

# Moray Dataset

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March 2016





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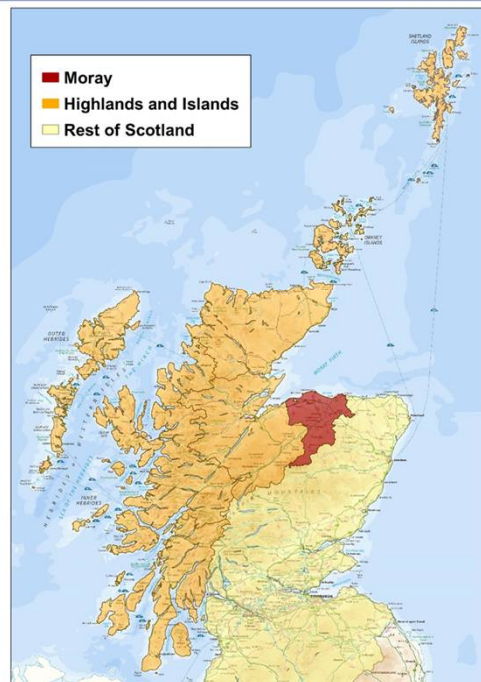
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## Introduction



- **2011 Census Population of 93,295**
  - Mid 2014 Estimate of 94,750
- **Population growth of 7.3% between the 2001 and 2011 Census of Population**
- **2014 population density of 42.3 people per km<sup>2</sup>**
- **Principal settlement is Elgin**
  - Elgin to Inverness – 39 miles
  - Elgin to Aberdeen – 64 miles
  - Elgin to Glasgow – 189 miles
  - Elgin to Edinburgh – 176 miles
  - Elgin to London – 580 miles



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- Distances from Elgin are given by land transport.



## Map of the Area and Transport Links



- 41.8% of the population (39,577 people) live in the settlements of Elgin or Forres
- Inverness to Aberdeen train service stops at Forres, Elgin and Keith
- The area has close ties to Aberdeenshire and Aberdeen as well as Inverness and the Highlands
- Inverness and Aberdeen international airports accessible by road (A96) and rail



# Demographics



## Population Change, 2001 to 2011 and 2011 to 2014

	2001 Population	2011 Population	Number Change 2001-2011	% Change 2001-2011
Moray	86,940	<b>93,295</b>	6,355	7.3
Highlands and Islands	433,524	<b>466,112</b>	32,588	7.5
Scotland	5,062,011	<b>5,295,403</b>	233,392	4.6

	Mid-2014 Estimate	Number Change 2011-2014	% Change 2011-2014
Moray	<b>94,750</b>	1,455	1.6
Highlands and Islands	<b>467,361</b>	1,249	0.3
Scotland	<b>5,347,600</b>	52,197	1.0

### Main Settlements

Elgin	23,395	26,034	2,639	11.3
Forres	11,666	12,578	912	7.8
Lossiemouth	8,563	9,197	634	7.4
Buckie	8,741	9,095	354	4.0
Keith	4,597	4,694	97	2.1

	26,819	785	3.0
	12,758	180	1.4
	9,287	90	1.0
	9,327	232	2.6
	4,726	32	0.7

Sources: 2001 and 2011 Censuses of Population

Sources: 2011 Census & Mid-2014 Population Estimates, National Records of Scotland

## Total Population, Males, Females and Working Age (16-64), 2014

	2014 Population Estimate	Males		Females		Working Age Population	
		Number	% of population	Number	% of population	Number	% of population
Moray	<b>94,750</b>	46,656	49.2	48,094	50.8	59,151	62.4
Highlands and Islands	<b>467,361</b>	229,430	49.1	237,931	50.9	288,235	61.7
Scotland	<b>5,347,600</b>	2,596,384	48.6	2,751,216	51.4	3,467,929	64.9

Source: Mid-2014 Population Estimate, National Records of Scotland

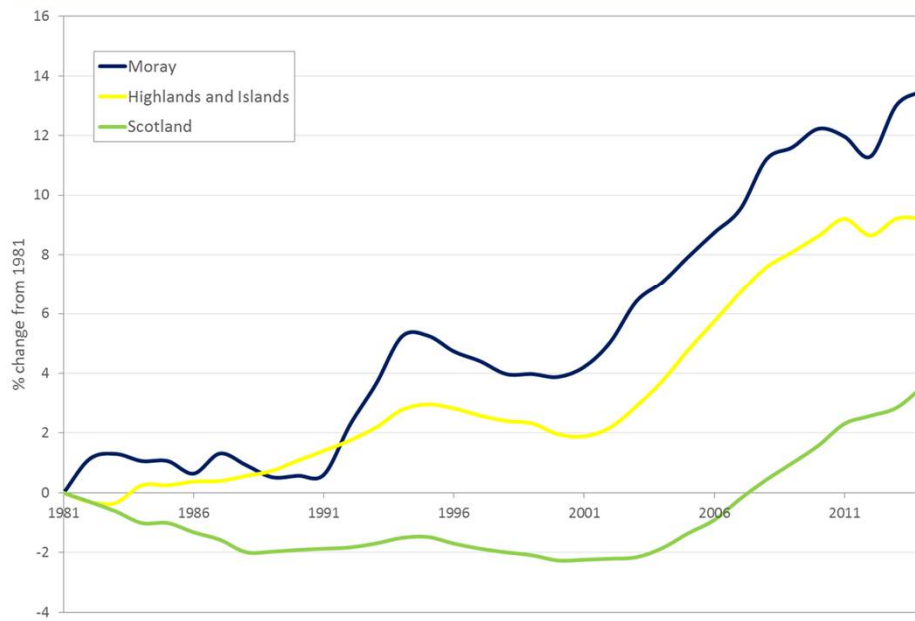
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- Moray experienced population growth of 7.3% between 2001 and 2011, a rate of growth slightly below that of the Highlands and Islands and well above that of Scotland. Moray was the eighth fastest growing Local Authority area in Scotland in this period.
- There was estimated population growth of 1.6% in Moray between 2011 and 2014, higher than the growth estimated in the Highlands and Islands (0.3%) and Scotland (1.0%). Mid-Year Estimates are, however, less robust than Census data.
- Mid-2015 Population Estimates and revised Population Estimates for Mid-2012, Mid-2013 and Mid-2014 will be released on the 28<sup>th</sup> April 2016.



## Historical Population Change

% Change from 1981 Population



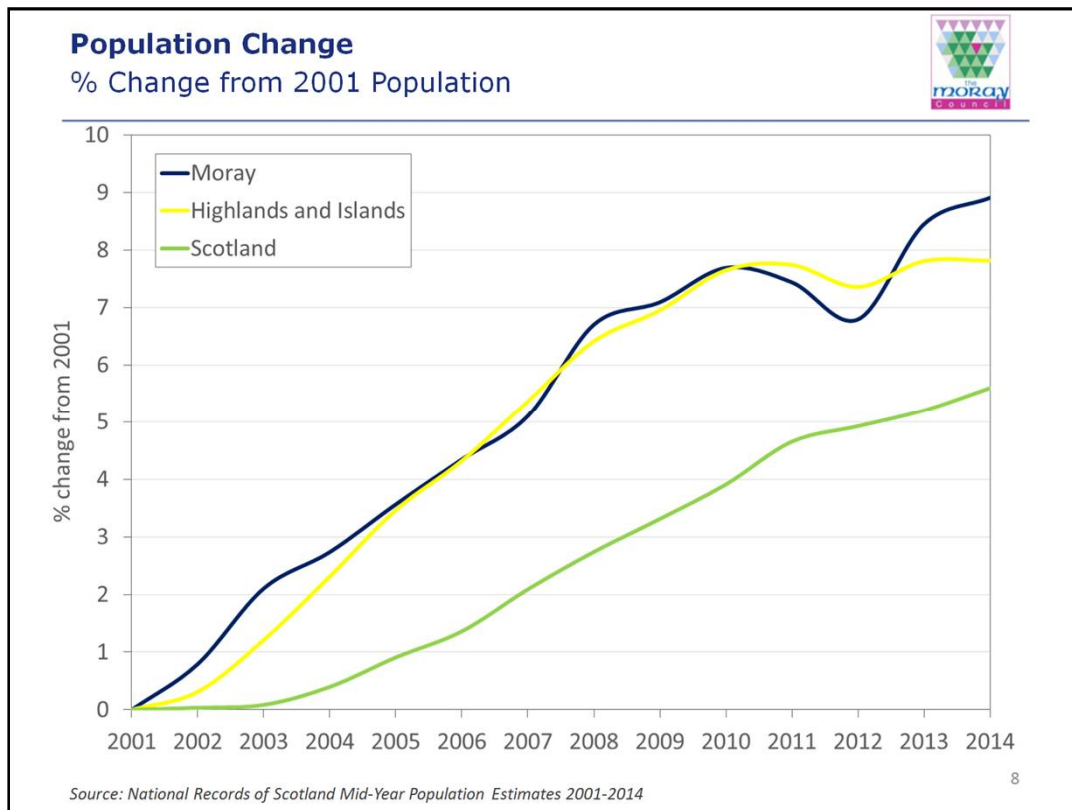
Source: National Records of Scotland Mid-Year Population Estimates 1981 – 2014

Note: Highlands and Islands figures relate to the six main local authorities that make up the region

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- The population of Moray has grown by around 13.5% since 1981.





