



Dundee City Economic Profile

March 2016

Foreword:

The Dundee Economic Profile contains labour market information and analysis on the strategic situation of the Dundee City economy and of the labour market. This publication contains high level national statistics, designed to inform on the overall performance of the city and regional economy. Analysis is presented in order to give a more complete picture of Dundee City's current labour market and economic situation. All statistics in relation to industry relate to business and enterprise registered in Dundee unless stated. All statistics in relation to employment, economic activity and out-of-work benefits is presented in relation to the residential population of the Dundee City local authority area, as opposed to those that work in Dundee, unless otherwise stated. All information within this document is available publically and sourced from official government sources, unless disclosure and restriction controls are stated. All information within is accurate as at April 2016.

Contents:

Economic Overview	P.3
Population and Demographics	P.4-9
Population Projections	P.10-11
Business, Sectors and Enterprise	P.12-30
Employment	P.31-37
Economic Activity	P.38-44
Unemployment	P.45-53
Out of Work Benefits	P.54-69
Income and Earnings	P.70-76
Property and Housing	P.77-79
Appendices	P.80-81

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Dundee City Economic Overview:

- Dundee is the fourth largest city in Scotland, with a population of 148,300. Dundee has a male population of 71,400, at 48.1 per cent and a female population of 76,900, at 51.9 per cent in 2014.
- Dundee City has working age population of 98,700, representing 66.6 per cent of the total population, compared to the Scottish national average of 64.8 per cent. In 2014, Dundee City had the fourth highest working age population of any Scottish Local Authority area. Dundee City is the smallest local authority area in Scotland but has the second highest population density in Scotland.
- Dundee City has the largest proportion population of people aged 18-24 in all of Scotland, at 13.6 per cent of the total population. Dundee has the second largest proportional population of those aged 18-29 in all of Scotland, at 22.2 per cent of the resident-based population.
- Dundee City has the largest proportional student population in all of Scotland. In 2014, Dundee City had 2.8 per cent of the Scottish population, with 8.6 per cent of Scottish Higher Education students attending the city's universities.
- Between 2010 and 2015, the number of enterprises in Dundee City increased from 3,425 to 3,735. Turnover for all enterprise in Dundee City increased from £4,458 million in 2010 to £5,044 million in 2015.
- By September 2015, Dundee City had the lowest employment rate of any Scottish local authority area, with 61,400 people and 63.3 per cent of the working age population in employment.
- Dundee City has the fourth highest unemployment rate of any Scottish local authority, at 8.3 per cent and 5,500 people as of September 2015. By February 2016, the Claimant Count head-line unemployment rate for Dundee was 3.2 per cent, the third highest in all of Scotland.
- By September 2015, Dundee City had the lowest economic activity rate and the highest economic inactivity rate in all of Scotland, with 69.0 per cent of the working age population economically active and 31.0 per cent economically inactive. Approximately 3 out of 10 of Dundee City's working age population were not engaged within the labour market in 2015.
- The performance of the Dundee economy is markedly higher from a regional perspective, in comparison to the economic performance in relation to the resident-based population. Economic recovery and output has taken place, although the resident population has not experienced this, with the city having a large population of employment and income deprived residents.

Population and Demographics

Demographics

Population Estimates: Dundee and Scotland (2014)

Population Estimates: Dundee and Scotland 2014					
	Males	%	Females	%	All People
Dundee City	71,362	48.1	76,898	51.9	148,260
Scotland	2,596,384	48.6	2,751,216	51.4	5,347,600

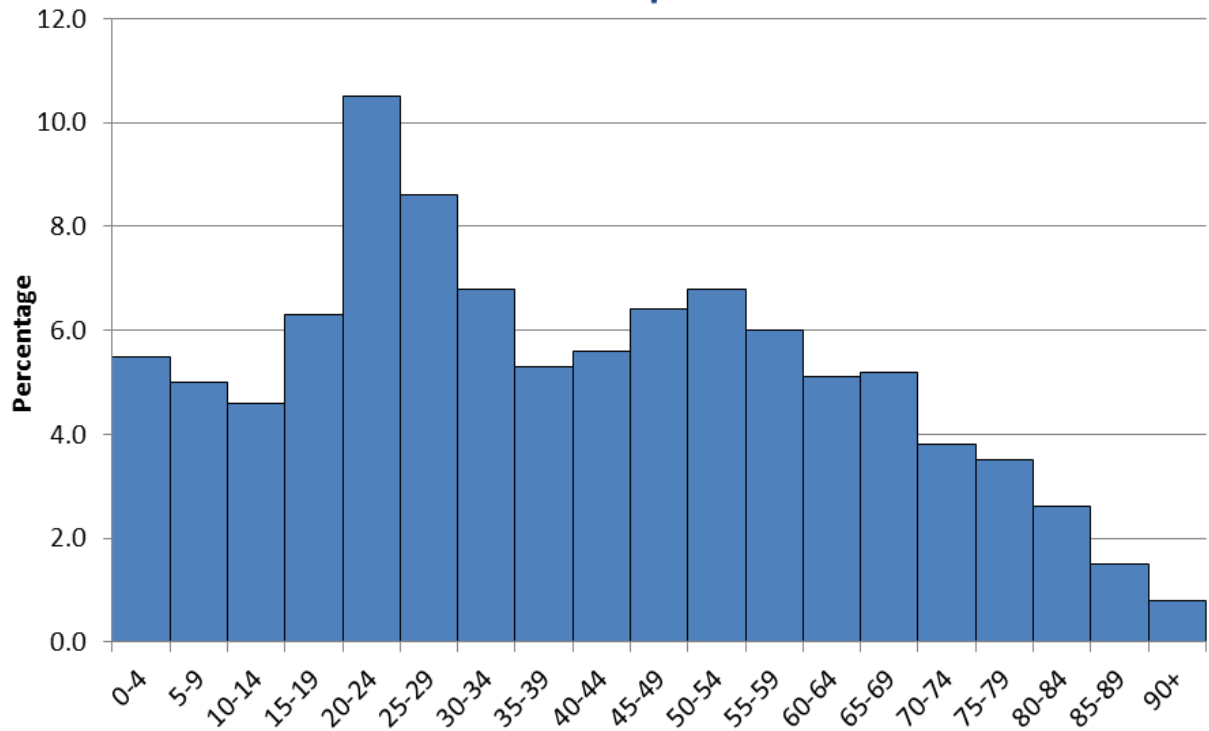
Share of Working Age Population: Dundee and Scotland (2014)

Share of Working Age Population: Dundee and Scotland Mid-2014							
	Under 16	%	Aged 16-64	%	65+	%	Total
Dundee City	23,037	15.5	99,427	67.1	25,796	17.4	148,260
Scotland	911,282	17.0	3,467,929	64.9	968,389	18.1	5,347,600

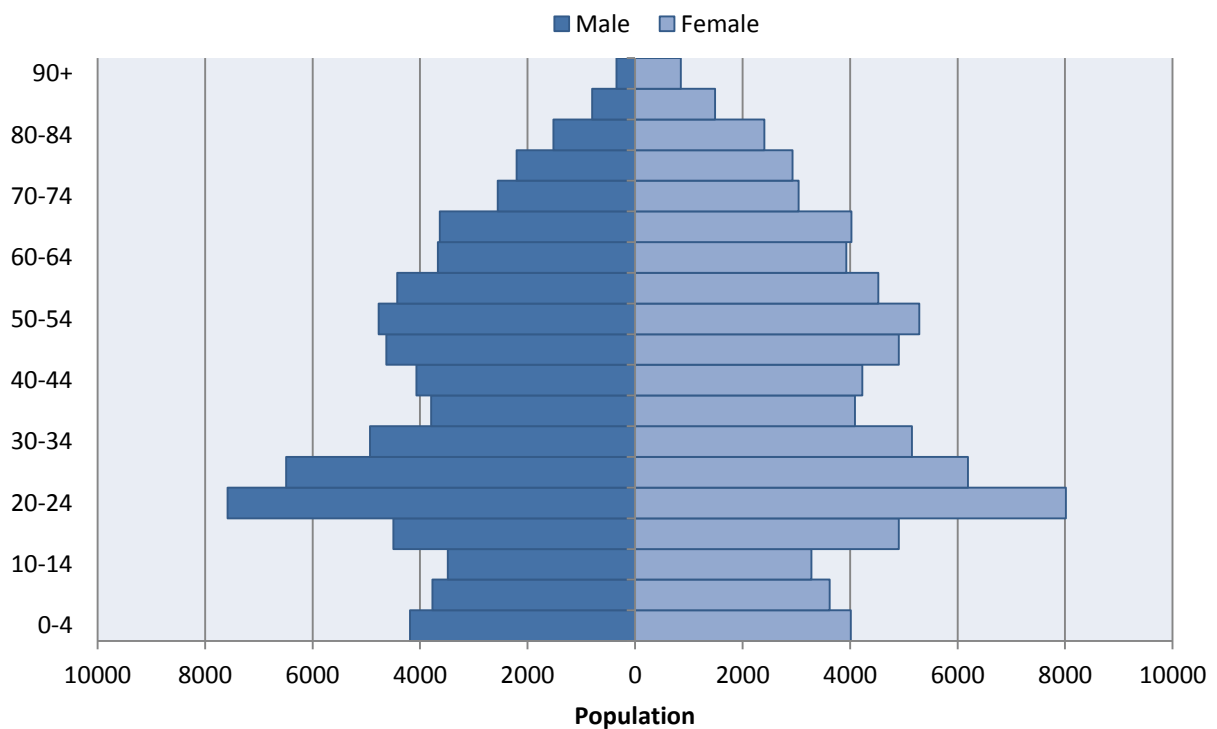
(Source): GRO Mid-year Population Estimates 2014

- In 2014, Dundee City had a significantly larger population of working age people than the Scottish national average, with 67.1 per cent of the population of working age in Dundee.
- In 2014, 11.3 per cent of Dundee City's population were females aged 18-29 and 10.9 per cent of the population were male aged 18-29.
- 7.1 per cent of Dundee City's population were females aged 18-24 in 2014 and 6.5 per cent of the City's population were males aged 18-24.

Dundee City 2014 Mid-Year Population by Age Group

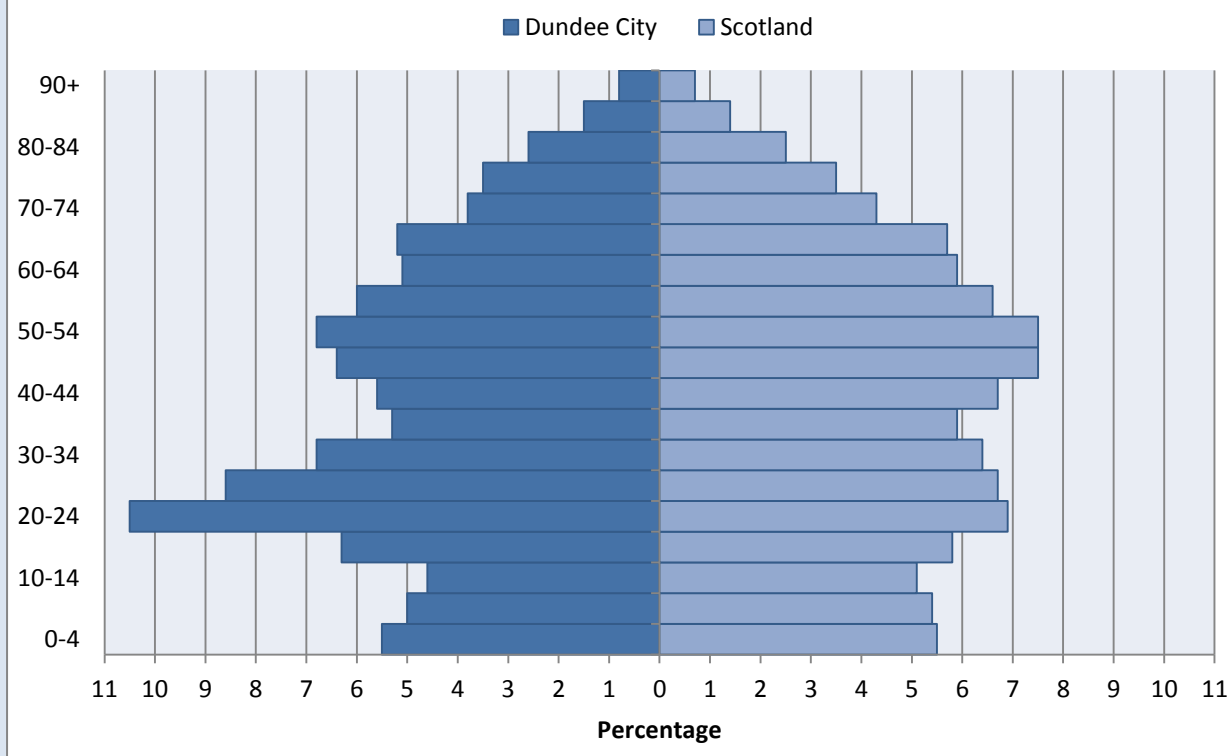


Dundee City Mid-Year Population by Sex 2014



Source: GRO Mid Year Population Estimates 2014.

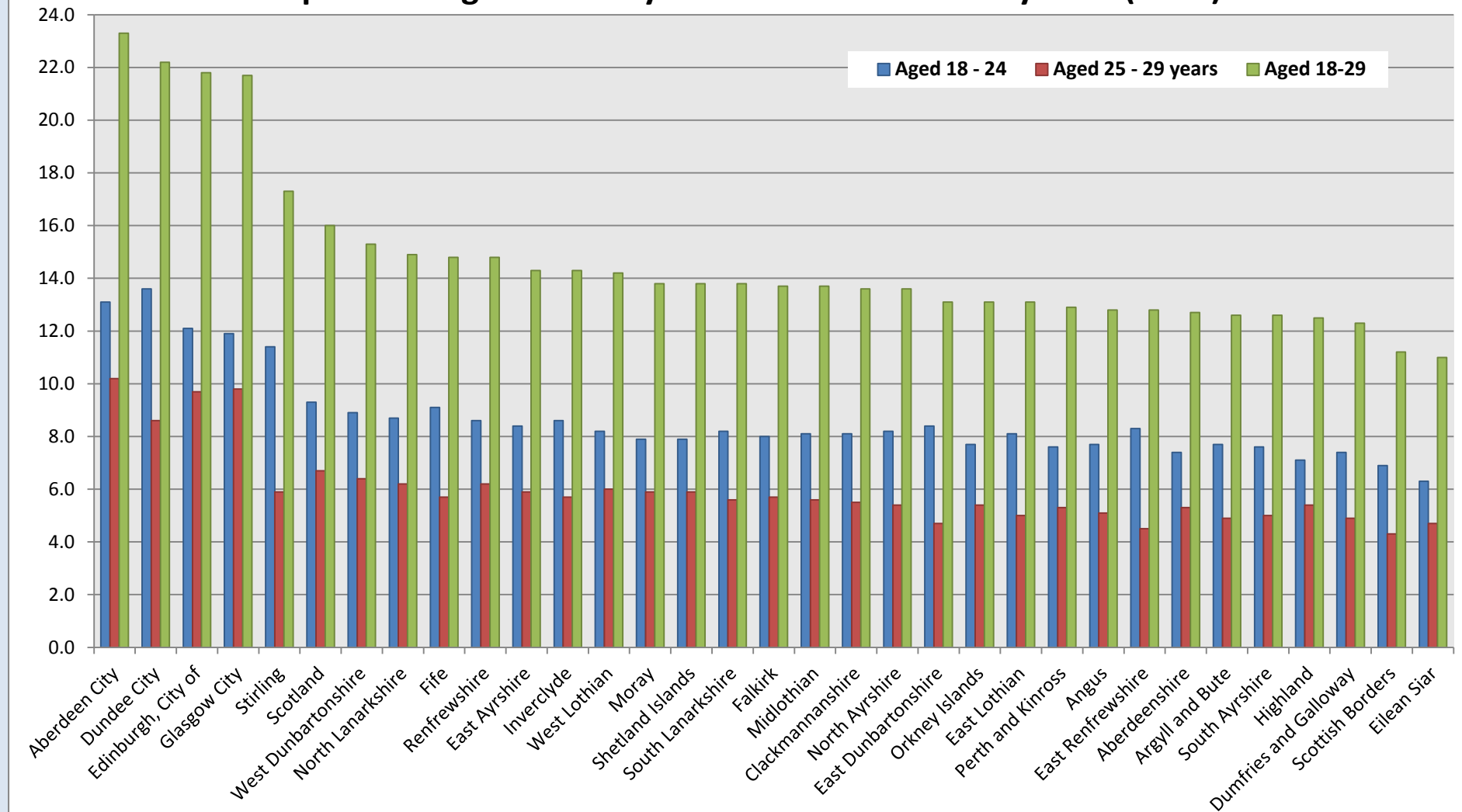
Population Estimates 2014 - Dundee City & Scotland



Source: ONS Mid-year Population Estimates 2014

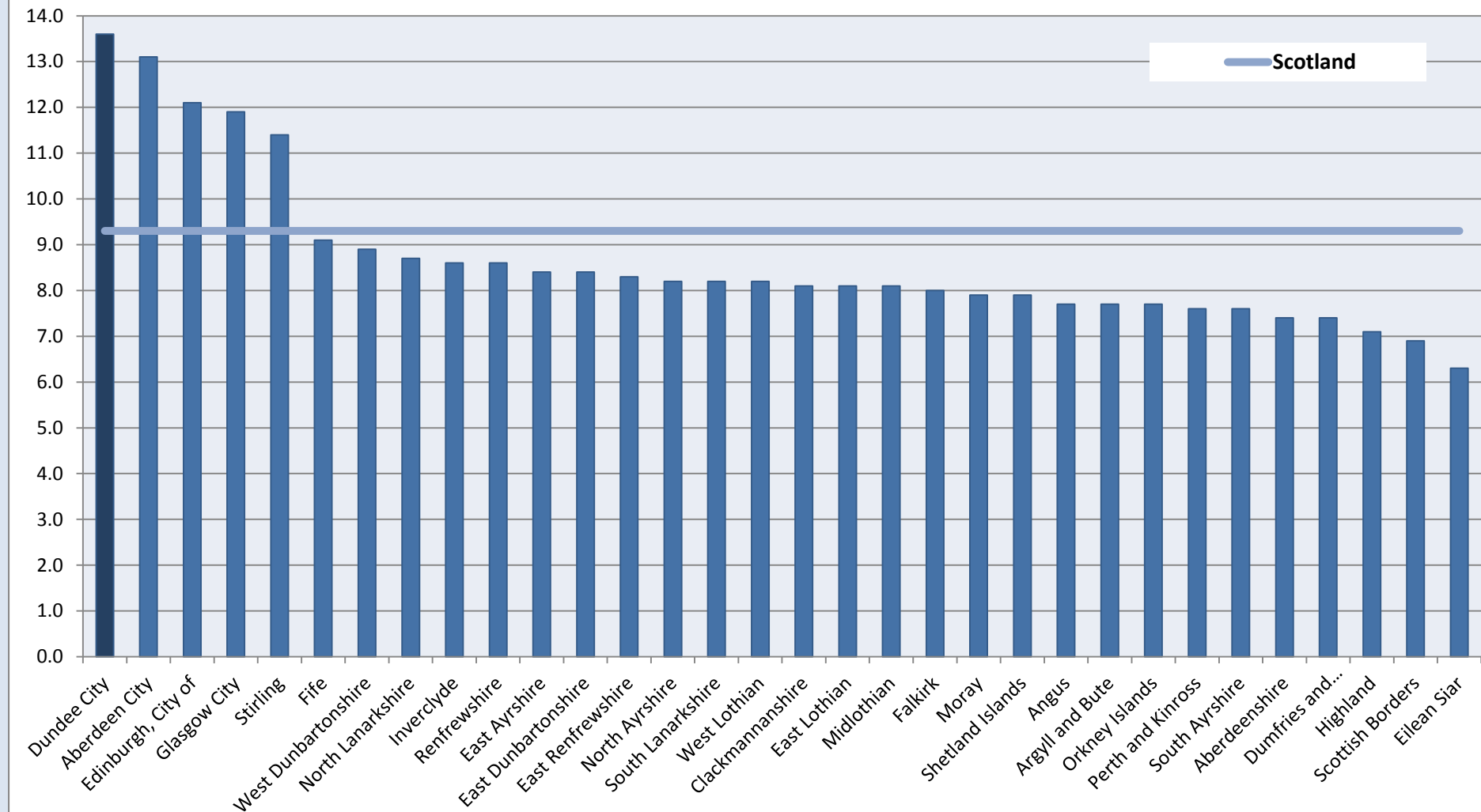
- As of 2014, Dundee City had a significantly larger percentage of the population aged 20-24 and 25-29 than the Scottish national average. The percentage of Dundee City's population aged 20-24 in 2014 was 10.5 per cent, compared to the Scottish national average of 6.9 per cent.
- The percentage of Dundee City's population aged 25-29 in 2014 was 8.6 per cent, compared to the Scottish national average of 6.7 per cent.
- Dundee City has a substantially larger proportion of its population aged 20-30 than the Scottish national average. In 2014, 13.6 per cent of Dundee City's population were aged 18-24, compared to the Scottish national average of 9.3 per cent. Proportionally, Dundee City has the largest population aged 18-24 in all of Scotland.
- In 2014, 22.2 per cent of Dundee City's population were aged 18-29, compared to the Scottish national average of 16.0 per cent.
- In 2014, Dundee City had the second largest proportional population aged 18-29 in all of Scotland. The 2008 economic recession has had disproportionately larger impact on areas with younger populations. This is combination with existing levels of concentrated deprivation and weaker local economic performance, have had substantial impacts on Dundee City's economic recovery.

Population Aged 18-29 by Scottish Local Authority Area (2014)



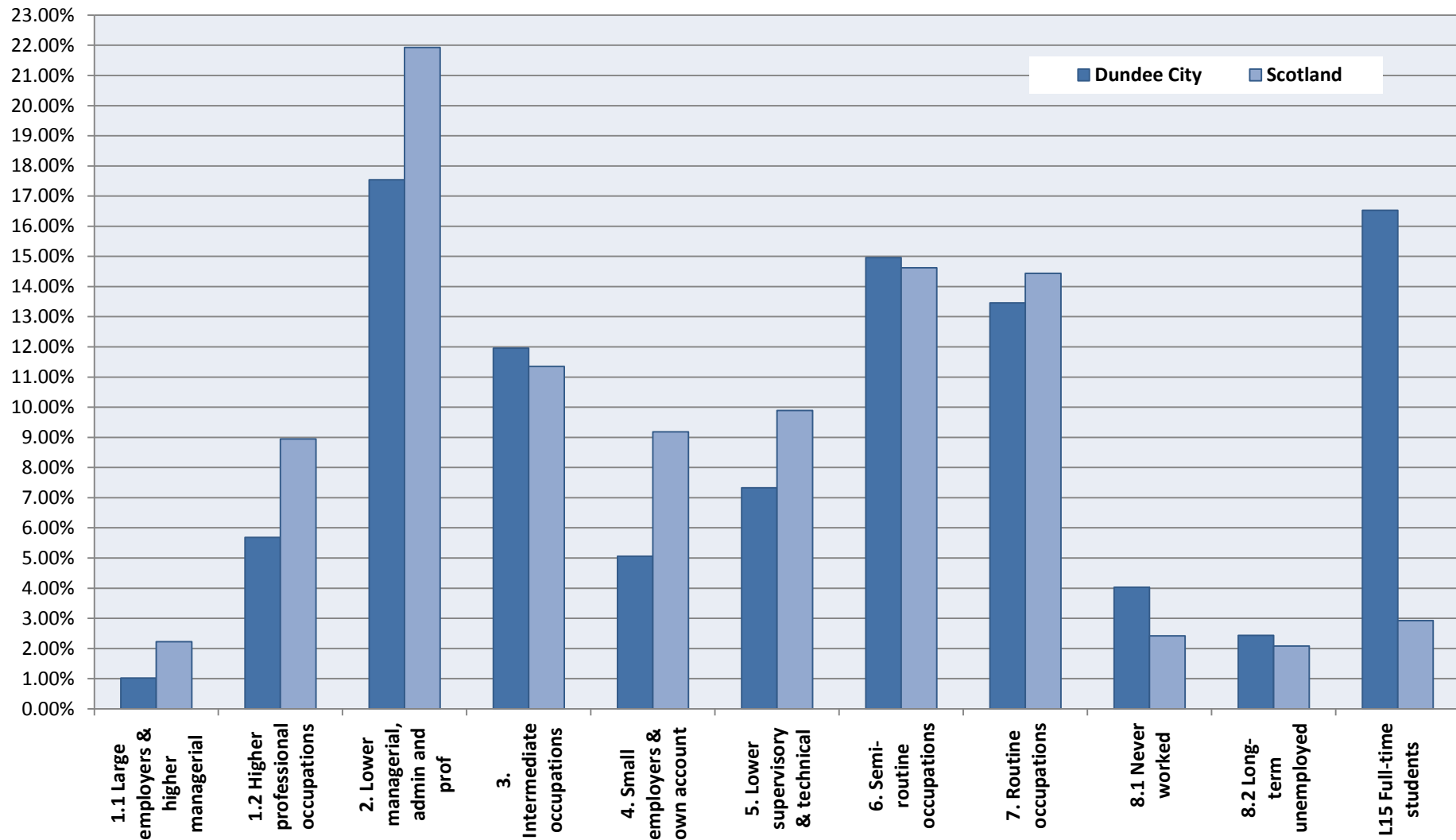
Source: ONS Population Estimates 2014.

Population (%) Aged 18-24 by Scottish Local Authority Area 2014



Source: ONS Population Estimates 2014.

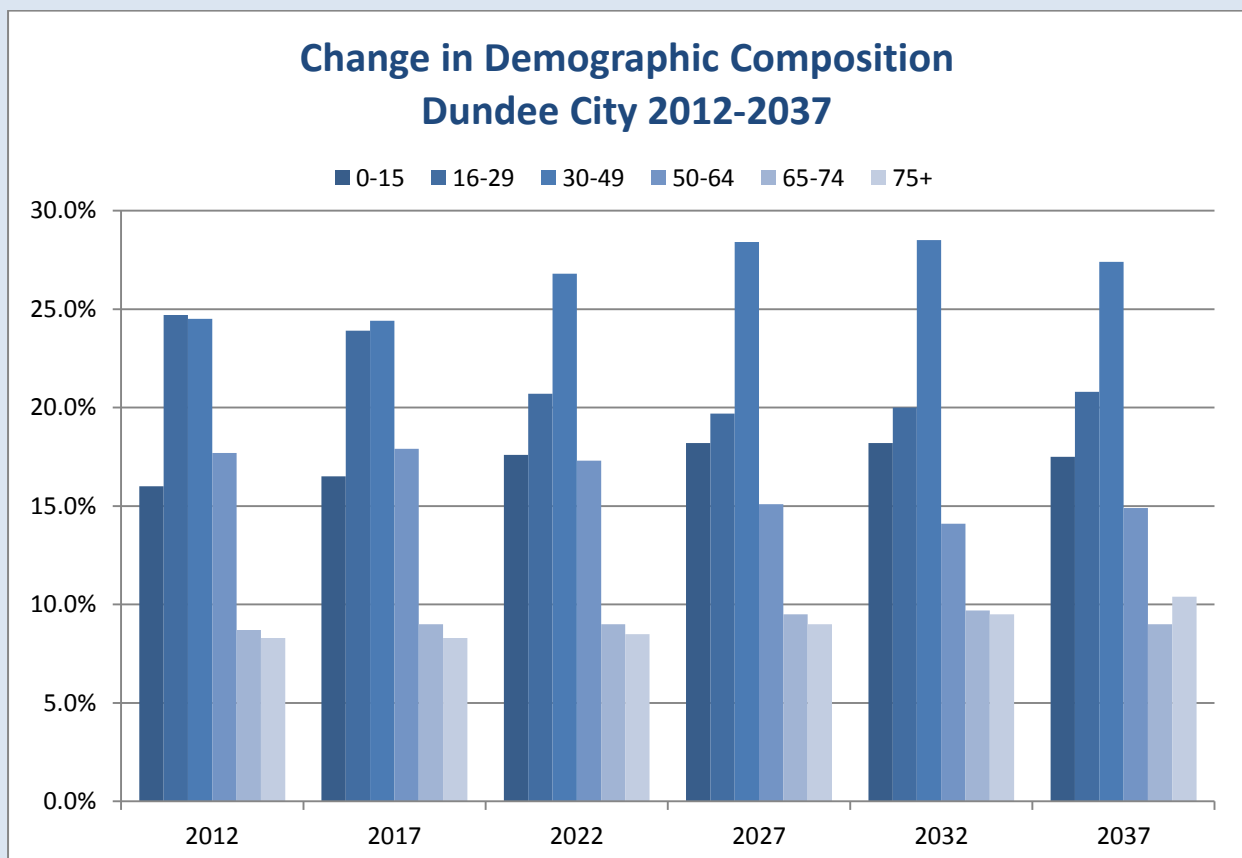
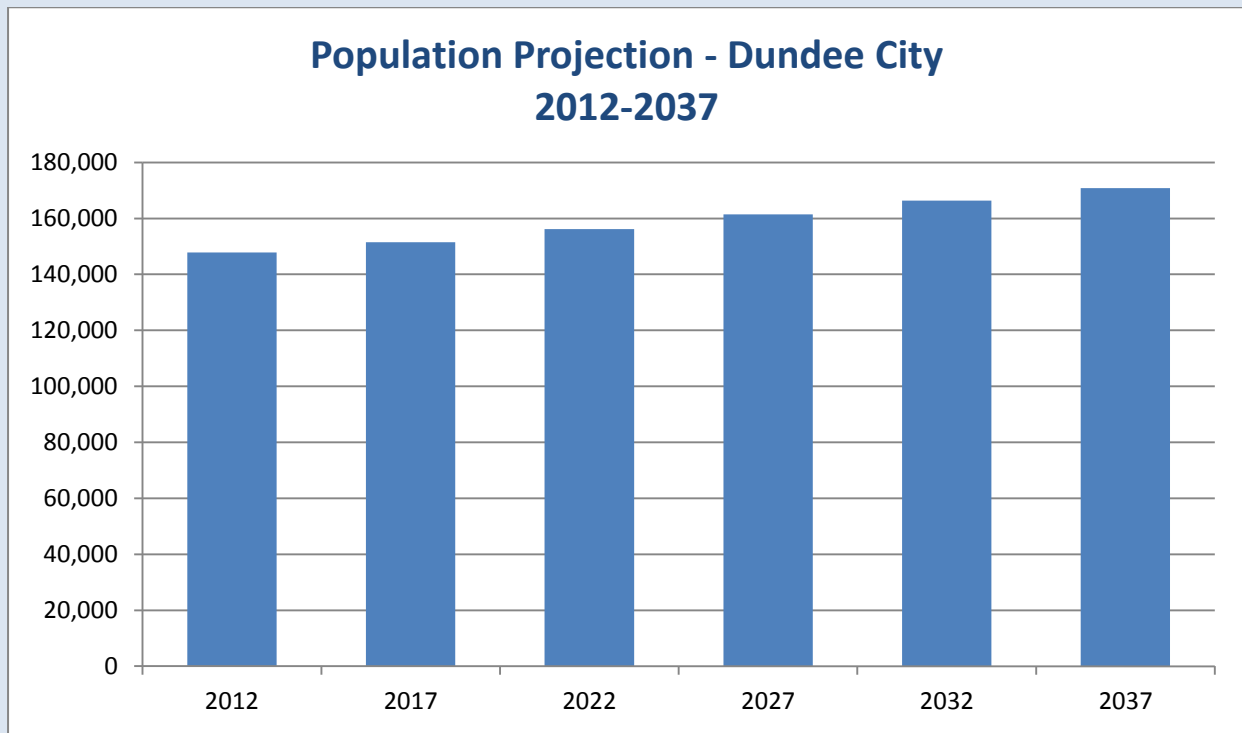
Socio-Economic Classification (HRP: Aged 16-74): Dundee City & Scotland 2011



Source: Scotland's Census 2011: *Socio-economic Classification by Household Reference Person.

Population Projections:

Dundee City Population Projections 2012- 2037

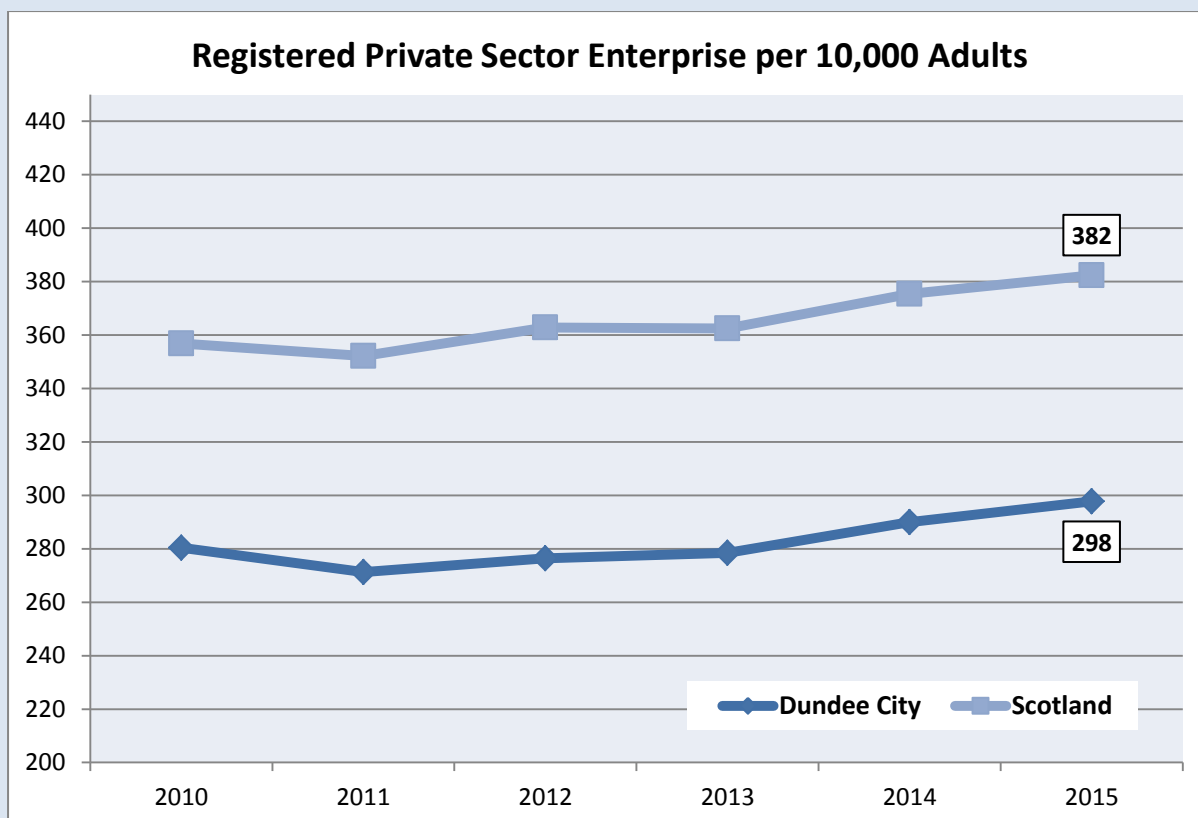


Source: NRS Population Projections for Scottish Areas

- Between 2012 and 2037, the population of Dundee City is projected rise 15.6 per cent and by 23,000, from 147,800 in 2012 to 170,800 in 2037.
- It is projected that the percentage share of the Dundee City population aged 0-15 will increase from 2012 to 2037, from 16.0 per cent in 2012, to 17.5 per cent in 2037.
- The percentage increase of Children aged 0-15 between 2012 and 2037 for Dundee City will be 26.0 per cent, compared to the Scottish national average which is projected to increase by 5.5 per cent within the same period.
- The percentage increase of the Working Age population between 2012 and 2037 for Dundee City is projected to be 15.8 per cent, compared to the Scottish national average, which is projected to increase by 4.0 per cent within the same period.
- The percentage increase of those of a Pensionable Age of 65 plus between 2012 and 2037 for Dundee City will be 6.1 per cent, compared to the Scottish national average over the same period, which is projected to increase by 26.7 per cent
- It is projected that the percentage of the Dundee City population who are aged 65-74 and 75 plus will increase from 8.7 to 9.0 per cent and 8.3 to 10.4 per cent respectfully.
- Although a projected increase is forecast in Dundee City of those of a Pensionable Age 65 plus, this figure the lowest percentage increase of all Scottish local authorities.
- Dundee has one of the highest proportional working age populations of any Scottish Local Authority. The number of people aged 18-30 living in Dundee is substantially higher than the Scottish national average and Dundee City has the highest proportional population Aged 18 -24 in Scotland.

