

AREA PROFILE

Land & Population

Moray is the 8th largest Council area in Scotland, covering an area of 2238 square kilometres, from the Cairngorm Mountains in the south to the coast of the Moray Firth in the north. However, in terms of its population, it ranks 25th out of 32 with a population of just 86,870. The area is mostly rural comprising 70% open countryside and a further 25% woodland. The average population density is low at just 39 people per square kilometre. However, approximately 57% of the population live in the 5 main towns of Elgin, Forres, Buckie, Lossiemouth and Keith, where the population density is approximately 2500 people per square kilometre.

Compared to the rest of Scotland, Moray has a much smaller proportion of its population living in urban areas – 24% compared to 70% for Scotland as a whole. Most of Moray residents live within a 60-minute drive of a settlement of at least 10,000 population, with less than 1% living in areas described as very remote. This contrasts with other parts of the Highlands & Island Enterprise area, where very remote small towns and very remote rural areas are home to a much higher proportion of residents.

Mid-2007 population estimates suggest that 18% of the population of Moray is aged under 16yrs, 61% is of working age and 21% is of pensionable age.

However, Moray is relatively short of young people in their late teens and early twenties, especially young women. Almost three quarters of those brought up in the area leave, often for work or education in the cities. Much of the population growth experienced in the region in the past twenty years has been fuelled by the in-migration of armed forces personnel and support staff, and more recently the significant increase in East European migrants to Moray.

Deprivation

Overall, Moray is one of the least deprived areas in Scotland, as defined by the Scottish Index of Multiple Deprivation (SIMD), having no data zones in the 15% most deprived in Scotland and just 2 in the 20% most deprived areas, both of which are in Elgin. This represents just 1.7% of Moray's data zones, the lowest in Scotland with the exception of the three island groups. However, the rural nature of Moray means that 27.6% of its data zones are within the 15% most access deprived in Scotland, due to the financial cost, time and inconvenience of travelling to basic services.

There is some concern that the SIMD does not accurately measure the incidence of deprivation in rural areas, due to the lower concentration of the population. The ranking of an area within the 20% most deprived relies on there being a high proportion of the population in any one datazone experiencing deprivation of some kind. In rural areas, of which a large proportion of Moray is made up, the sparse distribution of residents can mean that pockets of deprivation are missed.

Health

The General Register Office from Scotland statistics show that, for the years 2005-2007, the life expectancy at birth in Moray for males was 75.9 years, above the national average of 74.8 years, and for women was 80.2 years, above the national average of 79.7 years. Overall the life expectancy at birth in Moray at 78.0 years is above the national average of 77.4 years.

General health in Moray is reported as being slightly better than nationally with nearly 93% of Moray's population reporting good or fairly good health and just 7% reporting not good health. This compares with 90% & 10% respectively for Scotland. Around 1/6 of Moray's population has a limiting long-term illness compared with 1/5 nationally.

The number of deaths from coronary heart disease (CHD) in Moray has remained static since 2004/05 but has shown a decrease for the Grampian region during the same period. CHD and cancer continue to be two of the main causes of premature death for those under 75 in Moray.

Economy & Employment

The patterns of economic involvement in Moray are very different. Compared to Scottish norms more people work part-time and self-employment levels are higher in Moray. The area has fewer students due to young people moving away from the area to access Higher Education. In common with other rural authorities there are proportionally more retired people living in the region.

There are fewer managerial and professional jobs (21%) compared with Scotland (26%) and many more people work in skilled trade and processing occupations. One third of all jobs are part-time. More than half of female workers work part-time (57%) compared with 47% of female workers who work part-time in Scotland. The structure of the economy and relative importance of primary sectors and others that offer low and semi-skilled employment also has an impact on average earnings

Of those young people who leave Moray to enter higher education, there is a low return to the area to seek employment. Fewer graduates are employed compared to Scottish norms and business research and development is extremely low. In Moray there has been a small number of companies providing graduate employment. This has consisted of a total of 15 companies.

Housing

Between 2002 and 2007, the number of households in Moray increased by 6.3%, from 36,230 to 38,521. However, over the same period, the number of dwellings increased by 5.2%, from 39,123 to 41,172. Over 3% of dwellings are vacant, with a further 1.4% being second homes. Dwellings in council tax bands A to C represent 68% of total dwellings, while 26% are classified as bands D & E, the remaining 6% falling into bands F to H. 13% of dwellings are flats, 20% are terraced properties, 31% are semi-detached and the remaining 36% are detached, a surprising breakdown considering the council tax band breakdown.

Environment

Moray has a high quality environment, recognised by international, national and local designations.

Much of the national environment of Moray is of national importance – the Cairngorms, the Spey and the Moray Firth's rich marine ecosystem. There is an impressive diversity of often iconic species, such as capercaillie and wildcat and habitats such as threatened peatbog. There are protective designations for scenery, habitats and ecologically rich areas. Moray is also one of the most forested areas in Scotland (28% of land under forestry, Scotland's total is 15%)

The quality of Moray's natural heritage has been recognised at the European level through the designation of the Cairngorm's National Park, the Special Protection Areas, and Special Areas of Conservation. Moray contains 39 sites of Special

Scientific Interest, which are sites of key nature conservation and wildlife importance. Moray also contains a number of Areas of Great Landscape Value and the Cairngorms National Scenic Area.

The conservation, enhancement and promotion of Moray's built heritage is therefore important. In particular, this will mean safeguarding listed buildings, ancient monuments, archaeology and designed landscapes and to retaining buildings, townscapes and artifacts, which are part of Moray's character and identity.

1. HEALTH

Figures for Moray using 5-year totals from 1983 to 2007, show an increasing trend for all persons and males, while the trend for female suicides is slightly decreasing. However, over the last 10 years, the number of suicides has decreased, both overall and of males. The number of female suicides has increased slightly over this period.

The level of anti-depressant drugs prescribed continues to climb both nationally and locally. Since 2001/02 Grampian has seen an increase of 25% in the number of prescribed anti-depressants, this is compared to a national increase of 21%. The actual increase in the number of prescribed items in Grampian was 60,229, climbing from 236,928 in 2001/02 to 297,157 in 2006/07.

2. ALCOHOL

The number of alcohol-related deaths has increased over recent years, with approximately 75% being male. Out of over 400 local authority areas in the UK, Moray was ranked 14th for alcohol-related deaths in males between 1998 and 2004.

Over the past three years in Moray, there has been a 10% reduction in the number of alcohol-related hospital discharges bringing the figure back to the level of five years ago. This compares with a 2% rise nationally. The ratio of hospital discharges (with an alcohol-related diagnosis) to patients is currently the same in Moray as nationally at 1.4.

3. ELDERLY/VULNERABLE

Elderly - By 2011 the proportion of the population of Moray of pensionable age will increase from 20% to nearly 22%. Around 63% of the pensionable age group is female. By 2031 the projected percentage changes of the population who are pensionable age will increase to 39% and by 104% for over 75s. While Moray's percentage change for pensionable age is higher than the Scottish projection (31%), Moray is also 1 of 18 local authorities who project a decrease in their working age population over this period. The combined effect of these demographic trends could mean that health and social care service providers will have difficulty in recruiting sufficient numbers of staff which will then place an additional burden on unpaid carers.

There were approximately 3000 people with dementia in Moray in January 2007. By 2014 it is projected that there will be approximately 5500 people with dementia in Moray, an 83% increase. The estimated average cost per annum of a person with dementia is £25,472.

Moray is focusing services on the more dependant elderly population through the provision of more intensive services to the same number of clients despite a rising older population. This could indicate a need for, improved access to services, more preventative lower level service provision at lower dependency levels and a commensurate need to improve flexibility of home care provision for the more dependent.

Vulnerable - A total of 37 datazones in Moray are experiencing access deprivation, 36 drive time deprivation and 49 public transport deprivation. Excluding those areas experiencing access deprivation, there were 22 data zones in Moray that were suffering some form of deprivation in the SIMD 2006, i.e. they were ranked in the 20% most deprived for one or more domain. According to the SIMD 2006, 8,170 people in Moray are income deprived accounting for 9.3% of Moray's population. However results for August 2005 show that Moray has a child poverty level of 13%, below the average level of 19% amongst the 59 Scottish constituencies.

Moray has a higher level of fuel poverty than Scotland, with an estimated 27% of households in fuel poverty, compared with 19% in Scotland as a whole. Although fuel poverty is closely related to income - the likelihood of experiencing fuel poverty increases as household income decreases - there are several other factors that contribute to the incidence of fuel poverty. These include the age and type of dwelling, household composition, tenure, the energy efficiency of a building and the rurality of a dwelling. More likely to experience fuel poverty are households living in older and detached dwellings, older smaller and single pensioner households, those in the private sector, those with lower energy efficiency and those in rural areas.

4. HOUSING/HOMELESSNESS

There is an acute shortage of affordable housing in Moray. The Housing Needs Study shows an annual shortfall of affordable housing of 219 houses per annum for five years. An update of the housing needs model in 2008 identified that the annual shortfall had increased to 255 units. While investment in affordable housing provision has increased significantly since 2001, it is still insufficient to meet the identified shortfall.

While homelessness applications Scotland wide fell by 4.9% in 2007/08, in Moray homelessness applications increased by 6.8%. The Council is struggling to meet the Scottish Government's 2009 interim target for the abolition of priority need - on 2007/08 homelessness figures, the Council would require to deem an additional 70 households as in priority need.

5. ATTAINMENT/ACHIEVEMENT

The office of National Statistics data show that Moray's working age population is generally less qualified in all but one of the NVQ levels than national comparisons. In the lower level qualifications, NVQ1 and above (e.g. fewer than 5 Standard Grades or equivalent), Moray's working age population has been above the national average for 3 years. At the top level, in 2007, 27% of Moray's working age population were educated to HND, degree level or equivalent, compared to 33.2% nationally. Between 2005 and 2007, Moray's performance at levels NVQ1 (fewer than 5 standard grades or equivalent) and NVQ2 (more than 5 standard grades or equivalent) has improved at a higher rate than national improvement. However, although Moray has improved at levels NVQ3 (2 or more Highers or equivalent) and NVQ4 (HND, Degree or Higher Degree), it is at a rate significantly below national improvement therefore the gap has widened since 2005.

School attainment data shows a mixed picture, where Moray's performance has been equal to or better than comparator authorities in the lower levels of Standard grades. Generally attainment, in Moray, at Standard Grade credit level and Higher has been below comparator and national results although for 5+ level 5 (Credit and Intermediate 2) in S4 and 1+ level 6 (Higher) in S5, Moray moved ahead of the national position and the comparator average in 2008. All four indicators in S6 improved in 2008, to be equal to or above national figures.

The issue of general learning opportunity uptake is derived from a new Scottish Funding Council study that shows that this is low in Moray compared to Scottish standards when part time participation is considered. However the participation levels for full time and higher education is in line with the national picture.

6. YOUNG PEOPLE

Scottish Government publish statistics on school leaver destinations providing further evidence that a high and increasing proportion of school leavers in Moray, 37% in 2007/08 compared with 25% nationally and 27% in comparator authorities go on to employment, suggesting a link to Morays' predominately low skilled workforce and limited managerial employment opportunities, potentially reducing the likelihood of children returning to the area following full time study. update from committee report

In Moray the percentage of young people who leave school, are unemployed but actively seeking employment or training has increased from 9% (2004/05) to 12% (2006/07) but decreased to 9% (2007-08). The numbers who leave school are unemployed and are not seeking employment or training has decreased from 2% to 1% over the same period. In 2007/08 Moray is just below the national average for both indicators.

