East Dunbartonshire Economic Development Strategy

Background Research

Contents

This background report was originally written in early 2016 as research for the Draft Economic Development Strategy 2017-2020. The data was updated in September 2017 for the Final version of the Economic Development Strategy, though the original conclusions were not updated to reflect the objectives of the strategy so the original reasoning is still evident.

People

1. Demographics

Population

The 2011 census shows the population of East Dunbartonshire as 105,026, which was 3% less than the previous census in 2001. The Office of National Statistics follows trends to estimate an update annually for the years in between the censuses and they show the population in 2014 to be 106,700. Although this is a slight increase since 2011, the population is still slowly reducing over time.

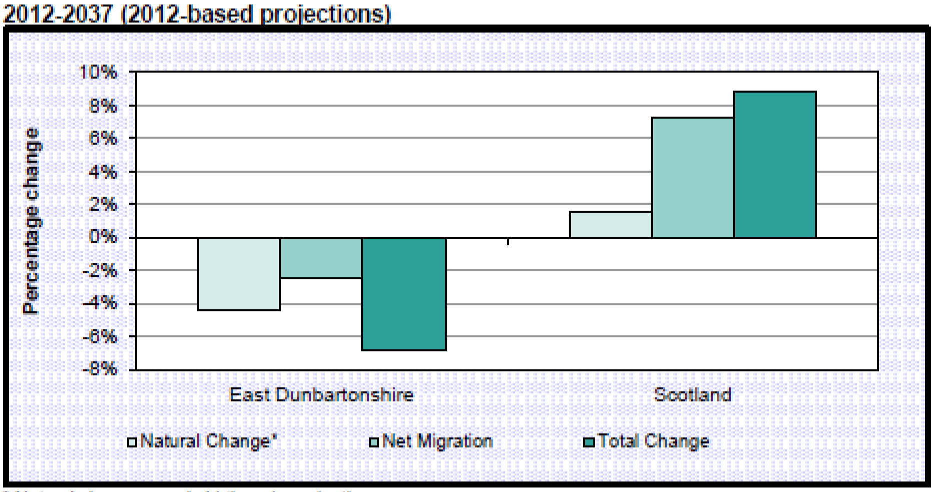
Population: NOMIS

Year	ED	Scotland
1995	109,900	5,103,700
2005	106,000	5,110,200
2015	107,000	5,373,000

This table shows East Dunbartonshire's population decreased by 3,900 from 1995-2005, then had a small increase of 1000 from 2005-15[1]. This increase is negligible as it shows a 0.94% population increase compared to Scotland's 5.14% population increase over the same time period. This shows that despite Scotland's steady population increase, the population of East Dunbartonshire is in decline. Over the same period, the UK population increased by 7.8%. The Skills Development Scotland Regional Skills Assessment for the Glasgow City Region also uses the population data from 2005-2015 and can be used to show comparison regionally. This shows that in this time period, the growth in the City Region is 5%, which matches Scotland's population growth. Using projection data from National Records of Scotland, the population growth in the City Region is forecasted to be faster than Scotland as a whole and projects that in 2037, Scotland's population will increase by 8% while the City Region will grow by 10% (using 2012 as a starting point). The table below shows that over the same time frame, East Dunbartonshire is projected to decrease by 7%.

[1] *For a full breakdown of census data by ward, please refer to the East Dunbartonshire Area Profile, available on the Council Website: https://www.eastdunbarton.gov.uk/statistics-facts-and-figures*

Components of projected population change for East Dunbartonshire and Scotland, 2012-2037 (2012-based projections)



* Natural change equals births minus deaths

The ratio of men to women in East Dunbartonshire in 2011 was 48.2 males to 51.8 females, which was consistent with the national ratio of 48.5 males to 51.5 females, with the Scottish Household Survey showing similar figures for 2015 (48:42). The percentage of the East Dunbartonshire population between the ages of 16 and 44 was 38% which was 7% lower than the national percentage. People living in East Dunbartonshire are more likely to be married or in a civil partnership than the national rates, showing that East Dunbartonshire is a place where people come to settle down with families: the census showed that in 2011, 55.1% of residents were married compared with Scotland's 45.4%; and the Scottish Household Survey measured those who were married or in a Civil Partnership in 2015 and this was 53% in East Dunbartonshire and 47% in Scotland.

The proportion of ethnic minorities in East Dunbartonshire is comparable with Scotland but there were a much higher percentage of Asian, Asian Scottish, and Asian British people in 2014, at 3.2% (East Dunbartonshire) compared with 2.1% (Scotland), though there is little other racial diversity[2]. This is consistent with the 2011 census, which showed that 4.2% of East Dunbartonshire's population were from a minority ethnic background with 3.3% being Asian. In Scotland as a whole, 4% were from minority ethnic backgrounds, 2.7% from an Asian background.

Health

East Dunbartonshire residents are healthier and wealthier than the typical Scottish resident. Using data from 2013-2015, males and females living in East Dunbartonshire had a life expectancy of 80.5 years and 83.5 years, respectively, which is actually a very small reduction for the previous year's

[2] Scottish Household Survey, 2014. The 2015 study is available, but it is rounded and therefore harder to interpret. It shows East Dunbartonshire as 97% white and 2% Asian, Asian Scottish or Asian British; and Scotland as 96% white, 2% Asian, Asian Scottish or Asian British, and 1% other ethnic group.

data (80.8 to 83.9). Male expectancy was 3.4 and female expectancy was 2.4 years longer than the rest of Scotland[3]; the life expectancy in East Dunbartonshire is the highest in Scotland.

In the census, 4.3% of East Dunbartonshire residents reported having bad or very bad health, with this number at 5.6% in Scotland. There are similar numbers for reportedly having a long-term health problem with 72% reporting no condition; 70.1% in Scotland. This is slightly exaggerated in Scotland's Household Survey figures, with only 22% of adults report a long term physical or mental health condition compared to 29% for Scotland as a whole in 2015.

Households

The census showed variations in the tenure of households by council area. East Dunbartonshire was one of only two local authorities where more than 80% of households owned their property (81.2%), this is 20% higher than the Scottish average of 61.5%; and 12% are in council or other socially rented housing compared to 24.3% for Scotland as a whole. The more recent data from the Scottish Household Survey shows a picture consistent with this, even with the far smaller sample size. East Dunbartonshire also had a high percentage of car ownership across the area with 43.1% of households with access to one car or van and 30.2% with two cars or vans available for use. The majority of residents across East Dunbartonshire travelled to work or study by driving a car or van (45%), nearly 5% higher than the Scottish average[4] . There are 2.4 people per household in East Dunbartonshire compared with 2.2 in Scotland, reinforcing that East Dunbartonshire is a place that tends to attract families, and around 1.3 cars per household compared to 1 in Scotland. In 2013, 14% of East Dunbartonshire's households were workless, compared with 20% of Scottish households, and 47% had total incomes of at least £30,000, but only 31% of Scottish households did[5]. There were also 10% more 16 and 17 years olds in East Dunbartonshire in some form of education than Scotland as a whole, and 61% of school leavers went on to Higher education in 2013/14, which is far higher than the 38% of Scottish school leavers. In the Glasgow and Clyde Valley region, those leaving school are less likely to go on to higher education than Scotland as a whole, and East Dunbartonshire; instead going straight into work or into further education.

[3] National Records of Scotland, Life Expectancy for Areas within Scotland 2013-2015

[4] EDC Area Profile (using Census data)

[5] Skills Development Scotland East Dunbartonshire Skills Assessment January 2016

2. Labour Market

Employment

In addition to having a declining general population in East Dunbartonshire, there is also a declining working age population (16-64). It has been estimated that between 1995 and 2015, East Dunbartonshire’s population fell by 2,900, but the working age population fell by 6,400, meaning that the viable workforce is reducing at a much faster rate. Although the country as a whole is facing an ageing population, there has still been an increase in the total numerical figure of working age people. In that 20 year period, the Scottish population increased by over 5%, and the working age population stayed about the same (+0.2%)%; the East Dunbartonshire population increase was low (0.94%) but the working age population decreased by 4.5%.

NOMIS provides a differentiation between employment categories: the employment rate is the percentage of people currently in work from the working age population (16-64); economically active is those that are employed or unemployed from the entire population, not including those that are retired, a student, looking after a home etc. who are considered to be economically inactive; and the unemployment rate is those that are unemployed out of those that are considered economically active, and therefore from the entire population.

