transport is the key sector with the most significant increase in turnover due to its strong growth in employment as well as output; and

- Key sectors increased slightly from 6% of total turnover in 2000 to 8% in 2005.

4.12.7 GVA

Table 4.88 reports GVA data for Greenock from 2000–2005 by broad industrial group and key sector.

Table 4.88: Greenock GVA change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	%-age change
Agriculture & Fishing	32,093	0.0	44,562	0.0	0.0	-100
Energy & Water	32,093	2.8	44,562	1.3	-1.5	-53
Manufacturing	37,816	38.6	49,590	39.7	1.1	3
Construction	29,010	12.8	40,761	16.0	3.2	25
Distribution; hotels & restaurants	21,680	94.4	29,747	128.4	34.1	36
Transport & Communications	21,680	16.1	29,747	65.4	49.3	306
Banking, Finance & Insurance	32,963	72.3	38,547	140.9	68.5	95
Public Administration	32,093	242.4	44,562	270.6	28.2	12
Other Services	21,680	21.1	29,747	26.4	5.3	25
Defence	21,680	0.1	29,747	0.0	-0.1	-100
Energy	32,093	1.2	44,562	0.4	-0.8	-66
Fish Farming	58,492	0.0	52,347	0.0	0.0	-
Fishing	58,492	0.4	52,347	0.2	-0.3	-62
Marine Construction	29,010	4.6	40,761	7.5	2.9	63
Recreation & Tourism	15,200	24.5	18,200	28.9	4.3	18
Shipping & Transport	21,600	3.4	33,900	12.4	9.0	265
Total Key Sectors		34.2		49.3	15.0	44
Total all employees		500.5		688.6	188.1	38

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: GVA data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

The data show that:

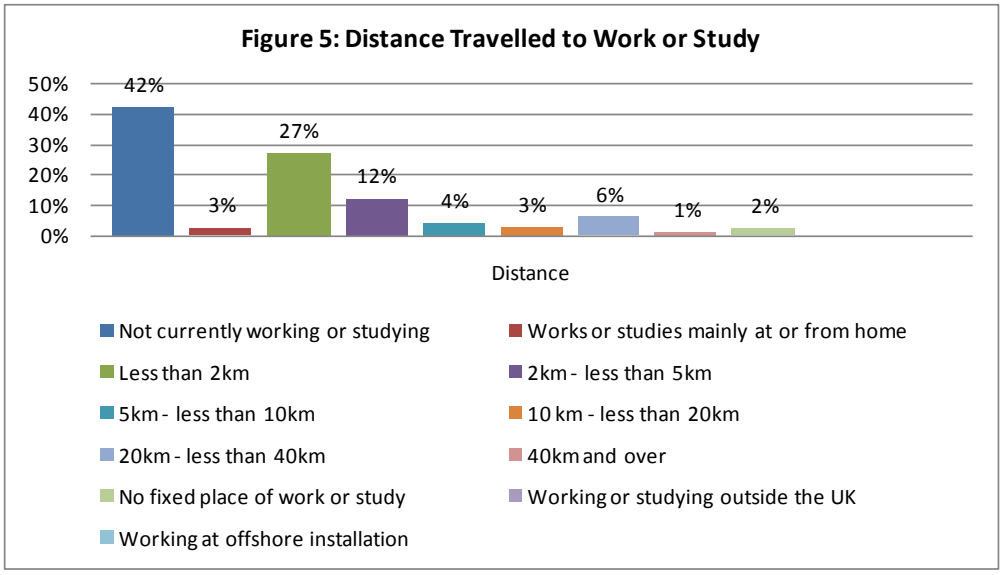
- GVA has increased in some groups that showed a decrease in employment;
- Increases are greater than the %-age changes in employment due to the greater change in GVA/employee;
- Shipping and transport is the key sector with the most significant increase in GVA due to its strong growth in employment as well as output; and

– Key sectors contributed around 7% of Greenock's GVA in 2000 and 2005.

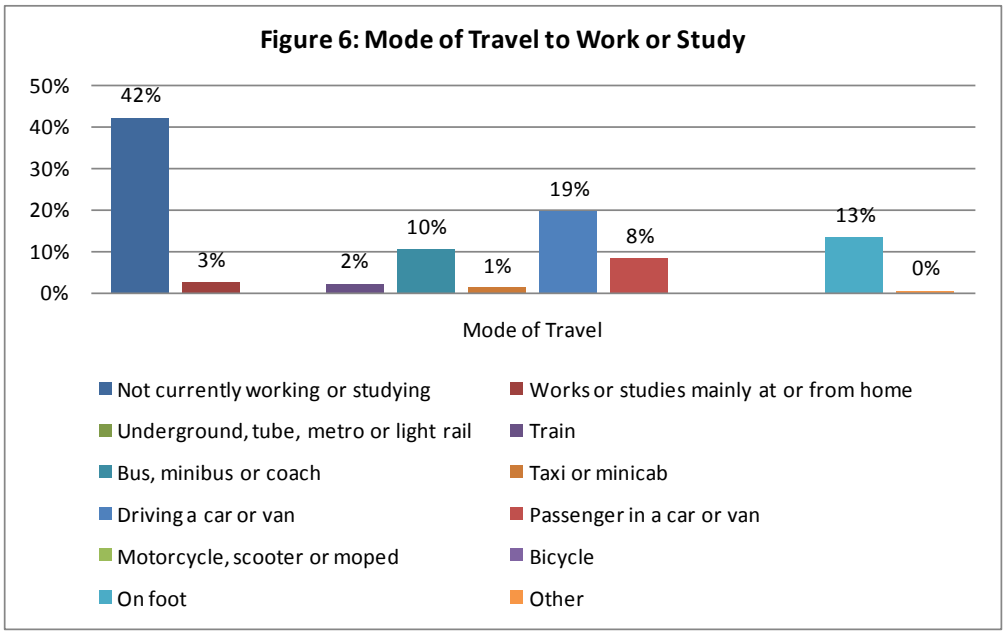
4.12.8 Marine / Port Related Activities

Commuting

Figures 5&6 show the mode and distance reported by those who normally travelled to a place of work or study on Census Day 2001.



Source: 2001 Census



Source: 2001 Census

The Figures show that in 2001:

- 42% of the resident population did not work or study;
- 46% did so at or within 10km of home;
- 7% travelled more than 20km to work or study;
- 28% did so as driver or passenger in a car or van.

Fish Landings

Table 4.89 reports fish landings by volume and value for 2000 and 2006.

Table 4.89: Fish landings at Greenock & Largs by Volume and Value 2000 - 06

	Volume (tonnage)	Value (£)
2000	112.7	319,231
2006	157.8	553,941
Change	45.1	224,710

Source: Scottish Fisheries Statistics 2006.
Note: Landings are not necessarily made by vessels at their home port or harbour. Greenock and Largs are considered as a single "creek", the lowest level of disaggregation for which official figures are available.

The data shows that:

- Live weight tonnage landed increased by 40%; but
- The value of fish landings grew by 70%

Boating & Sailing

Table 4.90 reports the number of berths and moorings available in Greenock and the Firth of Clyde.

Table 4.90: Available Berths and Moorings

	Current		Proposed	
	Greenock	Clyde	Greenock	Clyde
Berths	0	2674	100	5376
Moorings	0	26	0	163
Total	0	2700	100	5539

Source: Clyde Sailing Study

It shows that:

- Greenock currently has no official facilities for touring boats;
- Some development of this kind is planned.

Tourism

Irvine has no attractions ranked among the Top 20 paid or free attractions in Scotland in 2005 but it does have some ranked among the most visited attractions in the Greater Glasgow and the Clyde Valley area:

- McLean Museum and Art Gallery with 19211 visitors; and
- Customs and Excise Museum with 2564.

Ferry Activity

There are no major ferry services to / from Greenock.

However, Clydeport operate the Ocean Terminal cruise liner facility at Greenock. This facility receives the great majority of cruise liner and passengers visits to the Firth of Clyde. Visit Scotland estimate passenger visits as:

- 19,450 in 2002; and
- 39,481 in 2005.

4.12.9 Change Over Time and Potential Projects

There was enough work to maintain a variety of shipyards around Greenock and even to encourage some new investment, but by 1970 they were in serious decline along with much of the local economy. 1800 jobs were lost when the Scott Lithgow yard was mothballed in 1988. The old container port closed the previous year. Greenock suffered severe unemployment in the 1980s and was declared an Enterprise Zone in a bid to attract investment. Employment gradually returned, but in new industries and service sector jobs. Greenock Coastguard took over much of the responsibility when the Oban station was closed. A new container terminal was established to serve whisky and electronics cargos and a facility was also developed to receive increasing numbers of cruise liner passengers on ships visiting the Firth.

Riverside Inverclyde is a £94m 10-year investment programme of residential, commercial and leisure development. It is part of a wider initiative to regenerate much of the Clyde waterfront and, like its sister programme in Clydebank, aims to return brownfield and/or derelict former docks and shipyards to productive use. Part of this is a proposal for 100 sailing berths on waterfront.

A subjective view of the changing influence of the marine environment on Greenock is presented in the graph below.

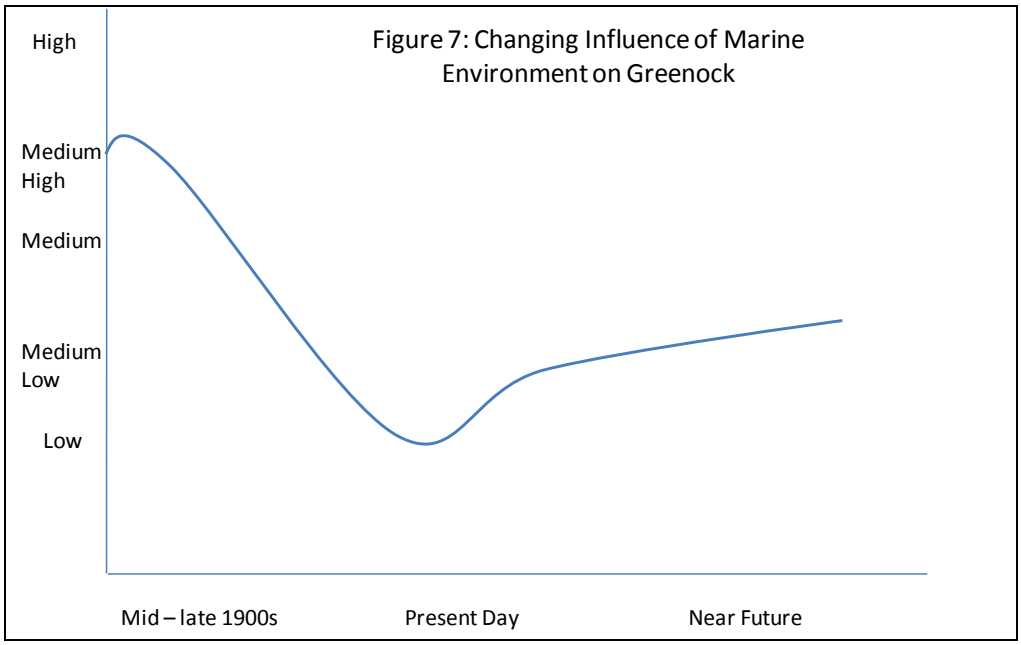


Figure 7: Changing Influence of Marine Environment on Greenock

The graph charts the decline of shipbuilding and docks in the post war decades into the trough of the 1980s. This ends with the recovery of container and cruise liner traffic. Riverfront regeneration gives cause for some future optimism.

4.12.10 Conclusions

The main conclusions from this profile are:

- Population decline is in excess of Strathclyde or Firth of Clyde totals and counter to the trend in outer Firth wards;
- The population profile is ageing – fewer children and more retired people;
- Employment growth is just below regional trends;
- Strong growth of more than 1400 in both transport and banking cancel out a loss of some 1400 jobs in public administration;
- Key sector employment recorded slightly stronger growth due to increases in the shipping and transportation sector;
- The business base fell by 5% in contrast to employment change;
- Most groups recorded a loss except banking and finance;
- The key sector base shrank too except for shipping and transportation;
- Unemployment fell by more than the regional averages;
- Total turnover and GVA grew
- the contribution of key sectors to turnover went up but the contribution to GVA stayed the same;
- much of the population worked locally;
- fish landings increased significantly in volume and value but are worth just over £500,000;
- Greenock has little to offer by way of tourist or visitor attractions;
- Cruise line and merchant vessel activities are an important part of the Greenock economy.

The data analysis for Greenock is summarised in the SWOT analysis presented below.

STRENGTHS	WEAKNESSES
River Clyde (regeneration focus) Natural environment Range of activities already in place Priority of partners Access to Glasgow	Current housing offer Few tourist attractions (no iconic Visitor attraction) Town centre offering (with no access to waterfront)
OPPORTUNITIES	**THREATS**
Redevelopment of waterfront – housing, commercial, leisure Marine based activities – Ocean Terminal Connecting town centre with waterfront Rise in property prices in Glasgow	Waterfront not completed Demographics = declining population, reduced workforce Ongoing social deprivation

4.13 Helensburgh

4.13.1 Introduction

Helensburgh is defined by the following 1991 or 2003 Census Area Statistic (CAS) wards:

- 1991 frozen ward
  - 78UJ07 Helensburgh Central
  - 78UJ06 Helensburgh East
  - 78UJ08 Helensburgh West; and
- 2003 CAS ward
- East Central Helensburgh
  - 04C29 : Helensburgh Central
  - 04C30 : Helensburgh North
  - 04C31 : Helensburgh West
  - 04C32 : West Helensburgh and Rhu

4.13.2 Population

Table 4.91 reports the change in population of Helensburgh from the 1991 Census to 2001 Census

Table 4.91: Helensburgh Population by Age Group

	Children		Working Age (59/64)		Retired		All people
2001							
People	2619	20%	7924	60%	2738	21%	13281
Males	1370	22%	4072	64%	911	14%	6353
Females	1249	18%	3852	56%	1827	26%	6928
1991 People	2932	23%	7766	60%	2260	17%	12,958

Source: 1991 Census, 2001 Census

The Table shows that:

- The population has grown by 2%;
- The proportion of children is down by 3%;
- The working age population is unchanged
- The retired population has increased by 4%.

4.13.3 Employment

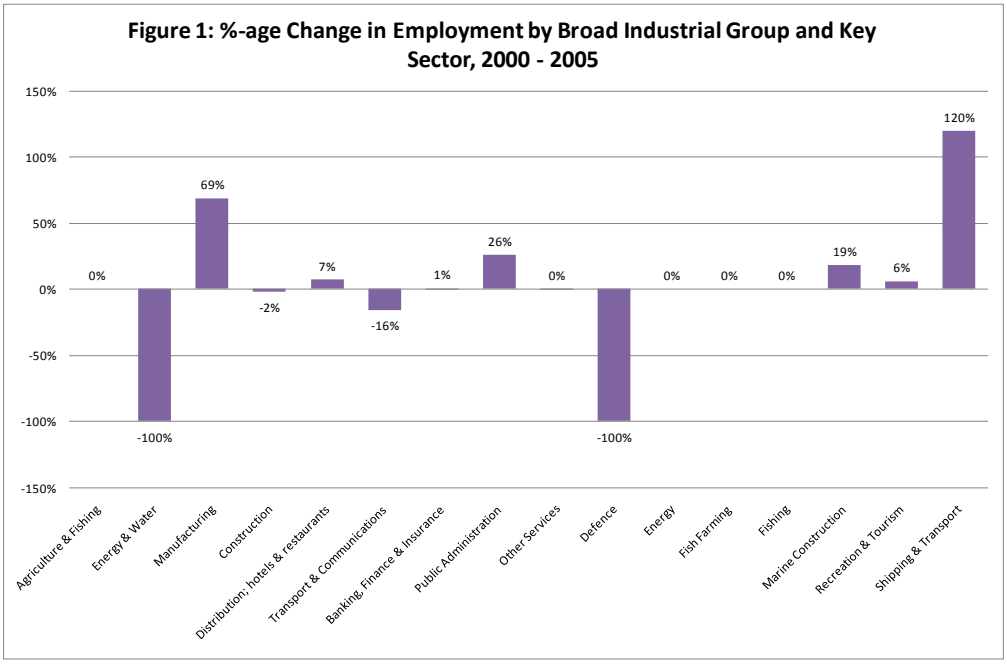
Table 4.92 reports the change in employment in Helensburgh from 2000 – 2005 by broad industrial group and by key sector. Figure 1, over, shows the %-age change in employment over this period.

Table 4.92: Helensburgh Employment change 2000 - 2005

	2000	2005	Change
Agriculture & Fishing	0	0	0
Energy & Water	1	0	-1
Manufacturing	32	54	22
Construction	199	195	-4
Distribution; hotels & restaurants	1,197	1,284	87
Transport & Communications	121	102	-19
Banking, Finance & Insurance	452	455	3
Public Administration	917	1,155	238
Other Services	314	315	1
Defence	5	0	-5
Energy	0	0	0
Fish Farming	0	0	0
Fishing	3	3	0
Marine Construction	108	128	20
Recreation & Tourism	417	442	25
Shipping & Transport	10	22	12

Source: ABI

- Distribution/hotels remain the most important employment group in Helensburgh with 36% of all employees;
- public administration is next with 32%;
- total employment grew by 10% (327 jobs);
- largest growth was in public administration;
- there was slight absolute decline in transport & communications;
- only recreation and tourism of the key sectors is an important employer;
- marine construction also recorded some modest growth;
- there was a net gain of 10% (52 jobs) from the key sectors.

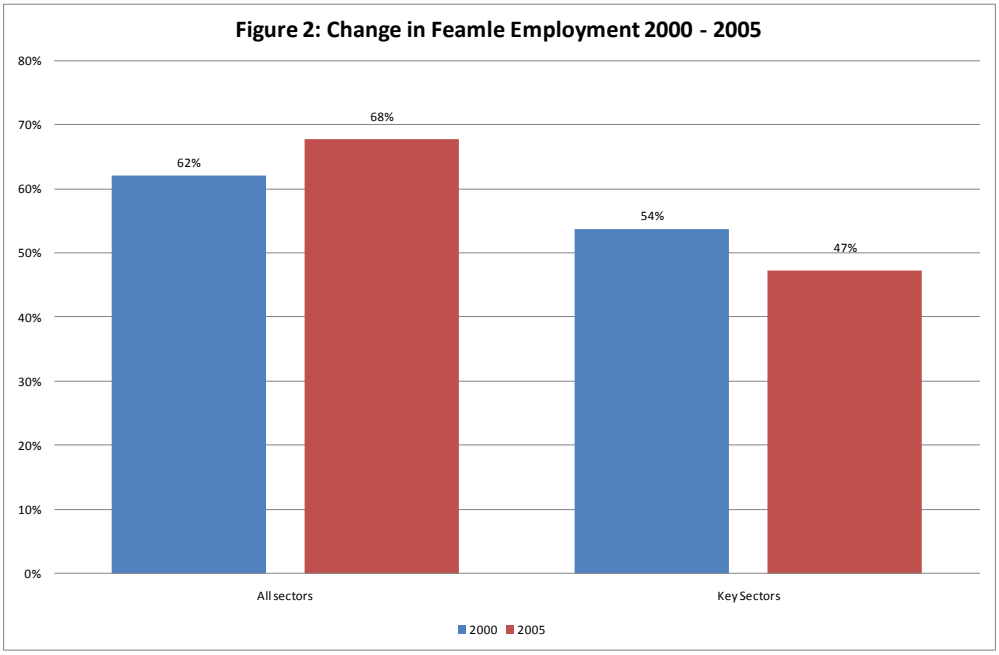


Source: ABI

Figure 2 reports the change in female employment.

It shows that:

- females still make up a majority of Helensburgh's employees
- females have not benefitted more from overall employment growth than males;
- in key sectors females employment has fallen suggesting they have not benefitted from employment growth as much as males.



Source: ABI

4.13.4 Workplaces / Business Base

Table 4.93 reports the change in the workplace / business[37] base in Helensburgh from 2000 – 2005. Figure 3 shows the %-age change in this base.

Table 4.93: Helensburgh Business Base change 2000 - 2005

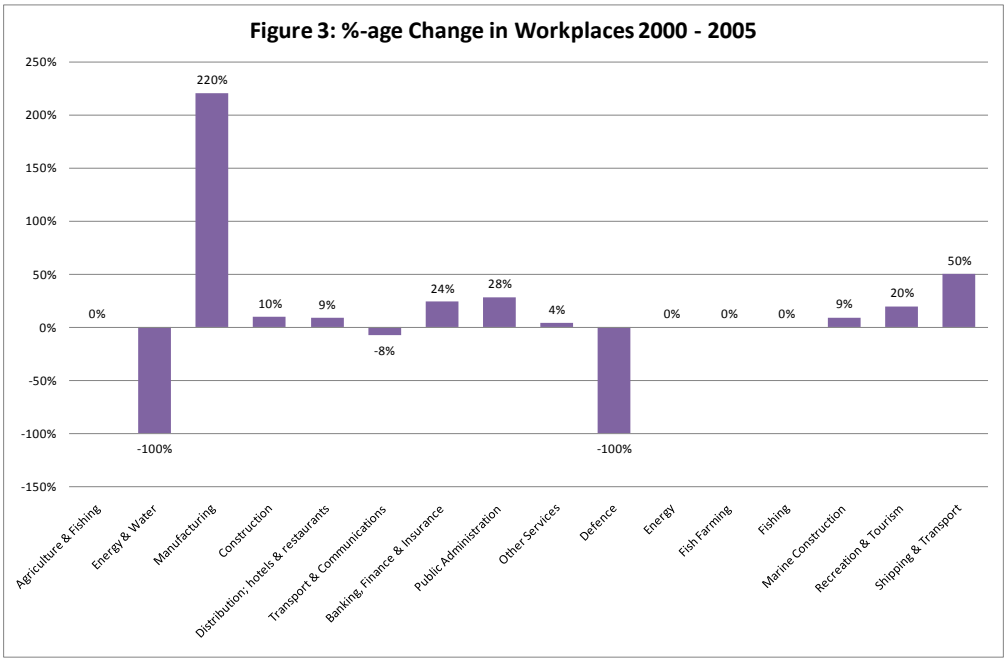
	2000	2005	Change
Agriculture & Fishing	0	0	0
Energy & Water	1	0	-1
Manufacturing	5	16	11
Construction	30	33	3
Distribution; hotels & restaurants	169	184	15
Transport & Communications	13	12	-1
Banking, Finance & Insurance	101	125	24
Public Administration	46	59	13
Other Services	53	55	2
Defence	2	0	-2
Energy	0	0	0
Fish Farming	0	0	0
Fishing	1	1	0
Marine Construction	11	12	1
Recreation & Tourism	46	55	9
Shipping & Transport	2	3	1

Source: ABI

[37] ABI workplaces are widely accepted as a proxy for the business base.