7. FLOOD ALLEVIATION

Damaging floods in 1997 and 2002 have necessitated expensive Flood Schemes in Elgin, Forres, Rothes and Lhanbryde. In 1997 floods in Moray caused, 1200 people to be evacuated from 400 homes in Elgin area. The damage cost to the Council directly was calculated at more than £3.5m. In April 2000 flood damage cost a further £600,000. In 2002 flooding caused £3.2m damage to council properties. The losses to business and industry over the same period came to tens of millions of pounds, and the flooding risk continues to threaten the viability of many businesses in the Moray area.

8. ECONOMIC DEVELOPMENT

Whilst Moray enjoys an overall high employment rate of 76.6% in comparison to UK average at 69.2%, it has the highest proportion of low-paid workers in Scotland. The Median Gross Weekly Earnings for full-time employees in Moray decreased slightly in 2007 to £377.30, 85.6% of the national average (£441) and 82.2% of the UK average (£459). The position against median Scottish Gross Income in 2005 was 88.5%. Unemployment in Moray is generally seasonal, with the highest rates in the first quarter of the year and the lowest in autumn. These seasonal trends are driven by food production and processing, and tourism.

Moray's total GVA has grown by 2.7 % per annum since 1971. This is a faster long-term growth rate than for Scotland. Growth was strongest in the early 1990s and since 1999. By sector, 70% of Moray's GVA is accounted for by public administration (the largest single sector); manufacturing (a major component being whisky); business services; and retail and wholesale. The number of businesses surviving beyond their first and third year of trading in Moray also reflects favourably against the national average.

In Moray, the employment structure is dominated by public sector jobs, with declining primary and manufacturing sectors. The single biggest occupational grouping is skilled trades due in large part to the RAF operations and manufacturing base in Moray accounting for 17% of the workforce. Moray is typically under represented in the higher end occupations of managers and senior officials, and professional occupations. In contrast, a higher proportion of the Moray workforce is employed in

occupations at the other end of the scale – skilled trades, personal services, process plant and machine operatives, and elementary occupations – which account for 51% of the workforce compared with 39% nationally.

9. ROADS/TRANSPORTS INFRASTRUCTURE

Moray has a high dependency on car travel, with Moray having one of the highest rates of car ownership per household in Scotland. Moray has a significantly higher availability of cars per household than the national average with only 18% of households in Moray having no car compared to 32% in Scotland. Road traffic (freight and car travel) has increased by 19% over the last 10 years, above the national average of 16%. Moray has the third highest level of people driving their car everyday in Scotland, only Aberdeenshire (57%) and East Renfrewshire (54%) have a higher rate. The higher rate of car dependency may be linked to the 'rural' nature of Moray, with the area classified as mainly 'accessible rural' or 'remote rural', where the level of 'everyday' drivers is 53% and 49% respectively, compared to 33% for 'large urban areas'.

10. EFFICIENCIES

Moray Council

The Council will continue to monitor and report progress against efficiency targets and is taking part in the government funded initiative to use the nationally developed toolkit to identify further efficiency and improvement opportunities. Locally this project is called Designing Better Services and phase 1 to identify potential opportunities was completed in September 2008. The Council is also committed to Partnership working to ensure that economies of scale are achieved where possible and that resources are utilised in a co-ordinated way. The Council is also a member of Scotland Excel to support national procurement initiatives.

Health & Social Care Infrastructure

NHS Grampian has introduced a Change and Innovation programme, which is a key part of the NHS Grampian Health Plan 2005-6. The programme will ensure continuing improvement of services for patients, reduction in waiting times and capacity to cope with increasing demand for health services.

This re-design of services will make sure that hospital specialists are able to concentrate on caring for people who need their specialist skills. There will be a shift in the balance of care by improving the range of services provided by primary care teams (GP practices). People who require ongoing social care will be cared for appropriately in a community setting and not in hospital. We will provide more services nearer to people in their own communities. Pharmacists, community carers, dentists, optometrists, GPs and nurses will work together to promote anticipatory care.

We will provide self care by providing more opportunities for people to lead healthier and socially rewarding lives. Information and support will be provided to ensure and equip people to take more responsibility for managing their own health and well being.

EVIDENCE BASE

Absence - Primary School - In primary schools, absence figures for 2004/05 to 2007/08 are very consistent, accounting for around 4.5% of half days. In 2007/08 16% of all absences were reported as unauthorised. In 2004/05, truancy accounted for 43% of unauthorised absence; this fell to 17% in 2006/07 and increasingly slightly to 21% for 2007/08. Putting these figures in perspective, truancy accounted for 7% of total absence in 2004/05, falling to 2% in 2006/07 and increasing slightly to 3% for 2007/08.

Absence - Secondary School - Absence rates in secondary schools in 2007/08 were 8.1% of half days, of which 31% was unauthorised absence, with truancy accounting for approximately 45% of that. Truancy accounts for approximately 14% of total absence. The absence rate has dropped from 9.2% of half days in 2006/07 to 8.1% in 2007/08. Of this, the proportion of unauthorised absence has actually increased from 29% to 31%. In 2004/05, truancy accounted for 59% of unauthorised absence, falling to 38% in 2005/06 and then rising steadily to 45% in 2007/08. Despite this fluctuation, truancy has consistently accounted for around 13% of total absence in each of the last 4 years.

Additional Support Needs – Disability - There were 346 Primary pupils, 4.9% of all pupils, with a Record of Needs, Co-ordinated Support Plan and / or Individualised Education Programme in Moray. This compares to the comparator authorities' average of 5.2% and national average of 4.8% of all pupils. There were 287 Secondary pupils, 4.8% of all pupils, with a Record of Needs, Co-ordinated Support Plan and / or Individualised Education Programme in Moray. This compares to the comparator authorities' average of 4.8% and national average of 4.3% of all pupils.

Additional Support Needs - Language - There were 201 pupils categorised as being from a minority ethnic group, 244 categorised as white other and 114 as not known / undisclosed. Of the 13,002 pupils in publicly funded schools in Moray there were 246 pupils (1.9%) whose main home language is neither English, Gaelic, Scots Doric, nor Sign Language, below the national average of 3.4%. Moray has 35 languages with the three main languages, after English, reported as Polish, Scots and Portuguese. There were 185 pupils reported as having English as an additional language.

Additional Support Needs - Pre-school - Based on the 2008 census data received, in Moray 40 children registered for pre-school education did not have English as their home language, 2.1% of all registrations. Seventy children were reported as having Additional Support Needs, 4.2% of all registrations and 20 pre-school children had a Co-ordinated Support Plan, 1.4% of all registrations.

Additional Support Needs – Reasons Primary - The main reasons for support for Primary pupils with Additional Support Needs include: autistic spectrum disorder (19%); social, emotional and behavioural difficulty (18%); language or speech disorder (15%); other moderate learning difficulty (15%) and learning disability (15%). The majority of needs are addressed by providing additional specialist teaching or non-teaching support. Nationally, the principle reasons and the nature of support provided are similar.

Additional Support Needs – Reasons Secondary - The main reasons for support for Secondary pupils with Additional Support Needs include: learning disability (45%); dyslexia (23%) and social, emotional and behavioural difficulty (21%). The majority

of needs are addressed by providing additional specialist teaching or non-teaching support. Nationally, the principle reasons and the nature of support provided are similar.

Alcohol - Consumption Adults - The Scottish Health Survey, 2003 provides data on adult alcohol consumption in Grampian region but unfortunately does not specify figures at a Moray level. Figures for Grampian indicate that on the heaviest drinking day in the week prior to the survey, 39% of men had consumed 4 or more units of alcohol and 31% of women had consumed 3 or more units. 20% of men and 16% of women had drunk double the daily-recommended limit or more and would therefore be considered binge drinkers. Figures for weekly consumption indicate that men drink on average 14.5 units per week and women drink an average of 6.2 units per week. 22% of men and 15% of women responded that they drank more than the recommended weekly limit for their gender. 5% of men drank over 50 units a week and 1% of women drank over 35 units per week.

Alcohol Consumption - Young People - The SALSUS Survey 2006, Moray Report, indicated that the numbers of 13 and 15 year olds that have ever had a drink has not changed significantly since 2002, at 65% and 90% respectively. The numbers that had drunk in the last week, 19% and 47%, and those who indicated that they drank at least once a week, 13% and 38%, were also not significantly different from 2002. Of those pupils who had drunk in the previous week, the most popular type of alcoholic drink with 13 year olds was alcopops, followed by beer/lager/cider and spirits/liqueurs. 15 year olds drank predominantly beer/lager/cider, followed by spirits/liqueurs and alcopops. Beer/lager/cider was most popular with boys while alcopops were most popular with girls. The most common source of alcohol for both age groups was buying from a friend or relative. In the previous 4 weeks, 57% of 15 year olds and 23% of 13 year olds had got someone else to buy alcohol for them. The most common location for 13 year olds to drink alcohol was in their own home. Outside, at a party with friends and at someone else's house were also frequently reported. 15 year olds most commonly drank outside but also frequently at a party with friends, at home or at someone else's house.

Alcohol - Crime - A Christmas initiative aimed at combating alcohol-fuelled violence in Elgin town centre brought about a marked reduction in the number of incidents, with no evidence of displacement to other locations. The 6 crimes/offences of serious assault, petty assault, breach of the peace, drunk and incapable, drinking in a public place and vandalism were monitored and overall a reduction of 56% was achieved. Compared with the corresponding dates in 2006, 2007 showed a 50% reduction in petty assault, from 8 to 4, a 42% reduction in breach of the peace offences from 12 to 7, and an 83% reduction in vandalism offences, from 6 to 1. There were no serious assaults or drunk and incapable offences in either period and just 1 offence of drinking in a public place in 2006.

Alcohol - Crime - A problem profile into alcohol-related street violence and disorder in Moray Division identifies that in December 2006, of 280 offences of serious assault, petty assault and breach of the peace, 242 were committed by 190 persons who were under the influence of alcohol at the time. This compares with 277 of 282 offences committed by 192 persons under the influence of alcohol in December 2005.

Alcohol - Crime - The relationship between alcohol and violence is well known and figures from the British Crime Survey 2006/07 indicate that in 46% of violent incidents the victim believed the offender to be under the influence of alcohol. This figure has remained approximately the same for 6 consecutive years. The percentage is higher

for incidents of stranger violence than those of acquaintance violence and domestic violence. Offenders under the influence of alcohol committed 59% of incidents of wounding and 46.5% of assaults with minor/no injury.

Alcohol Crime – Young People - The number of reports of underage drinking in Moray shows a reducing trend over the last 2½ years, with a total reduction of 38% over this period (1st half yr figures: 05/06 to 08/09).

Alcohol - Deaths - The number of alcohol-related deaths has reduced over recent years, from 27 in 2004 to 19 in 2007 increased over recent years. In 2004, 20 of the 27 deaths were males (74%). Out of over 400 local authority areas in the UK, Moray was ranked 14th for alcohol-related deaths in males between 1998 and 2004. 36% of alcohol-related deaths were aged 65+ years and 6% were under 45 years. This compares with 27% aged 65+ years and 15% under 45 years in Scotland and Grampian.

Alcohol – Domestic Abuse - There is a further link between domestic abuse, which is also increasing, and alcohol, with 69.5% of offenders and 56.4% of victims being under the influence of alcohol at the time of the incident.

Alcohol - Driving - Drink driving has reduced in Moray over recent years, from 178 offences in 2004 to 159 in 2006. However, there have been 85 drink-driving collisions in this 3-year period, causing 3 fatalities, 13 serious injuries and 33 slight injuries.