The East Dunbartonshire rates for each of the above categories are better when compared with Scotland as a whole; this gap had been narrowing but the East Dunbartonshire rate is once again strengthening. The employment rate is currently 75.6% which is 2.2% higher than Scotland[6]. Despite this, Scotland has almost returned to pre-recession rates whereas East Dunbartonshire is still a bit behind. In terms of economic activity, Scotland has been relatively steady with minimal increase. East Dunbartonshire has been less steady and the rate of economic activity is now lower than ten years ago and only 0.7% higher than Scotland as a whole even though the gap was previously larger.

The employment rate in East Dunbartonshire has fallen faster than the economic activity rate showing more people are moving from employed to unemployed although may still remain economically active. Rates have been improving over the last few years but have still not caught up with pre-recession conditions. The Scottish and East Dunbartonshire unemployment rates increased a bit after the economic crash but have now recovered though East Dunbartonshire’s is still lower than the Scottish rate, at 3.4%; and Scotland’s is 4.5%.

The Skills Development Scotland (SDS) Regional Skills Assessment for Glasgow and Clyde valley shows that between 2009 and 2012 total employment (the number of people working in East Dunbartonshire) fell 2%, Scotland fell 4%, and the Glasgow and Clyde valley area fell by 7% with East Dunbartonshire’s fall actually the lowest in the area. However, due to the fall in working age population it is unsurprising that there would be fewer people in jobs, and this doesn’t account for those that become economically inactive as opposed to unemployed. This report also shows that in

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[6] NOMIS as of March 2017

2013, 76% of the population were in employment, which was the highest percentage in the area; the lowest being Glasgow with 59%.

The percentage of Job Seekers Allowance (JSA) claimants has consistently been lower than Scotland as a whole between 2000 and 2016, and both figures have been steadily decreasing with a spike during the recession. Considering the unemployment rate increased over the same time period, this may be indicative of fewer resources, and less available support as opposed to fewer people looking for employment. The SDS East Dunbartonshire report shows that in 2013/14 there were 2,100 people unemployed and actively looking for employment, which rose to 2,500 in 2014/15 which is an increase of a roughly a fifth.

Income and Qualifications

There is quite a significant discrepancy in the amount earned by those that work and those that live in East Dunbartonshire. It wasn't until 2014 that Scotland took over in terms of workplace earnings; earnings in East Dunbartonshire have been decreasing sporadically over the last few years, whereas Scotland's has been steadily increasing.

Residents earn £94.20 a week more than the Scottish average, but those that work here earn £164.70 a week less than those that live here, and £68.40 less than the average Scot.[7] This wage inequality is a huge concern because due to the affluence of the residents, the environmental quality of the area and the quality of our schools, those that work here often can't afford to live here.

Perhaps the most surprising figures are that males that work in East Dunbartonshire actually do still earn more than the average Scottish male. What drags the figure down is the huge discrepancy between male full time workers and female full time workers. Females working full time in East Dunbartonshire earn £136.60 less than the average Scottish female; £189.00 less than the average Scottish worker; and a considerable £273.00 less than East Dunbartonshire's male equivalent. For residents, women make £149.50 less than their male counterparts, while the average Scottish female makes £87.50 less.

In percentages in terms of residents, this means that Scottish men earn 6% more than Scottish women, while East Dunbartonshire men earn 28% more than East Dunbartonshire women and 20% more than Scottish men. East Dunbartonshire women earn 11% more than Scottish women and are in line with the Scottish average for all people. In terms of workplace earnings, East Dunbartonshire men earn 79% more than women and 20% more than Scottish men. East Dunbartonshire women earn 46% less than Scottish women and 55% less than the average for all Scottish people.

It is difficult to identify a reason for these discrepancies, particularly for those that work in East Dunbartonshire, because the census only captures data for those living in East Dunbartonshire. According to the 2011 census, women are far more likely to work part time hours - 9,884 of those economically active compared with 2,718 of men. Women are also more likely to be economically inactive than men with 10 times more looking after a family or home (2,222 to 220), and a higher number of retired people; though lower numbers of long-term illness or disability. In terms of

[7] NOMIS as of 2015

industry, women are far less likely than men to have professions in the manufacturing, construction, transport and primary industries, and slightly less likely to be in the information and communication industries. They are far more likely than men to be in the education and human health industries, and slightly more likely to be in the real estate, and financial and professional services industries. When comparing occupation groups, men and women are quite evenly matched in SOC1-3 (professional), and 4-5 (admin/ skilled trade); though more men are in the managers, directors and senior officials grouping. More women are within the SOC 6-7 (care and service) group, and more men are in the 8-9 (machinery/ elementary) group.

Education

In terms of qualifications, East Dunbartonshire people tend to have higher qualifications than other parts of Scotland and indeed Scotland as a whole with far higher proportions gaining a minimum of a NVQ4 level education than Scotland, 58.7% and 43.7% respectively; and a very low proportion having no qualification at all, only 4.8% compared to 9.9% of Scottish people[8]. East Dunbartonshire also has a reputation for having high-quality schools; two of which, Bearsden Academy and Douglas Academy, are in the Herald's school league table top 10 for 2016 based on the percentage of pupils that leave school with 5 or more Highers.

However, according to a route corridor study on the A81 carried out in March 2015 using data from the 2011 census, only about a quarter people residing in East Dunbartonshire actually work in East Dunbartonshire, meaning that our highly educated population is taking this benefit elsewhere.

Data also shows that in addition to being highly educated, East Dunbartonshire residents are more likely to have a professional or managerial level job than the average Scot with 59.9% in categories 1-3 compared to Scotland's 42.8%, and are less likely to have a low-skilled job with 9.6% with a job in categories 8-9, when Scotland has 17.5%. However, this data is based on residents as opposed to those that work here, and since we know that most residents work out with the authority, residents are benefitting from the high quality schools, going on to higher education elsewhere, and working elsewhere thus taking the economic benefit out of East Dunbartonshire.

When we compare qualifications by gender, men and women are fairly evenly matched in terms of numbers though there are 1.1 times more women than men; when this is accounted for it is still fairly even, though it can be seen that women are slightly more likely than men to have no qualifications, though there are also more likely than men to be qualified to level 4 and up, which does nothing to help explain the significant pay gap.[9]

Job Density

Job density can be used as a tool to measure the availability of jobs in the area, and in each town. It is calculated by dividing the number of jobs by the working age population (people aged 16-64). The current job density of Scotland is 0.79, meaning for every 10 working aged people, there are just under 8 available jobs which is slightly behind the UK at 0.83. For the whole of East Dunbartonshire, the job

[8] NOMIS data from January 2016 – December 2016)
[9] 2011 Census

density is 0.45, which is the second lowest performing figure in the Glasgow City Region, after East Renfrewshire which is 0.43; both are far below the next lowest which is West Dunbartonshire with 0.57, and the job density for the whole region, which is 0.66. The ratio for Glasgow is 1.04, which means there are more jobs available than there are working aged residents to fill them which is why there are a lot of commuters going to the area.

Gross Value Added

The following data comes from the Skills Development Scotland (SDS) Skills Assessment report for East Dunbartonshire, and the Skills Development Scotland Regional Skills Assessment report for Glasgow and the Clyde Valley in order to compare the GVA to the region. Glasgow and Clyde Valley provide about a third of Scotland's GVA output, or £35.2 billion of Scotland's £106.3 billion in 2012. The region has a slightly higher dependence on the public sector than Scotland as a whole, as well as a slightly higher real estate sector and a smaller production sector which was 15% of the economy in 2011, and 19% of the national economy. In East Dunbartonshire, the public sector is even more prevalent than it is regionally, and there is a higher contribution from the production sector, but it provides a small contribution to the overall Scottish economy which SDS attributes to a small population and small business base. It also shows that GVA in Scotland increased by 2.9% in 2013, but only 2% in East Dunbartonshire.

In terms of productivity per worker, according to data from the ONS Regional Gross Value Added (income approach), GVA (excluding extra-region output e.g. North Sea oil and gas) in 2015 was £25,351 in the UK and £23,685 in Scotland. It also shows GVA in Scotland to be the fourth highest region in the UK behind London, the East and the South East, though lower than England as a whole (£26,159) this can be attributed to the much higher GVA in London (£43,629). Scotland had the second fastest growth in GVA per head between 2013 and 2014 along with the East of England (both 4.2%) and behind only London (5.3%); the slowest were Northern Ireland (1.9%) and Wales (2.1%). However, between 2014 and 2015 this picture changed quite a bit with Scotland growing the second slowest of the 4 UK countries in this time frame, despite having the fastest growth the previous year.