The Table data show:

- Distribution / hotels is still the largest business grouping (38%);
- Banking / finance is next with 26% and public admin with 12%;
- The business base grew by only 66 units (16%);
- Most growth is seen in the three leading groupings;
- Only recreation and tourism is significant of the key sectors;
- Growth in recreation & tourism gave a net gain of 9 units for the key sectors.



Source: ABI

4.13.5 Unemployment

Table 4.94 reports the absolute change in claimant count on Helensburgh from September 2004 – 2005. Figure 4 shows the change in unemployment rates over the same period.

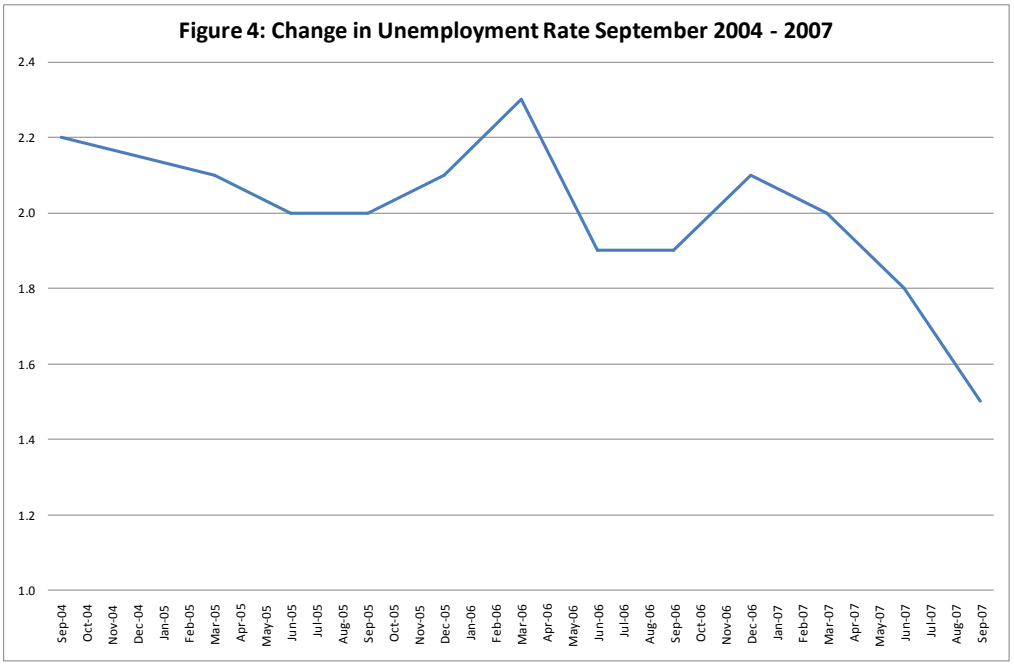
Table 4.94: Absolute Change in Unemployment September 2004 - 2007

2004	177
2005	156
2006	150
2007	117
Change	60
% Change	34%

Source: Claimant Count

The data show that:

- Unemployment has fallen by more than a third in three years
- The absolute change is small



Source: Claimant Count

4.13.6 Turnover

Table 4.95 reports turnover change by broad industrial group and key sector on Helensburgh from 2000 – 2005.

Table 4.95: Helensburgh Turnover change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	% Change
Agriculture & Fishing	90,999	0.0	111,026	0.0	0.0	-
Energy & Water	90,999	0.1	111,026	0.0	-0.1	-100
Manufacturing	137,310	4.4	149,693	8.1	3.7	84
Construction	73,596	14.6	103,312	20.1	5.5	38
Distribution; hotels & restaurants	65,696	78.6	81,676	104.9	26.2	33
Transport & Communications	65,696	7.9	81,676	8.3	0.4	5
Banking, Finance & Insurance	55,091	24.9	93,359	42.5	17.6	71
Public Administration	90,999	83.4	111,026	128.2	44.8	54
Other Services	65,696	20.6	81,676	25.7	5.1	25
Defence	65696	0.3	81676	0.0	-0.3	-100
Energy	90999	0.0	111026	0.0	0.0	-
Fish Farming	146612	0.0	106659	0.0	0.0	-
Fishing	146612	0.4	106659	0.3	-0.1	-27
Marine Construction	73,596	7.9	103312	13.2	5.3	66
Recreation & Tourism	35,900	15.0	56900	25.1	10.2	68
Shipping & Transport	50800	0.5	96200	2.1	1.6	317
Total Key Sectors		24.2		40.8	16.6	69
Total all employees		234.7		337.9	103.2	44

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: Turnover data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

The Table shows:

- Increases in turnover in all groups recording employees in 2005;
- Increases are generally greater than the %-age change in employment due to changes in turnover / employee
- Key sectors show increases in turnover due to increases in turnover/employee. The exception is fishing;
- Key sectors rose from 10% of total turnover in 2000 to 12% in 2005

4.13.7 GVA

Table 4.96 reports GVA data for Helensburgh from 2000 – 2005 by broad industrial group and key sector.

Table 4.96: Helensburgh GVA change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	% Change
Agriculture & Fishing	32,093	0.0	44,562	0.0	0.0	-
Energy & Water	32,093	0.0	44,562	0.0	0.0	-100
Manufacturing	37,816	1.2	49,590	2.7	1.5	121
Construction	29,010	5.8	40,761	7.9	2.2	38
Distribution; hotels & restaurants	21,680	26.0	29,747	38.2	12.2	47
Transport & Communications	21,680	2.6	29,747	3.0	0.4	16
Banking, Finance & Insurance	32,963	14.9	38,547	17.5	2.6	18
Public Administration	32,093	29.4	44,562	51.5	22.0	75
Other Services	21,680	6.8	29,747	9.4	2.6	38
Defence	21,680	0.1	29,747	0.0	-0.1	-100
Energy	32,093	0.0	44,562	0.0	0.0	-
Fish Farming	58,492	0.0	52,347	0.0	0.0	-
Fishing	58,492	0.2	52,347	0.2	0.0	-11
Marine Construction	29,010	3.1	40,761	5.2	2.1	67
Recreation & Tourism	15,200	6.3	18,200	8.0	1.7	27
Shipping & Transport	21,600	0.2	33,900	0.7	0.5	245
Total Key Sectors		10.0		14.2	4.2	42
Total all employees		86.7		130.2	43.5	50

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: GVA data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

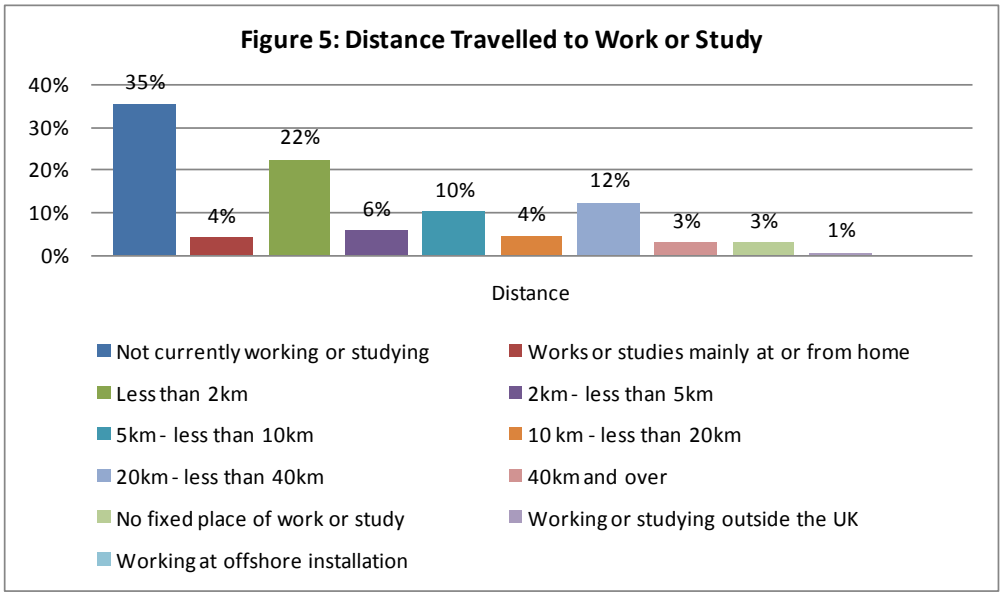
The data show:

- Increases in GVA in all groups recording employees in 2005;
- Increases are greater than the %-age changes in employment due to the greater change in GVA/employee;
- Key sectors show an increase in GVA due to increase in GVA/employee. Fishing is an exception to this;
- Key sectors contributed around 11% of Helensburgh's GVA in 2000 and in 2005.

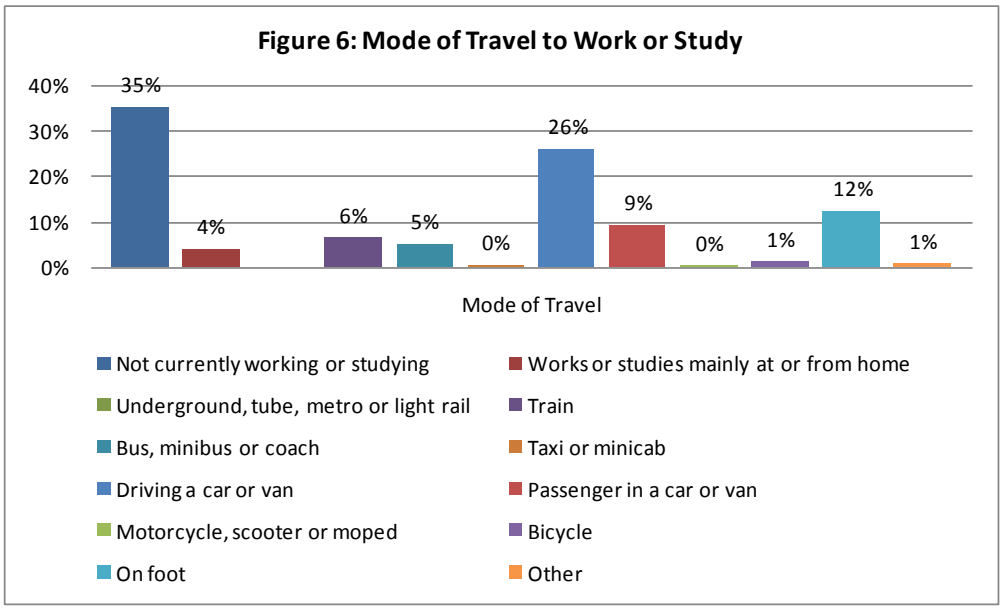
4.13.8 Marine / Port Related Activities

Commuting

Figures 4&5 show the mode and distance reported by those who normally travelled to a place of work or study on Census Day 2001.



Source: 2001 Census



Source: 2001 Census

The Figures show that in 2001:

- 35% of the resident population did not work or study;
- 42% did so at or within 10km of home;
- 15% travelled more than 20km to work or study;

- 35% did so as driver or passenger in a car, taxi or van.

Fish Landings

There are no recorded fish landings at Helensburgh.

Boating & Sailing

Table 4.97 reports the number of berths and moorings available in Helensburgh / Rhu and the Firth of Clyde.

Table 4.97: Available Berths and Moorings

	Current		Proposed	
	Helensburgh	Clyde	Helensburgh	Clyde
Berths	250	2674	150	5376
Moorings	0	26	0	163
Total	0	2700	150	5539

Source: Clyde Sailing Study

It shows that:

- Helensburgh currently has almost 10% of berth for touring boats;
- Significant further development of this kind is planned but the proportion of berths on the Clyde will fall to just over 7%.

Tourism

Helensburgh offers easy access to Loch Lomond National Park. The settlement has no attractions ranked among the Top 20 paid or free attractions in Scotland in 2005. However, it does have two ranked visitor attractions in the AILLST area:

- Hill House with 27362 visitors; and
- Geilston House with 9442.

Ferry Activity

There is no ferry service to / from Helensburgh.

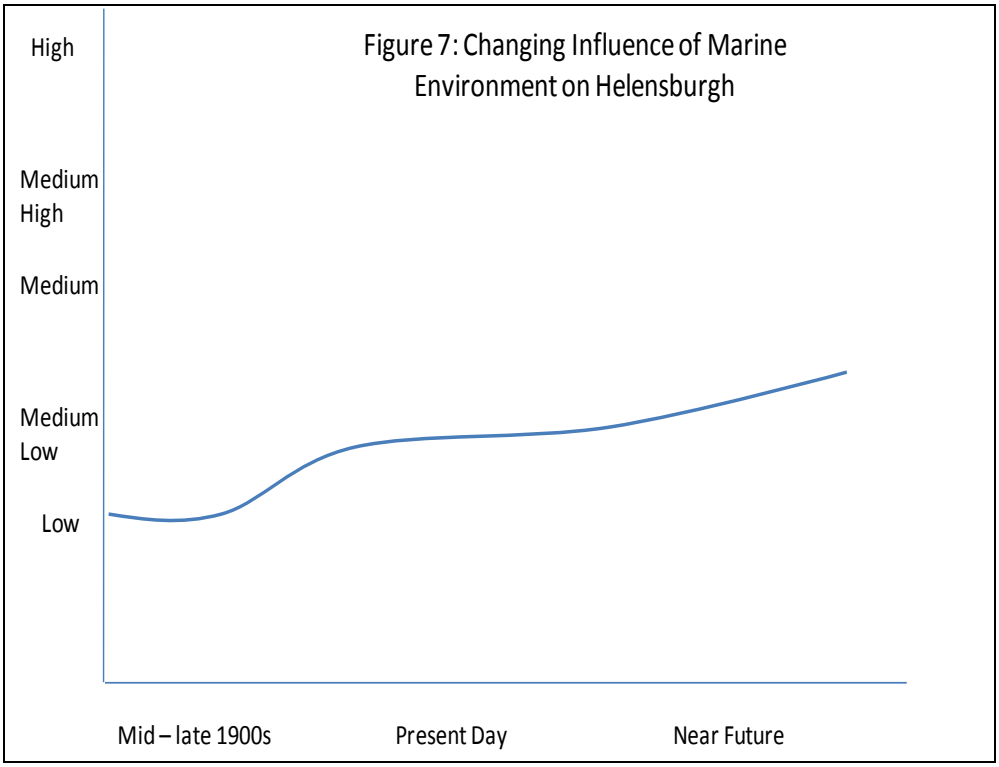
4.13.9 Change Over Time and Potential Projects

Historically Helensburgh has not been a commercial or industrial town, nor does it engage in much marine activity despite the fact that it is situated on the Firth of Clyde coast. Historically, the area was known as a minor yachting resort and this was enhanced in 1992 when the Royal Clyde Yacht Club of Hunter's Quay merged with the Royal Northern Yacht Club of Rothesay and moved to a recent marina development at Rhu. This encouraged developers of a water sports complex to buy the long-disused Craigendoran pier in 1994.

Helensburgh has retained a reputation as a well-to-do dormitory town on the railway linking it with Glasgow to the east and Fort William to the north. It is also home to large numbers of naval and civilian personnel at the nearby Clyde Submarine Base at Faslane

Major projects in the area appear to focus on Helensburgh town centre and waterfront, with a mixture of retail and residential projects documented in the 2004 Helensburgh Town Centre and Waterfront action plan as well as public realm improvements and redevelopment of areas such as Central Station. There are also proposals for a significant (150) increase of berths at Rhu marina

A subjective view of the changing influence of the marine environment on Greenock is presented in the graph below.



The graph charts the slow but steadily rising influence of the marine environment on activities in Helensburgh. The rise in the mid-1960s comes with the establishment of CSB at Faslane with many personnel living in Helensburgh. Future growth is predicated on the success of the marina and watersports complex at Rhu.

4.13.10 Conclusions

The main conclusions from this profile are:

- Population growth is slightly above the Firth and Strathclyde trends but below the growth levels found in the outer wards;

- The profile of the population has aged –growth in the proportion retired residents but fewer children;
- Employment growth of 10% is better than the Firth and Strathclyde average;
- Of the broad industrial groups, growth is concentrated in public administration and distribution/hotels;
- Of the key sectors growth is in marine construction, recreation and shipping;
- Business base growth was also good and concentrated in the main employment groups;
- Unemployment fell more sharply than the regional averages but in absolute terms the change was only 60 persons;
- Turnover and GVA change is largely driven by changes in productivity per employee. The contribution of key sectors has remained broadly stable;
- Most residents work locally. More than usual travel further than 20km;
- Helensburgh has significant facilities for boating and sailing with some further development of this sort is planned;
- Helensburgh has no major tourist attractions but does offer facilities for boating / sailing and good access to the National Park, Argyll and Glasgow.

The data analysis for Helensburgh is summarised in the SWOT analysis presented below.

STRENGTHS	WEAKNESSES
Scenic location; road/rail links to Glasgow; National Park	Run down town centre and waterfront; poor quality of food and drink offer; not pedestrian and cyclist friendly
OPPORTUNITIES	**THREATS**
Regenerate town centre and waterfront; improve pedestrian environment	Lack of focus and regeneration vehicle

4.14 Irvine

4.14.1 Introduction

Irvine is defined by the following 1991 or 2003 Census Area Statistic (CAS) wards:

- 1991 frozen ward
  - 78UH04 Irvine North
  - 78UH02 Irvine Townhead
  - 78UH03 Irvine Vineburgh
  - 78UH01 Irvine West
  - 78UH05 Irvine Woodlands; and
- 2003 CAS ward
  - 22C04 : Irvine North
  - 22C02 : Irvine Townhead
  - 22C03 : Irvine Vineburgh and Woodlands South
  - 22C01 : Irvine West

4.14.2 Population

Table 4.98 reports the change in population of Irvine from the 1991 Census to 2001 Census

Table 4.98: Irvine Population by Age Group

	Children		Working Age (59/64)		Retired		All people
2001							
People	3449	19%	10874	61%	3447	19%	17770
Males	1741	21%	5465	65%	1197	14%	8403
Females	1708	18%	5409	58%	2250	24%	9367
1991 People	4293	21%	12457	61%	3588	18%	20,356

Source: 1991 Census, 2001 Census

The Table shows that:

- The population has fallen by 13%
- The proportion of children is down 2%

- The working age population is unchanged
- The retired population has increased by 1%.

4.14.3 Employment

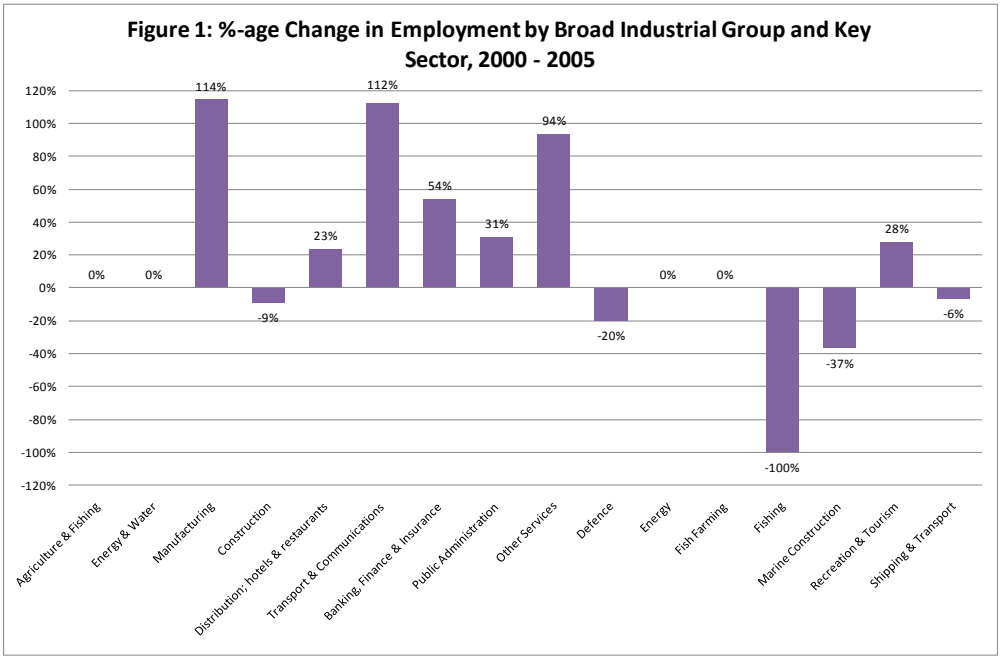
Table 4.99 reports the change in employment in Irvine from 2000 – 2005 by broad industrial group and by key sector. Figure 1, over, shows the %-age change in employment over this period.

Table 4.99: Irvine Employment change 2000 - 2005

	2000	2005	Change
Agriculture & Fishing	0	1	1
Energy & Water	0	0	0
Manufacturing	1,501	3,218	1,717
Construction	383	349	-34
Distribution; hotels & restaurants	3,039	3,753	714
Transport & Communications	333	707	374
Banking, Finance & Insurance	839	1,291	452
Public Administration	3,475	4,556	1,081
Other Services	509	985	476
Defence	10	8	-2
Energy	0	81	81
Fish Farming	0	0	0
Fishing	19	0	-19
Marine Construction	100	63	-37
Recreation & Tourism	996	1,273	277
Shipping & Transport	33	31	-2

Source: ABI

- Public administration remains the most important employment group in Irvine with 31% of all employees;
- Distribution/hotels is next with 25% followed by manufacturing with 22%;
- total employment grew by 47% (4781 jobs)
- manufacturing employment more than doubled (+1717);
- public administration also grew by more than 1,000;
- distribution / hotels increased by over 700;
- only recreation and tourism of the key sectors is an important employer;
- energy established a presence in the town;
- there was a net gain of 26% (298 jobs) in the key sectors.

