



# CHORD Programme Socio – Economic Baseline Dunoon Locality

Report for Argyll and Bute Council

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## Executive Summary

This executive summary provides a summary of the socio-economic baseline position within Dunoon and sets the context within which the longer term impact of the proposed CHORD projects will be measured.

The baseline provides a current and retrospective overview of the Dunoon area, which will allow identification of key changes that occur in the future. These changes will be used to measure the impact of the CHORD Programme both quantitatively and qualitatively through the perception surveys.

## Population

The total resident based population in Dunoon is approximately 13,200, representing 15% of the entire Argyll and Bute population. Within the locality there is a higher proportion of people aged 65 and over and a lower proportion of working age people when compared with the wider area.

Over the period 2001 – 2008, there was a 5% overall increase in the resident population, most notably within the working age group – which experienced a decrease across the region more widely.

## Employment Base

The key points emerging from analysis of the employment base are:

- Dunoon has a workplace based employment level of 5,600, representing 15% of the wider employment base;
- the key employment sectors with Dunoon are ‘public administration, education & health’ and ‘distribution, hotels and restaurants’; and
- Dunoon has a significant employment base in ‘public administration, education & health’, representing over half of total employment (53%), more than 20% points greater than the proportion for Scotland as a whole.

The key changes to arise within the employment base 2005 – 2008 are:

- there has been considerable change in employment within the Dunoon locality, when compared with Argyll and Bute and Scotland, particularly within the ‘public administration, education and health’, ‘manufacturing’ and ‘construction’ sectors;

- overall, the Dunoon localities' employment base increased by 30%, this is significantly greater than the increases at the Argyll and Bute and Scotland levels, 5% and 1% respectively; and
- 'public administration, education and health', a key sector for Dunoon in terms of employment, reported the greatest absolute increase (an increase of approximately 1,100 jobs). This significant increase is within the general public services sector<sup>1</sup>;

## Business Base

In 2008 there were approximately 450 businesses in the Dunoon locality, representing 11% of the total Argyll & Bute business base – this is smaller than the employment base, indicating a number of larger (potentially public sector) employers:

- the business base in the Dunoon locality is broadly similar to Argyll and Bute and Scotland with 'distribution, hotels & restaurants' representing the largest proportionate share; and
- the Dunoon locality whilst having a large proportion of employment within 'public administration, education & health', has a proportionately small business base, indicating a number of large employers.

The key changes to arise within the business base 2005 – 2008 are:

- the overall net increase in the business base is 5%, indicating that the Dunoon locality has remained buoyant with only one sector experiencing a decrease - distribution, hotels & restaurants' (14 businesses, 8%). This is set against an increase in employment within this sector which represents a shift to fewer but larger businesses; and
- if we compare the changes in the employment base, we can see that the employment base is increasing at a significantly faster rate than the business base, reflecting growth within the existing business base.

The CHORD Programme has the potential to help support the regional business base, and act as a catalyst for leveraging private investment as well as small start-up businesses – particularly those aligned with tourism.

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<sup>1</sup> This is likely accounted for by a central government service office e.g. Inland Revenue, Job centre being registered within Dunoon although the employees will not necessarily be located within the Dunoon area. The increase of 1,110 jobs will significantly overestimate the actual workplace employment increase in Dunoon.

## Claimant Count

The proportion of residents claiming JSA in the Dunoon locality is consistently higher than in Argyll & Bute and Scotland and currently (December 2009) stands at 5%.

The number of claimants has been increasing over a number of years, which is symptomatic of the economic recession. By moving forward with the CHORD Programme, the estimated long term economic benefits that this has the potential to generate is anticipated to sustain and create employment opportunities, reducing the number of claimants. It is likely, however, that in the shorter term, claimant count unemployment will rise further with the economic downturn.

## Retail and Leisure Gross Value Added

A key objective of the wider CHORD programme is to raise the competitiveness of the local economy and in particular the service sector.

The current industrial output of the service sector in terms of GVA per annum is estimated at £14.9m. The proposed projects, particularly the development of the pier and accommodation property have the potential to provide a boost to the service sector through supporting more jobs in the service and tourism industries.

## Property

A key objective for the projects is to improve the perception of Dunoon as a place to invest and live/work.

According to Health Check data provided by Argyll & Bute Council, there are 151 units in Dunoon town centre, of which 16 are vacant. Retail businesses account for 80 units and leisure 25 units. Of the vacant units in the town centre, nine were previously occupied by retail operators and four by leisure operators.

The planning data identifies that there has been no commercial development within the Cowal area since 2005. The CHORD Programme hopes to boost activity in this area.

The number of households in Bute and Cowal is forecast to experience a significant increase up to 2010 of 330 new residential units. This is set against population projections which show an increase in the resident base population of Bute and Cowal by 2020.