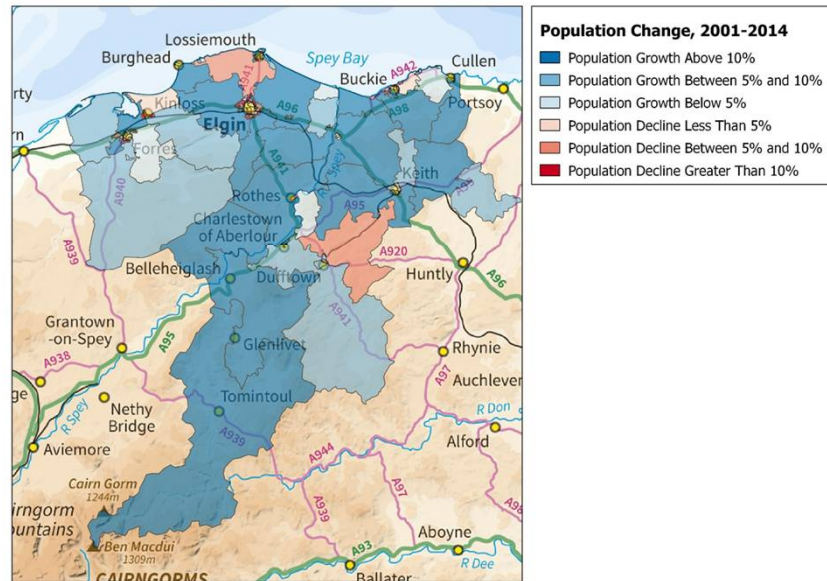
- Between 2001 and 2014, population change in Moray followed a similar pattern of growth to that of the Highlands and Islands overall, which was faster than that of Scotland.



## Population Change by Datazone



Population Change by Datazone, 2001-2014



Sources: 2001 Census of Population, 2014 Mid-Year Estimates

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- The population of Elgin increased by 11.3% over the thirteen year period due to very strong population growth in areas on its outskirts (surrounding rural datazones included in the settlement definition).



## Age Structure, 2014



### All People

	Moray		H&I	Scotland
	Number	%	%	%
All Ages	94,750			
Total 0-15	16,599	17.5	16.9	17.0
Total Working Age (16-64)	59,151	62.4	61.7	64.9
16-29	15,467	16.3	14.9	18.3
30-49	24,241	25.6	24.9	26.6
50-64	19,443	20.5	21.9	20.0
Total 65+	19,000	20.1	21.4	18.1
65-74	10,565	11.2	12.1	10.0
75-89	7,686	8.1	8.5	7.4
90+	749	0.8	0.9	0.7

### Males

	Moray		H&I	Scotland
	Number	%	%	%
All Ages	46,656			
Total 0-15	8,542	18.3	17.7	17.9
Total Working Age	29,601	63.4	62.4	65.6
16-29	8,064	17.3	15.8	18.8
30-49	11,959	25.6	24.6	26.7
50-64	9,578	20.5	22.0	20.1
Total 65+	8,513	18.2	19.8	16.4
65-74	5,022	10.8	12.0	9.8
75-89	3,258	7.0	7.4	6.2
90+	233	0.5	0.5	0.4

### Females

	Moray		H&I	Scotland
	Number	%	%	%
All Ages	48,094			
Total 0-15	8,057	16.8	16.1	16.2
Total Working Age	29,550	61.4	60.9	64.1
16-29	7,403	15.4	14.1	17.7
30-49	12,282	25.5	25.1	26.5
50-64	9,865	20.5	21.8	19.9
Total 65+	10,487	21.8	22.9	19.7
65-74	5,543	11.5	12.2	10.2
75-89	4,428	9.2	9.5	8.4
90+	516	1.1	1.2	1.0

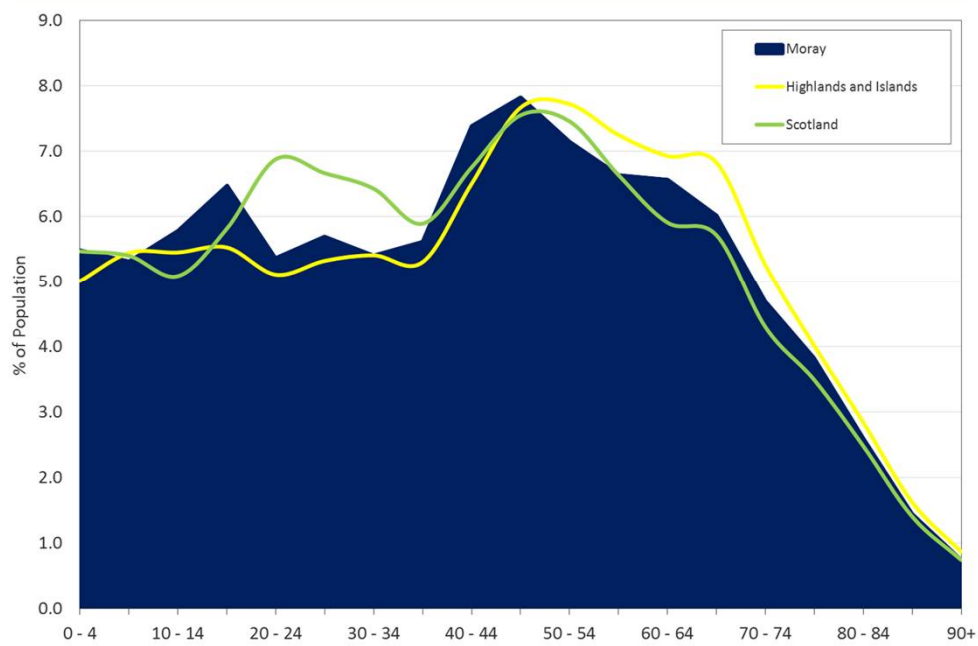
Source: National Records of Scotland

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- In 2014, the age profile of Moray was similar to that of the Highlands and Islands, although slightly younger.
- The military bases at Lossiemouth and Kinloss are likely to be a factor in Moray's relatively young age profile.



## Age Structure by 5-year Age Group, 2014

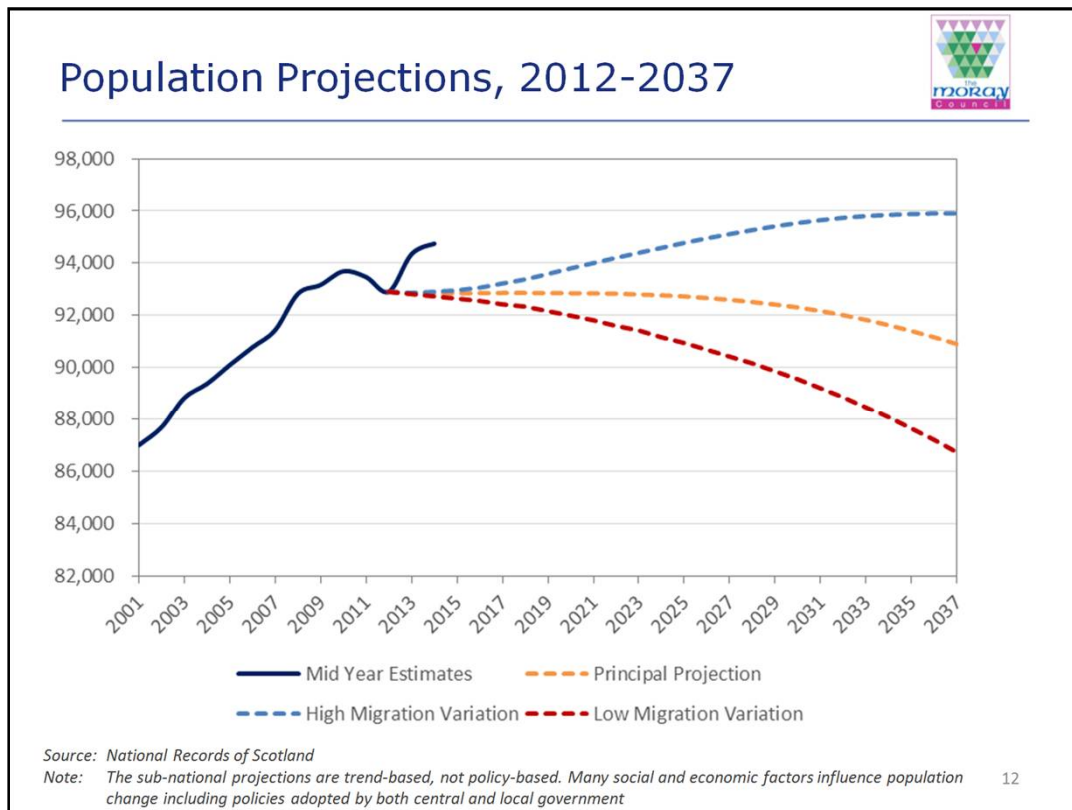


Source: National Records of Scotland

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- The “missing generation” of people aged 16-30 has been less of an issue in Moray than in the Highlands and Islands, and the proportion of the population aged 50 and over was smaller in 2014.

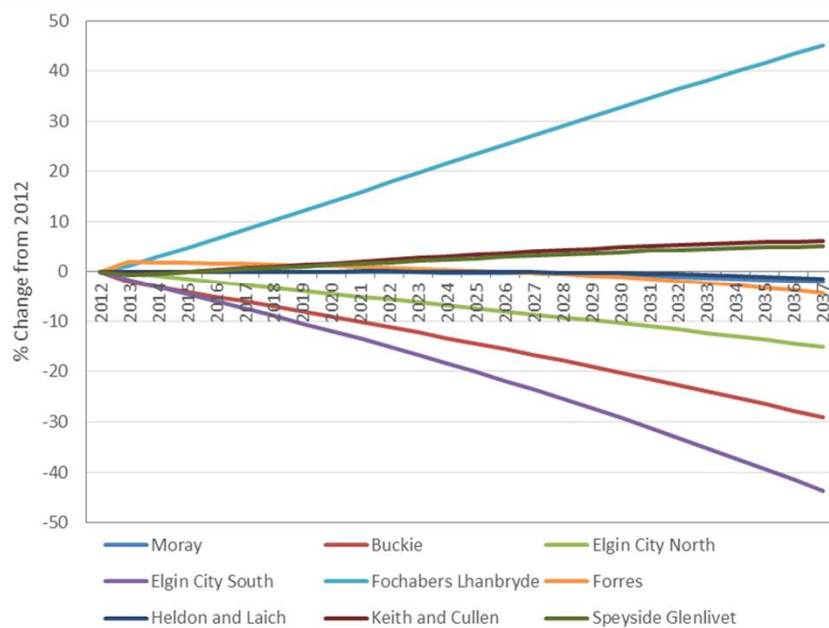




- Population projections are calculated at a national level and allocated the council areas based on trends in population estimates. There is limited accuracy of migration estimates as there is no comprehensive registration system in the UK. Due to changes in the methodology of how the migration element of population change is calculated, population projections for 2012 – 2037 are lower than the 2012-2014 mid year estimates and lower than the 2001-2014 population growth trend.
- Overall, the population of Moray is projected to increase by 3.2% on the High Migration Variation, decrease by 2.2% on the Principal Variation and decrease by 6.7% on the Low Migration Variation.
- 2014 based population projections for council areas will be released in June 2016.