In 2015, East Dunbartonshire had the second lowest GVA per head in Scotland, behind only East Renfrewshire. However this is an improvement over the previous 10 years as since 2005, East Dunbartonshire's GVA increased by 3,860 when East Renfrewshire's only increased by 1,819 which allowed East Dunbartonshire out of the last place. The highest GVA's are in the major cities with the highest being £47,006 in Aberdeen City, while with the exception of East Renfrewshire, East Dunbartonshire's is considerably lower than most other authority areas at £13,985 per head.[10]

Glasgow City Region

The Glasgow City Region is an interconnected region, with people from all areas commuting to other areas for work, most commonly into Glasgow City. Due to this interdependency, it is necessary to plan development and services as a region, as well as individual authorities as development in other authorities is likely to affect residents in this authority. Clydeplan is the authority that oversees the

[10] Regional GVA(I) by local authority in the UK, ONS

city region and coordinates the Strategic Development Plan for the area; the following data comes from them. Since 2008, total employment in the region has fallen by 86,000 and these losses are not expected to be recovered within the next 25 years[11]. This is the equivalent of a 9% job loss, when Scotland as a whole experiences a 4.1% loss in employment. Between 2008 and 2012, the largest job loss was experienced in the construction industry, which shrunk by 31% over this period, with the loss of 17,500 jobs. The 2015 unemployment rate for the Glasgow City region is 6.6%; this is a higher rate than both Scotland as a whole which is 5.9%, and East Dunbartonshire which is 4.9%. There is a high proportion of administrative and support services, information and communication, and financial and insurance activities; and a high reliance on the public sector for employment.

According to ONS data of regional productivity from January 2017, the Glasgow City Region GVA is 6% lower than the UK average, while the Edinburgh City Region has a similar performance. Deprivation in the Glasgow City Region is the worst in Scotland. It has over 70% of the most deprived wards in Scotland; around three quarters of these are within Glasgow itself. As can be shown above, although East Dunbartonshire has a few pockets of deprivation, it does not suffer from large amounts of deprivation. The population of the region is projected to increase by 3.65% by 2037; this is much less than Scotland's projected growth of 8.8%, though much higher than East Dunbartonshire's projected 6.8% decrease.

People Conclusions

East Dunbartonshire is a healthy and wealthy area with a decreasing and ageing population. The employment rate is higher than Scotland's and the unemployment rate is lower, but the gap is narrowing between both, meaning the area is not keeping up with the country. JSA claimants are reducing yet the number of unemployed people actively searching for a job has increased. Men earn quite a bit more than women and those that live here earn more than those that work here, implying the area has a business base with a lower value than other areas.. There is also a lack of available jobs in the area which can contribute part of the explanation for the declining working age population. This may also contribute to the ageing population because it is a quiet commuter area making it attractive to retirees. Another major issue is that people that live here cannot afford to live here, and there is a lack of affordable housing; the Council currently manages around 3,600 houses and the housing list has more than 4,000 applicants but there are approximately only 300 lets per year.

Based on this research it would appear that East Dunbartonshire needs to increase the business base, either by attracting inward investment and getting larger companies to want to locate within the area; or by helping the existing businesses to grow and access new markets. This would in turn create more employment opportunities, which would assist in addressing the existing inequalities between those that live and work here. If we could attract higher value businesses, it could also help to enable people in the area to afford to live in the area. There also needs to be more effort to address the gender inequality thorough business support services for women.

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[11] Strategic Development Plan Background report – Economic Outlook and Scenarios for the Glasgow and Clyde Valley City Region 2013 - 2038

Business

3. Existing Business

Business and Sectors

Skills Development Scotland shows that in East Dunbartonshire there were 3,115 VAT/PAYE registered businesses in 2014, which was up 4.5% from 2013, and above the 2.8% growth in Scotland. Since 2010, the business base has grown by 6%, which is just above the 5% growth in Scotland[12]. At a regional level, there was no change in the number of registered businesses in Glasgow and Clyde Valley between 2008 and 2013, compared to a 2% rise nationally in that time, and at a UK level, there was a 1% fall in the total number of registered businesses over the period. However this may have changed between 2013 and 2014.

The Scottish Annual Business Statistics (ONS) can be used to form some indication of East Dunbartonshire's sectors by comparing them to Glasgow and Clyde Valley as a whole. The table below shows East Dunbartonshire's performance in a number of sectors based on number of units and total turnover, compared to the region as a whole, as well a few individual Local Authorities from within the area. Total turnover is in £millions.

Business Units and Turnover by Sector in East Dunbartonshire, compared with other local authorities:

	Total in Glasgow City Region	East Dunbartonshire Council (%)	East Renfrewshire Council (%)	West Dunbartonshire Council (%)	Glasgow City Council (%)
Manufacturing					
Units	2,630	5	3	4	31
Turnover	10,268.5	2	<1	7	32
Construction					
Units	5,270	7	5	4	28
Turnover	5,685.7	3	3	2	40
Wholesale, retail& repairs					
Units	11,307	5	4	4	40
Turnover	21,542.5	3	3	3	36

[12] Skills Development Scotland, East Dunbartonshire Skills Assessment, January 2016

Transport & Storage					
Units	1,920	4	3	4	24
Turnover	3566.1	<1	1	2	31
Accomodation & Food Service					
Units	4,145	4	3	4	45
Turnover	1,631.6	2	4	2	58
Professional, scientific & technological					
Units	7,627	8	7	3	41
Turnover	Not available				

East Dunbartonshire's population is around 6% of the Glasgow Clyde Valley region, so using this to compare with their share of each sector in units and turnover it is evident that most of these sectors are smaller than their total share in the region. There are more units in the construction sector based in East Dunbartonshire but a much smaller contribution to the total turnover, with Glasgow in the opposite position, meaning they likely have larger businesses of higher value. Similarly, East Dunbartonshire claims 8% of the total units within the professional, scientific, and technological sector; however data is not available for total turnover for the region to make a comparison. GVA per head for the manufacturing sector in East Dunbartonshire is <£60,000 which is the lowest category measured, and the Local Authority share of the sector is less that 1%, also the lowest available category, meaning the manufacturing sector is quite small.

The fact that people that live here are higher earners than Scotland as a whole but the people that work here earn less than Scotland, shows not only that higher earners work out of the area but also indicates the business economy is actually quite poor compared to national level because we don't have the high value businesses to keep highly educated residents working in the area. The above table also shows our contribution to the area is small relative to the population. However, East Renfrewshire is the most similar Local Authority to East Dunbartonshire in the region with respect to demographics, assets and challenges, and the business base appears to be quite similar, with proximity to Glasgow making it difficult to retain larger value businesses and resident employees.

The table below shows the breakdown of East Dunbartonshire's business by enterprise size in a Business count from 2016 (ONS) and as can be expected based on the previous information, it is a place with a higher than average percentage of SME's, particularly micros businesses.

East Dunbartonshire Businesses

Businesses	*East Dunbartonshire*	*%*	*Scotland*	*%*
Micro 0-9	2,710	91.2	150,985	87.5
Small 10-49	2235	7.9	17,470	10.2
Medium 50-249	25	0.8	2,755	1.6
Large 250+	5	0.2	690	0.4
Total	2,970		171,900	
Local Units				
Micro	3,000	85.7	177,410	81.2
Small	415	11.9	33,455	15.3
Medium	80	2.3	6,560	3
Large	5	0.1	1,050	0.5
Total	3,500		218,470	

The above data from NOMIS shows that there are 2,710 businesses in East Dunbartonshire; however this does not include many home or lone businesses, or businesses that operate under the threshold of which they would need to register so it is likely that this number is grossly underestimated. It also shows that almost 92% of businesses are micro enterprises, with a further 8% being small businesses. With small enterprises representing 98% of our businesses, it is essential that we have adequate services to help them flourish.

Based on the fact that the discrepancy between weekly earnings for residents and those that work here is vast, there is a concern that our businesses are not performing as well as other areas. This is due in part to our proximity to Glasgow and strong transport links there, so people can travel into the city with ease and since East Dunbartonshire is largely a commuter area, our residents are often already in Glasgow on a daily basis, meaning it is likely they use facilities and shopping before they return to East Dunbartonshire so our towns may not benefit from the higher wages of commuting residents.

Business Gateway data indicate that in 2015, the survival rate for start-ups that accessed their services after 12 months was 88% though this omits the companies that they were unable to contact. ONS data shows that 95% of businesses in East Dunbartonshire in 2013 survived their first year of trading.