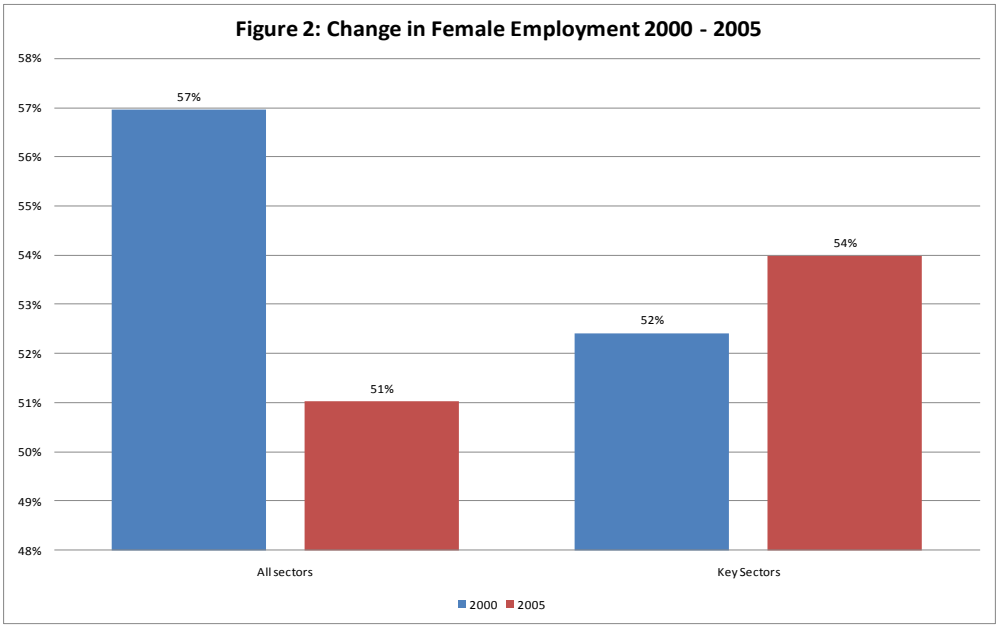


Source: ABI

Figure 2 reports the change in female employment.

It shows that:

- females still make up an increased majority of Irvine's employees
- females have benefited more from overall employment growth;
- in key sectors females have not done quite so well.



Source: ABI

4.14.4 Workplaces / Business Base

Table 4.100 reports the change in the workplace / business[38] base in Irvine from 2000 – 2005. Figure 3 shows the %-age change in this base.

Table 4.100: Irvine Business Base change 2000 - 2005

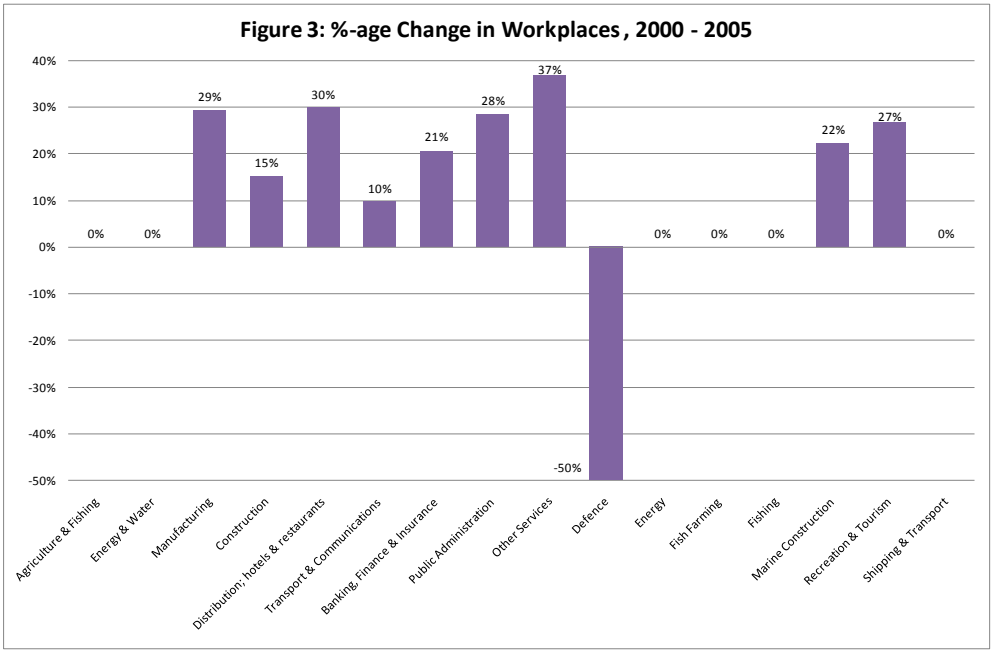
	2000	2005	Change
Agriculture & Fishing	0	1	1
Energy & Water	0	0	0
Manufacturing	58	75	17
Construction	46	53	7
Distribution; hotels & restaurants	235	305	70
Transport & Communications	31	34	3
Banking, Finance & Insurance	126	152	26
Public Administration	102	131	29
Other Services	57	78	21
Defence	2	1	-1
Energy	0	1	1
Fish Farming	0	0	0
Fishing	1	1	0
Marine Construction	9	11	2
Recreation & Tourism	83	105	22
Shipping & Transport	5	5	0

Source: ABI

The Table data show:

- Distribution / hotels is unchanged as the largest business grouping (37%);
- Banking / finance is next with 18% and public admin with 16%;
- The business base grew by 174 units (27%);
- All groups present in the settlement recorded growth;
- Only recreation and tourism is significant of the key sectors;
- Growth in recreation & tourism gave a net gain of 24 units for the key sectors.

[38] ABI workplaces are widely accepted as a proxy for the business base.



Source: ABI

4.14.5 Unemployment

Table 4.101 reports the absolute change in claimant count on Irvine from September 2004 – 2005. Figure 4 shows the change in unemployment rates over the same period.

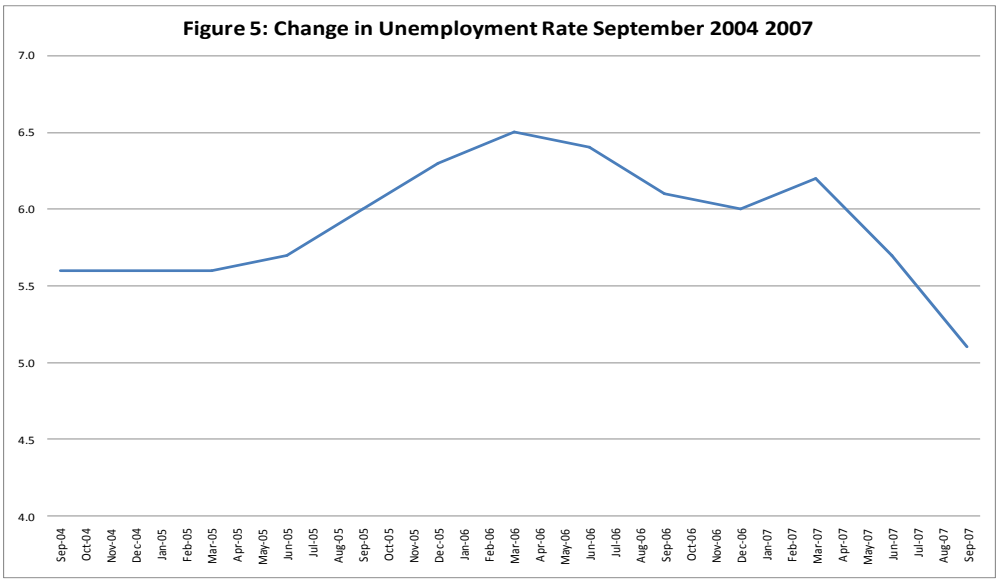
Table 4.101: Absolute Change in Unemployment September 2004 - 2007

2004	606
2005	653
2006	658
2007	552
Change	-52
% Change	-9%

Source: Claimant Count

The data show that:

- Unemployment has fallen over the three years
- The absolute and %-age change is small
- From a high of 6.5% (710) in March 06 unemployment is now at its lowest point of the last three years 5.1% (552).



Source: Claimant Count

4.14.6 Turnover

Table 4.102 reports turnover change by broad industrial group and key sector on Irvine from 2000 – 2005.

Table 4.102: Irvine Turnover change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	% Change
Agriculture & Fishing	90,999	0.0	111,026	0.1	0.1	-
Energy & Water	90,999	0.0	111,026	0.0	0.0	-
Manufacturing	137,310	206.1	149,693	481.7	275.6	134
Construction	73,596	28.2	103,312	36.1	7.9	28
Distribution; hotels & restaurants	65,696	199.7	81,676	306.5	106.9	54
Transport & Communications	65,696	21.9	81,676	57.7	35.9	164
Banking, Finance & Insurance	55,091	46.2	93,359	120.5	74.3	161
Public Administration	90,999	316.2	111,026	505.8	189.6	60
Other Services	65,696	33.4	81,676	80.5	47.0	141
Defence	65696	0.7	81676	0.7	0.0	-1
Energy	90999	0.0	111026	9	9	-
Fish Farming	146612	0.0	106659	0.0	0.0	-
Fishing	146612	2.8	106659	0.0	-2.8	-100
Marine Construction	73,596	7.4	103312	6.5	-0.9	-12
Recreation & Tourism	35,900	35.8	56900	72.4	36.7	103
Shipping & Transport	50800	1.7	96200	3.0	1.3	78
Total Key Sectors		48.2		91.6	43.3	90
Total all employees		851.7		1589.0	737.3	87

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: Turnover data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

The Table shows:

- all groups present in Irvine show an increase in turnover;
- Increases are generally greater than the %-age change in employment due to changes in turnover / employee
- Key sectors show increases in turnover except for fishing and marine construction;
- Key sectors stayed at around 6% of total turnover in 2000 and 2005.

4.14.7 GVA

Table 4.103 reports GVA data for Irvine from 2000 – 2005 by broad industrial group and key sector.

Table 4.103: Irvine GVA change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	% Change
Agriculture & Fishing	32,093	0.0	44,562	0.0	0.0	-
Energy & Water	32,093	0.0	44,562	0.0	0.0	-
Manufacturing	37,816	56.8	49,590	159.6	102.8	181
Construction	29,010	11.1	40,761	14.2	3.1	28
Distribution; hotels & restaurants	21,680	65.9	29,747	111.6	45.8	69
Transport & Communications	21,680	7.2	29,747	21.0	13.8	191
Banking, Finance & Insurance	32,963	27.7	38,547	49.8	22.1	80
Public Administration	32,093	111.5	44,562	203.0	91.5	82
Other Services	21,680	11.0	29,747	29.3	18.3	166
Defence	21,680	0.2	29,747	0.2	0.0	10
Energy	32,093	0.0	44,562	3.6	3.6	-
Fish Farming	58,492	0.0	52,347	0.0	0.0	-
Fishing	58,492	1.1	52,347	0.0	-1.1	-100
Marine Construction	29,010	2.9	40,761	2.6	-0.3	-11
Recreation & Tourism	15,200	15.1	18,200	23.2	8.0	53
Shipping & Transport	21,600	0.7	33,900	1.1	0.3	47
Total Key Sectors		20.1		30.6	10.6	53
Total all employees		291.2		588.6	297.4	102

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: GVA data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

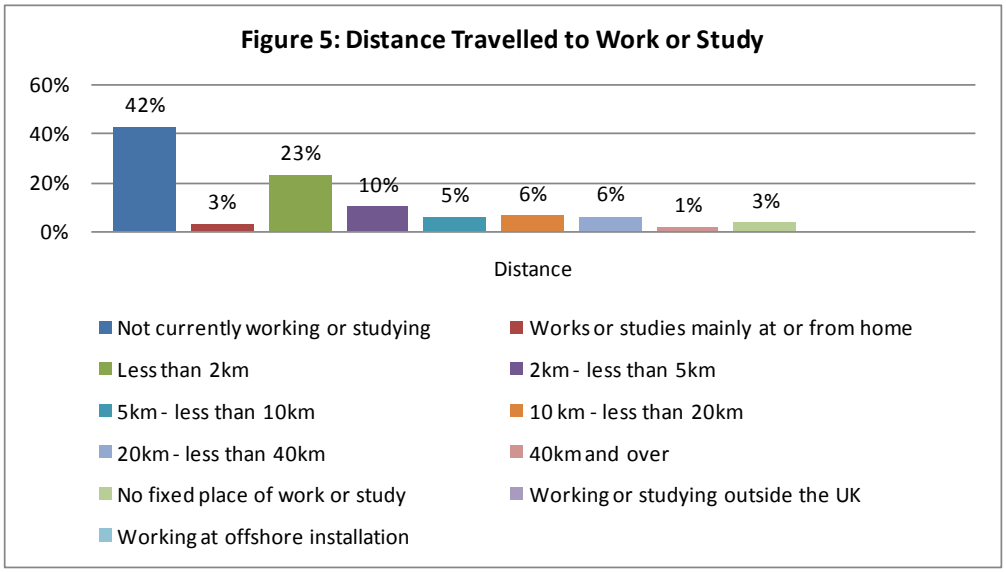
The data show that:

- All groups still present in Irvine show an increase in GVA;
- Increases are greater than the %-age changes in employment due to the greater change in GVA/employee;
- Key sectors show an increase in GVA. Marine construction is an exception to this;
- Key sectors decreased from contributing 7% of GVA in 2000 to contributing 5% in 2005.

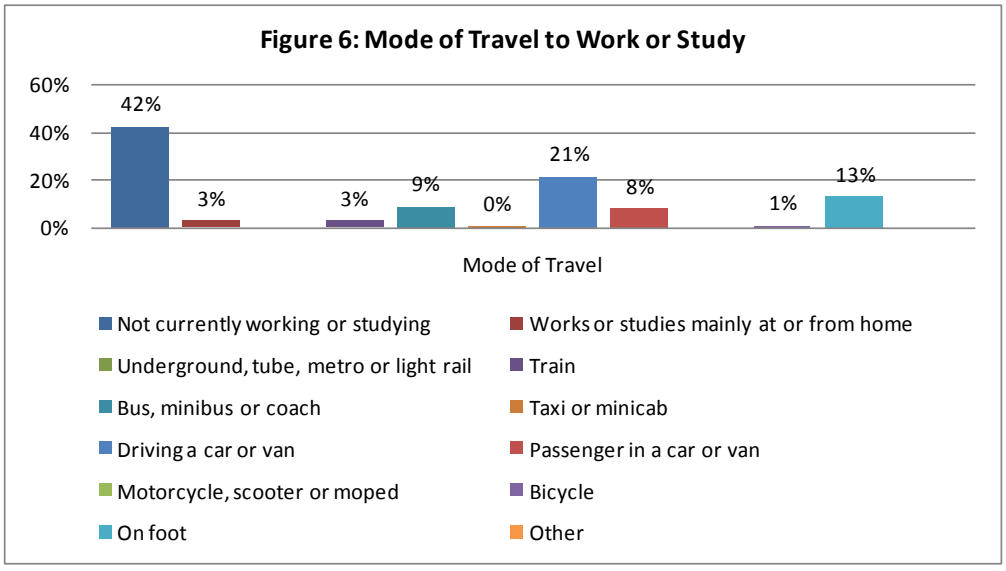
4.14.8 Marine / Port Related Activities

Commuting

Figures 5&6 show the mode and distance reported by those who normally travelled to a place of work or study on Census Day 2001.



Source: 2001 Census



Source: 2001 Census

The Figures show that in 2001:

- 42% of the resident population did not work or study;
- 41% did so at or within 10km of home;
- 7% travelled more than 20km to work or study;

- 29% did so as driver or passenger in a car or van.

Fish Landings

There are no recorded fish landings at Irvine.

Boating & Sailing

Table 4.104 reports the number of berths and moorings available in Brodick Harbour and the Firth of Clyde.

Table 4.104: Available Berths and Moorings

	Current		Proposed	
	Irvine	Clyde	Irvine	Clyde
Berths	0	2674	50	5376
Moorings	0	26	0	163
Total	0	2700	50	5539

Source: Clyde Sailing Study

It shows that:

- Irvine currently has no official facilities for touring boats;
- Some modest development of this kind is planned.

Tourism

Irvine has no attractions ranked among the Top 20 paid or free attractions in Scotland in 2005 but it does have some ranked among the most visited attractions in Ayrshire:

- Scottish Maritime Museum with 21964; and
- Vennel Gallery with 4080.

Ferry Activity

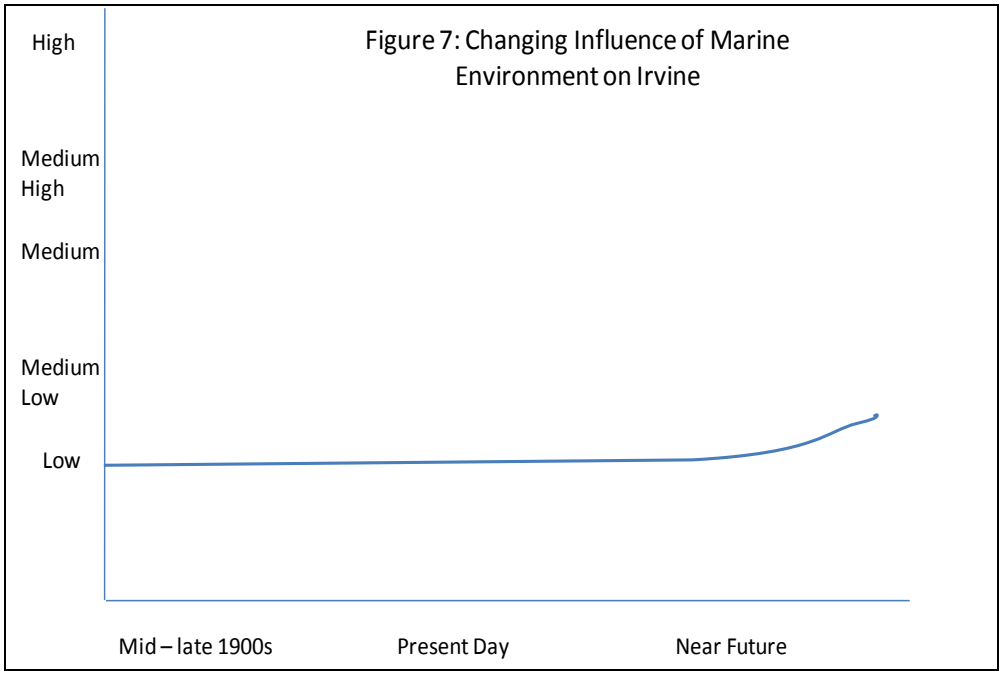
There are no major ferry services to / from Irvine.

4.14.9 Change Over Time and Potential Projects

The genesis of Irvine New Town was an SDD paper in 1963 with formal designation as such in 1966. Irvine does not engage in much marine activity despite its location by the sea. Most employment and economic activity looked inland. Historic industrial activity has left legacy of environmental problems in the bay area. However, the transformation of Irvine Harbourside that started in the 1970s is one of the most complete and most impressive of the many such redevelopments across the UK. South of the River Irvine and bordering the coast is Irvine Beach Park. In 1976 this became home to the Magnum Centre which by the end of the 1980s was Scotland's single most popular attraction with over a million visitors per year. Ironically, most visitors were local or West of Scotland residents in the years when Irvine recorded record UK unemployment figures. It remains hugely successful today. The Scottish Maritime Museum is also found in Irvine.

Irvine town centre and Irvine Bay regeneration projects are both managed by Irvine Bay URC, which has recently secured substantial public funds to continue physical redevelopment works. Included in this are proposals for a small number of berths in the harbour.

A subjective view of the changing influence of the marine environment on Irvine is presented in the graph below.



The graph charts the relatively low maritime influence in Irvine despite its seafront location. Regeneration work along the harbour front may change this.

4.14.10 Conclusions

The main conclusions from this profile are:

- Population decline is counter to the Firth and Strathclyde trends and also the growth levels found in the outer wards;
- The age profile of the population has increased – growth in the proportion retired residents at the expense of the child population;
- Employment growth of 47% is well above the Firth and Strathclyde average;
- Of the broad industrial groups, only construction records a decline in employment;
- Of the key sectors, the last fishing related employment is lost but energy establishes a new presence;
- Business base growth was also above regional averages;
- Unemployment has not fallen as much as the regional averages;
- Turnover and GVA change driven by changes in productivity per employee coupled with strong employment growth. The contribution of key sectors to turnover was stable but fell for GVA;
- Most residents work locally;
- Irvine currently has no dedicated facilities for boating and sailing but some development of this sort is planned;
- Irvine does not rely on the sea or maritime sectors for its prosperity.

The data analysis for Irvine is summarised in the SWOT analysis presented below.

STRENGTHS	WEAKNESSES
At centre of Ayrshire's transport and commercial network	Declining town centre
OPPORTUNITIES	**THREATS**
Town in core investment area of URC	Environmental problems in Irvine Bay, retail and leisure leakage
Housing development	Failure to invest in waterfront redevelopment

4.15 Largs

4.15.1 Introduction

Largs is defined by the following 1991 or 2003 Census Area Statistic (CAS) wards:

- 1991 frozen wards
  - 78UH29: Fairlie, Skelmorlie and Cumbrae;
  - 78UH28: Largs North;
  - 78UH27: Largs South.
- 2003 CAS wards
  - 22C18: Kilbirnie South;
  - 22C28: Largs East;
  - 22C29: Largs North and Skelmorlie;
  - 22C26: Largs South and Fairlie.

4.15.2 Population

Table 4.105 reports the change in population of Largs from the 1991 Census to 2001 Census.

Table 4.105: Largs Population by Age Group

	Children		Working Age (59/64)		Retired		All people
2001							
People	2709	17%	8925	57%	3905	25%	15,539
Males	1400	19%	4575	62%	1381	19%	7,356
Females	1309	16%	4350	53%	2524	31%	8,183
1991 People	2,666	23%	8,648	54%	4,730	29%	16,044

Source: 1991 Census, 2001 Census

The Table shows that:

- The population has decreased by 3%;
- The proportion of children has decreased from 23% to 17%;
- The working age population has increased from 54% to 57%; and
- The retired population has decreased from 29% to 25%.