Since 2005, there have been planning applications submitted for just over 100 residential units across Bute and Cowal, with over half these units complete – a possible indication that the residential development market in the local area has not been as adversely affected as some areas within Argyll and Bute.

Further, as a longer term impact of the proposed projects to regenerate Dunoon the project's could have further spin off impacts for the wider locality through demonstrating the area as a viable business location and leveraging further development activity.

## Tourism Visitor and Day Market

Dunoon is considered within the wider catchment area for Loch Lomond and the Trossachs National Park. Data shows that Dunoon attracted 84,600 staying visitors in 2006/07 and contributed £4.3m to the local economy.

Overall tourism (overnight and day visitors) contributed £6.3m to the local economy and supports 94 gross jobs. Dunoon accounts for 3% of the total spend in the wider Loch Lomond and the Trossachs National Park area.

Attracting visitors to the town and improving the external perceptions is a key over-arching objective of the Programme. Through delivery of CHORD projects there is an opportunity to support this, which could potentially generate a boost in the number of tourism visitors which in turn could help support a greater number of jobs in the town.

# 1. Socio-Economic Baseline

## 1.1 Introduction

This report identifies the socio-economic baseline position within the Dunoon locality and sets the context for the delivery of the place-making project as part of the wider CHORD Programme. The baseline provides a current and retrospective overview of the area, which will be used to identify changes in activity.

Establishing a baseline position is important in measuring the impact that the proposed project will have on the socio-economic environment and its contribution to wider CHORD/Argyll and Bute Council targets.

The project proposed to be delivered through the CHORD Programme is the Dunoon Waterfront project which comprises the construction of a number of inter-related developments:

- the reclamation of approximately 1.21ha (3 acres) from the sea;
- the replacement of the existing listed pier and pier building, and the creation of a new pier and harbour, capable of accommodating a transit marina;
- the development of a new structure to replace the Queens Hall;
- the remediation of land for future waterfront development, such as a hotel; and
- related environmental improvements and road re-alignment.

The baseline position is considered against the Dunoon and 'hinterland' spatial area. The definition is based on an assessment of the catchment area for each town and where direct project impacts are likely to be generated.

For presentational purposes, the area will be referred to as the Dunoon locality within the report. Where appropriate, we have drawn comparisons with Argyll & Bute and Scotland.

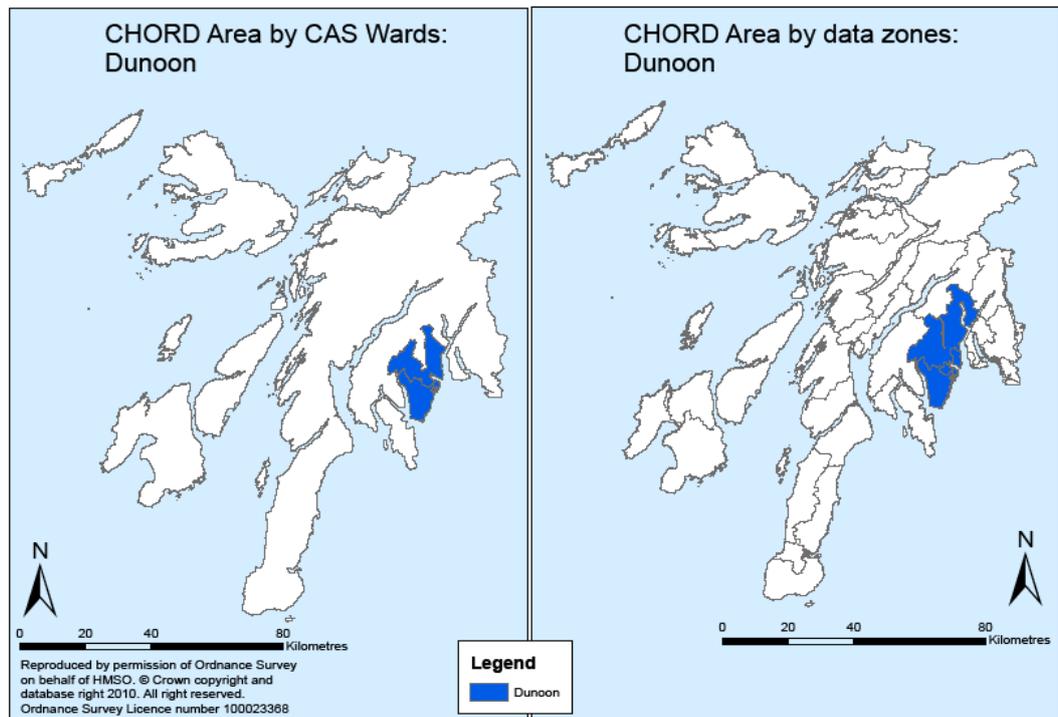
For the analysis, the Dunoon locality has been defined using the following Census Area Statistics (CAS) 2003 wards:

- Ardenslate;
- Auchamore and Innellan;
- Holy Loch;
- Kirn and Hunter's Quay; and

- Milton.