Retail

Retail is a large part of the Scottish economy providing 20% of Scottish GDP and 5.5% of Scottish GVA. The retail industry provides 257,000 jobs which equates to about 14% of all jobs and almost a quarter of business rates; and around 9% of all Scottish businesses are retailers[13]. The sector is changing drastically with more informed and demanding consumers, and the rise of digital

[13] Scottish Retail Consortium

advertising and services has changed the way customer service is delivered. The retail industry also contributes around £3billion of output from other sectors, spending a lot of money on business and financial services, real estate and legal and accounting services. Online retail rose from about 3% in 2007 to more than 10% in 2010 and is set to rise further.

East Dunbartonshire has a retail sector relative to its size; it is 2% of Scotland's population and contributes 1-<3% of the GVA in Scotland for the sector. However, the area is far more reliant on its retail sector in terms of employment than other authorities, with 12.8% of employment from retail; the second highest rate in Scotland. The national rate for shop vacancies is 9% so East Dunbartonshire is slightly better performing with 6% at the end of 2015/16.

In 2014, East Dunbartonshire received the report for the Retail Capacity Assessment that Ryden had been commissioned to carry out to inform policy options for town centres. This report provides analysis of each of the main town centres individually (outlined in 'Place' chapter) but below are some general conclusions that can be drawn from the study.

The study shows that retail growth has been slow in the area and there has been a decline in the development of supermarkets. Occupancy levels are high but there is little demand from chains to locate within the area so there is a reliance on local and regional retailers; however the study also states that there has been loss of retailers due to business failures and contracting chain retailers which has had an impact on town centres. Letting demand is primarily for smaller units and rental values vary considerably across the authority, with a low of £94 per square metre in Kirkintilloch and a high of £500 per square metre in Bearsden.

In terms of shopping locations by residents, the main focus appears to be Glasgow City centre. For personal goods, clothing and fashion, and furniture, floor coverings and furnishing, all catchment areas reported their main destination as Glasgow centre, in quite high proportions. For domestic appliances and DIY/ hardware, residents of Bishopbriggs, Kirkintilloch and the northern villages reported using Strathkelvin retail park, whereas residents of Bearsden and Milngavie were more likely to use Glasgow city centre for domestic appliances and Great Western retail park for DIY/hardware, though 13% would use Strathkelvin for the latter category.

For convenience shopping, 80% of Bearsden residents use either Bearsden or Milngavie, with 94% of Milngavie residents also doing this; residents of neither appear to use the other East Dunbartonshire areas. Bishopbriggs residents primarily convenience shop within the town, and Kirkintilloch residents mostly use either Kirkintilloch or Bishopbriggs, both with little movement to Bearsden or Milngavie. The study concludes that there is no additional expenditure from convenience shopping to support 'additional major retail floorspace', and there is little opportunity for the claw back of leaked expenditure.

Home-based business

The Federation of Small Businesses released a report on home based businesses published in February 2015 recommending that local authorities pay more attention to home-based businesses and recognise their contribution to the economy. The report surveyed member organisations and found that 17% of all private sector employment and 10% of private sector turnover were from home-based businesses; the Scottish Government estimates 56% of all businesses in Scotland to be home-based. The most common sectors are hotel, catering, leisure, tourism and entertainment (24%) and business services (12%), as well as some within the creative services (8%) and construction (7%) sectors. The study further evidences their economic value, showing that 73% create full-time paid employment and the contribution is estimated at £300bn.

The study also shows that 19% of home-based businesses use flexible workspace and around half of those that don't say it is because there are not any available near their home. Those that do use the space quote their main reason as meeting people (81%); networking (43%) and co-working (24%) provided as less common reasons. In rural areas 59% said they would not use one if it were available, compared to 90% of those in urban areas saying that they would be likely to use one.

Home-based businesses are very difficult to track as many are not registered, and don't approach business support services making them less visible. East Dunbartonshire has a high share of micro-businesses and SMEs so it is likely there are a lot of home-based businesses we are unaware of. The study recommends Local Authorities produce a guide to running your business from home that details regulations and advice from existing home-based business owners and information on sources of advice and networking. They also recommend that they should work with other public bodies to ensure there is supporting infrastructure for home-based businesses, such as flexible working space to provide them with space and equipment that is unavailable in the home and to facilitate collaborative working.

In 2016, FSB publicised the results of a study and found East Dunbartonshire to be one of the most entrepreneurial regions in Scotland. Eight out of ten East Dunbartonshire towns included in the national data have higher than the 6.4% average figure for self-employment.[14] The top performing East Dunbartonshire towns were Torrance and Bearsden where there is 10.78% and 10.64% self-employment respectively.

Town	**Self Employed %**
Torrance	10.78
Bearsden	10.64
Milngavie	9.96
Lenzie	8.88
Bishopbriggs	7.42
Milton of Campsie	7.15
Lennoxtown	6.83
Kirkintilloch	5.89

[14] http://www.fsb.org.uk/standing-up-for-you/national-offices/scotland/entrepreneurial-towns/highest-and-lowest-self-employed-towns-in-scotland

Twechar	5.71

Council Footprint

The Council is a major employer in the area so has a significant effect on the local economy. The Improvement Service has been rolling out the Economic Outcomes Programme across all 32 councils in Scotland to analyse the economic footprint of each council. They will do so by analysing the postcodes of staff to find out the proportion of employment that is local, and procurement data to show how much the local community and smaller businesses benefit from tenders. EDC are currently taking part in this project and a final copy of their findings will be available towards the end of 2017 and will suggest areas in which this contribution can be enhanced. Initial data shows that East Dunbartonshire Council employs 4,143 people (2014/15), 3.7% of the total East Dunbartonshire area working age population; around 58% of employees live in the East Dunbartonshire Council area; and East Dunbartonshire employment and payroll spend is relatively low in the most employment deprived areas.

Another way in which council procurement can affect the local economy is by adding Community Benefits clauses into contracts from tenders. The Scottish Government mandate that any contract with the council with a value of over £4million must have a community benefit clause included, though East Dunbartonshire Council has been including these clauses in new contracts for the last year in lower value contracts as well. These clauses are used to extract added value from contracts for economic, environmental and social benefit; this can include targeted local recruitment, landscaping improvements, donating time to local charities, using local SMEs for supply chain purposes etc. This process is currently being developed to become more efficient so will provide more benefits as this process is streamlined over the coming years.

4. Emerging Business Models

East Dunbartonshire is considered by many a commuter location. Many people locate within East Dunbartonshire in order to raise a family, benefit from the good schools and beautiful scenery whilst remaining close enough to the city; and commuting out of the authority for work. One consequence of this is having a relatively small business base and less obvious primary sectors. The area has a higher than average proportion of micro-businesses, and most likely has a high number of home-based businesses, though this is difficult to track because many are not registered. The business world is becoming more digital and consumers expect everything to be convenient so it is essential that new business models are being explored and encouraged.

Agile Working

Organisational agility is the ability to address forces affecting your business. There are many different components including flexible start and finish times, working longer one day to allow for an appointment the next, having flexible working space as opposed to set desks, and 'smart-working' or being set up to work from different places are among them. The Chartered Institute for Personnel and Development (CIPD) reviewed agile working in a 2014 study and shows that 56% of organisations in the UK named smart-working as one of the best tactics to improve productivity. The study shows that flexible working can be cost efficient due to the improvement of work-life balance and job satisfaction however only 62% of organisations consider flexible working when an employee requests it, and less than half said that it is open to all employees.

Workplace and workforce agility is becoming more and more prevalent, and there are organisations set up advocating the economic benefits. The Agile Future Forum is a collection of 22 private companies including BT, Lloyds, Tesco, HM Treasury and KPMG, who believe that workplace agility will allow UK companies to remain competitive. They identify 4 aspects of an agile workforce: Source (outsourcing, freelance, sharing); Role (secondment, job rotation, flexi-teams); Times (Self-rostering, flexitime, output targets); and Location (hot desks, workplace hubs, mobile). They purport that matching the workforce to fluctuations in demand will achieve the most value, and workplace benefits associated with agile working will attract high quality talent for the organisation.

Flexible office space can be of great benefit to home-based, small or start-up businesses. It can provide a place to meet clients in a professional space, reduce costs by not having to hire reception staff or pay permanent rent or business rates, and allows flexible contracts as your business grows. It is also an in-built networking space with other small and home-based businesses in the area.