4.15.3 Employment

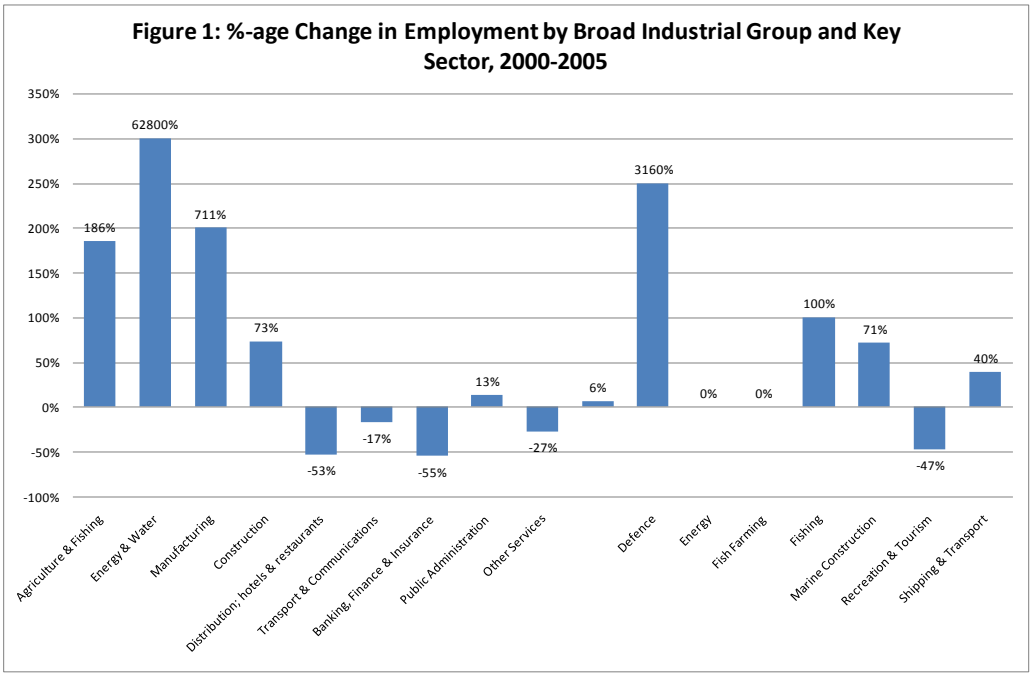
Table 4.106 reports the change in employment in Largs from 2000–2005 by broad industrial group and by key sector. Figure 1, over, shows the %-age change in employment over this period.

- Public administration is now the most important employment group in Largs with 34% of all employees;
- Distribution/hotels is next with 17%;
- total employment rose by 6% (230 jobs);
- there was a significant increase in energy/water and manufacturing employment;
- defence, energy and recreation and tourism of the key sectors are important employers with 1,600 employees; and
- there was a net increase of 80% (826 jobs) from the key sectors with very significant growth in defence and energy counterbalancing a steep fall in recreation and leisure.

Table 4.106: Largs Employment change 2000 - 2005

	2000	2005	Change
Agriculture & Fishing	7	20	13
Energy & Water	1	629	628
Manufacturing	53	430	377
Construction	166	288	122
Distribution; hotels & restaurants	1,387	651	-736
Transport & Communications	178	148	-30
Banking, Finance & Insurance	379	172	-207
Public Administration	1,180	1,339	159
Other Services	355	259	-96
Defence	17	545	528
Energy	0	607	607
Fish Farming	0	0	0
Fishing	19	38	19
Marine Construction	49	84	35
Recreation & Tourism	849	448	-401
Shipping & Transport	96	134	38

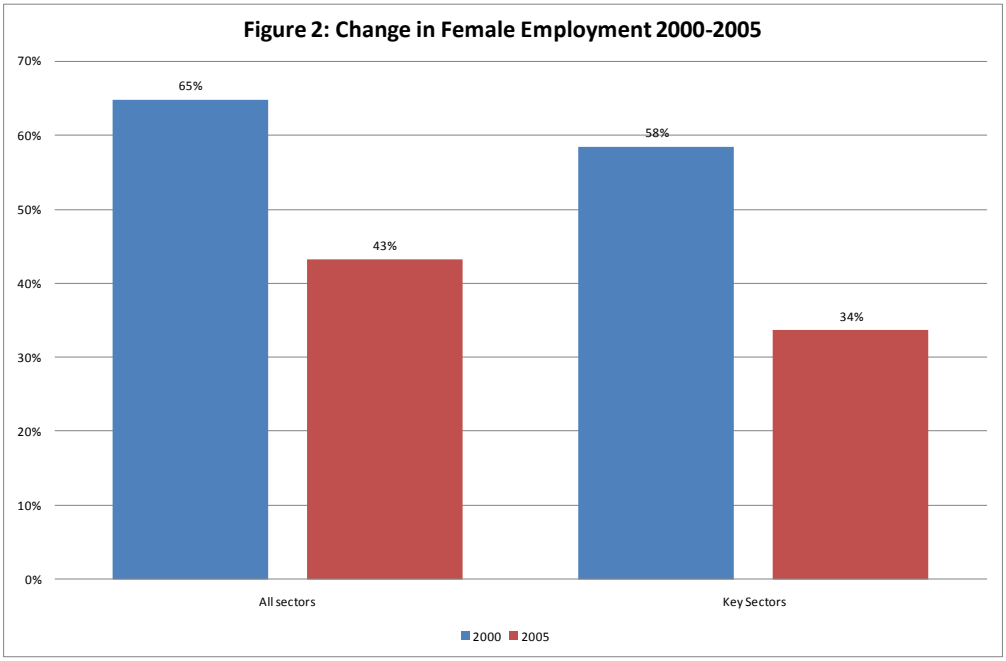
Source: ABI



Source: ABI

Note: % change for energy and water, manufacturing and defence are much higher than indicated on the vertical axis. The data labels above the columns represent the real % change in these industries.

Figure 2 reports the change in female employment.



Source: ABI

It shows that:

- in all sectors females have gone from a substantial majority of Larg's employees to a significant minority;
- females have not benefitted from overall employment growth as much as males; and
- in key sectors the decline is even greater;
- this suggests females suffered the bulk of any job losses but secured few of the new employment opportunities.

4.15.4 Workplaces / Business Base

Table 4.107 reports the change in the workplace / business[39] base in Largs from 2000 – 2005. Figure 3 shows the %-age change in this base.

Table 4.107: Largs Business Base change 2000 - 2005

	2000	2005	Change
Agriculture & Fishing	7	6	-1
Energy & Water	1	3	2
Manufacturing	17	28	11
Construction	46	38	-8
Distribution; hotels & restaurants	190	108	-82
Transport & Communications	20	14	-6
Banking, Finance & Insurance	114	95	-19
Public Administration	63	41	-22
Other Services	74	48	-26
Defence	2	1	-1
Energy	0	2	2
Fish Farming	0	0	0
Fishing	9	7	-2
Marine Construction	14	13	-1
Recreation & Tourism	94	46	-48
Shipping & Transport	6	7	1

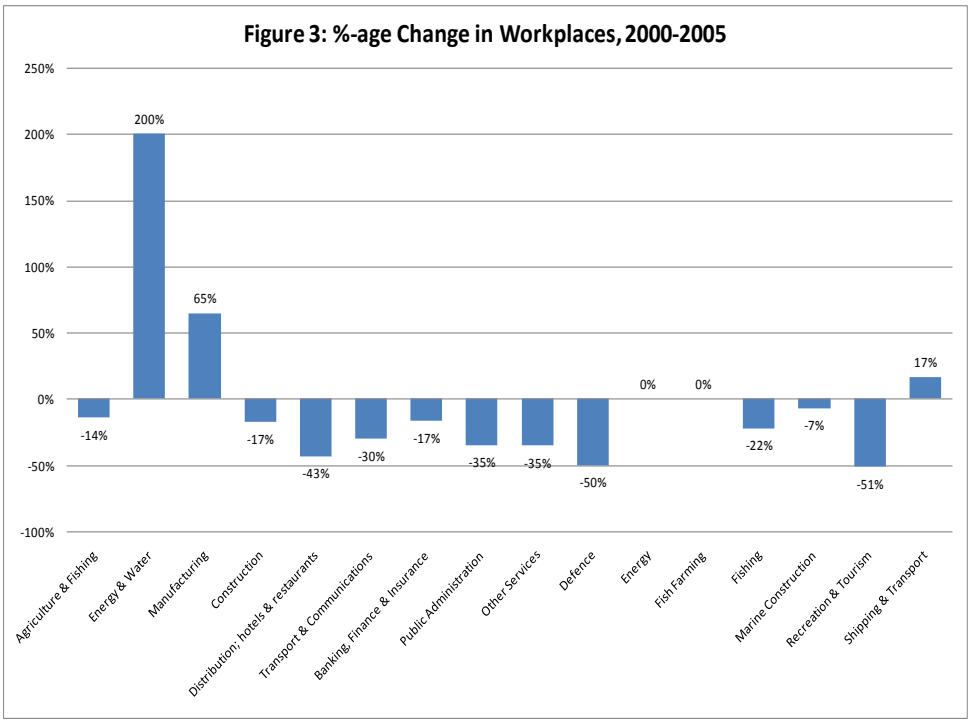
Source: ABI

The Table data show:

- Distribution / hotels is still the largest business grouping (28%);
- Banking/finance is next with 25%;
- The business base decreased by 151 units (28%);
- Only manufacturing recorded any significant growth; and

[39] ABI workplaces are widely accepted as a proxy for the business base.

– Only recreation and tourism is significant of the key sectors, however it experienced a decline of 48 units over the intervening period.



Source: ABI

4.15.5 Unemployment

Table 4.108 reports the absolute change in claimant count in Largs from September 2004–2007. Figure 4 shows the change in unemployment rates over the same period.

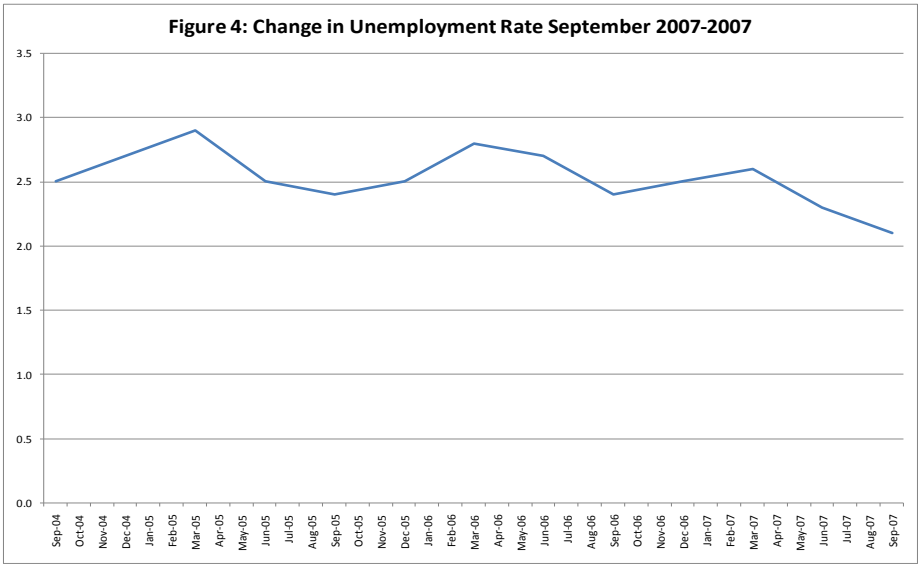
Table 4.108: Absolute Change in Unemployment September 2004 - 2007

2004	230
2005	221
2006	225
2007	191
Change	-39
% Change	-17%

Source: Claimant Count

The data show that:

- Unemployment has fallen by nearly a fifth in three years;
- The absolute change is relatively small.



Source: Claimant Count

4.15.6 Turnover

Table 4.109 reports turnover change by broad industrial group and key sector in Largs from 2000–2005.

Table 4.109: Largs Turnover change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	%-age Change
Agriculture & Fishing	90,999	0.6	111,026	2.2	1.6	249
Energy & Water	90,999	0.1	111,026	69.8	69.7	76643
Manufacturing	137,310	7.3	149,693	64.4	57.1	784
Construction	73,596	12.2	103,312	29.8	17.5	144
Distribution; hotels & restaurants	65,696	91.1	81,676	53.2	-37.9	-42
Transport & Communications	65,696	11.7	81,676	12.1	0.4	3
Banking, Finance & Insurance	55,091	20.9	93,359	16.1	-4.8	-23
Public Administration	90,999	107.4	111,026	148.7	41.3	38
Other Services	65,696	23.3	81,676	21.2	-2.2	-9
Defence	65696	1.1	81676	44.5	43.4	3886
Energy	90999	0.0	111026	67.4	67.4	-
Fish Farming	146612	0.0	106659	0.0	0.0	-
Fishing	146612	2.8	106659	4.1	1.3	45
Marine Construction	73,596	3.6	103312	8.7	5.1	141
Recreation & Tourism	35,900	30.5	56900	25.5	-5.0	-16
Shipping & Transport	50800	4.9	96200	12.9	8.0	164
Total Key Sectors		42.9		163.0	120.2	280
Total all employees		274.6		417.3	142.7	52

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: Turnover data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved

The Table shows:

- Increases in turnover in the same groups reporting increase in employment;
- Increases are generally greater than the %-age change in employment due to changes in turnover / employee;
- Recreation and tourism is the only key sector which shows a decrease in turnover; and
- Key sectors increased from 16% of total turnover in 2000 to 39% in 2005.

4.15.7 GVA

Table 4.110 reports GVA data for Largs from 2000–2005 by broad industrial group and key sector.

Table 4.110: Largs GVA change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	%-age change
Agriculture & Fishing	32,093	0.2	44,562	0.9	0.7	297
Energy & Water	32,093	0.0	44,562	28.0	28.0	87238
Manufacturing	37,816	2.0	49,590	21.3	19.3	964
Construction	29,010	4.8	40,761	11.7	6.9	144
Distribution; hotels & restaurants	21,680	30.1	29,747	19.4	-10.7	-36
Transport & Communications	21,680	3.9	29,747	4.4	0.5	14
Banking, Finance & Insurance	32,963	12.5	38,547	6.6	-5.9	-47
Public Administration	32,093	37.9	44,562	59.7	21.8	58
Other Services	21,680	7.7	29,747	7.7	0.0	0
Defence	21,680	0.4	29,747	16.2	15.8	4299
Energy	32,093	0.0	44,562	27.0	27.0	-
Fish Farming	58,492	0.0	52,347	0.0	0.0	-
Fishing	58,492	1.1	52,347	2.0	0.9	79
Marine Construction	29,010	1.4	40,761	3.4	2.0	141
Recreation & Tourism	15,200	12.9	18,200	8.2	-4.8	-37
Shipping & Transport	21,600	2.1	33,900	4.5	2.5	119
Total Key Sectors		17.9		61.4	43.5	243
Total all employees		99.1		159.8	60.7	61

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: GVA data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved

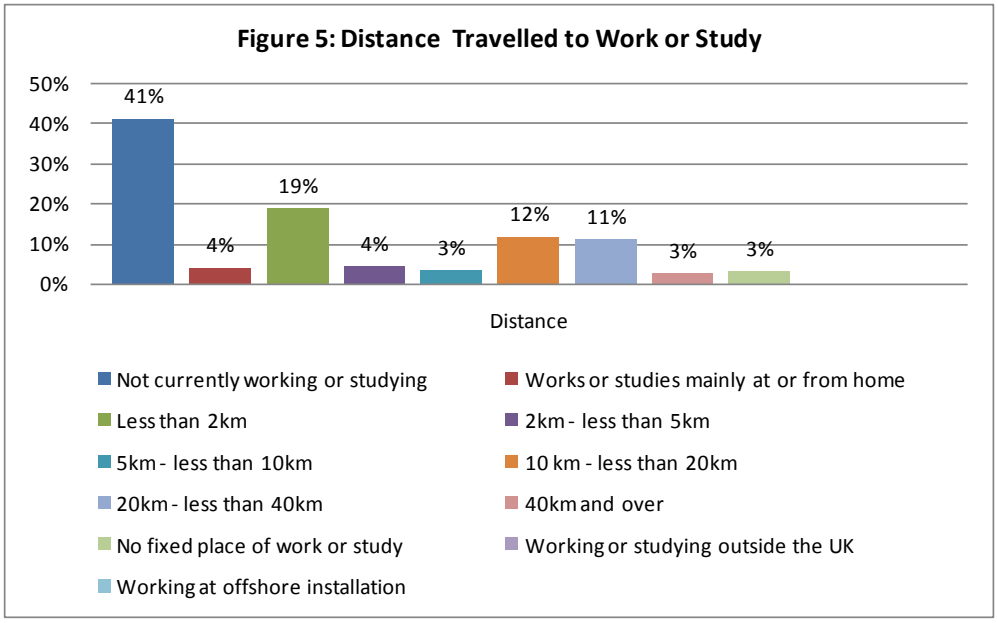
The data show that:

- GVA has increased in the same groups that showed an increase in employment;
- Increases are greater than the %-age changes in employment due to the greater change in GVA/employee;
- Marine construction is the only key sector which shows a decrease in GVA; and
- Key sectors have risen sharply from contributing 18% of Larg's GVA in 2000 to contributing 38% in 2005.

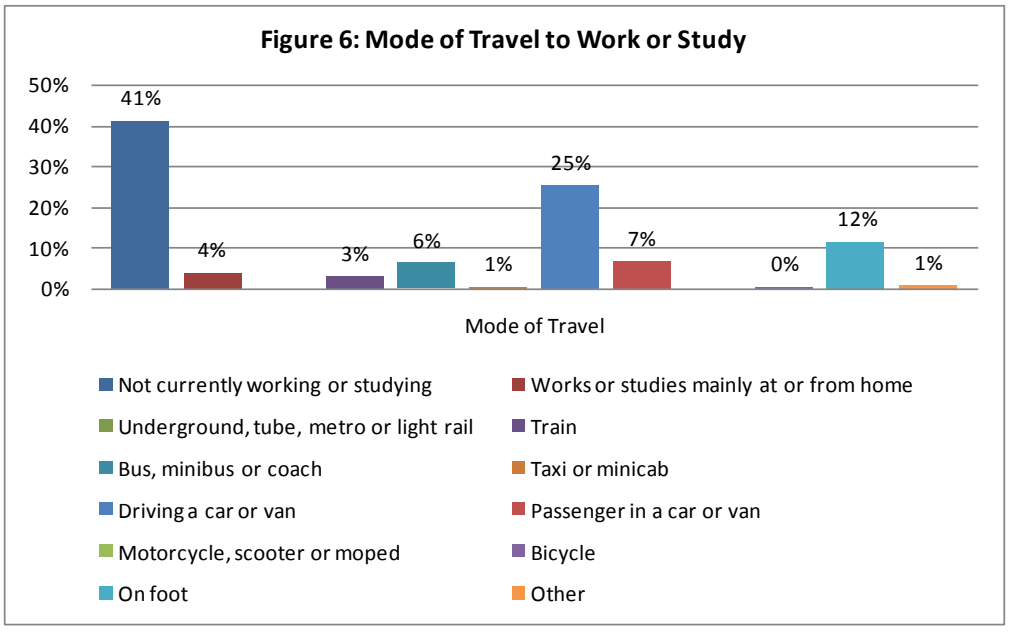
4.15.8 Marine / Port Related Activities

Commuting

Figures 5&6 show the mode and distance reported by those who normally travelled to a place of work or study on Census Day 2001.



Source: 2001 Census



Source: 2001 Census

The Figures show that in 2001:

- 41% of the resident population did not work or study;
- 30% did so at or within 10km of home;
- 14% travelled more than 20km to work or study;
- 33% did so as driver or passenger in a car or van.

Fish Landings

Table4.111 reports fish landings by volume and value for 2000 and 2006.

Table 4.111: Fish landings at Greenock & Largs by Volume and Value 2000 - 06

	Volume (tonnage)	Value (£)
2000	112.7	319,231
2006	157.8	553,941
Change	45.1	224,710

Source: Scottish Fisheries Statistics 2006.
Note: Landings are not necessarily made by vessels at their home port or harbour. Greenock and Largs are considered as a single "creek", the lowest level of disaggregation for which official figures are available.

The data shows that:

- Live weight tonnage landed increased by 40%; but
- The value of fish landings grew by 70%

Boating & Sailing

Table 4.112 reports the number of berths and moorings available in Largs and the Firth of Clyde.

Table 4.112: Available Berths and Moorings

	Current		Proposed	
	Largs	Clyde	Largs	Clyde
Berths	700	2674	0	5376
Moorings	0	26	0	163
Total	700	2700	0	5539

Source: Clyde Sailing Study

It shows that:

- Largs currently has 26% of official facilities for touring boats;
- No further development of this kind is planned.

Tourism

Largs has no attractions ranked among the Top 20 paid or free attractions in Scotland in 2005. However, it does have a ranked visitor attraction in the Ayrshire and Arran area:

- Vikingar with 21491 visitors.

Ferry Activity

Table 4.113: reports change in traffic on the Ardrossan – Brodick ferry route, the main ferry service between Arran and the mainland.

Table 4.113: Ferry Traffic Largs - Cumbrae 2000 - 2005

Largs	2000	2005	Change	% change
Passengers	623274	698551	75277	12%
Cars	112721	135901	23180	21%
Commercial & buses	3789	5327	1538	41%
Clyde				
Passengers	3013200	3256000	242800	8%
Cars	567800	636700	68900	12%
Commercial & buses	50400	51200	800	2%

Source: Scottish Government Water Transport Statistics 2006

The Table shows that:

- There has been significant growth in ferry traffic to/from Largs;
- This growth was more than that for the whole Firth of Clyde;
- In 2005 Ardrossan – Brodick accounted for
  - 11% of Clyde passenger traffic
  - 21% of car traffic
  - 10% of commercial vehicle / bus traffic

4.15.9 Change Over Time and Potential Projects

Historically Largs is a residential and resort town which does not engage much in marine activity. Steamer services to Wemyss Bay and Millport continued into the 1970s when a ro-ro ferry to Cumbrae was introduced. Although the summer trade was hit by the growth of cheap foreign holidays in the same decade, the number of small hotels and guest hoses in Largs has recovered. Development and expansion of a large marina in the 1980s & 90s and growth in passenger traffic following the electrification of the railway are, no doubt, important factors in this. However, for most of the last 20 years Largs has been home to a substantial retired population. The nuclear power stations at Hunterston to the south of Largs are important local employers. Hunterston is being decommissioned but Hunterston B is still generating electricity.

Largs is not scheduled for regeneration in the same way as other seaside Ayrshire towns. A new railway station and Park & Ride scheme are the major projects proposed.

A subjective view of the changing influence of the marine environment on Largs is presented in the graph below.