## Population Projections by Sub-Council Area



Source: National Records of Scotland

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- Strong growth (45.1%) is projected for Fochabers Lhanbryde, with growth also projected for Keith and Cullen (6.2%) and Speyside Glenlivet (5.0%).
- Population decline is projected in Elgin City South (-43.7%), Buckie (-29.1%), Elgin City North (-15.1%), Forres (-4.3%), Heldon and Laich (-1.5%) as well as Moray as a whole (-2.2%).
- The number of armed forces over the projection period is assumed to be the same as the five year average from 2008-2012.
- The projections reflect past policy changes and trends in house-building, but they do not incorporate information on planned future policy changes or house-building. These projections are not, therefore, forecasts of what the government expects to happen. The uncertainty in the projections increases as they are taken further into the future and projections for smaller areas are generally less reliable than projections for larger areas. For sub-council projections, particular care should be taken when using the projections after 2026.
- These projections are the results of a one-off research project to produce population and household projections for sub-council areas.



## Population Projections by Age, 2012-2037



	2012			2017			2027			2037		
	Moray		Scotland	Moray		Scotland	Moray		Scotland	Moray		Scotland
	Number (000s)	%	%	Number (000s)	%	%	Number (000s)	%	%	Number (000s)	%	%
All Ages	92.9			92.9			92.6			90.9		
0-15	16.7	17.9	17.2	15.6	16.8	17.0	14.9	16.1	17.2	14.5	15.9	16.7
16-29	15.0	16.2	18.4	15.2	16.3	17.9	13.8	15.0	15.9	12.8	14.1	16.2
30-49	24.4	26.2	27.3	22.4	24.1	25.7	21.2	22.9	25.5	20.7	22.8	24.6
50-64	18.9	20.3	19.7	19.7	21.2	20.5	18.9	20.5	19.1	15.5	17.1	16.9
65-74	10.0	10.7	9.5	10.9	11.7	10.4	11.4	12.3	11.3	12.6	13.8	12.0
75+	8.0	8.6	7.9	9.1	9.8	8.5	12.3	13.3	11.0	14.8	16.3	13.5

Source: National Records of Scotland

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- Overall, the proportion of Moray's population of working age (16-64) is projected to decrease from 62.7% in 2012 to 49.0% in 2037, greater than the projected decrease in Scotland (from 65.4% in 2012 to 57.8% in 2037).
- As people live longer and pensions and savings become inadequate to sustain families' spending, the trend towards increased labour force participation by those aged 65 plus is expected to continue (or accelerate).



## Life Expectancy at Birth



### Life Expectancy at Birth, Males

	2002-2004	2007-2009	2012-2014	
	Years	Years	Years	Rank*
Moray	75.0	76.9	78.6	8
Scotland	73.8	75.4	77.1	-

### Life Expectancy at Birth, Females

	2002-2004	2007-2009	2012-2014	
	Years	Years	Years	Rank*
Moray	80.1	81.3	81.8	15
Scotland	79.0	80.1	81.1	-

Source: National Records of Scotland

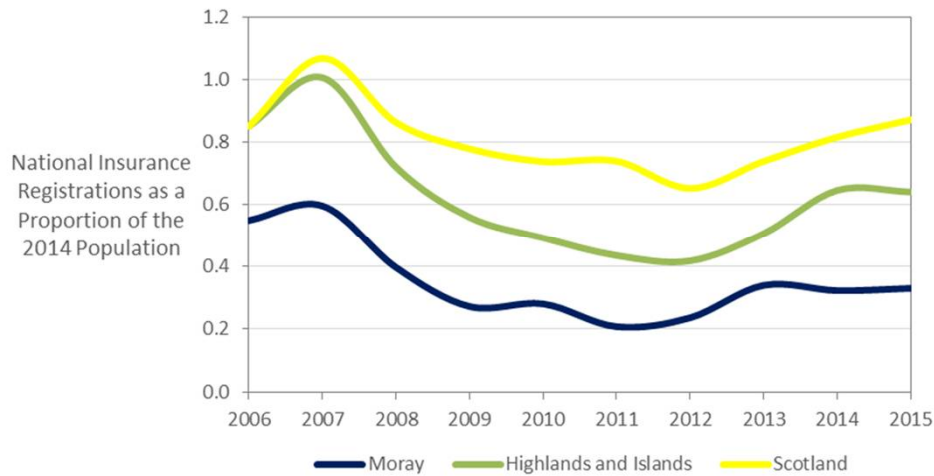
Note: \* Moray is ranked against the 32 Scottish Local Authorities

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- Life expectancy has been consistently improving in recent years in both Moray and Scotland, with Moray ranking favourably against other Local Authorities in Scotland (especially for males).
- Within Scotland, life expectancy is notably lower for people living in deprived areas within cities and towns.



## National Insurance Registrations of Adult Overseas Nationals Entering the UK



Source: Department for Work and Pensions, National Records of Scotland

Note: Highlands and Islands figures are the total of the six main local authority areas that make up the region

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- National Insurance Registrations as a proportion of the population have been lower in Moray than in the Highlands and Islands and Scotland over the 2006 to 2015 period.
- There were 313 registrations in Moray in 2015, down from a peak of 564 in 2007.
- National Insurance Registration figures by area only give an indication of migrants taking up work in the UK. They show where the migrant registered, but the migrants are then free to move elsewhere to seek employment.



## Economic Activity, 2014-15



### Economic Activity, 16-64, October 2014 – September 2015

	Moray		Highlands and Islands	Scotland
	Number	%	%	%
Economic activity rate	43,100	76.8	82.2	77.8
Employment rate	40,800	72.8	78.7	73.1
Who are employees	36,200	64.4	67.4	64.7
Who are self employed	4,600	8.2	10.8	8.0
Unemployment rate	2,300	5.2	4.2	6.1

Source: Annual Population Survey

Note: Figures are rounded to the nearest 100

Figures do not add up to 100% due to rounding

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- The economic activity and employment rates were lower in Moray than in the Highlands and Islands and Scotland overall in 2014/15.
- The proportion of those aged 16-64 who are self-employed was higher in Moray than in Scotland, but lower than in the Highlands and Islands.
- The unemployment rate of Moray residents was lower than in Scotland overall, although higher than the average rate in the Highlands and Islands.



## Economic Inactivity, 2014-15



### Economic Inactivity, 16-64, October 2014 – September 2015

	Moray		Highlands and Islands	Scotland
	Number	%	%	%
% who are economically inactive	13,000	23.2	17.8	22.2
Of those economically inactive				
Who want a job	3,700	28.2	29.9	23.3
Who do not want a job	9,400	71.8	70.1	76.7
Student	3,100	23.6	22.1	26.4
Looking after family/home	2,200	17.2	19.9	20.0
Temporary sick	*	*	2.2	2.6
Long-term sick	4,300	33.0	25.4	26.3
Discouraged	*	*	1.0	0.3
Retired	1,900	14.7	17.3	15.9
Other	1,400	10.7	12.0	8.6

Source: Annual Population Survey

Note: Figures are rounded to the nearest 100

Figures do not add up to 100% due to rounding

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- Economic inactivity was higher in Moray than in the Highlands and Islands and Scotland overall, although the proportion of those not in employment but wanting a job was considerably higher than in Scotland.
- The long-term sick made up a higher proportion of the economically inactive in Moray than the Highlands and Islands and Scotland averages.



## Employment by Sector, 2014



	Moray		Highlands and Islands	Scotland
	Number	%	%	%
Agriculture, Forestry & Fishing	400	1.2	1.9	1.5
Mining, Quarrying & Utilities	400	1.3	2.2	2.9
Manufacturing	6,000	17.5	8.3	7.7
Construction	2,600	7.6	7.1	5.6
Motor Trades	900	2.6	1.9	1.8
Wholesale	900	2.7	2.8	3.0
Retail	4,300	12.4	10.4	10.0
Transport & Storage (inc postal)	1,300	3.8	5.6	4.1
Accommodation & Food Services	2,400	7.0	10.1	7.2
Information & Communication	300	0.7	1.6	2.5
Financial & Insurance	300	1.0	0.8	3.5
Property	300	0.7	1.0	1.1
Professional, Scientific & Technical	1300	3.7	4.6	6.6
Business Administration & Support Services	1,400	3.9	4.7	8.0
Public Administration & Defence	2,000	5.9	6.5	6.0
Education	2,900	8.5	7.7	7.8
Health	5,400	15.7	18.3	16.5
Arts, Entertainment, Recreation & Other Services	1,200	3.6	4.5	4.1
<b>Total Employees</b>	<b>34,600</b>			

Source: Business Register and Employment Survey (BRES)

Note: Figures are rounded to the nearest 100

Figures do not add up to 100% due to rounding

As self employed workers are excluded from BRES data, particular sectors of the Moray economy are under-represented

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- A substantially larger proportion of Moray's workforce was employed in Manufacturing than in the Highlands and Islands and Scotland.
- There was also a greater proportion of the workforce employed in Construction, Retail, and Education in Moray than in Scotland.
- A smaller proportion of the workforce than in Scotland was employed in Mining, Quarrying & Utilities, Transport & Storage, Information & Communication, Financial & Insurance, Professional, Scientific & Technical, and Business Administration & Support Services in Moray.
- Military employment at Lossiemouth and Kinloss is excluded from the above dataset. In 2014, there were around 2,800 military staff at RAF Lossiemouth and in 2012 there were 720 personnel at Kinloss Barracks (former RAF base).
- Following a period of uncertainty about its future, RAF Lossiemouth continues to operate as an air base and is now the only RAF base in Scotland.