Alcohol - Driving - Over the last 3 years, there have been 85 drink-driving collisions, most of which were damage only. However, there were 3 fatal collisions, representing 4% of the total, which resulted in 3 fatalities, 8% of the total. A further 6 collisions, 7%, caused serious injury to 13 casualties, a ratio of more than 2 casualties per collision. 17 collisions resulted in slight injury to 22 casualties. Nearly ¾ of drink-drivers are male and around 22% are aged 21-25yrs, the most common age group for both genders. Close to ½ of drink-drivers are aged 30 or under, which was the same for both males and females.

Alcohol - Elderly - 36% of alcohol-related deaths were aged 65+ years and 6% were under 45 years. This compares with 27% aged 65+ years and 15% under 45 years in Scotland and Grampian.

Alcohol - Hospital Discharges – In Moray, the number of alcohol-related hospital discharges increased by 63% between 1999/00 and 2006/07, compared with a 24% increase nationally. In 2006/07 59% of alcohol-related discharges in Moray were diagnosed with a mental or behavioural disorder, compared with 66% nationally. However, there were some differences between Moray & Scotland in the division of diagnoses within this category. The main difference was the proportion diagnosed with alcohol dependence. The majority of discharges, around 71%, were males and the number generally increases with age. In Moray, 41% of this category was classified as alcohol dependent, compared with 16% nationally. Scotland had slightly larger proportions of discharges diagnosed with acute intoxication and harmful use, at 28% and 45% respectively, compared with 21% and 33% in Moray. Of the 559 discharges in 2006/07, 134 (24%) were for alcohol dependence, 109 (20%) were for harmful use, 80 (14%) were for alcoholic liver disease and 68 (12%) were for acute intoxication. These figures are similar to those for Scotland as a whole with the exception of alcohol dependence, which only accounted for 11% of discharges in Scotland. In 2004/05, the majority of discharges in Moray, around 75%, are males, slightly higher than nationally. Of the overall total, the most common diagnosis was a

mental or behavioural disorder due to use of alcohol, accounting for 58% of discharges, compared with 66% nationally.

Alcohol - Hospital Discharges – In 2006/07, approximately 15% of discharges in both Moray and Scotland as a whole were diagnosed with alcoholic liver disease and around 9% of both populations were suffering the toxic effects of alcohol.

Alcohol - Hospital Discharges - The number of alcohol-related discharges admitted as an emergency generally increases with age, from 1% of under-15s to 26% aged 60yrs and over. In most age groups, similar proportions of people were admitted Monday to Thursday as Friday to Sunday. However, although 10% of the admissions were aged under 25yrs, on Monday to Thursday only 7% fell into this age group but from Friday to Sunday 15% were of this age.

Alcohol - Hospital Discharges - The number of alcohol-related hospital discharges increased by 82% between 1999-00 and 2004-05, compared with a 21% increase nationally. However, over the past three years there has been a 10% reduction in the number of alcohol-related hospital discharges bringing the figure back to the level of five years ago. This compares with a 2% increase nationally. Moray currently matches the Scottish ratio of 1.4 for hospital discharges of patients with an alcohol-related diagnosis.

Alcohol - Young People - During the first 3 quarters of 2007/08, there have been 28 Operations Avon carried out across Moray to tackle underage drinking. A total of 1583 youths were spoken to, 127 of whom were found to have been involved with alcohol in one of 4 categories: possessing alcohol, being under the influence of alcohol, being in the company of others in either of these 2 categories or being in the area where alcohol was secreted. Alcohol was seized on 77 occasions. A total of 87 letters were sent to parents regarding their children's involvement in underage drinking in one of the previously mentioned categories.

Alcohol – Young People - In quarter 1 2007/08, 41% of young people (24yrs & under) reported or warned in Moray Division, were recorded as having taken drugs, been drunk or had been drinking at the time of offending. In quarter 2, this figure was 49%, and in quarters 3 & 4 it was 45%.

Alcohol – Young People - The Grampian Youth Lifestyle Survey (2007) found that of the young people in Moray, 74% had taken an alcoholic drink compared with 69% of those in Grampian surveyed. As would be expected this figure varied by school year ranging from 46% for 1st year pupils in Moray to 99% for 6th year pupils. Out of all the responses, 108 (47%) pupils had consumed alcohol in the seven days prior to the survey. For these, the mean consumption level was 20.9 units for Moray pupils compared to 18.5 units overall in Grampian.

Anti Social Behaviour - Young People - Since the first ABC was negotiated on 12th July 2005, there have been a total of 106 referrals, 47 of which resulted in the negotiation of an ABC (11 are still pending). Of these 47, 30 have been successful, 10 unsuccessful and 7 are still live. Of the 10 unsuccessful ABCs, 6 were breached, one was transferred to an alternative measure and 3 failed for other reasons. This is a 75% success rate (based on successful completions as percentage of all those completed).

Arts - Moray has a strong arts and cultural network of organisations and activities which promote arts throughout the region. Moray Art Centre based at the renowned Findhorn Foundation is a non-profit, centre for the arts running an annual local and

international programme of exhibitions, events, classes and art residencies. The North East Arts Touring (NEAT) organise for a number of touring productions and visual arts projects to be brought to various venues around Moray. The 'Out of the Darkness Theatre Company' is a professional theatre company working with adults with special needs who regularly tour through Moray and the Highlands. The Elgin Museum and Elgin Library Gallery hold regular art exhibitions, the latter attracting over 30,000 visitors per annum.

Arts - The area's 2 principal museums Elgin, supported by the Council, and the Falconer in Forres, managed by the Council, are characterised by an exceptionally high level of voluntary input. 28 volunteers at the Falconer gave more than 2,000 hours towards the museum's refurbishment in a 6 month period. The other main heritage attractions (supported by the council) in Moray include the Tomintoul museum, Nelsons Tower (Forres) and Buckie Fishing Heritage Centre. While the number of visits to/enquiries to the museums has increased 14% from 27,579 to 31,446 between 2006/07 and 2007/08, the volume of people visiting the museum in person has dropped 10% from 25,273 to 22,738 during the same period. Nationally Moray performs well below the Scotland average with Moray having 313 (per 1,000) visits/enquiries compared to the national figure of 1,844 (per 1,000).

Arts - The Forres Tourist Information Centre was incorporated within the Falconer Museum following the museum's refurbishment in 2007. This has led to a significant increase in visitors. The Tomintoul Museum and Tomintoul Tourist Information Centre were integrated in March 2008. The Centre is currently the subject of a study to develop it as a gateway to the Cairngorms National Park, to increase visitors to Tomintoul and to direct visitors to the remainder of Moray.

Benefits - In May 2008, 890 or 14% of key benefit claimants were claiming job seekers allowance as their main benefit. However, the most common main benefit is incapacity benefit, claimed by 3,400 or 54% of key benefit claimants.

Benefits - In Moray in June 2008 there were 926 people claiming Jobseekers Allowance, which is 1.8% of the resident people of working age, the Scottish average is 2.3%. In December 2007 there had been a year on year reduction of the number of people claiming Jobseekers Allowance, which is in keeping with the national trend. The percentage of JSA claimants over 1 year is 7.5% in Moray against Scottish average 10.5%. At June 2008, the percentage of working age key benefit claimants (incapacity, lone parents etc) is 12.1% in Moray against 16.2% in Scotland.

Benefits - Mental Health - In Grampian there are a variety of types of mental health issues present, figures show a steady increase in the number of people being diagnosed with a mental health problem. There is year on year growth both nationally and locally. 1400 people in Moray receive the higher level of the Disability Living Allowance due to a mental health problem.

Benefits - School Meals - In Moray, over the past 3 years, there has been a lower level of entitlement to free school meals for Primary pupils in comparison to our comparator authorities' and national averages. Pupils entitled to free school meals are those within families who received Income Support (IS) or Income-based Job Seekers Allowance (IBJSA). Those within families who received support under Part VI of the Immigration and Asylum Act 1999 may also be entitled. Children who receive IS or IBJSA in their own right are also entitled to free school meals. Also entitled are children whose parents or carers receive Child Tax Credit, do not receive Working Tax Credit and have an annual income (as assessed by the Inland Revenue) of below £14,995.

Benefits - Unemployment - Unemployment in Moray is generally seasonal, with the highest rates in the first quarter of the year and the lowest in autumn. These seasonal trends are driven by food production and processing, and tourism. The pattern of claimant count across Moray shows considerable variation. The highest rates (over 3 per cent) are in Forres SR and Buckie SR. The lowest rates (less than 1.5 per cent) are found in Lossiemouth SR and the western and eastern parts of Elgin SR. The degree of seasonality also varies across the sub-regions. The strongest seasonality is found in the more rural areas of Rural South Moray and Keith SR. The least seasonality is found in those sub-regions where manufacturing and the service sector is more important such as Elgin SR and Forres SR.

Child Poverty - Results for August 2005 show that Moray has a child poverty level of 13%, below the average level of 19% amongst the 59 Scottish constituencies. Glasgow North East at 44% has the highest level of child poverty and at 7%; East Dumbartonshire, Gordon and West Aberdeenshire and Kincardine have the lowest level of child poverty.

Children's Reporter - In Moray, for the period ended 31st March 2007, 43 children were identified as persistent young offenders and 44% of offence referrals were attributed to persistent young offenders, above the national average of 32.5%.

Children's Reporter - The number of Children's Hearings held has reduced by 3% to 453 during 2006/07. Time Interval Standards for the Children's Hearings System were published in 2001 and Moray's performance was above national levels in four of six categories.

Children's Reporter - The Scottish Children's Reporter Administration in their Annual Report for 2006/07 reported that there were a total of 682 children referred, 4.3% of the population aged under 16 years, below the national average of 6.1%. 430 children, 2.7% of the under 16-age population were referred on non-offence grounds, again below the national average of 4.8%. 304 children, 3.4% of the under 16-age population were referred on offence grounds, equalling that of the national average.

Crime - Overall for 2006/07, Moray was ranked 18th out of 32 local authority areas in Scotland for total recorded crimes per 10,000 population (where 1 has the highest rate and 32 the lowest). Moray's highest ranking of 12th was for the crime category crimes of dishonesty, while their lowest ranking was for non-sexual crimes of violence for which they ranked 27th out of 32. In all crime categories, Moray's ranking was better than or equal to Scotland's.

Crime - The percentage of crimes cleared up in Moray fell by 2% to 41% in 2006/07. The percentage of crimes cleared up for Scotland as a whole also rose, by 1% to 47%. The trend in Moray over the last 10 years is virtually level compared with a slightly reducing trend in Scotland as a whole.

Crime - In Moray in 2007/08 the total number of crimes recorded reduced by 10% from 2006/07. In Scotland the number of crimes recorded in 2007/08 decreased by 8% from 2006/07. The rate of crimes in Moray in 2007/08 was 609 per 10,000 population, which is better than Scotland where the rate was 749 per 10,000 population, although both are lower than 2006/07 rates. The total number of crimes recorded in each of the last 11 years shows a marginally increasing trend in Moray.

Crime - Rowdy behaviour as reported by Grampian Police includes offences of drunk & incapable, breach of the peace and urinating. Around 92% of rowdy behaviour

offences are breach of the peace, the remainder generally being split fairly evenly between drunk & incapable and urinating. Over the last 11 years, the number of incidents of breach of the peace (BoP) shows a slightly increasing trend, while the number of drunk and incapable (drunkenness) offences shows a strong reducing 11-year trend. The overall trend in the number of incidents of rowdy behaviour is downward

Crime - The number of instances of drinking in public places shows a steeply reducing trend over the last 2 years, with just 31 incidents in the first 2 quarters of 08/09 compared with 86 in the corresponding period of 06/07, a reduction of 64%. There has been a marginal increase of 6 incidents from the first 2 quarters of 07/08.