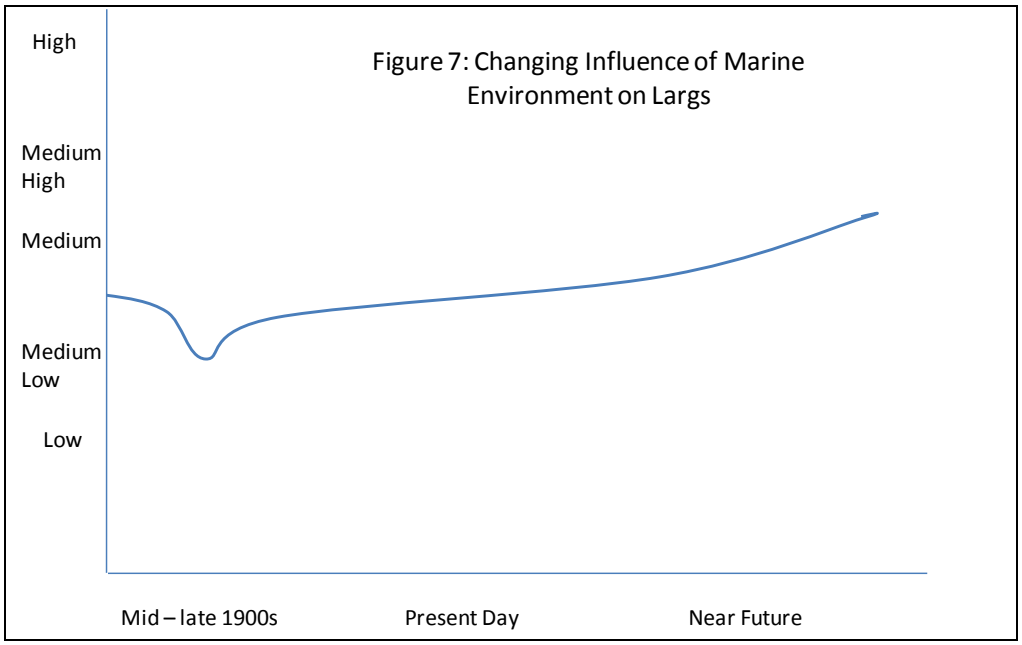


Figure 7: Changing Influence of Marine Environment on Largs

The graph charts the importance of Largs as a seaside resort, the dip in this trade caused by cheap package tours abroad and the recovery brought about by nuclear power, rail electrification and marina development. Further exploitation of the watersports leisure market around the already sizeable marina is likely.

4.15.10 Conclusions

The main conclusions from this profile are:

- Population decline is slightly more than the regional average and is counter to the growth seen in the outer firth wards;
- The population profile is unusual in that the proportion of children and retired people has fallen;
- Employment growth (+6%) was in line with regional change but the dramatic change in key sector employment (+80%) is not;
- Key sectors of defence and energy are the driver behind growth in employment;
- Decline in recreation and tourism is behind the falls in distribution/hotels and other services groups;
- Female employment appears to suffer badly from the changed employment profile;
- The business base decline significantly with losses in most groups and sectors;
- Fewer people seem to work locally than for other settlements;
- Fish landings increased significantly in volume and value but are still worth just over £500,000;
- Largs sees significant volumes of ferry traffic going to / from Cumbrae island;
- Largs already has large scale facilities for touring boats and yachts;
- Maritime related activity is important to the local economy.

The data analysis for Largs is summarised in the SWOT analysis presented below.

STRENGTHS	WEAKNESSES
Sailing Institute and Sportscotland National Centre Day-trip destination	Not part of core development area in AJSP Lack of accommodation and parking, esp. at SSI
OPPORTUNITIES	**THREATS**
Sailing tourism Expansion of Largs Marina	Not part of core development area in AJSP Competition from other day visitor destinations Future of Hunterston nuclear power stations

4.16 Loch Fyne

4.16.1 Introduction

Loch Fyne is defined by the following 1991 or 2003 Census Area Statistic (CAS) wards:

- 1991 frozen wards
  - 78UB07: Craignish-Glenaray;
  - 78UB21: East Lochfyne;
  - 78UB06: Knapdale-Lochgilphead;
  - 78UB03: North Kintyre.
- 2003 CAS wards
  - 04C07: Craignish – Glenaray;
  - 04C21: East Lochfyne;
  - 04C05: Knapdale;
  - 04C06: Lochgilphead.

4.16.2 Population

Table 4.114 reports the change in population of Loch Fyne from the 1991 Census to 2001 Census.

Table 4.114: Loch Fyne Population by Age Group

	Children		Working Age (59/64)		Retired		All people
2001							
People	1966	18%	6679	63%	2028	19%	10673
Males	984	19%	3335	64%	880	17%	5199
Females	982	18%	3344	61%	1148	21%	5474
1991 People	2378	19%	7239	59%	2741	22%	12,358

Source: 1991 Census, 2001 Census

The Table shows that:

- The population has decreased by 14%;
- The proportion of children has decreased slightly from 19% to 18%;

- The working age population has increased from 59% to 63%; and
- The retired population has decreased from 22% to 19%.

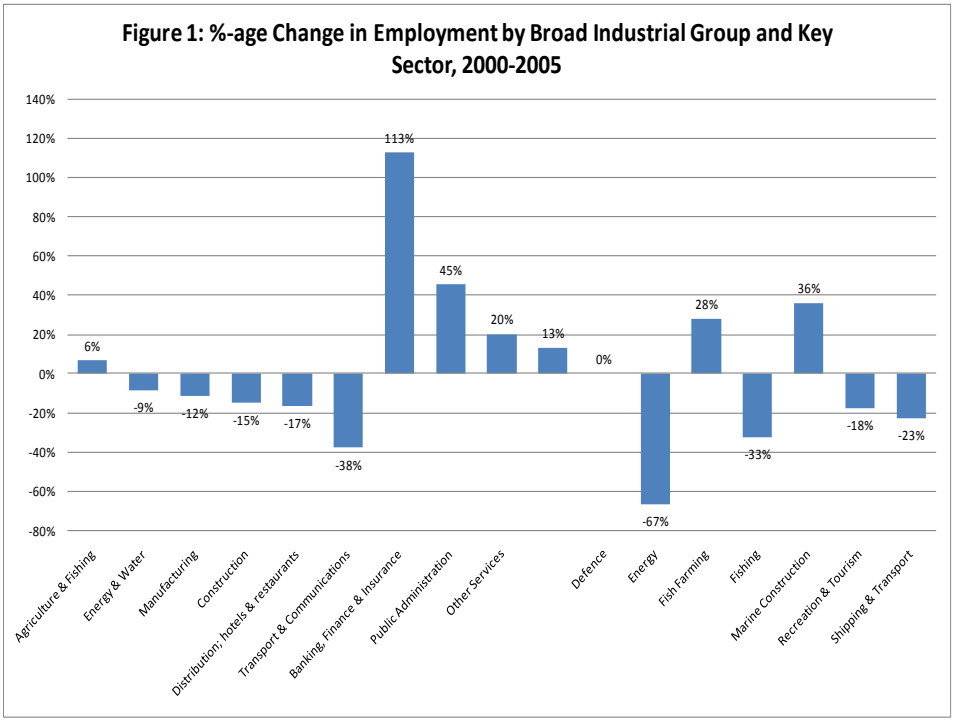
4.16.3 Employment

Table 4.115 reports the change in employment in Loch Fyne from 2000–2005 by broad industrial group and by key sector. Figure 1, over, shows the %-age change in employment over this period.

Table 4.115: Loch Fyne Employment change 2000 - 2005

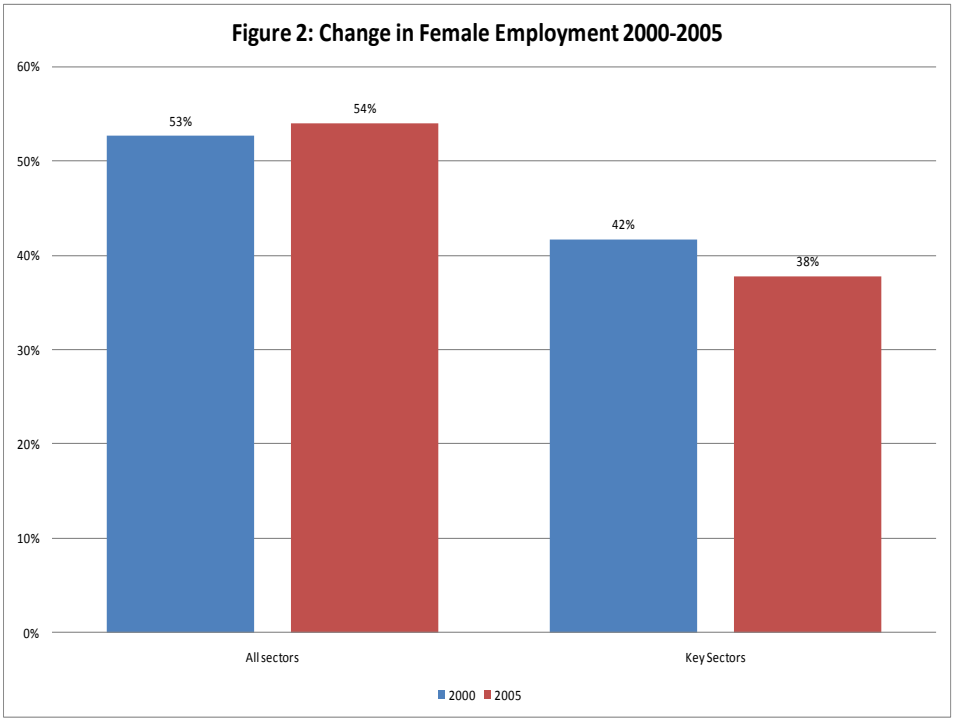
	2000	2005	Change
Agriculture & Fishing	391	416	25
Energy & Water	80	73	-7
Manufacturing	234	207	-27
Construction	479	407	72
Distribution; hotels & restaurants	1,287	1,071	-216
Transport & Communications	239	148	-91
Banking, Finance & Insurance	206	438	232
Public Administration	1,619	2,352	733
Other Services	225	270	45
Defence	2	2	0
Energy	15	5	-10
Fish Farming	175	224	49
Fishing	178	120	-58
Marine Construction	217	295	78
Recreation & Tourism	767	630	-137
Shipping & Transport	83	64	-19

- Public administration remains the most important employment group in Loch Fyne with 44% of all employees;
- Distribution/hotels is next with 20%;
- total employment rose by 13% (622 jobs);
- there was a significant increase in public admin, and banking/finance employment;
- recreation/tourism, marine construction and fish farming/fishing of the key sectors are important employers; and
- there was a net loss of 7% (97 jobs) from the key sectors.



Source: ABI

Figure 2 reports the change in female employment.



Source: ABI

It shows that:

- in all sectors females still make up a majority of Loch Fyne's employees;
- females have benefitted from overall employment growth more than males; and
- in key sectors the proportion of females in employment has decreased by 4% suggesting they may have suffered disproportionately to males in job losses.

4.16.4 Workplaces / Business Base

Table 4.116 reports the change in the workplace / business[40] base in Loch Fyne from 2000 – 2005. Figure 3 shows the %-age change in this base.

Table 4.116: Loch Fyne Business Base change 2000 - 2005

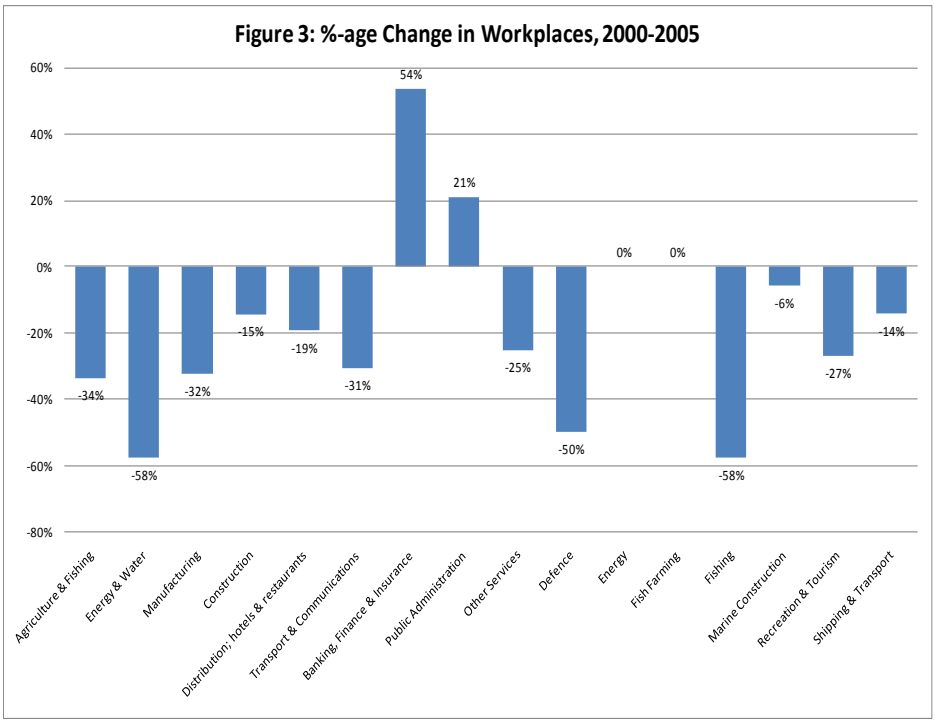
	2000	2005	Change
Agriculture & Fishing	92	61	-31
Energy & Water	26	11	-15
Manufacturing	37	25	-12
Construction	55	47	-8
Distribution; hotels & restaurants	216	174	-42
Transport & Communications	39	27	-12
Banking, Finance & Insurance	69	106	37
Public Administration	81	98	17
Other Services	67	50	-17
Defence	2	1	-1
Energy	2	2	0
Fish Farming	10	10	0
Fishing	57	24	-33
Marine Construction	17	16	-1
Recreation & Tourism	107	78	-29
Shipping & Transport	14	12	-2

Source: ABI

The Table data show:

- Distribution / hotels is still the largest business grouping (26%);
- Banking/finance is next with 16%;
- The business base decreased by 83 units (14%);
- Only banking/finance and public admin recorded any growth; and
- Only recreation and tourism is significant of the key sectors, however it experienced a decline of 29 units over the intervening period. Fishing suffered a bigger absolute and %-age loss.

[40] ABI workplaces are widely accepted as a proxy for the business base.



Source: ABI

4.16.5 Unemployment

Table 4.117 reports the absolute change in claimant count in Loch Fyne from September 2004–2007. Figure 4 shows the change in unemployment rates over the same period.

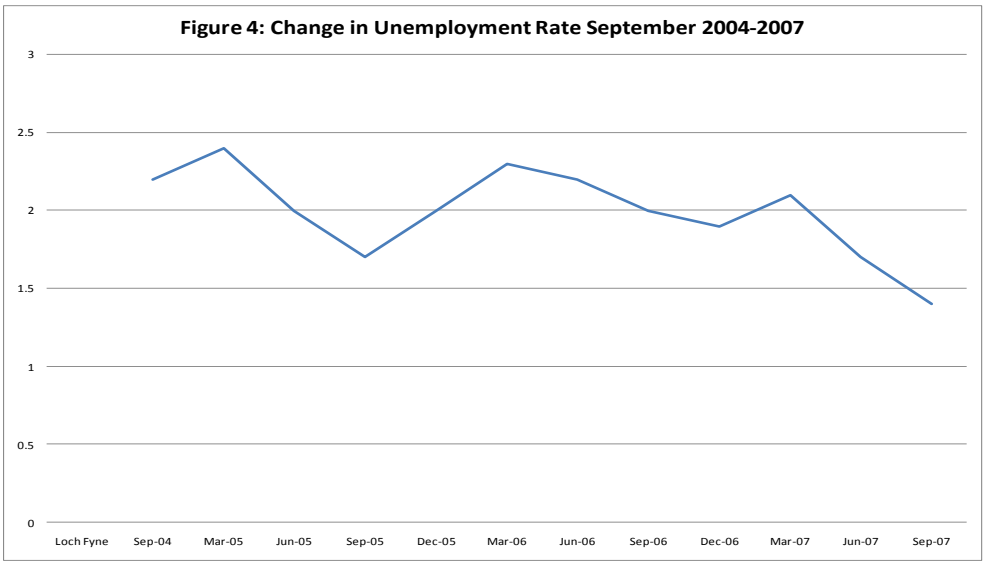
Table 4.117: Absolute Change in Unemployment September 2004 - 2007

2004	139
2005	109
2006	125
2007	91
Change	-48
% Change	-35%

Source: Claimant Count

The data show that:

- Unemployment has fallen by more than a third in three years;
- The absolute change is not great.



Source: Claimant Count

4.16.6 Turnover

Table 4.118 reports turnover change by broad industrial group and key sector in Loch Fyne from 2000–2005.

Table 4.118: Loch Fyne Turnover change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	%-age Change
Agriculture & Fishing	90,999	35.6	111,026	46.2	10.6	30
Energy & Water	90,999	7.3	111,026	8.1	0.8	11
Manufacturing	137,310	32.1	149,693	31.0	-1.1	-4
Construction	73,596	35.3	103,312	42.0	6.8	19
Distribution; hotels & restaurants	65,696	84.6	81,676	87.5	2.9	3
Transport & Communications	65,696	15.7	81,676	12.1	-3.6	-23
Banking, Finance & Insurance	55,091	11.3	93,359	40.9	29.5	260
Public Administration	90,999	147.3	111,026	266.1	113.8	77
Other Services	65,696	14.8	81,676	22.1	7.3	49
Defence	65696	0.1	81676	0.2	0.0	24
Energy	90999	1.4	111026	0.6	-0.8	-59
Fish Farming	146612	25.7	106659	23.9	-1.8	-7
Fishing	146612	26.1	106659	12.8	-13.3	-51
Marine Construction	73,596	16.0	103312	30.5	14.5	91
Recreation & Tourism	35,900	27.5	56900	35.8	8.3	30
Shipping & Transport	50800	4.2	96200	6.2	1.9	46
Total Key Sectors		101.0		109.9	8.9	9
Total all employees		384.0		551	167	43

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: Turnover data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

The Table shows:

- Increases in turnover in some groups reporting a decrease in employment;
- Increases are generally greater than the %-age change in employment due to changes in turnover / employee;
- Public administration and banking are the groups driving up turnover;

- Marine construction shows a significant increase in turnover as employment as well as output grew;
- Turnover in fish farming fell as employment growth was not enough to make up for the decline in output per employee; and
- Key sectors decreased from 26% of total turnover in 2000 to 20% in 2005.

4.16.7 GVA

Table 4.119 reports GVA data for Loch Fyne from 2000–2005 by broad industrial group and key sector.

Table 4.119: Loch Fyne GVA change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	%-age change
Agriculture & Fishing	32,093	12.5	44,562	18.5	6.0	48
Energy & Water	32,093	2.6	44,562	3.3	0.7	27
Manufacturing	37,816	8.8	49,590	10.3	1.4	16
Construction	29,010	13.9	40,761	16.6	2.7	19
Distribution; hotels & restaurants	21,680	27.9	29,747	31.9	4.0	14
Transport & Communications	21,680	5.2	29,747	4.4	-0.8	-15
Banking, Finance & Insurance	32,963	6.8	38,547	16.9	10.1	149
Public Administration	32,093	52.0	44,562	104.8	52.9	102
Other Services	21,680	4.9	29,747	8.0	3.2	65
Defence	21,680	0.0	29,747	0.1	0.0	37
Energy	32,093	0.5	44,562	0.2	-0.3	-54
Fish Farming	58,492	10.2	52,347	11.7	1.5	15
Fishing	58,492	10.4	52,347	6.3	-4.1	-40
Marine Construction	29,010	6.3	40,761	12.0	5.7	91
Recreation & Tourism	15,200	11.7	18,200	11.5	-0.2	-2
Shipping & Transport	21,600	1.8	33,900	2.2	0.4	21
Total Key Sectors		40.9		43.9	3.0	7
Total all employees		134.6		214.6	80.1	59

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: GVA data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

The data show that:

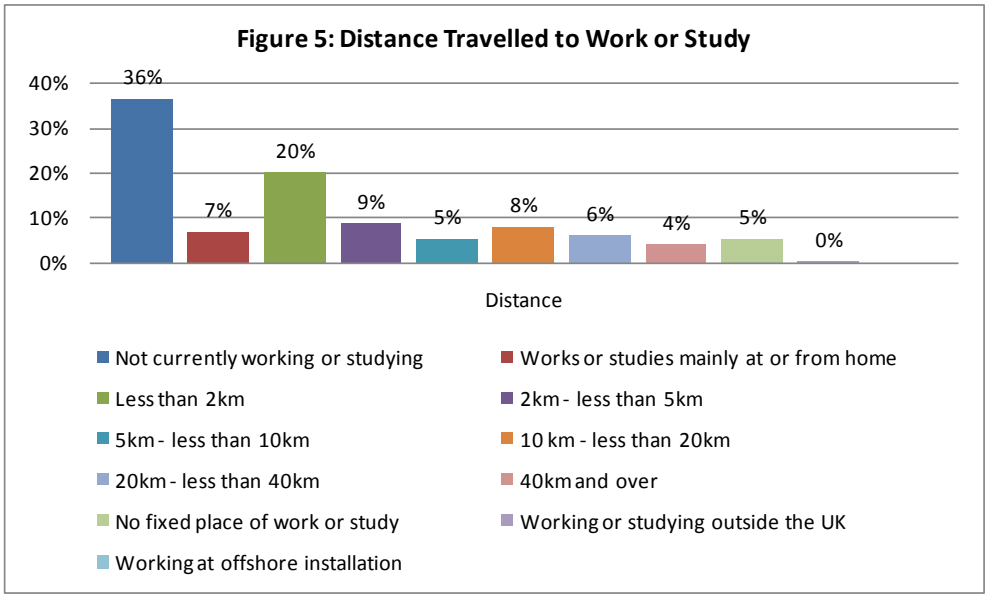
- GVA has increased in some groups that showed a decrease in employment;
- Increases are greater than the %-age changes in employment due to the greater change in GVA/employee;

- Marine construction shows a significant increase in GVA;
- Fish farming shows an increase in GVA as the growth in employment makes up for the fall in GVA per employee; and
- Key sectors have decreased from contributing 30% of Loch Fyne's GVA in 2000 to contributing 20% in 2005.

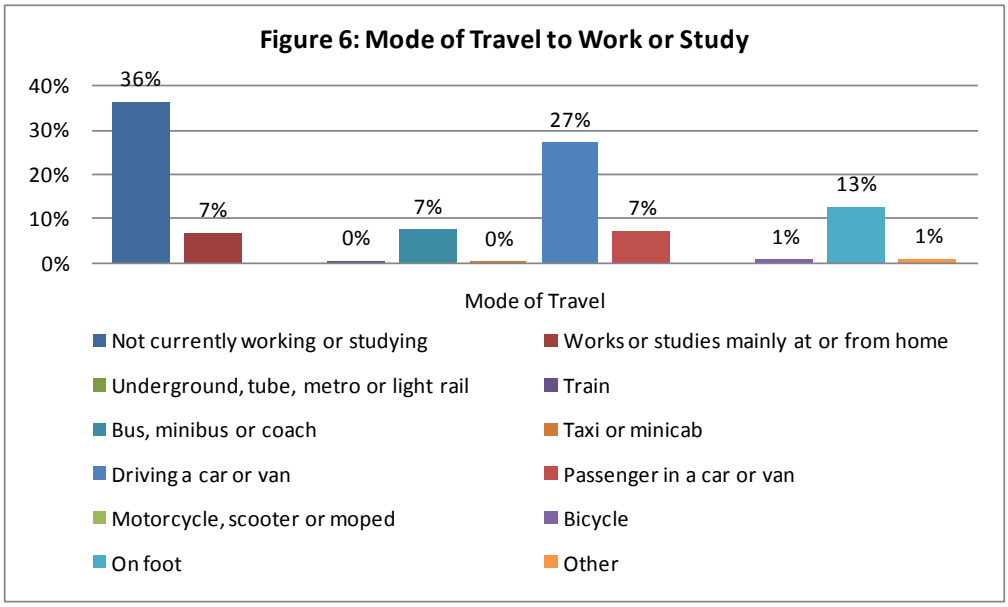
4.16.8 Marine / Port Related Activities

Commuting

Figures 5&6 show the mode and distance reported by those who normally travelled to a place of work or study on Census Day 2001.