## Employees by Public/Private Sector Employees by Full-Time/Part-Time



### Employees by Public/Private Sector

	Moray		Highlands and Islands	Scotland
	Number	%	%	%
Public Sector	8,200	23.7	28.8	23.5
Private Sector	26,400	76.3	71.2	76.5
<b>Total Employees</b>	<b>34,600</b>			

Source: Business Register and Employment Survey

Notes: Figures for the Highlands and Islands are constructed using the six local authorities that make up the area  
Figures are rounded to the nearest 100

### Employees by Full-Time/Part Time

	Moray		Highlands and Islands	Scotland
	Number	%	%	%
Full-Time Employees	22,000	63.7	63.0	67.5
Part-Time Employees	12,500	36.3	37.0	32.5
<b>Total Employees</b>	<b>34,600</b>			

Source: Business Register and Employment Survey, 2014

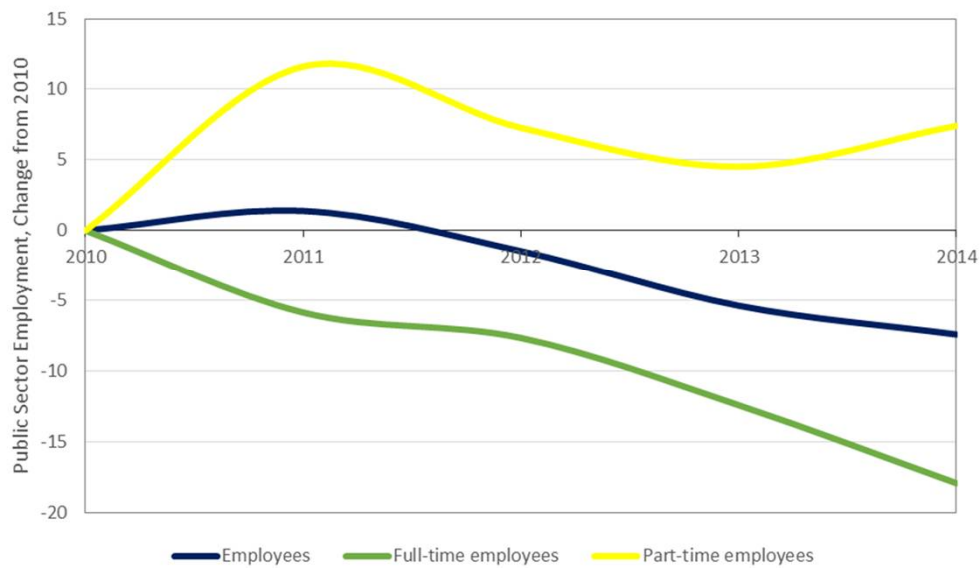
Note: Figures are rounded to the nearest 100

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- The proportion of the workforce employed in the public sector in Moray was slightly higher than the proportion in Scotland, but considerably lower than the proportion in the Highlands and Islands.
- There were 8,200 public sector employees in Moray in 2014, 13.0% fewer than in 2009. In contrast, private sector employment was 7.1% higher, with total employment 1.5% higher.
- The number of full-time employees in Moray increased by 4.7% between 2009 and 2014, whilst the number of part-time employees decreased by 3.7%.
- Military employment at the Lossiemouth and Kinloss bases is excluded from this dataset.
- A greater proportion of the workforce were part-time in Moray than in Scotland – reflecting tourism employment and the seasonality of agricultural production.



## Public Sector Employment in Moray, % Change from 2010



Source: Business Survey and Employment Register

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- The total number of public sector employees in Moray decreased by 7.4% between 2010 and 2014, with full-time employees decreasing by 17.9% and part-time employees increasing by 7.4%.
- In Scotland, the total number of public sector employees decreased by 10.4% over the same period, with decreases of 11.9% and 7.5% in full-time and part-time employees, respectively.



# Growth Sectors



## Number of Registered Enterprises by Growth Sector, 2015

	Moray		Highlands and Islands		Scotland	
	Number	Annual Change	Number	Annual Change	Number	Annual Change
Food and Drink	635	-3.1	5,170	-0.5	17,290	-0.9
Financial and Business Services	345	15.0	2,160	8.8	26,945	7.4
Life Sciences	5	-	45	0.0	520	6.1
Energy	105	16.7	530	10.4	3,905	9.1
Sustainable Tourism	270	0.0	2,275	-0.7	13,960	-0.3
Creative Industries	125	0.0	925	2.2	14,590	5.5
<b>All Growth Sectors</b>	<b>1,480</b>	<b>3.1</b>	<b>11,105</b>	<b>1.9</b>	<b>77,205</b>	<b>3.7</b>

## Turnover of Registered Enterprises by Growth Sector, 2013

	Moray		Highlands and Islands		Scotland	
	£m	Annual Change	£m	Annual Change	£m	Annual Change
Food and Drink	920.5	1.7	2,151.6	8.8	14,334.8	4.0
Financial and Business Services	62.3	43.5	399.7	17.2	-	-
Life Sciences	-	-	14.4	4.3	1,901.3	-5.7
Energy	64.5	-	71.6	43.8	56,701.6	1.8
Sustainable Tourism	66.8	-21.5	787.7	-1.6	6,688.3	4.7
Creative Industries	26.2	-21.6	269.6	-10.7	5,750.2	4.6

Source: Inter Departmental Business Register

Notes: Figures are rounded to the nearest 5. Registered enterprises are those registered for VAT and/or PAYE. An enterprise is counted only once in each local authority area in which it operates. – Indicates where figures are not available  
Highlands and Islands is a total of the six local authority areas that make up the region. Consequently, figures that are not available at local authority level due to disclosure are not included in the Highlands and Islands total.

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- The number of registered enterprises in the energy sector increased by 16.7% between 2014 and 2015, greater than the increases experienced in the Highlands and Islands (10.4%) and Scotland (9.1%).
- Engineering and other businesses that benefit from physical investments in energy infrastructure and production are not included in the Energy sector.
- Small or part-time businesses in tourism and the creative industries are likely to be significantly under-represented in these official statistics.
- The term “Sustainable Tourism” relates to the Tourism sector as a whole.



## Employment by Standard Occupation Classification



### Annual Population Survey, October 2014 – September 2015

% all in employment who are:	Moray		Highlands and Islands	Scotland
	Number	%	%	%
Managers, Directors and Senior Officials	2,600	6.2	8.6	8.7
Professional Occupations	5,800	13.7	15.0	19.7
Associate Professional & Technical Occupations	4,600	10.8	12.1	13.2
Administrative and Secretarial Occupations	3,100	7.3	11.6	11.3
Skilled Trades Occupations	6,900	16.3	15.6	11.1
Caring, Leisure and Other Service Occupations	4,700	10.9	9.2	9.9
Sales and Customer Service Occupations	4,200	10.0	7.5	8.5
Process, Plant and Machine Operatives	4,000	9.4	8.4	6.0
Elementary Occupations	6,400	15.0	12.0	11.3
<b>All People in Employment</b>	<b>42,300</b>			

### Census of Population, 2011

	Moray		Highlands and Islands	Scotland
	Number	%	%	%
Managers, Directors and Senior Officials	3,501	7.6	9.1	8.4
Professional Occupations	5,232	11.4	13.6	16.8
Associate Professional & Technical Occupations	6,754	14.7	11.4	12.6
Administrative and Secretarial Occupations	3,881	8.4	9.3	11.4
Skilled Trades Occupations	7,626	16.6	17.7	12.5
Caring, Leisure and Other Service Occupations	4,603	10.0	10.6	9.7
Sales and Customer Service Occupations	3,719	8.1	7.8	9.3
Process, Plant and Machine Operatives	4,794	10.4	8.6	7.7
Elementary Occupations	5,873	12.8	12.0	11.6
<b>All people aged 16 to 74 in employment</b>	<b>45,983</b>			

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- In both the 2011 Census and the 2014-15 Annual Population Survey, the proportions of those employed in Skilled Trade Occupations, Elementary Occupations, and Process, Plant & Machine Operatives were higher in Moray than in Scotland.
- The proportions of those in Professional, and Administrative & Secretarial occupations was lower in Moray than in Scotland.
- Although the categories in the tables derived from Census and APS statistics will not be a precise match, the reduction of around 25% in Managers, Directors and Senior Officials in Moray from 3,500 to 2,600 is noteworthy, and more marked than in Scotland or the Highlands and Islands.



## Residents by Socio-Economic Classification



### Residents by Socio-Economic Classification, 2011

	Moray		Highlands and Islands	Scotland
	Number	%	%	%
Higher managerial, administrative and professional occupations	4,079	6.0	6.8	8.7
Large employers and higher managerial occupations	1,333	1.9	1.6	1.6
Higher professional occupations	2,746	4.0	5.2	7.0
Lower managerial and professional occupations	13,939	20.4	21.1	20.2
Intermediate occupations	8,285	12.1	11.4	12.9
Small employers and own account workers	6,168	9.0	11.6	7.4
Lower supervisory and technical occupations	7,384	10.8	10.1	8.2
Semi-routine occupations	12,780	18.7	17.4	15.5
Routine occupations	9,873	14.4	13.4	12.9
Never worked	1,339	2.0	1.9	3.1
Long-term unemployed	893	1.3	1.4	1.9
Full-time students	3,670	5.4	4.9	9.1
<b>All people aged 16 to 74</b>	<b>68,410</b>			

Source: 2011 Census of Population

Notes: This table covers all people aged 16-74 (including those economically inactive) and differs from slide 22 which relates to people in employment

Students are counted as resident at their term time address

Those unemployed for over one year are categorised as long-term unemployed

The socio-economic classification of their last main job is used for those that have had paid work and were unemployed at the time of the Census.