Deprivation - Excluding those areas experiencing access deprivation, there were 22 data zones in Moray that were suffering some form of deprivation in the SIMD 2006, i.e. they were ranked in the 20% most deprived for one or more domain. Without exception, these datazones are located within urban population centres of Moray, namely Elgin, Forres, Lossiemouth, Buckie and Keith. The majority of these datazones are categorised as deprived in just one domain. However, 6 appear in the 20% most deprived of 2 domains and one datazone, Bishopmill East/Cathedral, is experiencing deprivation in 3 domains: health, education and employment.

Deprivation - Access to Services - In 2006/07 80% of public service buildings were suitable and accessible to people with disabilities as opposed to 11.1% in 2004/05. Unfortunately there are no equivalent figures for private buildings and businesses.

Deprivation - Access to Services - The Scottish Index of Multiple Deprivation also highlights the inaccessibility of some areas of Moray. The SIMD records that 17% of data zones in Moray are within the 5% most access deprived areas in Scotland, 9% are in the 10%, 6% in the 15% and 4% in the 20% most access deprived areas in Scotland. It should be noted that as these sources focus on services that are found in most localities they arguably mask difficulties in accessing services such as large leisure facilities such as cinemas, retail warehouse complexes and medical services. Access to Dr Gray's Hospital in Elgin and Aberdeen Royal Infirmary, for example, are an issue for some Moray residents.

Deprivation - Access to Services - There are just 3 railway stations in Moray, at Forres, Elgin and Keith, meaning that there is no rail network in the southern rural areas of Moray, contributing to the higher level of car ownership in Moray. The use of buses and rail travel may appear low compared to the Central Belt and other more urbanised parts of Scotland. Despite the fact that Moray is a rural, peripheral area with a relatively high car ownership rate, by necessity, it is encouraging that numbers of rail and bus passengers are increasing steadily year by year.

Deprivation - Alcohol - In the least deprived areas, the rate in Moray for males is twice that nationally, but for females is only marginally higher in Moray than Scotland. For both genders, the differences between Moray and Scotland rates are marginal in the middle 2 quintiles. However, in the most deprived quintile, the rate for males in Moray is 43% higher than nationally, but the rate for females is 112% higher in Moray than in Scotland as a whole.

Deprivation - Alcohol - There is a relationship between the rate of alcohol-related discharges and deprivation. In Moray, there were 55 alcohol-related discharges per 10,000 in the least deprived quintile, while the rate for the 4th quintile (the most deprived quintile with data for Moray) was 160 per 10,000. These compare with 27 per 10,000 and 99 per 10,000 respectively for Scotland as a whole.

Deprivation - Crime - There are 18 datazones in Moray that were ranked in the 20% most deprived in terms of crime, all of which are located in towns: 7 in Elgin, 4 in each of Forres and Buckie, 2 in Lossiemouth and 1 in Keith. Moray's overall crime rate per 10,000 population places them 21st out of the 32 local authorities, although they have different rankings in the 5 different crime categories. The most prevalent crime category in Moray, accounting for about 39% of recorded crime, is crimes of dishonesty such as housebreaking, theft and shoplifting. The next most common category is fire-raising, vandalism etc, while the least common crimes fall into the categories non-sexual crimes of violence and crimes of indecency. Clear-up rates in Moray show an almost exact reverse picture in that non-sexual crimes of violence have the greatest clear up rate of 77%, while crimes of dishonesty have the lowest clear up rate, at 32%.

Deprivation - Crime - Within Moray there are 12 data zones in the 15% most crime deprived, representing 10.3% of data zones in Moray.

Deprivation - Education - Just 2 of Moray's datazones are suffering education deprivation, both of which are in Elgin. Figures for 2006/07 indicate a sharp drop between the percentage of S4 pupils attaining 5 SCQF awards at level 5 and above compared with at level 6 and above, from 93% to 35%. At S5, there is also a sharp, though slightly smaller % decrease, from 52% to 10%, for those attaining 1 award at level 6 and above and those attaining 5 awards at level 6 or above. At S6, 27% of pupils gain 1 award at level 7 and above. There is a considerable difference in the percentages of male and female pupils leaving school between S4 and S6, at 69% and 54% respectively. However, in both cases, the largest drop is between S5 and S6, at 52% and 42% for males and females respectively.

Deprivation - Employment - As with income deprivation, the more rural areas of Moray have a lower incidence of employment deprivation. Four datazones, 2 in Forres and 2 in Elgin, are ranked in the 20% most employment deprived.

Deprivation - Health - There is only one data zone – in the north east of Elgin - that falls into the 20 per cent of most health deprived areas in Scotland. As with other indicators, there is a relatively high level of health deprivation in northern Forres and parts of central and southern Elgin. However, there are also areas of higher health deprivation in Lossiemouth and there is also an area in the second quintile in Keith.

Deprivation - Health The area with the highest incidence of income deprivation appears to be the town of Buckie, with the east of the town performing poorly on this measure. In addition, the area to the north of Forres and parts of Elgin fall into the second quintile i.e. they are ranked in the 20 per cent to 40

Deprivation - Housing - 4 datazones in Moray, 2 in Elgin, 1 in Forres and 1 in Lossiemouth, were ranked in the 20% most deprived in the SIMD 2006.

Deprivation - Income - Moray has a relatively low level of income deprivation. All rural areas fall into one of the three lower quintiles for income deprivation, with rural areas between Elgin and Lossiemouth, areas south of Elgin and the Aberlour and areas around Dufftown being amongst the 20 per cent of least income deprived areas in the country. There are however, a number of pockets of income deprivation. Within the towns, areas of low and high income deprivation are to be found in neighbouring data zones. This is particularly the case in Forres and Elgin.

Deprivation - Long Term Illness - The 2001 Census indicated that there were 13,776 people in Moray with a limiting long-term illness (LLTI) - approximately 16% of the population aged 16-74yrs are suffering from a long-term illness, split equally between male & female. This is nearly 4% lower than the comparative national figure. Nearly 1/3 of this age range is economically inactive, around 15% of whom are permanently sick or disabled, nearly 3/5 of whom are male. The average age of someone with such an illness in Moray is marginally higher than Scotland, at nearly 59yrs, compared with nearly 58 for Scotland. The proportion of Moray's population that lives in social-rented accommodation is approximately 20%. However, the proportion of those with a LLTI living in social-rented accommodation is more than 10% higher, at 31%. Conversely, the proportion of those with a LLTI in owner-occupied accommodation is smaller than for the population of Moray as a whole.

Deprivation - Smoking - There is a correlation between the level of smoking and deprivation, with the smoking rate in the most deprived areas more than 3 times that in the least deprived areas, at 41% compared with 13%.

Disabilities – Adults - Compared to other Scottish local authorities, Moray has the 8th highest proportion of adults with a learning disability known to the local authority. Moray has a higher proportion of adults with a learning disability who attend alternative day opportunities (32%), as opposed to solely accessing day centres, compared to the Scottish average (27%). Though Moray has a higher level of people with learning disability who are known to the local authority, a total of 449 adults with a learning disability, equating to 6.3 per 1,000 of the Moray population, does not have a higher estimated level of adults with learning disability as evidenced by the considerable work undertaken with the development of the GP learning disability database which more closely represents that actual population numbers than those known to the authority. Moray's GP practice prevalence of Adults with Learning disabilities is lower than the Grampian average, which in turn is greater than the Scottish average.

Disability – Adults - Of the 449 adults with a learning disability the highest concentration were male (56%) while the largest age grouping was 21-64 (80%). The age and gender groupings of Moray generally reflect that of the national picture.

Disability - Adults - The number of adults with a learning disability attending an alternative day opportunity has increased by almost 12% over the last 4 years. The number has increased from 253 (2004/05) to 282 (2007/08), many of the adults attend more than one alternative day service.

Disabilities – Children - Moray also has a high percentage of children assessed with or declared as having a disability. The number of pupils who were assessed or declared as having a disability in publicly funded schools in 2007 was a rate of 26 per 1,000 pupils. The national average was 15.8 and our comparator authorities were 17.1. Though this makes Moray the 4th highest area for school children assessed with or declared as having a disability it should be noted that there are wide variations in the extent to which pupils with disabilities have been identified in different local authorities. Therefore the information should not be considered comparable or as a direct indication of the number of children within the population as having or being declared as having a disability.

Disability - Carers - The percentage of Moray's population that is providing at least 1hr of unpaid care per week is below that for Scotland, at about 8% compared with nearly 10%. The average age of a carer is the same as Scotland at 48yrs.

Disability - Economy - Of the nearly 20,000 economically inactive people in Moray, nearly 1,000, 5%, are permanently sick or disabled, compared with over 7% of Scotland's economically inactive population of 1.3million.

Disability - Employment - In 2006/07, Moray Council supported 63 vulnerable adults into paid employment, a 34% increase from the previous year.

Disability – Limiting Long Term Illness - Of the nearly 20,000 economically inactive people in Moray, nearly 1,000, 5%, are permanently sick or disabled, compared with over 7% of Scotland's economically inactive population of 1.3million.

Domestic Abuse - Crime - The British Crime Survey indicates that in 2006/07 39% of perpetrators were under the influence of alcohol at time of offence and 15% were under the influence of drugs.

Domestic Abuse - Incidents - The number of incidents of domestic abuse has risen steadily over the last 8 years, from 479 in 1999/00 to 655 in 2006/07, a 37% increase. The rate of incidents per 100,000 population has risen from 562 to 723 over the same period, an increase of 29%. Around 59% of incidents are repeat incidents, 318 in 2004/05 rising to 385 in 2006/07. Although the vast majority of victims are female, accounting for around 90%, the proportion of male victims has increased slightly over the last 3 years, from 8% in 2004/05 to 10% in 2006/07 or 47 victims in 2004/05 rising to 66 in 2006/07. Conversely, the vast majority of perpetrators, around 90%, are male, but the proportion on female perpetrators has risen from 7%, or 39, in 2004/05 to 10%, or 63, in 2006/07.

Drugs - Consumption & Supply - The Community Safety Surveys of 2005 and 2007 and the Citizens Panel Survey of 2006 indicate that 55% to 65% of respondents think that drug misuse or dealing is not common in their neighbourhood and 70% to 80% have not personally seen incidents of drug misuse or dealing in the previous 12 months.

Drugs - Deaths - Data for Scotland indicates that on average, from 2003 to 2007, 81% of drug-related death victims were male and 2/3 were aged 25 to 44 yrs. In 2007, the median age of drug-related death victims was 34. There is no equivalent data available at Moray level.

Drugs - Deaths - In 2006 there were 5 drug related deaths in Moray, all of which involved heroin/morphine. 1 also involved diazepam, another also involved temazepam and 4 also involved alcohol. To the end of November 2007, there were 5 drug-related deaths. Opiates continue to feature in the vast majority of drug-related deaths and there is an increased trend of drug and alcohol intoxication being the cause of death.

Drugs - Deaths - The rate of drug-related deaths is lower in Moray than Scotland as a whole, at 0.04 per 1,000 population, compared with 0.07. Over the last 5 years, all the drug related deaths in Moray were due to drug abuse or were of unknown intent. There has been none due to intentional self-poisoning.

Drugs - Services - The source of referral to specialist drug services in 2006/07 differs between Scotland and Moray, the main difference being in the proportion of referrals made by a GP. Nationally, 27% of referrals were from a GP, whereas in Moray, this proportion was 51%. Just 3% of referrals nationally came from mental health professionals, with none being made from this source in Moray. However, of those

for whom information was available, 43% of new clients in Moray had co-occurring mental health issues, as did 42% of those nationally.