Sustainable Business Models

Social Enterprise

A social enterprise is a business with a socially responsible business model, defined in the Social Enterprise in Scotland census 2015 as 'businesses that trade for the common good rather than the unlimited private gain of a few, they tackle social problems, strengthen communities, improve people's life chances, and protect the environment. They reinvest any profits to deliver on this social purpose.' The social enterprise sector in Scotland provides 112,409 jobs and has 67,768 volunteers among the 5,199 enterprises. More than 200 emerge every year and 42% have formed over the last 10 years; 67% are also registered charities[15]. The sector has a net worth of £3.86bn and an estimated GVA of £1.68bn. Social Enterprises also include Housing Associations and Credit Unions and have become more prevalent since the recession, with a 32% increase in membership to credit unions. They can also be a Company Limited by Guarantee (48%), a Community Interest Company (8%), a Scottish Charitable Incorporated Organisation (6%) or an Industrial and Provident Society (8%), with an additional 30% remaining unincorporated e.g. Development Trusts (5%) and Voluntary Organisations (25%).

The locations of social enterprises tend to be consistent with levels of deprivation, and they are more likely to locate within rural communities that tend to be quite remote and have limited job opportunities which are most likely why there is a high proportion in the Highlands with 22% of all social enterprises but only 9% of the population.

East Dunbartonshire has 0.5 social enterprises to every 1,000 people. This is the lowest rate in Scotland, alongside East Renfrewshire, Falkirk, Fife, Renfrewshire, South Ayrshire and South Lanarkshire. Although East Dunbartonshire has a low proportion of Social Enterprise, it is well connected and relatively affluent so arguably social enterprise isn't as likely to be located here as there is a lower need than other regions. Most social enterprise locations are somewhat reflective of the population, though East Dunbartonshire has 2% of Scotland's population but only 1% of all social enterprises, or 51 in total.

The largest sectors for social enterprise in terms of number of enterprises are arts and creative industries, childcare, and community assets with 14%, 13% and 12% of the share of social enterprises, respectively. The largest sectors in terms of income are housing and health, and social care with 40.8% and 26.3% of the income, respectively. The sector is also a great advocate for fair working standards and equality; 48% of board members are women and 60% has a woman in their most senior role. The voluntary practice for social enterprise in Scotland suggests a ratio of 1:5 for the lowest: highest paid in the organisation; 97% follow this rule and 68% pay at least the living wage. 70% report half their employees are female, 75% employ over half their employees locally, 48% employ people formerly disadvantaged in the labour market and 28% target recruitment at deprived areas or groups.

The most reported barrier to development is lack of time/ capacity to develop trading activity (59%); insecure or declining grant funding (50%), increasing costs (41%) and difficult market/ trading conditions (29%). Though, 81% expected to apply for a grant within the following year, but only 15% were planning to apply for a loan. The most common type of desired support is business development followed by business planning and digital technology.

As mentioned above, East Dunbartonshire has around 51 social enterprises, many of which have a turnover of over £100,000. East Dunbartonshire Voluntary Action is the Third Sector Interface for the area, to act as a central point of contact for charitable organisations, volunteers and partner organisations. At the end of March 2016 they had 346 registered volunteers, primarily from

[15] Social Enterprise in Scotland Census

Kirkintilloch as that is where EDVA is based. EDVA's data shows that 58.4% of volunteers are women, and 23% identify as being from the BME community which is a very high proportion, considering the BME community is only 4.2% of the population of East Dunbartonshire. Volunteering is also widely used by those out of work with 24% not in employment or education and an overall increase in those being directed by Job Centre Plus in order to use volunteering as a pathway to employment.

Circular economy

The Circular Economy model, which focuses mainly on products, components, and materials, provides a good model for delivering sustainable economic growth. In a circular economy we are able to extract the full value of the product by repairing it when broken, and the material is used for new generations of the product when it can no longer be repaired.

Zero Waste Scotland has estimated that 11 million tonnes of greenhouse gas can be cut by 2050 if there is a move to a circular economy, but also a saving across our business sectors with research showing that over 8 manufacturing sub-sectors there could be an annual saving of £0.8-1.5 billion, and £1.5 billion over 10 consumer goods categories.

As well as reducing resource use and pollution, including carbon emissions and landfilled waste, the circular economy model offers a profound transformation of the way our entire economy works, and The Scottish Government are promoting it as a means of sustainable economic growth via job creation.

The Scottish Government strategy for a circular economy *Making Things Last* identifies four priority areas:

- Food and drink, and the broader bio-economy – Zero Waste Scotland's report on beer, whisky and fish production identified potential savings of between £500 million and £800 million per year.
- Remanufacture – which contributes £1.1 billion to annual economic activity with potential to add an additional £620 million by 2020.
- Construction and the built environment - representing about 50% of all waste arising in Scotland; influencing the built environment has an impact on wider resource efficiency.
- Energy infrastructure - with the recent growth in renewables and £30-35 billion of oil and gas decommissioning spend expected by 2040, the potential for added value is significant.

It provides the following diagram to illustrate shifting to a circular economy:

In East Dunbartonshire, Zero Waste Scotland has a volunteer programme to help local communities to reduce their waste. The aim of the programme is to provide practical advice to communities, and empower people to shop smarter, waste less, save money, and help create a greener and cleaner Scotland. The programme contributes to the circular economy agenda through assisting SMEs to become more resource efficient, and hopefully will stimulate business to identify new green, resource efficient ways to do business.

Natural Capital

Natural capital includes earth's natural assets such as the soil, air, water, geology and biodiversity. It seeks to demonstrate the value of nature in economic terms, and therefore help everyone, including businesses, to reach decisions that consider the full costs and benefits of the proposed use of an ecosystem, rather than just costs that enter markets in the form of private goods. The services that can be given a monetary value have been estimated to be worth between £21.5 and £23 billion per year to Scotland

The *Natural Capital Protocol* released in 2016 is a global standardised framework that has been developed in collaboration with over 200 global businesses and organisations including the Scottish Forum on Natural Capital. The Protocol has been designed to help businesses to identify, measure, and value their direct and indirect impacts and dependencies on natural capital and inform decision making in business.

Business Conclusions

East Dunbartonshire has a high number of small and particularly micro businesses and in large sectors such as manufacturing and construction there is a higher proportion of units compared to turnover so is likely populated with smaller, lower value units than other parts of the city region. The area also has a relatively high percentage of employment from retail despite slow retail growth. Retail provision across the towns varies, and each town seems to be lacking different things.

It seems as though a priority for the area is building on existing knowledge of the business base and as the business services that are available in the area. There are several organisations operating in the area offering business support including Business Gateway, Scottish Enterprise, EDVA, Federation of Small Businesses, Chamber of Commerce; and it is vital that we work in partnership to make sure businesses are able to access the right support at the right time. Our business base is relatively small or smaller value and it is important that we understand it better and work towards increasing the business base, either by attracting inward investment or by supporting existing businesses to grow and enter new markets.

The council is equipped with the ability to smart work from different places and should be making sure that our local businesses have the space, technology, and support to grow their businesses in an efficient and effective way. A way of doing this is by understanding these alternative business models which have added value.

Places

5. Location

East Dunbartonshire is very conveniently located to the North of Glasgow providing easy access to Glasgow and Edinburgh. There are several links to the M80 to travel by car and public transport links are excellent, with well-serviced buses and several train stations linking to the major cities. Stirlingshire is to the north sharing some of our beautiful landscape assets such as the Campsies and Mugdock Country Park; and Loch Lomond and the Trossachs National Park is reachable within half an hour.

Tourism and the Visitor Economy

Scotland has a large tourism sector with £5 billion visitor expenditure in 2015 from overnight visitors, with more people visiting from England than anywhere else. Of the 14.86 million trips taken in Scotland in 2014 39% were by Scottish residents, 43% from the rest of the UK, and 17% were from overseas. According to a visitor survey by Visit Scotland from 2015, the most popular reason for those visiting Scotland (or other parts of Scotland as is sometimes the case) is for the scenery and landscape (50%), the history and culture (33%) and having been before and wanted to return (24%). Scenery and landscape was cited as the top reason by visitors from Scotland, the UK, Europe, and the rest of the world. This survey also highlighted the importance of digital marketing, as 70% of people stated their source of information to plan their trip as websites; 86% using a Google search, 46% using Visit Scotland and 45% using traveller review websites, such as tripadvisor. It also shows 63% using reviews left by other travellers as the main type of information for planning their trip.

It is very difficult to find information that is specific to East Dunbartonshire or the wider region. The Visit Scotland visitor survey shows that 22% visited Greater Glasgow and Clyde Valley and 9% stayed overnight[16], but there doesn't appear to be available information on the visitors to the area or what they do while here. Visit Scotland does identify some of the main tourism sectors for the country which include several that East Dunbartonshire would have the opportunity to capitalise on, such as cultural tourism and golf holidays. There are many cultural attractions in the area, as outlined in further detail below.