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- A lower proportion of people aged 16 to 74 had higher managerial, administrative and professional occupations in Moray than in Scotland in 2011, and a lower proportion were full time students.
- A higher proportion of those aged 16 to 74 had lower supervisory and technical occupations, semi-routine or routine occupations, or were small employers or own account workers in Moray than in Scotland.



## Jobs Density, 2013



### Jobs Density, 2013

	Total Jobs	Jobs Density
Moray	41,000	0.69
Scotland	2,643,000	0.76

*Note: Jobs density is the total jobs divided by the resident population aged 16-64 of that area*

*The number of jobs in an area is composed of jobs held by residents (of any age) and jobs held by workers (of any age) who commute into the area*

**Total jobs** is a workplace-based measure of jobs and comprises:

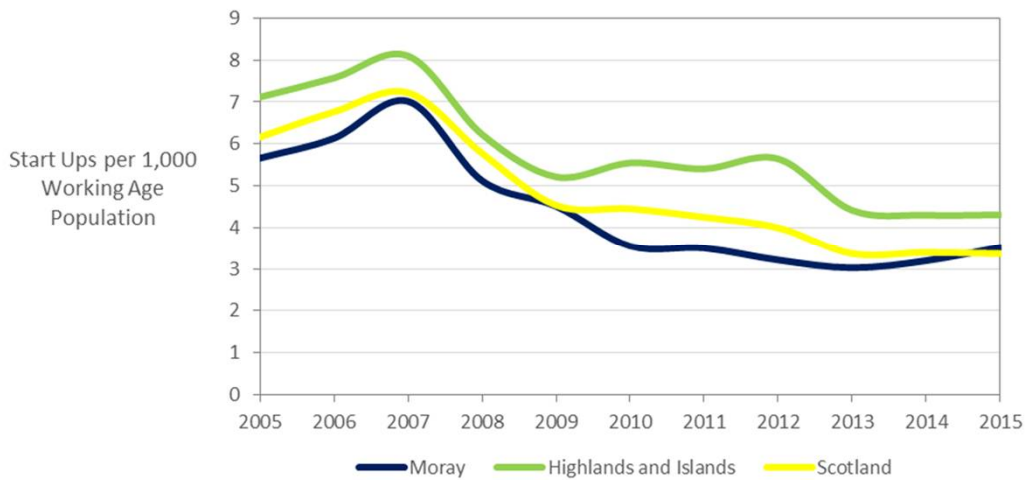
- Employees (from the Business Register and Employment Survey),
- Self-employment jobs (from the Annual Population Survey),
- Government-supported trainees (from DfES and DWP)
- HM Forces (from MoD).

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- Jobs Density in Moray is lower than in Scotland overall due to commuting from within Moray to Highland and Aberdeen/Aberdeenshire.
- 2014 figures to be released mid-April 2016.



## New Business Start-Ups



Source: The Committee of Scottish Bankers, National Records of Scotland

Note: The proportion is per 1,000 resident population aged 16-64 from the Mid-2014 population estimates

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- There were 208 new businesses started in Moray in 2015, down from a peak of 415 in 2007.
- The number of new business starts per 1,000 working age population in Moray was consistently lower than in the Highlands and Islands between 2005 and 2015, and generally lower than in Scotland.
- The number of new starts approximately halved between 2007 and 2015 for Moray, Highland and Scotland.



## Gross Value Added, 2013



	Moray	Scotland
Total Turnover	£3,535m	£239,932m
Gross Value Added at Basic Prices	£1,551m	£94,758m
Gross Value Added per Head	£61,064	£54,646
Gross Wages and Salaries per Head	£16,918	£21,284

Source: Scottish Annual Business Statistics

Note: SABs figures exclude the financial sector, parts of agriculture, and the public sector

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- The total turnover in Moray represented 1.5% of the total turnover in Scotland in 2013 (Moray's population share was 1.8%).
- Gross Value Added per head was higher in Moray than in Scotland (due to proportionally higher employment in Manufacturing in Moray, which has high GVA per head), although Gross Wages and Salaries per head were lower.
- Gross Wages and Salaries per head in Moray were lower than in Scotland due to a proportionally greater share of employment in low paid sectors such as Wholesale, Retail & Repairs, and a lower share of employment in high paid sectors such as Information and Communication, Professional, Scientific & Technical Activities, and Administrative & Support Service Activities.



# Gross Domestic Product, 2014



## Gross Domestic Product Indicators, 2014

	Purchasing Power Standards per inhabitant as percentage of the EU average	Gross Domestic Product (GDP) at current market prices (€m)	GDP per inhabitant (€)
Inverness & Nairn and Moray, Badenoch & Strathspey	106	6,805	33,800
Highlands and Islands	93	13,956	29,900
Scotland	101	172,744	32,300
UK	109	2,254,297	34,900

Source: Eurostat, Gross Domestic Product (GDP) at current market prices by NUTS 3 regions, 2014

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- Although a larger area than Moray, Inverness & Nairn and Moray, Badenoch & Strathspey had favourable purchasing power standards and GDP per inhabitant compared with the Highlands and Islands and Scotland, although not as high as the UK as a whole.



# Unemployment



## Unemployment, March 2015 – February 2016

	Moray		Highlands and Islands	Scotland
	Number	%	%	%
<b>Total</b>				
Highest (Mar 2015)	922	1.6	1.5	2.4
Lowest	677	1.1 (Sept 2015)	1.0 (Sept 2015)	1.7 (Oct 2015)
Average	778	1.3	1.2	2.0
<b>Males</b>				
Highest (Mar 2015)	615	2.1	2.1	3.4
Lowest	464	1.6 (Sept 2015)	1.4 (Sept 2015)	2.4 (Dec 2015)
Average	529	1.8	1.7	2.8
<b>Females</b>				
Highest (Mar 2015)	307	1.0	0.9	1.5
Lowest	213	0.7 (Dec 2015)	0.6 (Oct 2015)	1.1 (Dec 2015)
Average	249	0.8	0.7	1.3

Source: Jobseekers Allowance, National Records for Scotland

Note: The rate is the proportion of the population aged 16-64

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- The unemployment rate in Moray for males and females was consistently below the rate in Scotland between March 2015 and February 2016, and slightly higher than the rate in the Highlands and Islands.
- In Moray, the highest unemployment rate was in March 2015 and the lowest in September 2015.
- These rates of unemployment are significantly lower than those shown on Slide 16 from the Annual Population Survey as they only relate to people claiming Jobseekers Allowance.



# Unemployment by Area



## Unemployment by Ward, February 2016

	Number	%
Buckie	154	2.8
Elgin City North	93	1.4
Elgin City South	110	1.9
Fochabers Lhanbryde	59	0.7
Forres	195	2.0
Heldon and Laich	74	0.7
Keith and Cullen	90	1.4
Speyside Glenlivet	57	1.0
<b>Moray</b>	<b>832</b>	<b>1.4</b>
<b>Scotland</b>	<b>63,543</b>	<b>1.8</b>

Source: Jobseekers Allowance, National Records for Scotland  
 Note: The rate is the proportion of the population aged 16-64

30

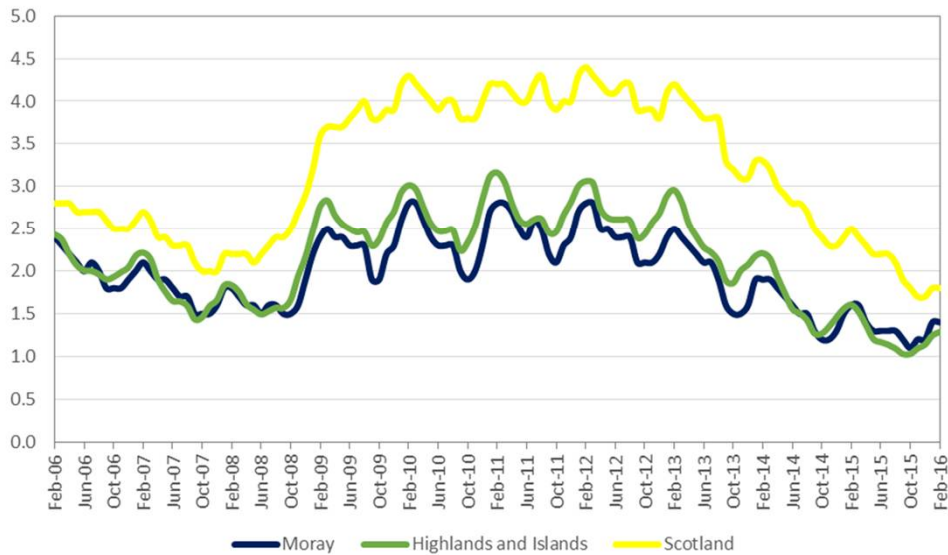
- The unemployment rates in Elgin City South, Buckie and Forres were higher than the Moray average in February 2016, and with the rates in Buckie and Forres also higher than the Scottish rate.



# Unemployment Rate, 2006-2016



Unemployment Rate, February 2006 – February 2016



Source: Jobseekers Allowance, National Records for Scotland

Note: The rate is the proportion of the population aged 16-64

31

- The unemployment rate in Moray has followed a similar trend to that of the Highlands and Islands over the ten year period, although with a slightly lower average unemployment rate (2.0% compared to 2.1% in the Highlands and Islands).



# Unemployment by Age and Duration



## Unemployment By Age and Duration, February 2016

	Moray		Scotland
	Number	%	%
<b>By age of claimant</b>			
Aged 16-24	155	1.6	1.7
Aged 25-49	445	1.5	2.0
Aged 50-64	225	1.2	1.5
<b>By duration of claim</b>			
Up to 6 months	565	1.0	1.1
Over 6 months and up to a year	115	0.2	0.3
Over 1 year	150	0.3	0.5

Source: Jobseekers Allowance, National Records for Scotland

Notes: For age, the rate is the proportion of the age group unemployed

For duration, the rate is the proportion of the population aged 16-64

32

- Youth unemployment in Moray (1.6%) was slightly lower than the rate in Scotland as a whole (1.7%).
- A smaller proportion of the working age population in Moray (0.3%) were long term unemployed (claiming Jobseekers Allowance for over one year) than in Scotland as a whole (0.5%).
- Other people in Moray not eligible for Jobseekers Allowance will also have been unemployed for a lengthy period.



