Glasgow

Glasgow City Council

Briefing Paper by Executive Director of Development and Regeneration Services

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EMPLOYMENT CHANGE IN GLASGOW

Two Supplementary Papers – Analysis of more recent data

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Census and the Economy - Supplementary Paper 1: BRES 2009-14

1. The Business Register and Employment Survey (BRES) is an outline of workplace-based employment produced on an annual basis that allows for a fine-grained industrial breakdown, comparisons with other cities and national trends and over time. Its main drawback is the length of time to get the results, and the absence of data on the occupational structure of employment. As a workplace-based indicator, it counts jobs within Glasgow regardless of the place of residence of the employee.

2. The headline is that the current (2014) number of jobs in Glasgow is 3.4% higher than in 2013. However, and in a broader sense, the city is still to recover from recession in terms of employment. As the dataset is consistent since 2009 comparisons over time can be made; and the current employment level of 397,900 is still 3.0% lower than 2009 level of 410,400; whereas national and rates in other cities are higher than in 2009.

3. Glasgow and the surrounding Glasgow Clyde Valley area are the main areas where employment rates have not yet reached the 2009 level.

Table 1: BRES Estimate of Workplace-Based Employment in Glasgow and Other Cities

	2014	Change since 2013	Change since 2009
Glasgow	397,900	+3.4%	-3.0%
GCV excl Glasgow	422,700	+3.6%	-0.4%
Edinburgh	315,000	+3.0%	+2.8%
Liverpool	230,800	+1.5%	+1.0%
Manchester	336,500	+1.8%	+8.8%
Birmingham	490,300	+2.6%	+6.9%
Leeds	412,300	+1.5%	+3.9%
Scotland	2,437,100	+3.8%	+1.3%
Great Britain	27,950,900	+3.2%	+4.9%

GCV excl Glasgow includes North and South Lanarkshire, East and West Dunbartonshire, Renfrewshire and East Renfrewshire, and Inverclyde. On the other hand, Glasgow's relatively strong employment growth since 2013 may be an indication that the city has experienced a time lag in comparison to other cities. Earlier employment data suggested that Glasgow was slow to be affected by the recession.

4. The employment level reflects Gross Value Added (GVA) output figures on the size of the city economy. Data on GVA is available from the Office for National Statistics (ONS). The most recent 2013 figures show that the current headline rate is still 3.3% lower than the 2009 rate, once the Treasury's annual GDP deflators are used to take into account annual inflation. The following table compares headline GVA in each year with the 2009 figure adjusted for inflation.

Table 2: ONS Estimate of GVA

	2009	2010	2011	2012	2013
Headline GVA	£18.229bn	£17.660bn	£18.386bn	£18.786bn	£19.256bn
2009 adjusted		£18.590bn	£19.179bn	£19.588bn	£19.913bn
Difference		-£0.93bn	-£0.79bn	-£0.80bn	-£0.66bn
		-5.0%	-4.1%	-4.1%	-3.3%

The 2009 adjusted row expresses the 2009 value by the cumulative effect of the annual GDP deflator. Whilst headline GVA has increased, in real terms the amount is still lower than the 2009 level once inflation is considered, although the gap is decreasing.

5. The structure of employment since 2009 is shown as follows.

Table 3: Structure of Employment

	2009		2013		2014	
Employees	410,400		384,800		397,900	
% Full-time employees	286,800	69.9%	256,900	66.8%	270,500	68.0%
% Part-time employees	123,600	30.1%	127,900	33.2%	127,400	32.0%
% Self-Employed	7,800	1.9%	6,800	1.7%	6,600	1.6%

Compared with 2009, full-time employment numbers have fallen by 5.7%, while part-time employment has increased by 3.1%. This pattern is not unusual when compared with other cities. The BRES has a separate category of self-employment, based on sole traders registered for VAT and/or operating a PAYE scheme: while this has fallen it is again similar to the experience of other cities.

6. In terms of total employment, the three largest industrial sectors are

- Health, comprising 17.0% of all jobs, and increasing by 10.4% since 2009;
- Business administration & support services (including temporary employment placements and call centres), 14.1% of jobs, and increasing by 5.3% since 2009;
- Retail, 9.8% of jobs, and increasing by 6.4% of all jobs.