Business, Sectors and Enterprise

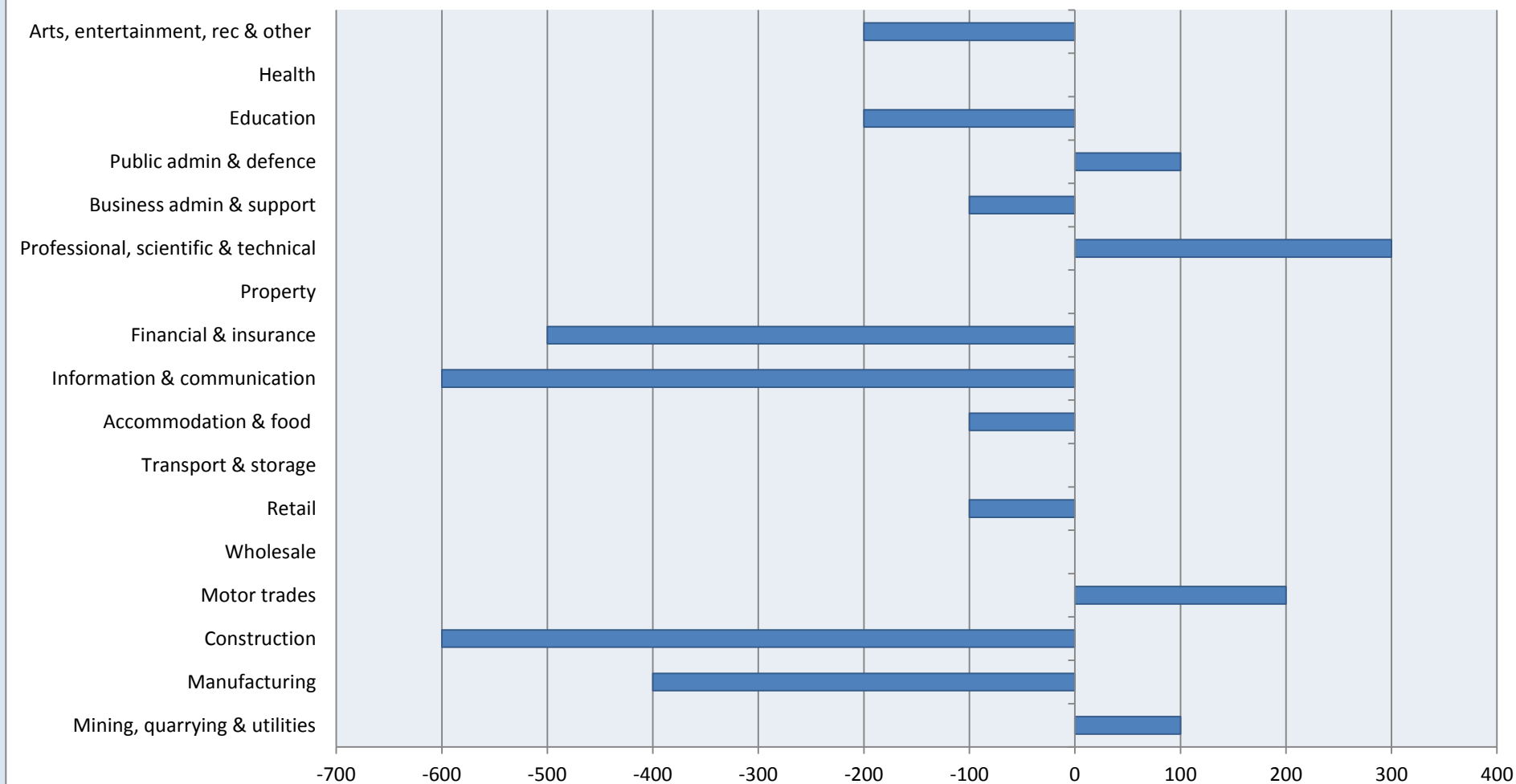
- Between September 2009 and September 2014, the Dundee City economy lost approximately 2,500 full time jobs. The sectors which have been affected by this most have been Information and Communication services, which lost 600 full-time jobs, Construction, which lost 600 full-time jobs and Manufacturing, which lost approximately 500 full-time jobs. The total number of employee jobs declined by approximately 1,900 within the same time period and 600 additional part-time jobs were created in Dundee City between 2009 and 2014.
- Approximately 300 employee jobs were created within the Professional, Scientific & Technical sector between 2009 and 2014. Within the Business Administration and Support Service sector, an additional 300 part-time jobs were created. More than 1,000 additional full-time jobs were created between 2013 and 2014 within this sector in Dundee.
- Dundee has a proportionally higher percentage of the workforce employed within the Public Sector, with 30.2 per cent of employment in Dundee in the Public Sector in 2014, compared to the Scottish national average of 23.5 per cent of employees within the Public Sector.
- By 2015, the largest employment sectors in Dundee City were Wholesale, Retail & Repairs, accounting for 12,270 employees, Education, Human Health & Social Services, with approximately 10,040 employees and Accommodation and Food Services, with approximately 4,650 employees.
- Between 2010 and 2015, there were approximately 300 more registered enterprises in Dundee City, with 3,735 enterprises in 2015. Total employment within these enterprises has returned to the approximate level in 2010, with 51,070 people employed within these enterprises in 2015.
- The approximate annual turnover of Dundee City enterprise increased from £4,458 million in 2010 to £5,044 million in 2015. The sector with the largest turnover was the Wholesale, Retail and Repairs Sector, with £1,760 million generated in 2015 and accounting for 34.9 per cent of enterprise turnover.



Source: *Businesses in Scotland, 2015*.

- In 2015, there were 298 registered enterprises per 10,000 adults in Dundee City, with 3,735 registered private sector enterprises. There were 382 private sector enterprises per 10,000 adults in Scotland in 2015.
- The number of registered private sector enterprises in Dundee has increased from 3,425 in 2010 to 3,735 in 2015, from 280 private sector enterprises per 10,000 adults to 298.
- The number of registered enterprises in Dundee City increased by 6.4 per cent between 2010 and 2015. The number of registered private sector enterprises in Scotland increased by 9.7 per cent between 2010 and 2015.

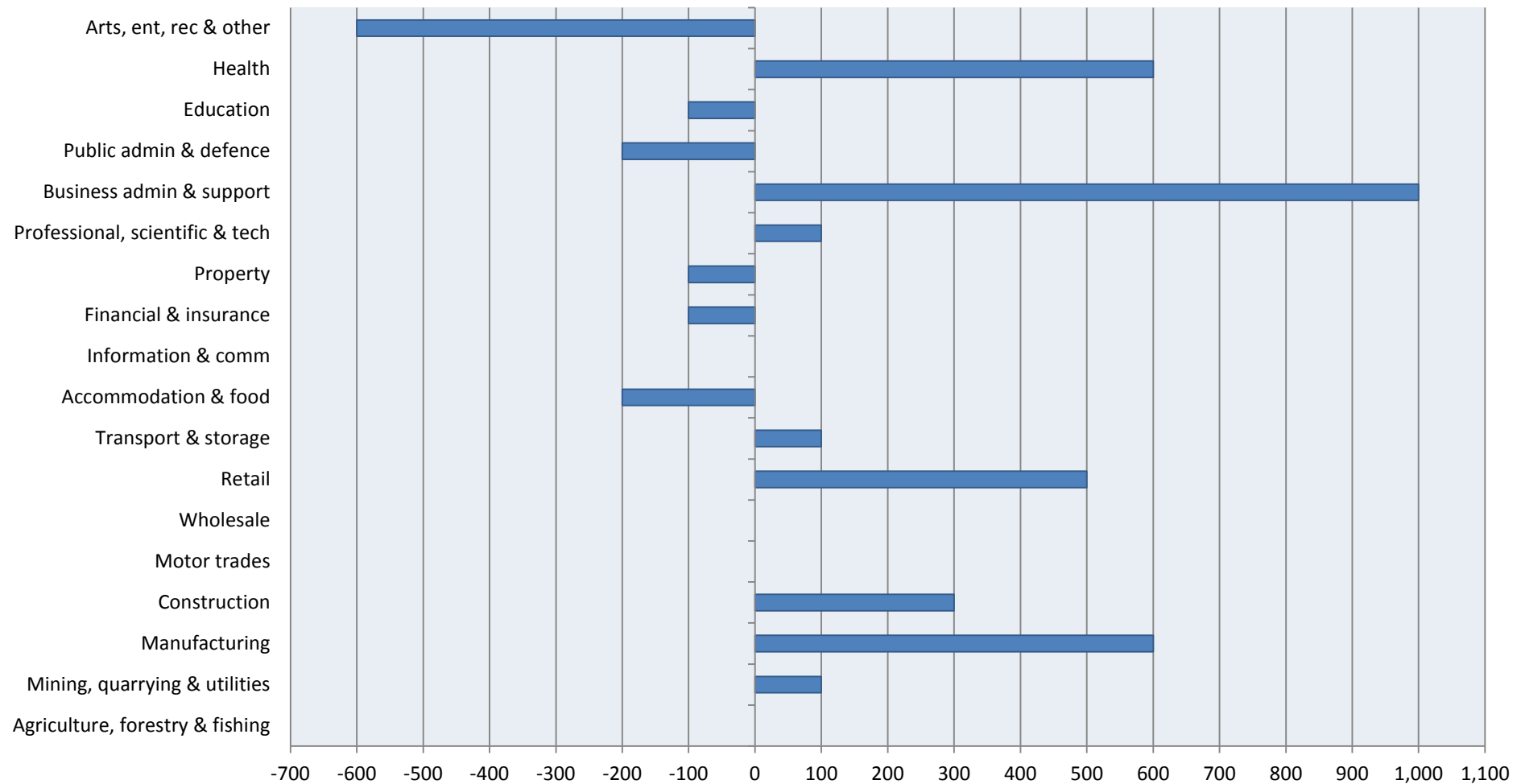
Change in Total Employment by Sector - Dundee City 2009-2014



Source: ONS Business Register and Employment Survey 2014.

- Between 2009 and 2014, the total number of employee jobs declined by approximately 1,900 jobs, with 75,600 jobs within all sectors in 2009, to 73,700 in 2014. The number of Information & Communication and Construction jobs declined by approximately 600 each between 2009 and 2014.

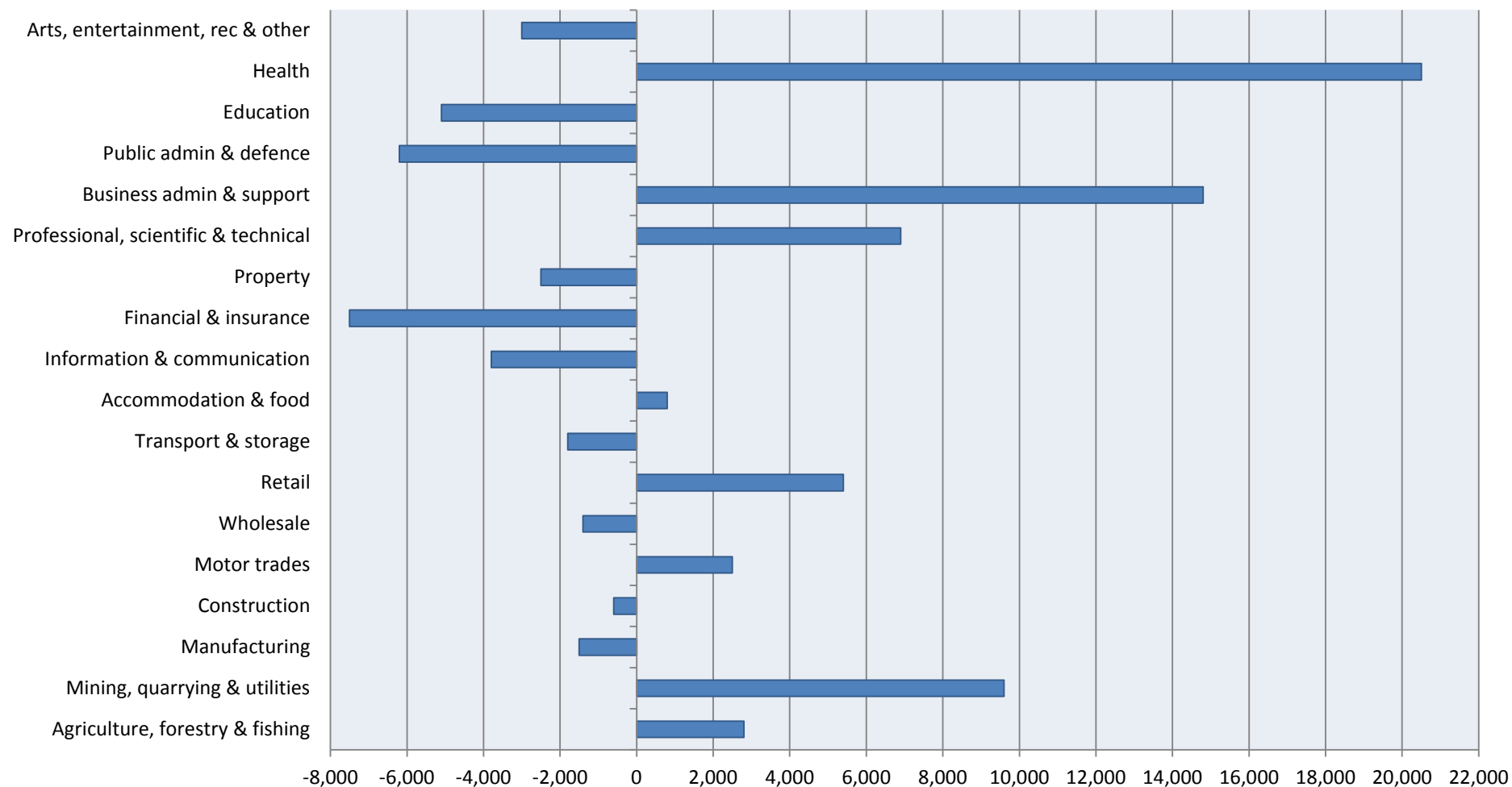
Change in Total Employees by Industry Sector - Dundee City 2013-2014



Source: ONS Business Register and Employment Survey 2014.

- Between 2013 and 2014, the total number of employee jobs increased by approximately 2,000 jobs, with approximately 71,700 jobs within all sectors in 2013, to 73,700 jobs within all sectors in 2014. There were approximately 1,000 more jobs in Business Admin and Support between 2013 and 2014.

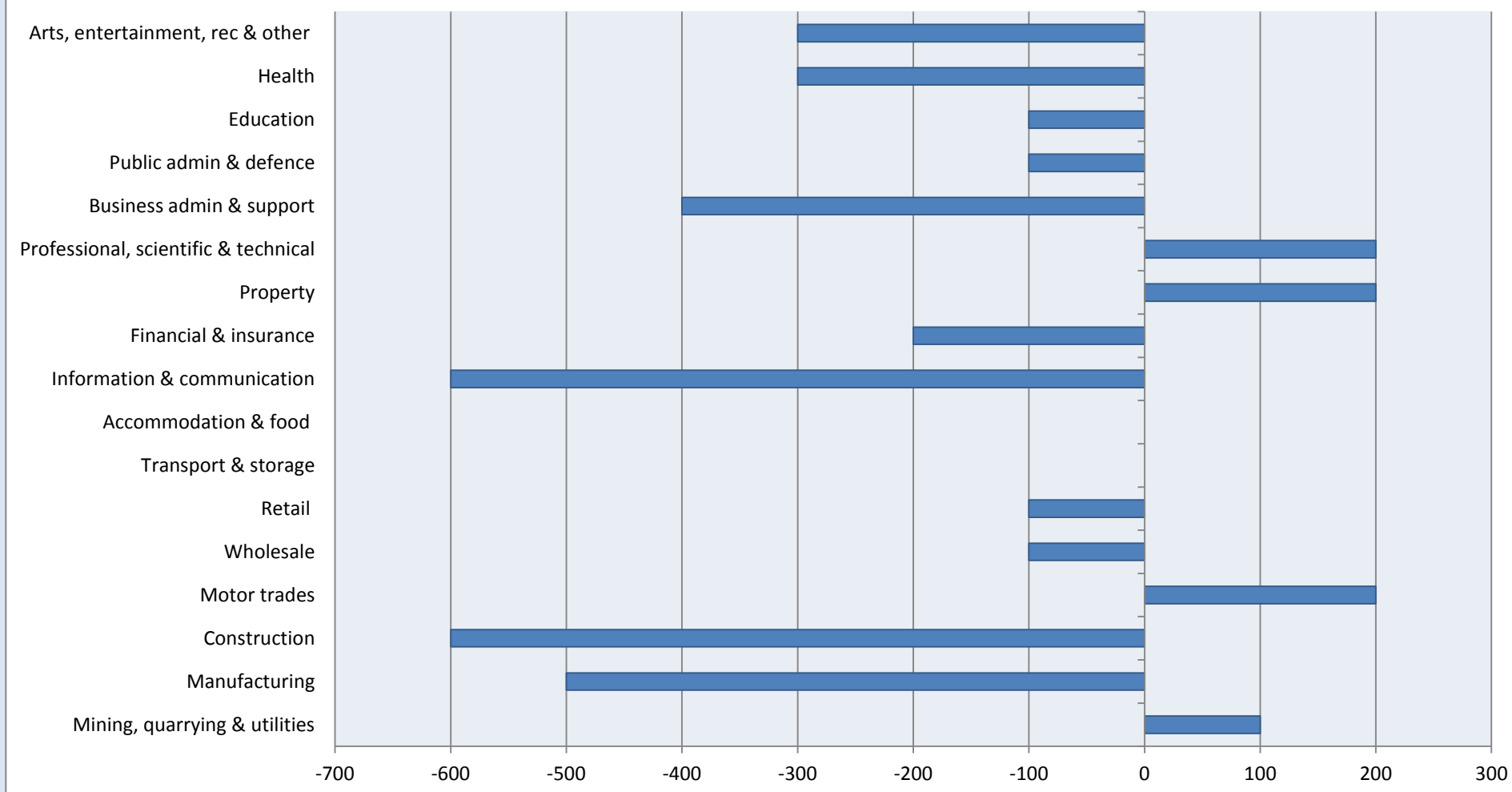
Change in Total Employees by Sector - Scotland 2009-2014



Source: ONS Business Register and Employment Survey 2014.

- The number of employees in Scotland between 2009 and 2014 increased by approximately 30,300, with approximately 20,500 more jobs being created within the health sector. By contrast, the number of jobs within the Dundee health sector declined over the same period.

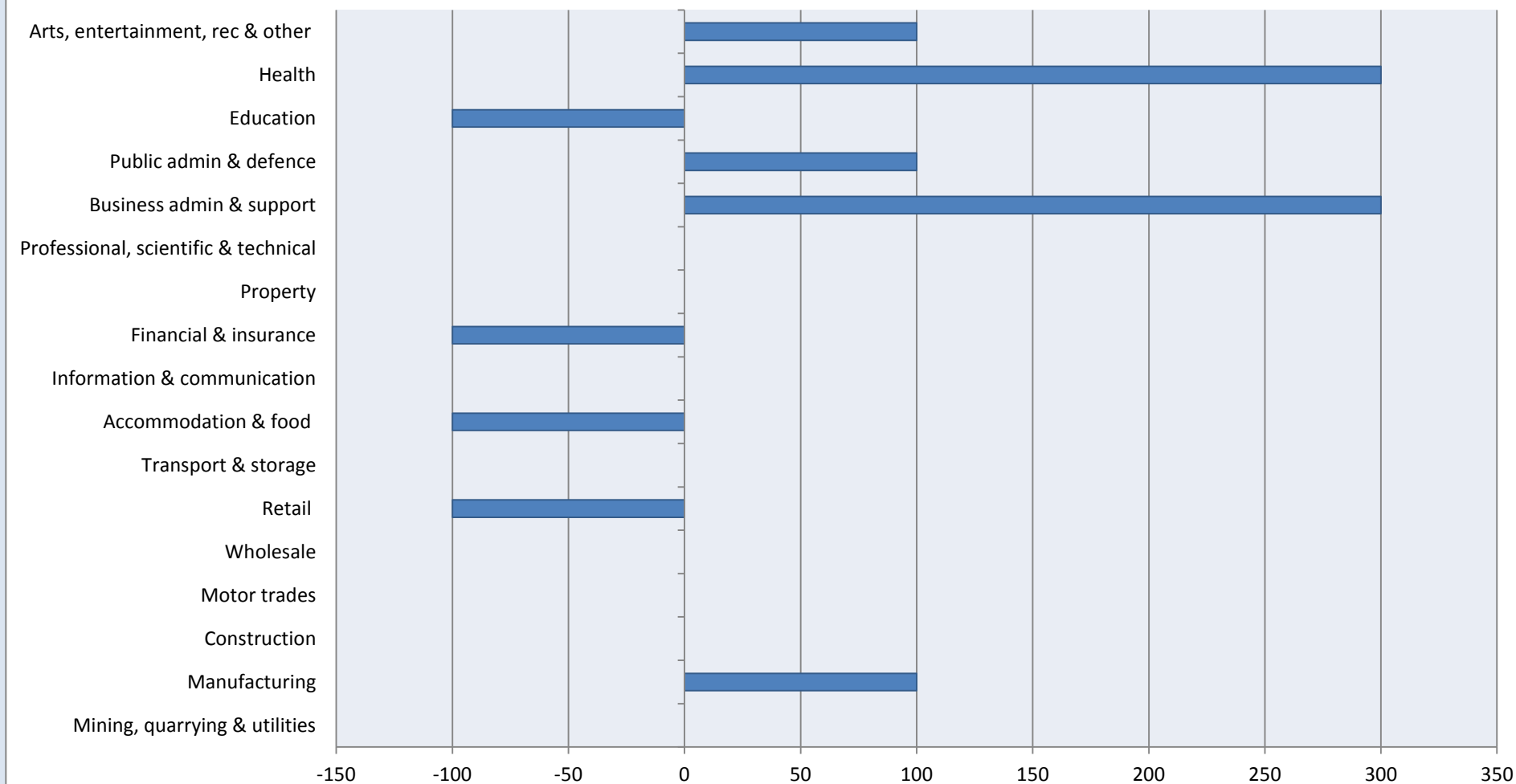
Change in Full-time Employees by Sector - Dundee City 2009-2014



Source: ONS Business Register and Employment Survey 2014.

- Between 2009 and 2014, the total number of full-time employee jobs declined by approximately 2,500, from 51,700 full-time jobs to 49,200. The Construction and Information & Communication sectors lost approximately 600 full-time jobs; 500 full-time manufacturing jobs were also lost.

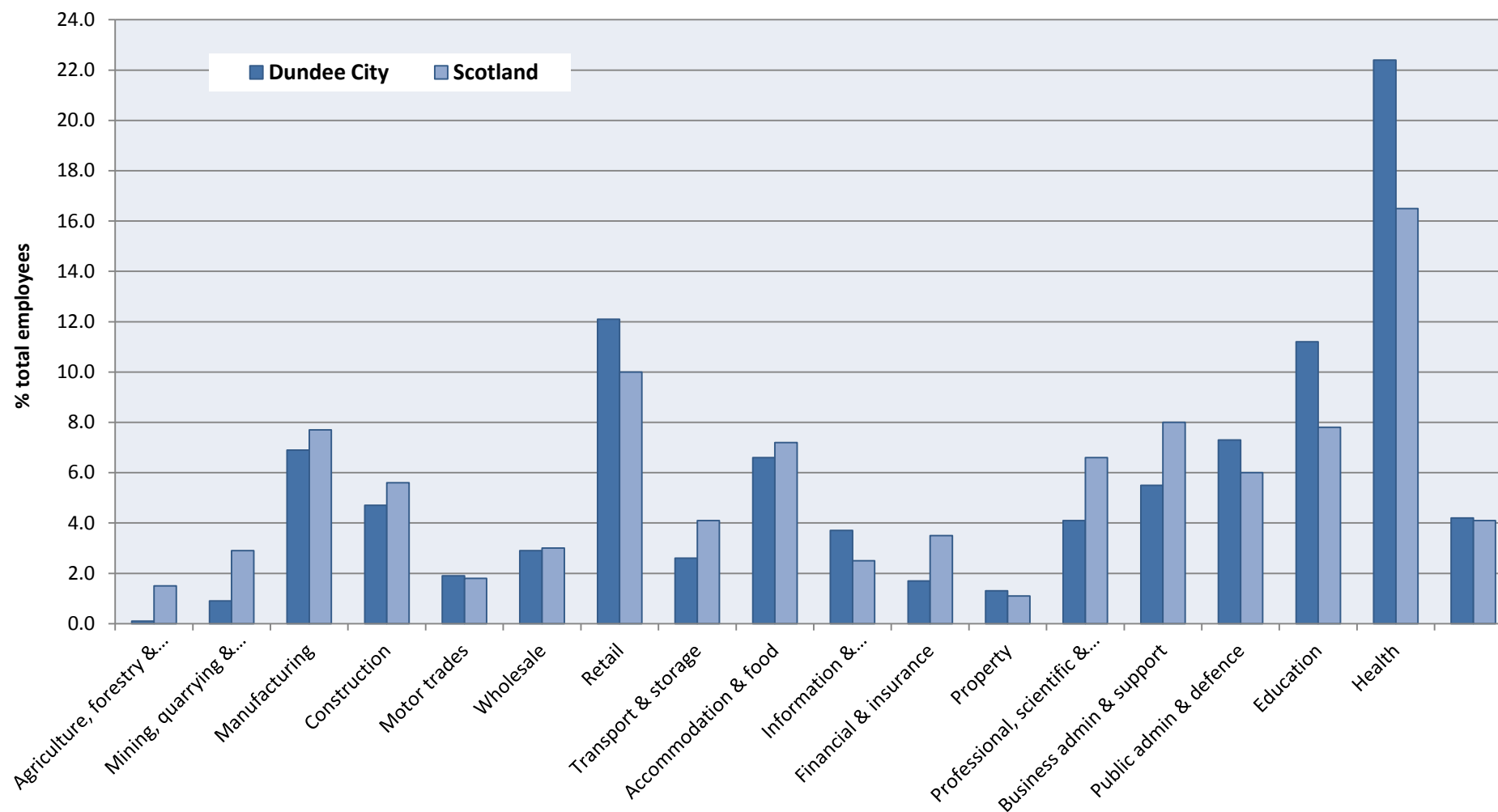
Change in Part-time Employees by Sector - Dundee City 2009-2014



Source: ONS Business Register and Employment Survey 2014.

- Between 2009 and 2014, the total number of part-time employee jobs increased by approximately 600, with 23,800 part-time jobs in 2009, to 24,400 part time jobs in 2014. Approximately 300 part-time jobs have been created within the Business Administration and Support Services sector.

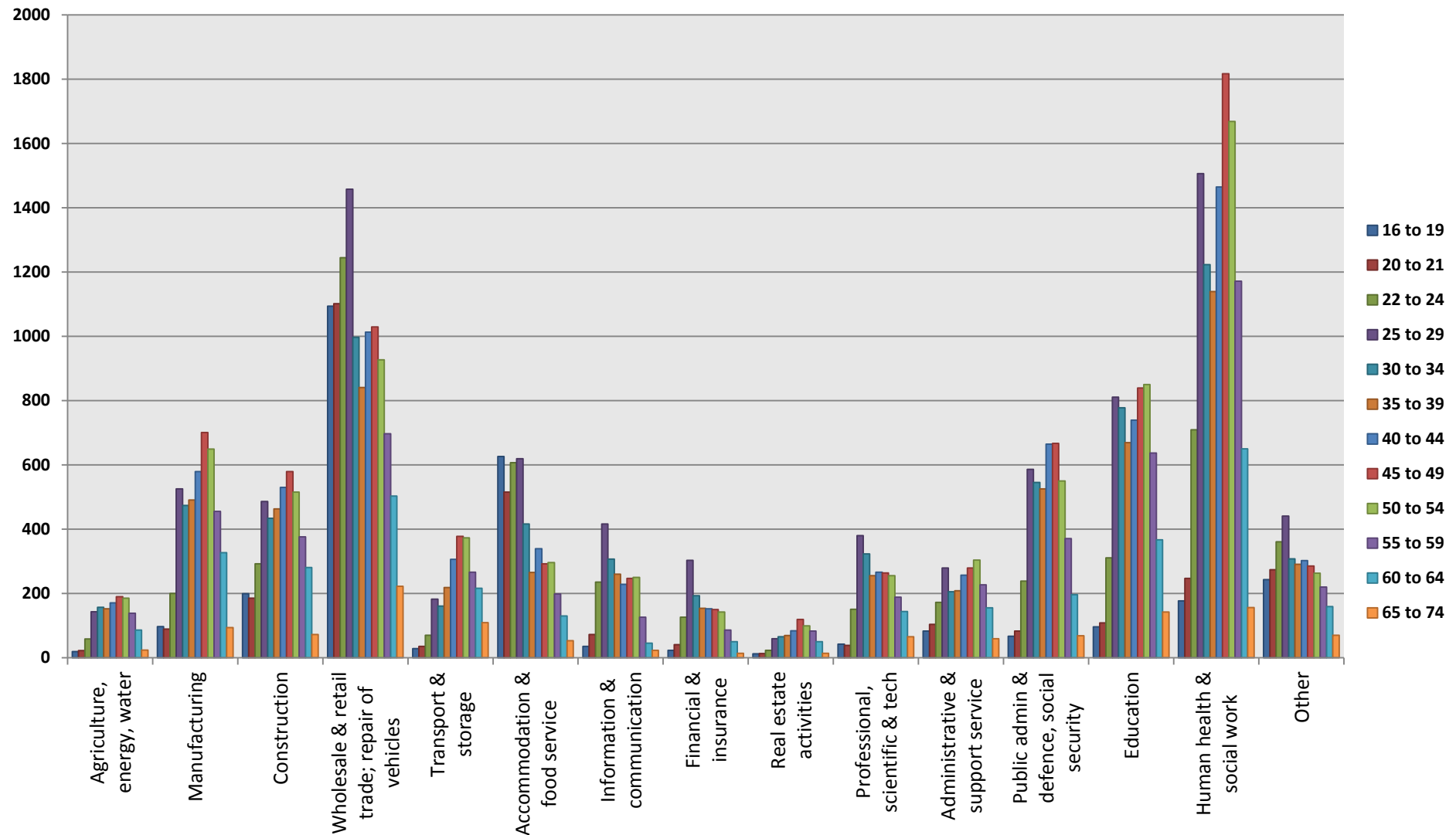
Employment Composition by Sector - Dundee City & Scotland 2014



Source: ONS Business Register and Employment Survey 2014.

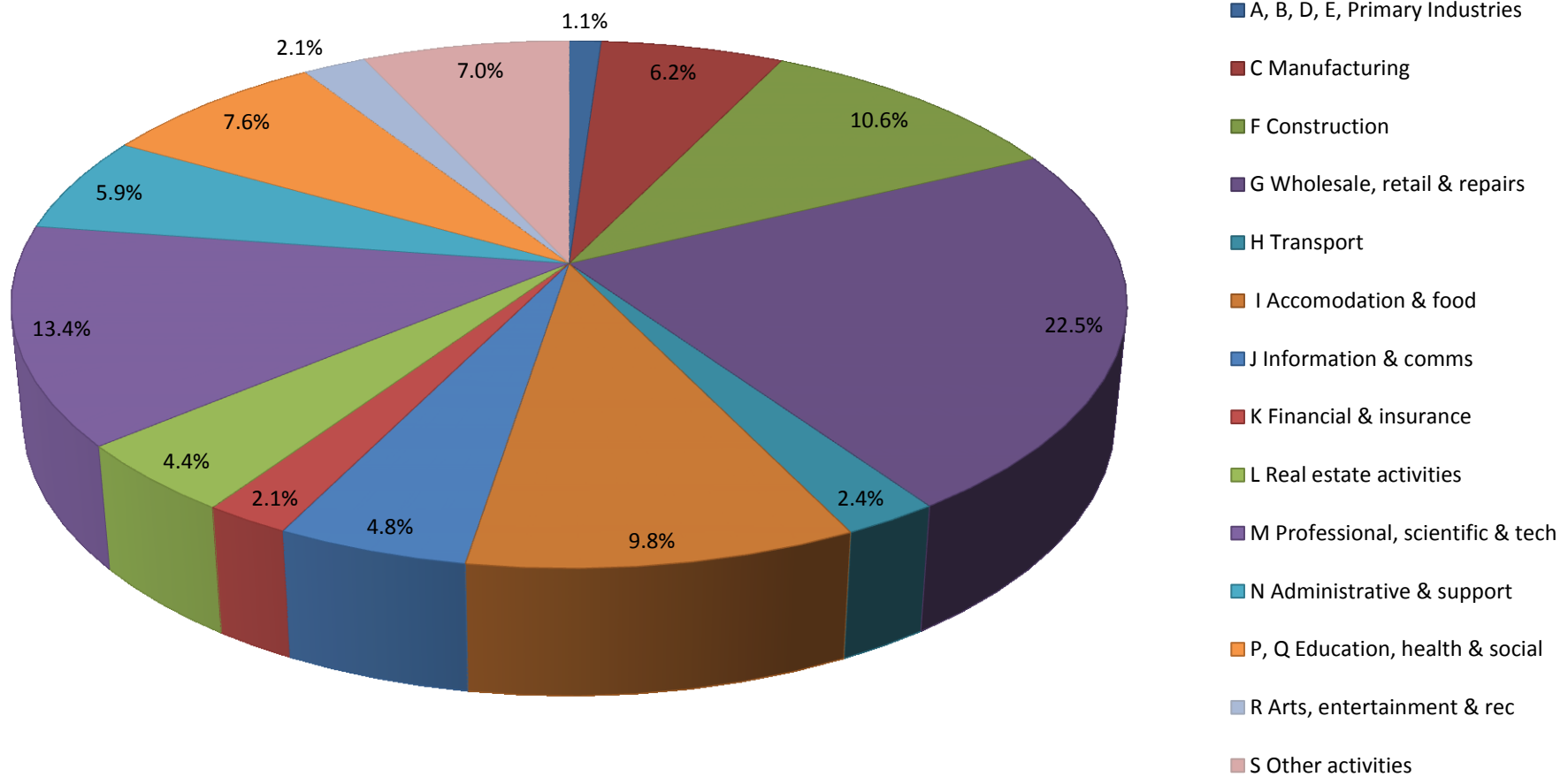
- Dundee has a comparatively larger proportion of its labour market employed within the public sector. In 2015, the public sector accounted for 30.2 per cent of all employment and 23.5 per cent of all Scottish employment. Public sector employment has declined in Dundee since 2008.

Employment by Industry Sector & Age: Dundee City 2011



Source: Scotland's Census 2011.

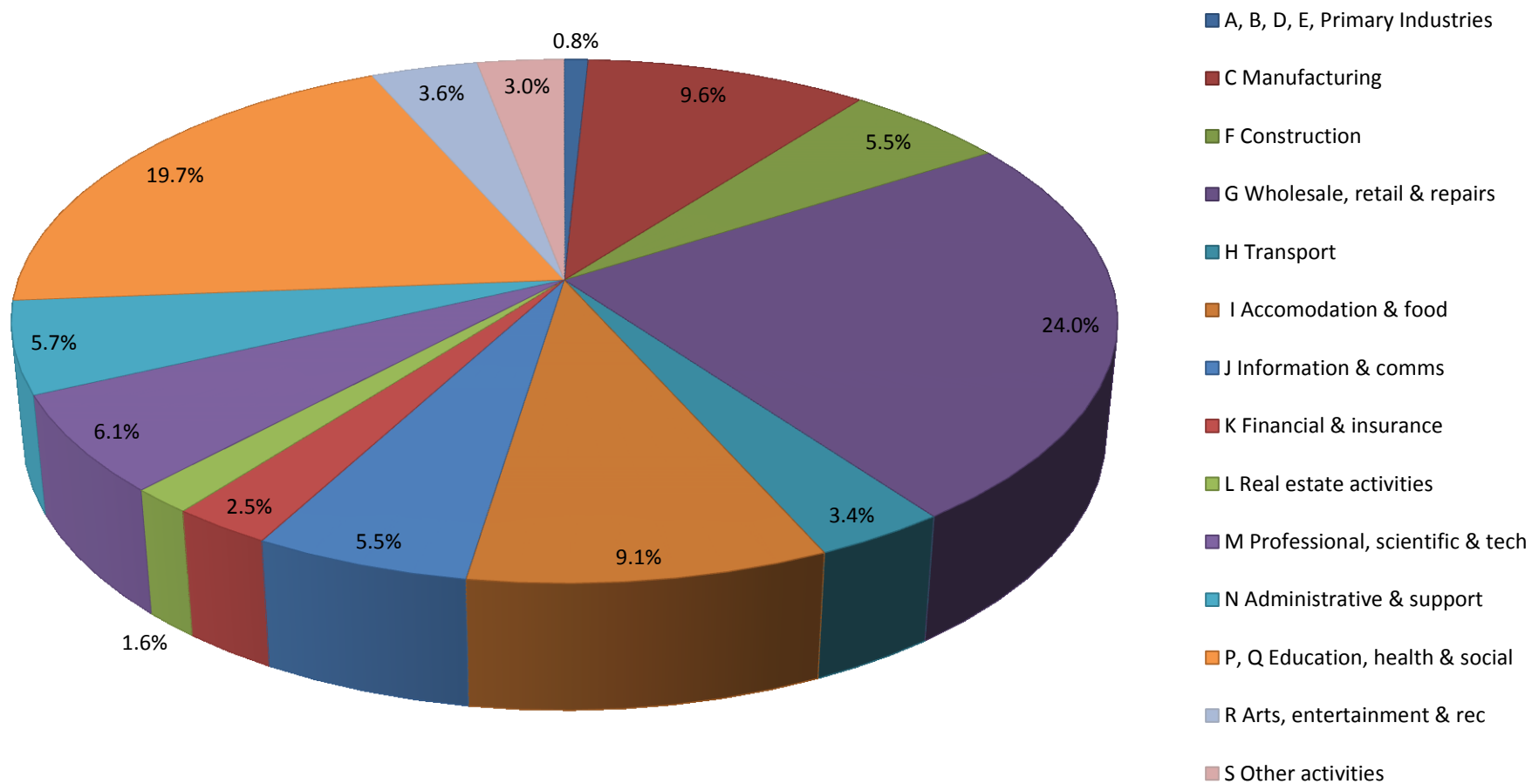
Number of Enterprises - Dundee City 2015



Source: The Scottish Government: Businesses in Scotland 2015.