The West Highland Way http://www.west-highland-way.co.uk/home.asp

The West Highland Way was the very first, and is the most popular long distance route in Scotland. It is 96 miles (154km) long, and stretches from Milngavie all the way up to Fort William, showcasing some incredible views of historical Scotland such as Mugdock Country Park, Loch Lomond and Glencoe. The official start of the walk is in Milngavie town centre where there is a granite obelisk where walkers take their start picture, and a 'West Highland Way' archway to pass under as they set off. Every year over 80,000 people walk the route, with around half completing the entire walk. The walk is easy to access, with plenty of bed and breakfast options for people staying the night before

[16] Visit Scotland Visitor Survey 2015-16

they head off, and easy transport access with a train station right next to the start. There are also many local businesses that provide a bag handling service, so walkers need not carry all of their camping equipment on their walk.

The John Muir Way http://johnmuirway.org/

This 134 mile (215 km) trail was so named after the conservationist and 'father of American National Parks' beginning in Helensburgh, the place from where he left Scotland upon emigration to the US; and ending in his birthplace of Dunbar. This coast to coast route goes straight through East Dunbartonshire from below the Campsies then follows the Forth and Clyde Canal through Kirkintilloch and Twechar, which is on the 13 mile section of the route from Strathblane to Kilsyth. An article in the BBC which reveals the results of a Scottish Natural Heritage user survey shows that there were more than 60,000 visits to the trail in 2015 for the purpose of walking or cycling a stretch of the route, 6,000 of those completing the whole route over consecutive days. In addition, it reports that there were a further 200,000 using sections for other purposes such as dog-walking or commuting.

The Thomas Muir Trail and festival http://www.thomasmuir.co.uk

Thomas Muir was an important figure in Scottish political reform and in 2014 a trail was dedicated to his life. The 11 mile (18 km) trail begins at the foot of the Campsies and curves around to his hometown of Bishopbriggs. The trail is marked by way markers with QR codes allowing users to get information about the life of Thomas Muir on their journey. There has also been a Thomas Muir festival the past few years towards the end of the year, organised by the Friends of Thomas Muir, a local community organisation.

The Forth and Clyde Canal and trail, and festival

East Dunbartonshire is fortunate to have the Forth and Clyde Canal running through the area from east to west. Work began on the canal in 1768 and was completed for opening in 1790. The canal was closed in 1963, but was reopened in 2001 as part of the £83.5 million Millennium Link restoration and has since been a great attraction for tourism and leisure activities. Around 115,000 used the canal towpath at Cadder in 2014, which gives some kind of indication about usage and the increase in popularity, as the same counter shows around 90,000 in that same stretch of the canal in 2010. The Forth and Clyde canal connects to the Union Canal allowing passage all the way from Glasgow to Edinburgh, with plenty of facilities and docking points along the way. The towpath contributes to one of Scotland's long distance walking routes; the Forth and Clyde and Union Canal towpath route which is 6 sections and is 66 miles (106km) in total. The towpath along the Forth and Clyde Canal has recently been updated in sections to improve the path quality along the whole route.

The Forth and Clyde canal also provides the location for the very successful Kirkintilloch Canal Festival which is currently in its 16th year and continues to grow. The event has 4 main features: evening canal cruises; Get Active Saturday; Family concert and Fireworks on the Saturday evening; and a Sunday Gala day; though there are small events throughout the week all over Kirkintilloch. It is estimated that around 32,900 people attended the 2015 canal festival, providing an overall economic impact of £428, 845 to Kirkintilloch.

The Campsies http://www.thecampsies.co.uk/index.html

The Campsie Fells, better known as the Campsies, are a range of hills to the North of East Dunbartonshire making them a convenient 19km away from Glasgow City Centre. The hills are easily accessible via Lennoxtown, a quaint village with the hills looming over it. The range is a very popular walking and cycling range, as well as those on road trips, as there is a very popular car park up the Crow Road, and a road through the hills.

Antonine Wall http://www.antoninewall.org/

The Antonine Wall, once the most northern Frontier of the Roman Empire began work in AD 142 and was 60 km long. The site was given UNESCO World Heritage status in 2008 meaning it must be protected for future generations. The Wall was never actually made of stone, but rather various ditches and high layers of turf. Today, there is some great walking and cycling routes along the Wall, and several sites of historical importance along the route for example the remains of a Roman Bath House in Bearsden and Bar Hill, the highest fort on the Antonine Wall. In a report studying the socio-economic impact of the Antonine Wall, in East Dunbartonshire there are 21,733 people living along the wall which is 21% of the population, and 8,800 jobs.

Mugdock Country Park http://www.mugdock-country-park.org.uk/

Mugdock is located in both East Dunbartonshire and Stirlingshire with the visitor centre easily accessible from Milngavie town centre. In addition to the many walking and cycling routes around the park, there are numerous activities and things to do in the park. There is a garden centre, cafes and arts and crafts, as well as a full ranger service with activities for children and educational experiences. There are also trails and orienteering around the park, lochs and castles, woods and ponds throughout the huge park. Counters in the park show there to be around 600,000 visitors per year, though these counters are somewhat unreliable and the figure is estimated at closer to 1million. There is now an annual music festival that takes place in the park called Mugstock, with camping, food and drink stalls and other performances and events available for adults and children. There is a strategy for Mugdock Country for the period 2015-2020 which provides actions for improvement and cutting costs which will be considered in the development of the action plan for the Economic Development Strategy.

Golf Courses
http://eastduncouncil.maps.arcgis.com/apps/MapTour/index.html?appid=f8333d8e1c4e4f6e9de6bf283d0dabb6

The sport hails from 15th century Scotland so is an important part of Scotland's rich history. Many people come from different parts of the world to play golf in its originating country and East Dunbartonshire is in a great position to capitalise on this tourism opportunity because it is home to 14 different golf clubs which can suit all budgets, standards and abilities.

Cultural Assets https://www.edlc.co.uk/heritage-arts

Lillie Art Gallery

The Lillie Art Gallery was purpose built and opened in 1962, thanks to local banker and artist Robert Lillie, who left a lot of his own works and the capital to build the gallery. The gallery is located in Milngavie, admission is free and there are around 450 works of art in its collection.

The Auld Kirk Museum

Originally a church built in 1644 it was reopened in 1961 as Kirkintilloch's museum; the Auld Kirk is conveniently located next to Peel Park which the Antonine Wall goes through. The collection available at the museum reflects the local area and its rich history and roman significance. A report on the Antonine Wall shows that there are around 18,000 visitors per annum, with around 300 educational visits.

Trails and Tales

Trails and Tales is a 3 year arts and heritage learning programme which will engage artists with communities to explore local history and heritage. From 2014 to 2017, Trails and Tales are working with 11 towns and villages across East Dunbartonshire: Auchinairn, Baldernock, Bearsden & Westerton, Bishopbriggs, Kirkintilloch, Lennoxtown, Lenzie, Milngavie, Milton of Campsie, Torrance and Twechar.

Towns

East Dunbartonshire is an affluent area with good quality schools, and many residents of the area commute out of the authority for work. It has a mix of mid-sized towns and there are a few small villages and settlements to the north. The four larger towns are Bearsden, Milngavie, Bishopbriggs and Kirkintilloch, and although some towns and villages share many similarities, data from Ryden shows that there is a general east/west divide in terms of travel and shopping habits, as well as demographics as can be seen below.

Bearsden

Bearsden is located to the South West of East Dunbartonshire and borders Glasgow's West End. It is an affluent area with a population of 27,237 and is typically associated with good quality schools and houses of a high cost and quality. Residents tend to commute out of the authority for work and have a much higher than average income, with 47.5% of residents holding a degree or higher degree, though the actual percentage that go on to get one is probably higher since this figure shows everyone aged 16 and up, some of whom are not old enough to have a degree; and only 13.1% have no formal education.

Bearsden is a town where people are more likely to settle down with families or retire to which is evidenced by the unusually high home ownership of 92.1%, compared to only 3.2% in council or socially rented housing; and a very low amount of properties available for privately renting with only 4.7% of households falling into that category. 62.3% of households are inhabited by people that are married, with only 24.2% one person households and less than 1% is multi-person households; only 10.1% of households do not own a car.

The town centre has a range of retail, mostly independent retailers but some national retailers such as Marks and Spencer and Timpson. It also has a high number of cafes and restaurants considering its relatively small size and currently has 1 vacant unit (July 2017). Scotland's Towns Partnership states that there are 197 people per shop, which is quite a high number, suggesting a small retail base and rental values per square metre are between £198 and £500, the highest over the East Dunbartonshire towns.