Figure 1.1 provides a spatial breakdown of the five towns and their ‘hinterland’ using ward and datazone definitions<sup>2</sup>.

**Figure 1.1: CHORD Programme Spatial Breakdown – Dunoon Locality**



Source: Argyll and Bute Council

The baseline provides information on the following socio-economic indicators:

- population;
- employment;
- business base;
- claimant count;
- retail/leisure GVA;
- property; and
- day visitor market.

<sup>2</sup> Datazone definitions are used to analyse population and demographics. Please note that the datazone and ward definitions do not match exactly, from this a ‘best fit’ approach is adopted.

## 1.2 Population

**Table 1.1** reports the current (2008) population broken down by age categories - dependent children, working age adults and retired people. Note: these figures are population estimates.

**Table 1.1: Population Estimates 2008**

	Total	0-15	16-64	65+
Dunoon	13,186	16%	60%	24%
Argyll & Bute	90,500	17%	63%	21%
Scotland	5,168,500	18%	66%	17%

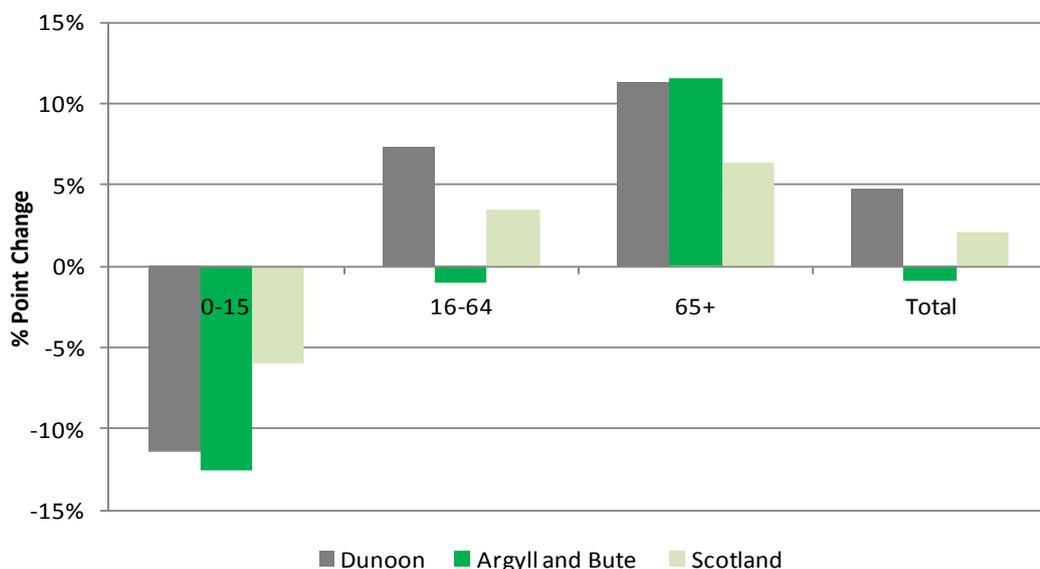
Source: GRO(S)

The table shows that:

- the Dunoon locality has a total population of approximately 13,000, which represents 15% of the total Argyll and Bute population; and
- the area has a lower proportion of working age residents (60%) and a consequently higher proportion of retired residents (24%) compared to Argyll & Bute (21%) and Scotland (17%).

**Figure 1.2** reports the change in population from 2001 to 2008 and shows that overall, the Dunoon locality experienced a 5% increase in population, significant when compared to a decrease in Argyll and Bute (-1%) and an increase at the Scotland level (2%).

**Figure 1.2: % Point Change in Population 2001 - 2008**



Source: GROS

Most notably, the working age population has increased compared to a decrease at the Argyll & Bute level. This is encouraging given the comparatively smaller proportion of working age residents in the Dunoon locality. The retired age population has increased in line with the increase at the regional level, 11% and 12% respectively, but significantly higher than the Scottish average (6%).

### 1.3 Employment Base

The Annual Business Inquiry (ABI) provides data on workplace-based employment<sup>3</sup>.

**Table 1.2** shows the employment base broken down by broad industrial sector. In 2008 the Dunoon locality had workplace based employment of approximately 5,500 people, representing 15% of the total employment in Argyll & Bute.