- In 2015, the largest sectors in terms of number of enterprises in Dundee City were Wholesale, retail and repairs (840), Professional, Scientific and Technical (500) and Construction (395).

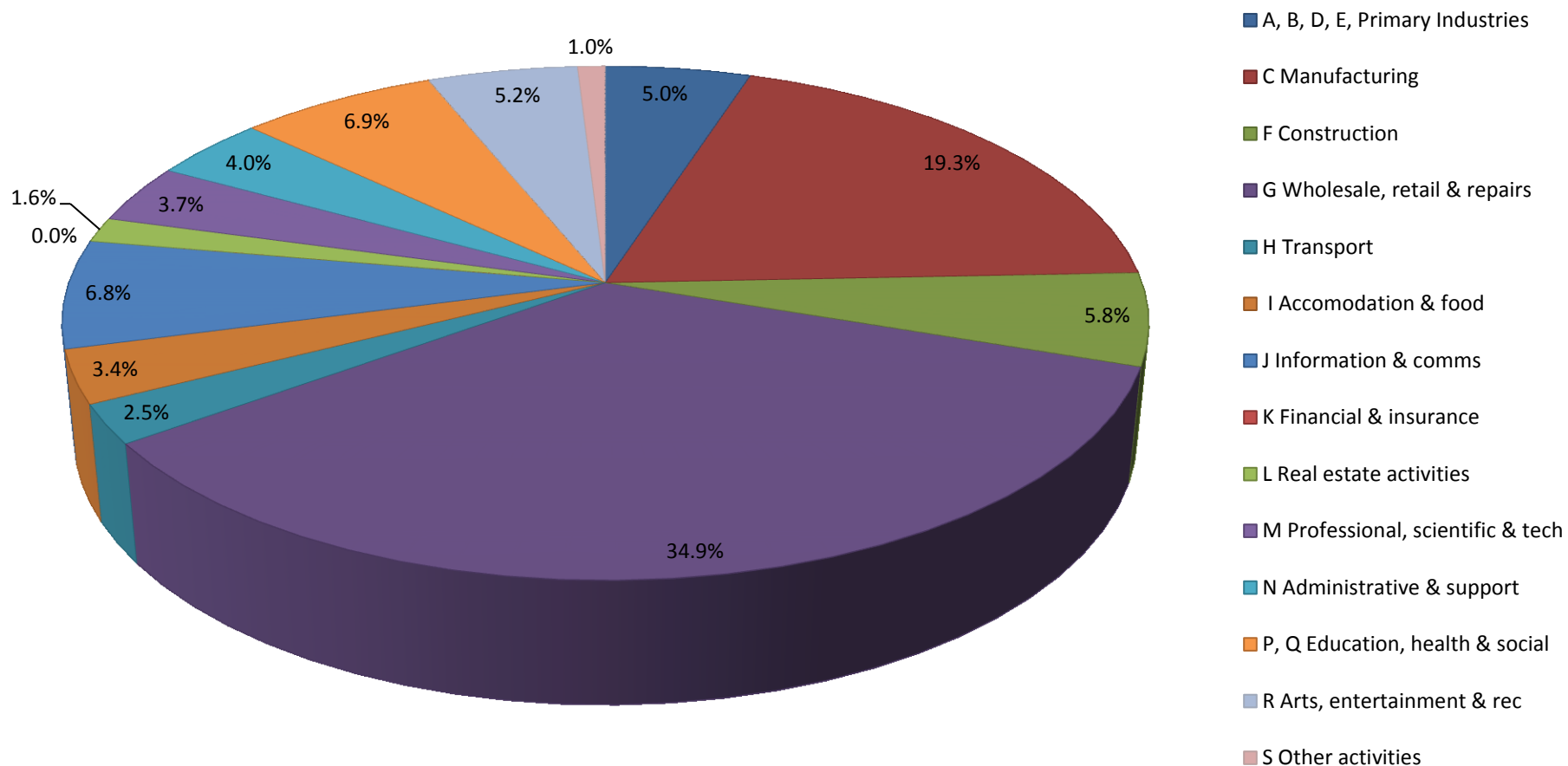
Total Employment - Dundee City 2015



Source: The Scottish Government: Businesses in Scotland 2015.

- By 2015, the largest sectors in terms of total employment within Dundee were Wholesale, Retail & Repairs (12,270 employees), Education, Human Health and Social Service (10,040 employees), Manufacturing (4,910 employees) and Accommodation and Food Services (4,650 employees).

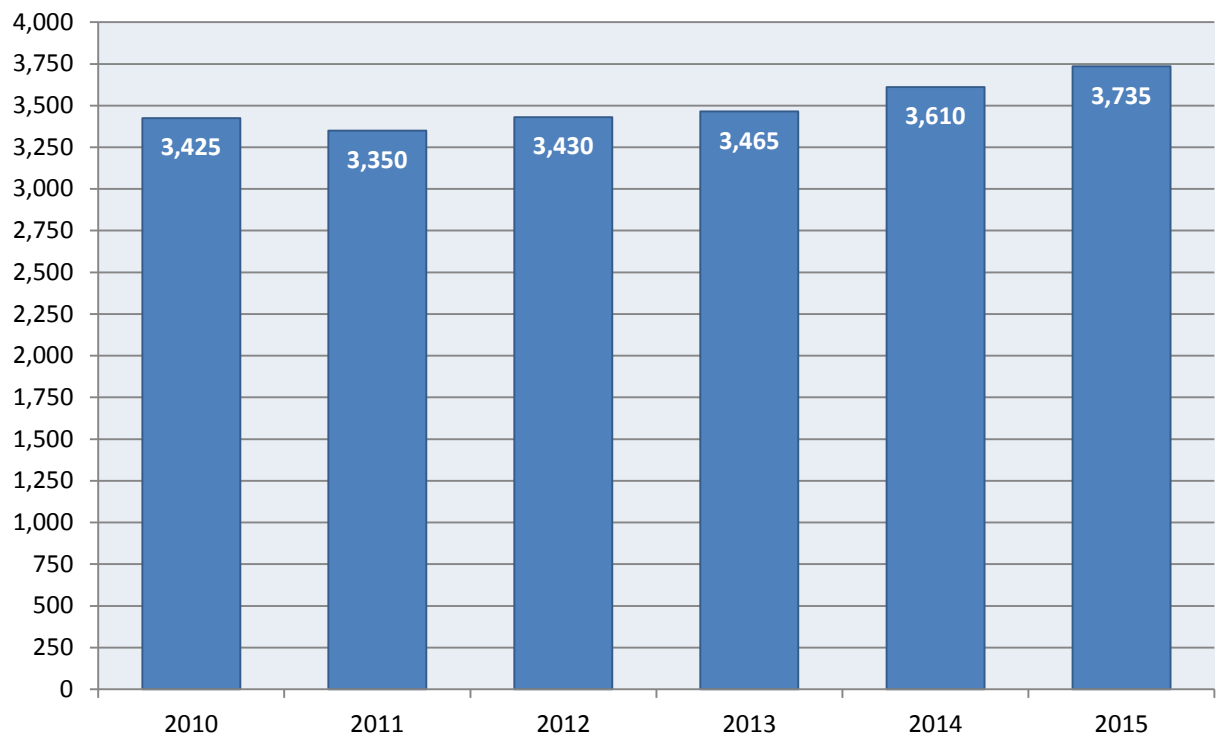
Percentage of Turnover (£ millions) - Dundee City 2015



Source: The Scottish Government: Businesses in Scotland 2015.

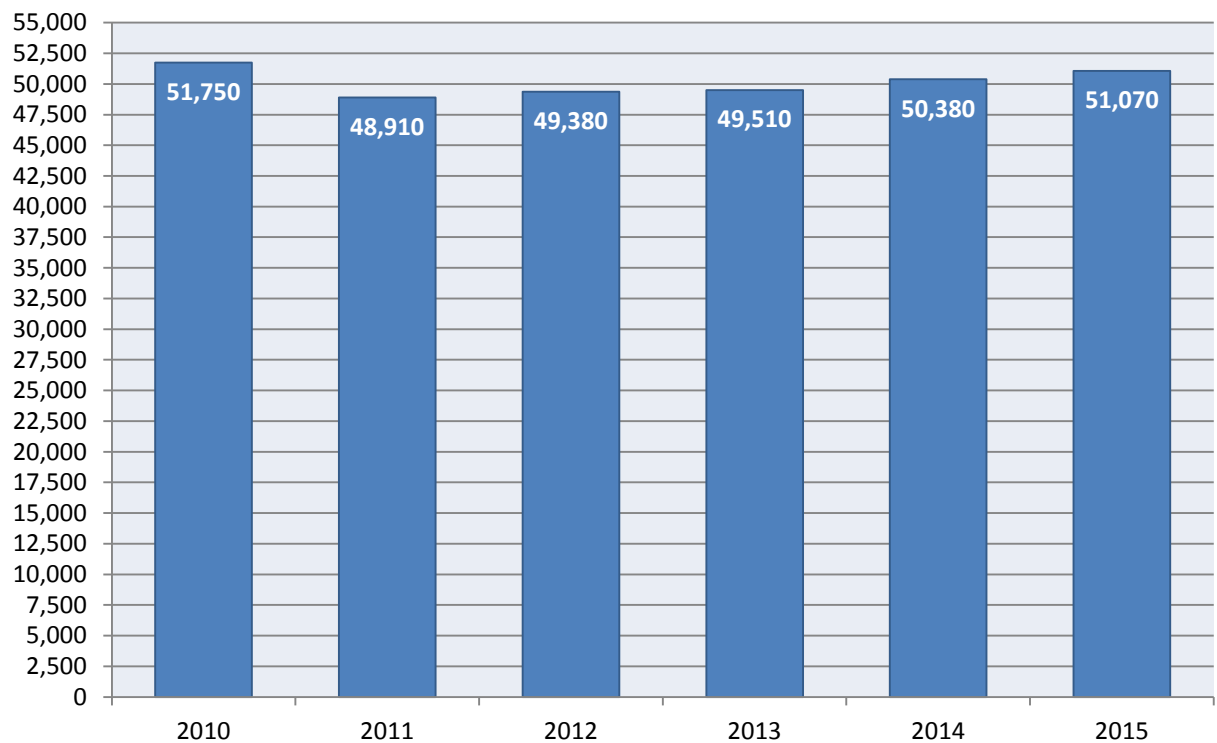
- By 2015, the industry sectors with the largest annual turnover in Dundee were Wholesale, Retail & Repairs (£1,760 million), Manufacturing (\$975 million), Education, Human Health and Social Service (£346 million) and Information and Communication (£344 million).

Number of enterprises - Dundee City 2010-2015



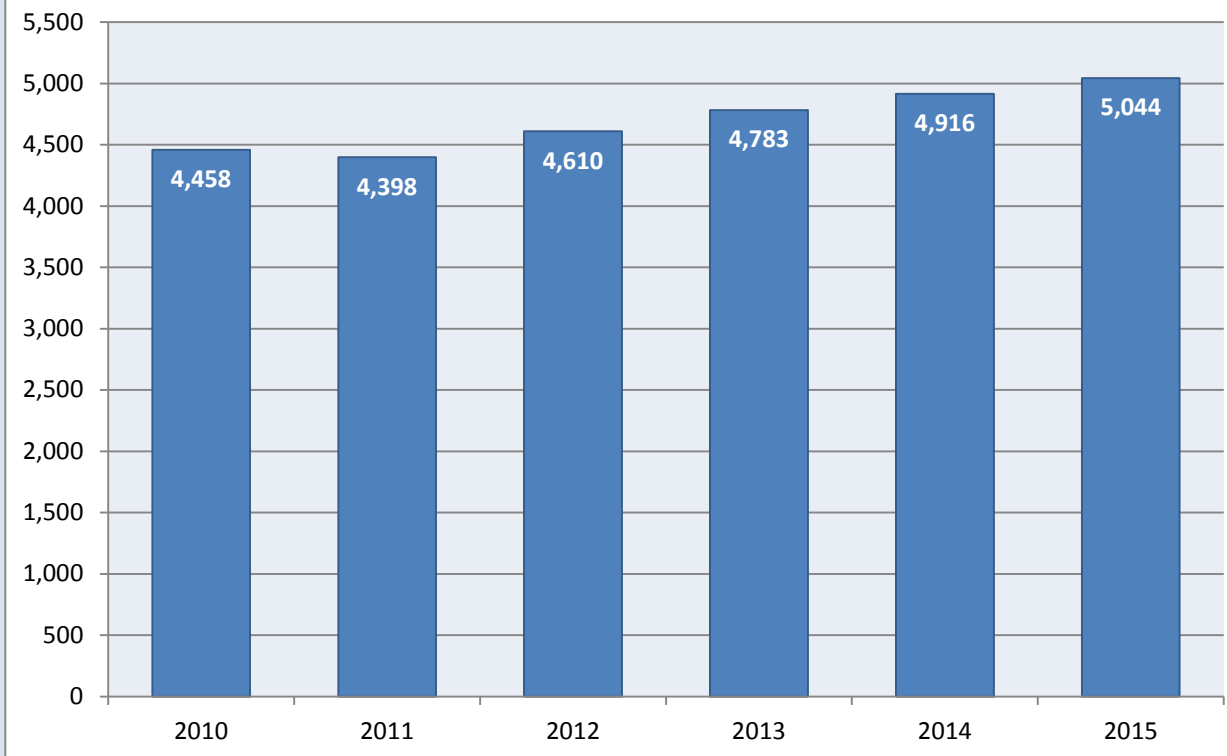
Source: The Scottish Government: Businesses in Scotland 2015.

Total employment - Dundee City 2010-2015



Source: The Scottish Government: Businesses in Scotland 2015.

Turnover (£ millions) - Dundee City 2010-2015



Source: *The Scottish Government: Businesses in Scotland 2015*.

- According to the Scottish Government's Business in Scotland 2015 publication, between 2010 and 2015, the number of enterprises in Dundee City increased from 3,425 to 3,735. Total employment within these enterprises was 51,070, having returned to the approximate same level as 2010. Turnover for all enterprise in Dundee City increased from £4,458 million in 2010 to £5,044 million in 2015.
- The number of people employed within all enterprise in Dundee City fell to 48,910 in 2011. By 2015, the number of employees had returned to approximate level recorded in 2010, with 51,070 people employed in 2015.
- In 2015, Dundee's largest industrial sector was (G) Wholesale, Retail and Repairs, with 840 enterprises, 12,270 employees and an annual turnover of £1,760 million.
- Between 2010 and 2015, the number of enterprises and total turnover for Dundee City has increased, whilst the total employment has experienced comparatively weaker growth. According to the Scottish Government's Business in Scotland data, productivity in Dundee City has increased in spite of weak employment growth.

Number of registered enterprises in Dundee City and their total employment and turnover, March 2010-2015		
	2015	2010
0-49 employees		
Number of enterprises	3,165	2,830
Total employment	16,100	14,420
Turnover (£ millions)	1,145	1,110
50-249 employees		
Number of enterprises	170	180
Total employment	7,690	7,490
Turnover (£ millions)	722	632
250+ employees		
Number of enterprises	395	415
Total employment	27,280	29,840
Turnover (£ millions)	3,127	2,717
Total		
Number of enterprises	3,735	3,425
Total employment	51,070	51,750
Turnover (£ millions)	5,044	4,458

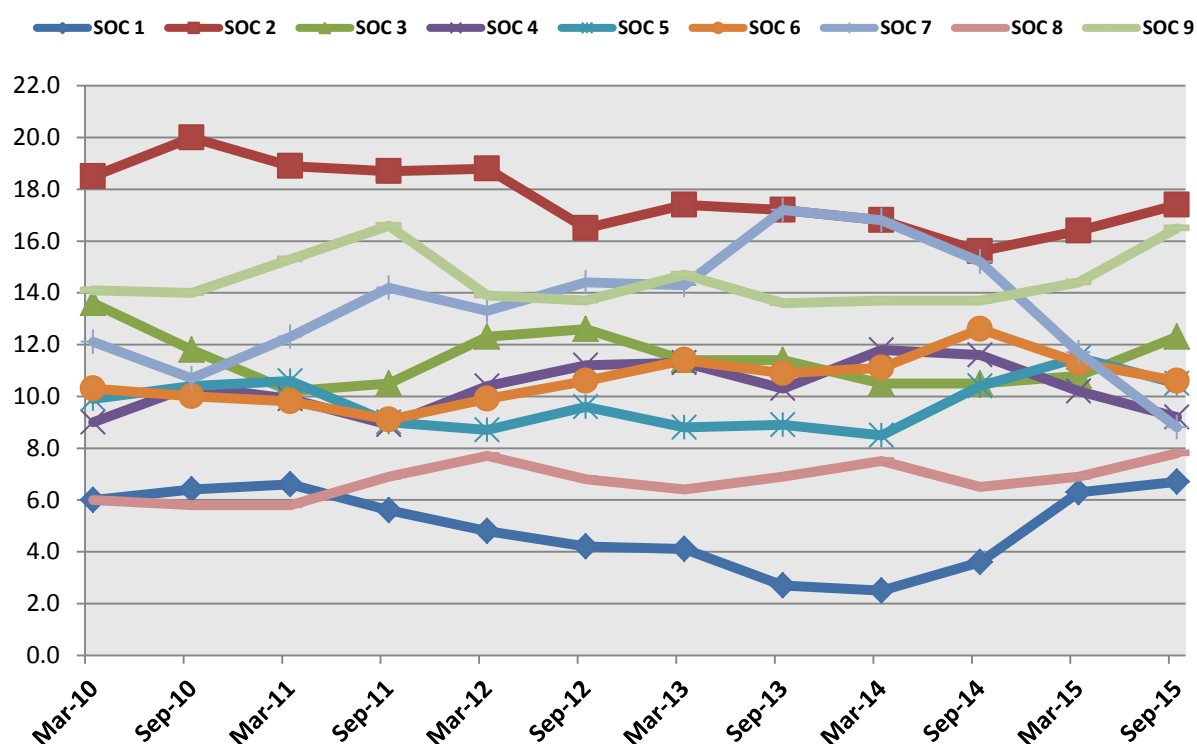
Source: The Scottish Government: Business in Scotland 2015.

Number of registered enterprises in Dundee City and their total employment and turnover by sector, March 2010-2015		
	2015	2010
A, B, D, E Primary industries		
Number of enterprises	40	30
Total employment	410	320
Turnover (£ millions)	254	91
C Manufacturing		
Number of enterprises	230	215
Total employment	4,910	5,590
Turnover (£ millions)	975	780
F Construction		
Number of enterprises	395	405
Total employment	2,820	3,460
Turnover (£ millions)	293	409
G Wholesale, retail and repairs		
Number of enterprises	840	835
Total employment	12,270	12,490
Turnover (£ millions)	1,760	1,653
H Transport and storage		
Number of enterprises	90	90
Total employment	1,720	1,770
Turnover (£ millions)	125	118
I Accommodation and food service		
Number of enterprises	365	340
Total employment	4,650	4,080

Turnover (£ millions)	169	158
J Information and communication		
Number of enterprises	180	150
Total employment	2,800	3,060
Turnover (£ millions)	344	323
K Financial and insurance activities		
Number of enterprises	80	70
Total employment	1,300	1,670
Turnover (£ millions)	NA	NA
L Real estate activities		
Number of enterprises	165	130
Total employment	800	630
Turnover (£ millions)	79	53
M Professional, scientific and technical		
Number of enterprises	500	365
Total employment	3,090	2,450
Turnover (£ millions)	187	129
N Administrative and support service		
Number of enterprises	220	185
Total employment	2,900	3,590
Turnover (£ millions)	201	188
P, Q Education, human health and social		
Number of enterprises	285	270
Total employment	10,040	9,930
Turnover (£ millions)	346	216
R Arts, entertainment and recreation		
Number of enterprises	80	90
Total employment	1,860	1,430
Turnover (£ millions)	263	287
S Other service activities		
Number of enterprises	260	250
Total employment	1,510	1,300
Turnover (£ millions)	48	52
Total		
Number of enterprises	3,735	3,425
Total employment	51,070	51,750
Turnover (£ millions)	5,044	4,458

Source: The Scottish Government: *Business in Scotland 2015*.

Employment by Occupation (%) - Dundee City

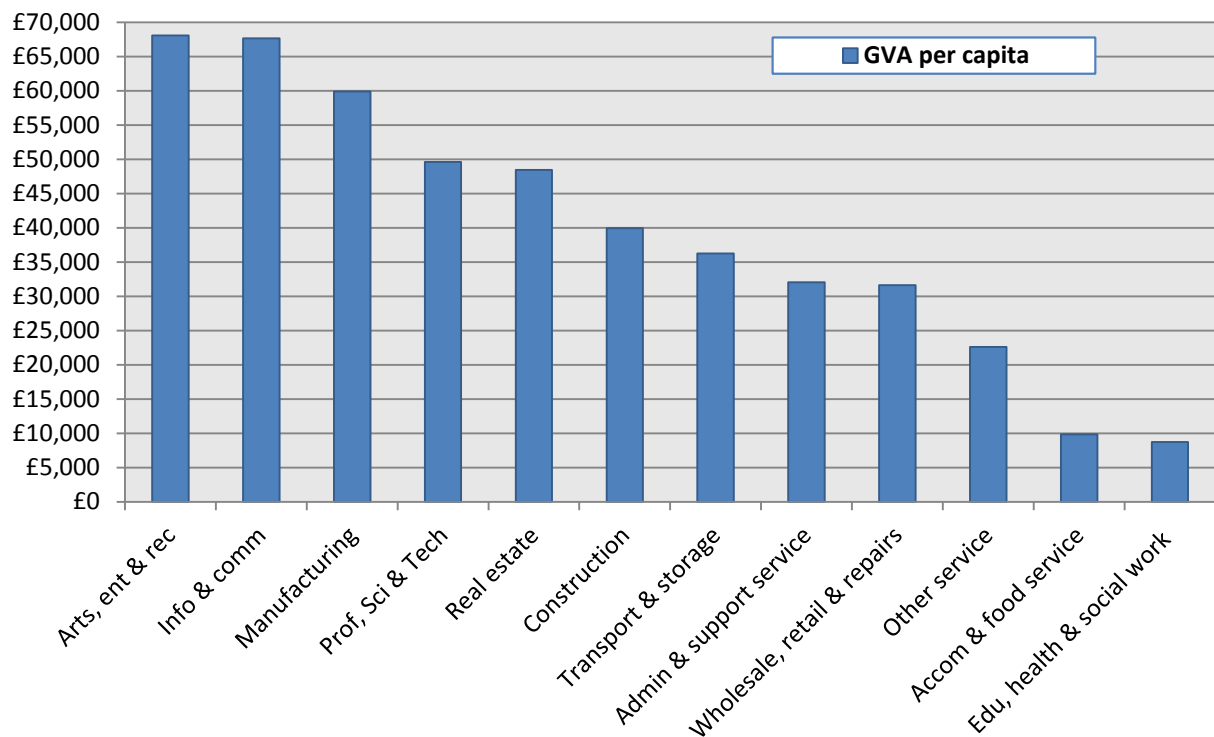


Source: ONS Annual Population Survey, September 2015

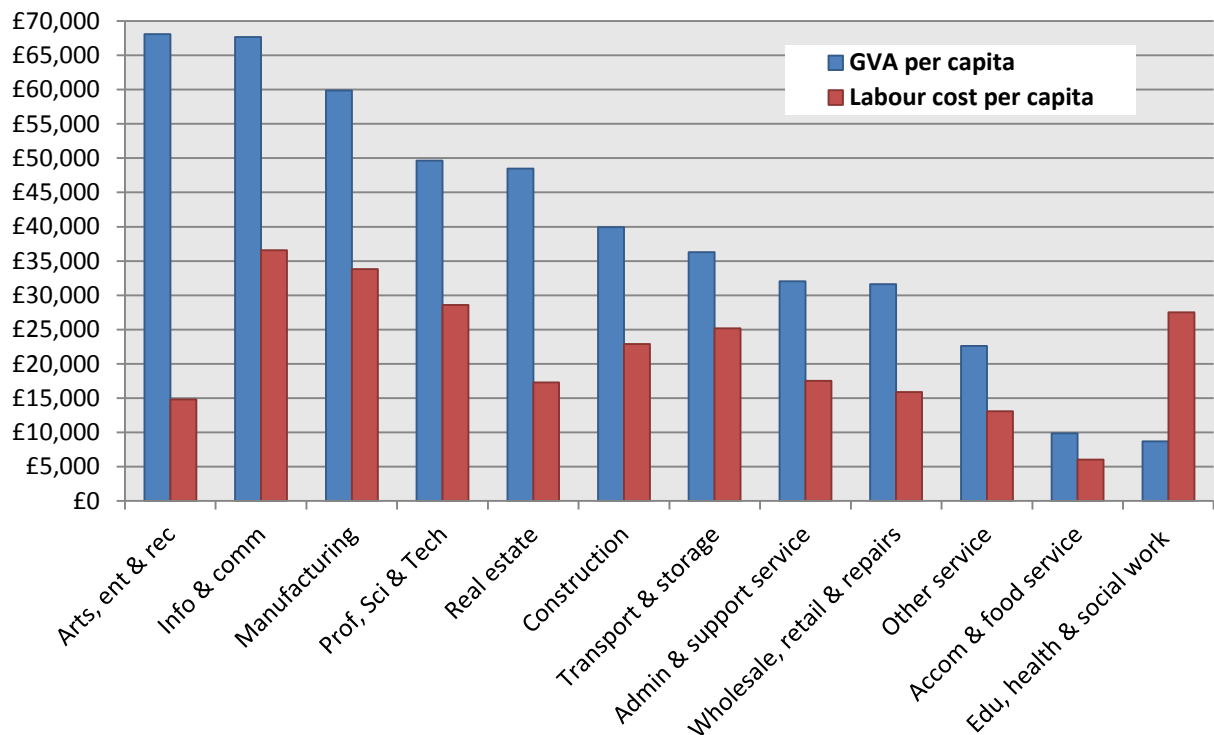
SOC 2010 Employment Designations:

- SOC 1: Managers, Directors and Senior Officials
- SOC 2: Professional Occupations
- SOC 3: Associate Professional & Technical Occupations
- SOC 4: Administrative and Secretarial Occupations
- SOC 5: Skilled Trades Occupations
- SOC 6: Caring, Leisure and Other Service Occupations
- SOC 7: Sales and Customer Service Occupations
- SOC 8: Process, Plant and Machine Operatives
- SOC 9: Elementary Occupations

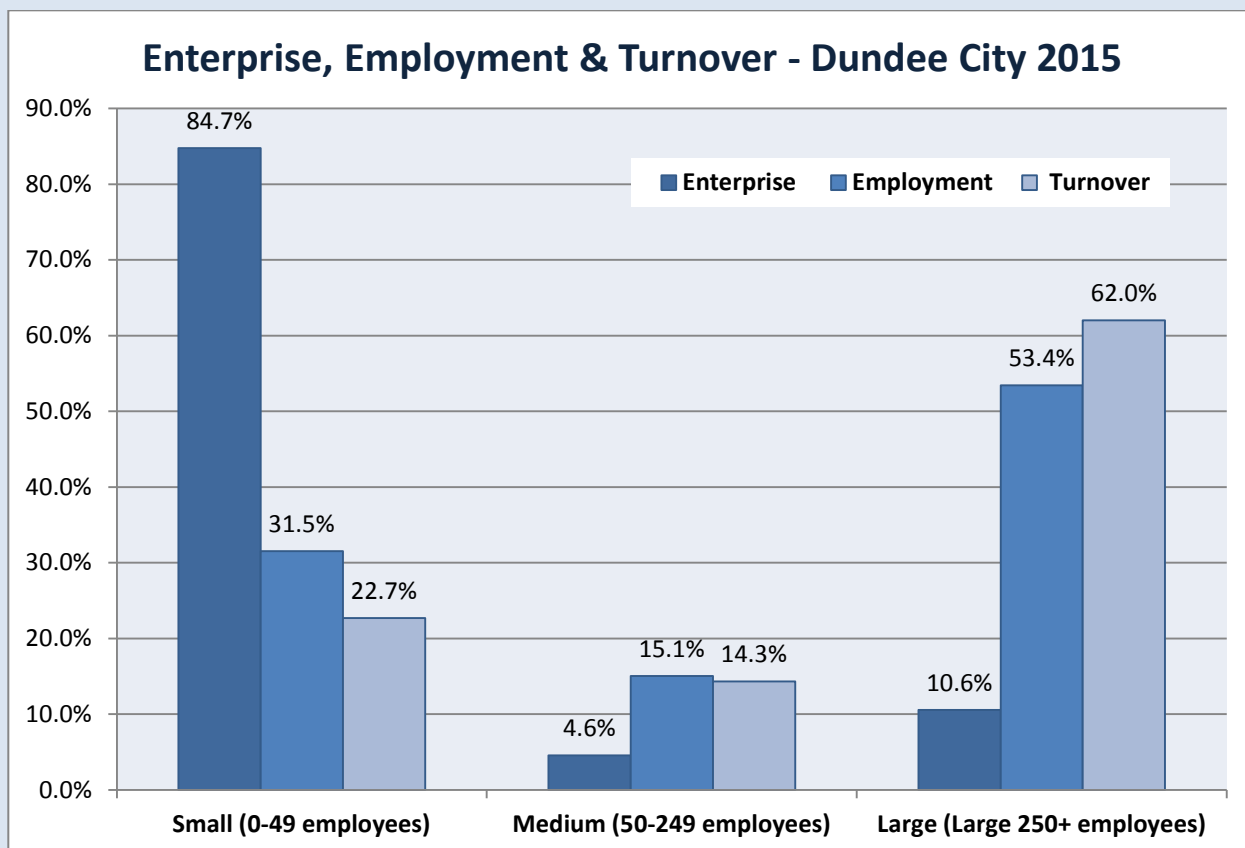
Productivity/GVA per capita (SOC 07) - Dundee 2013



GVA & Labour Cost per capita (SOC 07) - Dundee 2013



Source: Scottish Annual Business Statistics, 2013.



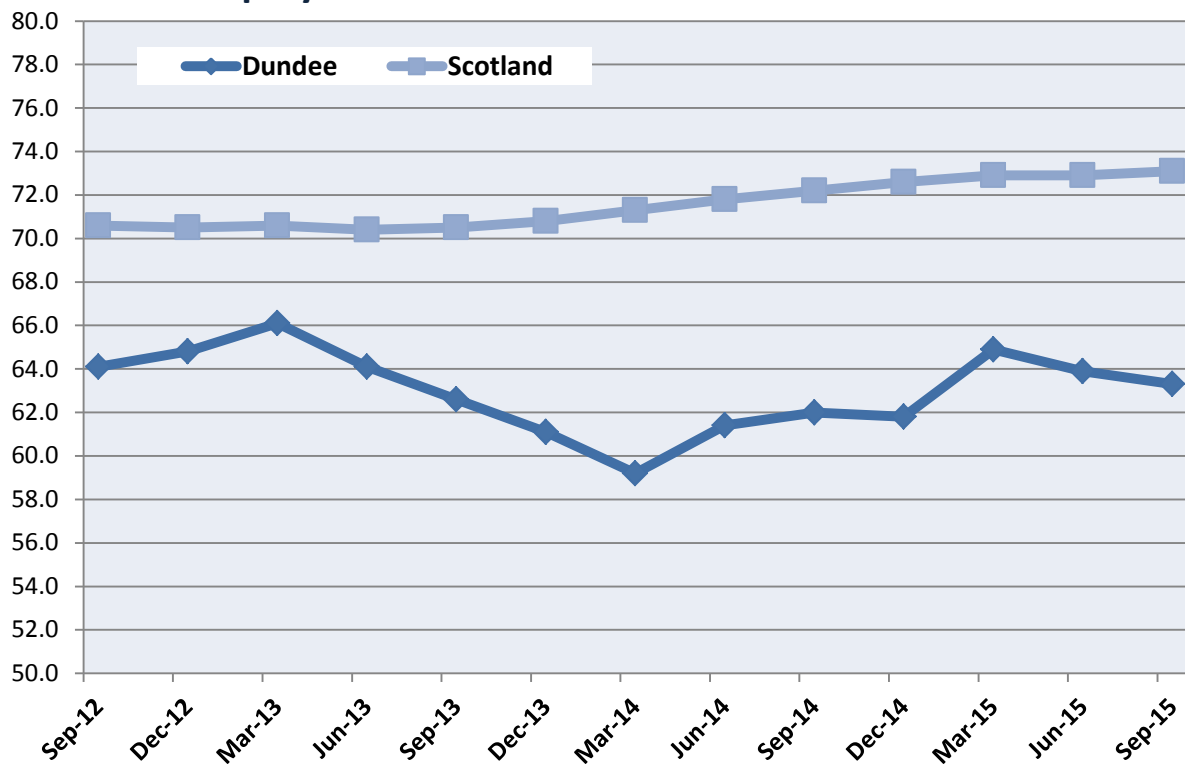
Source: The Scottish Government: Businesses in Scotland 2015.

- Large enterprise with more than 250 employees, account for 53.4 per cent of all employment and 62.0 per cent of total turnover in Dundee.
- Small enterprise, with total employees numbering 49 and less, account for 84.7 per cent of the total number of enterprises and approximately 22.7 per cent of total turnover.

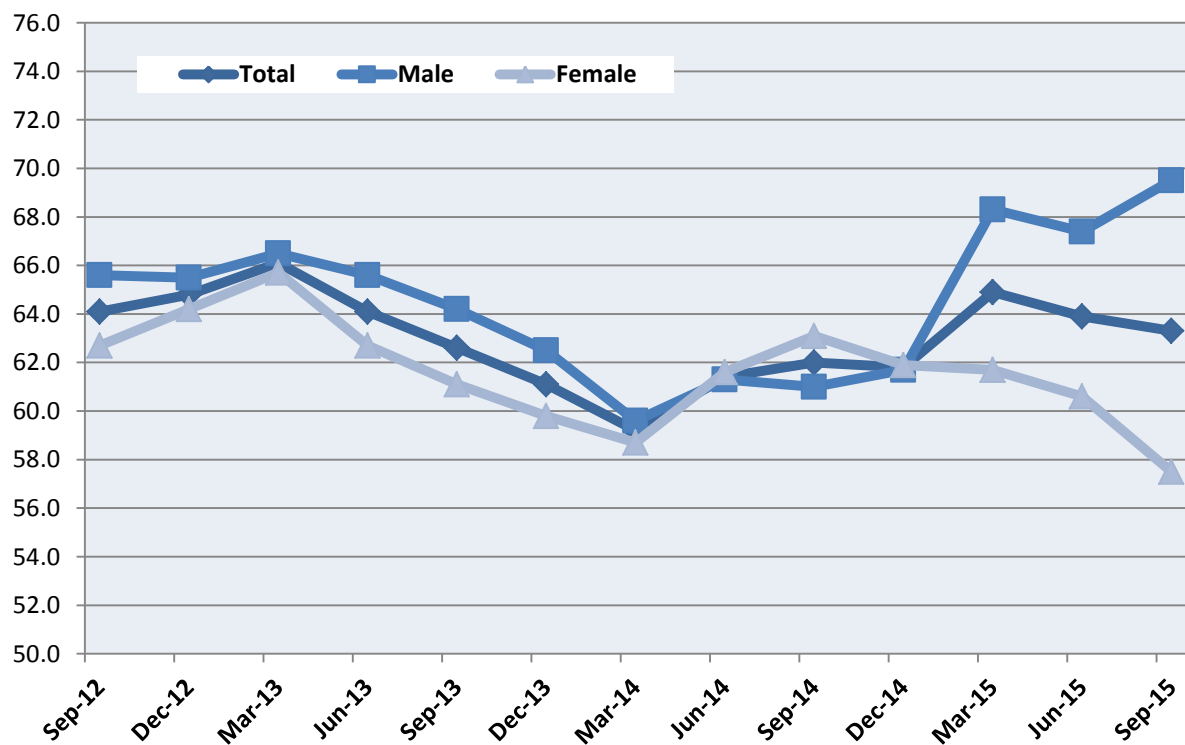
Employment

- In September 2015, 63,400 people and 63.3 per cent of the Dundee City working age population were in employment. The Scottish national average at this time was 73.1 per cent and almost 10 per cent higher than the Dundee City employment rate.
- The employment rate for males in Dundee City in September 2015 was 69.5 per cent and the employment rate for females was 57.5 per cent. Of those in employment in Dundee City, 57.7 per cent were employees and 5.6 per cent were self-employed.
- The employment rate for Dundee City reached a historic low in March 2014, with 59.2 per cent of the working age population in employment. In September 2008, the employment rate for Dundee City was 70.2 per cent, demonstrating the disproportional impact of the economic recession across different regional labour markets.
- Dundee City has had a historically lower headline employment rate than other Scottish local authorities. This is in part accounted for by the larger economically inactive population, proportionally larger number of benefit recipients, large population of younger persons and large student population.
- Given normal economic circumstances, Dundee has a smaller potential labour market than the Scottish national average. The abnormal levels of economic inactivity now present in Dundee City have contributed to a large fall in unemployment with only a modest increase in employment. This suggests that rather than more Dundee City residents gaining employment, more and more people are being excluded from the labour market.