Source: 2001 Census



Source: 2001 Census

The Figures show that in 2001:

- 36% of the resident population did not work or study;
- 41% did so at or within 10km of home;
- 10% travelled more than 20km to work or study;
- 34% did so as driver or passenger in a car or van.

Fish Landings

Table 4.120 reports fish landings by volume and value for 2000 and 2006.

Table 4.120: Fish landings on Loch Fyne by Volume and Value 2000 - 06

	Volume (tonnage)	Value (£)
2000	1387.7	2,080,788
2006	1107.7	2,960,512
Change	-280	879,724

Source: Scottish Fisheries Statistics 2006.
Note: Landings are not necessarily made by vessels at their home port or harbour. Loch Fyne includes Carradale, Tarbert and Ardrishaig "creeks", the lowest level of disaggregation for which official statistics are available.

The data shows that:

- Live weight tonnage landed fell by 20%; but
- The value of fish landings grew by 42%

Boating & Sailing

Table 4.121 reports the number of berths and moorings available in Largs and the Firth of Clyde.

Table 4.121: Available Berths and Moorings

	Current		Proposed	
	Loch Fyne	Clyde	Loch Fyne	Clyde
Berths	0	2674	10	5376
Moorings	0	26	0	163
Total	0	2700	10	5539

Source: Clyde Sailing Study

It shows that:

- Loch Fyne currently has no official facilities for touring boats;
- Modest development of this kind is planned.

Tourism

Largs has no attractions ranked among the Top 20 paid or free attractions in Scotland in 2005. However, it does have ranked visitor attractions in the AILLST area:

- Inveraray Castle with 73567 visitors;
- Inveraray Jail with 70849;
- Ardkindlas Woodland Garden with 5275;
- Auchindrain Township Museum with 4831; and
- Glenbarr Abbey with 1937.

Ferry Activity

Table 4.122: reports change in traffic across Loch Fyne.

Table 4.122: Ferry Traffic Loch Fyne Area 2000 - 2005

Loch Fyne	2000	2005	Change	% change
Passengers	333904	391709	57805	17%
Cars	118361	129975	11614	10%
Commercial & buses	12587	16258	3671	30%
Clyde				
Passengers	3013200	3256000	242800	8%
Cars	567800	636700	68900	12%
Commercial & buses	50400	51200	800	2%

Source: Scottish Government Water Transport Statistics 2006

The Table shows that:

- There has been significant growth in ferry traffic across Loch Fyne;
- This growth was more than that for the whole Firth of Clyde;
- In 2005 Loch Fyne ferries accounted for
  - 12% of Clyde passenger traffic
  - 20% of car traffic
  - 32% of commercial vehicle / bus traffic

4.16.9 Change Over Time and Potential Projects

Tarbert was still a fairly active little fishing and yachting port in the late 1970s with a 1-slipway boat-builder, fish salesmen and seafood dept. By the 1980s the herring fishery was dead, but a fish farm had been established by 1988, when locals were still complaining that the historic castle was crumbling. In the early 1990s Calmac started a summer-only ferry between Tarbert and Portavadie, which by 1997 plied all year. Steamer services between Inverary and Gourock continued into the 1960s. The pier continued in use however, visited by inshore fishing and pleasure craft. In 2000 a steel-hulled schooner was moored there as an additional tourist attraction to the Jail and estates. Lochgilphead took over as the county town of Argyll and has remained focused on this administrative role since the 1960s&70s. A fish farming research station was established in 1977.

Improvements to Tarbert harbour have been deleted from the Local Plan, but there are proposals to develop a small number of sailing berths on the Loch.

A subjective view of the changing influence of the marine environment on Loch Fyne is presented in the graph below.

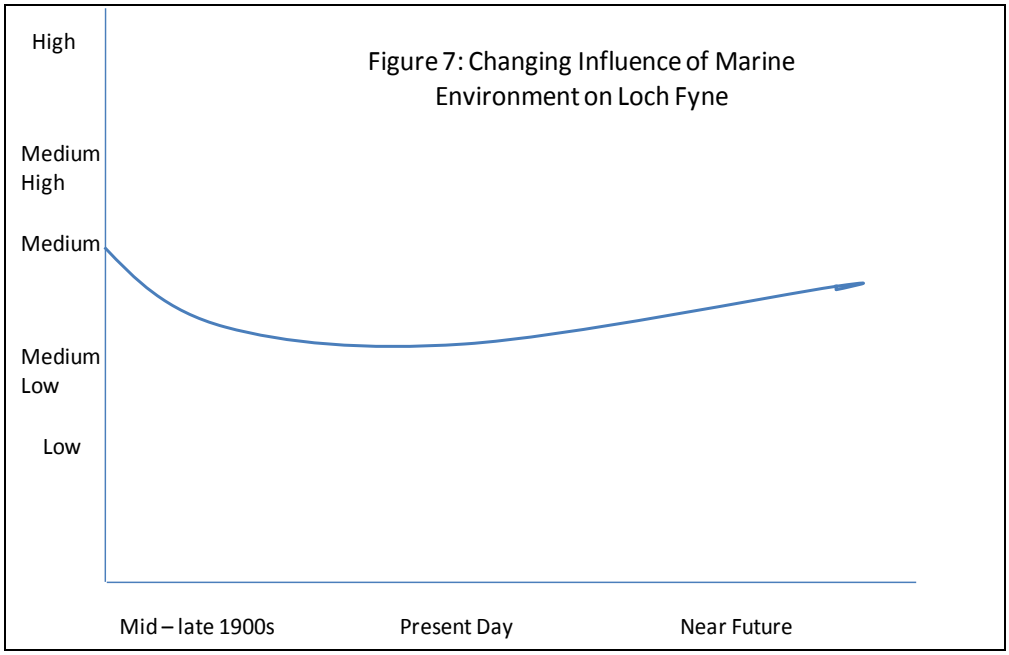


Figure 7: Changing Influence of Marine Environment on Loch Fyne

The graph charts the decline of fishing and loss of steamer traffic, then the modest growth of fish farming and leisure sailing with prospects for further growth in this and other tourism activity in the future.

4.16.10 Conclusions

The main conclusions from this profile are:

- Population decline is more than the regional averages and is counter to the strong growth seen in the outer firth wards;
- The population profile is unusual in showing a decline in children and retired people with an increase in working age population;
- Employment growth is stronger overall than the regional average but key sectors contracted;
- Banking and finance and public administration were the main growth groups;
- Marine construction and fish farming grew of the key sectors. The others all contracted;
- The business base contracted in all areas except the banking and public administration groups which saw the main employment growth;
- Unemployment fell more steeply than the regional average but in absolute terms it was small;
- Turnover and GVA increased but the contribution to the totals from key sectors fell;

- A smaller proportion of residents were shown as neither working nor studying;
- Fish landings fell significantly by volume by grew more significantly by value to almost £3m in 2006;
- There are no recognised facilities for boating and sailing in the area and few are planned;
- There is a large amount of ferry traffic around Loch Fyne. Some of it is seasonal and short haul but it still important to the local economies;
- Fishing / fish farming represent the main economic relationship to the sea

The data analysis for Largs is summarised in the SWOT analysis presented below.

STRENGTHS	WEAKNESSES
Gateway to Kintyre Peninsula Events calendar including food and sailing	Poor access by road. Narrow employment base.
OPPORTUNITIES	**THREATS**
Area wide tourism initiative focusing on food and sailing in particular	Narrow employment base.

4.17 Port Glasgow

4.17.1 Introduction

Port Glasgow is defined by the following 1991 or 2003 Census Area Statistic (CAS) wards:

- 1991 frozen wards
  - 78UP04: Clune Brae;
  - 78UP02: Port Glasgow East;
  - 78UP03: Port Glasgow South;
  - 78UP05: Port Glasgow West.
- 2003 CAS wards
  - 19C02: Ward 2;
  - 19C03: Ward 3;
  - 19C04: Ward 4;
  - 19C05: Ward 5.

4.17.2 Population

Table 4.123 reports the change in population of Port Glasgow from the 1991 Census to 2001 Census.

Table 4.123: Port Glasgow Population by Age Group

	Children		Working Age (59/64)		Retired		All people
2001							
People	3358	20%	10,460	63%	2908	17%	16,726
Males	1754	22%	5234	66%	927	12%	7,915
Females	1604	18%	5226	59%	1981	22%	8,811
1991 People	4,555	23%	11,984	61%	3,053	16%	19,592

Source: 1991 Census, 2001 Census

The Table shows that:

- The population has decreased by 15%;
- The proportion of children has decreased from 23% to 20%;
- The working age population has increased from 61% to 63%; and

- The retired population has increased from 16% to 17%.

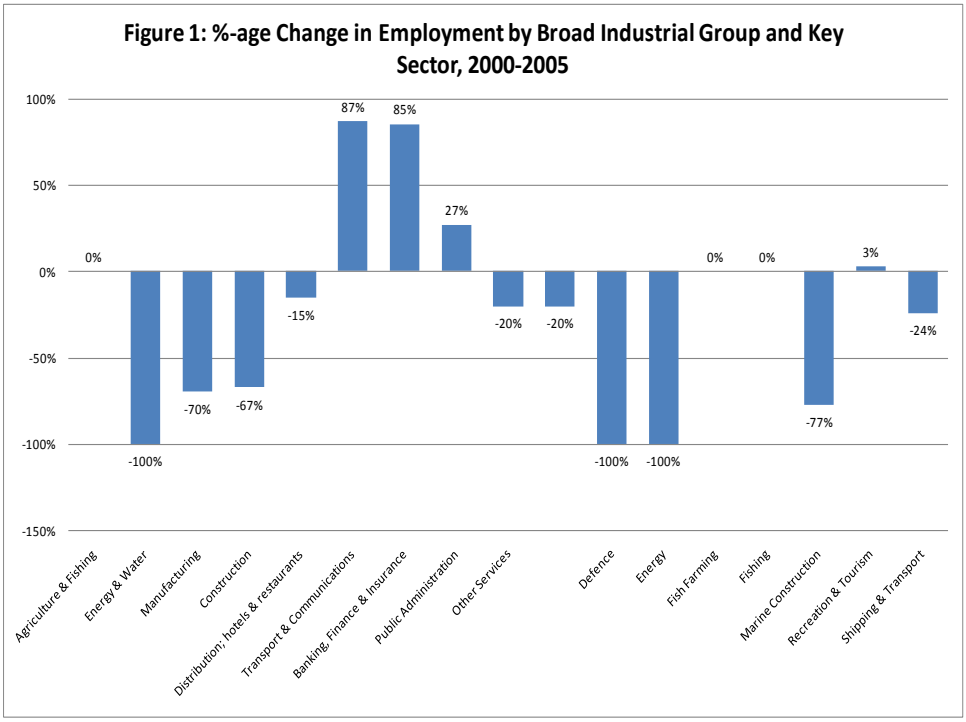
4.17.3 Employment

Table 4.124reports the change in employment in Port Glasgow from 2000–2005 by broad industrial group and by key sector. Figure 1, over, shows the %-age change in employment over this period.

Table 4.124: Port Glasgow Employment change 2000 - 2005

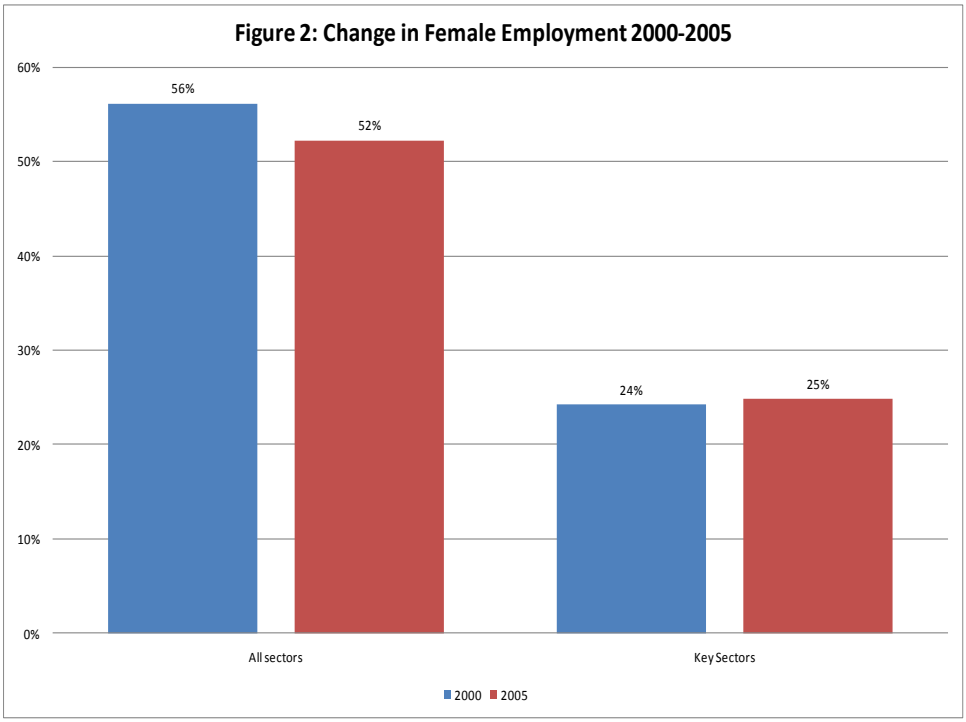
	2000	2005	Change
Agriculture & Fishing	0	0	0
Energy & Water	1	0	-1
Manufacturing	1,451	440	-1,011
Construction	224	73	-151
Distribution; hotels & restaurants	742	629	-113
Transport & Communications	122	228	106
Banking, Finance & Insurance	191	354	163
Public Administration	967	1,228	261
Other Services	206	164	-42
Defence	1	0	-1
Energy	84	0	-84
Fish Farming	0	0	0
Fishing	2	2	0
Marine Construction	182	41	-141
Recreation & Tourism	196	201	5
Shipping & Transport	476	361	-115

- Public administration is now the most important employment group in Port Glasgow with 39% of all employees. In 2000 the largest employment group was manufacturing with 37%;
- Distribution/hotels is next with 20%;
- total employment fell by 20% (788 jobs);
- There was a significant decline in manufacturing employment (down -70%);
- recreation and tourism and shipping and transport out of the key sectors are important employers;
- shipping and transport employment fell by -24%. It is likely that this loss was in the manufacturing elements of this sector as employment in the wider manufacturing group fell while it grew in the transport group; and
- there was a net loss of 36% (336 jobs) from the key sectors.



Source: ABI

Figure 2 reports the change in female employment.



Source: ABI

It shows that:

- females still make up a majority of Port Glasgow's employees in all sectors but a smaller one;
- females have suffered from overall employment decline more than males; and
- in key sectors the proportion of females in employment has increased by 1%.

4.17.4 Workplaces / Business Base

Table 4.125reports the change in the workplace / business[41] base in Port Glasgow from 2000 – 2005. Figure 3 shows the %-age change in this base.

Table 4.125: Port Glasgow Business Base change 2000 - 2005

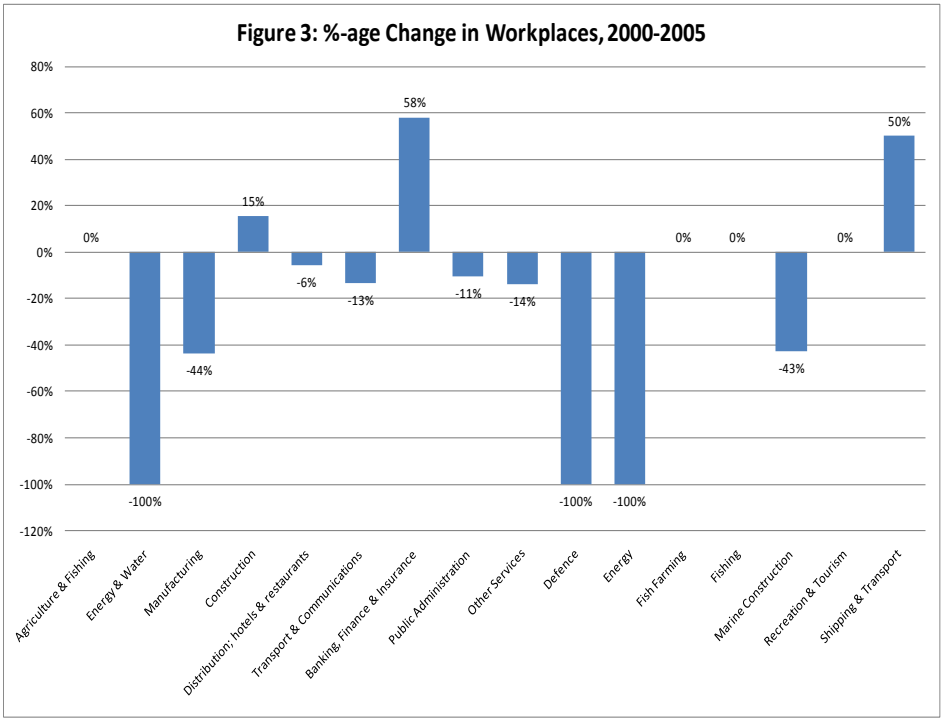
	2000	2005	Change
Agriculture & Fishing	0	0	0
Energy & Water	1	0	-1
Manufacturing	32	18	-14
Construction	13	15	2
Distribution; hotels & restaurants	101	95	-6
Transport & Communications	15	13	-2
Banking, Finance & Insurance	31	49	18
Public Administration	56	50	-6
Other Services	29	25	-4
Defence	1	0	-1
Energy	1	0	-1
Fish Farming	0	0	0
Fishing	1	1	0
Marine Construction	7	4	-3
Recreation & Tourism	28	28	0
Shipping & Transport	4	6	2

Source: ABI

The Table data show:

- Distribution / hotels is still the largest business grouping (36%);
- Public admin is next with 19%;
- The business base decreased by 13 units (5%);
- Shipping and transport is the only key sector which shows any growth; and
- Only recreation and tourism is significant of the key sectors.

[41] ABI workplaces are widely accepted as a proxy for the business base.


Figure 3: %-age Change in Workplaces, 2000-2005
80%
60%
40%
20%
0%
-20%
-40%
-60%
-80%
-100%
-120%
0%
-100%
-44%
15%
-6%
-13%
58%
-11%
-14%
-100%
-100%
0%
0%
-43%
0%
50%
Agriculture & Fishing
Energy & Water
Manufacturing
Construction
Distribution, hotels & restaurants
Transport & Communications
Banking, Finance & Insurance
Public Administration
Other Services
Defence
Energy
Fish Farming
Fishing
Marine Construction
Recreation & Tourism
Shipping & Transport

Source: ABI

4.17.5 Unemployment

Table 4.126 reports the absolute change in claimant count in Port Glasgow from September 2004–2007. Figure 4 shows the change in unemployment rates over the same period.

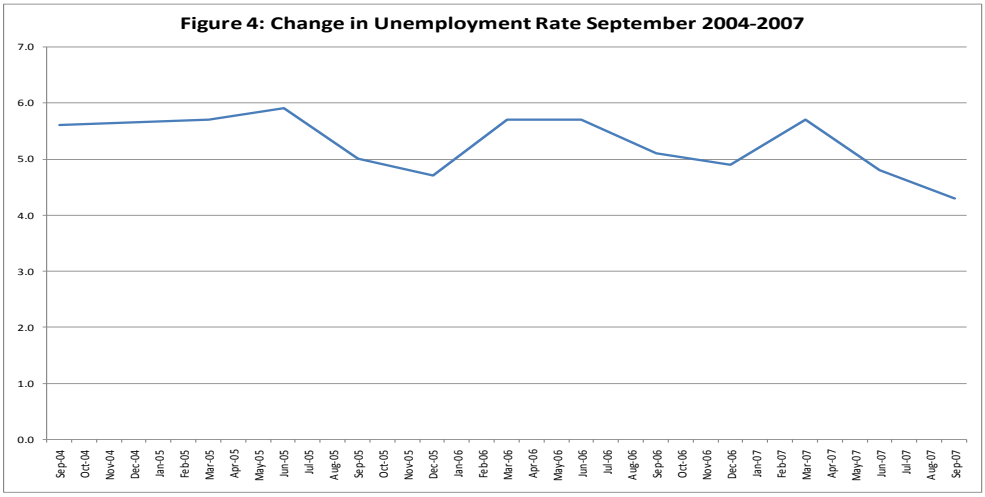
Table 4.126: Absolute Change in Unemployment September 2004 - 2007

2004	587
2005	524
2006	538
2007	447
Change	-140
% Change	-24%

Source: Claimant Count

The data show that:

- Unemployment has fallen by nearly a quarter in three years;
- The absolute change is large.



Source: Claimant Count

4.17.6 Turnover

Table 4.127 reports turnover change by broad industrial group and key sector in Port Glasgow from 2000–2005.