Drugs - Services - There are 8 needle exchanges operating in Moray, one of which opened in October 2007, and in 2006/07 there were 29910 needles distributed, 850 of which were combined syringes & needles, and there were 5693 needles returned.

Drugs - Services - There are only 2 organisations offering a treatment service to young people, compared with 4 organisations for adults. However there are 15 organisations that can provide prevention services for young people, compared with 8 adult prevention services.

Drugs - Substance Misuse - The trend for supply offences is increasing, with a 52.5% rise between 2004/05 and 2006/07. Over the same period, possession charges showed a 23% decrease, although in the first 8 months of 2007/08 there were 31% more possession charges than in the same period of 2006/07. Arising from the Youth Lifestyle survey 41% of pupils stated that it was very easy for them to get illegal drugs in Moray.

Drugs - Supply & Possession - The trend for supply offences is increasing, with a 52.5% rise between 2004/05 and 2006/07. Over the same period, possession charges showed a 23% decrease, although in the first 8 months of 2007/08 there were 31% more possession charges than in the same period of 2006/07.

Drugs - Supply & Possession - Between 2004/05 and 2006/07, the number of possession charges decreased from 367 to 284. However, the number of charges for possession of drugs from April 07 to Nov 07 is 31% higher than for the same period last year, 238 compared with 181 in 06/07.

Drugs - Supply & Possession - Intelligence suggests that there continues to be a ready supply of the Class A Drugs Heroin and Cocaine in Moray and that known addicts are committing shoplifting to fund their habit. There is also intelligence that crack cocaine is being used in the area in small amounts but as yet has not impacted on Moray as it has elsewhere.

Drugs - Supply & Possession - Supply offences have increased by 52.5% over the last 3 years, from 40 in 2004/05 to 61 in 2006/07. From April 07 to Nov 07 there were 5 more supply charges than for the same period last year. The number of charges recorded for each of the last 6 quarters fluctuate somewhat but the overall trend is increasing.

Drugs - Users - 96 new clients reported illicit drug use, their most commonly used illicit drug being heroin, with 77% of individuals reporting using it. Their next most commonly used drug was diazepam, closely followed by cannabis, reported as being used by 35% and 30% respectively of new illicit drug users in 2006/07. Figures for Scotland indicate that heroin use has reduced over recent years in all age groups, although 2006/07 figures suggest it may be levelling off. Use of diazepam has been fairly steady but displays an increase in all age groups but one (35-39yrs) in 2006/07, while cannabis use, which was increasing across all ages, shows an average 6% reduction in 2006/07. The highest level of heroin use is in 25 to 29 year olds, with 75% of new clients in this age group reporting using it in 2006/07. Diazepam is most commonly used by 20-24yr olds, 37% of whom reported using it, while cannabis is the most commonly used illicit drug of under 15 year olds, with 81% of new clients reporting using it in 2006/07.

Drugs - Users - In Moray, 41% of new clients in 2006/07 reported first using illicit drugs when under 15 years old and a further 46% were aged 15 to 19 years. This compares with 41% and 40% respectively nationally. For the majority of users (61% compared with 71% nationally), the onset of problem drug use is reported to have occurred within 6 years of initial use, with 38% of new clients identifying the onset of problem drug use as before age 20yrs. A further 33% indicated the age of onset of problem drug use as between 20 and 24yrs. The comparable figures for Scotland are 45% and 27%. The time between the onset of problem drug use until help was first sought was less than 2yrs for 74% of Moray's new clients in 2006/07. This compares with 61% of new clients nationally.

Drugs - Users - In Scotland, the overall trend is increasing, however, the last 2 years have seen a slight reduction in the number of new clients reported. The proportions of male and female clients are similar nationally, and nearly half of males are aged 20-29yrs. The median age of female clients in Scotland is 28yrs. However, the proportion of new clients aged under 25yrs is 8% higher in Moray than nationally, at 33% compared with 25%.

Drugs - Users - The number of new clients reported to the Scottish Drug Misuse database for Moray has increased steadily, from 56 in 2002/03 to 115 in 2006/07. For the year ended March 2007, approximately $\frac{2}{3}$ of the 115 new clients were male, almost half of whom were aged between 20 & 29 years. Unfortunately, no age breakdown is provided for new female clients due to the low numbers (<40).

Drugs - Young People - The results of the SALSUS Survey 2006, Moray Report, lend support to these figures. The most common drug offered to and used by both 13 and 15 yr olds was cannabis. 7% of 13yr olds and 30% of 15 yr olds had tried drugs, though only 4% and 12% respectively had used drugs in the last month. Of these, the average age of first use was 13 years. Approximately half of drug use in both age groups occurs outside, although 30% of 15 yr olds reported using drugs at someone else's home and 10% of 13 yr olds reported using drugs at a party. 48% of those who have used drugs reported that they were drinking alcohol the last time they used drugs. Over 80% of drugs were obtained from a friend but in the 13 yr age group, almost as many pupils (11%) obtained drugs from an immediate family member as from a stranger (12%). Although most pupils knew where to obtain information about drugs and were aware of some of the dangers, the 13 yr age group particularly displayed some gaps in their knowledge. For example, only 47% believe that injecting can lead to HIV and only 37% believe that heroin is more dangerous than cannabis. The vast majority of pupils, particularly in the 13 yr old age group, displayed a negative attitude towards drug use although 36% of 15 yr olds surveyed did not think that people who took drugs were stupid and 39% did not feel that all people who sell drugs should be punished.

Economy - Overall in Moray, primary products and manufacturing are being exported while services are generally consumed locally. The main exceptions are those services (for example, relating to visitors) that are effectively exported by being consumed within Moray by visitors. The value of sales by Moray producers total almost £1.8 bn per annum (2007). More than half (55 per cent) of these sales are made within Moray, with a further 14 per cent elsewhere in Scotland.

Economy - The leading goods-producing sectors operate almost exclusively on a pan-UK or international basis. This is most clearly represented in the food processing and beverages industries. Of particular importance to Moray is the export of whisky, of which over two thirds is exported outwith the UK and most of the rest to other parts of the UK (non-Scotland). Thus, over 90 per cent is exported outside of Scotland. In

terms of sales, alcoholic beverages are the most important sector in Moray after health services (which are primarily consumed locally). Overall Moray imports more than it exports – or consumes more than it produces - by a margin of about £500 mn

Economy - Business Deregistrations - Moray has performed better than Scotland as a whole in businesses de-registering since 2002/03. The rate of de-registrations in Moray fell from 21 (per 10,000 adult population) to 19 compared to the national average falling from 25 to 22 over the same period. While the level of de-registration does not necessarily mean business closures due to financial pressures the lower rate of de-registration in Moray does indicate Moray has a stable environment for businesses to operate. These figures may not, however, give the complete picture of start-up and closure activity in the economy. Some VAT exempt sectors and businesses operating below the threshold for VAT registration, of which there are many in Moray, will not have been included. In 2005 there were around 25% of businesses in Moray with 10 or less employees.

Economy – Business Survival Rate - Over the 5 years from 2000/01 the rate of newly registered businesses surviving beyond the first year of trading in Moray has been on a par with or above the national average. Businesses surviving beyond 3 years in Moray show an even healthier picture with survival rates continuing to remain above the national average. While the 3 year survival rate nationally has steadily grown from 66% in 1998/99 to 70% in 2002/03 the Moray rate has been far more fluctuant with a 74% survival rate in 1998/99 increasing to 80% in 2001/02 before falling sharply to 71% in 2002/03. The trend shows yearly fluctuations that appear to mirror the trends in the number of new business VAT registrations and business de-registrations above.

Economy – Business VAT Registrations - There were approximately 2,615 VAT registered business enterprises operating in Moray in 2006, a volume that has remained relatively static over the last 10 years. Moray lags behind the national average rate of new business start-ups. Over the period 2002/03 to 2006/07 the number of new VAT registered businesses shows yearly fluctuations, with Moray presenting an overall increase from 20 new start-ups (per 10,000 adult population) in 2002/03 to 21 in 2006/07, which is a rate of 5.7%. While the national average also reflects a similar trend over the same period, increasing from 27 to 28, Moray continues to perform below the national average of 8.6%. The actual number of new VAT registered businesses per year has risen in Moray from 140 in 2002/03, peaking to 180 in 2003/04 and 2005/06 before dropping back to 150 in 2006/07.

Economy – Distilleries - Today there are 52 distilleries on Speyside representing 50% of the total in Scotland and two thirds of all the malt whisky distilleries in Scotland.

Economy - Environment - Over 10% of the Moray area is located within the Cairngorms National Park, Britain's largest national Park, covering 3,800 sq km. This makes it 40% larger than the Lake District and twice the size of Loch Lomond and the Trossachs. Located within Moray is the famous Speyside Way, which attracts thousands of visitors year on year. The new Speyside Way Centre opened in 2005 acts as a gateway into the Cairngorms National Park providing a wealth of information about the Speyside Way and the surrounding area. Walking is the most popular active pursuit undertaken by visitors to the Cairngorms and the new facility will help to inform and inspire all those who venture along the Spey.

Economy - Food/Drink - Food and drink is an important sector in the region, the GVA of this sector is some £166 million. The region houses a number of international whisky brands. Diageo, the world's leading premium drinks company, are to invest

£100 million expanding its Scotch Whisky operations in Scotland. Around £40 million is earmarked for expanding its capacity for malt distilling and grain distilling through the building of a new malt distillery at Roseisle in Moray. The significant investment highlights the continuing long-term growth and sustainability of the Scotch Whisky business, a huge boost for the Moray economy.

Economy - GVA - Moray's Gross Value Added (GVA) at current prices was £1.3bn in 2004. At £14,000, GVA per head is 90% of the Scottish average. Since 1993 output per resident has been on average 15% below the Scottish output and 19% below the UK. In addition to these major sectors, the 'other' sector grew fivefold, driven by recreational services (such as leisure centres and winter recreation). The only sector to show a decline in real terms was utilities.

Economy – Industrial Sites - The Council is the main provider of industrial sites and premises to let in Moray. At 31 March 2008 113 serviced industrial sites totaling 20.55 hectares had been leased to businesses. 129 of the Council's 130 industrial premises were occupied representing 98.9% of the total floor area of 27,576 square metres. With the present high levels of occupation the supply of properties available to meet the demands of new and incoming businesses is restricted.

Economy - Job Related Training - For those in employment, data from Scottish Neighbourhood Statistics suggests that, in Moray, the percentage of all employees who received job related training in the 3 months prior to interview fell from 34% in 2004 to 26% in 2006. During this period the Scottish rate also decreased but to a lesser extent from 31% in 2004 to 30% in 2006.

Economy – Job Related Training - Moray College in academic year 2007-8 had approximately 7,800 enrolments including a number in HIE Moray target sectors with 1,500 in knowledge economy related activities (IT and computing), 420 engineering and 260 tourism/hospitality.

Economy - Job Related Training - Highlands and Islands Enterprise (HIE) Moray, Business Research report, published in July 2007 concluded that most organisations were undertaking some form of formal, as distinct from on-the job training. In most cases this was driven by regulation, achieving industry or customer standards, or related to operating machinery. The level of awareness expressed by the majority of organisations had increased in relation to the benefits of training and that most employment was semi-skilled or skilled and there were few unskilled jobs reported.

Economy - Mental Health - 10% of the Moray Council workforce sickness absence is due to stress and /or depression. 9% of the Moray GDP is affected by the impact of mental health on the workforce locally.

Economy - Migrants - Polish migrant workers in Moray accounted for 49% of National Insurance Number registrations in 2005/06. By the end of 2006 Moray had experienced a 6-fold increase in migrant workers in the period from 2002.