Table 4: Breakdown of Employment by Industry

	2009	2013	2014	Change 2009-13	
				No	%
1 : Agriculture, forestry & fishing	0	0	0	0	0
2 : Mining, quarrying & utilities	5,900	5,200	4,900	-1,000	-17.1
3 : Manufacturing	20,500	18,0005	18,500	-2,000	-10.0
4 : Construction	19,300	15,400	16,100	-3,200	-16.5
5 : Motor trades	5,100	5,000	4,600	-500	-8.8
6 : Wholesale	11,200	9,000	9,500	-1700	-15.1
7 : Retail	36,600	38,600	38,900	2,300	6.4
8 : Transport & storage (inc postal)	14,700	12,500	12,500	-2,200	-14.9
9 : Accommodation & food services	25,900	27,900	27,600	1,700	6.4
10 : Information & communication	13,600	14,300	15,300	1,600	11.8
11 : Financial & insurance	22,200	21,300	23,200	1,000	4.7
12 : Property	8,300	8,100	7,200	-1,100	-13.5
13 : Professional, scientific & technical	39,000	26,600	27,700	-11,300	-29.0
14 : Business administration & support services	53,200	53,900	56,000	2,800	5.3
15 : Public administration & defence	26,400	20,500	20,900	-5,500	-21.0
16 : Education	30,000	30,100	31,300	1,300	4.4
17 : Health	61,300	60,600	67,700	6,400	10.4
18 : Arts, entertainment, recreation & other services	17,100	17,900	16,000	-1,100	-6.3
Total	410,400	384,800	397,900	-12,500	-3.0%

The decline in the number of jobs in the professional, scientific and technical sector is of concern. This category includes industries such as legal, accountancy, architecture, advertising, market research and management consultancy. The level of activity in this industrial sector is a consequence of the overall health of the economy and may not be surprising, given the depressed level of GVA output. But Glasgow is also seeing growth in sectors consistent with an urban economy, notably in Information & Communication, Education and especially Health.

7. An additional sectoral breakdown can be made using the Scottish Government's definition of key sectors

Table 5: Employment by Key Sector in Glasgow

	2014	% 2014 Total	Change since 2013	Change since 2009
Financial & Business Services	51,870	13.0%	+8.8%	-4.6%
Life Science	100	0.2%	+3.4%	-17.2%
Energy incl Renewables	3,700	0.9%	-1.4%	-18.7%
Tourism & Events	27,600	6.9%	-5.4%	+10.0%
Creative Industries	8,300	2.1%	+6.7%	-3.0%
Total Key Sectors	92,400	23.2%	+3.5%	-1.4%

With the exception of Tourism & Events, employment levels of all key industries is lower than in 2009, although some have strengthened since 2013.

8. As a proportion of all jobs, the key sectors comprise 23.2% of all jobs: higher than national rates and the surrounding GCV area, but lower than major competitive cities such as Manchester, Leeds and especially Edinburgh.

Table 6: Key Sector Employment in Glasgow and Other Cities

	2014	% 2014 Total	Change since 2013	Change since 2009
Glasgow	92,400	23.2%	+3.5%	-1.4%
GCV excl Glasgow	69,400	16.4%	-0.1%	+3.0%
Edinburgh	99,500	31.6%	+1.7%	+4.2%
Liverpool	49,540	21.5%	+9.9%	+9.1%
Manchester	95,000	28.3%	+3.5%	+18.7%
Birmingham	100,100	20.4%	+3.3%	+16.5%
Leeds	102,600	24.9%	+5.2%	+12.3%
Scotland	506,100	20.8%	+1.4%	+4.1%
Great Britain	5,952,000	21.3%	+5.3%	+11.4%

Birmingham has seen strong growth in the Creative Industries and Tourism & Events sectors; while in Manchester the increase has been in Financial & Business Services as well as in Tourism & Events.

9. The BRES can also be used to outline industry concentrations ie sectors where Glasgow has a disproportionately higher or lower level of employment. Using the three figure Standard Industrial Classification, which lists 273 separate industries, and defining industries in terms of having 1000 or more employees, the concentrations in Glasgow compared to Scotland are as follows. LQ is Location Quotient and is the standard measure of expressing industry concentrations. It states, for example, that in the manufacture of optical instruments & photographic equipment the sector employs 4.96 as many persons in Glasgow as there would be if Glasgow conformed to the Scottish average.