Employment Rate - Dundee & Scotland 2012-15

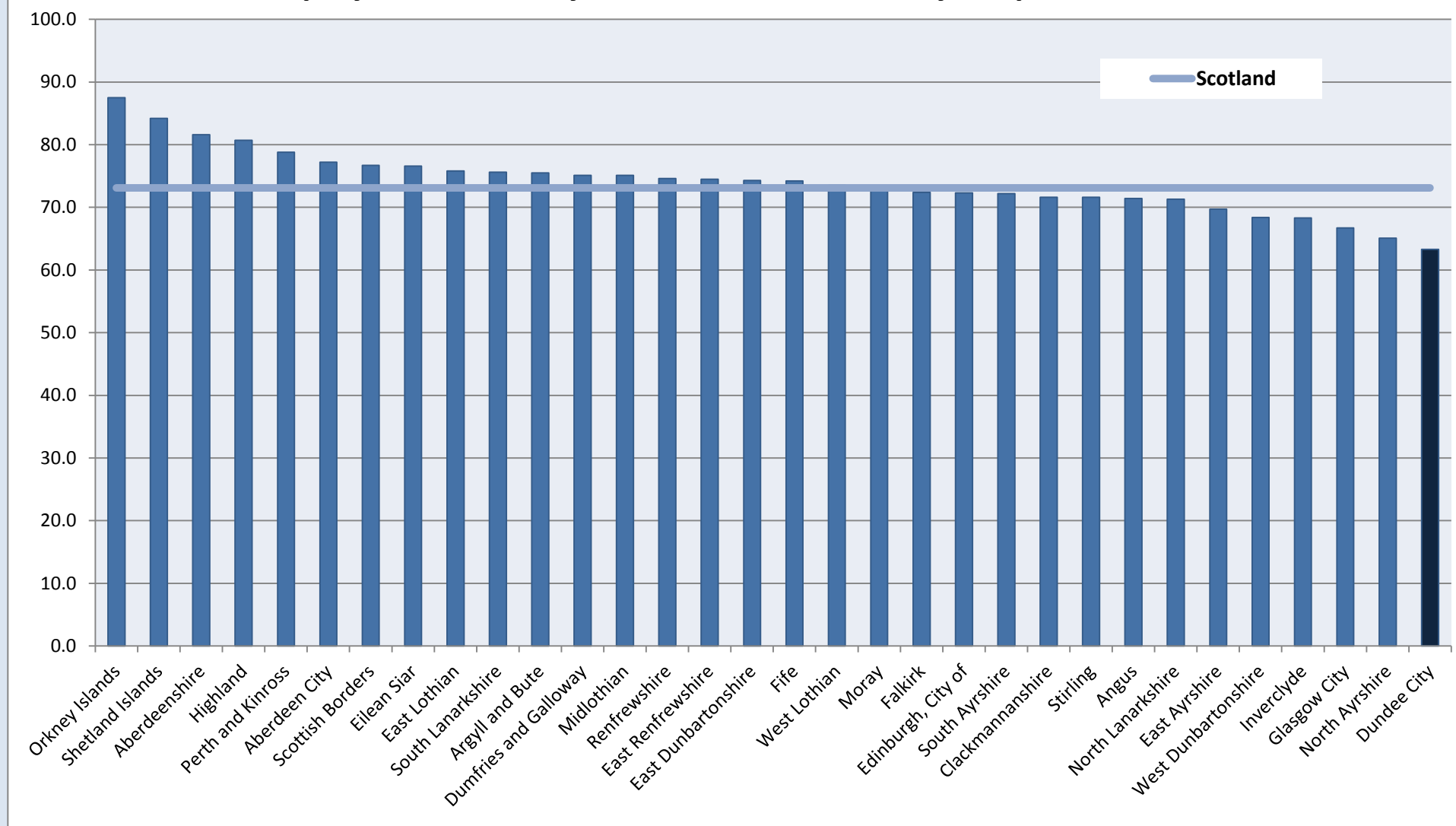


Employment Rate by Sex - Dundee City 2012-15



Source: ONS Annual Population Survey.

Employment Rates by Scottish Local Authority - September 2015



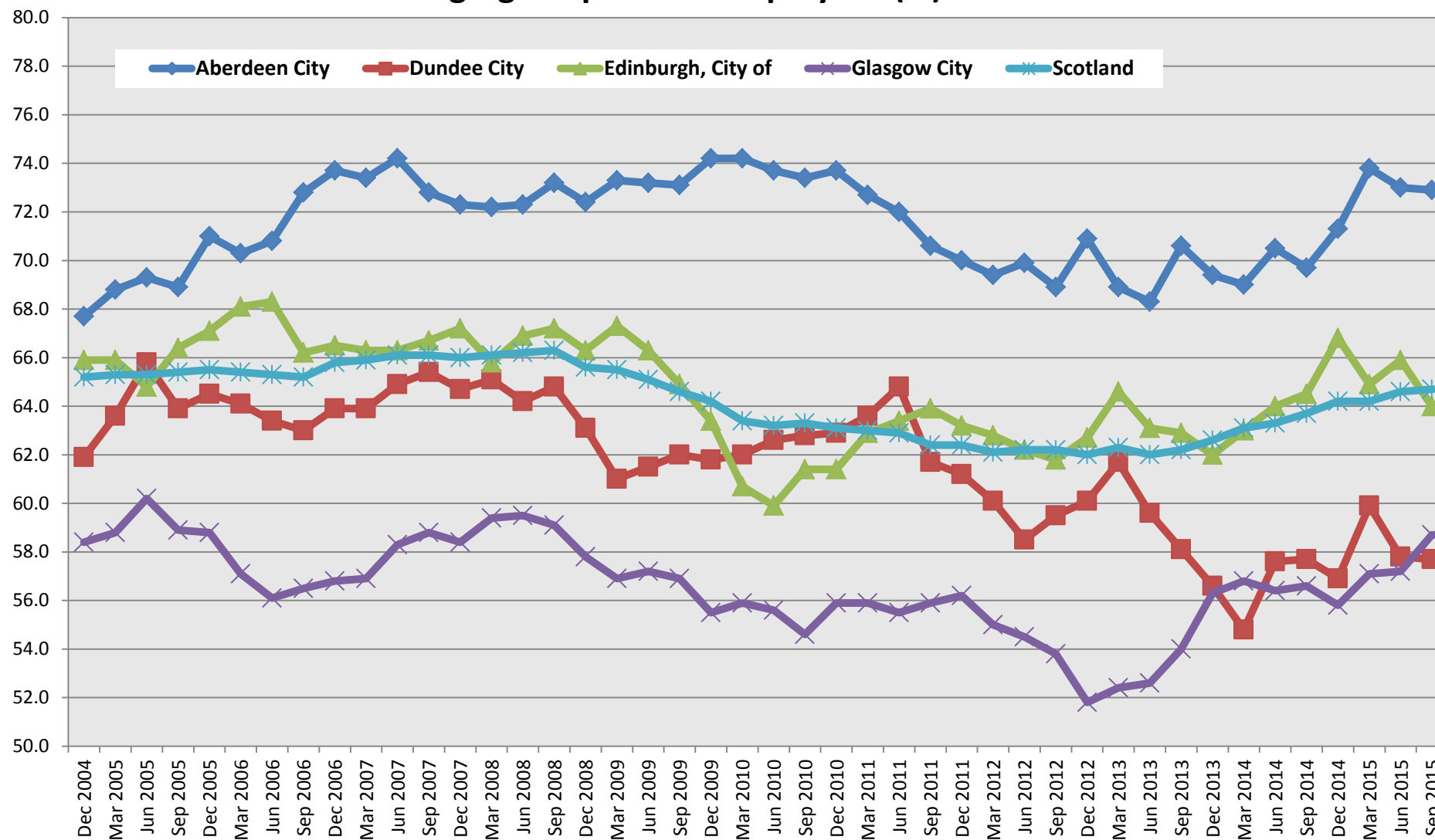
- By September 2015, Dundee City had the lowest employment rate of any Scottish Local Authority area, at 63.3 per cent.

Labour Market Strength - Dundee City 2005-2015



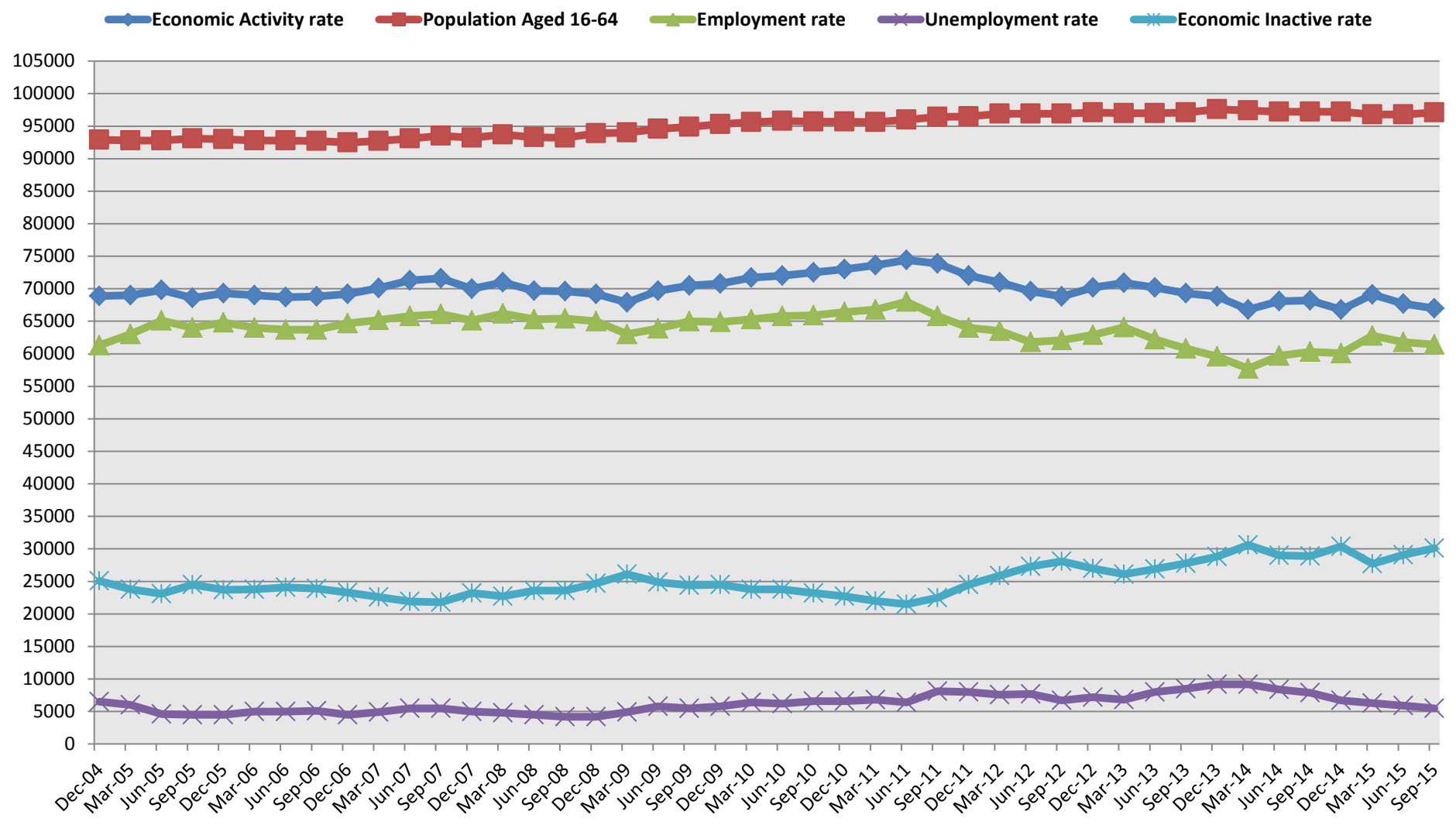
- The strength of the Dundee Labour Market has displayed modest recovery from 2014, after a period of decline from 2010.

Resident Working Age Population Employees (%) - Scotland 2004-2015



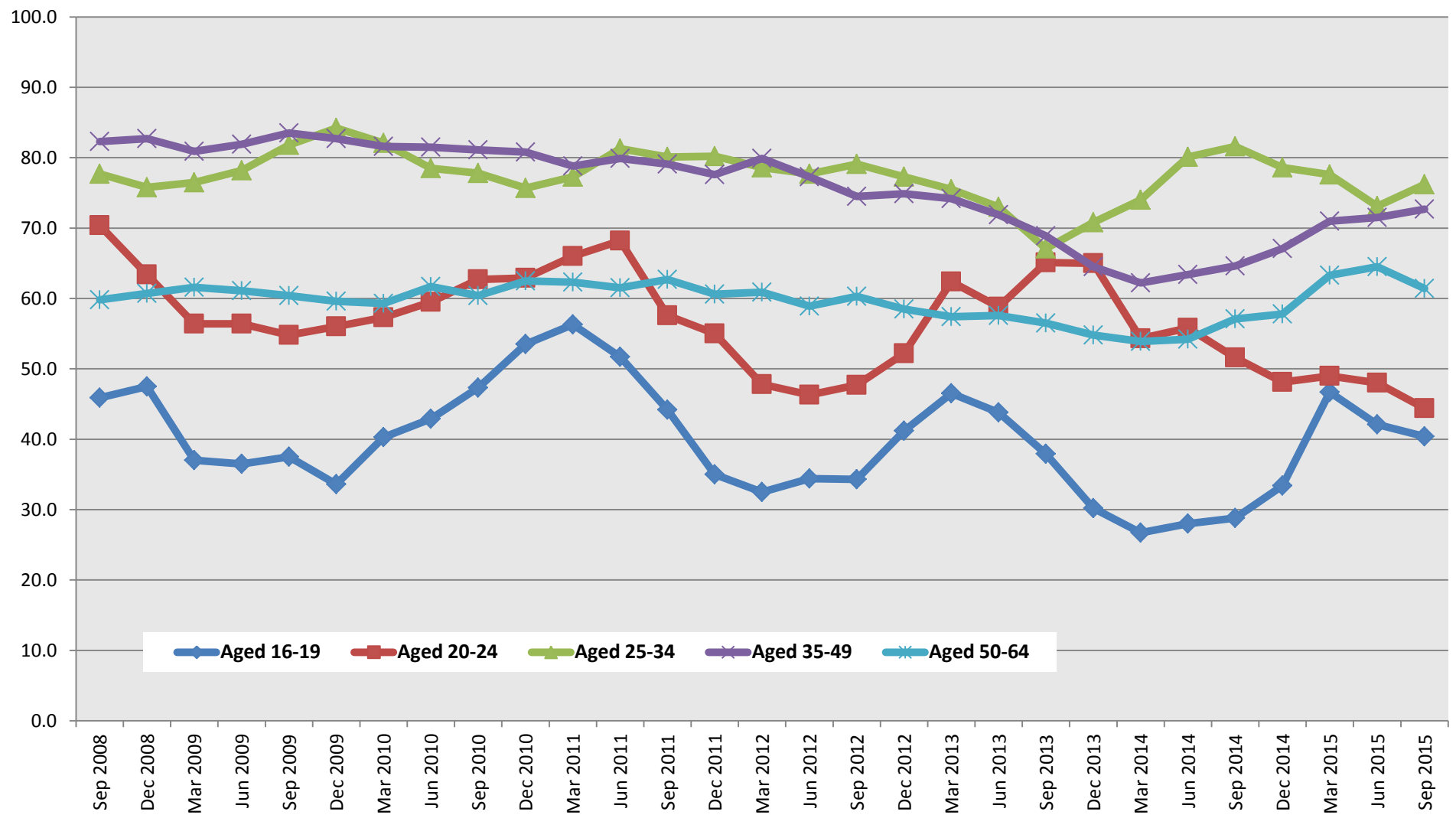
Source: ONS Annual Population Survey

Logintudinal Labour Market Performance - Dundee City 2004-2015



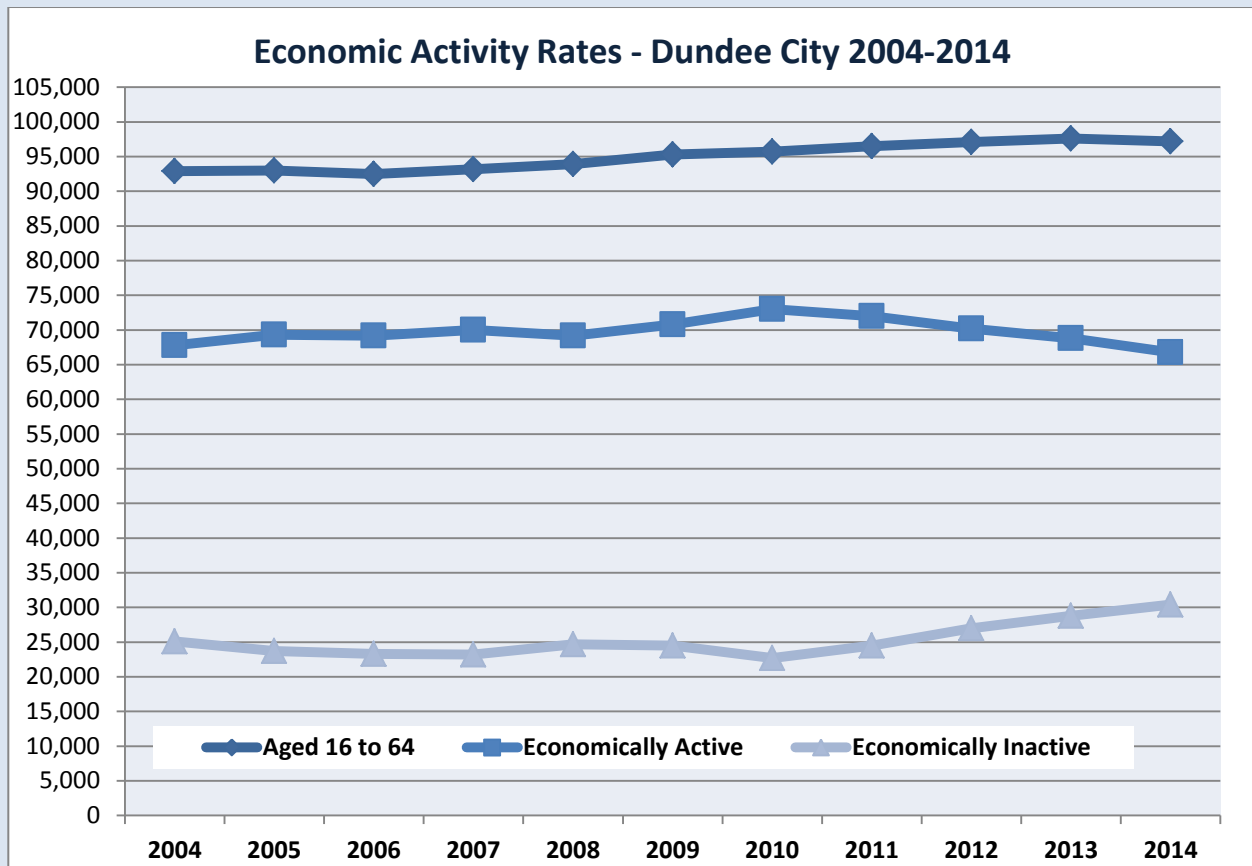
Source: ONS Annual Population Survey.

Employment Rates by Age Group: Dundee City - 2008-2015

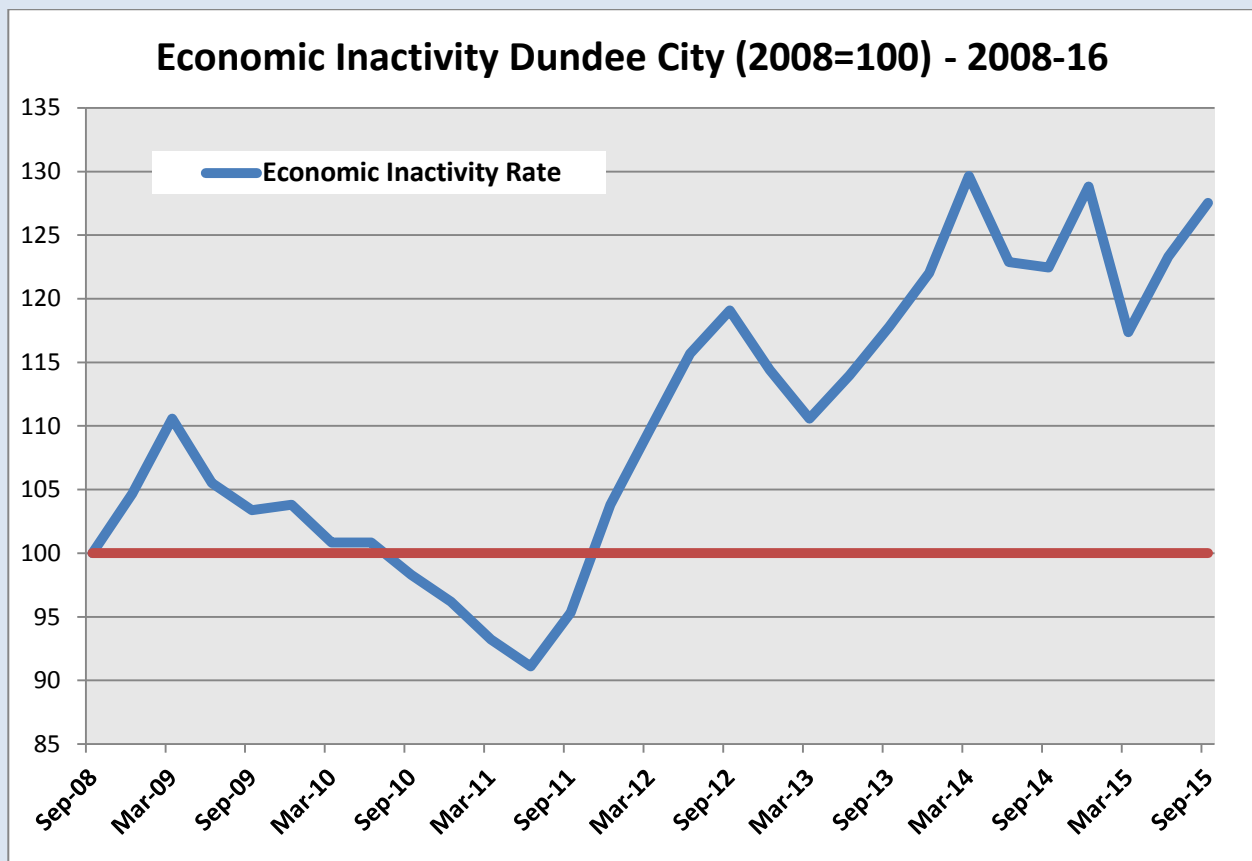


Source: ONS Annual Population Survey.

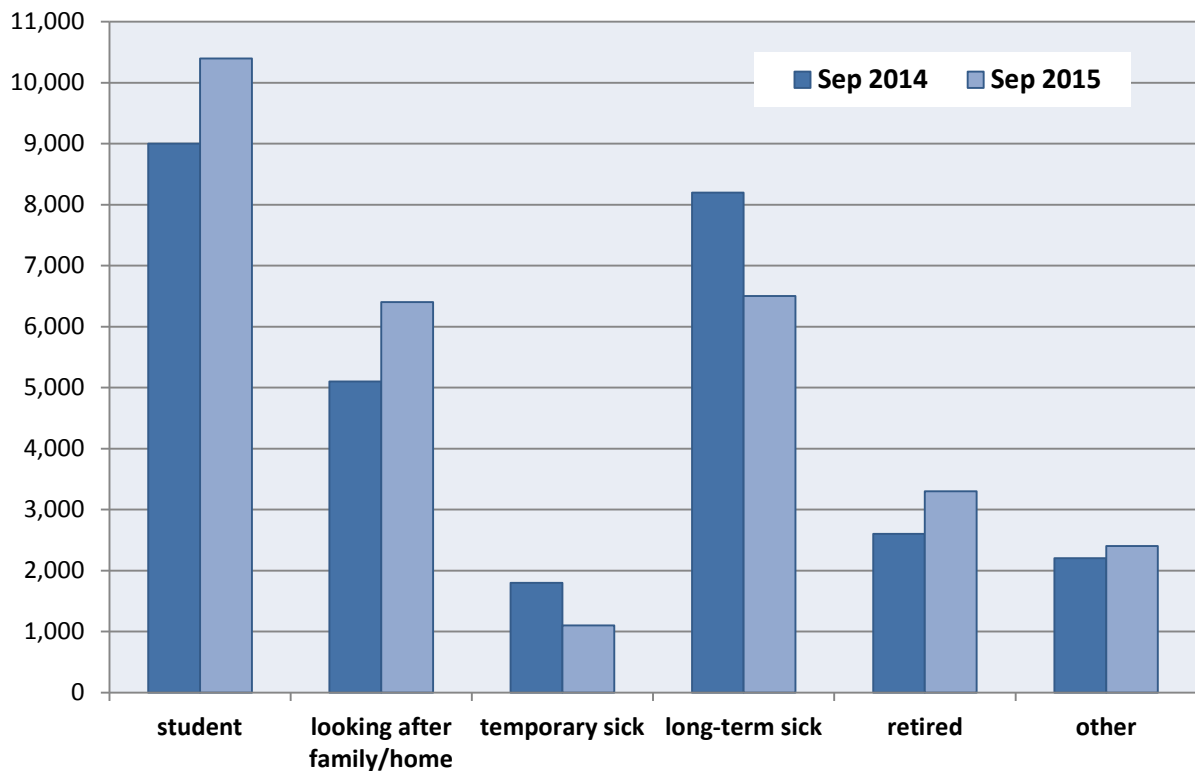
Economic Activity



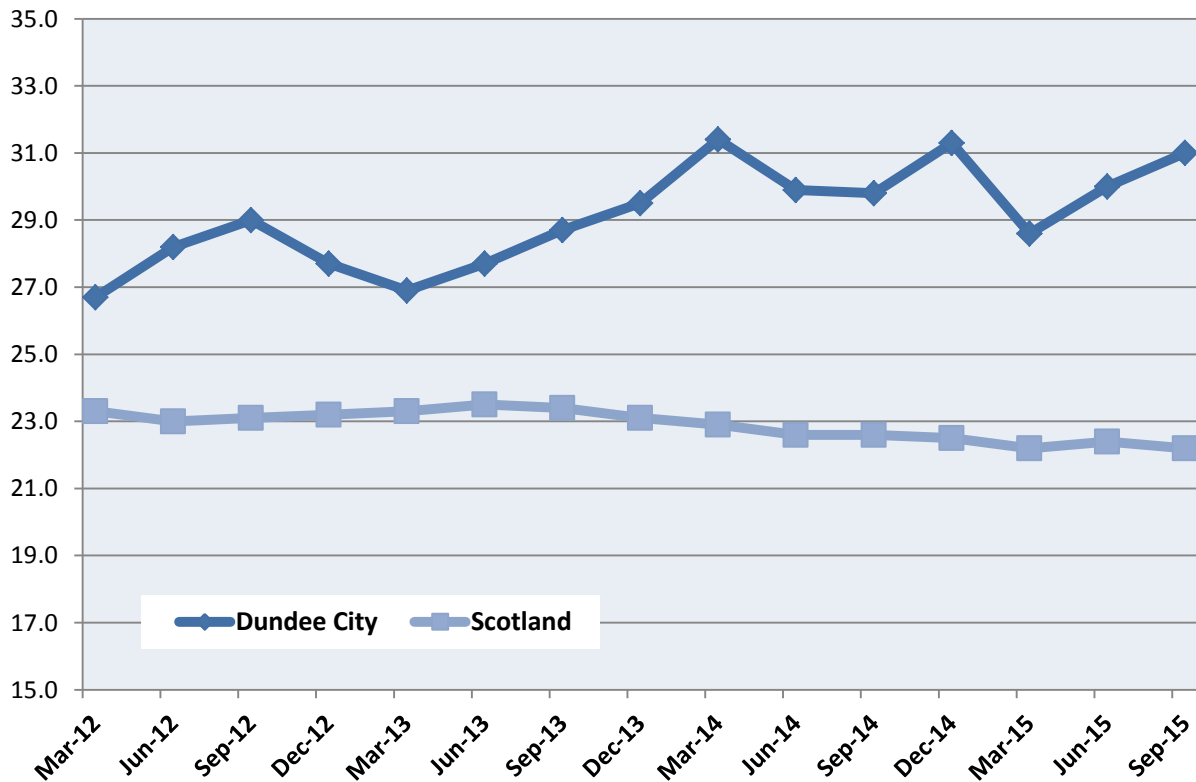
Source: ONS Annual Population Survey.



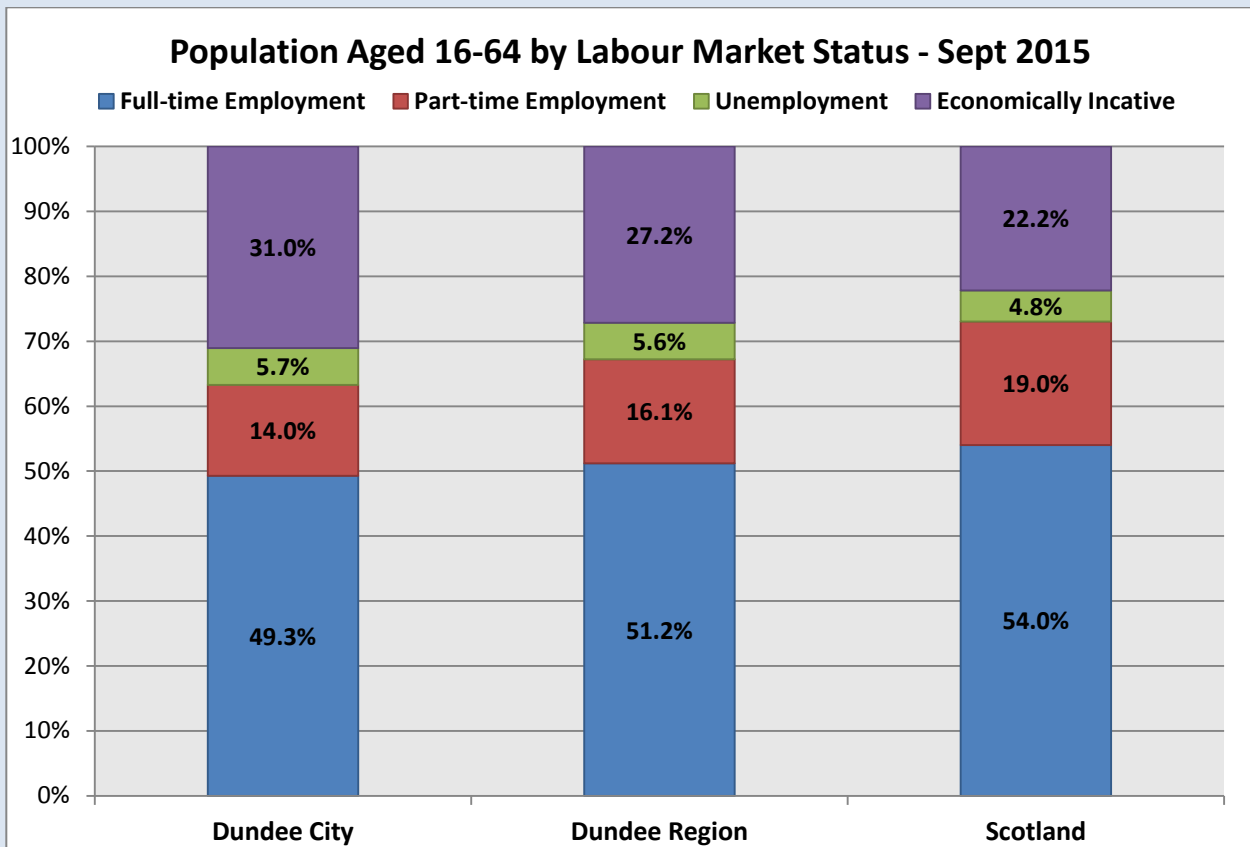
Economic Inactivity by Circumstance - Dundee City



Economically Inactive - Dundee & Scotland 2012-15



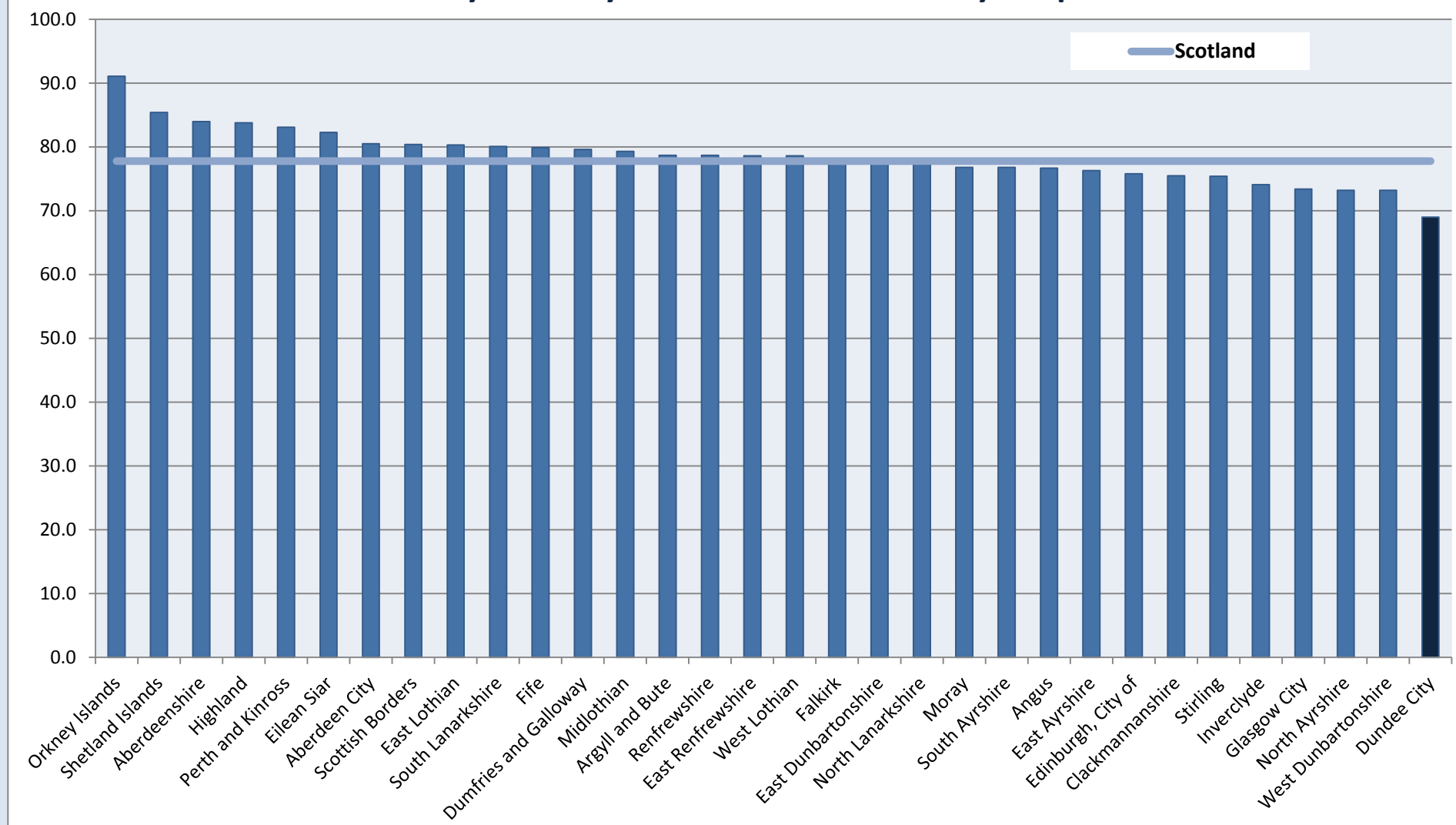
Source: ONS Annual Population Survey.