Economy - Tourism - Over half of visitors to the Moray area are aged over 55 and family reasons are often cited as a reason for visiting, although specific attractions and scenery also bring visitors to the area. Visit Scotland describe Grampian, which includes Moray, as Scotland's Whisky and Castle Country. Based on the visitor numbers from 2005, nine out of the fifteen top visitor attractions in Moray were related to food and drink.

Economy - Transport - Freight movements to and from Moray involve road, rail and sea. The volume of lorries using key roads is adding to the pressure of almost 24,000 vehicles a day heading into Elgin on the A96 from the east and over 16,000 from the west. A further 9,800 journey in from the north and 6,200 from the south. Traffic volumes are 10% higher during the peak summer holiday season.

Economy - Transport - The majority of goods are currently moved by road. The average level of HGV traffic (5 day average) on the A95 (Ballindalloch) is 21% and A96 (Brodie) is 10% compared with the A77 (Kilmarnock) at 8%.

Economy – Wind Farms - Currently Moray hosts three operational wind farms (Paul's Hill, Cairn Uish and Findhorn) and with several proposed wind farms in the planning and application stages.

Economy - Young People – In 2008 HIE commissioned a project exploring the attitudes of the 15-30 age group to living, working and studying in the highlands & Islands. The study incorporated an on-line survey, a series of online focus groups and policy development workshops. This will enable HIE and local authorities to better understand the factors behind their migration choices both out of and into the HIE area, and to develop appropriate policy responses. The survey includes analysis of responses by racial group along with other equality strands, so that we can understand whether there are particular trends evidence in the responses of those from ethnic minority groups. Survey is due to be published shortly.

Economy - Young People - HIE, in 2006/07, reported that 44 young people were participating in Get Ready for Work, funded by the Enterprise Networks and delivered by local training providers its target group is young people between 16 and 17 years of age with additional support needs; 149 participated in mainstream Skillseekers Programme, targeting 16-19 year olds with Local Enterprise Companies having discretion to fund training for 18-25 year olds; 480 young people participated in the Modern Apprenticeships Programme, which were initially for 16-24 year olds, however the upper age limit was removed and in addition Local Enterprise Companies have discretion to fund Modern Apprenticeships of age 25 and above in sectors which it has identified as having national or regional economic importance. Participation in all programmes has increased from 2005/06 results.

Elderly - Care Home - The number of people 65+ residing in a Moray based Care Home has continued to decline since 2004/05. The number of occupied places has dropped year on year from 565 (2004/05) to 462 (2007/08). The number of people aged 18-64 in a Care Home has also dropped over the same period, from 111 to 66.

Elderly – Carers - The percentage of Moray's population that is providing at least 1hr of unpaid care per week is below that for Scotland, at about 8% compared with nearly 10%.

Elderly – Dementia - A vast amount of care for people with dementia is provided by informal carers, who compared with non-carers are more likely to take prescribed medication, visit their GP and report higher levels of stress and physical symptoms. Respite provision is a key issue for carers and people with dementia: only 27% of carers of people with dementia get a week's short break in a year.

Elderly - Falls - Over the last 3 fiscal years, the number of fall-related calls shows a marginally increasing trend, reflecting a rise in both male and female falls, although the trend for females is slightly steeper. An analysis of the age of those who have

fallen shows that the number of falls increases with age, those aged 60+yrs representing approximately 50% of all fall-related calls.

Elderly - Falls - The Grampian Falls Management project carried out in 2006 stated that 30% of the population aged 65 and over fall each year, increasing to 50% for those aged 85 and above. Population projections for Moray suggest that by 2011 there will be approximately 17,000 residents aged 65 and over, suggesting that 5,100 (30%) older people will have a fall. The project also indicates that falls account for 14% of emergency hospital admissions in this age group and 10% of falls result in serious injury, 5% of which are fractures. 90% of hip fractures result from a fall and in 2004/05, hip fractures cost NHS Grampian £6.5million. Fall-related hip fractures therefore cost approximately £5.85million.

Elderly – Home Care - In terms of Home Care total hours (464.1 as a rate of 1000 pop), Moray is ranked 17 out of 32 authorities. This shows a steady but small and slow increase through the years (05/06, 06/07, 07/08). This indicates that the provision of home care has increased as the older population has increased but to no significant degree.

Elderly – Home Care - Moray has 596 care home places in 17 facilities plus 108 community hospital beds. Around 330 people are diagnosed with dementia each year. In 2007 there were reported to be 300 people with dementia in care homes in Moray, but this may be an underestimate.

Elderly – Home Care - In terms of home care clients aged 65 plus receiving care at weekends as a % of clients, this once again shows a steady increase from 40.6 in 05/06, to 46.3 in 06/07 to 51.1 in 07/08. Moray is nevertheless ranked 28 out of 32 authorities for this indicator. While all local authorities will be experiencing increasing dependency among their home care clients, Moray has not been as successful as other councils in providing services over 7 days. While Moray's growth in weekend care does confirm the increased dependency of clients it also illustrates that Moray should take steps to improve access to care at weekends.

Elderly – Home Care In relation to the number of home care clients aged 65 plus receiving personal care as a percentage of clients, Moray is ranked 19 out of 32 authorities. This also shows a similar pattern of steady but slow increase at 79% in 07/08 from 75% 06/07 and 71.2% in 05/06. This reveals that an increasing number of clients of Moray Council receive home care when they become known to the service and may also show an over reliance upon care at the expense of other service provisions.

Elderly - Homecare - The number of clients aged 65+ receiving personal care has risen from 773 (2005/06) to 879 (2007/08). This equates to 79% of all clients in 2007/08 receiving personal care, ranking Moray 19th out of the 32 Scottish Local Authorities. The level of weekend homecare has also increased over the same period from 441 to 568, however Moray were ranked a lowly 28th (2007/08) out all Local Authorities with 51.1% clients receiving weekend homecare. The number receiving evening/overnight care has slightly decreased overall from 362 to 354 over the same period, with Moray ranked 15th of all Local Authorities in 2007/08.

Elderly - Homecare - The number of people 65 and over receiving homecare has remained relatively static since 2005/06 with a slight increase from 1,086 (2005/06) to 1,112 (2007/08). The number of homecare hours provided has steadily increased since 2005/06, with Moray ranking 17th with 464.1 homecare hours provided per 1,000 population aged 65 and over in 2007/08.

Elderly - Hospital Admissions - The Moray rate of multiple admissions as emergency to acute specialities has remained static since 2004/05, which is against the national trend of a steady increase over the same period. However, the figures for the number of emergency hospital admissions for those aged 65 and over have increased gradually since 2004/05, which is in line with national data.

Elderly - Hospital Discharges - Moray has a high rate of delayed discharges from hospital (figures vary between 62% and 92% of discharges delayed for the periods 2004-05 to 2006-07).

Employment - Active - The working age population accounts for approximately 61% of the total population of Moray and just over 83% of the working-age population are economically active (June 2008). 81% of the working-age population are in employment, 10% of whom are self-employed. Almost ¾ of employee jobs are in the service industry, a further 15% are in manufacturing and 7% are in construction. 9% of employee jobs are tourism-related but this includes jobs that are also part of the services industry.

Employment - Inactive - Of the working-age population that is economically inactive, around two out of three report not wanting a job. In June 2008, 900 or 14% of key benefit claimants were claiming job seekers allowance as their main benefit. However, the most common main benefit is incapacity benefit, claimed by 3,370 or 54% of key benefit claimants.

Employment - Levels of out-commuting are relatively high, some 16% of residents out-commute. Two-thirds of those traveling out of the region work in Aberdeen and Aberdeenshire, a significant proportion in oil and gas-related fields, and out-commuters earn significantly more than local workers. There are also important work and income flows, with a sixth of the working population traveling to the relatively stronger economies of Aberdeen and Inverness in particular, and with significant industrial specialisation especially vis-à-vis Inverness and Nairn.

Employment – Public Sector - 21% of the economy is reliant on the two RAF bases and the recent threat of reductions in personnel highlighted the major impact that it would have. Highlands and Islands Enterprise (HIE) have carried out two previous studies to assess the impact RAF Kinloss and RAF Lossiemouth have on the wider Moray Community. The first, completed in 1994, estimated that both bases together generated about £18.6 million in income (in the 1993/94 financial year) for civilian residents of Moray. By 2003, an estimated £93.2 million was injected annually into the Moray economy, of which £27.6 million accrued to local residents.

Employment - Working Age - In 2006, Moray had a working age population of 52,900, 60.9% of its total population. Mid-2006 population estimates suggest that 20% of the population of Moray is of pensionable age. This translates as 17,746 people of pensionable age. 2006-based population projections, suggest that the pensionable population will increase by 10%. This would mean 2011 population numbers of 19,521 of pensionable age. These changes will mean that the proportion of the population that is of pensionable age will increase by around 2% from approximately 20% to nearly 22%. Around 63% of the pensionable age group is female.

Energy Consumption - In global terms, Scotland is a high energy consumer and demand is growing. In the 10 years to 2002 the demand has risen by 9% and the

Scottish House Conditions Survey (2006) shows that Scotland's housing exhibits poor or moderate levels of thermal efficiency and high levels of fuel consumption.

Energy Consumption – Commercial - It is evident that the Moray commercial and industrial sector is heavily reliant on gas to power its operations. By 2006 Moray was the biggest user of gas (sales per consumer) out of all Scottish local authorities with an average consumption of 2,663,630 KWh, just under 100,000 KWh more than North Ayrshire (2nd highest gas consumer) and over 250% greater than the Scottish average of 752,127 KWh. The exceptional reason for the significantly high gas consumption rate could be linked to the large number of whisky distilleries located in Moray. Gas is the main power source for the 52 distilleries in Speyside.

Energy Consumption – Commercial - Respondents who indicated that their employer monitored energy use (32%) were the most likely to give their employer a positive overall energy efficiency rating. In particular, more than three quarters of these gave a positive rating (77%), compared to fewer than half of those reporting that their employer recycles paper.

Energy Consumption - Domestic - Moray has a relatively high level of energy consumption for domestic use compared to other Scottish local authorities. In 2006 Moray was the 10th biggest consumer of gas for sales per consumer in Scotland, and the 12th largest consumer of electricity for sales per consumer during the same period.

Energy Consumption - Domestic - While the level of gas consumption in Moray has decreased by 3.5% from 2003 to 2006, compared to a national reduction of 6.5%, Moray consumption continues to remain above the national average by over 4% since 2004. In 2006 Moray used around 20,081 KWh gas per consumer, 4.3% above the national figure of 19,245 KWh.

Energy Consumption - Domestic - The domestic consumption of electricity reflects similarly with gas consumption, with Moray residents consuming above the national average. Moray has consumed on average between 6 to 7.5% above the Scottish average since 2003, although Moray has reduced consumption by 8% from 2003 to 2006 compared to a 7% reduction nationally. In 2006 Moray used around 4,776 KWh of electricity per consumer, 6.3% above the national figure of 4,494 KWh.

Energy - Efficiency - The Scottish Government requires local authorities to develop strategies which will achieve an improvement in energy efficiency in housing by 2010. By 2001 The Moray Council had achieved an improvement of 8% with a target of 30%. Achievement by 2005 was 16.89%.

Energy - Efficiency - The major barrier to installing energy saving measures was the likely cost of introducing the measures. 87% (net rating) of respondents regard cost as the biggest barrier. A lack of awareness of grants or help available to install energy saving measures was also identified as an important barrier (+65% net rating), as was grants not being available or respondents not being eligible for assistance (55%). Clearly those are significant issues in light of respondents rating the cost of introducing measures as the most important barrier. A lack of awareness of the measures available was also identified as a significant barrier, with a net rating of +58%.