Table 7: Industry Concentration in Glasgow

Sector	No	% Total	LQ
267: Manufacture of optical instruments & photographic equipment	1,000	0.3	4.96
649: Other financial service activities, not insurance & pension funding	2,500	0.6	4.40
811: Combined facilities support activities	18,000	4.5	3.38
731: Advertising	1,500	0.4	3.21
591: Motion picture, video & television programme activities	2,800	0.7	3.20
662: Activities auxiliary to insurance & pension funding	5,900	1.5	2.94
301: Building of ships & boats	2,700	0.7	2.52
900: Creative, arts & entertainment activities	2,400	0.6	2.37
661: Activities auxiliary to financial services not insurance & pension funding	4,500	1.1	2.32
801: Private security activities	4,900	1.2	2.31

10. Compared to the average for cities, including Edinburgh, Liverpool, Manchester, Birmingham and Leeds, the details are as follows.

Table 8: Industry Concentration Comparing Glasgow with Other Cities

Sector	No	% Total	LQ
811: Combined facilities support activities	18,000	4.5	7.86
110: Manufacture of beverages	1,700	0.4	5.40
351: Electric power generation, transmission and distribution	2,000	0.5	4.79
591: Motion picture, video & television programme activities	2,800	0.7	3.62
649: Other financial service activities, not insurance & pension funding	2,500	0.6	3.43
381: Waste collection	1,400	0.4	3.22
851: Pre-primary education	1,500	0.4	2.45
107: Manufacture of bakery and farinaceous products	2,000	0.5	2.04
843: Compulsory social security activities	1,100	0.3	1.99
439: Other specialised construction activities	1,800	0.5	1.61

To clarify

- 811 Combined facilities support activities: this category includes facility cleaning, maintenance and other activities that are not part of the core activities of the client;
- 649 Other financial service activities, not insurance & pension funding: this includes activities including financial leasing, credit granting by non-deposit taking financial agencies, specialist mortgage finance, and debt factoring.

Glasgow has by far the largest share of UK activity in combined facilities support activity, and this may reflect head office activity rather than functions taking place within Glasgow.

11. The overall picture of employment in Glasgow is therefore mixed.

- Employment is higher than in 2013, lower than in 2009; and in line with GVA details;
- Glasgow is performing better than the surrounding local authorities in the Glasgow Clyde Valley area, but in many cases not as well as comparator cities;
- Employment levels in key sectors is better than national rates but again not as good as some comparator cities;
- Two of the three largest sectors (business admin & support, retail) are likely to provide opportunities for entry-level employment.

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Census and the Economy – Supplementary Paper 2: APS analysis 2009-14

1. The Annual Population Survey (APS) provides both residence-based and workplace-based estimates of employment that are reasonably up to date. The estimates can also be analysed by type of industry as well as type of occupation. But as a dataset based around a survey, it provides data points set within confidence intervals, making it difficult to accurately show change over time. For this reason the preference has been to use workplace-based employment estimates from the Business Register and Employment Survey (BRES). The most recent APS occupational data for Glasgow is however showing some interesting patterns that deserve wider consideration.

2. The strength of the APS is that it provides an estimate of employment among the resident-based population, and crucially details of the occupational structure of employment. The composition of employment in terms of occupation in Glasgow has changed since 2010, and analysis of that forms an important part of this briefing note.

3. The main headlines of the analysis are as follows. Between 2009 and 2014

- Residence-based employment in Glasgow:
    - The number of residents in employment (258,300) increased by 5.6% (13,700);
    - The number of residents in professional/managerial/technical jobs (101,200) increased by 40.8% (29,300);
    - The number of residents in employment with NVQ level 4+ (ie degree level qualifications) (136,700) increased by 39.3% (38,600);
    - The number of residents in elementary/machine operative jobs (45,900) decreased by 3.0% (1,400);

  Note that the increase in the 16-64 population (17,100) was greater than the increase in the 16-64 population in employment (13,700).
- Workplace-based employment in Glasgow: the number of
    - jobs (415,900) increased by 0.3% (1,300);
    - professional/managerial/technical jobs (168,900) increased by 18.0% (25,800);
    - elementary/machine operative jobs (61,400) decreased by 4,200 (6.4%).