## Earnings and Hours by Residence, 2015



### Median Earnings and Hours

	Moray £	Scotland £	Great Britain £
<b>Median Gross Annual Pay</b>			
Full-time workers	26,064	27,732	27,732
Male full-time workers	30,537	29,966	30,000
Female full-time workers	22,272	24,440	24,207
<b>Median Gross Hourly Pay</b>			
Full-time workers	12.18	13.45	13.42
Male full-time workers	12.47	13.97	14.04
Female full-time workers	10.96	12.74	12.58
<b>Median Weekly Hours Worked</b>			
Full-time workers	38.0	37.5	37.5
Male full-time workers	39.4	38.5	38.9
Female full-time workers	36.9	37.0	37.4

Source: Annual Survey of Hours and Earnings (ASHE)

Note: ASHE figures do not cover the self-employed

### Mean Earnings and Hours

	Moray £	Scotland £	Great Britain £
<b>Mean Gross Annual Pay</b>			
Full-time workers	29,912	32,472	33,839
Male full-time workers	32,879	35,601	37,342
Female full-time workers	25,323	28,173	28,437
<b>Mean Gross Hourly Pay</b>			
Full-time workers	14.06	15.66	16.10
Male full-time workers	14.85	16.40	17.02
Female full-time workers	12.76	14.56	14.61
<b>Mean Weekly Hours Worked</b>			
Full-time workers	39.8	38.8	39.1
Male full-time workers	41.5	39.9	40.2
Female full-time workers	37.3	37.2	37.5

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- Median and mean gross full-time weekly and hourly pay were lower in Moray than in Scotland and Great Britain overall on almost all measures. Median gross annual pay in Moray was 94% of the Scotland and British averages.
- Median and mean full time hours worked were slightly higher in Moray than in Scotland and Great Britain for males, and generally lower for females.
- Moray's industrial and occupational structures contribute to the low earnings in the area (compared to Scotland as a whole) as well as its rural nature and the fact that the relatively highly paid military jobs in the area are not included in the data.
- Due to small sample sizes for Moray, not all of the figures in the tables above will be mutually logical.
- The introduction of the Living Wage will tend to raise mean earnings rather than median earnings.



## Full-Time Earnings in Scotland by Sector, 2015



	Median Full-Time Annual Income			Mean Full-Time Annual Income		
	Scotland £	UK £	Scotland % of UK	Scotland £	UK £	Scotland % of UK
<b>All Industries and Services</b>	27,716	27,647	<b>100.2</b>	32,208	33,691	<b>95.6</b>
<b>All Index of Production Industries</b>	30,926	29,195	<b>105.9</b>	35,863	33,850	<b>105.9</b>
<b>All Manufacturing</b>	28,685	28,377	<b>101.1</b>	32,695	32,845	<b>99.5</b>
<b>All Service Industries</b>	27,094	27,278	<b>99.3</b>	31,542	33,724	<b>93.5</b>
Agriculture, Forestry and Fishing	24,395	21,577	<b>113.1</b>	29,062	24,663	<b>117.8</b>
Mining and Quarrying	44,860	40,657	<b>110.3</b>	55,684	50,387	<b>110.5</b>
Manufacturing	28,685	28,377	<b>101.1</b>	32,695	32,845	<b>99.5</b>
Electricity, Gas, Steam and Air Conditioning Supply	38,109	39,111	<b>97.4</b>	41,577	44,163	<b>94.1</b>
Water Supply; Sewerage, Waste Management & Remediation Activities	28,985	29,869	<b>97.0</b>	33,150	34,091	<b>97.2</b>
Construction	28,147	29,486	<b>95.5</b>	33,733	33,580	<b>100.5</b>
Wholesale and Retail Trade; Repair of Motor Vehicles & Motorcycles	20,882	22,178	<b>94.2</b>	25,924	28,655	<b>90.5</b>
Transportation and Storage	27,868	28,358	<b>98.3</b>	33,430	33,096	<b>101.0</b>
Accommodation and Food Service Activities	16,166	17,500	<b>92.4</b>	19,231	20,960	<b>91.8</b>
Information and Communication	31,795	36,844	<b>86.3</b>	37,828	44,405	<b>85.2</b>
Financial and Insurance Activities	35,275	38,286	<b>92.1</b>	45,067	60,386	<b>74.6</b>
Real Estate Activities	25,316	26,590	<b>95.2</b>	32,625	34,455	<b>94.7</b>
Professional, Scientific and Technical Activities	31,420	33,666	<b>93.3</b>	39,020	42,333	<b>92.2</b>
Administrative and Support Service Activities	22,375	23,261	<b>96.2</b>	24,862	28,169	<b>88.3</b>
Public Administration and Defence; Compulsory Social Security	31,048	25,772	<b>120.5</b>	32,274	32,567	<b>99.1</b>
Education	30,980	29,684	<b>104.4</b>	32,003	31,629	<b>101.2</b>
Human Health and Social Work Activities	25,977	24,856	<b>104.5</b>	30,890	29,785	<b>103.7</b>
Arts, Entertainment And Recreation	20,000	22,000	<b>90.9</b>	24,223	30,287	<b>80.0</b>
Other Service Activities	21,714	24,225	<b>89.6</b>	26,442	28,916	<b>91.4</b>
Activities of Households as Employers	16,779	19,915	<b>84.3</b>	17,853	22,974	<b>77.7</b>

Source: Annual Survey of Hours and Earnings

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- Earnings data from ASHE by sector are not available at local authority area level.
- Median and mean full-time annual earnings were lower in Scotland than in the UK in many sectors, most notably in Information & Communication, Financial & Insurance Activities, and Other Service Activities.
- Median full-time annual income was significantly higher in Scotland than in the UK for employees in Agriculture, Forestry & Fishing, Mining & Quarrying, and Public Administration and Defence.



## Method of Travel to Work or Study, 2011



	Moray		Highlands and Islands	Scotland
	Number	%	%	%
Driving a car or van	25,958	42.8	42.5	40.9
On foot	12,011	19.8	17.5	18.5
Work or study mainly at or from home	7,334	12.1	14.8	11.3
Passenger in a car or van	5,700	9.4	9.7	9.0
Bus minibus or coach	4,750	7.8	9.7	13.4
Other	1,580	2.6	1.9	0.9
Bicycle	1,394	2.3	2.0	1.3
Train	1,129	1.9	1.2	3.5
Taxi or minicab	551	0.9	0.5	0.7
Motorcycle, scooter or moped	162	0.3	0.2	0.2
Underground metro light rail or tram	18	0.0	0.0	0.3

Source: 2011 Census

Note: Rates are a proportion of all people aged 4 and over studying or aged 16 to 74 in employment

35

- A higher proportion studying or in employment travelled to work or study as a driver or as a passenger in a car or van, on foot or by bicycle in Moray than in Scotland, and a smaller proportion travelled by public transport.
- A greater proportion of those aged 16-74 studying or in in employment worked mainly at or from home in Moray than in Scotland.



## Distance of Travel to Work or Study, 2011



	Moray		Highlands and Islands	Scotland
	Number	%	%	%
Work or study mainly at or from home	7,334	12.1	14.8	11.3
Less than 2km	15,900	26.2	24.4	21.9
2km to less than 5km	7,514	12.4	15.7	19.6
5km to less than 10km	7,719	12.7	10.0	15.1
10km to less than 20km	7,175	11.8	11.5	12.6
20km to less than 30km	3,775	6.2	5.6	5.3
30km to less than 40km	1,085	1.8	2.2	2.4
40km to less than 60km	954	1.6	1.7	1.9
60km and over	2,359	3.9	4.1	1.7
Other*	6,772	11.2	9.9	8.2

Source: 2011 Census

Note: \* Includes no fixed place of work or study, working on an offshore installation and working or studying outside the UK

36

- A higher proportion of those studying or in employment worked mainly at or from home or travelled less than 2km in Moray than in Scotland, and a higher proportion travelled 60km or recorded "other".
- In 2012, 2,675 Moray residents worked offshore for at least part of the year.



## Qualifications of the Resident Population, 2011



### Qualifications of the Resident Population, 2011

	Moray		Highlands and Islands	Scotland
	Number	%	%	%
<b>All people aged 16 and over</b>	<b>76,251</b>			
No qualifications	20,343	26.7	26.3	26.8
Level 1 qualifications	20,088	26.3	24.4	23.1
Level 2 qualifications	10,987	14.4	14.4	14.3
Level 3 qualifications	7,520	9.9	9.2	9.7
Level 4 qualifications and above	17,313	22.7	25.8	26.1

Source: 2011 Census of Population

#### Qualification Levels

Level 1: O Grade, Standard Grade, Access 3 Cluster, Intermediate 1 or 2, GCSE, Certificate of Secondary Education, Senior Certificate or equivalent;

Level 2: Scottish Certificate of Education Higher Grade, Higher, Advanced Higher, CSYS, A Level, AS Level, Advanced Senior Certificate or equivalent;

Level 3: HNC, HND, Scottish Vocational Qualification (SVQ) level 4 or equivalent;

Level 4: Scottish Vocational Qualification (SVQ) level 5, Degree, Postgraduate qualifications, Masters, PhD, or equivalent

37

- A higher proportion of all people aged 16 and over just had a Level 1 qualification in Moray than in the Highlands and Islands and Scotland in 2011.
- A lower proportion of people living in Moray had a Level 4 qualification or above than in the Highlands and Islands and Scotland.
- The table includes retired people, although many with qualifications aged 65 or over will be available for full or part-time work.