Table 4.127: Port Glasgow Turnover change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	%-age Change
Agriculture & Fishing	90,999	0.0	111,026	0.0	0.0	-
Energy & Water	90,999	0.1	111,026	0.0	-0.1	-100
Manufacturing	137,310	199.2	149,693	65.9	-133.4	-67
Construction	73,596	16.5	103,312	7.5	-8.9	-54
Distribution; hotels & restaurants	65,696	48.7	81,676	51.4	2.6	5
Transport & Communications	65,696	8.0	81,676	18.6	10.6	132
Banking, Finance & Insurance	55,091	10.5	93,359	33.0	22.5	214
Public Administration	90,999	88.0	111,026	136.3	48.3	55
Other Services	65,696	13.5	81,676	13.4	-0.1	-1
Defence	65696	0.1	81676	0.0	-0.1	-100
Energy	90999	7.6	111026	0.0	-7.6	-100
Fish Farming	146612	0.0	106659	0.0	0.0	-
Fishing	146612	0.3	106659	0.2	-0.1	-27
Marine Construction	73,596	13.4	103312	4.2	-9.2	-68
Recreation & Tourism	35,900	7.0	56900	11.4	4.4	63
Shipping & Transport	50800	24.2	96200	34.7	10.5	44
Total Key Sectors		52.6		50.6	-2.0	-4
Total all employees		384.6		326.2	-58.4	-15

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: Turnover data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

The Table shows:

- Total turnover and key sector turnover declined over the period;
- changes are generally greater than the %-age change in employment due to changes in turnover / employee;
- Recreation/tourism and shipping/transport, despite the decline in employment, are the only key sectors which show increases in turnover; and

- Key sectors increased from 14% of total turnover in 2000 to 16% in 2005.

4.17.7 GVA

Table 4.128 reports GVA data for Port Glasgow from 2000–2005 by broad industrial group and key sector.

Table 4.128: Port Glasgow GVA change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	%-age change
Agriculture & Fishing	32,093	0.0	44,562	0.0	0.0	-
Energy & Water	32,093	0.0	44,562	0.0	0.0	-100
Manufacturing	37,816	54.9	49,590	21.8	-33.1	-60
Construction	29,010	6.5	40,761	3.0	-3.5	-54
Distribution; hotels & restaurants	21,680	16.1	29,747	18.7	2.6	16
Transport & Communications	21,680	2.6	29,747	6.8	4.1	156
Banking, Finance & Insurance	32,963	6.3	38,547	13.6	7.3	117
Public Administration	32,093	31.0	44,562	54.7	23.7	76
Other Services	21,680	4.5	29,747	4.9	0.4	9
Defence	21,680	0.0	29,747	0.0	0.0	-100
Energy	32,093	2.7	44,562	0.0	-2.7	-100
Fish Farming	58,492	0.0	52,347	0.0	0.0	-
Fishing	58,492	0.1	52,347	0.1	0.0	-11
Marine Construction	29,010	5.3	40,761	1.7	-3.6	-68
Recreation & Tourism	15,200	3.0	18,200	3.7	0.7	23
Shipping & Transport	21,600	10.3	33,900	12.2	2.0	19
Total Key Sectors		21.4		17.7	-3.7	-17
Total all employees		121.9		123.5	1.6	1

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: GVA data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

The data show that:

- GVA has increased in some groups that showed a decrease in employment;
- Increases are greater than the %-age changes in employment due to the greater change in GVA/employee;
- Transport and communications shows a significant increase in GVA; and

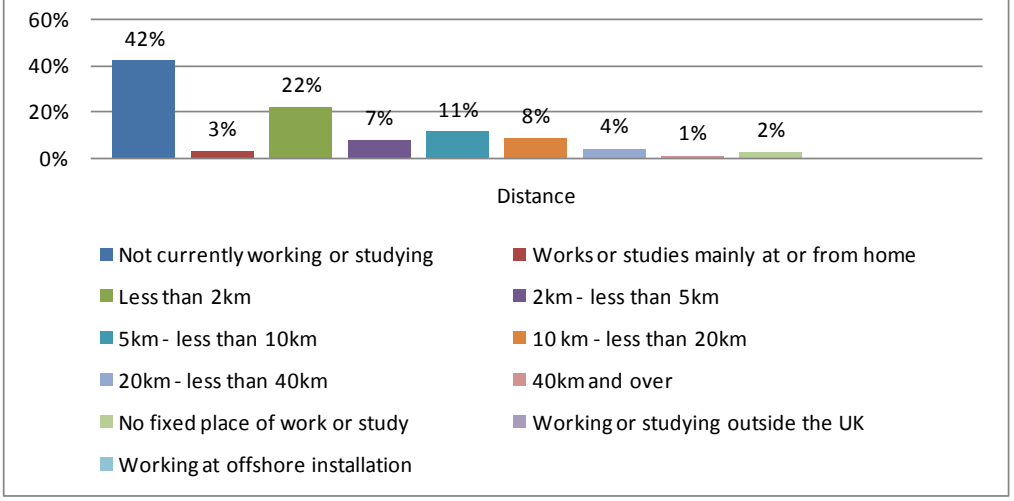
– Key sectors GVA fell and decreased from contributing 18% of Port Glasgow's GVA in 2000 to contributing 14% in 2005.

4.17.8 Marine / Port Related Activities

Commuting

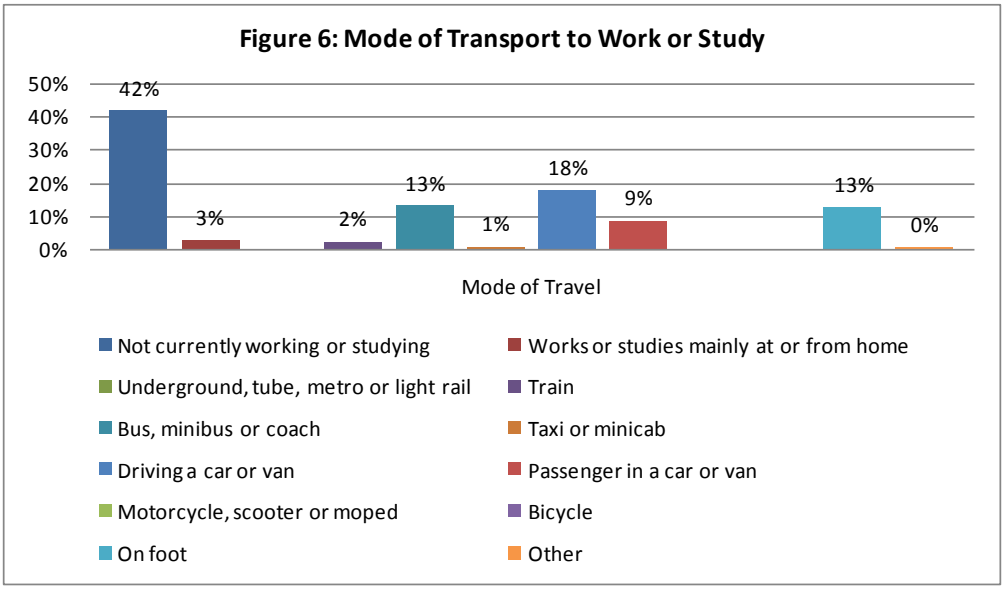
Figures 5&6 show the mode and distance reported by those who normally travelled to a place of work or study on Census Day 2001.

Figure 5: Distance Travelled to Work or Study



Source: 2001 Census

Figure 6: Mode of Transport to Work or Study



Source: 2001 Census

The Figures show that in 2001:

- 42% of the population did not work or study;
- 43% did so from within 10km of home;
- 5% travelled more than 20km to work;
- 28% travelled as diver or passenger in a car, taxi or van.

Fish Landings

There are no recorded fish landings at Port Glasgow.

Boating & Sailing

There are no boating or sailing berths in Port Glasgow and none are planned.

Tourism

Port Glasgow has no attractions ranked among the Top 20 paid or free attractions in Scotland in 2005, nor any ranked among the most visited attractions in the Greater Glasgow and Clyde Valley area.

Ferry Activity

There are no major ferry services to / from Port Glasgow.

4.17.9 Change Over Time and Potential Projects

Port Glasgow has historically been a town famous for its shipbuilding. In the 1970's Lamont's Castle shipyard built a series of 'Island' class ferries for Calmac before closing in 1979. Meantime the Ferguson yard was nationalised in 1977. By 1992 Ferguson had resumed production, speedily building ferries for Calmac's Ullapool, Skye and Stornoway services. In 1995-96 Ferguson built a Shell North Sea supply vessel and were still busy in 2000 when they launched the 90-car ferry MV Hebrides. Employment in the yards fluctuated but was generally followed a downward trend. However new industries such as electronics and textiles expanded in the 1990s as older, established industries closed.

Port Glasgow, along with Greenock and Gourock is part of the River Clyde Waterfront Regeneration plan. This involves significant Town Centre redevelopment including realignment of A8 to access the coast. It is also subject to Housing and Community Renewal Area designation

A subjective view of the changing influence of the marine environment on Port Glasgow is presented in the graph below.

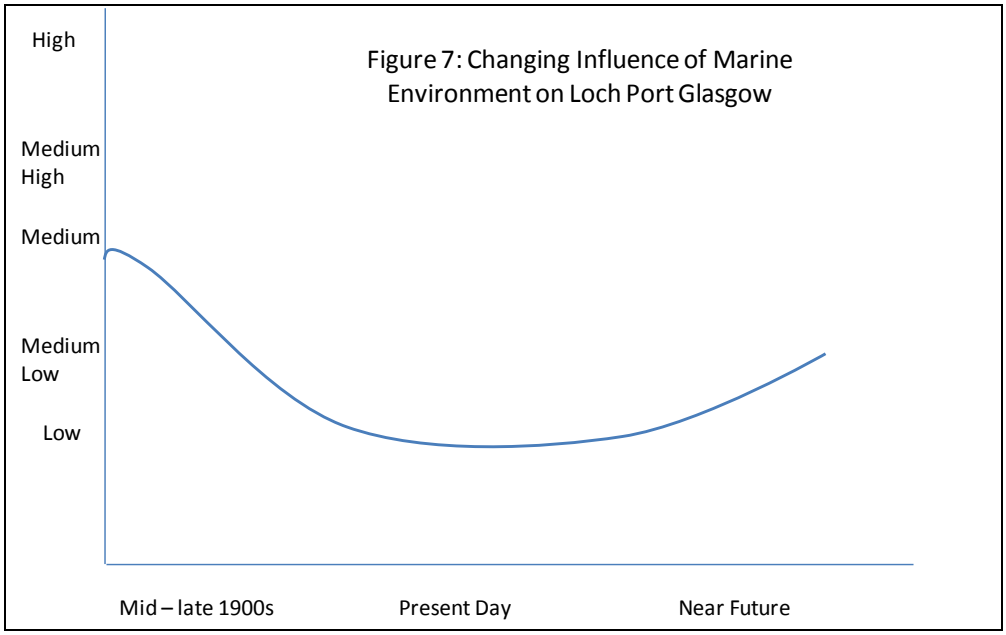


Figure 7: Changing Influence of Marine Environment on Loch Port Glasgow

The graph charts the decline of the ship yards and their future redevelopment under the Clyde Waterfront Regeneration Plan.

4.17.10 Conclusions

The main conclusions from this profile are:

- Population decline is counter to the Strathclyde and Firth of Clyde averages and opposite the trend of the outer firth wards;
- The population profile is ageing – fewer children and more old people;
- Employment decline is severe and counter to regional trends of modest growth;
- Manufacturing decline is the main reason for this change;
- Key sector employment declined by more than a third with losses recorded in energy, marine construction and shipping;
- The business decline was much less (5%) with some growth in the banking and finance group and shipping;
- Unemployment fell by more than the regional average;
- Total turnover fell but total GVA rose;
- Most people work locally;
- Port Glasgow does not have a significant tourism offer;

- The economic importance of the settlement's maritime connections has lessened.

The data analysis for Largs is summarised in the SWOT analysis presented below.

STRENGTHS	WEAKNESSES
River Clyde (regeneration focus) Natural environment Range of activities already in place Integration with Greenock / Gourock regeneration Access to Glasgow	Current housing offer Few tourist attractions (no iconic Visitor attraction) Town centre offering (with no access to waterfront)
OPPORTUNITIES	**THREATS**
Redevelopment of waterfront – housing, commercial, leisure Connecting town centre with waterfront Rise in property prices in Glasgow	Waterfront not completed Demographics = declining population, reduced workforce Ongoing social deprivation

4.18 Troon

4.18.1 Introduction

Troon is defined by the following 1991 or 2003 Census Area Statistic (CAS) wards:

- 1991 frozen wards
  - 78UR18: Troon East;
  - 78UR17: Troon North and Central;
  - 78UR16: Troon South and West.
- 2003 CAS wards
  - 28C03: Troon East;
  - 28C01: Troon North;
  - 28C04: Troon South;
  - 28C02: Troon West.

4.18.2 Population

Table 4.129 reports the change in population of Troon from the 1991 Census to 2001 Census.

Table 4.129: Troon Population by Age Group

	Children		Working Age (59/64)		Retired		All people
2001							
People	2800	18%	9187	61%	3181	21%	15,168
Males	1421	20%	4708	65%	1100	15%	7,229
Females	1379	17%	4479	56%	2081	26%	7939
1991 People	3,167	21%	8,954	59%	3,029	20%	15,150

Source: 1991 Census, 2001 Census

The Table shows that:

- The population has increased by 0.1%;
- The proportion of children has decreased slightly from 21% to 18%;
- The working age population has increased from 59% to 61%; and

- The retired population has increased from 20% to 21%.

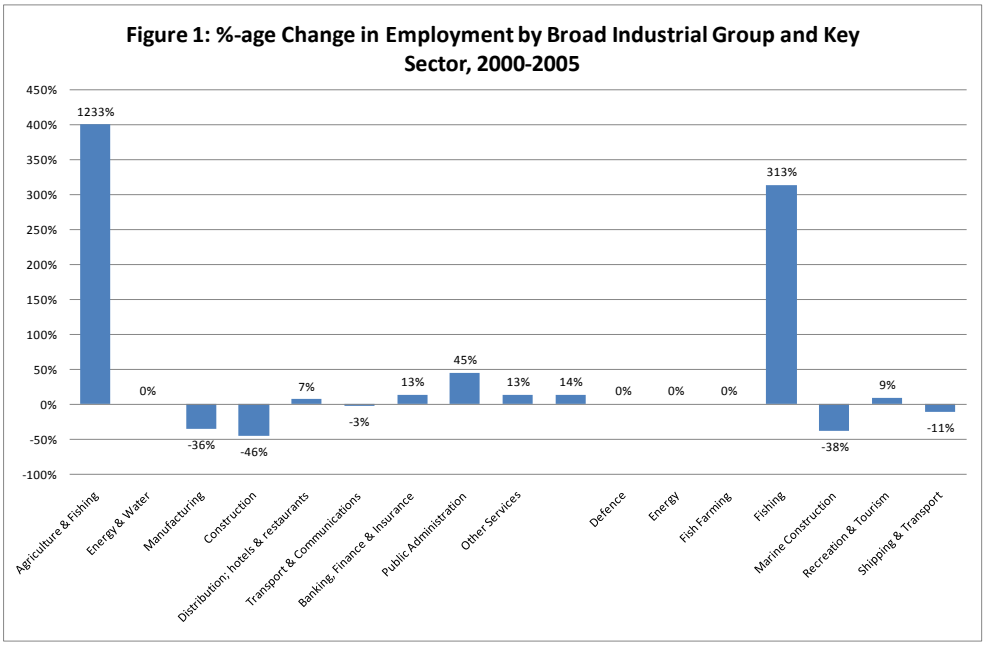
4.18.3 Employment

Table 4.130 reports the change in employment in Troon from 2000–2005 by broad industrial group and by key sector. Figure 1, over, shows the %-age change in employment over this period.

Table 4.130: Troon Employment change 2000 - 2005

	2000	2005	Change
Agriculture & Fishing	3	40	37
Energy & Water	0	0	0
Manufacturing	88	56	-32
Construction	179	97	-82
Distribution; hotels & restaurants	1,195	1,276	81
Transport & Communications	120	116	-4
Banking, Finance & Insurance	264	299	35
Public Administration	694	1,003	309
Other Services	225	255	30
Defence	0	43	43
Energy	0	0	0
Fish Farming	0	0	0
Fishing	15	62	47
Marine Construction	47	29	-18
Recreation & Tourism	691	752	61
Shipping & Transport	9	8	-1

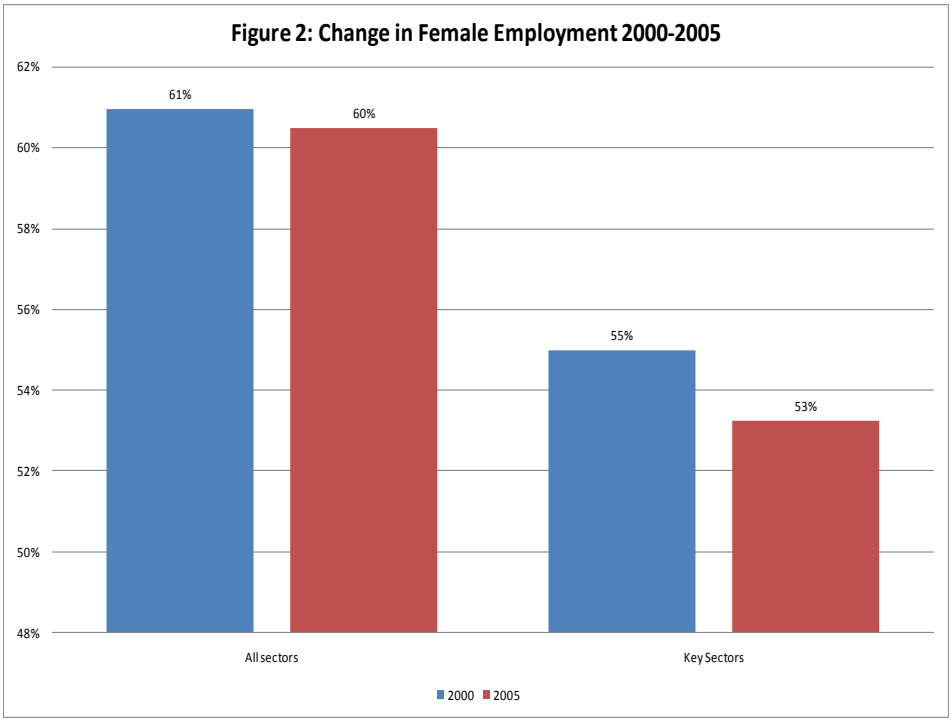
- Distribution/hotels remains the most important employment group in Troon with 41% of all employees;
- Public admin is next with 32%;
- total employment rose by 14% (374 jobs);
- there was a significant increase in public admin employment;
- only recreation and tourism of the key sectors is an important employer; and
- there was a net increase of 17% (132 jobs) from the key sectors.



Source: ABI

Note: The % change shown on the vertical axis is not the real extent of change in Agriculture & Fishing. The data label above the column show the true value of the change.

Figure 2 reports the change in female employment.



Source: ABI

It shows that:

- females still make up a large majority of Troon's employees;
- females have not benefitted from overall employment growth as much males; and
- in key sectors the proportion of females in employment has decreased by 2%.

4.18.4 Workplaces / Business Base

Table 4.131 reports the change in the workplace / business[42] base in Troon from 2000 – 2005. Figure 3 shows the %-age change in this base.

Table 4.131: Troon Business Base change 2000 - 2005

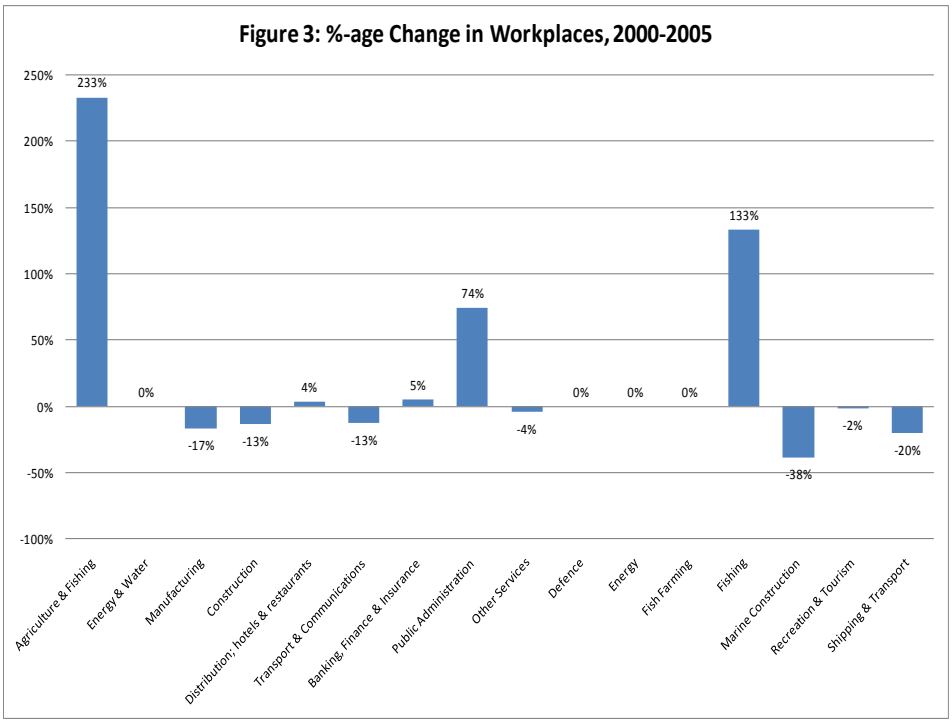
	2000	2005	Change
Agriculture & Fishing	3	10	7
Energy & Water	0	0	0
Manufacturing	30	25	-5
Construction	38	33	-5
Distribution; hotels & restaurants	165	171	6
Transport & Communications	16	14	-2
Banking, Finance & Insurance	93	98	5
Public Administration	35	61	26
Other Services	48	46	-2
Defence	0	1	1
Energy	0	0	0
Fish Farming	0	0	0
Fishing	6	14	8
Marine Construction	13	8	-5
Recreation & Tourism	63	62	-1
Shipping & Transport	5	4	-1

Source: ABI

The Table data show:

- Distribution / hotels is still the largest business grouping (37%);
- Banking/finance is next with 21%;
- The business base increased by 30 units (7%);
- Defence and fishing are the only key sectors which show any growth; and
- Only recreation and tourism is significant of the key sectors.

[42] ABI workplaces are widely accepted as a proxy for the business base.


Figure 3: %-age Change in Workplaces, 2000-2005
250%
200%
150%
100%
50%
0%
-50%
-100%
233%
0%
-17%
-13%
4%
-13%
5%
74%
-4%
0%
0%
0%
133%
-38%
-2%
-20%
Agriculture & Fishing
Energy & Water
Manufacturing
Construction
Distribution; hotels & restaurants
Transport & Communications
Banking, Finance & Insurance
Public Administration
Other Services
Defence
Energy
Fish Farming
Fishing
Marine Construction
Recreation & Tourism
Shipping & Transport

Source: ABI

4.18.5 Unemployment

Table 1.132 reports the absolute change in claimant count in Troon from September 2004–2007. Figure 4 shows the change in unemployment rates over the same period.