4. The headline is that resident-based employment estimates in Glasgow increased in comparison with both the 2010 and 2013 levels. The increase in Glasgow was greater than the change in the Glasgow and Clyde Valley (GCV) excluding Glasgow area.

Table 1: Residence-Based Employment Level (16-64 population)

	2014	Change since 2013	Change since 2009
Glasgow	258,300	+1.2%	+5.6%
GCV excl Glasgow	551,500	+1.5%	+0.1%
Edinburgh	245,100	+4.2%	+6.5%
Liverpool	189,600	-3.1%	+2.5%
Manchester	227,100	+1.8%	+12.9%
Birmingham	433,600	+6.3%	+9.4%
Leeds	347,200	+1.3%	+0.6%
Scotland	2,478,500	+2.5%	+1.5%
Great Britain	28,563,400	+1.8%	+3.8%

Estimates are for January-December each year

The GCV area excluding Glasgow includes North and South Lanarkshire, East and West Dunbartonshire, Renfrewshire and East Renfrewshire, and Inverclyde. Employment rates are based around several variables, including (a) underlying levels of demand, such as unfilled posts; (b) the capacity of the working-age population to meet the skills associated with this demand; (c) the availability of working age people able to move into employment; and (d) commuting patterns.

5. The structure of employment is that

- Residence-based employment
  - 73.3% of employees are in full-time employment,
  - 26.7% are in part-time employment;
- Workplace-based employment
  - 76.3% of the jobs go to full-time employees,
  - 23.7% go to part-time employees.

There are signs, therefore, that a slightly higher proportion of Glasgow employees are in part-time work in comparison with the total number of jobs in the city.

5. One of the main drivers of the increase in employment has been increases in the size of the working-age population. All areas in the above table, with the exception of the GCV excluding Glasgow area, saw an increase in the 16-64 age group. In Glasgow

- Between 2009 and 2014 the 16-64 population increased from 402,300 to 419,400, or by 17,100;
- Over the same period the 16-64 population in employment increased from 244,600 to 258,300, or by 13,700;
- In cities such as Manchester and Birmingham, and for Scotland and GB, the increase in the employment level was greater than the increase in the working age population;
- However in Glasgow the increase in the employment level was lower than the increase in the working age population, and the dynamics have an age-related pattern:
  - A large part of the working age population increase in Glasgow came from the 50-64 age group (which increased by 10,700) while employment in that age group increased by a similar amount (up by 9,300);
  - The 16-24 age group declined by 2,800 (from 86,900 to 84,100) while employment in that age group declined by 10,400 (from 40,100 to 29,700).

6. School leaver destination data from Scottish National Statistics provide a means of understanding of how these changes have affected the 16-24 age group.

Table 2: School Leaver Destinations in Glasgow

	2009/10	2012/13	Change	% Change
Higher Education	1,583	1,689	+106	+6.7%
Further Education	1,517	1,384	-133	-8.8%
Training	515	532	+17	+3.3%
Employment	934	965	+31	+3.3%
Unemployed Seeking work	670	465	-215	-30.6%
Unemployed Not Seeking work	85	47	-38	-44.7%
Unknown	56	16	-40	-71.4%
Total	5,360	5,098	-262	-4.9%
Total Negative	811	528	-283	-34.9%

For 2012/13 total negative destinations (both unemployed categories and unknown) in Glasgow was 10.4% of all outcomes (GCV excl Glasgow 8.9%, Scotland 8.6%) and had fallen by -34.9% in comparison with 2009/10 (GCV excl Glasgow -25.9%, Scotland -36.6%).

7. In Glasgow the pattern appears to have been that increases in the 50-64 age group have been associated with increases in employment by virtually the same amount; and to have been associated with decreases in employment among the 16-24 age group. In both Manchester and Birmingham a similar pattern of increases in the 50-64 age group and in employment within that age group has taken place without a disproportionate decrease in employment within the 16-24 age group.

8. Another perspective on these changes is from the Department of Work & Pensions data on claimants of out-of-work (OOW) benefits.