## Qualifications of the Resident Population, 2014



### Qualifications of the Resident Population aged 16-64, 2014

	Moray		Highlands and Islands	Scotland
	Number	%	%	%
% with no qualifications (NVQ)	4,800	8.6	6.1	9.4
% with NVQ1+	48,200	86.7	87.8	84.4
% with NVQ2+	41,800	75.2	78.6	74.8
% with NVQ3+	29,500	53.0	59.6	60.2
% with NVQ4+	17,800	32.0	36.9	41.0
% with other qualifications (NVQ)	2,600	4.7	6.1	6.2

Source: Annual Population Survey

#### Qualification Levels

Level 1: O Grade, Standard Grade, Access 3 Cluster, Intermediate 1 or 2, GCSE, Certificate of Secondary Education, Senior Certificate or equivalent;  
 Level 2: Scottish Certificate of Education Higher Grade, Higher, Advanced Higher, CSYS, A Level, AS Level, Advanced Senior Certificate or equivalent;  
 Level 3: HNC, HND, Scottish Vocational Qualification (SVQ) level 4 or equivalent;  
 Level 4: Scottish Vocational Qualification (SVQ) level 5, Degree, Postgraduate qualifications, Masters, PhD, or equivalent

38

- A higher proportion of those aged 16-64 had at least a NVQ level 1 qualification in Moray than in Scotland in 2014, but a significantly lower proportion had a Level 4 qualification or higher than in the Highlands and Islands or Scotland – 32% in Moray compared with 41% in Scotland.



## School Leaver Attainment



% of school leavers by highest SCQF level at which one or more passes were achieved

	2013/14	2012/13	2011/12
<b>No passes at SCQF 3 or better</b>			
Moray	1.5	1.8	2.2
Scotland	1.7	1.5	1.8
<b>SCQF level 3 (National 3)</b>			
Moray	0.5	1.2	1.3
Scotland	2.0	2.2	2.4
<b>SCQF level 4 (National 4)</b>			
Moray	9.3	11.4	12.9
Scotland	11.9	13.6	14.3
<b>SCQF Level 5 (National 5)</b>			
Moray	30.0	29.2	30.9
Scotland	25.7	26.9	25.8
<b>SCQF level 6 (Higher)</b>			
Moray	39.4	39.5	39.4
Scotland	40.0	38.1	38.2
<b>SCQF level 7 (Advanced Higher)</b>			
Moray	19.3	16.9	13.3
Scotland	18.7	17.6	17.6

Source: Scottish Government

39

- A greater proportion of school leavers in Moray achieved a pass at SCQF Level 7 than school leavers in Scotland in 2013/14, with the proportion of those achieving a pass at SCQF Level 7 having improved significantly from 2011/12.



## Destination of School Leavers



### Destination of School Leavers, 2013/14

	Moray		Highlands and Islands	Scotland
	Number	%	%	%
All Leavers	949			
Positive Destination	882	92.9	94.0	91.7
Higher Education	359	37.8	36.2	38.7
Further Education	249	26.2	21.8	24.4
Training	13	1.4	2.0	2.5
Employment	249	26.2	32.4	24.9
Voluntary Work	*	*	0.7	0.4
Activity Agreement	*	*	0.9	0.7
Unemployed Seeking Employment	44	4.6	4.2	6.5
Unemployed Not Seeking Employment	21	2.2	1.5	1.5
Unknown	*	*	0.3	0.3

Source: Scottish Government

Note: Figures are unavailable

40

- 92.9% of school leavers in Moray went on to positive destinations in 2013/14, higher than the proportion in Scotland (91.7%).
- A greater proportion of school leavers in Moray went into further education or employment compared to Scotland, with comparatively more going into further education rather than employment in the Highlands and Islands.



## Further Education Enrolments



### Number of Students by Superclass Summary, Moray College

	2012/13	2013/14	2014/15
Health Care / Medicine /Health and Safety	1,078	2,002	1,957
Information Technology and Information	475	398	626
Construction and Property (Built Environment)	485	455	427
Family Care / Personal Development / Personal Care and Appearance	395	359	394
Area Studies/ Cultural Studies / Languages/Literature	200	182	203
Arts and Crafts	329	239	168
Engineering	123	134	155
Sports, Games and Recreation	235	112	122
Catering / Food / Leisure Services / Tourism	256	190	118
Sciences and Mathematics	72	78	115
Politics / Economics / Law / Social Sciences	63	77	94
Authorship / Photography / Publishing / Media	134	74	83
Agriculture, Horticulture and Animal Care	81	52	55
Business/Management/Office Studies	70	60	52
Performing Arts	13	13	15
Humanities (History / Archaeology/ Religious Studies / Philosophy)	42	-	-
<b>Total Number of Students</b>	<b>4,051</b>	<b>4,425</b>	<b>4,584</b>

Source: Scottish Funding Council

41

- The total number of students at Moray College increased by 13.2% between 2012/13 and 2014/14, with the largest increases in Health Care/Medicine/Health and Safety, Sciences & Mathematics, Politics/Economics/Law/Social Sciences, Information Technology & Information and Engineering.
- The decreases in student numbers were in Catering/Food/Leisure Services/Tourism, Arts & Crafts, and Sports, Games & Recreation.



## Number of Students by Student Origin



### Number of Students by Student's Home Area prior to Study, Moray College

	2012/13	2013/14	2014/15
Moray	3,376	3,837	4,016
Rest of Highlands and Islands	323	318	250
Rest of Scotland	251	273	233
England	6	0	5
EU	5	0	0
<b>Total</b>	<b>3,961</b>	<b>4,428</b>	<b>4,504</b>

Source: Scottish Funding Council

Notes: Figures are not consistent with the superclass summary due to different recording measures  
Student below 5 are rounded to the nearest 5

42

- The number of students at Moray College from Moray increased by 19.0% between 2012/2013 and 2014/2015, with the number of students from the rest of the Highlands and Islands and the rest of Scotland decreasing by 22.6% and 7.2% respectively.



## Higher Education Statistics, Moray College



### Number of FTEs in Higher Education by Subject Network, Moray College

	Moray College UHI	
	2014/15	% Change 2013/14 - 2014/15
Applied Life Studies	251	-8.6
Business, Management and Leisure	184	-11.4
Creative and Cultural Industries	81	-3.7
Energy and Technology	129	-1.1
Humanities and Gaelic	119	18.3
Science, Environment & Rural Resource Management	101	16.4
<b>Total</b>	<b>865</b>	<b>-2.2</b>

### Number of Students in Higher Education by Subject Network, Moray College

	Moray College UHI	
	2014/15	% Change 2013/14 - 2014/15
Applied Life Studies	334	-11.4
Business, Management and Leisure	213	-9.4
Creative and Cultural Industries	96	-3.0
Energy and Technology	187	1.1
Humanities and Gaelic	173	24.5
Science, Environment & Rural Resource Management	121	21.0
<b>Total</b>	<b>1,124</b>	<b>-1.0</b>

Source: UHI Student Records

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- Provisional figures show an increase of around 9% in FTE student numbers in Moray College UHI between 2014/15 and 2015/16.
- Around half of the total number of FTEs relate to Applied Life Studies or Business, Management and Leisure.



# Higher Education Statistics, UHI



## Total Students in Higher Education, UHI, 2013/14 and 2014/15

	University of the Highlands and Islands		Scotland	
	2014/15	% change 2013/14 to 2014/15	2014/15	% change 2013/14 to 2014/15
Total Students in Higher Education	7,850	5.2	218,400	1.3

## Mode of Study, University of the Highlands and Islands, 2014/15

	University of the Highlands and Islands			Scotland		
	Full-time	Part-time	All modes of study	Full-time	Part-time	All modes of study
Postgraduate	100	335	440	33,435	22,765	56,200
Undergraduate	5,020	2,395	7,415	141,410	34,965	176,370

## Students by Domicile, University of the Highlands and Islands, 2014/2015

	University of the Highlands and Islands				Scotland			
	Undergraduate		Postgraduate		Undergraduate		Postgraduate	
	Number	%	Number	%	Number	%	Number	%
United Kingdom	7,205	97.2	405	92.0	149,210	84.6	33,330	59.3
Other European Union	125	1.7	5	1.1	14,300	8.1	6,505	11.6
Non-European Union	85	1.1	25	5.7	12,860	7.3	16,345	29.1
<b>Total Students</b>	7,415		440		176,370		56,200	

Source: Higher Education Statistics Authority (HESA)

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- The numbers of students in higher education at the University of the Highlands and Islands increased by 5.2% between 2013/2014 and 2014/15.



## Area Residents in Higher Education



### Scottish domiciled students in higher education at Scottish universities and colleges, 2008/09 to 2014/15

	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	% change since 2013-14	% change since 2008-09
Moray	3,545	3,490	3,335	3,370	3,205	3,245	3,240	-0.2	-8.6
Scotland	212,010	215,595	214,315	205,130	201,580	202,190	201,595	-0.3	-4.9

### Qualifiers from higher education courses at Scottish institutions, 2010/11 to 2014/15

	2010-11	2011-12	2012-13	2013-14	2014-15	% change since 2013-14	% change since 2010-11
Moray	960	955	1,035	1,070	1,040	-2.8	8.3
Scotland	64,715	65,045	66,640	68,530	67,185	-2.0	3.8

### Qualifications obtained from Scottish domiciled qualifiers from Higher Education courses at Scottish institutions, 2014/15

	Level of Qualification obtained					
	All Levels	Postgraduate		First Degree	Sub-degree	
		Research Postgraduate	Taught Postgraduate		HNC/HND	Other Sub-degree
Moray	1,040	10	110	400	360	160
Scotland	67,185	1,200	8,925	26,305	19,715	11,040

Sources: Higher Education Statistics Agency (HESA) and Scottish Funding Council (SFC)

Notes: The above tables do not include Scottish domiciled students at UK institutions outside Scotland and do not represent rates of participation in Scottish local authorities.