Source: ONS Annual Population Survey, September 2015

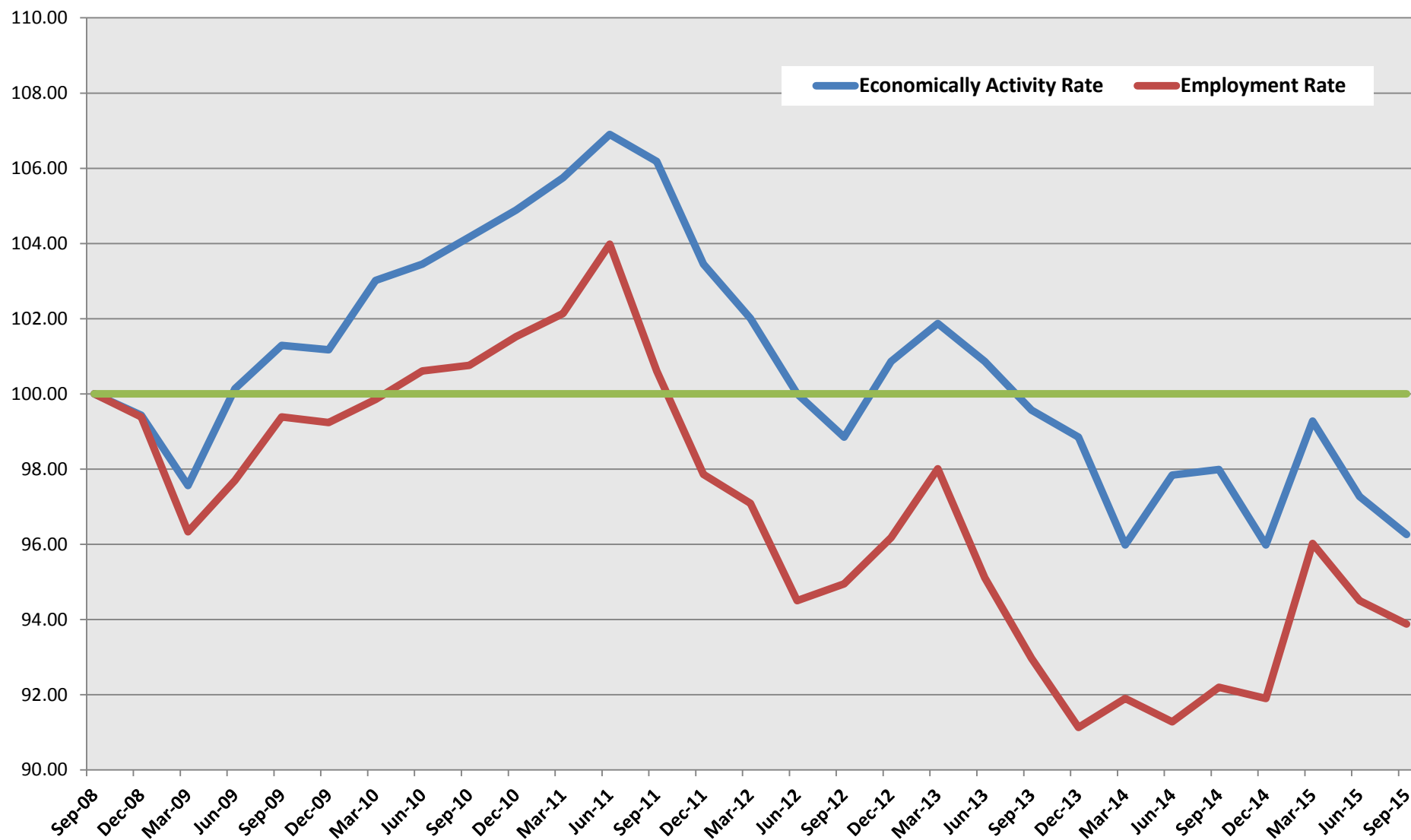
- In terms of proportions, Dundee City and the Dundee Region have lower employment and lower economic activity rates than the Scottish national average.
- 31.0 of the Dundee City working age population in September 2015 were classed as economically inactive.
- Dundee City had the lowest Economic Activity Rate of any Scottish Local Authority area in September 2015, at 69.0 of the working population either employed or actively seeking work, compared to the Scottish national average of 77.8 per cent.
- This is in part due to demographics; Dundee accounts for 2.8 per cent of the Scottish population but 8.5 per cent of Scotland's University Students attend university in Dundee. Dundee has approximately the same student population as Aberdeen but is a much smaller city.
- Dundee has one of the highest proportions of those designating as looking after families and long-term sick within the working age population of any Scottish local authority area. These groups are also classed as economically inactive.
- Taken together, Dundee City has one of the smallest potential and most vulnerable labour markets of any area in Scotland. The effect of this can distort employment figures in Dundee to look proportionally weaker than they are in comparison to other areas, which have different working age population compositions.

Economic Activity Rates by Scottish Local Authority - September 2015

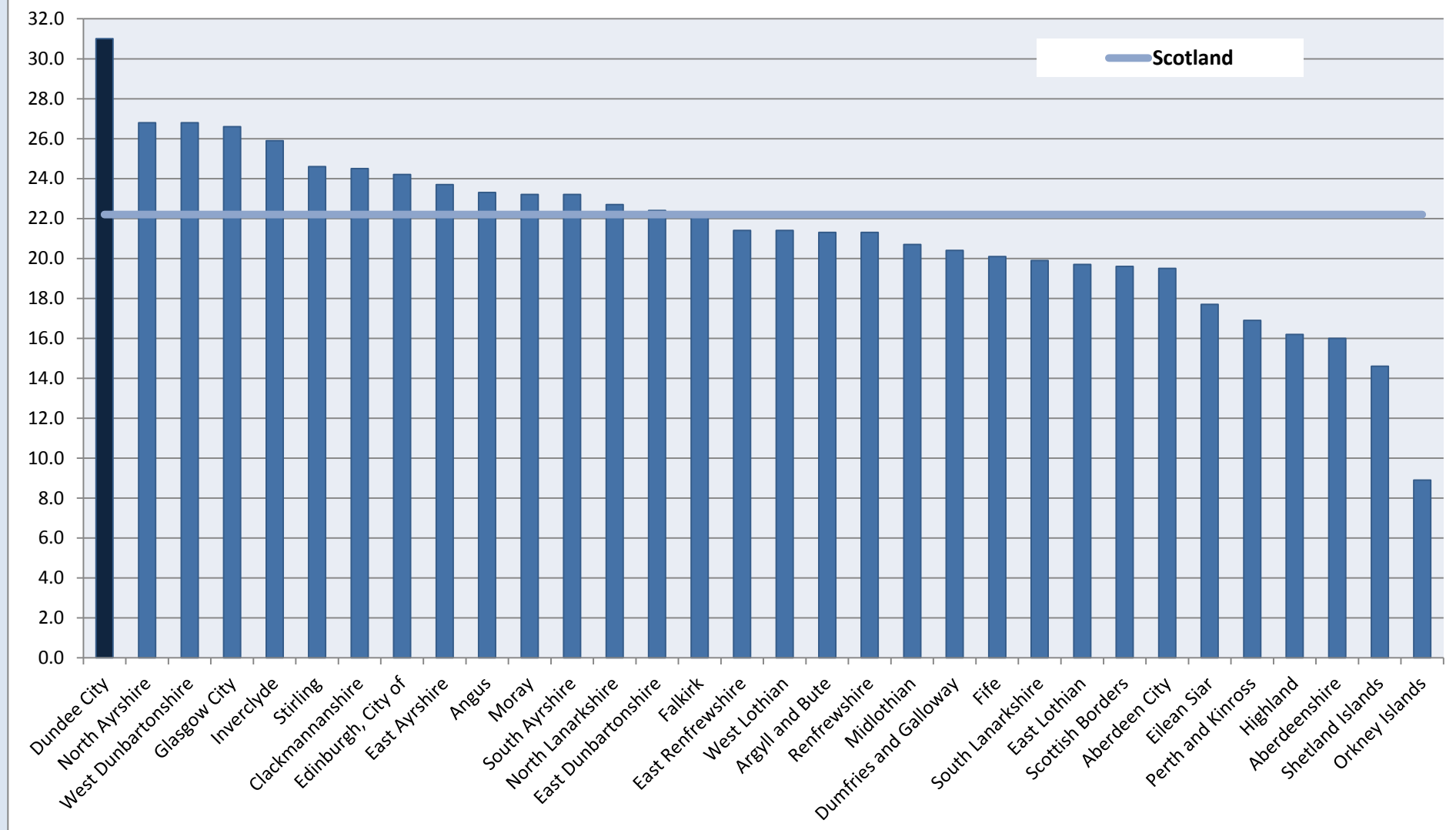


- By September 2015, Dundee had the lowest economically active working age population in all of Scotland, at 69.0 per cent.

Employment & Economic Activity (2008=100) - Dundee City 2008-15



Economic Inactivity Rates by Scottish Local Authority - September 2015



- Dundee has the highest economically inactive population of any Scottish Local Authority, at 31.0 per cent of the working age population.

Economically Inactivity by Reason – Dundee City September 2010-2015

	Sep-10	Sep-15	% change
inactive student	7,700	10,400	35.1%
inactive looking after family/home	3,400	6,400	88.2%
inactive temporary sick	600	1,100	83.3%
inactive long-term sick	6,200	6,500	4.8%
inactive discouraged	300	100	-66.7%
inactive retired	3,900	3,300	-15.4%
inactive other	1,100	2,300	109.1%
Total	23,200	30,100	29.7%

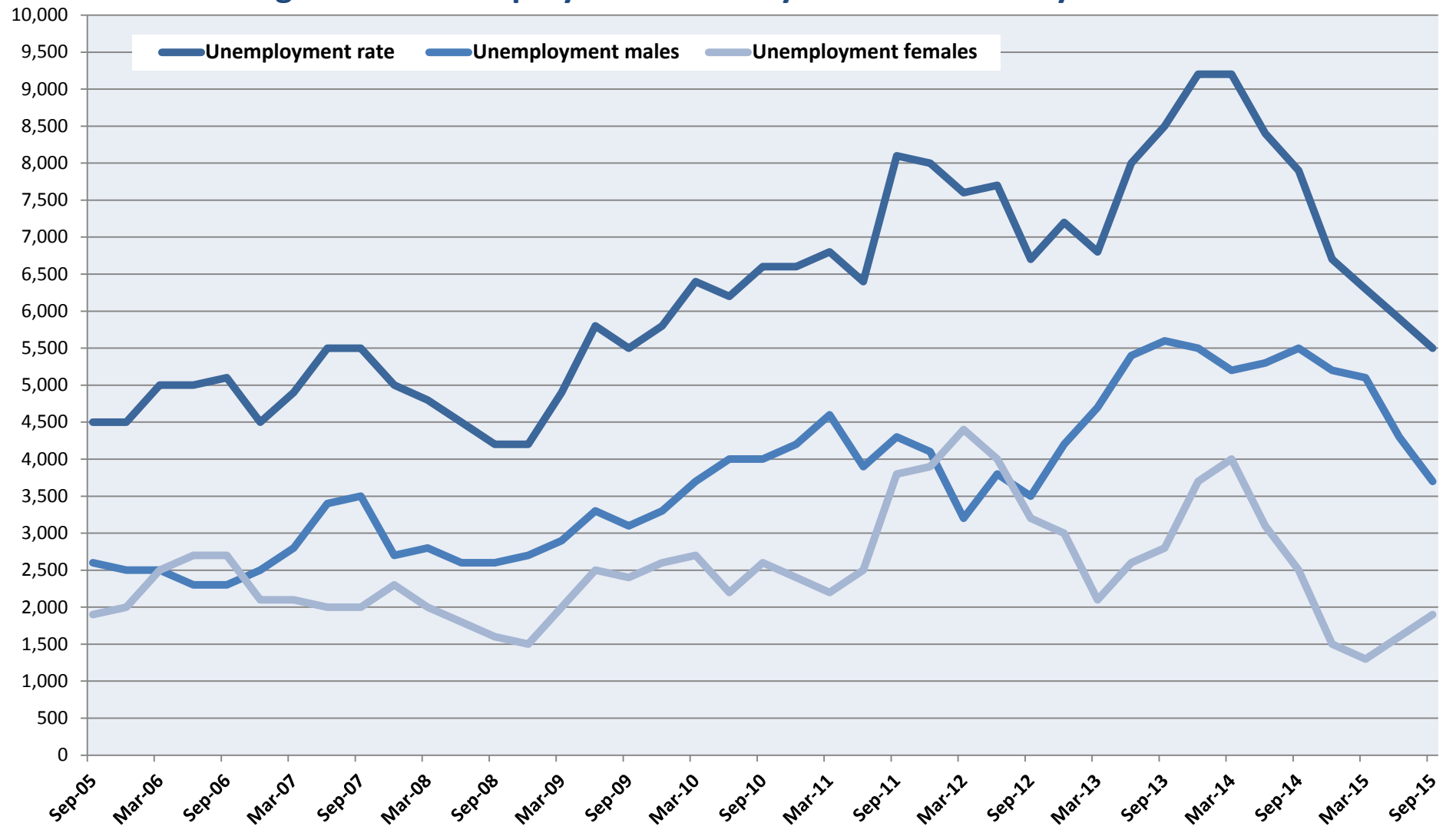
Source: ONS Annual Population Survey.

- Between 2010 and 2015, the number of economically inactive students in Dundee increase by 35 per cent, from approximately 7,700 to more than 10,400. Economically inactive students represent approximately 10.5 per cent of the Dundee City working age population.
- Between 2010 and 2015, the number of economically inactive residents of Dundee City looking after family or home increased by 3,000 and approximately 980 per cent.
- Between 2010 and 2015, there was an approximate increase of 30 per cent in the numbers of Dundee City residence classed as economically inactive.

Unemployment

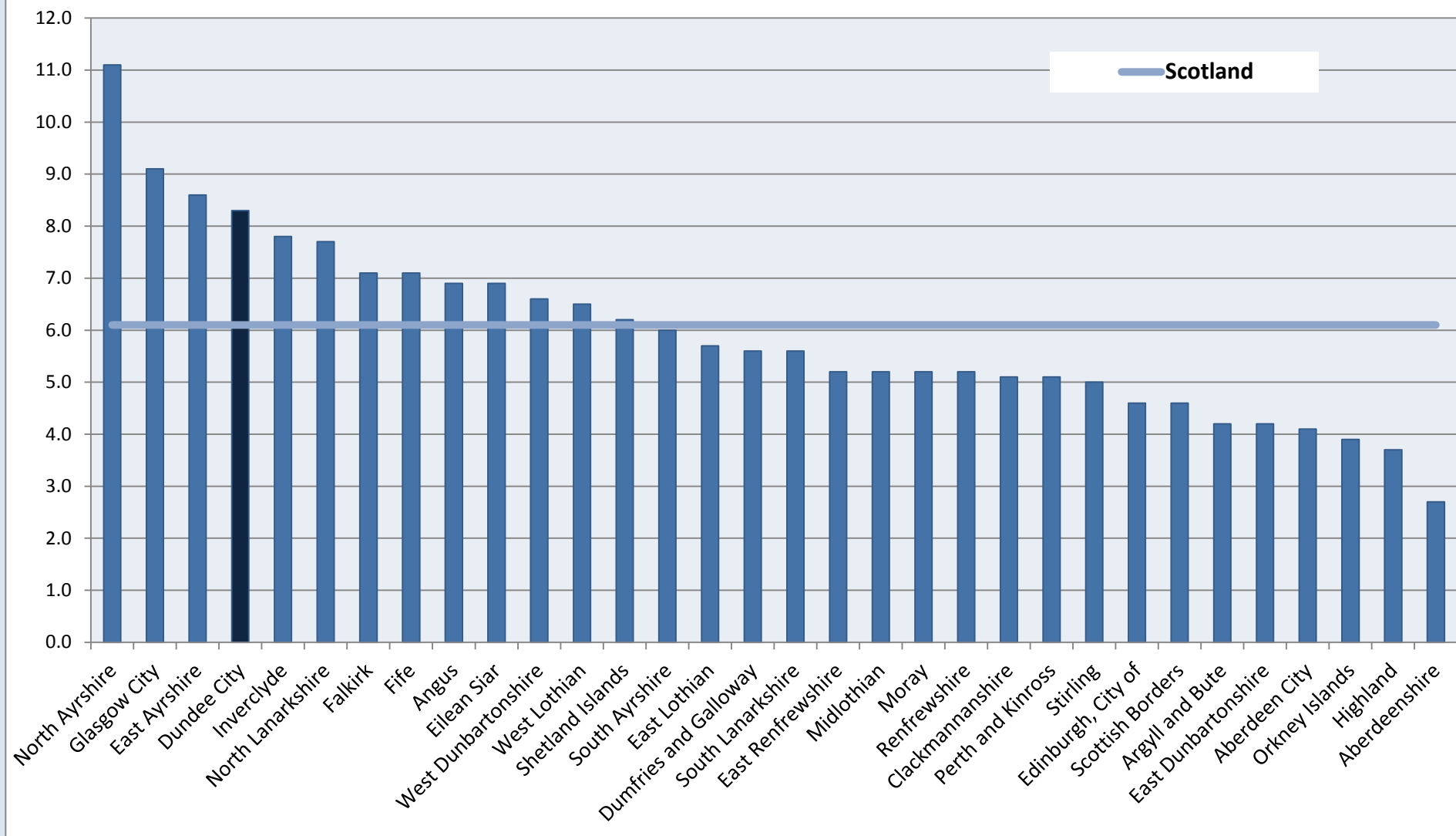
- In September 2015, approximately 5,500 people in Dundee City were unemployed. The number of those unemployed and actively seeking working within Dundee City had returned to the approximate pre-recession rate by 2015.
- Dundee City had one of the fastest declining unemployment rates of any area in Scotland; by September 2015, the unemployment rate reached 8.3 per cent. Despite this, Dundee City had the 4th highest unemployment rate of any Scottish Local Authority by September 2015. This is in part due to the elastic nature of unemployment in areas of lower economic performance.
- The unemployment rate for Dundee City reached a historic high in March 2014, with approximately 9,200 people and 13.8 per cent of the population aged 16-64 being unemployed. At this time, Dundee had the highest level of unemployment in all of Scotland, with headline unemployment more than twice the pre-recession rate by March 2014.
- Within a time period in which both unemployment rates and Jobseekers allowance claimant rates evidenced marked decline, the number of working age people in Dundee City registered as economically inactive drastically increased.
- It is likely that the real number of people in Dundee City that are unemployed, but do not meet the ILO unemployment definition criteria, is substantially higher than the official rate as this only estimates the visible level of unemployment. The true level of unemployment or underutilised potential labour is likely substantially higher. Given local labour market circumstances and Dundee's disproportionately high levels of economic inactivity, actual unemployment is very likely higher than the headline figure.
- Long-term unemployment has been historically higher in Dundee City than the Scottish national average. Between August 2012-13, the number of long-term JSA claimants in Dundee City was approximately 2.0 per cent of the working age population, with the comparable Scottish national average at approximately 1.1 per cent within the same period.

Longitudinal Unemployment Rates by Sex - Dundee City 2005-2015



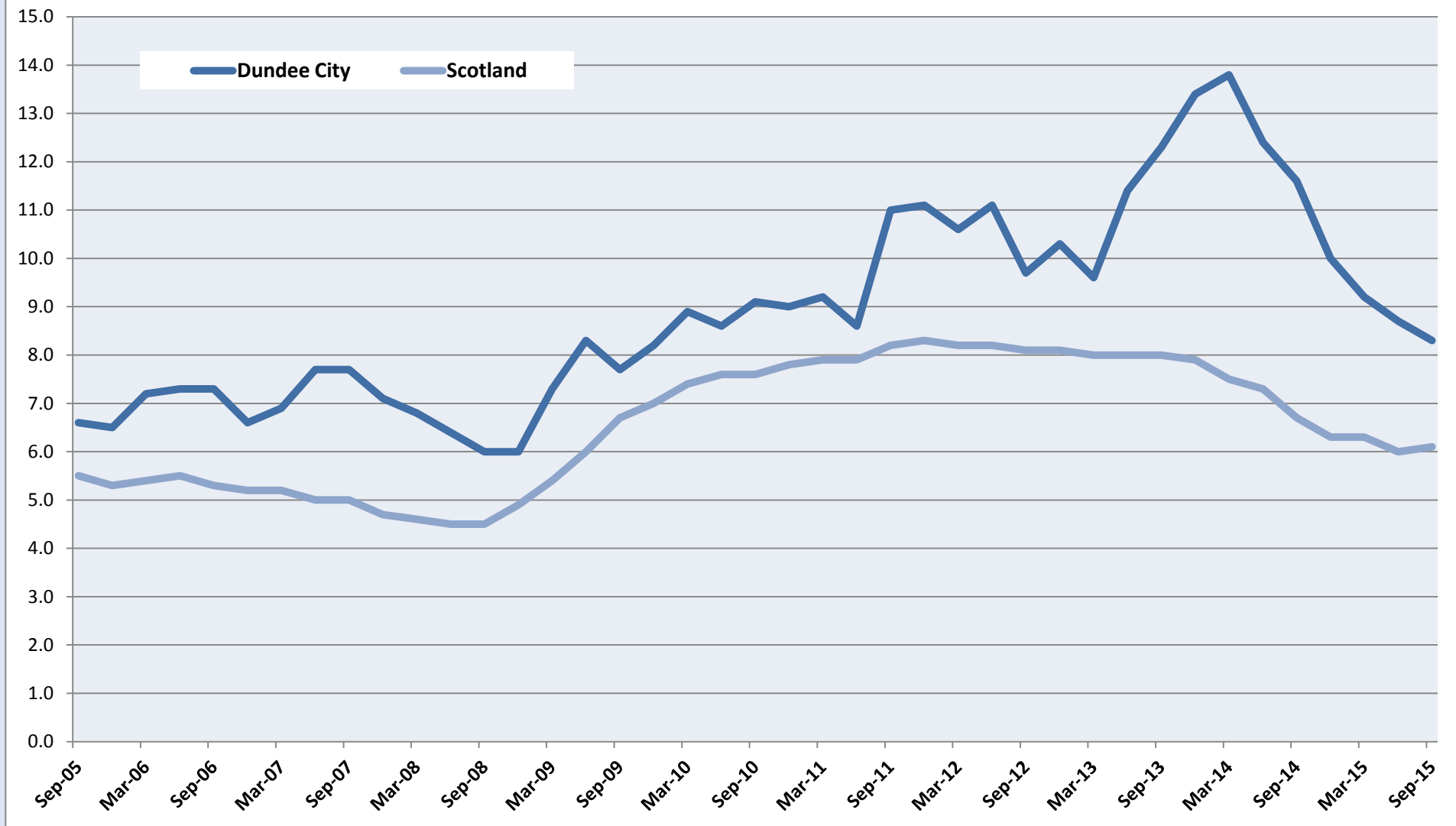
- Unemployment rates for Dundee City reached a historic high between December 2013 and March 2014, with 9,200 people unemployed.

Unemployment Rates by Scottish Local Authority - September 2015



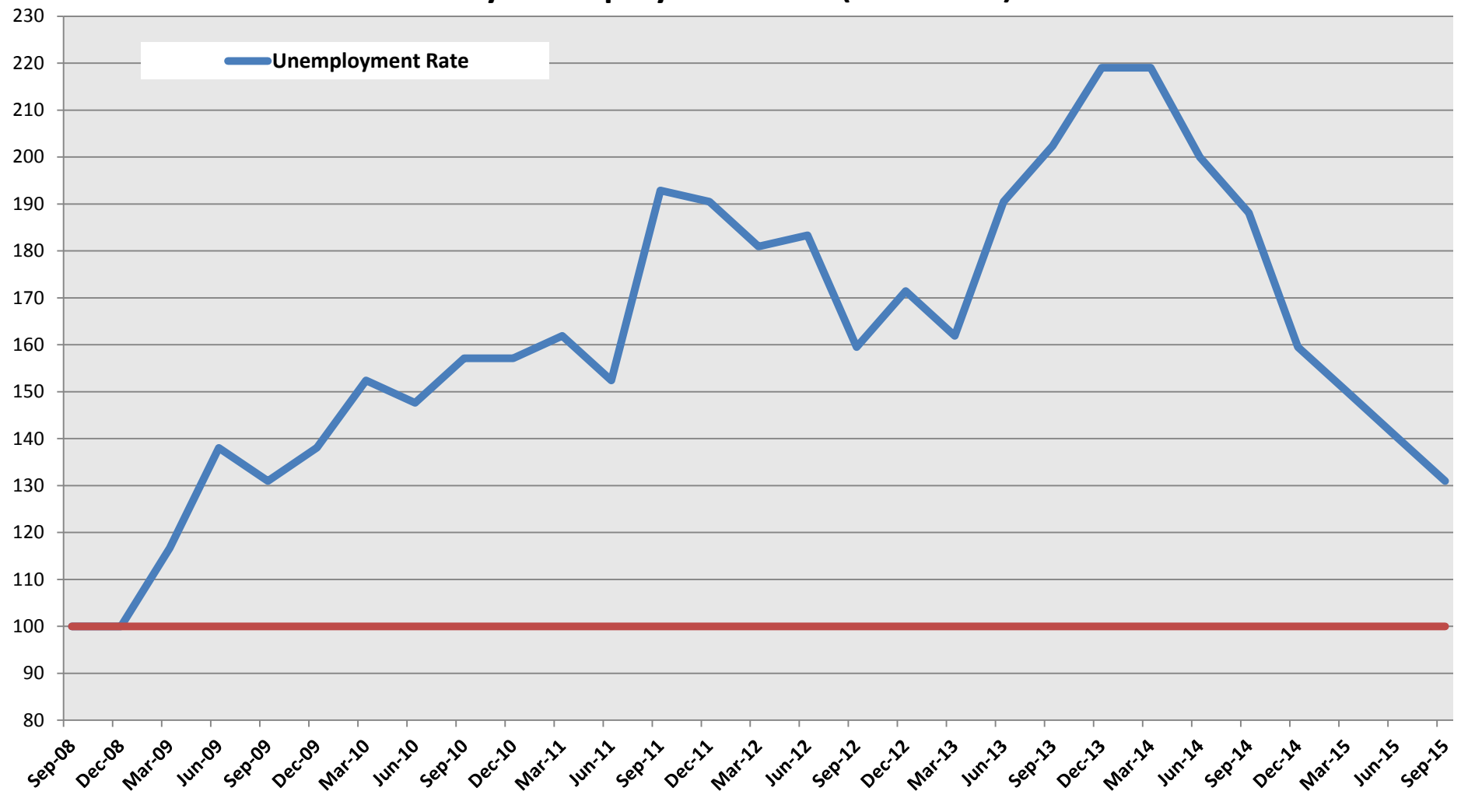
- In September 2015, Dundee City had the fourth highest unemployment rate of all Scottish Local Authority areas (8.3 per cent).

Longitudinal Unemployment Rates - Dundee City & Scotland 2005-2015



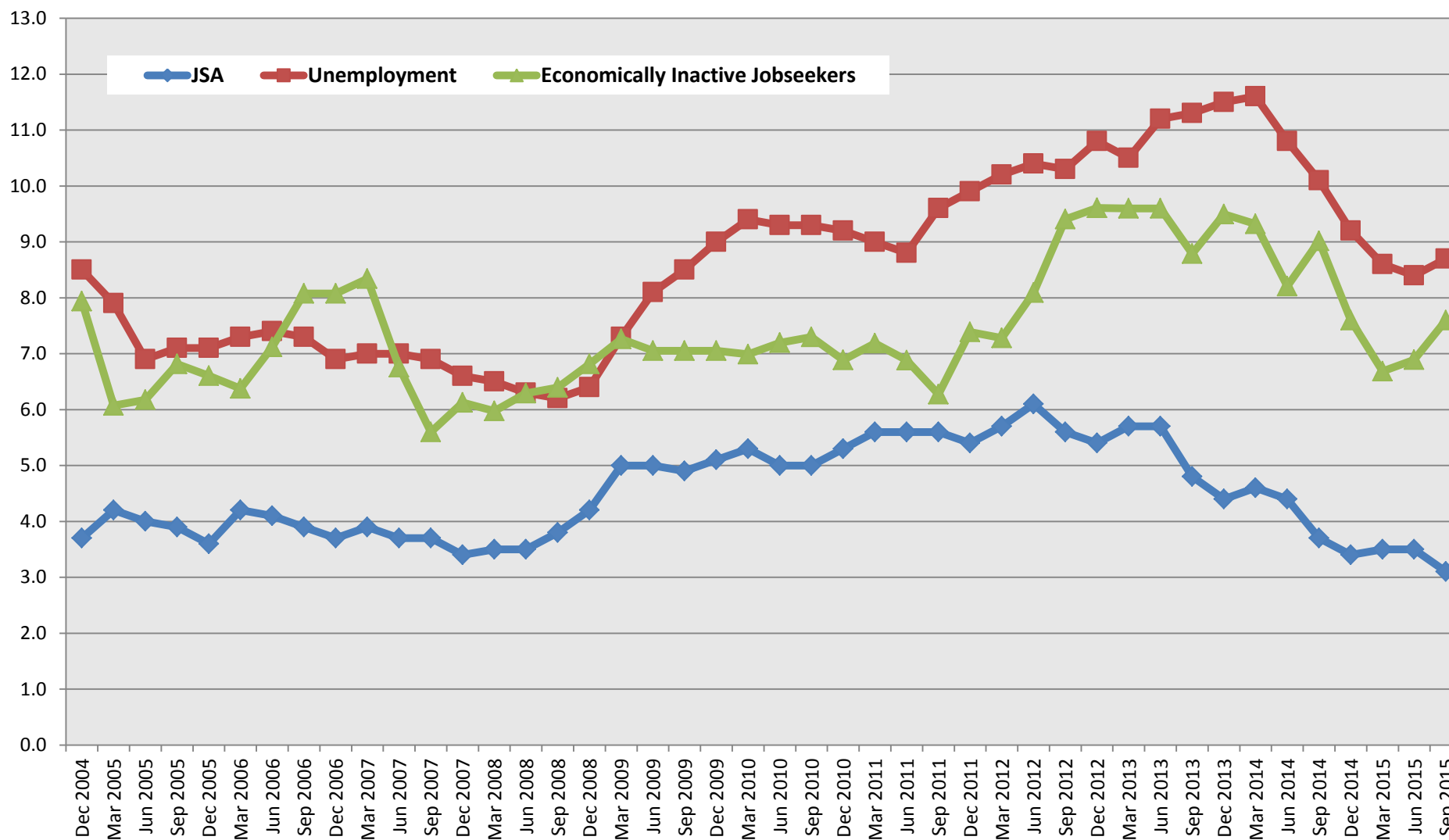
- Between December 2013 and September 2015, the unemployment rate for Dundee City declined from 13.8 per cent to 8.3 per cent.

Dundee City Unemployment Rate (2008=100) - 2008-15



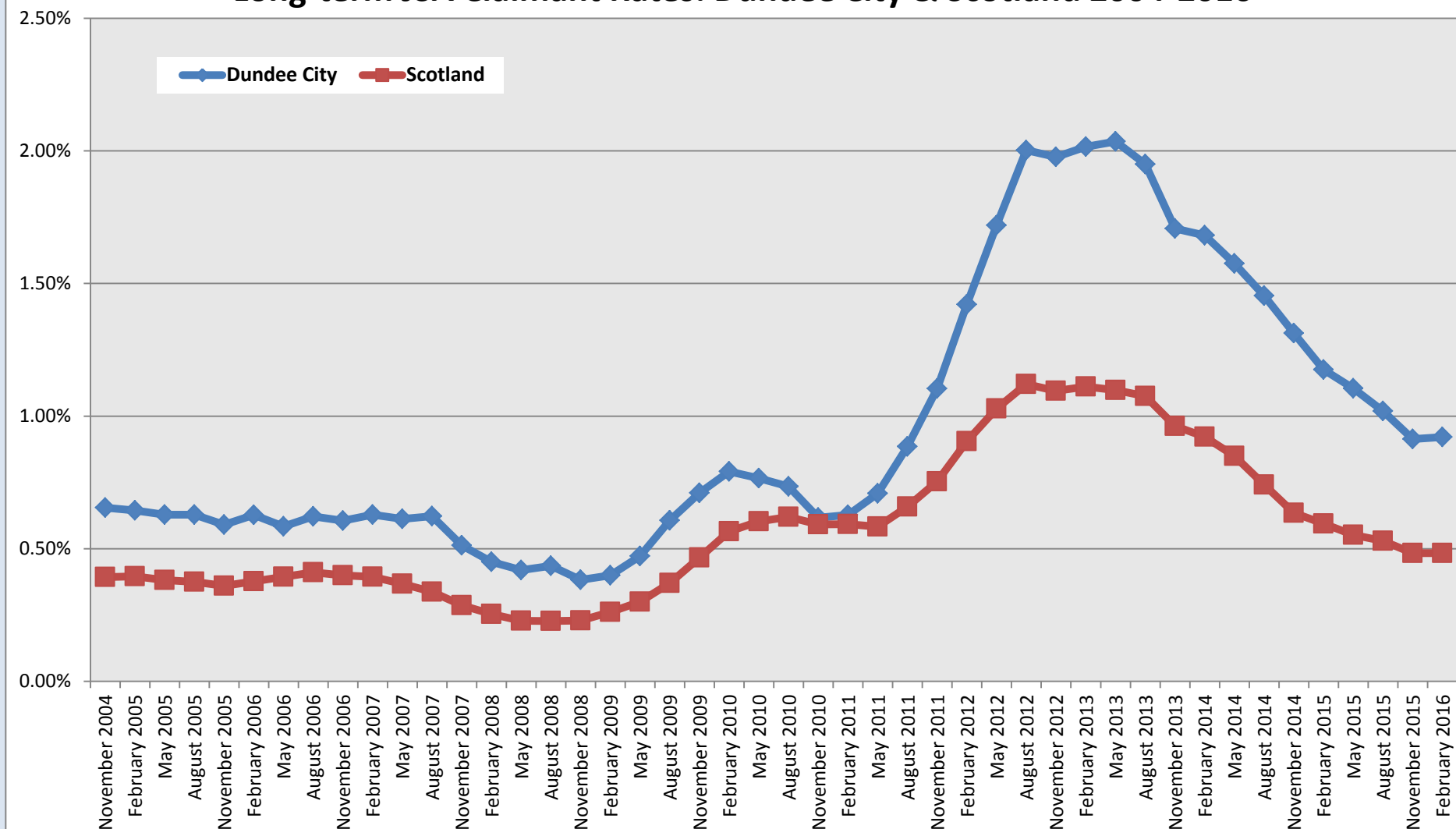
- By September 2015, the Dundee City unemployment rate was 21 per cent higher than the 2008 rate. The unemployment rate declined by 88 percentage points between March 2014 and September 2015.

JSA, Unemployment & Economically Inactive Jobseekers - Dundee 2004-15



Source: ONS Annual Population Survey; ONS Jobseekers Allowance.