Table 3: OOW Benefit Claimants in Glasgow

	November 2009	November 2014	Change	% Change
Under 25	11,730	7,780	-3,950	-33.7%
Age 25-34	17,360	13,490	-3,870	-22.3%
Age 35-44	20,980	14,750	-6,130	-29.7%
Age 45-54	22,800	20,180	-2,620	-11.5%
Age 55-59	10,190	10,150	-40	-0.4%
Age 60-64	6,390	7,180	+790	+12.4%
Total	89,450	73,530	-15,920	-17.8%

The concern with using this data is that some of the change may be attributed to legislation and not to a change in circumstances. For comparison, the percentage change over the same period for Scotland was -19.2%; and for the GCV area excluding Glasgow -18.9%. the details for Glasgow clearly show that the reduction is due to the younger age groups, and tail off with the increasing age of the claimant.

9. The APS also provides workplace-based of employment. The interest in this is that it provides a more up-to-date estimate of workplace-based employment than the BREs. Over a comparable timescale the APS estimate for Glasgow is higher than the BRES estimate and also higher than the result for 2009. On this measure the increase in the number of workplace jobs in Glasgow since 2010 (4.8%) is higher than the increase in both Scotland (1.5%) and the surrounding GCV area (1.8%).

Table 4: Workplace-Based Employment

	2014	Change since 2013	Change since 2009
Glasgow	415,900	+3.9%	+0.3%
GCV excl Glasgow	397,000	-1.9%	-0.1%
Edinburgh	326,100	+6.6%	+9.8%
Liverpool	258,400	-7.2%	-0.3%
Manchester	414,700	+0.9%	+13.5%
Birmingham	553,400	+5.6%	+10.8%
Leeds	397,800	+6.2%	+2.8%
Scotland	2,459,700	+1.5%	+0.7%
Great Britain	28,282,900	+2.0%	+3.6%

Estimates are for January-December each year

Although there are concerns over the confidence intervals the APS is presenting a more positive figure of employment. This more positive picture is continued by the workplace-based estimates for April 2014-March 2015 (421,900) and July 2014-June 2015 (424,500).

10. The APS allows for an analysis of the occupational structure of employment. Since 2010 the two sectors expanding most rapidly are Professional and Associate Professional & Technical jobs; which require either a degree or a substantial amount of full-time training or further study. The increase is at both residence-based and workplace-based level.

Table 5: Residence-Based Occupational Structure

	2014	Change since 2013	Change since 2009
1: Managers, directors and senior officials	17,800	-6.8	-3.3
2: Professional occupations	66,400	2.8	41.0
3: Associate prof & tech	34,800	14.1	40.3
4: Administrative and secretarial	23,400	-2.9	-26.2
5: Skilled trades occupations	23,600	31.1	3.5
6: Caring, leisure and other service	24,300	3.8	-9.0
7: Sales and customer service	22,700	-16.5	-18.9
8: Process, plant and machine operatives	14,000	9.4	-14.0
9: Elementary occupations	31,900	-3.6	+2.9
Total	258,900	2.4	4.4

Estimates are for January-December each year

The main changes have been decreases in Administrative & Secretarial occupations, and a large fall in Sales & Customer Service.

11. A broadly similar pattern can be seen with workplace-based estimates of the occupational structure.

Table 6: Workplace-Based Occupational Structure

	2014	Change since 2013	Change since 2009
1: Managers, directors and senior officials	30,800	-11.7	-20.4
2: Professional occupations	102,900	9.4	24.4
3: Associate prof & tech	66,000	11.5	9.3
4: Administrative and secretarial	46,100	-7.2	-22.5
5: Skilled trades occupations	36,700	19.5	7.0
6: Caring, leisure and other service	36,400	15.6	0.0
7: Sales and customer service	41,000	-3.3	-1.2
8: Process, plant and machine operatives	20,100	-6.1	-15.5
9: Elementary occupations	41,300	0.2	-1.2
Total	421,300	4.0	0.5

Estimates are for January-December each year

The details point to a strong increase in Professional and Associate Professional occupations; and to a decline in Managers, Directors & Senior Officials. These trends are reflected by a similar analysis of the residence-based occupational structure of employment.

12. The focus of growth is therefore on Professional & Associate Professional/Technical Occupations. When the two occupational sectors are combined, Glasgow has both

- A high proportion of its jobs in these sectors, compared to national levels, and other cities;

- A greater rate of increase than national trends, particularly on the residence-based measure.