**Table 1.2: Employment by Broad Industrial Sectors 2008**

	Dunoon	Argyll & Bute	Scotland
Agriculture and fishing	1%	3%	2%
Energy and water	1%	1%	2%
Manufacturing	1%	4%	9%
Construction	7%	6%	6%
Distribution, hotels and restaurants	20%	24%	22%
Transport and communications	4%	5%	5%
Banking, finance and insurance etc	9%	12%	19%
Public administration/education/health	53%	39%	30%
Other services	4%	5%	5%
<b>Total</b>	<b>5,562</b>	<b>37,260</b>	<b>2,420,441</b>

Source: ABI

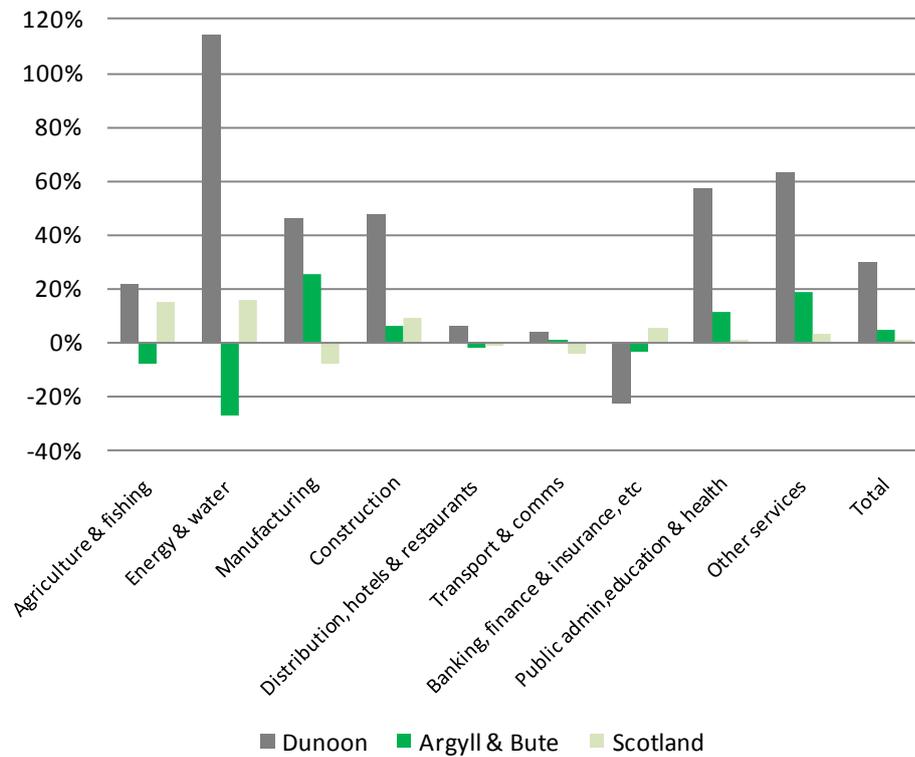
The key points to note are:

- the key employment sectors across all three areas are ‘public administration, education & health’ and ‘distribution, hotels and restaurants’; and
- Dunoon has a significant employment base in ‘public administration, education & health’, representing over half of total employment (53%), more than 20% points greater than the proportion for Scotland as a whole. As a consequence the Dunoon locality has a lower proportion of employment in the ‘manufacturing’ and ‘banking, finance and insurance’ sectors.

<sup>3</sup> The ABI is survey based and as such records the number of employees registered within an area and does not account for employees that work off-site.

**Figure 1.3** details changes in the employment base by industrial sector (2005 - 2008).

**Figure 1.3: Change in Employment 2005-2008**



Source: ABI

The key points to note are:

- there is considerable change in employment within the Dunoon locality, when compared with the Argyll and Bute and Scotland averages, particularly within the ‘public administration, education and health’, ‘energy and water’, ‘manufacturing’ and ‘construction’ and ‘other services’ sectors;
- overall, the Dunoon localities’ employment base increased by 30%, significantly greater than the increases at the Argyll and Bute and Scotland levels, 5% and 1% respectively;
- ‘public administration, education and health’, a key sector for Dunoon in terms of employment, reported the greatest absolute increase (an increase of approximately 1,100 jobs). This significant increase is within the general public services sector<sup>4</sup>;

<sup>4</sup> This is likely accounted for by a central government service office e.g. Inland Revenue, Job centre being registered within Dunoon although the employees will not necessarily be located within the

- ‘banking, finance and insurance’ decreased by -23%, (143 employees), whilst only small fluctuations occurred at the Argyll and Bute (-4%) and Scotland (5%) levels; and
- the ‘energy & water’ sector experienced the greatest proportionate increase (114%). However, in absolute terms the increase is small (16 employees).

## 1.4 Business Base

The business base measures the number of registered businesses within an area. **Table 1.3** details the number of businesses broken down by broad industrial sector.

In 2008 there were approximately 450 businesses in the Dunoon locality, representing 11% of the total Argyll & Bute business base, set against a 15% share of both the employment and population base of the wider local authority area. Looking at the employment base we can see that the Dunoon locality has a number of larger employers (proportionately smaller business base set against a proportionately larger employment base).