HNC, HND and other sub-degree courses are regarded as Higher Education in these tables

Figures are rounded to the nearest 5

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- The total number of Scottish domiciled students from Moray in higher education at Scottish Higher Education Institutes (HEIs) and colleges decreased by 8.6% between 2008/09 and 2014/15, higher than the decrease in Scotland (-4.9%) over the same period.
- The number of qualifiers resident in Moray from higher education courses at Scottish institutions in 2014/2015 was 8.3% higher than in 2010/11.
- Half of the qualifications obtained in Moray were at the sub-degree level, compared to 45.8% in Scotland.



## House Prices and Sales



### House Prices and Sales, 2015 and Annual Change

	Moray		Scotland	
	2015	Annual Change (%)	2015	Annual Change (%)
Mean House Price	£152,668	3.4	£169,402	3.6
Volume of Residential Property Sales	1,700	-4.0	97,701	4.5

Source: Registers of Scotland

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- Average house prices in Moray were 90.1% of the average house prices in Scotland in 2015, and increased at a slightly slower rate between 2014 and 2015.



## Tenure, 2011



	Moray		Highlands and Islands	Scotland
	Number	%	%	%
All households	40,062			
<b>Owned</b>	<b>26,409</b>	<b>65.9</b>	<b>67.0</b>	<b>62.0</b>
Owned: Owned outright	13,970	34.9	37.4	27.8
Owned: Owned with a mortgage or loan	12,344	30.8	29.0	33.7
Owned: Shared ownership (part owned and part rented)	95	0.2	0.6	0.4
<b>Rented</b>	<b>12,809</b>	<b>32.0</b>	<b>30.6</b>	<b>36.7</b>
Rented: Council (Local authority)	5,662	14.1	10.5	13.2
Rented: Other social rented	2,091	5.2	8.6	11.1
Rented: Private landlord or letting agency	3,843	9.6	9.5	11.1
Rented: Other	1,213	3.0	2.0	1.3
<b>Living rent free</b>	<b>844</b>	<b>2.1</b>	<b>2.4</b>	<b>1.3</b>

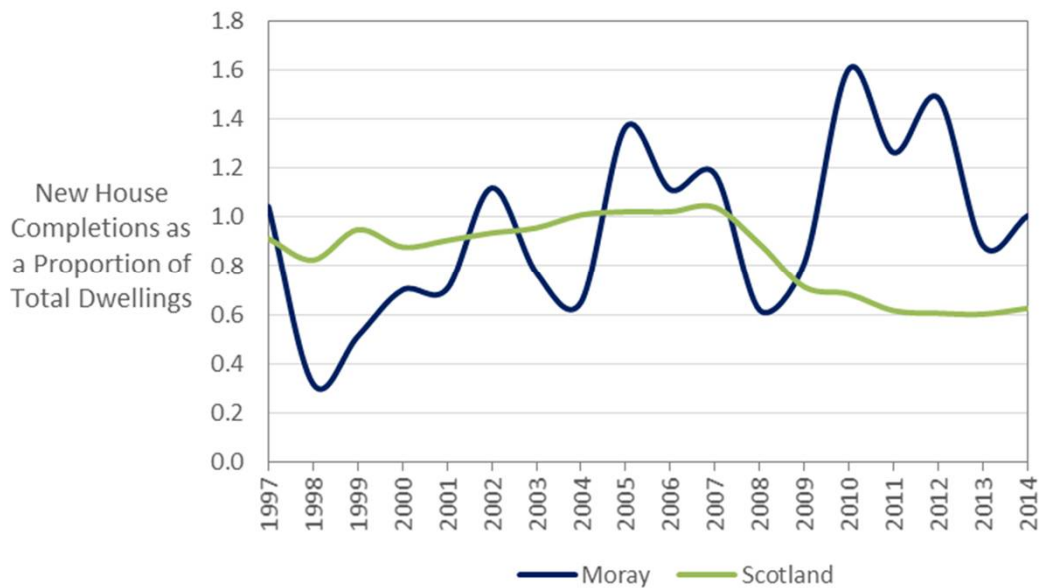
Source: 2011 Census

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- The proportion of households owned in Moray is greater than in Scotland, as well as the proportion of homes that are owned outright.



## New House Completions, 1997 - 2014



Source: Scottish Government

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- There were 425 houses completed in Moray in 2014, an increase of 54.5% from the 2004 level of 275. Almost ninety of those houses were built by the local authority.
- New House Completions as a proportion of total dwellings has been higher in Moray than in Scotland for nine of the past ten years.



## Health Statistics



	Moray	Scotland
Emergency hospital admissions – all ages – rate per 100,000 population: 2012	7,403	10,194
Percentage vaccinated against MMR by 5 years of age: 2013	95.8	97.1
Alcohol related hospital discharge – rate per 100,000 population: 2012-2013	420	693
Coronary heart disease admissions – all ages – rate per 100,000: 2012	455	489
The average number of registered patients per contracted GP: 2012	1,169	1,295
Lung cancer registrations – rate per 100,000 population: 2005-2009	298	457
Respiratory disease admissions – all ages – rate per 100,000 population: 2012	1,277	1,726
Number of mothers who reported that they smoke at ante-natal booking visit – ratio, 2011-2013	19.6	19.0
Number of individuals reported to the SDMD* – all drugs, rate per 100,000 population: 2009	93	231

Source: Scottish Neighbourhood Statistics

Note: \*Scottish Drug Misuse Database

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- The population of Moray has been healthier than that of Scotland on almost all key indicators.
- However, the percentage of children vaccinated against MMR by 5 years of age was lower in Moray than in Scotland and the number of expecting mothers reporting that they smoke was slightly higher in Moray than in Scotland.



## Scottish Index of Multiple Deprivation



### Datazones in the 20% most deprived datazones in Scotland

	Number of datazones in the 20% most deprived datazones in Scotland	% of population living in the 20% most deprived datazones in Scotland
SIMD 2004	0	0.0
SIMD 2006	2	2.6
SIMD 2009	3	2.4
SIMD 2012	2	1.2

Source: Scottish Index of Multiple Deprivation

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- A small proportion of the Moray population lived in a datazone that was in the 20% most deprived datazones in Scotland over the past four SIMD studies.
- Only one datazone was in the 15% most deprived datazones in any of the four years (Elgin South Lesmurdie in SIMD 2009).



## Recorded Crime Statistics



### Recorded Crimes, 2014/15

	Number		Rate per 10,000 population		Index of national rate per 10,000 population	
	Moray	Scotland	Moray	Scotland	Moray	Scotland
Non-sexual crimes of violence	61	6,357	6	12	54	100
Sexual crimes	183	9,557	19	18	108	100
Crimes of dishonesty	1172	126,857	124	237	52	100
Fire-raising, vandalism, etc	662	52,091	70	97	72	100
Other crimes	483	61,488	51	115	44	100
<b>Total crimes</b>	<b>2,561</b>	<b>256,350</b>	<b>270</b>	<b>479</b>	<b>56</b>	<b>100</b>

Source: Scottish Government, Recorded Crime in Scotland, 2014-15

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- With the exception of sexual crimes, recorded crimes in Moray were lower than in Scotland overall in 2014/15.



### Moray's Climate (1971-2000 Averages)

	Kinloss	UK
Average Monthly Maximum Temperature (°C)	12.2	12.1
Average Monthly Minimum Temperature (°C)	5.1	5.1
Annual Days of Air Frost	53.5	55.6
Annual Sunshine (hours)	1,261.4	1,339.7
Annual Rainfall (mm)	624.4	1,125.0
Annual Days of Rainfall 1mm or more	127.6	154.4

Source: Met Office

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- Kinloss, on the Moray Firth coast, has a very good climate compared with the UK average. Low rainfall is a particular feature. Kinloss' weather pattern will broadly reflect that of the communities in which the bulk of Moray's population live.
- As elsewhere in the UK, summer and winter temperatures have been rising in recent years.
- Lying snow along the coastal strip has been unusual over the past 10 years.
- The mountainous areas to the south of Moray have a wetter and generally cooler climate. One of Scotland's five skiing areas is at the Lecht on the Moray/Aberdeenshire border.
- Up-to-date climate information on other weather stations throughout Moray can be purchased from the Met Office.



## Adults Perception of their Neighbourhood



### Percentage of people saying a problem is very/fairly common in their neighbourhood, 2014

	Moray	Scotland
Noisy neighbourhoods/loud parties	6	11
Drug misuse or dealing	9	11
Rubbish or litter lying around	26	27
Groups or individuals intimidating or harassing others	6	6
Vandalism, graffiti or other deliberate damage to property	5	8

Source: Scottish Household Survey

### Rating of Local Authority Area as a Place to Live, 2014

	Very good	Fairly good	Fairly poor	Very poor	No opinion
Moray	96.9	62.6	34.2	1.5	1.4
Scotland	94.4	55.8	38.5	3.6	1.7

Source: Scottish Household Survey

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- The proportion of the population rating Moray as a very/fairly good place to live has consistently been above the Scottish rate in the Scottish Household Survey.



## Quality of Life



### Miscellaneous Indicators from the Halifax Quality of Life Survey

	Moray	UK	Source
Number of rooms in house	4.7	5.5	Housing Conditions Survey 2009/11
% of houses with central heating and sole use of bathroom	91.8	96.0	Housing Conditions Survey 2009/11
Traffic flows per square km	326	9,268	Department of Transport, 2013
Burglary rate per 10,000 population	22.3	29.6	British Crime Survey 2011/12
Population density per square km	42	266	ONS, 2013
% in good or fairly good health	96.1	94.6	2011 Census
Number of pupils in primary school class	21.6	26.7	Department for Education, 2013
Households with a good level of broadband access	73.6%	87.0%	Point Topic June 2014

Source: Halifax Quality of Life Survey

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- On average, houses in Moray have less rooms and were less likely to have a good level of broadband access or central heating and sole use of a bathroom than houses in the UK.
- The population density in Moray was significantly lower than in the UK as a whole, with traffic flows per km<sup>2</sup> also significantly lower.
- The burglary rate per 10,000 population in Moray was lower than in the UK overall, with the number of pupils per primary class also lower.