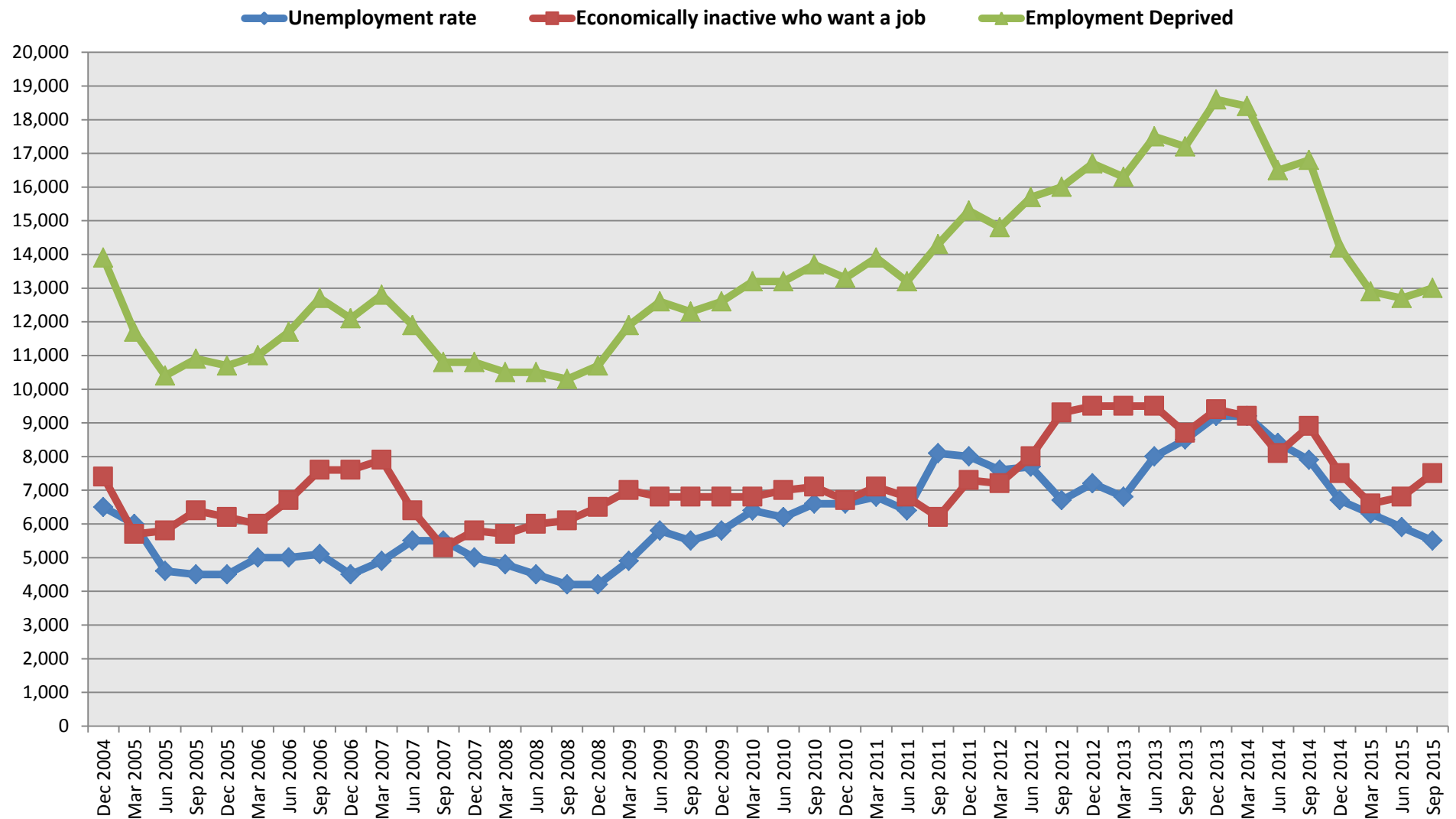
Long-term JSA Claimant Rates: Dundee City & Scotland 2004-2016



Source: ONS Jobseekers Allowance.

- In 2016, the number of working age people in Dundee City receiving Jobseekers Allowance for more than 12 months was 0.92 per cent.

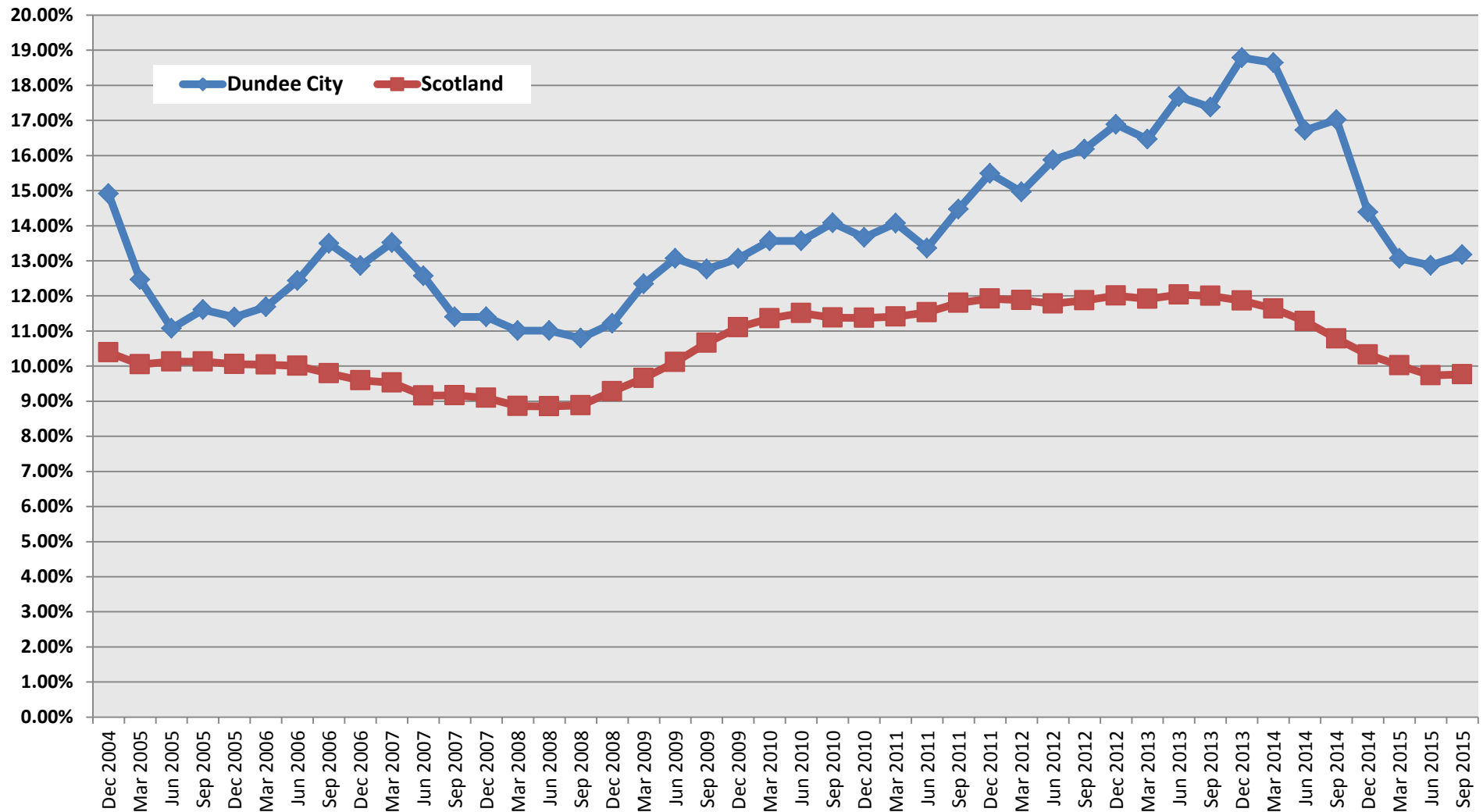
Employment Deprivation - Dundee City 2004-2015



**Employment Deprivation calculated using unemployment rate (economically active) plus economically inactive who would like a job.*

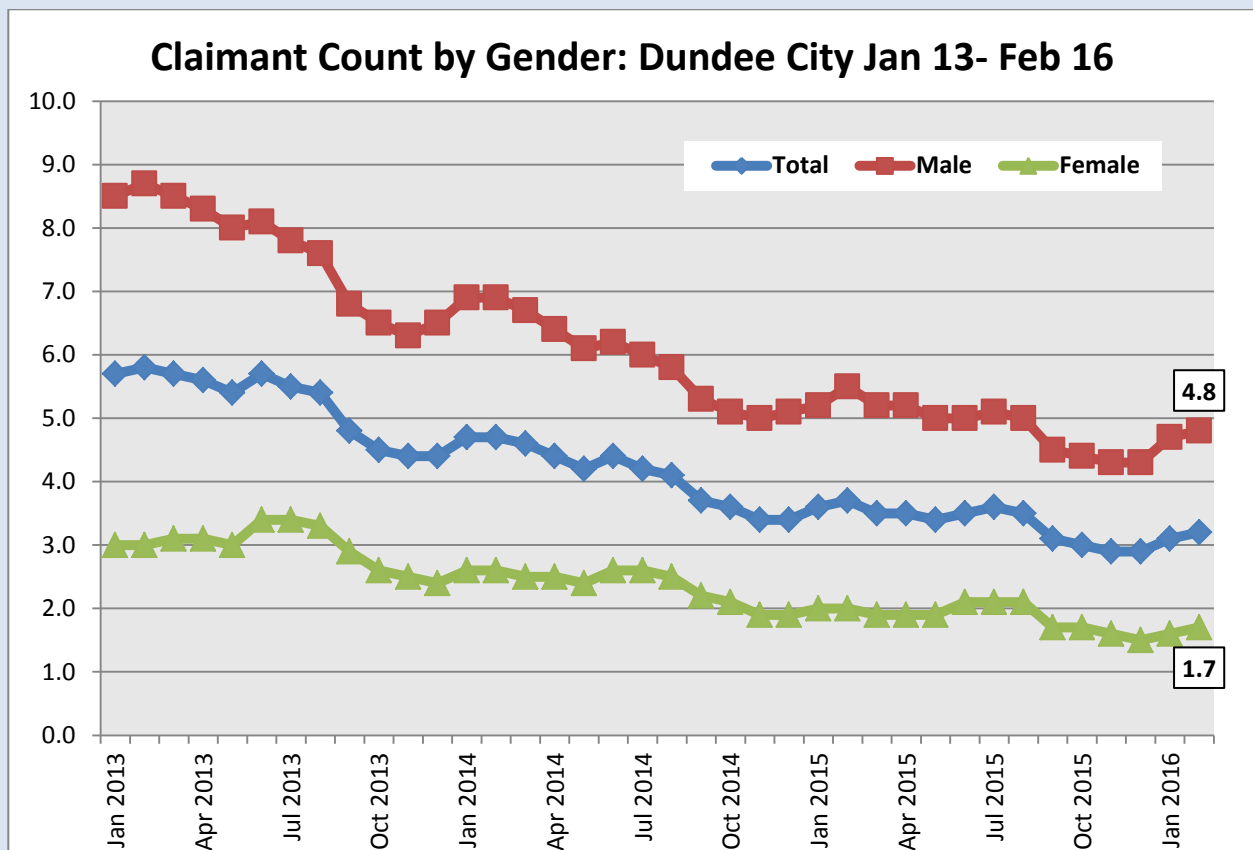
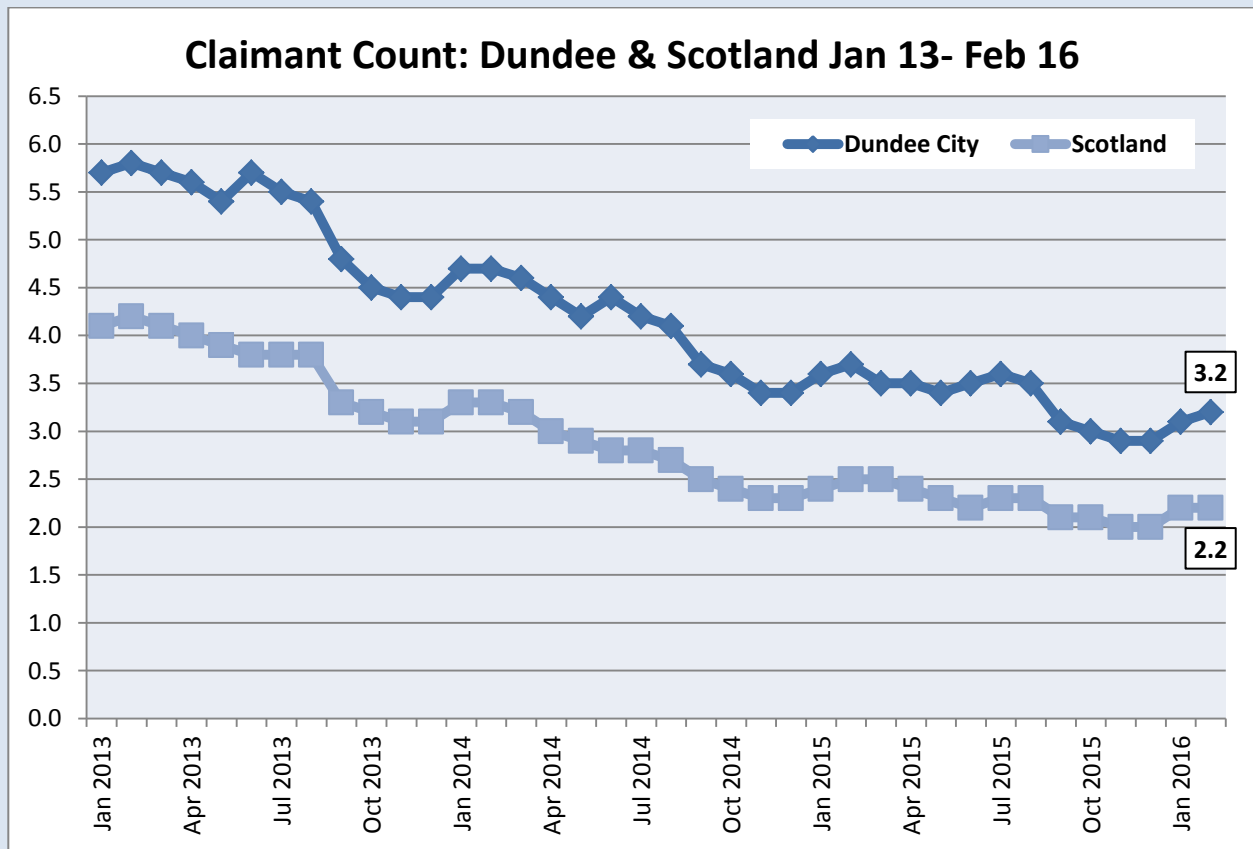
Employment Deprivation - Dundee City & Scotland 2004-2015

(ILO Unemployment & Economically Inactive Wanting Employment - Working Population Percentage)



Source: ONS Annual Population Survey.

Out of Work Benefits



Source: ONS Claimant Count.

Claimants of Jobseekers Allowance January 2015 – January 2016

	Males	Rate	Females	Rate	Total	Rate
January 2015						
Dundee City	2,522	5.2	1,009	2.0	3,531	3.6
Scotland	58,582	3.4	25,722	1.5	84,304	2.4
January 2016						
Dundee City	2,097	4.4	766	1.5	2,863	2.9
Scotland	42,946	2.5	19,969	1.1	62,915	1.8

Source: ONS Jobseeker's Allowance with rates and proportions, January 2016

Long-term Claimants of Jobseekers Allowance January 2015 – January 2016

	Males	Rate	Females	Rate	Total	Rate
January 2015						
Dundee City	955	2.0	340	0.6	1,335	1.3
Scotland	16,550	1.0	6,885	0.4	23,440	0.7
January 2016						
Dundee City	785	1.6	260	0.5	1,055	1.0
Scotland	13,180	0.8	5,320	0.3	18,500	0.5

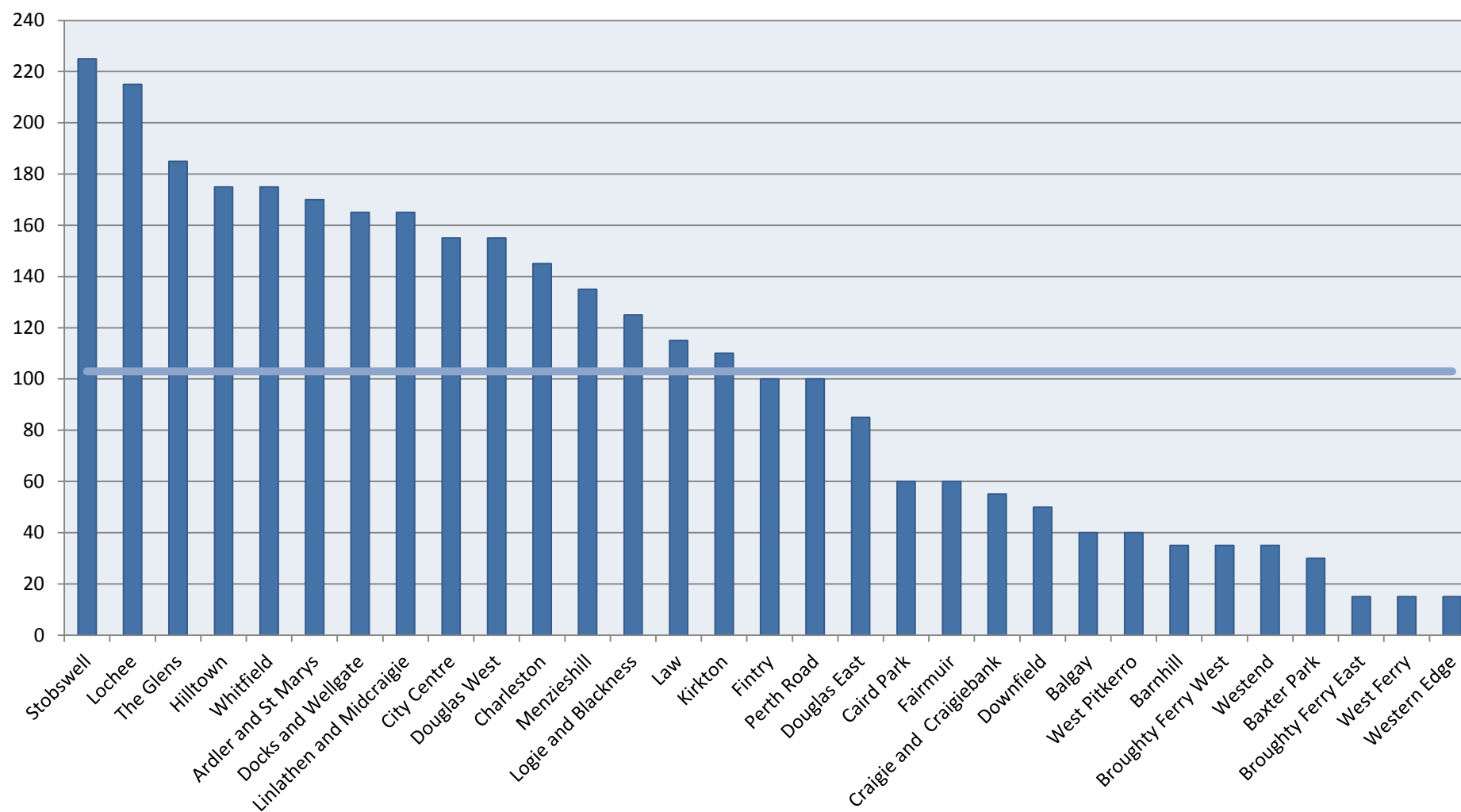
Source: ONS JSA Claimant Count. Data rounded to nearest 5 (disclosure control). *Long-term classification of a period exceeding 12 months (25 and over) and exceeding 6 months (24 and under).

Youth Claimants of Jobseekers Allowance January 2015 – January 2016

	Males	Rate	Females	Rate	Total	Rate
January 2015						
Dundee City	560	4.9	250	2.0	810	3.4
Scotland	13,210	4.2	5,860	1.9	19,070	3.1
January 2016						
Dundee City	410	3.6	180	1.5	595	2.5
Scotland	7,250	2.3	3,360	1.1	10,610	1.7

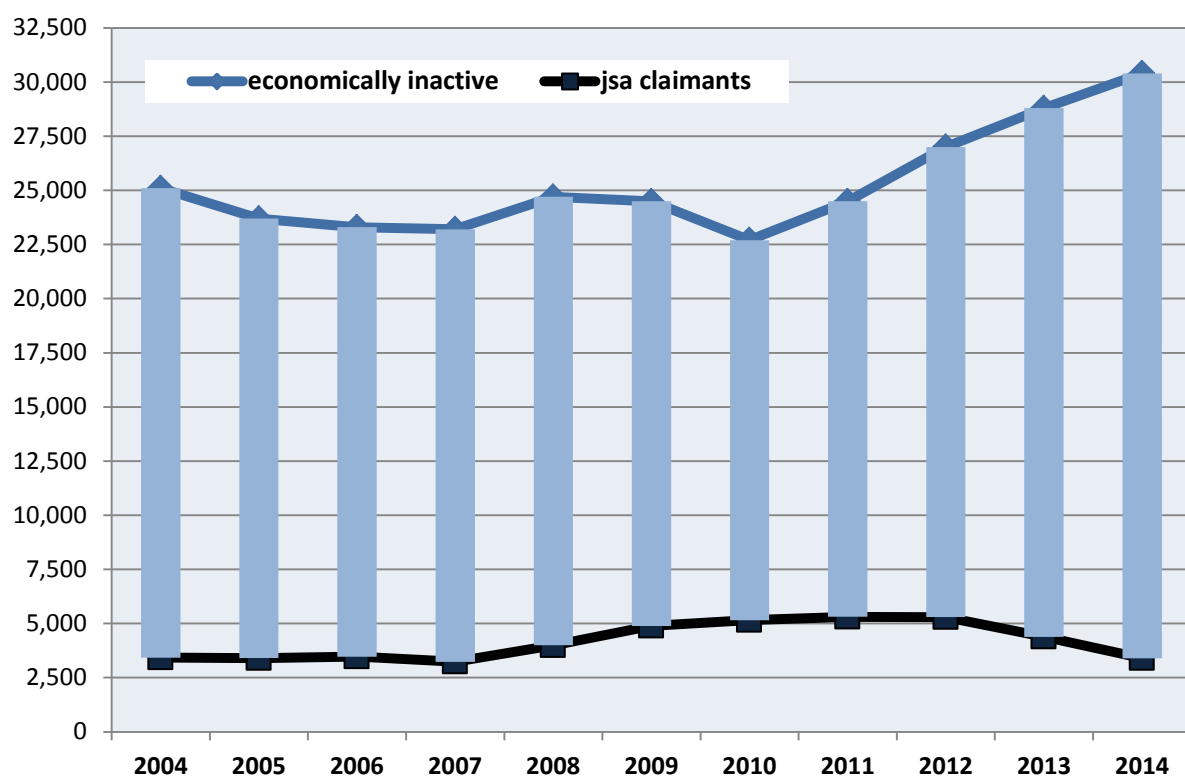
Source: ONS JSA Claimant Count. Data rounded to nearest 5 (disclosure control).

Claimant Count by 2011 Intermediate Zone: Dundee City - February 2016



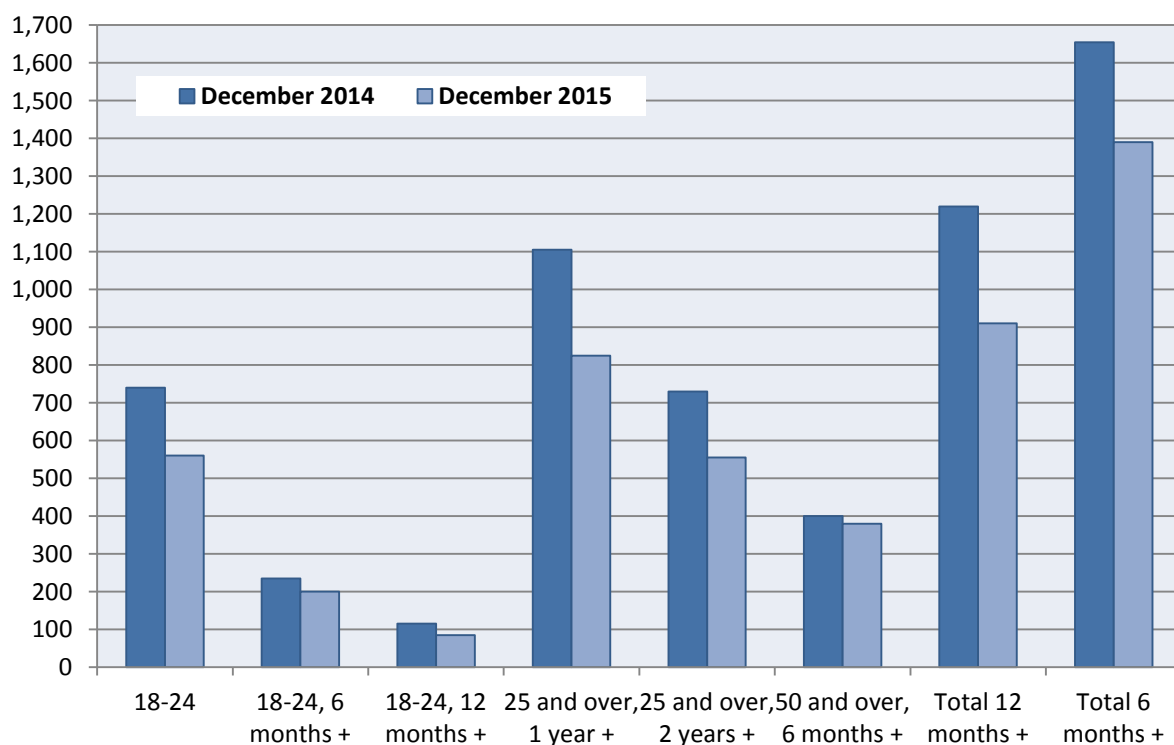
- The areas of Dundee with the largest numbers of Claimants (JSA/UC) in February 2016 were Stobswell (225), Lochee (215) and The Glens (185).

Economic Inactivity & JSA Claimants - Dundee City 2004-14



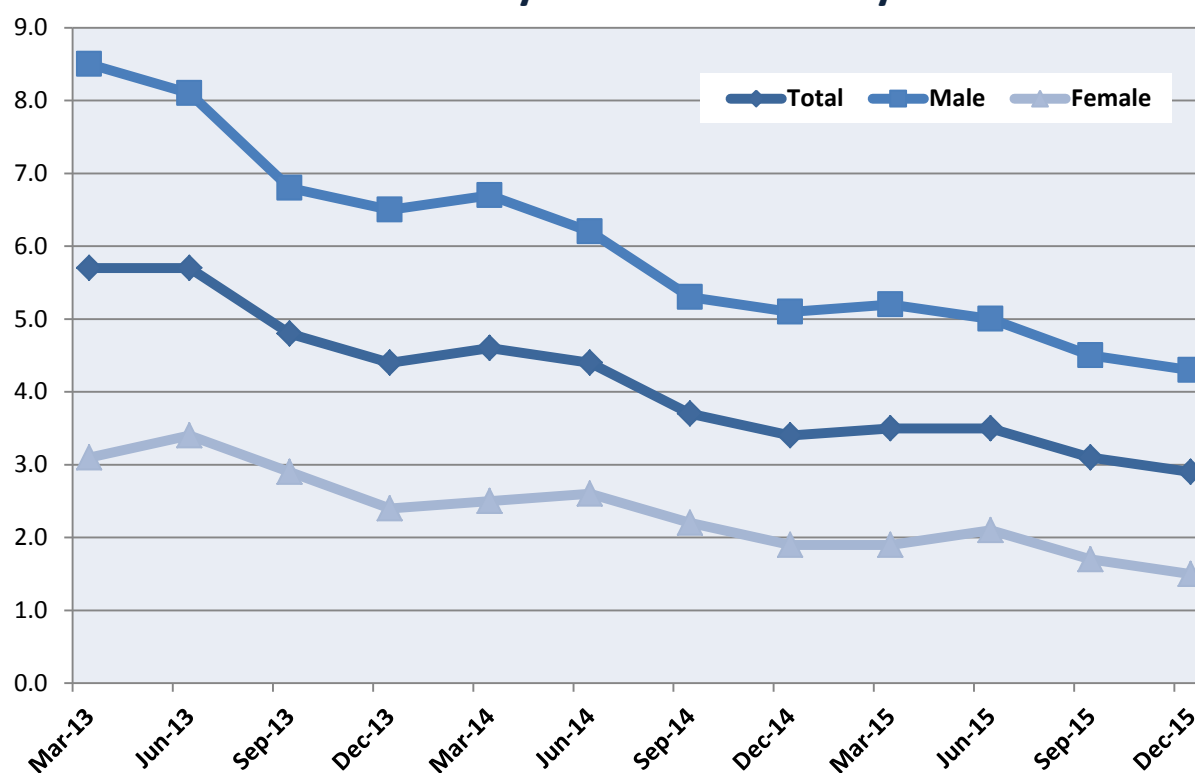
Source: ONS Annual Population Survey.

JSA Claimants by Age & Duration - Dundee City



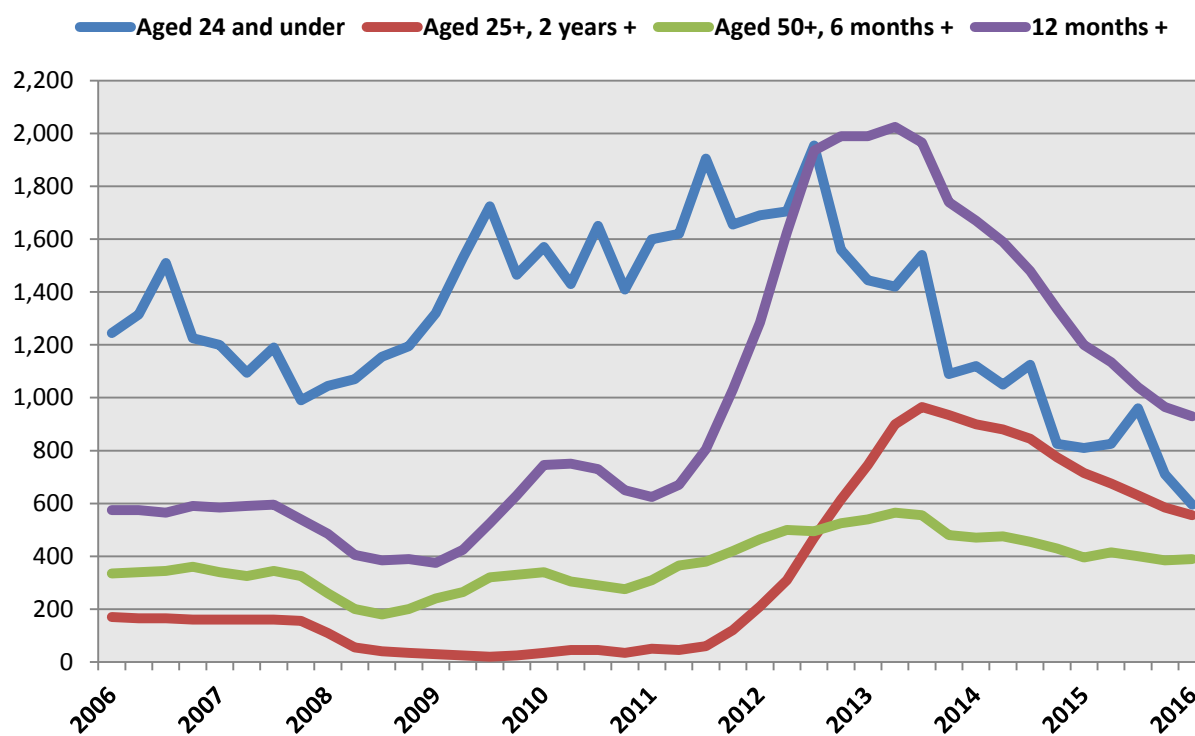
Source: ONS Jobseekers Allowance.

Claimant Count by Sex - Dundee City 2013-15



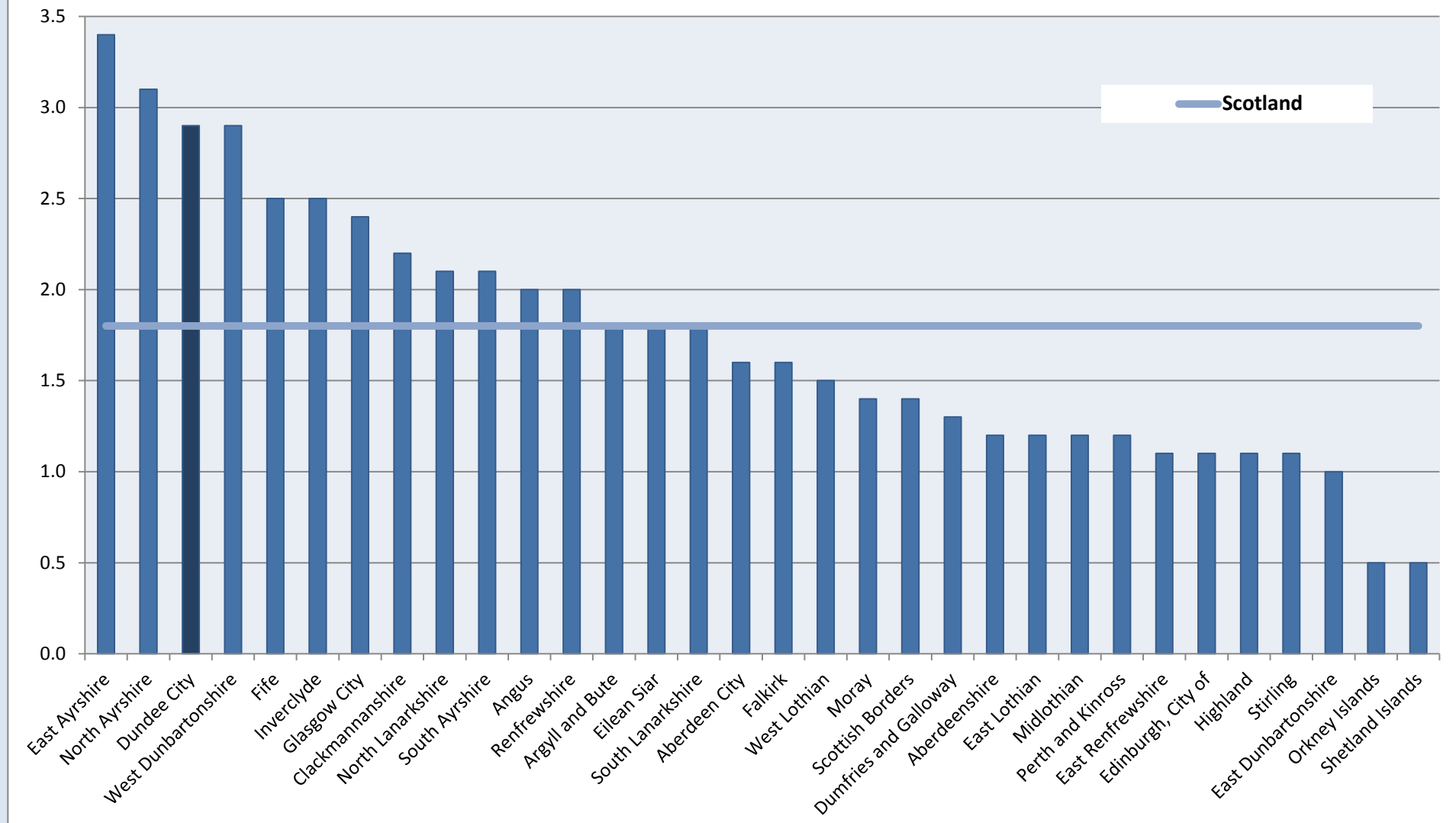
Source: ONS Claimant Count.

Longitudinal Dundee JSA Claimants by Age & Duration



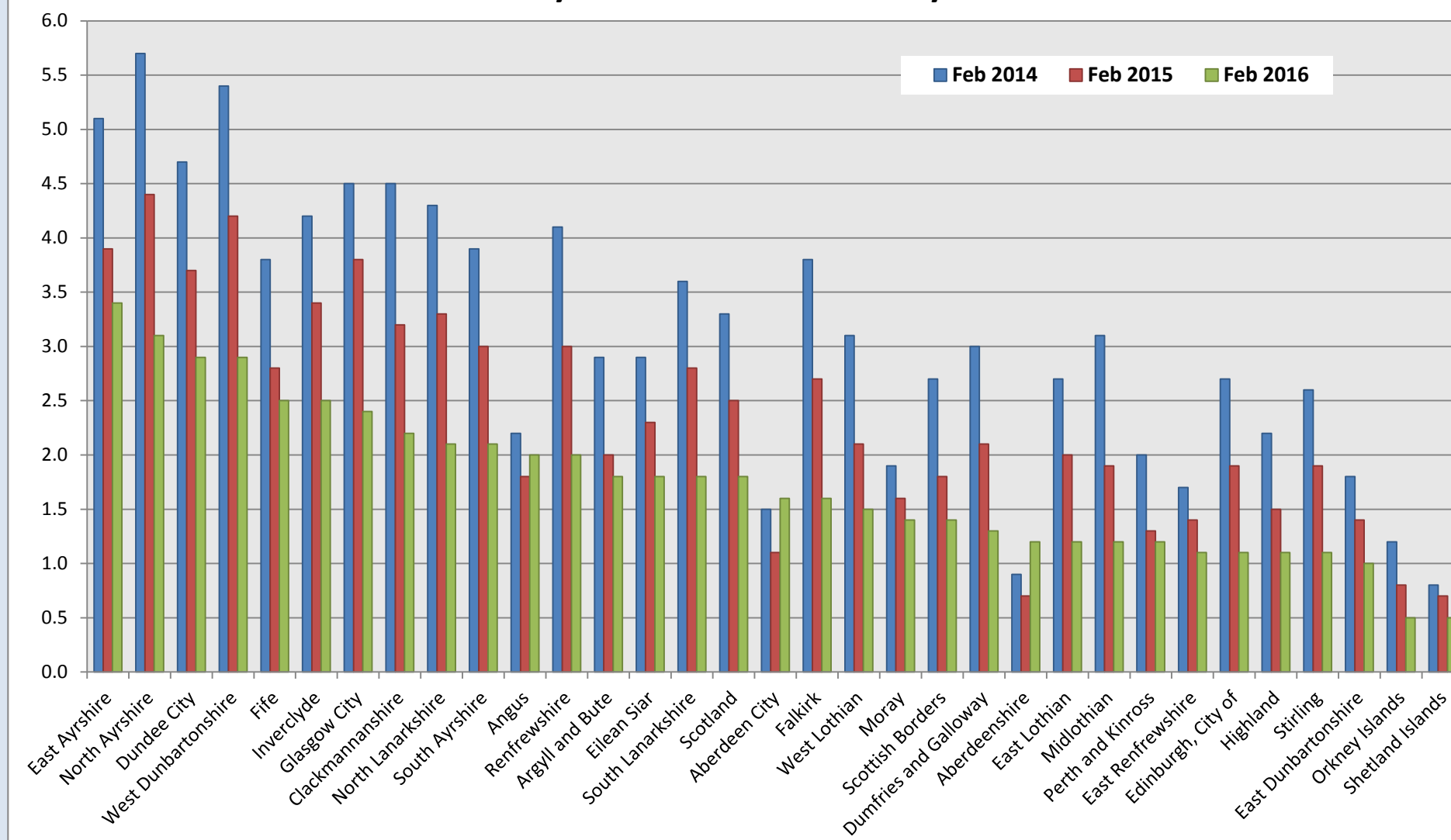
Source: ONS Jobseekers Allowance.