**Table 1.3: Businesses by Broad Industrial Sector 2008**

	Dunoon	Argyll & Bute	Scotland
Agriculture and fishing	4%	8%	3%
Energy and water	1%	1%	0%
Manufacturing	4%	5%	6%
Construction	12%	10%	10%
Distribution, hotels and restaurants	35%	32%	29%
Transport and communications	4%	6%	4%
Banking, finance and insurance etc	18%	17%	28%
Public administration/education/health	15%	13%	11%
Other services	8%	8%	8%
<b>Total</b>	<b>457</b>	<b>4,203</b>	<b>181,470</b>

Source: ABI

The table shows that:

- with a few exceptions, the business base in the Dunoon locality is broadly similar to Argyll and Bute and Scotland;
- the key sector in terms of number of businesses across all three areas is ‘distribution, hotels & restaurants’; and

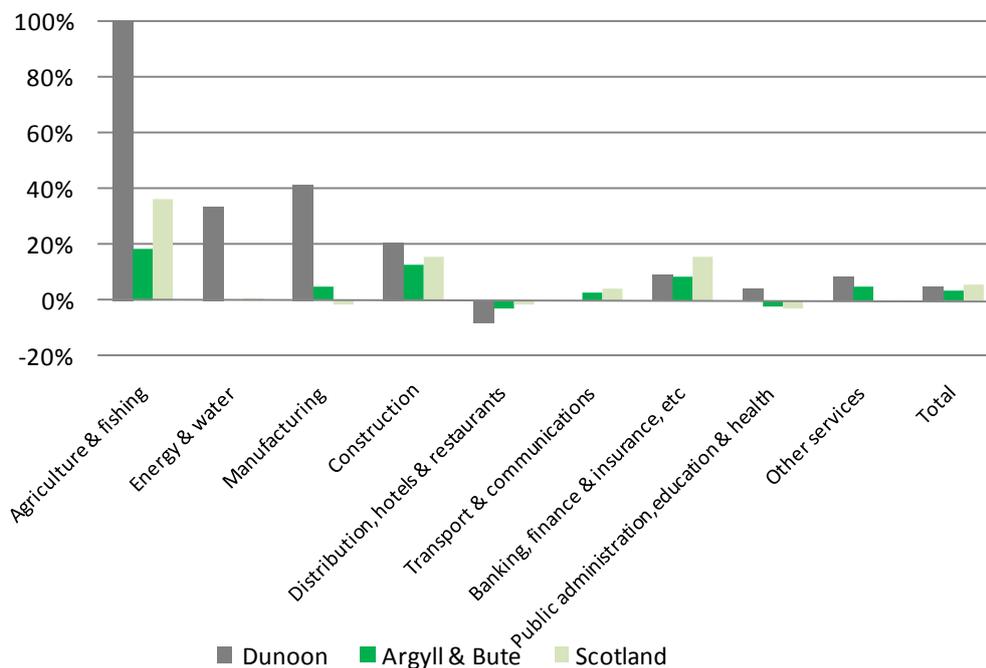
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Dunoon area. The increase of 1,110 jobs will significantly overestimate the actual workplace employment increase in Dunoon.

- the Dunoon locality whilst having a large proportion of employment within ‘public administration, education & health’, has a proportionately small business base, indicating a number of large employers.

Figure 1.4 shows the change in the number of businesses between 2005 and 2008.

Figure 1.4: Change in Businesses 2005-2008



Source: ABI

The figure shows that:

- the overall increase in the business base of 5% is in line with the increases of 3% and 5% at the Argyll and Bute and Scotland levels respectively;
- the business base within the Dunoon locality has remained buoyant with only one sector experiencing a decrease - distribution, hotels & restaurants’ (14 businesses, 8%). This is set against an increase in employment within this sector which represents a shift to fewer but larger businesses;
- within the Dunoon locality ‘agriculture & fishing’ increased by 100%, however, the absolute change in value is small (8 businesses); and

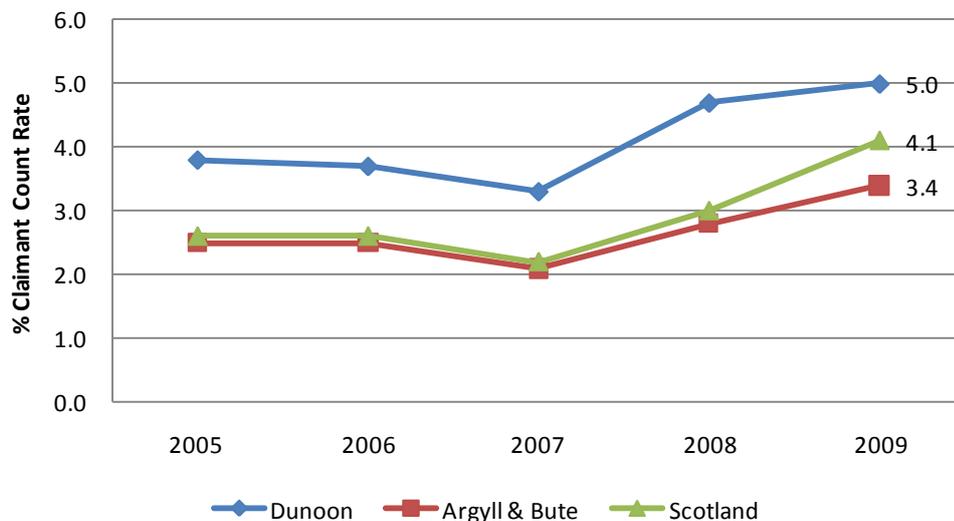
- if we compare the changes in the employment base, we can see that the employment base is increasing at a significantly faster rate than the business base, reflecting growth within the existing business base.