Energy - Efficiency - Analysis of the NHER data shows that there is a marked difference in the energy efficiency of social and private sector housing stock in Moray. The council housing stock actually has an average NHER rating of 6.7, well

above the overall rating of 5.6. The high NHER rating has been achieved through programmes of insulation, draught proofing, heating replacements and other related efficiency measures which have been installed through the Moray Care & Repair scheme, operated by Castlehill Housing Association in partnership with the council.

Energy - Efficiency - Breaking down the NHER scores Moray has a greater number of houses in the moderate (3 – 6) range with 55% compared to a national average of 51%. However Moray has a higher level of houses in the poor energy rating with almost 8% against the national figure around 5%, and Moray performs below the national average of houses classed as having good energy efficiency with just under 40% compared to the national average of 44%.

Energy - Efficiency - Over the period 2003 to 2006 Moray lagged behind the Scotland average in the NHER scale with a mean rating of 5.6 compared to the national average of 5.9. This placed Moray as 23rd out of the 32 local authorities on energy efficiency in the home.

Energy Efficiency – Council Housing - It is evident that the major contributor to the housing energy reductions is the councils' own stock, where Capital and Planned Maintenance Programmes have realised direct reductions of over 42% in energy use, and 44% in CO2 emissions since 1997. Other residential sectors have also shown improvements over the period; however it is clear that less progress has been made due in the main to other sectors requirement to self fund the installation of energy saving measures. There has been an overall reduction in energy use of 20.58%, 3.42% below the agreed target of 24% set with the Scottish Executive.

Energy - Savings - The key motivating factor for installing energy saving measures was to reduce home energy costs. 96% of respondents regarded reducing energy costs as either very important (83%) or fairly important (13%). Only 28% of respondents noted environmental concerns as a very important reason to install energy saving measures, while 51% regarded it as a fairly important reason. 18% of respondents actually saw environmental concerns as fairly unimportant or 'not important at all' when considering energy saving measures.

Energy - Social Economy - Moray Bio-Energy Centre is a Social Enterprise, recently set up to provide educational and research facilities in the production of renewable energy, using locally sourced products from Farm and Forestry for Community groups, as well as assisting in reducing fuel poverty.

Energy - Savings - The Moray Council have set in place various energy saving measures throughout council buildings in a bid to meet its 'Carbon Reduction Commitment' in cutting carbon emissions and reducing energy costs. The council have introduced a number of energy saving measures aided by funding through the Central Energy Efficiency Fund (CEEF) and the Spend to Save fund. Since September 2005 almost £200,000 has been spent on projects, with anticipated efficiency savings of £60,000 per annum through the new measures. A further £300,000 has been earmarked for future council projects that will yield further cost savings and reduce carbon emissions. Projects vary in size from timer controllers on drinks machines to the installation of Building Energy Management Systems at the large sites.

Energy - Savings - Under the Carbon Reduction Commitment the council is required to report on the electricity consumption for buildings where half-hourly electricity meters are required. If the council meets or exceeds the consumption threshold of 6,000 MWh (of electricity), it will be required to report on the total energy use

emissions, except transport (i.e. all electricity, gas, other fuels). Therefore there is an incentive to have an energy consumption that is below 6,000 MWh threshold. If the Council were to exceed the target at the end of 2008 there may be significant financial repercussions for the council.

Environment - The Cairngorm Mountain National Scenic Area is one of 40 in Scotland which are nationally important areas of outstanding natural beauty and the Cairngorms represents one of Scotland's best examples of mountains and lochs landscapes. The Cairngorms National Park became operational in September 2003 and is Scotland's second National Park and the largest in Britain.

Environment - The Council serve Tree Preservation Orders (TPOs) on potentially vulnerable trees which are of significant amenity value to the community as a whole, or trees of significant biodiversity value. Currently there are 31 TPOs in place, which are reviewed and served on a continual basis.

Environment - The Council signed the Scottish Local Authority Climate Change Declaration in January 2007 and in doing so committed to provide a Climate Change Action Plan to achieve significant reductions in greenhouse gas emissions. Furthermore identify and prepare adaptation plans for services to address the anticipated impacts of climate change. The preparation of the plan is ongoing with community planning considering the most efficient means for delivery of forthcoming actions and outcomes.

Environment - The national cleanliness indicator in which Moray was top from 2004 to 2006 and remains in the top quartile. There was a drop in scores during 2006/07 however levels in 2007/08 are back to previous standards, although the ranking will not be available until December 2008.

Environment - Under the Litter Code of Practice and the Local Environmental Audit Management System (LEAMS), the Council has a statutory duty to keep roads, footpaths and public open spaces free from litter and must conform to the standards and response times set therein. The LEAMS allows for direct comparison with other authorities with Moray being ranked 6th equal with six other authorities in 2006/07.

Environment - Economy - The major annual environment event in Moray is the Moray Environment Festival which was first held in the Elgin Town Hall in 2007, attracting a large attendance of over 600 people. The festival, organised by Moray Council, targeted businesses and residents throughout the area.

Environment - Sites - Moray's natural and built heritage includes 2,681 archaeological sites, 79 scheduled monuments, 1665 listed buildings, 17 conservation areas, 7 historical gardens and designed landscapes (1.4% of Moray area), 1 local nature reserve, the Speyside Way Long distance route, 2 Ramsar sites, 39 sites of special scientific interest (SSSI) (9.8% of Moray area), 10 special areas of conservation and 4 special protection areas. Also significant to Moray is the Cairngorm National Park, of which 17% is located within the Moray boundary and plays an important role in the Moray environment.

Environment - Social Enterprise - The Rural Environmental Action Project (REAP) is a local sustainable development charity based in Keith. The group administer the Moray Community Grants Programme on behalf of HIE Moray. During 2007/08 funds were approved for 15 Community Projects including 6 environment-related projects. These include feasibility studies for Strathbogie and Cabrach trails; a

footpath development between Keith and Huntly; Moray Wildlife on the Move; and photovoltaic panels for the roof of the Moray Arts Centre.

Environment - Vehicles - The Council have completed a successful trial converting two vehicles, one being an 18 ton kerbside lorry, to run on cooking oil from Moray Schools. This has proved financially viable as well as environmentally friendly. School kitchens in Moray use around 200 litres of cooking oil every month and the waste was previously taken south by tanker for reprocessing along with oil from schools and restaurants throughout the north and north-east. Future plans to convert further fleet vehicles would help to reduce the CO2 emissions from the council vehicles which was estimated to have been over 3.5 million (kg) of CO2 during 2007.

Ethnic Minorities - Since the collation of the census, there has been a significant increase in the numbers of residents in ethnic minority groups. The General Register Office for Scotland highlighted that a net figure of 2,900 migrants (from the UK and abroad) entered Moray between July 2001 and June 2006. This amounted to approximately 3.3% of Moray's population. Moray had an increase of 215% of migrant workers, although this is below the national average of 282% for Scotland.

Ethnic Minorities - The 2001 census indicated that less than 1% of the population in Moray belonged to an ethnic minority group. The most predominant ethnic minority groups were Chinese, those of a mixed background and Pakistani, accounting for 20%, 20% and 16% of the ethnic minority population respectively. In Scotland as a whole, 2% of the population belong to an ethnic minority group, by far the most predominant being Pakistani, accounting for 31% of the ethnic minorities in Scotland. Chinese and those of a mixed background accounted for 16% and 12.5% respectively, of those from an ethnic minority group.

Ethnic Minorities - The 'language barrier' is the most consistently cited problem facing migrant workers and service providers. It is a major barrier to accessing services generally. Demands for translation and interpretation services increased to 71 foreign translations, 11 foreign interpretations and 44 calls to language line in 2006-7.

Ethnic Minorities – Migrants' Community - With the increase in migrant workers many public agencies have made efforts to integrate the migrant workers into the communities. The Moray Council, Highlands and Islands Enterprise and the European Social Fund held a Polish-Scottish party in Buckie to launch the Welcome to Moray Pack in September 2005. This was very well attended by both Scottish and Polish residents, with Polish food and music supplied by the Polish community. In December 2006 the Local Community Network funded the Moray Polish: Scottish Association Christmas party. This was held to celebrate Mikolaj (Santa) Day and helped bring Polish families together for the festive period. Grampian Police led a multi agency information event on site of a local business employing large number of migrant workers. The event attracted 70 migrant workers who were provided with local information on well-being and safety as well as an opportunity to make contact with many public organisations.

Ethnic Minorities - Migrants' Community - The Moray Council along with local businesses funded the Chinese Lion Dance in January 2007 to celebrate Chinese New Year. This event recognised the importance of the long-established Chinese community in Moray, which stands at around 250 residents. A DVD of the event was produced and viewed at the Chinese consultation event organised by the Council.

Ethnic Minorities – Migrants' Language - Recently the Council has introduced a course designed to help Polish migrants widen their English vocabulary. The

Community Learning and Sports Development teams have joined forces to run language and sports classes especially for Polish families who have moved to the area. The pilot scheme involves members learning and discussing a chosen sport and its rules, before playing the sport as a family and learning their new vocabulary as they go along.

Exclusions - Gender - Nationally, overall, male pupils accounted for 78% of temporary exclusions, the same as 2005/06. In Moray, male pupils accounted for 83% of temporary exclusions, a slight increase from 81% in 2005/06.

Exclusions - Primary - Between 2003/04 and 2005/06, the rate of exclusions in Moray's primary schools has remained fairly constant at 12 per 1000 pupils. In Moray's secondary schools, the rate has increased slightly from 59 per 1000 pupils in 2003/04 to 67 per 1000 in 2005/06, although this is lower than in 2004/05. The vast majority of exclusions were temporary, with only around 6 pupils being removed from the register in each of the last 3 years, which represents about 1% of total exclusions.

Exclusions - Primary - Nationally, 13% of the total exclusions were from local authority primary schools, equivalent to 16 exclusions per 1,000 pupils. In Moray, 17% of the total exclusions were from primary schools, an equivalent of 12 exclusions per 1,000 pupils, a 2% decrease from exclusions in 2005/06. 48% of all temporary exclusions occurred in P7.

Exclusions - Secondary - Nationally, 84% of the total exclusions were from local authority secondary schools, equivalent to 120 exclusions per 1,000 pupils. Exclusion rates peaked during S3, with 204 exclusions per 1,000 pupils, a 4% increase from exclusions on 2005/06. In Moray, 83% of the total exclusions were from secondary schools, an equivalent to 69 exclusions per 1,000 pupils, a 2% increase from exclusions in 2005/06. Temporary exclusions percentage rates peaked with 32% of all temporary exclusions occurring in S3 and 27% in S2.

Exclusions - Secondary - The exclusion rate in secondary schools was about 67 per 1000 pupils in 2005/06, the majority of which were temporary with only 6 pupils being removed from the register, accounting for about 1% of total exclusions.

Exclusions - There were 44,794 exclusions from local authority schools in Scotland, an increase of 4% from 2005/06 and a continual increase from 2002/03. About 22,800 different pupils (3% of pupils) were excluded during the year. In Moray, there was a slight increase in the total number of exclusions from 491 in 2005/06 to 496 in 2006/07, mirroring increasing national and comparator authority trends. 294 different pupils in Moray schools (2% of pupils) were excluded during the year. According to published results, Moray is the 9th lowest excluding authority in Scotland in terms of exclusions per 1,000 pupils.

Exclusions -Temporary - Over 99% of all exclusions both nationally and in Moray were temporary. In Moray, there were 2 removals from the register and in both cases alternative educational arrangements were made.