Supermarket provision in Bearsden consists of a large Asda at Milngavie Road, the M&S Simply food in the town centre, a Lidl, a Co-operative, and a Scotmid; according to the Retail Capacity study survey 44.3% of Bearsden residents do their main food shop at the Asda in Bearsden; 23.1% at Tesco Milngavie, 9% at Morrisons Crow Rd in Glasgow; and 4.3% at M&S Milngavie. According to council counters in the town centre, footfall tends to be around 19,000 per month.

Milngavie

Milngavie borders Bearsden and has somewhat similar demographics though the affluence is more understated. The population is 12,948 and it is also a largely commuter town with more households on a higher income and a prevalence of private housing; 81.1% owning their home and 12.7% council or social rented. 40.1% have a degree or higher degree, although this holds the same caveat as above, and 18.4% have no education. Milngavie has a higher number of one person households with 31.1% but still quite a low proportion of people in multi-person household with 1.1% falling into this category; and there is lower car ownership than Bearsden with 19.4% not owning one.

Although the population is less than half of Bearsden, the town centre is much larger. There are 135 people per shop meaning there is a larger provision, yet there are fewer vacant units with 3 as of July 2017. Milngavie town centre or 'precinct' as it is known locally, is mainly pedestrianised with roads and car parks surrounding which can partially explain the difference in footfall in Milngavie than in the other towns. Using June 2017 as an example, footfall in Milngavie was over 135,000; around 30,000 more than Kirkintilloch and around 105,000 higher than Bearsden. Town centre counters are quite an unreliable method of counting as they are only positioned in one place so has the potential to wildly over or underestimate the numbers, but this still shows a considerably higher usage of Milngavie town centre considering it has the smallest population of all East Dunbartonshire towns.

Supermarket provision consists of a Tesco next to the town centre, a Marks and Spencer within the town centre, a Scotmid and a Waitrose close to the border with Bearsden; according to the Retail Capacity study survey 70.8% of residents do their main food shop at the Tesco; 15.4% at Asda Bearsden, 3.8% at the M&S, and 3.1% at Morrisons Crow Rd in Glasgow. This data is however prior to the Waitrose opening so it likely that some of Milngavie residents, and indeed Bearsden, will now shop there.

The town centre has a good mix of independent and national retailers; there are a good number of cafes but there is a small provision of bars and restaurants in the centre itself. This has an effect on evening economy and the town is much quieter in the evening. Rental value is between £134 and £269 per square metre so is about mid-value for the area as a whole. Milngavie Town Centre is the only place in East Dunbartonshire so far to have a Business Improvement District (BID). The Milngavie BID carries out a number of projects to improve, or attract people to the town centre with money raised via a levy on the member businesses. Successful projects implemented by the BID so far includes the installation of Wi-Fi in the town centre and an app, 'Our Buzz', advertising local businesses and events, an annual Classic Car show, and hosted their second successful Beer Festival in September 2017.

Bishopbriggs

Bishopbriggs is located to the south of East Dunbartonshire, bordering the north-east of Glasgow. It has a population of 22,870 and again, as is typical for the area, has residents with higher incomes that commute out of the authority for work. Residents are typically home owners, with 85.9% owned and only 7.1% council or socially rented likely showing a smaller population on a lower income. Bishopbriggs residents are not as highly educated than the residents of Milngavie of Bearsden with 28.4% holding a degree and 23.3% with no formal education. There is also less than 1% in multi-person households so it is likely a family orientated population, with 54.2% married and 27.9% in a one person household. It is not quite as reliant on private transport as the previous two towns with 20.5% not owning a car.

Bishopbriggs doesn't have a huge variety of retail available; national brands seem to be specialty such as Boots, Greggs, and Timpson and retail is centred around financial and professional services but there is no real clothing or shoe provision. There are 173 people per shop showing this lack of provision; however Strathkelvin Retail Park provides these types of retail albeit not in the town centre. There are a large number of restaurants and cafes within the town so the evening economy is quite lively. There are usually very few vacant units in the town, and there were 2 as of July 2017. Footfall is around 50,000 a month, but the counter in only on one side of the road and would miss anyone parking at the Morrison's and not walking down the middle of the high street so is likely quite underestimated.

Supermarket provision consists of the Morrison's in the town centre, a Tesco Express and an Asda further down Kirkintilloch Road. There are also a few places at the Strathkelvin Retail Park, such as an M&S. According to the Retail Capacity study survey 78.9% of residents do their main food shop at either the Morrisons or Asda in the town, and 11.3% go to Glasgow.

Kirkintilloch

Kirkintilloch lies to the East of the authority and has quite different demographics than the other 3 towns. It has a population of 19,689 but unlike the other towns it has mixed demographics and a fair mix of professional and non-professional residents. There are a much higher number of households living in council or other social rented accommodation, and 64.1% own their home which is 17% less than the next lowest percentage in Milngavie. Education statistics are lower in Kirkintilloch than the other towns with residents more likely to have no education (27.4%) than hold a degree (21.8%) and a much higher proportion of 31.1% do not own a car. Multi-person households is 1.1%, which is higher than the other towns but still low when compared to cities which are usually around 10%, or places with a bigger college or university presence. There is also a smaller difference between married people living together (39.6%) and people living alone (35.8%) implying it is not as common for people to move to Kirkintilloch with a family and commute elsewhere.

Kirkintilloch has a range of retail available with national brands such as New Look and Boots, as well as independent retailers and gift shops. However, the town is lacking provision for certain groups such as menswear. There are quite a few restaurants that have come in recent years, but quite a small number relative to the size of the town centre. There are also a high number of charity shops and services such as hairdressers in the area and less specialty retail.

Scotland's Towns Partnership shows that in Kirkintilloch there are 90 people per shop. This shows there is a large amount of retail space relative to the population which means less demand and can often mean businesses are more likely to fail than when there are more people to frequent them. This is reflected in vacancy rates for the town centre because as can be seen above, the other towns is usually very low, Kirkintilloch as of July 2017, has 29 empty units. Footfall is usually around 90,000 per month, but given the sheer length of the high street and the difference in provision in Cowgate and Townhead, this likely misrepresents the actual figure, but is still useful to show that it is still quite a busy high street for the population size.

Supermarket provision consists of a Tesco within the Regent Centre, a Sainsbury's at the edge of the town centre, a Lidl and a Scotmid. According to the Retail Capacity study survey 58.6% of residents do their main food shop at either the Tesco or Sainsbury's, 13.9% go to the Asda in Bishopbriggs and 9.1% go to Robroyston in Glasgow.

As mentioned before, residents of Bearsden and Milngavie are quite interdependent and tend to do most forms of food or convenience shopping within the two towns. Alternatively they are more likely to go to Glasgow's West End, but are unlikely to venture east to the other towns in the authority. Kirkintilloch residents will either stay put or use shops in Bishopbriggs, and Bishopbriggs is quite independent, with residents usually using the provision within the town itself. Demographics are fairly split, with Milngavie and Bearsden residents typically identifying with each other but not with the other side of the authority, and Bishopbriggs and Kirkintilloch are quite independent. This is possibly exacerbated by the public transport provision in the area, which make it difficult to travel across the authority but very easy to travel out.

Villages

East Dunbartonshire has a large rural area in addition to the larger villages and towns. Unfortunately, data is not often collected for the smaller villages and so it is quite difficult to gain an accurate picture of the economies of smaller places, particularly when there is little local business. Although smaller places like Balmore and Bardowie are important places and the Economic Development Strategy 2017-2020 is for the area as a whole, these smaller villages have not had a breakdown of data in this section due to the lack of availability.

Lennoxtown

See place section below

Lenzie

Lenzie is situated to the south of Kirkintilloch and is an affluent area with a population of 8,415. It is also a largely commuter town with more households on a higher income and a prevalence of private housing; 91.1% owning their home and 3.8% council or social rented. 42.9% have a degree or higher degree and 13.8% have no education. Lenzie has a low number of one person households with 31.1% and only 0.7% is in a multi-person household, meaning that it is typically a family-orientated town as 63.7% of the population is living with their spouse, and there is high car ownership with only 11.3% not owning one. There are 205 people per shop which suggests there is not an over-provision so shops are less likely to fail than in towns with fewer people per shop. There is a small town centre, though this is easily accessible as it is right next to the train station in Lenzie, which is conveniently on the Glasgow- Edinburgh line.