## 1.5 Claimant Count

This section reviews residence-based unemployment benefit claimants, drawing from claimant count data. The claimant count records people that have registered for Job Seekers Allowance (JSA). Of all the various socio-economic indicators, this provides the most up-to-date data and is therefore a good reflection of current economic conditions.

**Figure 1.5** details the claimant count rate for the period December 2005 to 2009 for the Dunoon locality and draws comparison with Argyll & Bute and Scotland.

**Figure 1.5: Claimant Count 2005-2009**



Source: Claimant Count, taken from NOMIS and based on seasonally adjusted annual average with a reference date of December

The figure shows that the proportion of people claiming JSA in the Dunoon locality has been consistently greater than in Argyll & Bute and Scotland over the past five years and currently stands at 5%. Between 2007 and 2008, the area experienced a sharp rise (1.4% points) compared to 0.7% points and 0.8% points respectively.

The increases in working age population and employment base coupled with an increasing number of claimants indicates that a number of people commute into the Dunoon locality to work but do not reside in the area.

## 1.6 Retail and Leisure Gross Value Added

For the Dunoon locality a key objective of the proposed CHORD project is to raise the competitiveness of the local economy and in particular the service and tourism sectors. In order to provide a baseline for this, we have reviewed the Gross Value Added (GVA) per annum generated by the 'retail' and 'hotels and restaurants' sectors.

Gross Value Added (GVA) is a measure of the value of goods and services produced before allowing for depreciation or capital consumption<sup>5</sup>. It measures the income generated by businesses after the subtraction of input costs but before costs such as wages and capital investment is paid prior to arriving at a figure for profit.

There is no data available on GVA per employee for 2008 and we have therefore estimated this based on the most recent data (2007) for the 'retail' and 'hotel and restaurants' sector<sup>6</sup> for the Argyll and Bute local authority. Over the period (2005-07) the average GVA per employee decreased and we have therefore assumed that in 2008 the average GVA per employee in Argyll and Bute for the 'retail' and 'hotel and restaurants' sector is £16,718<sup>7</sup> (representing a marginal decrease from 2005).

Taking account of the change in employment across these sectors within Dunoon from 2005-2008, the total GVA output from the 'retail' and 'hotel and restaurants' (service) sector increased by £0.6m, based on an overall increase in employment (4%) set against a marginal decrease of the average GVA per employee. The current industrial output of the sectors in terms of GVA per annum is estimated at £14.9m for the Dunoon locality.

It should be noted that the 'tourism' sector<sup>8</sup> is broader than just the 'retail' and 'hotels and restaurants' sector. Across Argyll and Bute 'tourism' employment accounts for 15% of the total employment base and generates GVA of £74.1m per annum, representing 2% of the total annual Scottish 'tourism' GVA.

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<sup>5</sup> Gross Value Added (GVA) is equivalent to Gross Domestic Product (GDP) at basic prices.

<sup>6</sup> Data taken from Scottish Annual Business Statistics  
<http://www.scotland.gov.uk/Topics/Statistics/16170/ServBroad>

<sup>7</sup> Please note, the estimated average GVA per employee value for 2008 is based on the most recent figure (2007) and inflated using RPI to reflect 2008 prices.

<sup>8</sup> Tourism-related figures are constructed from the following Standard Industrial Classification (SIC) codings: SIC55.1-55.4 / SIC63.3 / SIC92.5-92.7. Data taken from  
<http://www.scotland.gov.uk/Topics/Statistics/16170/Tourism-related>

## 1.7 Property

This section reports the total number of retail and leisure operators in Dunoon town centre based on the 2009 Health Check data provided by Argyll & Bute Council. A key objective for the CHORD Programme is to improve the perception of Dunoon as a place to invest and live/work. A positive change in the number of retail and leisure operators will help to identify any impact that the two proposed projects have in attracting commercial operators to the area.

In addition it reviews the number of residential and commercial planning applications submitted for planning consent and building notifications completed.

### Town Centre Operators

**Table 1.4** reports the number of commercial properties in Dunoon and shows the breakdown between retail and leisure operators.