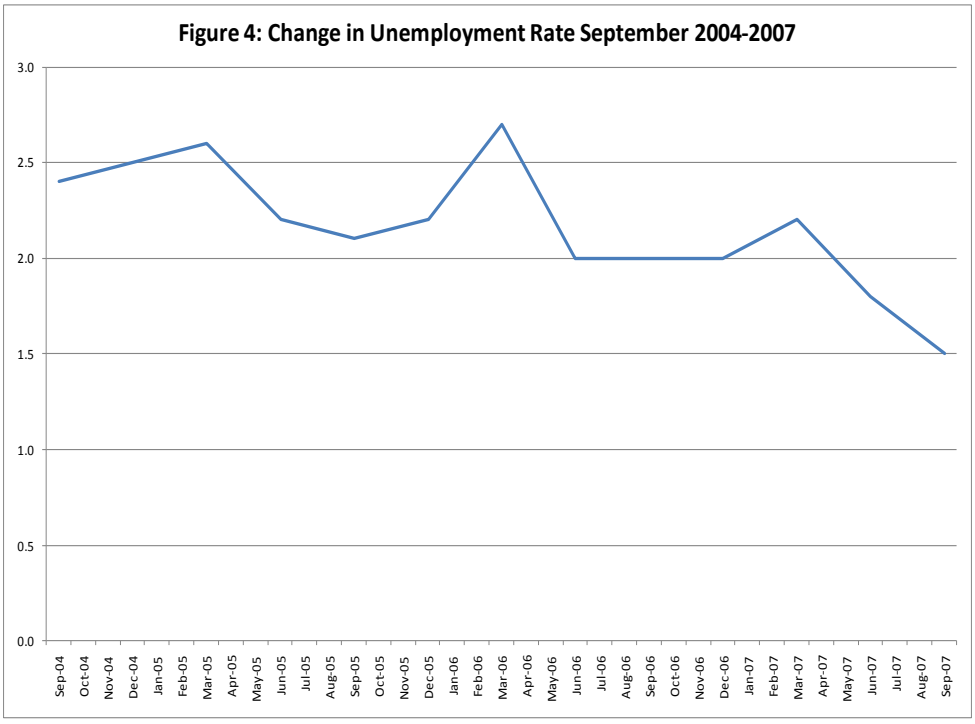
Table 1.132: Absolute Change in Unemployment September 2004 - 2007

2004	225
2005	195
2006	186
2007	142
Change	-83
% Change	-37%

Source: Claimant Count

The data show that:

- Unemployment has fallen by more than a third in three years;
- The absolute change is relatively large.



Source: Claimant Count

4.18.6 Turnover

Table 1.133 reports turnover change by broad industrial group and key sector in Troon from 2000–2005.

Table 1.133: Troon Turnover change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	%-age Change
Agriculture & Fishing	90,999	0.3	111,026	4.4	4.2	1527
Energy & Water	90,999	0.0	111,026	0.0	0.0	-
Manufacturing	137,310	12.1	149,693	8.4	-3.7	-31
Construction	73,596	13.2	103,312	10.0	-3.2	-24
Distribution; hotels & restaurants	65,696	78.5	81,676	104.2	25.7	33
Transport & Communications	65,696	7.9	81,676	9.5	1.6	20
Banking, Finance & Insurance	55,091	14.5	93,359	27.9	13.4	92
Public Administration	90,999	63.2	111,026	111.4	48.2	76
Other Services	65,696	14.8	81,676	20.8	6.0	41
Defence	65696	0.0	81676	3.5	3.5	-
Energy	90999	0.0	111026	0.0	0.0	-
Fish Farming	146612	0.0	106659	0.0	0.0	-
Fishing	146612	2.2	106659	6.6	4.4	201
Marine Construction	73,596	3.5	103312	3.0	-0.5	-13
Recreation & Tourism	35,900	24.8	56900	42.8	18.0	72
Shipping & Transport	50800	0.5	96200	0.8	0.3	68
Total Key Sectors		30.9		56.7	25.8	83
Total all employees		204.4		296.6	92.2	45

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: GVA data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

The Table shows:

- Increases in turnover in the same groups reporting increases in employment;
- Increases are generally greater than the %-age change in employment due to changes in turnover / employee;
- Fishing is the key sector which shows the greatest increase in turnover; and

- Key sectors increased from 15% of total turnover in 2000 to 19% in 2005.

4.18.7 GVA

Table 1.133 reports GVA data for Troon from 2000–2005 by broad industrial group and key sector.

Table 1.133: Troon GVA change 2000 - 2005

	Per employee	2000 (£m)	Per employee	2005 (£m)	Change	%-age change
Agriculture & Fishing	32,093	0.1	44,562	1.8	1.7	1751
Energy & Water	32,093	0.0	44,562	0.0	0.0	-
Manufacturing	37,816	3.3	49,590	2.8	-0.6	-17
Construction	29,010	5.2	40,761	4.0	-1.2	-24
Distribution; hotels & restaurants	21,680	25.9	29,747	38.0	12.0	47
Transport & Communications	21,680	2.6	29,747	3.5	0.8	33
Banking, Finance & Insurance	32,963	8.7	38,547	11.5	2.8	32
Public Administration	32,093	22.3	44,562	44.7	22.4	101
Other Services	21,680	4.9	29,747	7.6	2.7	56
Defence	21,680	0.0	29,747	1.3	1.3	-
Energy	32,093	0.0	44,562	0.0	0.0	-
Fish Farming	58,492	0.0	52,347	0.0	0.0	-
Fishing	58,492	0.9	52,347	3.2	2.4	270
Marine Construction	29,010	1.4	40,761	1.2	-0.2	-13
Recreation & Tourism	15,200	10.5	18,200	13.7	3.2	30
Shipping & Transport	21,600	0.2	33,900	0.3	0.1	40
Total Key Sectors		12.9		19.7	6.7	52
Total all employees		73.0		113.7	40.7	56

Source: http://www.scotland.gov.uk/Topics/Statistics/16170/ScotSec04
Note: GVA data for Banking, finance & insurance and public administration is not available. Data for Real Estate Activities (a subset of the banking, finance and insurance group) and the economy average have been used instead. An all economy average has also been used for the Agriculture & Fishing and Energy groups too. Figures should be seen as indicative rather than absolute due to the level of geographic and sectoral disaggregation involved.

The data show that:

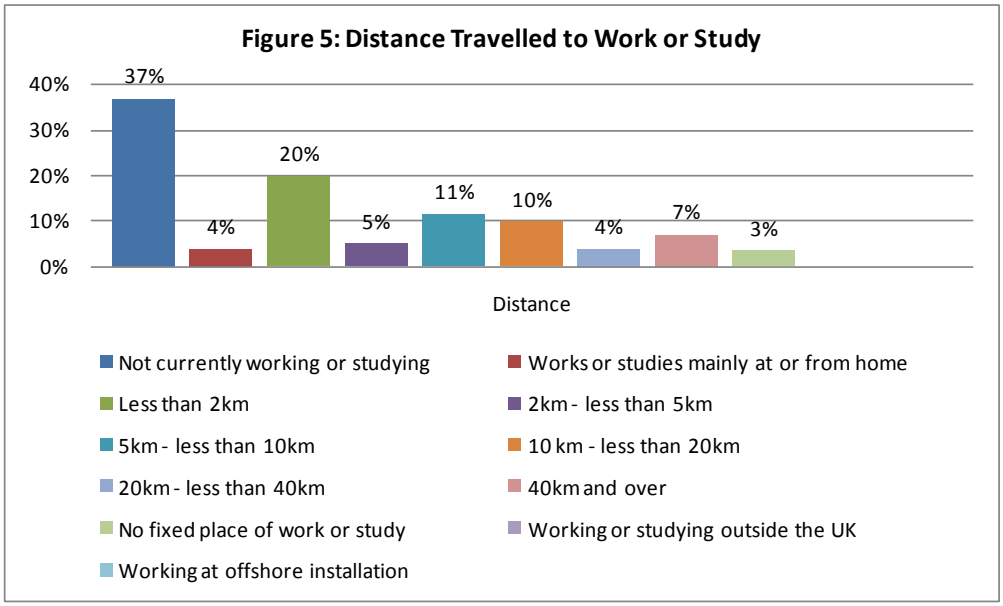
- GVA has increased in the same groups that showed an increase in employment;
- Increases are greater than the %-age changes in employment due to the greater change in GVA/employee;

- Agriculture/fishing shows a significant increase in GVA; and
- Key sectors have decreased from contributing 18% of Troon's GVA in 2000 to contributing 17% in 2005.

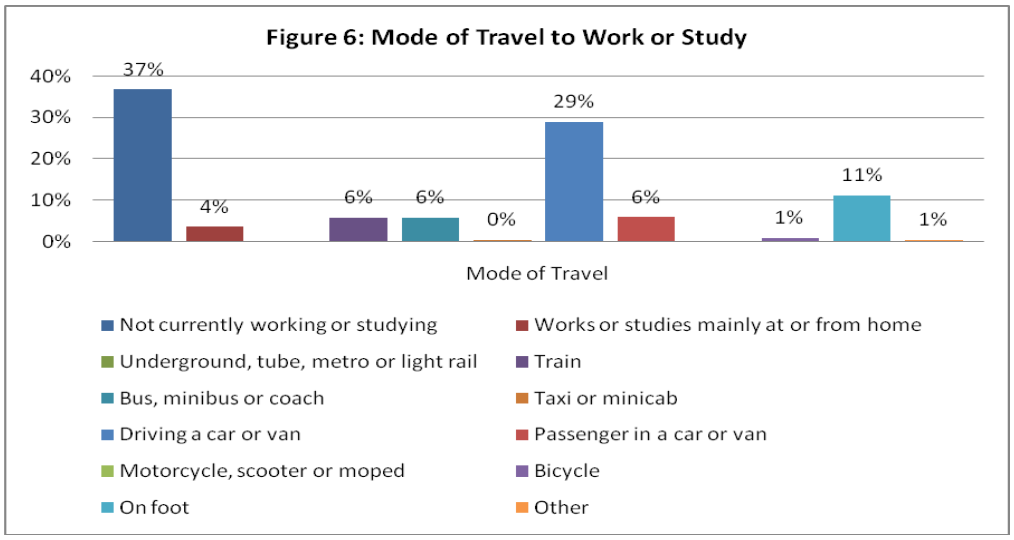
4.18.8 Marine / Port Related Activities

Commuting

Figures 5&6 show the mode and distance reported by those who normally travelled to a place of work or study on Census Day 2001.



Source: 2001 Census



Source 2001 Census

The Figures show that in 2001:

- 37% of the population did not work or study;
- 40% did so from within 10km of home;
- 11% travelled more than 20km to work;
- 35% travelled as diver or passenger in a car, taxi or van.

Fish Landings

Table 1.134 reports fish landings by volume and value for 2000 and 2006.

Table 1.134: Fish landings on Troon & Saltcoats by Volume and Value 2000 - 06

	Volume (tonnage)	Value (£)
2000	2436.7	2,956,000
2006	2310.2	4,140,629
Change	-126.5	1,184,629

Source: Scottish Fisheries Statistics 2006.
Note: Landings are not necessarily made by vessels at their home port or harbour. Troon and Saltcoats are considered as one "creek", the lowest level of disaggregation for which official statistics are available.

The data shows that:

- Live weight tonnage landed fell by 5%; but
- The value of fish landings grew by 40%

Boating & Sailing

Table 1.135 reports the number of berths and moorings available in Troon and the Firth of Clyde.

Table 1.135: Available Berths and Moorings

	Current		Proposed	
	Troon	Clyde	Troon	Clyde
Berths	330	2674	0	5376
Moorings	0	26	0	163
Total	330	2700	0	5539

Source: Clyde Sailing Study

It shows that:

- Troon currently has 12% of the area's berths for touring boats;
- No further development of this kind is planned.

Tourism

Troon is on the doorstep of several Championship and municipal golf courses but has no attractions ranked among the Top 20 paid or free attractions in Scotland in 2005. Nor does it have any ranked visitor attractions in the Ayrshire area.

Ferry Activity

Data on ferry movements between Troon and Northern Ireland were not available at time of writing.

4.18.9 Change Over Time and Potential Projects

Troon is typically a tourist and residential town with a port and ferry facilities. In the 1950&60s the Ailsa shipyard and the West of Scotland Shipbreaking Company prospered building ferries and scrapping obsolete warships. The Ailsa shipyard became known as Ferguson-Aisla in 1981, but ceased to produce vessels for a time and changed hands, becoming Ailsa Perth. Ailsa then built motor yachts and cabin cruisers but met difficulties when completing an Orkney ferry. The yard was twice taken over and finally closed as a shipbuilder in 2003.

Much of the outer harbour was derelict and the rail connection removed by 1985 although the inner harbour remained as a congested marina and cruising club base. Yachting's popularity in Troon continued to grow through the 1990s and the local beach won accolades from the Tidy Britain Group. Timber barges began calling in 1994 with loads for the Caledonian Mill in Irvine and in 2000 the Sea-Cat high speed service to Belfast started up. Links golf has been an important part of the tourist offer since the Open Championship returned to Royal Troon in 1997.

Alongside Ayr and Prestwick in the Local Plan, Troon is identified as a main centre in South Ayrshire for major residential, economic, commercial educational and community development. The local plan favours continued development of sea port facilities in Troon, and for retail and leisure investment opportunities to be guided to existing town centres such as Troon. The Ayrshire Joint Structure Plan identifies opportunity for further regeneration of the harbour area but no new berths are proposed.

A subjective view of the changing influence of the marine environment on Troon is presented in the graph below.

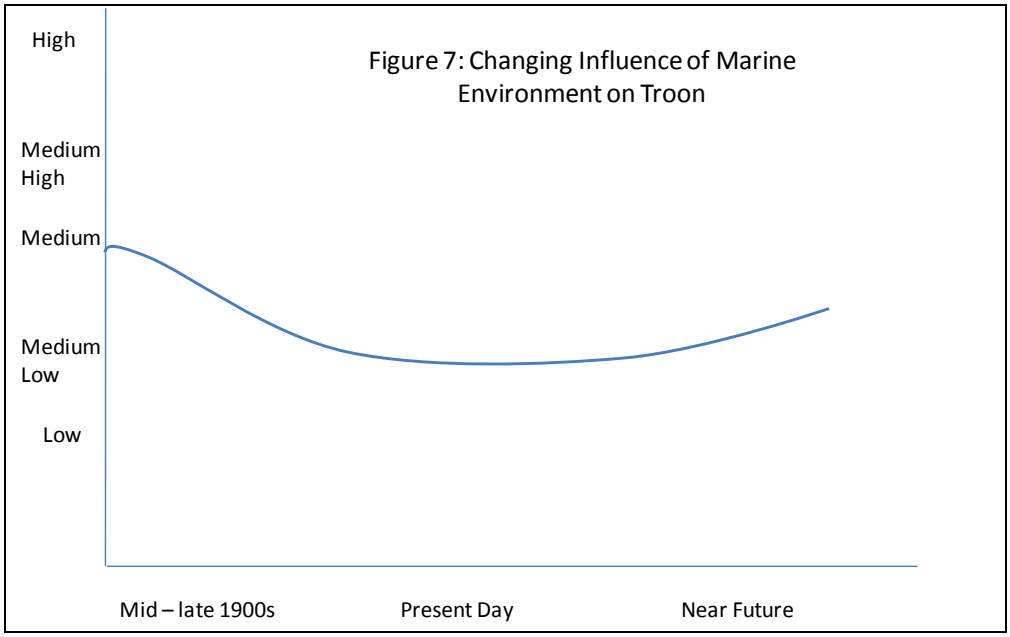


Figure 7: Changing Influence of Marine Environment on Troon

The graph charts the decline of the ship yards and harbour in the 1970&80s the continuing use of the harbour as a fishing, commercial and cruising port with the potential for further development in this area.

4.18.10 Conclusions

The main conclusions from this profile are:

- Stable population is in line with regional and Firth of Clyde averages but against the trend found in the outer firth wards;
- Population profile is ageing – fewer children and more retired people;
- Employment growth is higher than the regional average overall and for key sectors;
- The business base increased too;
- Unemployment fell more than the regional average;
- Turnover and GVA overall grew overall and for key sectors;
- Key sectors contributed more to total turnover but their share of GVA fell as some growth occurred in sectors where GVA per employee fell;
- Much of the population worked locally;
- Troon is an important centre for sailing activity on the Clyde;
- Growth in the fishing sector and the marina activity are Troon's main economic link with the sea.

The data analysis for Troon is summarised in the SWOT analysis presented below.

STRENGTHS	WEAKNESSES
Established golf and sailing resort. Developing site for other water-based activities such as kite surfing and windsurfing. Ferry link to Northern Ireland Proximity to GPIA and good road/rail connections to West of Scotland.	Modest town centre, lacking popular attractions beside golf and sailing. Reliance on hospitality sector for employment
OPPORTUNITIES	**THREATS**
Further regeneration of harbour area. Improved town centre amenities attract and retain tourists	Declining town centre amenities

APPENDIX 1

Influence Matrices

This Appendix presents an estimation of the degree to which each of the 17 locations described ain the report main body is *currently* influenced by the marine environment.

Each matrix lists the 17 locations down the side and the factors against which they are scored across the top. These are:

- The 7 Key Industries identified in the report
  - energy
  - fish farming
  - fishing
  - construction
  - defence
  - tourism and recreation
  - shipping and transport.;
- Turnover and GVA (of the Key Industries); and
- Other Factors (matrix 1 only)
  - Fish landings
  - Boating & sailing activity
  - Ferry activity
  - Tourism
  - Whether an island

Scoring of the key Industries (and turnover / GVA) is based on employment share as reported in Chapter 4, above. The exception to this is Largs where Defence employment is believed to refer to the facility at Beith rather than to any activity in or around the town of Largs itself.

Other Factors give consideration to the importance of Marine / Port Related Activities reported for each location. Again these are in relation to each location as defined by 2003 CAS wards. The exception is Helensburgh, where a significant proportion of residents work at the Clyde Submarine Base in nearby Faslane.

The first matrix gives an absolute score to each location against each criterion. The second ranks the relative position of each location against the others. No weighting is applied to any score and the final total is a simple aggregate across each factor considered. However, for each matrix, it is the influence of the marine environment on employment that is the most important determining factor.

Matrix 1: Absolute Influence											
	Energy	Fish Farming	Fishing	Construction Related	Defence	Tourism & Recreation	Shipping & Transport	T/O & GVA	Other factors	Score	Influence of Marine Environment
Largs	4	1	1	1	1	3	1	4	4	20	M
Loch Fyne	1	2	1	2	1	3	1	3	3	17	ML
Arran	1	1	1	1	1	4	1	3	3	16	ML
Troon	1	1	1	1	1	3	1	3	3	15	ML
Ardrossan, Saltcoats & Stevenston	1	1	1	1	1	3	1	2	3	14	ML
Bute	1	1	1	1	1	3	1	2	3	14	ML
Dunoon	1	1	1	1	1	3	1	2	3	14	ML
Helensburgh	1	1	1	1	1	3	1	2	3	14	ML
Girvan	1	1	1	1	1	3	1	2	2	13	L
Ayr & Prestwick	1	1	1	1	1	3	1	1	1	11	L
Campbeltown	1	1	1	1	1	3	1	1	1	11	L
Dumbarton	1	1	1	1	1	3	1	1	1	11	L
Gourock	1	1	1	1	1	1	1	2	2	11	L
Greenock	1	1	1	1	1	1	1	1	3	11	L
Irvine	1	1	1	1	1	3	1	1	1	11	L
Port Glasgow	1	1	1	1	1	1	2	2	1	11	L
Clydebank	1	1	1	1	1	1	1	1	1	9	L

NOTES & ASSUMPTIONS

Column A lists the 17 locations

Column B - H lists the 7 Key Industries for the study

Column I is Turnover & GVA

Column J is an assessment of the importance/influence of Other Factors such as island or mainland; ferry links; fish landings or marina berths

Column K is the total score

Column L is the overall influence of the marine environment on the location from L = low; ML = medium low; and M = medium

A score of 1 (low) to 5 (high) is given for each factor in Columns B - J.

For key industries this is based on their contribution to overall employment

For T/O & GVA this is based on the contribution of key industries to total T/O & GVA with < 10% considered low and >20% considered high

Defence is scored “1” for Largs despite the high employment reported in Table 4.106 as this is thought to relate more to the Establishment at Beith than to Largs town. This is a function of the ward boundaries used.

Matrix 2: relative ranking of importance between the 17 locations											
	Energy	Fish Farming	Fishing	Construction Related	Defence	Tourism & Recreation	Shipping & Transport	Key Sectors	T/O & GVA	**Score**	*Rank*
Largs	1	4	5	7	1	10	2	1	1	**32**	*1*
Loch Fyne	6	1	2	1	8	8	7	4	2	**39**	*2*
Arran	9	3	4	6	8	1	8	2	2	**43**	*3*
Dunoon	5	2	9	3	8	5	4	5	6	**47**	*4*
Troon	9	4	3	14	3	2	13	3	4	**55**	*5*
Bute	6	4	6	8	8	3	6	7	9	**57**	*6*
Helensburgh	9	4	9	5	8	6	10	8	7	**66**	*7*
Ardrossan, Saltcoats & Stevenston	9	4	9	4	5	7	12	9	10	**69**	*8*
Port Glasgow	9	4	9	10	8	17	1	6	5	**69**	*8*
Girvan	9	4	7	11	8	11	3	9	10	**72**	*10*
Gourock	9	4	13	2	2	15	13	9	7	**74**	*11*
Ayr & Prestwick	9	4	7	12	4	9	11	13	14	**83**	*12*
Campbeltown	9	4	1	9	8	14	13	14	13	**85**	*13*
Dumbarton	3	4	13	16	5	4	17	12	12	**86**	*14*
Greenock	9	4	13	12	8	12	5	15	15	**93**	*15*
Clydebank	2	4	13	15	8	16	9	16	16	**99**	*16*
Irvine	4	4	13	17	5	13	13	17	17	**103**	*17*

NOTES & ASSUMPTIONS

Column A lists the 17 locations
Column B - H lists the 7 Key Industries for the study
Column I is key sectors in aggregate
Column J is the sum of Turnover & GVA %-age contribution by key sectors
Column K is the total score
Locations are scored in order of the importance of the sector / Key Industries to employment or T/O & GVA
1 = most important (e.g. largest %-age employed in any given key sector)
Ranking is based on the sum across each key industry, the aggregate of all key industries and their T/O & GVA contribution
The lower the score, the greater the relative importance and influence of key industries and maritime environment