JSA Claimant Rates by Scottish Local Authority - February 2016



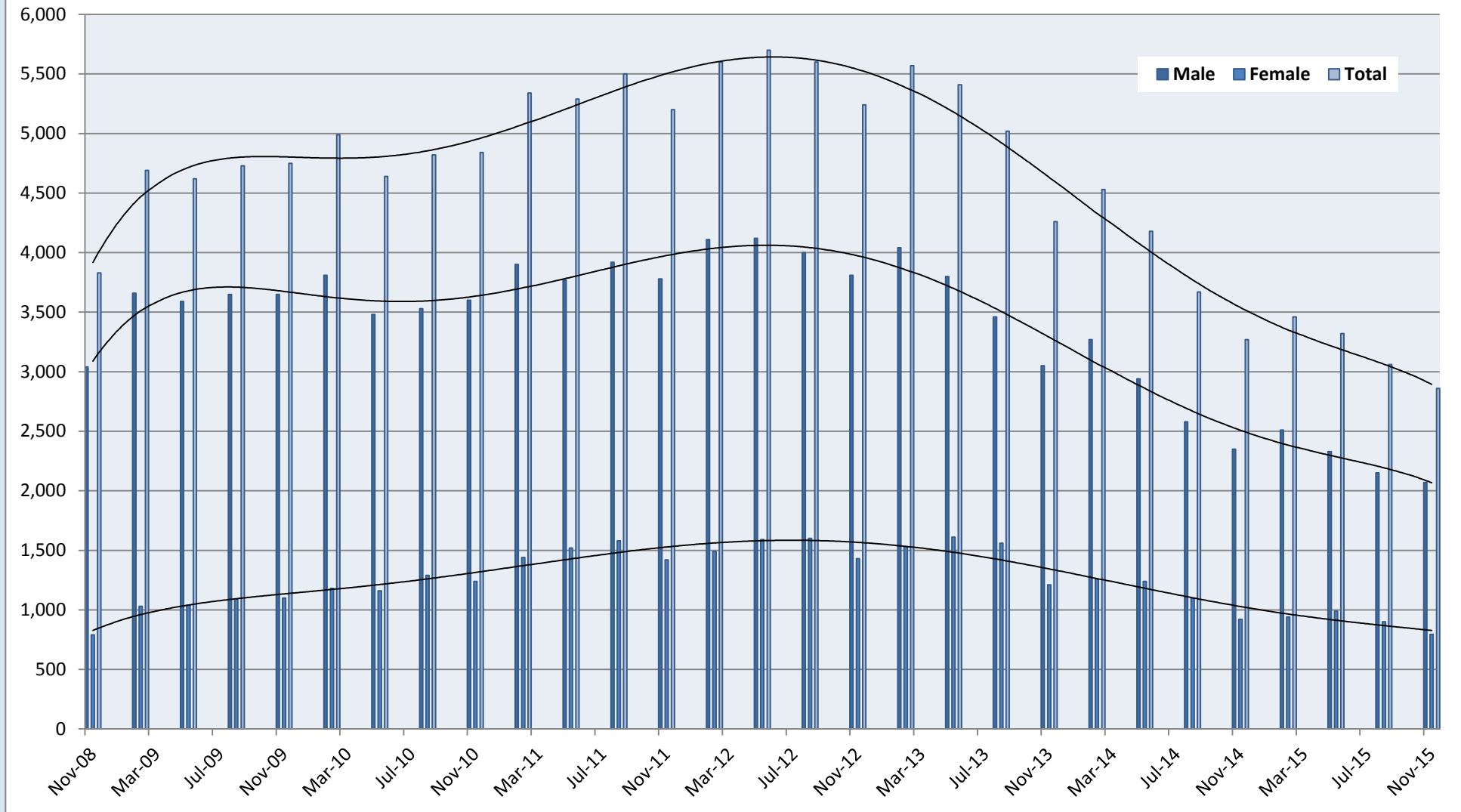
- In February 2016, Dundee City had the third highest Claimant Count of all Scottish Local Authority areas, at 2.9 per cent.

JSA Claimant Rates by Scottish Local Authority - Feb 2014-Feb 2016



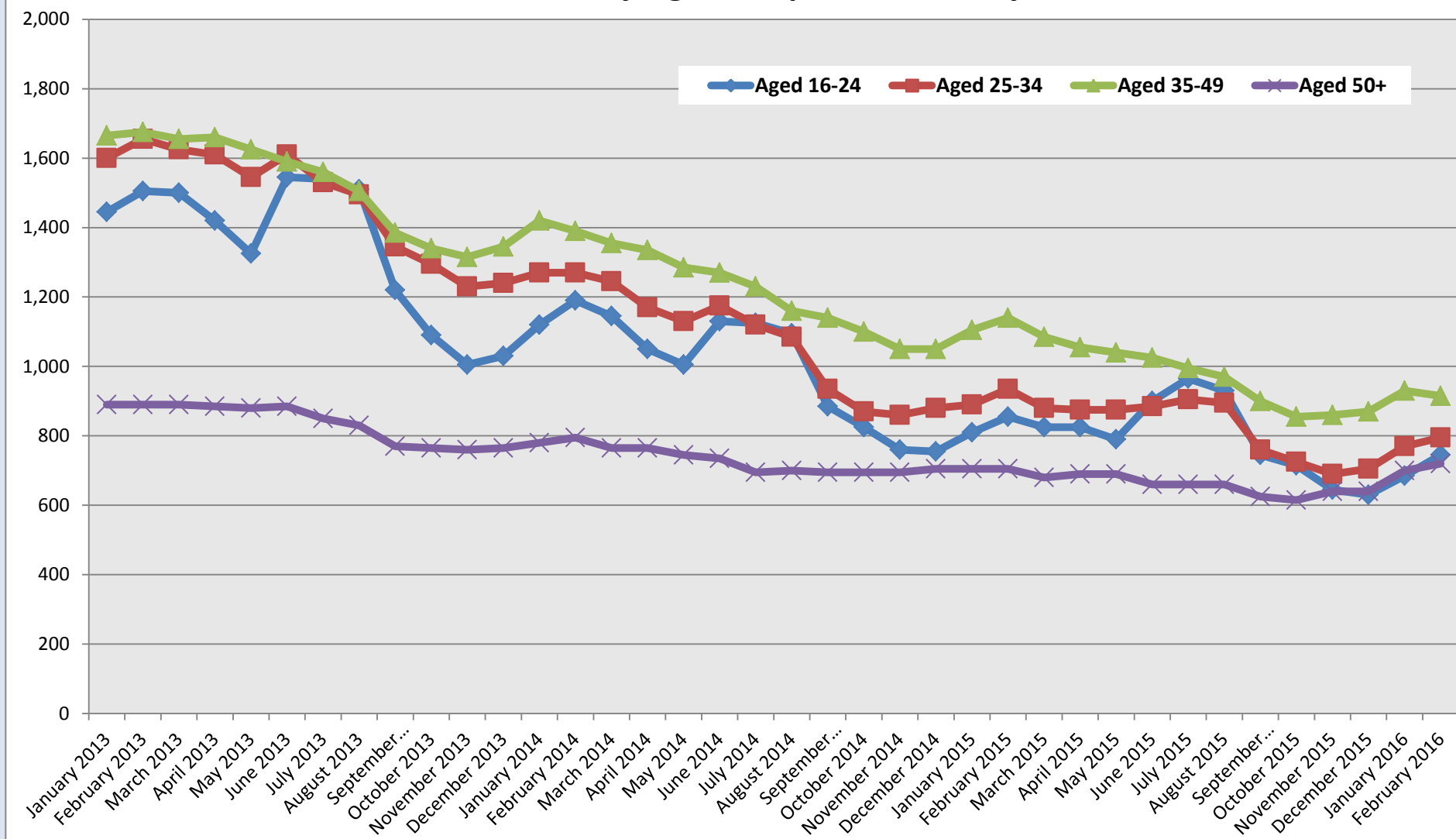
- The number of Claimants of JSA/UC* for Dundee is still relatively high in comparison, but has declined substantially over a two year period.

Jobseekers Allowance Claimants by Gender - Dundee City 2008-2015



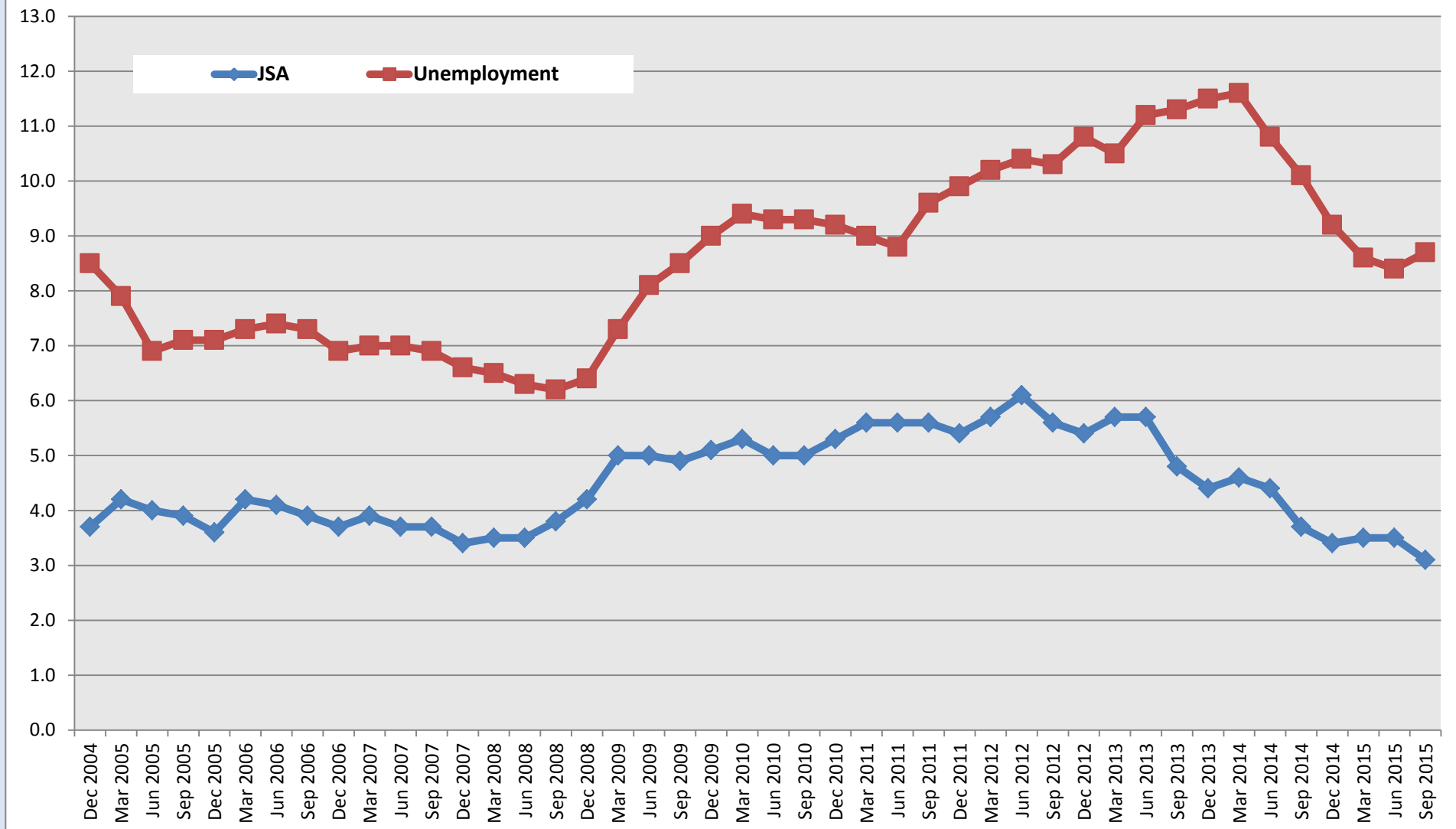
- The gender gap between male and female JSA claimants has reached its lowest level since the 2008 recession.

JSA Claimant Count by Age Group - Dundee City 2013-2016



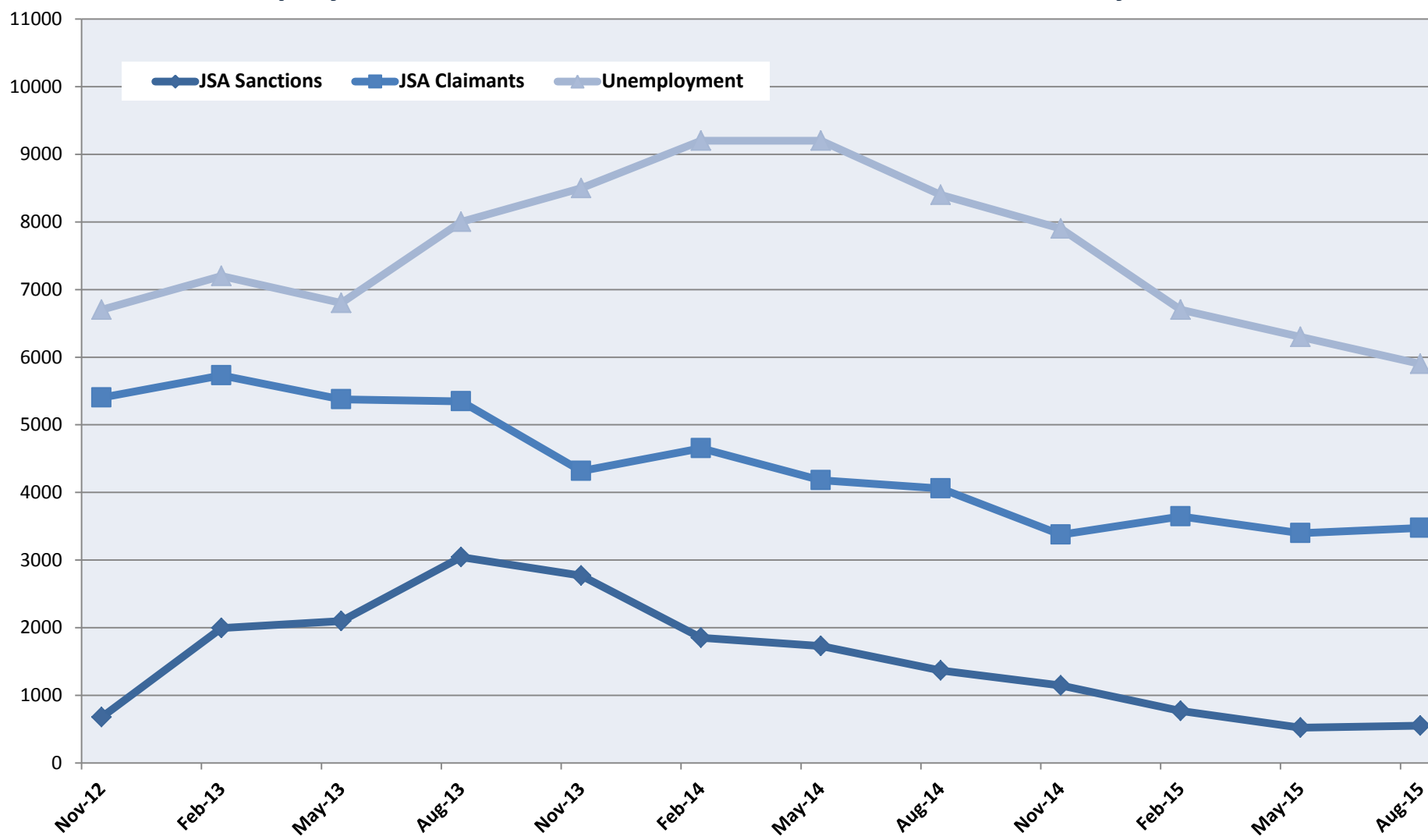
- The age profile of JSA Claimants has substantially changed, with claimants aged 16-24 and aged 50 plus accounting for a far larger proportion.

JSA Claimants & Unemployment - Dundee City 2004-2015



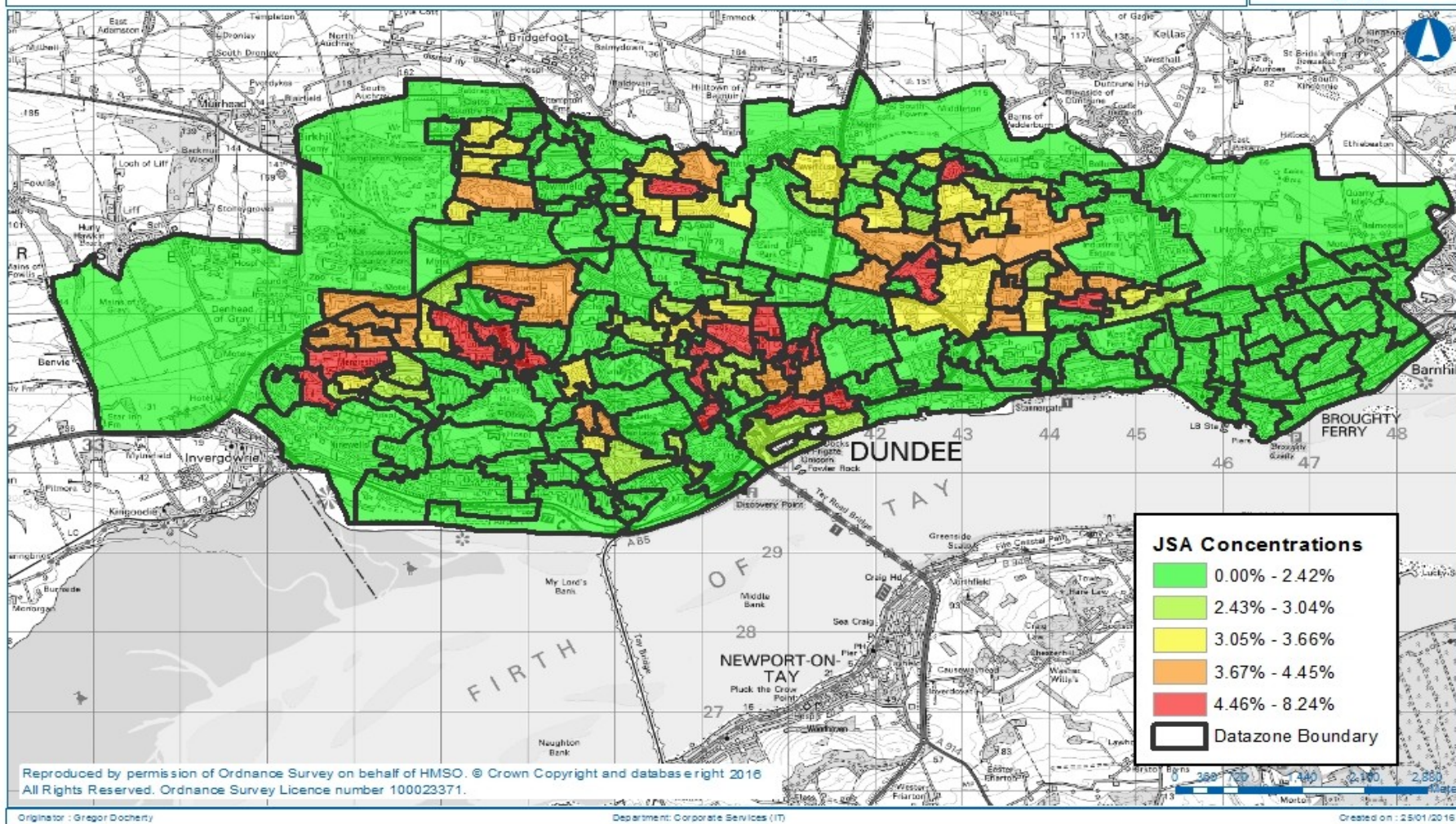
- JSA Claimants and Unemployment rates for Dundee have not followed an accepted causal relationship, demonstrating substantial departures.

Unemployment, JSA Claimants & JSA Sanctions - Dundee City 2012-15



■ Between June and August 2013, there were 3,017 JSA sanctions issued to claimants (*JSA sanctions expressed as quarterly totals).

Dundee City Jobseekers Allowance Claimant Concentrations per Head of Population by Datazone October 2015
 Source: DWP Claimant Count, October 2015



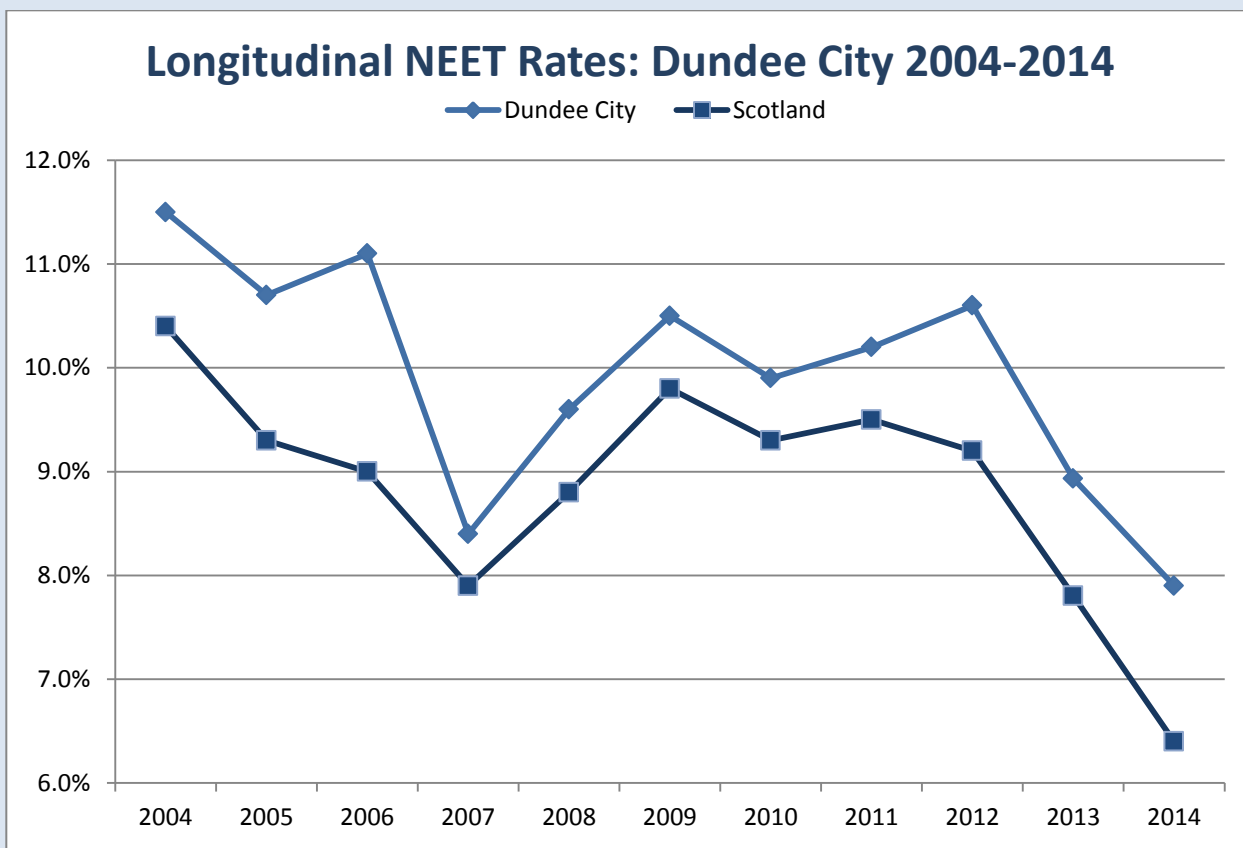
Dundee City Benefits Recipients by Statistical Group (Number & Rate) – November 2015														
2003 ward	Total Claimants		Job Seekers		ESA & IB		Lone Parents		Carers		Disabled		Aged 16-24	
	number	rate	number	rate	number	rate	number	rate	number	rate	number	rate	number	rate
Pitkerro	1,265	36.1	180	5.1	680	19.4	125	3.6	165	4.7	80	2.3	180	5.1
Longhaugh	955	25.8	150	4.1	470	12.7	100	2.7	140	3.8	70	1.9	135	3.6
Camperdown	945	28.8	155	4.7	520	15.8	95	2.9	100	3.0	55	1.7	135	4.1
Douglas	920	27.6	170	5.1	470	14.1	105	3.1	80	2.4	60	1.8	125	3.7
Stobswell	905	29.9	180	6.0	545	18.0	45	1.5	70	2.3	40	1.3	110	3.6
East Port	830	25.0	180	5.4	475	14.3	55	1.7	65	2.0	40	1.2	115	3.5
Balgowan	760	21.8	125	3.6	365	10.5	75	2.1	110	3.2	65	1.9	115	3.3
Hilltown	740	19.9	170	4.6	415	11.2	45	1.2	45	1.2	35	0.9	125	3.4
Lochee West	740	27.9	165	6.2	390	14.7	45	1.7	70	2.6	45	1.7	120	4.5
Bowbridge	725	24.2	135	4.5	430	14.3	45	1.5	55	1.8	40	1.3	75	2.5
Law	705	19.5	115	3.2	445	12.3	40	1.1	40	1.1	40	1.1	95	2.6
Fairmuir	700	24.9	110	3.9	440	15.6	40	1.4	45	1.6	40	1.4	70	2.5
Lochee East	615	22.7	110	4.1	365	13.5	30	1.1	55	2.0	40	1.5	70	2.6
Brackens	605	16.7	90	2.5	320	8.8	70	1.9	65	1.8	40	1.1	85	2.3
Ardler	590	26.6	100	4.5	325	14.6	45	2.0	75	3.4	35	1.6	70	3.2
Ninewells	560	16.9	105	3.2	325	9.8	60	1.8	35	1.1	25	0.8	90	2.7
Whitfield	515	21.6	85	3.6	265	11.1	45	1.9	60	2.5	45	1.9	70	2.9
Tay Bridges	505	9.4	120	2.2	315	5.8	20	0.4	20	0.4	20	0.4	75	1.4
Craigiebank	485	20.6	75	3.2	270	11.5	35	1.5	60	2.5	30	1.3	65	2.8
Logie	480	15.4	95	3.1	290	9.3	15	0.5	40	1.3	25	0.8	55	1.8
Claverhouse	475	15.0	70	2.2	255	8.0	25	0.8	70	2.2	40	1.3	65	2.0
Baxter Park	470	14.4	120	3.7	230	7.0	25	0.8	30	0.9	40	1.2	60	1.8
Balgay	450	14.3	65	2.1	275	8.7	35	1.1	35	1.1	25	0.8	50	1.6
Strathmartine	405	13.1	55	1.8	205	6.6	20	0.6	70	2.3	40	1.3	55	1.8
Broughty Ferry	295	9.5	35	1.1	185	6.0	10	0.3	30	1.0	20	0.6	30	1.0
Balgillo	265	6.4	25	0.6	140	3.4	10	0.2	40	1.0	30	0.7	30	0.7
Barnhill	245	8.1	30	1.0	155	5.1	10	0.3	20	0.7	25	0.8	25	0.8
Riverside	195	5.3	15	0.4	105	2.8	5	0.1	30	0.8	30	0.8	25	0.7
West Ferry	185	6.4	20	0.7	100	3.5	0	0.0	25	0.9	35	1.2	15	0.5
Dundee City	17,530	18.6	3,050	3.2	9,770	10.4	1,275	1.4	1,745	1.9	1,155	1.2	2,335	2.5

Source: ONS DWP Benefits Data, November 2015.

	JSA Claimants	JSA Sanction Referrals	Referral Rate	Adverse Sanction	Adverse Sanction Rate
Oct-12	5,515	492	8.9%	252	4.6%
Nov-12	5,401	483	8.9%	236	4.4%
Dec-12	5,294	548	10.4%	200	3.8%
Jan-13	5,604	833	14.9%	273	4.9%
Feb-13	5,732	614	10.7%	194	3.4%
Mar-13	5,667	656	11.6%	240	4.2%
Apr-13	5,572	663	11.9%	244	4.4%
May-13	5,375	780	14.5%	307	5.7%
Jun-13	5,635	1156	20.5%	433	7.7%
Jul-13	5,490	1009	18.4%	426	7.8%
Aug-13	5,346	879	16.4%	378	7.1%
Sep-13	4,738	1181	24.9%	438	9.2%
Oct-13	4,496	906	20.2%	403	9.0%
Nov-13	4,318	682	15.8%	249	5.8%
Dec-13	4,385	537	12.2%	182	4.2%
Jan-14	4,598	661	14.4%	254	5.5%
Feb-14	4,654	652	14.0%	261	5.6%
Mar-14	4,514	597	13.2%	258	5.7%
Apr-14	4,328	516	11.9%	251	5.8%
May-14	4,179	618	14.8%	272	6.5%
Jun-14	4,314	581	13.5%	304	7.0%
Jul-14	4,187	413	9.9%	219	5.2%
Aug-14	4,058	372	9.2%	177	4.4%
Sep-14	3,671	388	10.6%	159	4.3%
Oct-14	3,504	343	9.8%	170	4.9%
Nov-14	3,375	414	12.3%	178	5.3%
Dec-14	3,397	317	9.3%	119	3.5%
Jan-15	3,531	259	7.3%	155	4.4%
Feb-15	3,644	192	5.3%	109	3.0%
Mar-15	3,474	204	5.9%	113	3.3%
Apr-15	3,462	178	5.1%	97	2.8%
May-15	3,397	141	4.2%	81	2.4%
Jun-15	3,467	204	5.9%	100	2.9%
Jul-15	3,543	207	5.8%	72	2.0%
Aug-15	3,476	139	4.0%	58	1.7%
Sep-15	3,050	199	6.5%	102	3.3%

Source: DWP Stat-Xplore; ONS Jobseekers Allowance.

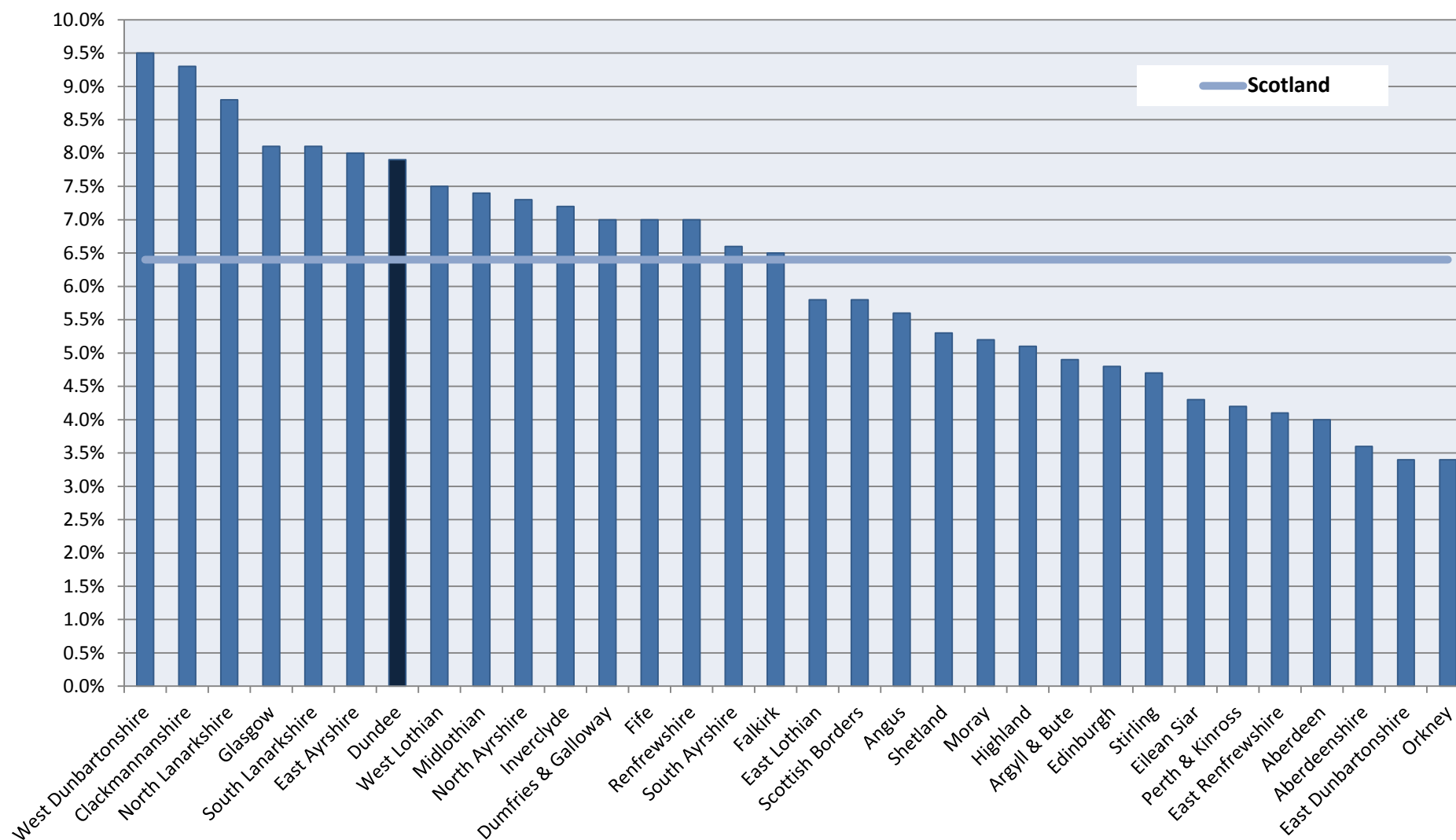
- Under the post-2012 JSA Sanction Regime, Dundee City JSA Claimants have experienced sanction rates substantially higher than other areas in Scotland.
- By September 2013, when unemployment in the city was at a historic high, 24.9 per cent of JSA claimants received a JSA sanction referral, with 9.2 per cent, 440 of 4,700 claimants receiving an adverse (upheld) sanction decision.



Source: The Scottish Government: NEET Statistics.

- The number of people aged 16-19 Not in Education, Employment or Training (NEET) in Dundee City fell by 2.9 per cent between 2012 and 2014, from 10.6 per cent in 2012 to 7.9 per cent in 2014. The Scottish National average NEET rate fell by 2.8 per cent during the same period, from 9.2 per cent in 2012 to 6.4 per cent in 2014.
- The NEET Rate for Dundee City in 2014 declined to the lowest point in the 10 year period as of 2014, having recovered to levels preceeding the global economic recession and economic austerterity.
- In 2014, Dundee City had the seventh highest NEET Rate of all 32 Scottish Local Authority areas, with West Dunbartonshire, Clackmannanshire, North Lanarkshire, Glasgow City, South Lanarkshire and East Ayrshire having higher rates.

NEET Rates by Scottish Local Authority 2014



Source: The Scottish Government 'Evaluation of Measurement Options for Those Aged 16-19 Not in Employment, Education or Training (NEET).'