**Table 1.4: Town Centre Operators**

	Dunoon
<b>Total Units</b>	151
<b>Total Vacant Units</b>	16 (11% of total units)
<b>Retail Units</b>	80
<b>Vacant Retail Units</b>	9(56% of vacant units)
<b>Leisure Units</b>	25
<b>Vacant Leisure Units</b>	4 (25% of vacant units)

Source: Argyll & Bute Council Health Check

According to Health Check data, there are 151 units in Dunoon town centre, of which 16 are vacant. Retail businesses account for 80 units and leisure 25 units. Of the vacant units in the town centre, nine were previously occupied by retail operators and four by leisure operators.

### Commercial and Residential Planning Applications

**Table 1. 5** presents data on the number of, type and value of residential and commercial planning applications submitted for approval, and development completions notified. The data has been provided by Argyll and Bute Council and identifies changes in development activity and (or) interest in the Dunoon locality.

**Table 1.5: Business Space Planning Applications (2005 – 2010)**

	Business Space		
	Not started	Started	Complete
Mid Argyll, Kintyre and the Isles	7 units	0	1 unit
Bute	-	-	2 units
Cowal	-	-	-
Lorn	1 unit	26 units	8 units
Helensburgh and Lomond	1 unit	-	-

Source: Argyll and Bute Council

The planning data identifies that there has been no commercial development within Cowal since 2005.

### Residential Accommodation

Information for the residential housing market is based on household projections and planning data.

**Table 1.6** shows the Household projections for the Bute and Cowal area based on the GRO(S) population forecasts.

**Table 1.6: Household Projections**

Household projections	Argyll and Bute	Bute and Cowal
2005	40,769	10,739
2006	41,093	10,854
2007	41,123	10,900
2008	41,154	10,951
2009	41,204	11,010
2010	41,263	11,068

Source: Housing Topic Paper, POL 210, Argyll and Bute Council

The overall number of households in Bute and Cowal is forecast to increase by approximately 330 households, 3% over the period 2005 - 2010. This is compared with an estimated increase of 1.2%, approximately 500 houses across Argyll and Bute.

Looking forward, the population forecasts (up to 2020) estimate an increase in the Bute and Cowal population, with the number of households likely to rise to approximately 11,715, an increase of around 700 from 2010. During this period, the number of households across Argyll and Bute is anticipated to increase by another 500 to approximately 41,750.

**Table 1.7: Residential Accommodation Planning Applications (2005 – 2010)**

	Housing		
	Not started	Started	Complete
Mid Argyll, Kintyre and the Isles	304 units	6 units	10 units
Bute	41 units	-	12 units
Cowal	76 units	-	47 units
Lorn	64 units	43 units	126 units
Helensburgh and Lomond	211 units	-	54 units

Source: Argyll and Bute Council

Since 2005, 47 new residential units have been completed with a further 76 units granted planning permission within Cowal.

## 1.8 Tourism Visitor and Day Market

Dunoon (core town) is considered within the wider catchment area for Loch Lomond and the Trossachs National Park. A recent report<sup>9</sup> identifies a number of tourism and day visitor baseline statistics for the area, reported in **Table 1.8**.

**Table 1.8: Tourism and Day Visitor Baseline Statistics 2007**

Indicator	Dunoon
Number of bed spaces	296
Number of staying visitor days	84,607
Number of VFR days (Visiting Friends & Relatives)	26,009
Average length of stay	4.3
Average expenditure per person per day	£51.19
Total expenditure by staying visitors	£4.3m
Associated GVA	£1.7m
Associated direct employment	94
Number of day visits	72,000
Total expenditure of day visits	£2m
Total tourism expenditure inc day visits	£6.3m

Source: SQW Consulting

The data shows that Dunoon attracted 72,000 day visitors in 2006/07 and contributed £2m to the local economy. Overall tourism (overnight and day visits) contributed £6.3m to the local economy and supports 94 gross jobs. Dunoon accounts for 3% of the total spend in the wider Loch Lomond and the Trossachs National Park area.

<sup>9</sup> Tourism Destination Baseline Study to inform Scottish Enterprise Tourism Framework for Change (January 2008) SQW Consulting.

The day visitor market i.e. potential day visitor catchment area is considered within our assessment. Attracting visitors to the town and improving the external perception of the town is a key over-arching objective. Below we provide a brief overview of the socio-economic composition of this potential market.

Please note, the day visitor market catchment area is defined roughly as locations within a 1.5 hour drive time and includes the following local authorities:

- Argyll and Bute;
- East Dunbartonshire;
- Glasgow;
- Inverclyde;
- North Ayrshire;
- Renfrewshire; and
- West Dunbartonshire.