Table 7: Residence-Based Professional & Associate Professional/Technical Occupations

	2014	% 2014 Total	Change since 2013	Change since 2009
Glasgow	101,200	38.7	6.4	40.8
GCV excl Glasgow	174,400	30.9	2.2	-0.2
Edinburgh	112,000	44.6	2.6	12.0
Liverpool	68,300	35.1	12.5	9.5
Manchester	79,300	34.4	-2.7	26.3
Birmingham	142,100	31.9	19.9	8.5
Leeds	131,200	36.7	4.2	20.4
Scotland	829,100	32.4	2.6	8.2
Great Britain	10,020,600	33.8	2.4	10.4

Estimates are for January-December each year

There is a clear increase in Glasgow since 2009 and the magnitude is greater than for comparable cities, and national rates.

13. At the workplace level the increase is less stark, but still greater than national trends.

Table 8: Workplace-Based Professional & Associate Professional/Technical Occupations

	2014	% 2014 Total	Change since 2013	Change since 2009
Glasgow	168,900	40.1	10.2	18.0
GCV excl Glasgow	112,400	27.7	-5.8	-2.9
Edinburgh	140,500	42.2	2.0	18.1
Liverpool	105,200	39.7	11.3	15.1
Manchester	173,900	41.3	3.4	33.6
Birmingham	201,900	35.7	11.5	14.3
Leeds	155,400	38.1	6.7	21.2
Scotland	821,200	32.4	1.1	6.1
Great Britain	9,960,500	34.0	2.4	10.3

Estimates are for January-December each year

The main points are

- Glasgow has a higher proportion of its workplace jobs in Professional & Associate Professional/Technical Occupations compared to some other cities, and national rates;
- A very clear difference with the surrounding GCV area, where the proportion is lower and in decline;
- Between 2009 and 2014 the increase in residence-based Professional & Associate Professional/Technical Occupations (29,300) exceeded the increase in workplace-based Professional & Associate Professional/Technical Occupations (25,800);
- This suggests that a large proportion of the increase in Glasgow came from Glasgow residents, rather than from in-commuters.

As already mentioned, the confidence levels mean that these details should be seen as broad trends rather than exact indicators.

14. This change in the nature of Professional & Associate Professional/Technical Occupations is supported by, the increase in the resident employed workforce with degree level qualifications (NVQ4+). For this indicator the relatively small size of the confidence levels means that there is more certainty around the details.

Table 9: Residents in Employment with NVQ4+

	2014	% 2014 Total	Change since 2013	Change since 2009
Glasgow	136,700	53.1	3.6	39.3
GCV excl Glasgow	248,000	45.1	7.5	0.0
Edinburgh	161,500	66.0	14.4	35.5
Liverpool	69,000	36.5	-3.0	2.2
Manchester	106,500	46.9	-3.2	33.8
Birmingham	158,900	36.8	9.1	21.7
Leeds	143,700	41.5	1.3	11.7
Scotland	1,167,700	47.2	7.4	21.1
Great Britain	11,879,200	41.7	3.4	22.3

Estimates are for January-December each year

Compared to other cities, not only does Glasgow have one of the highest proportions of its employed workforce with degree-level qualifications, it has also had one of the greatest increases since 2009.

15. In terms of occupation, the main decreases in Glasgow since 2009 have been seen in

- Residence-based employment
    - Administrative & Secretarial: -8,300 (-26.2%);
    - Sales & Customer Service: -5,300 (-18.9%);
    - Process, Plant & Machinery: -2,300 (-14.1%).
- Workplace-based employment
    - Administrative & Secretarial: -13,400 (-22.5%);
    - Managers, Directors & Senior Officials: -7,900 (-20.4%);
    - Process, Plant & Machinery: -3,700 (-15.5%).

This needs to be set against a 5.6% increase in residence-based employment; and a 0.3% increase in workplace-based employment; over the same period.

16. The headline narrative is that increases in employment have been linked to an expansion in professional/managerial/technical jobs underpinned by an increase in qualifications held by the workforce and supported by an increase in the working-age population. At the same time there has been little change in the number of basic and unskilled employment so that entry-level jobs are more likely to be seen in sales and customer service occupations, as well as in the caring and leisure sector. This transformation has taken place over a relatively short period of time and has not been seen in the surrounding GCV area.

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