Milton of Campsie

Milton of Campsie is located to the north of Kirkintilloch and just east of Lennoxtown. It is another affluent town with a population of 3,889 and provides easy access to the Campsies. As is the case with the majority of East Dunbartonshire, it is a commuter town with more households on a higher income and a prevalence of private housing; 84.2% owning their home and 11.4% council or social rented. Residents tend to have less education than other parts of East Dunbartonshire with 29.7% holding a degree or higher degree and 20.5% with no education. There are a low number of one person households with 25.2%, and only 1% is in a multi-person household; 55.8% of the population is living with their spouse, and there is high car ownership with 14.9% not owning one. There are 556 people per shop which suggests there are very few shops in the town, and it is likely residents shop elsewhere.

Torrance

Torrance is situated to the east of Kirkintilloch and to the north of Bishopbriggs. There is a population of 2,375 and again is primarily a commuter town with more households on a higher income and a prevalence of private housing; 86.3% own their home and 7.9% council or social rented. 35.6% have a degree or higher degree and 16.1% have no education. Torrance has a very low number of one person households with 21.6% and only 0.3% is in a multi-person household, meaning that it is an unlikely setting for young people in flat-shares and is typically a family-orientated town as 61.7% of the population is living with their spouse. There is very high car ownership with only 9.7% not owning one though there are good transport links with Glasgow City Centre. There are 238 people per shop which suggests there is not a wide provision so residents are likely to need to travel to neighbouring towns to shop which is probably the reason for the high car ownership.

Twechar

Twechar sits on the North East of the boundary with North Lanarkshire about 4 miles East of Kirkintilloch. It is a relatively deprived town with a prevalence of social housing and will be included in the forthcoming Locality Plans as part of the Local Outcome Improvement Plan, and will be a new 'Place' Location (see below). It has a population of 1,161 and there are more people living in council or social rented accommodation than there are living on their own; 42.7% own their home and 52.8% council or social rented. Education levels are far lower than the other towns and villages in the authority with only 11.5% holding a degree or higher degree and 41.9% with no formal education. There are similar proportions of people living in one person households as living with their spouse with 32.8% in a one person household and 40.7 with their spouse, and only 0.8% is in a multi-person household. There is low car ownership in Twechar with 34.2 having no car meaning there is a high reliance on public transport, though public transport links within the authority are minimal due largely to lack of demand, it is well connected to Kilsyth in North Lanarskshire. There are 580 people per shop which based on the population means there are only 2 shops in Twechar, so the town will be heavily reliant on other towns for shopping needs and based on the low car ownership and poor transport links to East Dunbartonshire, it is likely that Twechar residents mainly go to Kilsyth for convenience shopping.

'Place'

The 'Place' approach is a method of community planning used by the East Dunbartonshire Community Planning Partnership to provide a holistic approach to improving opportunities, health, crime rates etc. in the authority's most deprived areas. The Scottish Index of Multiple Deprivation (SIMD) as well as local data was used to identify the areas with the most need for the intensive approach, and the identified areas are Auchinairn, Hillhead, and Lennoxtown. In SIMD 2012, 3 (0.3%) of the 976 datazones in the 15% most deprived datazones in Scotland were found in East Dunbartonshire, compared to 4 (0.4%) in 2009, 3 (0.3%) in 2006 and 4 (0.4%) in 2004. In 2009 three of the zones were found in Hillhead and one was found in Lennoxtown and as can be seen from the pattern of going between 3 and 4 datazones, these areas are consistently within the most deprived in Scotland. These places will have Locality Plans in place by 2018 in order to coordinate community planning in the areas in a holistic manner.

Auchinairn

Auchinairn is one of the 25% most deprived areas nationally, which is very deprived in relation to the region. It is within the 20% most deprived areas in a lot of areas such as income and employment. The 2011 Census identifies that the current population of Auchinairn is 5,059, an increase of around 12% since the 2001 Census. The area also has less of a problem with an ageing population, with a higher percentage of children and 16-64 year olds than East Dunbartonshire collectively, and has seen a decrease in those aged over 65 between the two censuses. 23.3% of households are either council or socially rented, which is far higher than the proportion for the area, of 12% in total.

Dependence on out of work benefits is higher than the rest of the authority and of those who reported that they were unemployed 2.5% reported that they were long term unemployed. The first area to take part in the Place Approach was Hillhead, due to deprivation being more significant there, but there is work being done in Auchinairn to provide a similar approach. The community planning partnership held a joint resourcing workshop for Auchinairn in February 2015 to pull out ideas and plans for future projects, with outputs relating to community safety, employability, and health and wellbeing. In 2017, there was more in-depth consulation in relation to the forthcoming Place Plans.

Lennoxtown

Lennoxtown is within the 15% most deprived areas in Scotland. The population in the 2011 census was 4,094 which again was an increase from the last census, of 8% compared to East Dunbartonshire collectively having a population decrease of 3%. The demographics in Lennoxtown differ from East Dunbartonshire in the same ways as they do in Auchinairn; a higher percentage of children and people 16-64, and a lower percentage of those over 65. However, although there is a smaller proportion over 65, this percentage has still risen between the censuses. 28.5% of households are council or other socially rented, more than double the percentage for East Dunbartonshire. Lennoxtown is also the most deprived area in the authority in terms of crime.

The Council, with the help of Government funding, held a charrette in Lennoxtown in March 2016. The consultants that ran the charrette have since produced a report outlining several suggestions for actions to improve the town. This report will be combined with the work being done on the forthcoming Place Plans in order to have a robust strategy in terms of regeneration and social outcomes.

Hillhead

Hillhead is the most deprived datazone within East Dunbartonshire, and ranks within the 5% most deprived areas in Scotland. SIMD also provides information on specific types of deprivation and shows Hillhead to be the most deprived area in East Dunbartonshire in terms of income, employment, health, education and housing. It is significantly deprived in terms of the country as a whole as well, being among the 2% most employment deprived, 3% most income and health deprived, and 8% most crime deprived.

Through the Place approach, the Community Planning Partnership has a Joint Resourcing Plan, which underwent several streams of community engagement and partnership self-evaluation leading to a number of interventions and programmes. The themes of the plan are working with families; creating a safer and better environment for the people of Hillhead; and community development. Each theme has set out actions in order to achieve improved outcomes for the community of Hillhead. These will all be updated in relation to the forthcoming Place Plan.

Places Conclusions

Tourism in East Dunbartonshire does not appear to be reaching its full potential; the area has a lot to offer but the area is not very well-known. There is a very successful canal festival every year but there are a lot of assets that are under-utilised; if scenery and culture are the primary reasons that people visit Scotland, East Dunbartonshire is rich with both and more should be done to compete for its full share of the tourism sector.

The town centres in the area all have unique issues, for example Bearsden has a lot of restaurants but few retail stores and Milngavie has a lot of independent retailers but few restaurants and each town has a low number of national retailers to draw people in. Since each town has separate issues to address they should be looked at and planned for separately. Some of the villages are more independent than others, though most rely on neighbouring towns for shopping and facilities. The 'place' approach has identified the most deprived areas in East Dunbartonshire and is looking at addressing the issues of each separate place in a complete approach and this should be adopted for all places.

Final Conclusions

East Dunbartonshire is seen as an affluent area with residents taking advantage of the suburban scenery and convenient proximity to cities, with many typically commuting out of the authority for work. Residents are healthy and tend to live longer than those in other authorities resulting in an ageing population. The business base in East Dunbartonshire is populated with smaller businesses and there is a lot of retail, but each town seems to be lacking variety, and the area has a lot to offer in terms of tourism and natural assets, but they are underutilised and there are not as many visitors compared with other authorities with a similar breadth of assets.

As a result of the information that has been collected in this background report, a number of objectives to be achieved for the East Dunbartonshire economy can be concluded:

- Address the existing inequalities for example the discrepancies between earnings for residents and local employees, and men and women; and the areas of multiple deprivation
- Build on our knowledge of the business base, as well as the services that are on offer from various organisations operating in the area so that resources can be targeted where they are needed.
- Increase the business base by attracting inward investment and helping existing businesses to grow and access new markets, which will also increase the employment on offer helping to increase earnings.
- Utilise the tourism attractions more by exploring different options for using and marketing them; whether this is through a BID or cooperative, by having more events or more uses for assets i.e. canal activities etc.
- Investing in the town centres by making them more attractive and accessible, with good quality green space and public realm so that people want to spend time in them.
- Encouraging more uses for the town centre, such as town centre living, more community facilities, and variety of offer.
- Combining the resources of public sector and representative agencies into equal responsibility partnerships, thus reducing duplication of service and being able to pool and target resources to benefit the area as a whole.