We have provided a brief snapshot of the likely catchment area for the Dunoon/Argyll and Bute day visitor market. The key indicators for the catchment area are:

- the average gross weekly wage ranges from £426 - £553, the Scottish average is £472 (NOMIS);
- total catchment population of 1.26 million, broken down (GROS):
  - 0-15 years (17%);
  - 16-64 years (67%);
  - 65+ years (16%); and
- 45% have no access to private transport compared with 34% at the Scotland level (Census 2001).

Further, we have provided a list of other key attractions within the West of Scotland day visitor market. Please note this is not an exhaustive assessment and is used to set the context of the type of attractions/facilities within the West of Scotland that are likely to attract day visitors<sup>10</sup>:

- Argyll and Bute area:

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<sup>10</sup> Information on the most popular tourist destinations is provided through the Visitor Attraction Monitor, VisitScotland 2008. We have not included the top tourist attractions in Glasgow within our assessment as they are considered to have a geographic reach outwith the West of Scotland day visitor market and represent an inappropriate comparator

- The National Park Gateway – Loch Lomond
- Isle of Bute Discovery Centre
- Inveraray Jail
- Inveraray Castle
- Loch Fyne Oyster Bar
- Luss/Arrochar
- Mount Stuart
- Queens Hall
- Iona Abbey & St Columba Centre (Mull), Isle of Iona
- Benmore Botanic Gardens, Dunoon
- Oban War and Peace Museum, Corran Esplanade, Oban
- North Ayrshire area:
  - West Kilbride Craft Town
  - Vikingar – Largs
  - Eglinton Country Park Visitor Centre – Irvine
  - Scottish Maritime Museum - Irvine
- West Dunbartonshire area:
  - Loch Lomond Shores
  - Auchentoshan Distillery
- Inverclyde area:
  - Gourock outdoor swimming pool
  - Quarriers Village
  - Mclean Museum and art gallery
  - Newark Castle
- Renfrewshire:
  - Paisley museum and art gallery
  - Paisley Abbey.

## Appendix A: Data Sources

This appendix provides a list of all the data sources used within the baseline assessment:

### Population:

- Scottish Census 2001 (SCROL); and
- General Register Office Scotland (GROS), 2008 small area statistics based on datazone definitions for Dunoon (S01000741, S01000742, S01000743, S01000744, S01000745, S01000746, S01000747, S01000748, S01000749, S01000750, S01000752, S01000754, S01000756, S01000757, S01000759, S01000785, S01000800).

### Employment

- ABI broad industrial sector data sourced from NOMIS. Data is survey based (with September being the reference date) and collected annually and reported in December for the previous year i.e. the 2008 ABI statistics used within the assessment were published in December 2009. The data source does not cover self employment.

It should be noted that a number of Standard Industrial Classification codes (SIC) were discontinued after 2005 due to three key changes to how the data is collected and presented:

- change in reference date from December to September
- use of Business Register Survey data within the ABI/1 results
- change to the minimum domain methodology

This resulted in Argyll and Bute reporting approximately 1,300 less employees on a like for like basis between 2005 and 2006.

For future reporting, discontinuities with the data source should be monitored. For more detail, a link to the 2006 explanatory document is provided

<https://www.nomisweb.co.uk/articles/news/files/ABI2006discontinuities.doc>

### Business Base

- ABI broad industrial sector data is sourced from NOMIS. Data is survey based and collected annually and updated in December for the previous year i.e. the 2008 ABI statistics used within the assessment were published in December 2009.

### Claimant Count

- Claimant Count data is taken from NOMIS based on JSA claimants reported through the DWP. Data is taken as the seasonally adjusted average with December used as the reference date;

### Gross Value Added

- data taken from Scottish Government Scottish Annual Business Statistics <http://www.scotland.gov.uk/Topics/Statistics/16170/ServBroad>
- GVA per employee at the Argyll and Bute level for 2008 is estimated using the most up to date (2007) figure and inflated to reflect current prices using the Retail Price Index <http://www.statistics.gov.uk/statbase/tsdataset.asp?vlnk=7172&More=Y>
- Tourism GVA is provided through the Scottish Government Scottish Annual Business Statistics <http://www.scotland.gov.uk/Topics/Statistics/16170/Tourism-related>

### Property

- property data on take-up and availability provided through the Scottish Property Network based on information supplied through the land use register; and
- planning applications, completion notifications and household projections provided by Argyll and Bute Council.

### Tourism Visitor Day Market

- tourism data based on SQW Consulting report. “Tourism Destination Baseline Study” to inform Scottish Enterprise Tourism Framework for Change (January 2008). Report has been forwarded to Argyll and Bute Council;
- average wages provided through Annual Survey of Hours and Earnings (ASHE) through the NOMIS website. Data is based on median gross weekly earnings of the local authority areas;
- population data based on local authority boundaries from the GROS population estimates;
- access to private transport provided through Scottish Census 2001 (SCROL); and
- visitor attraction data based on EKOS research and input from project managers.