Income and Earnings

Median Gross Annual Pay (Full-Time employees) – 2012-2015

	2015	2012	% change
Dundee City	£24,090	£21,913	9.93
Aberdeen City	£30,204	£28,342	6.57
Edinburgh, City of	£30,033	£28,482	5.45
Glasgow City	£27,417	£24,443	12.17
Scotland	£27,732	£25,907	7.04

Median Gross Weekly Pay (all employees) – 2014-2015

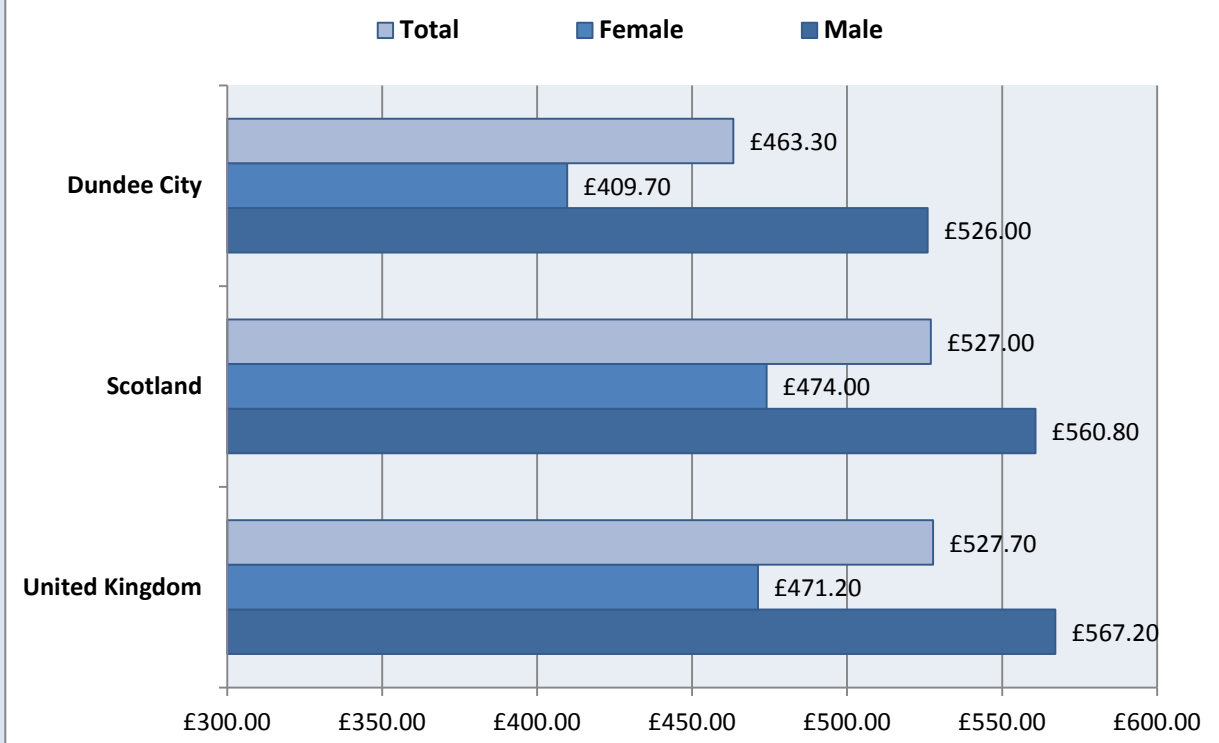
	2015	2014	% change
Dundee City	£380.00	£390.20	-2.61
Aberdeen City	£479.10	£467.70	2.44
Edinburgh, City of	£459.80	£443.60	3.65
Glasgow City	£412.80	£385.30	4.43
Scotland	£425.10	£413.70	2.76

Income Distribution FTE Per Annum – Dundee City & Scotland 2015

	Dundee City (£)	Scotland (£)	Proportion (%)
10 th Percentile	14,512	15,437	6.4
20 th Percentile	17,420	18,603	6.8
30 th Percentile	19,440	21,369	9.9
40 th Percentile	21,574	24,343	12.8
Median	24,090	27,732	15.1
60 th Percentile	27,665	31,364	13.4
70 th Percentile	31,725	35,229	11.0
80 th Percentile	35,833	40,781	13.8
90 th Percentile	41,760*	51,370	23.0

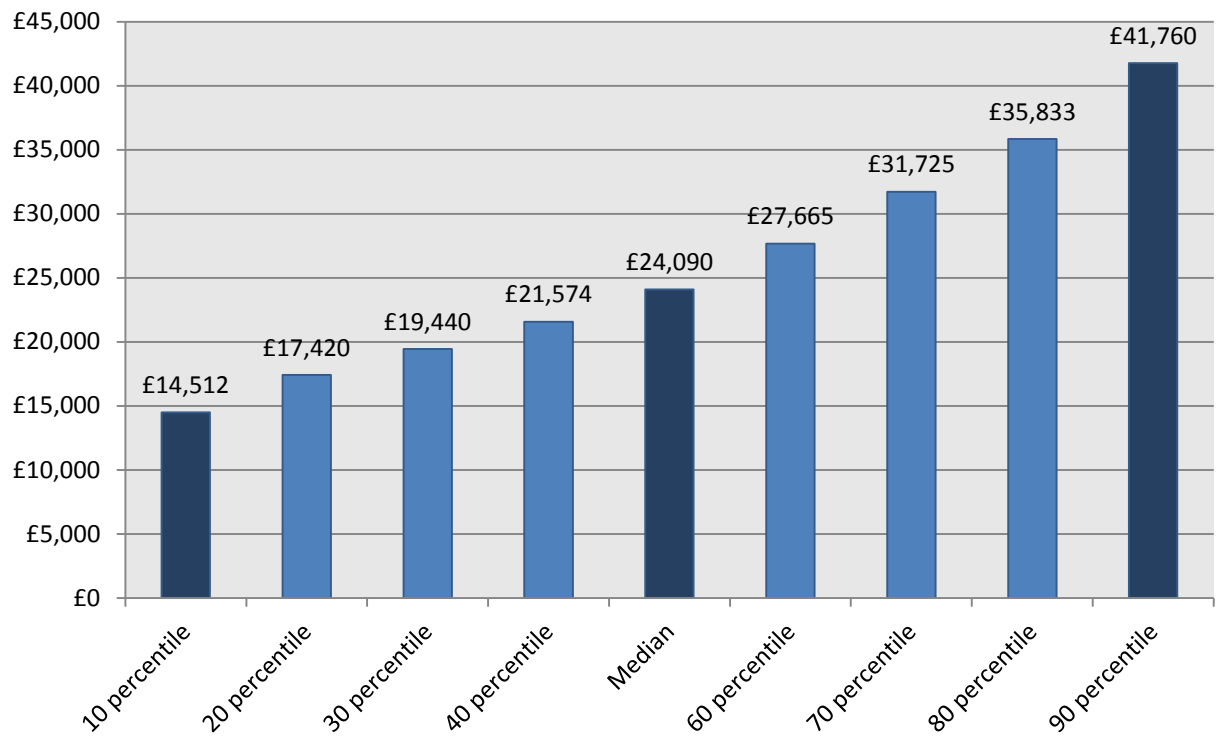
Source: ONS annual survey of hours and earnings 2015 (*estimate).

Median Gross Weekly Pay (FTE) 2015



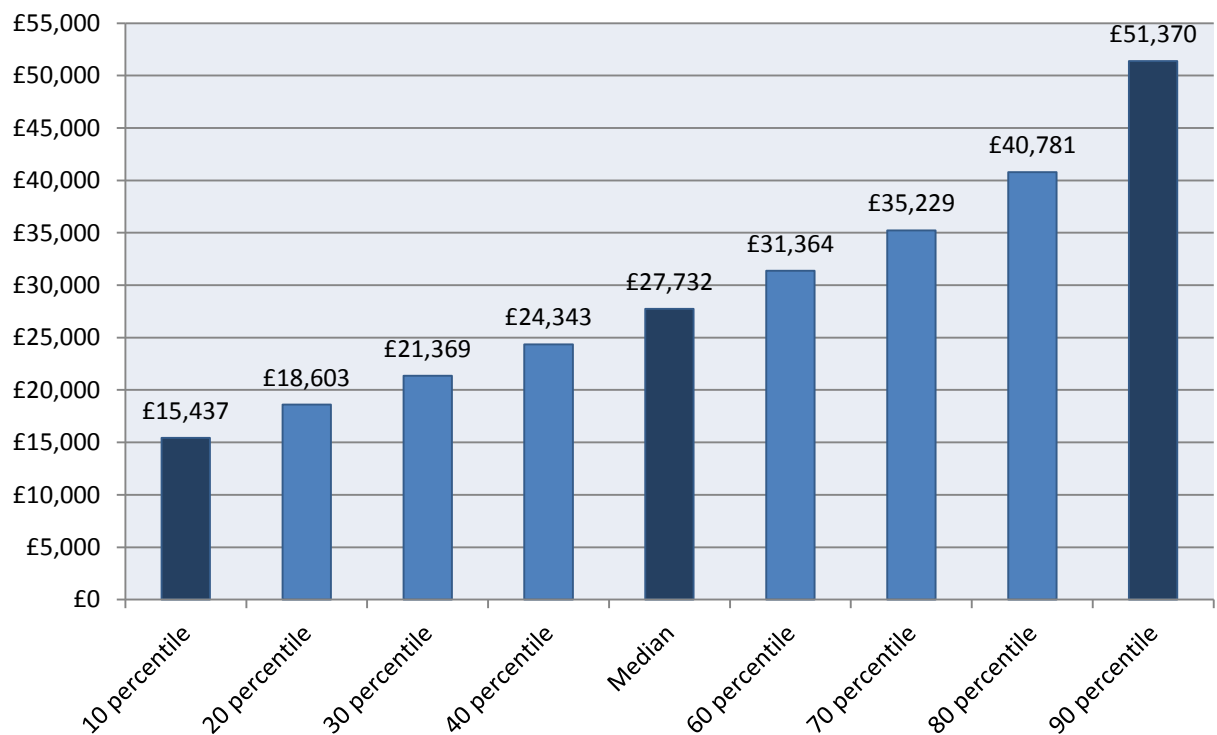
- In 2015, median gross weekly pay for the resident workers of Dundee City for full-time employees was £409.70. The Scottish national average median gross weekly pay for full-time employees was more than £60 higher, at £474.00. This is a reflection of the structure of sector employment in Dundee in relation to workers who live with Dundee, which had substantially less full-time employment within the highest paying and gross value adding sectors in 2015, such as energy and financial services.
- Full-time gross median pay for females in Dundee was £80 less per week than the Scottish national average, with weekly pay for males in Dundee being approximately £34 less per week than the national average.
- Gross annual income for Dundee City in 2015 was £24,090 for full-time employees, compared to the Scottish national average £27,732 per annum.
- Full-time employees in Dundee had a larger proportional share of gross annual income at the lower end of earnings, whilst higher earning groups had a substantially less proportional share compared to the Scottish national average.
- Wages for those living in Dundee City were substantially lower than the national average and for those working but not living in Dundee.

Gross Annual Income FTE - Dundee City 2015

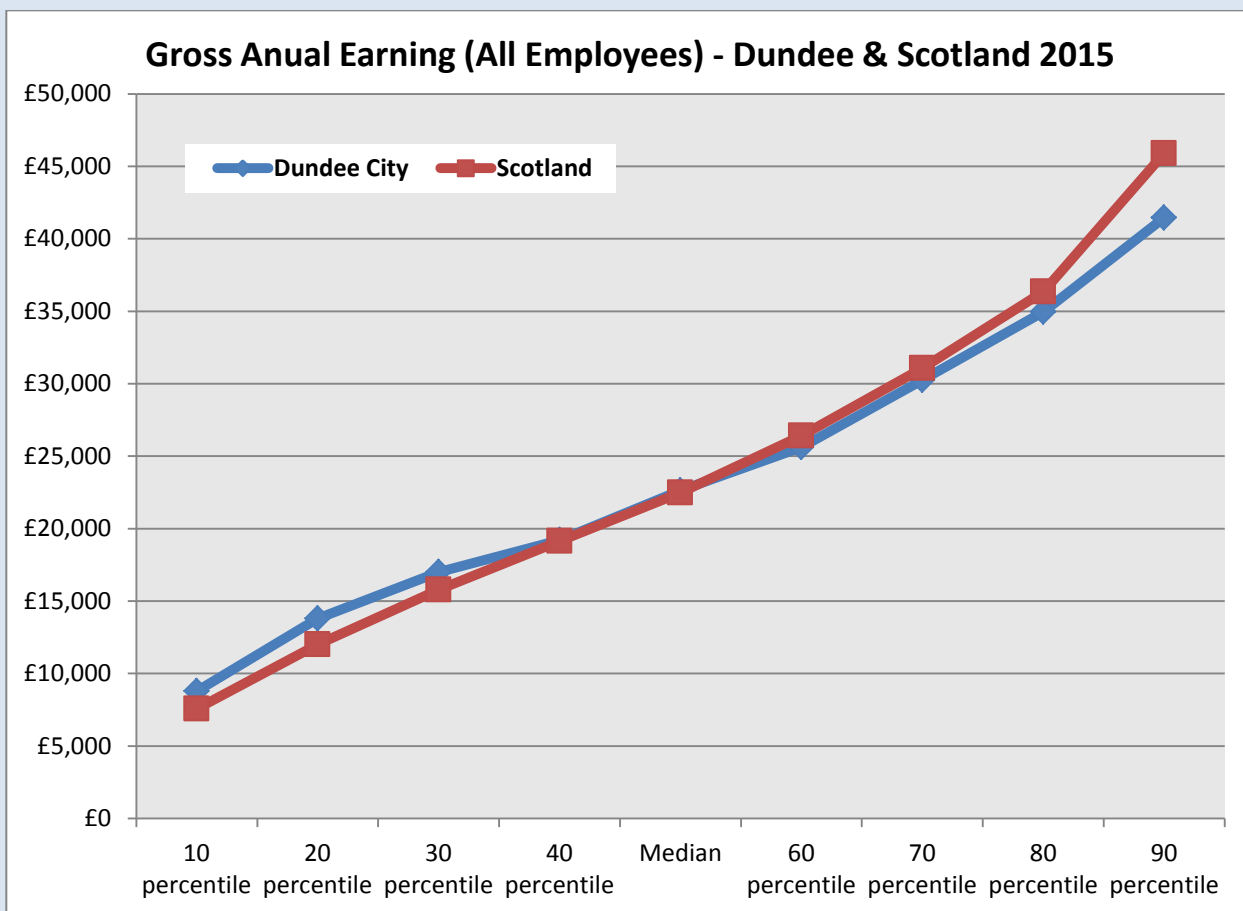


Source: ONS Annual Survey of Hours and Earning 2015.

Gross Annual Income FTE - Scotland 2015



Source: ONS Annual Survey of Hours and Earning 2015.



Source: ONS Annual Survey of Hours and Earnings 2015.

Gross Annual Earnings (All Employees) – Dundee City & Scotland 2015

Upper Tail Income Ratio (50th/90th Percentile)

	Ratio	90 th Percentile	50 th Percentile
Dundee City	0.55	£41,460	£22,631
Scotland	0.49	£45,884	£22,476

Lower Tail Income Ratio (10th/50th Percentile)

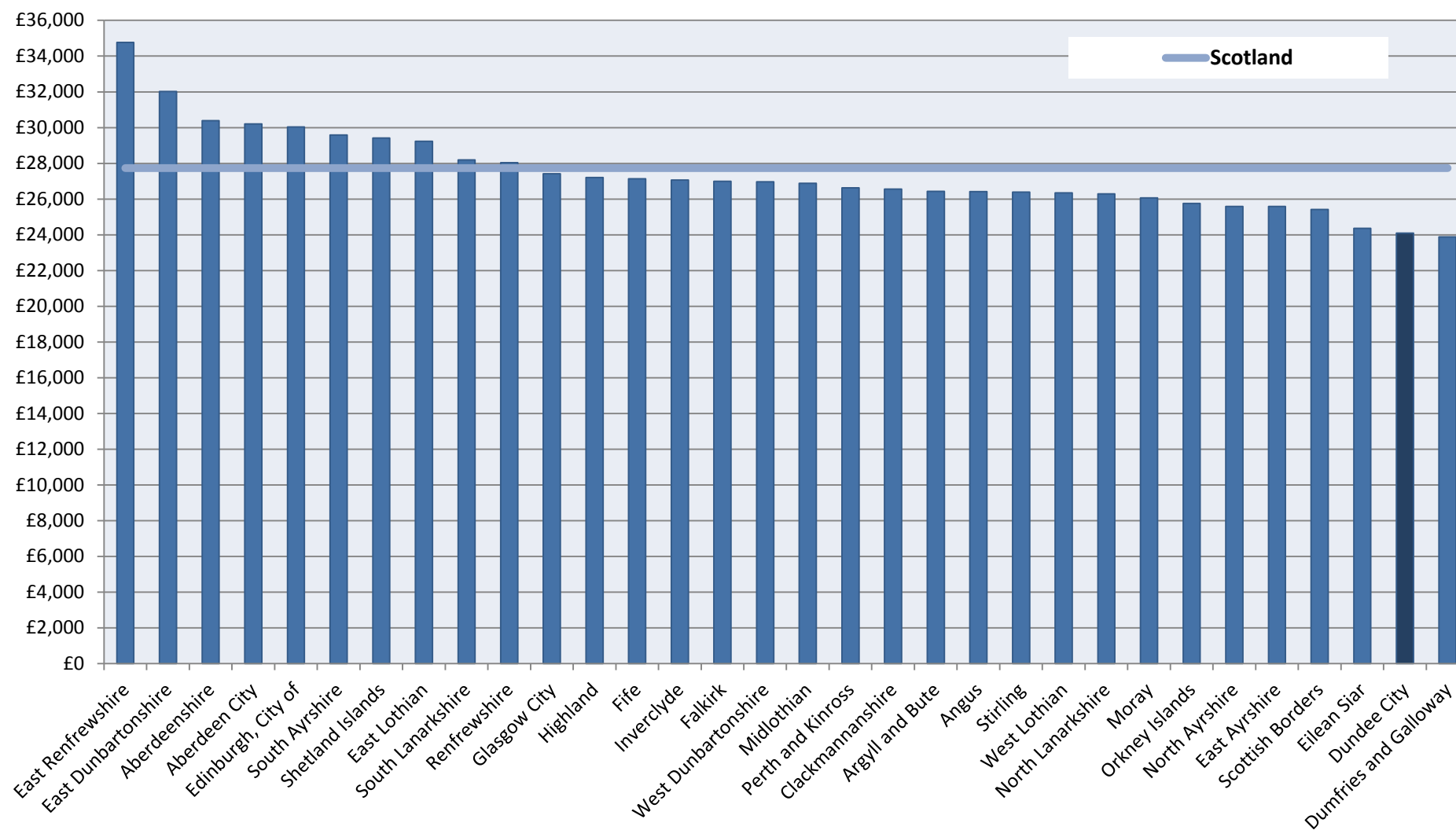
	Ratio	50 th Percentile	10 th Percentile
Dundee City	0.38	£22,631	£8,779
Scotland	0.33	£22,476	£7,573

Total Income Distribution Ration (10th/90th Percentile)

	Ratio	90 th Percentile	10 th Percentile
Dundee City	0.21	£41,460	£8,779
Scotland	0.17	£45,884	£7,573

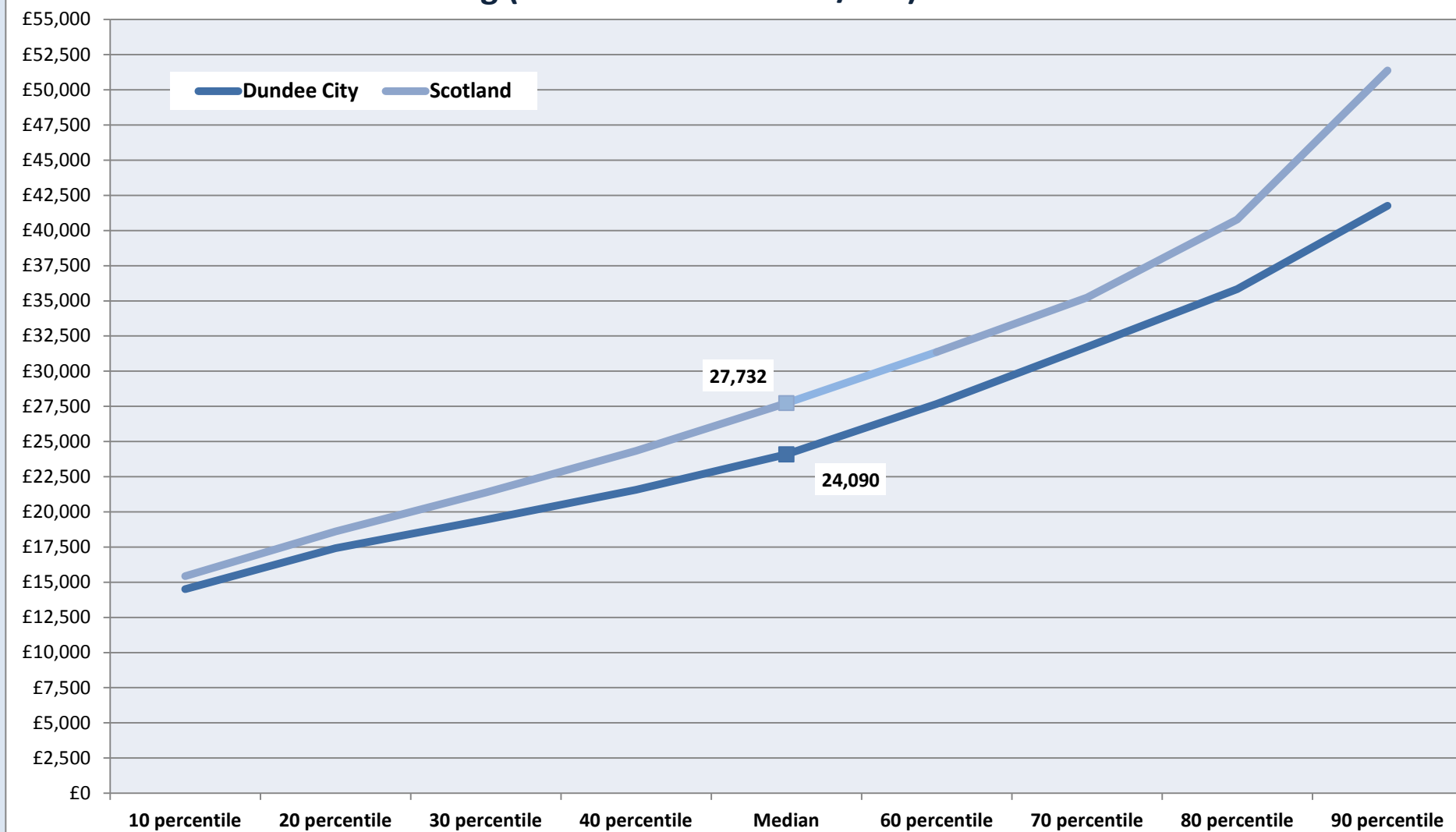
Source: ONS Annual Survey of Hours & Earnings 2015

Median Gross Annual Pay (FTE) by Scottish Local Authority 2015



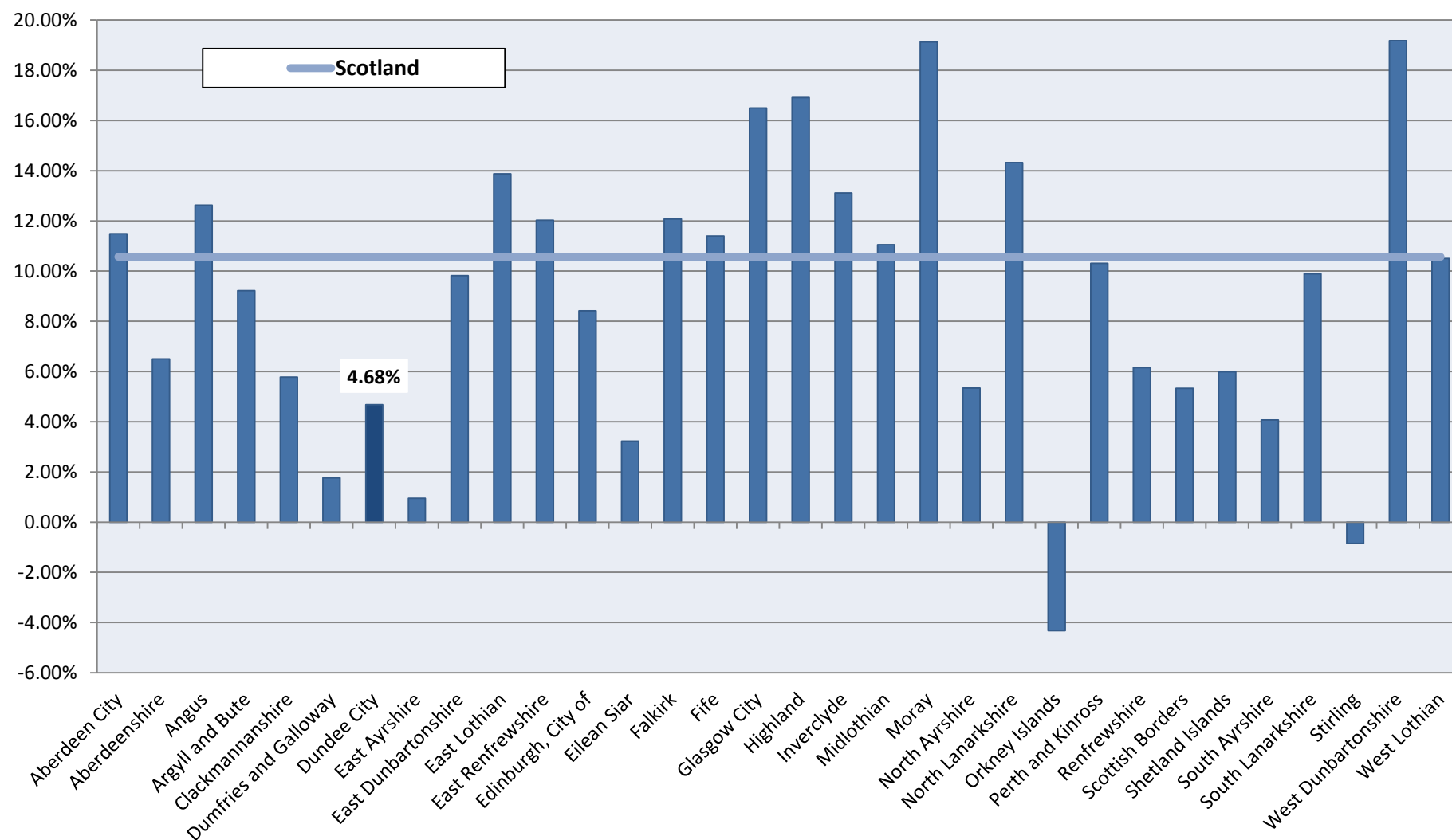
- Median Gross Annual Pay for full time employees who lived in Dundee City was the second lowest of any Scottish local authority in 2015.

Gross Annual Earning (10th-90th Percentile/FTE) - Dundee & Scotland 2015



Source: ONS Annual Survey of Hours and Earnings 2015; *Model-based estimate used for Dundee City FTE earnings at 90th percentile

Change (%) in Gross Median (FTE) Annual Earnings - Scotland 2010-2015



Source: ONS Annual Survey of Hours and Earnings 2015

Property and Housing

Quarterly Residential Property Prices (Mean) – Dundee City & Scotland, December 2015

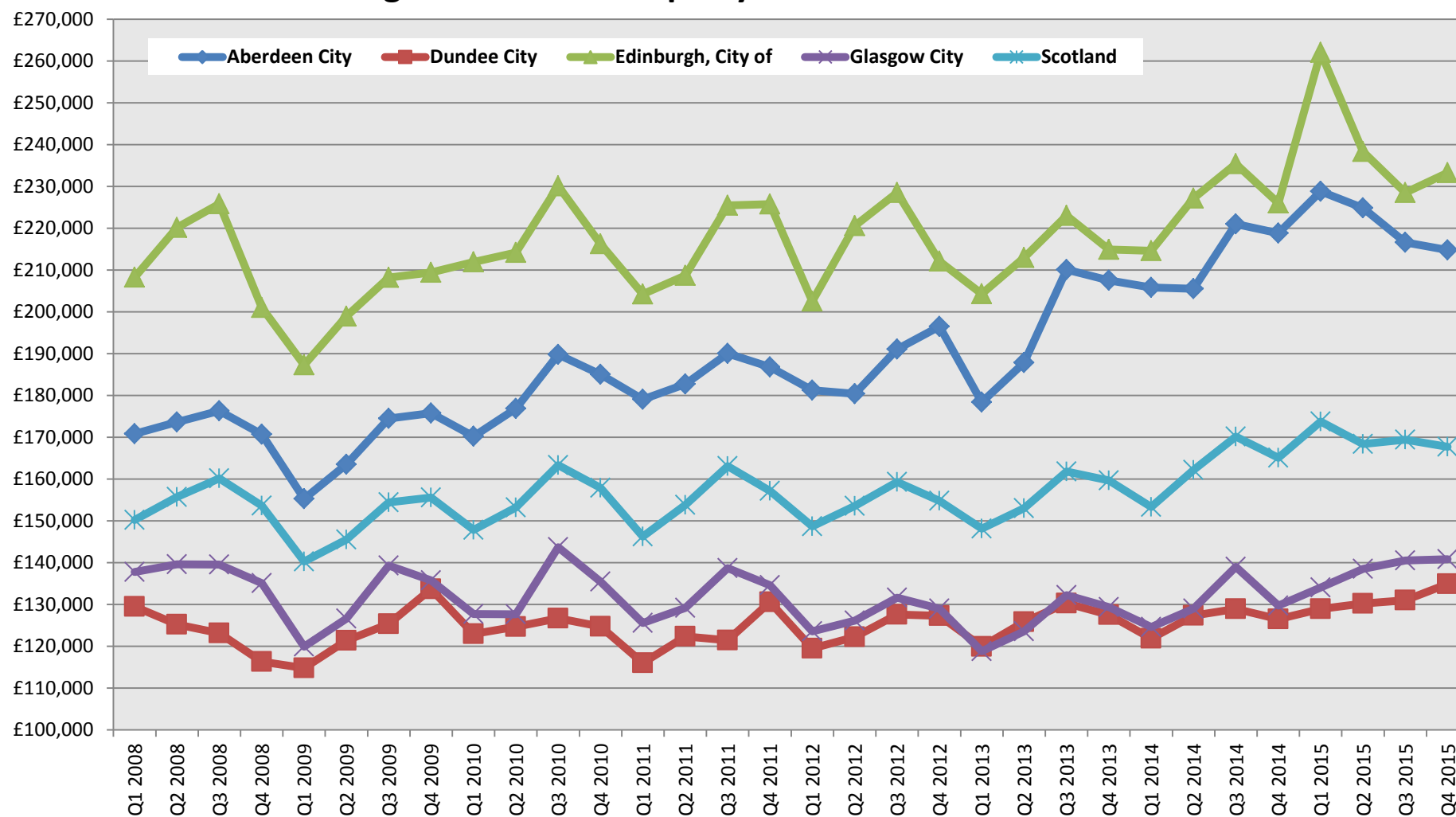
	Oct – Dec 2015	Oct – Dec 2014	Annual % change	Jul – Sep 2015	Quarterly % change
Dundee City	£134,945	£126,529	6.7	£131,043	3.0
Aberdeen City	£214,799	£218,804	-1.8	£216,656	-0.9
Edinburgh, City of	£233,255	£226,022	3.2	£228,538	2.1
Glasgow City	£140,837	£129,733	8.6	£140,534	0.2
Scotland	£167,734	£165,138	1.6	£169,411	-1.0

Quarterly Residential Property Sales (Volume) – Dundee City & Scotland, December 2015

	Oct – Dec 2015	Oct – Dec 2014	Annual % change	Jul – Sep 2015	Quarterly % change
Dundee City	710	576	23.3	646	9.9
Aberdeen City	1,274	1,447	-12.0	1,414	-9.9
Edinburgh, City of	3,532	2,909	21.4	3,464	2.0
Glasgow City	3,337	2,789	19.6	3,236	3.1
Scotland	28,779	25,130	14.5	27,491	4.7

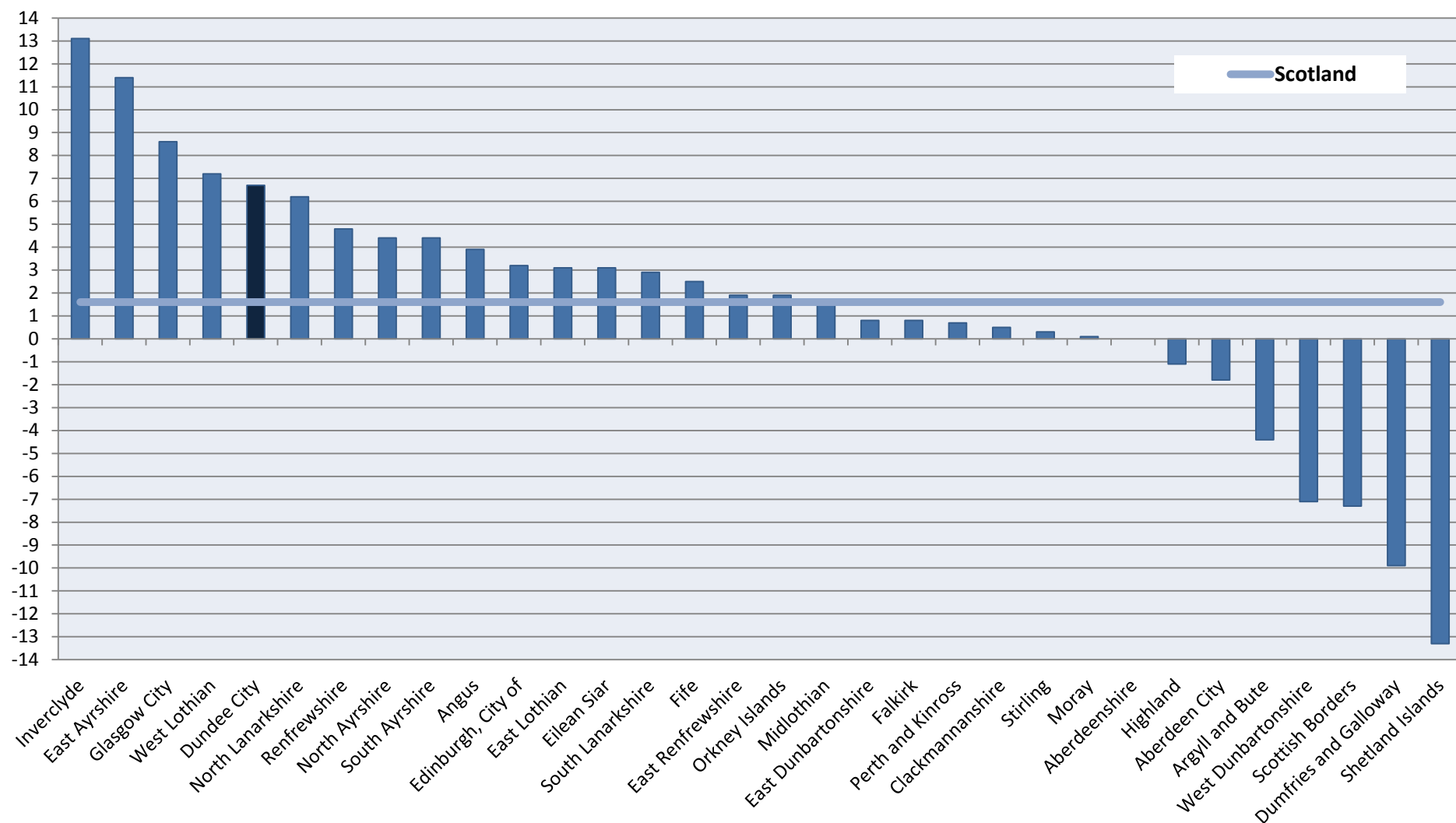
Source: Registers of Scotland: Quarterly House Prices Report

Average Residential Property Prices - Scotland 2008-2015



Source: Registers of Scotland: Quarterly House Prices Report

Average Residential Property Prices (% Change) - Scotland Dec 2014-15



- In December 2015, Dundee had the fifth highest annual increase of residential property prices in Scotland, increasing by 6.7 %.

Appendix 1: Labour Market Definitions

Employment Rate – The number of people of working age currently either employed or self-employed. The headline employment rate is a measure of the percentage of people aged 16 to 64 who are employed as a proportion of the total population of that age group.

Unemployment – Unemployment is measured by the International Labour Organisation's Unemployment indicator. It is an internationally accepted measure of unemployment that assesses the number of jobless people who want to work, are available to work and are actively seeking employment. The Office for National Statistics measures this using the Annual Population Survey, sampling those without a job who have been actively seeking work in the past 4 weeks and are available or waiting to start work in the next 2 weeks.

Economically Active – Persons aged 16 plus either employed, self-employed or unemployed. The economic activity rate at national and sub-national level is an expression of the working age population aged 16 to 64 who are either employed, self-employed or unemployed.

Economically Inactive – Economically inactive people represent those of a working age 16-64 who are not employed and have not actively been seeking work in accordance with those classed as unemployed. This group includes students, those with illness and people looking after family.

Claimant Count – The Claimant Count is a new figure, designated an experimental statistic by the Office for National Statistics. It represents the number of people claiming Jobseeker's Allowance plus those who claim Universal Credit who are out of work. The Claimant Count replaces the number of people claiming Jobseeker's Allowance as the headline indicator of the number of people claiming benefits principally for the reason of being unemployed. The Claimant Count no longer holds the designation of a national statistic.

Jobseekers Allowance – The principle out-of-work benefit for unemployed people actively seeking work. The introduction of Universal Credit means that this no longer accounts for the number of people principally claiming unemployment related benefits.

Gross Value Added (GVA) – the value added by any unit engaged in production above the inputs of production. This represents the total level of productive output for any given industry sector.

Appendix 2: Sources

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