Festivals - There are a number of significant Music and Folk Festivals in Moray each year. For example, the Moray Music Festival is held every two years over a 10 day period and provides an opportunity to compete in music, dance, speech and drama for both adults and children. In 2007 it attracted 782 of which 35 were for duets/duologues, 603 individuals and 144 groups. In addition to classical instruments and groups, there are also categories for Scottish Country Dancing,

Ceildh Dancing, Scots fiddle, Scottish Choric Verse and Bag Pipes. Other traditional and folk music festivals held annually that attract large numbers include the Speyfest (Fochabers) and the Keith Folk festival organised by the Traditional Music and Song Association.

Fire Safety - Housing - The number of home fire safety visits increased dramatically in the 3rd quarter of 2006/07, from 52 in the previous quarter to 229, and has remained at 190+ per quarter since. The increase was a result of concerted efforts to roll out the initiative across all fire stations in Moray.

Fires - Housing - Between 2004/05 and 2006/07, the number of accidental fires displays a marginally increasing trend, reflecting a slightly increasing trend in accidental dwelling fires and a marginally reducing trend in accidental secondary fires. A little over half of accidental fires are in dwellings, the remainder being secondary fires.

Fires - Housing - Despite the slightly increasing trend in accidental dwelling fires, the total number of dwelling fires has marginally reduced over the last 3 years. This is due to a fall in the occurrence of non-accidental dwelling fires, from 17 in 2004/05 to 4 in 2006/07 (2005/06 suffered 29).

Fires - Housing - In 2005/06, the number of incidents resulting in casualties was nearly twice that in 2004/05, reflecting a large increase in the number of incidents in quarters 3 and 4. Looking at figures for deliberate primary fires, all secondary fires and dwelling fires suggests that this increase may come from deliberate secondary fires, which showed the greatest number increase over this period, of 17.

Fires - Housing - The number of incidents resulting in casualties is low but has increased slightly over the last 3 years. In 2004/05, 10 incidents resulted in casualties, rising to 13 in 2006/07, a drop of 6 from the previous year. However, the number of fatal and non-fatal casualties was the same in 2006/07 as in 2004/05 at 13, although 2005/06 saw a sharp upswing to 21.

Fires - Housing - The total number of deliberate fires also shows a reducing trend over the same period, despite a 30% increase in 2005/06, reflecting a reducing trend in both deliberate primary and deliberate secondary fires. Each year deliberate secondary fires represent approximately 84% of all deliberate fires.

Fires - Housing - The total number of fires recorded by Grampian Fire and Rescue Services (GFRS) for Moray between 2004/05 and 2006/07 shows an overall downward trend. Total fires includes: deliberate primary and secondary fires and accidental dwelling and secondary fires. By far the most prolific category of fire is deliberate secondary fires, accounting for on average 58% of total fires.

Fires - Young People - The number of wilful fires reported to Grampian Police shows a reducing trend over the last 2½ years. The times when there are most fires coincide with school holidays, at Easter (Qtr 1) and summer (Qtr 2).

Flood Alleviation - Economic development - There is a shortage of available land and premises for business start-ups, and for businesses displaced by FASs.

Flood Alleviation - Schemes - Flood alleviation schemes are essential to prevent or deal with future high water levels. The council have put in place Flood Alleviation Schemes (FASs) for the main communities affected by flooding. Good progress has been made on the Forres (Burn of Mosset) and Rothes schemes, with construction

underway. However both the Elgin and Forres (River Findhorn and Pilmuir) schemes have attracted objections at the planning and Flood Prevention Order stage. This will most likely lead to delays in construction starts.

Flood Alleviation - Schemes - The following schemes have been identified as priority, current progress is also shown: Lhanbryde FAS is complete and operational; Elgin FAS due to commence construction Mid 2010 with completion due Mid 2013; Forres (Burn of Mosset) FAS is under construction and for completion by October 2009; Forres (Findhorn & Pilmuir) FAS due to commence construction February 2009; Rothes FAS due to have construction complete by December 2010.

Flood - Damage - Moray has been subjected to a series of major flooding incidents since local government re-organisation in 1996. Major damage has occurred in the communities of Elgin, Lhanbryde, Forres and Rothes. There is currently commitment to providing alleviation schemes in Elgin, Rothes, Lhanbryde and Forres.

Flood – Predictions - It is estimated that by 2100 winters will be up to 30% wetter in some places, while summers will be up to 50% drier. In the nearer future it is predicted that by 2020 winters along the east coast will be up to 10% wetter than present. Such precipitation changes will have several implications for Scotland and Moray in particular, affecting water resources, causing further flooding and drought risks, and habitat destruction.

Forest - The Forest area of Moray equates to 64,352 hectares, which represents 28% of total land area in Moray. This compares to 15% for Scotland. Moray forest area percentage is twice the Scottish average and 2.5 times UK average. Moray Forest District manages Forestry Commission Scotland forests from Culbin in the west through to Aultmore by Keith in the east and southwards down to Glenfiddich and around Grantown – an area of around 23,000 hectares of land. Local timber processing and links between forestry and tourism offer potential for diversification. The forest also has a significant role to play in tourism, as a destination in itself, a setting for leisure activities, and for the impact it has in creating an attractive landscape in some parts of the region.

Fuel Poverty - Fuel Poverty in Moray is 21% in comparison to Scotland at 13%. Moray has a higher level of fuel poverty than Scotland, with an estimated 27% of households in fuel poverty, compared with 19% in Scotland as a whole. Although fuel poverty is closely related to income - the likelihood of experiencing fuel poverty increases as household income decreases – there are several other factors that contribute to the incidence of fuel poverty. These include the age and type of dwelling, household composition, tenure, the energy efficiency of a building and the rurality of a dwelling. More likely to experience fuel poverty are households living in older and detached dwellings, older smaller and single pensioner households, those in the private sector, those with lower energy efficiency and those in rural areas.

Fuel Poverty - The proportion of Moray's housing stock that is pre-1919 is approximately 10% larger than for Scotland as a whole [SHCS] and 36% of Moray's dwellings are detached, compared with 20% of Scotland's. Moray has a slightly larger proportion of older smaller and single pensioner households than Scotland, 30% compared with 28%, there is a larger proportion of private sector housing in Moray, at around 78%, compared with 73% in Scotland as a whole and 8% of Moray's housing stock received a 'poor' National Home Energy Rating (NHER) for 2003-2006, compared with 5% for Scotland. The proportion of housing stock that

received a 'good' NHER rating was 6% lower in Moray than in Scotland [SHCS]. Finally, 44.1% of Moray is categorised as rural according to the Scottish Government 8-fold Urban Rural classification, compared with just 18.2% of Scotland as a whole [SG Urban Rural Classification, 2007/08].

Health - Birthweight - Provisional statistics report that for the year ended 31st March 2007 in Grampian 6.96% (409) of all births were of a low birthweight, against a Scottish average of 7.15% (3,956). Results differ only slightly from those a decade ago, as at March 1997, in Grampian 6.3% of births were of a low birthweight against a Scottish average of 7.2% for the same period. Statistics at a Moray level are not available.

Health - Deaths - The standardised death rate in Moray is 10.5 per 1,000 population. The main cause of death in Moray, in both genders, is diseases of the circulatory system, which accounted for approximately 1/3 of all deaths in 2006. The next most common cause of death is cancer, which accounted for around ¼ of all deaths in 2006. The SIMD identifies just 1 data zone, 0.9% of the total in Moray that is within the 15% most health deprived; this is in Elgin.

Health - Dental - There is a high rate of dental decay in Moray, which is compounded by difficulties, which the area has in attracting dentists. As at September 2007, dental registration for children in Moray was 52.3%, well below the national average of 69.9%.

Health - Immunisations - Moray has a slightly higher immunisation uptake at 24 months – MMR at 91% compared to the national figures of 90.3%. However the immunisation uptake at 24 months – all excluding MMR was well below the national average at 90.6% compared to the national figure of 96%.

Health - Obesity - The number of patients aged 16 and over recorded with a BMI greater than or equal to 30 in the previous 15 months is significantly higher (9.34%) in Moray than Grampian (8.63%) and the Scotland as a whole (7.34%). Out of the 40 Community Health Partnerships in Scotland, Moray ranks 35th in terms of obesity prevalence.

Health – Sports - However, SportScotland participation figures for 2003-06 actually reflects that the Moray adult population on average participate more regularly in physical activities compared to the Scottish average. Weekly and monthly participation rates for adults in Moray were 46% and 59%, compared with national figures of 33% and 46% respectively. When also including walking 2+ miles as a physical activity Moray participation levels were 62% for weekly and 72% for monthly participation, compared with national rates of 46% and 59% respectively. Further, Moray was ranked 2nd for the number of users (per 1,000) of swimming pools in Scotland for 2006/07. There were 5,566 attendances (per 1,000), 60% higher than the national average of 3,476.

Health - Weight - A recent local health needs assessment exercise in Moray recorded that 35% of 12 year olds are overweight while 76% of women and 60% of men are not active enough for health. In Grampian around 35% of boys and 30% of girls aged 2-15 can be classified as overweight or obese compared with 34.6% of boys and 30% of girls nationally. The Youth Lifestyle survey revealed that 51% of males were physically active on 5-7 days, 18% more than females, whereas 56% of females were physically active 2-4 days per week, 15% more than males.

Health - Weight - Obesity prevalence figures from Moray GP practices for patients aged 16yrs and over show a contrasting picture. The number of patients aged 16 and over recorded with a BMI greater than or equal to 30 in the past 15 months is significantly higher (9.34%) in Moray than Grampian (8.63%) and the Scotland as a whole (7.34%). Out of the 40 Community Health Partnerships in Scotland, Moray ranks 35th in terms of obesity prevalence.

Health - Weight - Overweight and obesity is rapidly increasing in children and adults in Scotland. Obesity has increased in Scotland over the past two decades, reaching 22% in men and 24% in women in 2003. About 60% of the population aged 16 and over are overweight or obese. There is increasing concern over the levels of obesity among Scottish children. Being overweight or obese carries a high risk of many chronic conditions, including diabetes, high blood pressure, stroke and coronary heart disease. Obesity can reduce life expectancy by between 3-13 years.

Health - Weight - In Grampian around 35% of boys and 30% of girls aged 2-15 can be classified as overweight or obese compared to 34.6% of boys and 30% of girls aged 2-15 can be classified as overweight or obese in Scotland.

Heritage and Ancestral - Services - The Local Heritage Service attracts more than 5,000 visitors and 6,000 enquiries annually. Libindx, an online index of over 2.5 million entries gives a unique and highly regarded record of people, places and subjects of Moray - and is supported by more than 20 volunteers. Heritage and Ancestral - usage - The current level of ancestral tourism in Moray is difficult to estimate but a volume of 39,000 visitors and £4.85million expenditure may be a good working assumption.

Homelessness - The percentage of Council relets to homeless households has steadily increased, reaching 48% in 2007/08. In June 2008, the Council agreed an Interim Allocations Policy which set a target of 60% (+/-5%) of lets to homeless households. There are approximately 180 applicants on the Council's Homeless Priority List as at December 2008. A consequence of the increasing homelessness duties is additional pressure on temporary accommodation for homeless households. In 2008, the Council's consultants identified that an increase of 200 units of temporary accommodation would be required over the next 7 years. The Council is unlikely to meet the Scottish Government's 2012 target, as a result of the acute shortage of affordable housing in Moray.

Housing - Carers - 6% of Moray's households contain 2 or more residents with LLTI, 59% of which do not include a carer. 27% have one carer and the remaining 14% have 2 or more carers. Of the households with 1 carer, around 26% of carers either work or study.

Housing - Carers - Approximately 25% of Moray's households have one resident with a LLTI, 81% of which do not include a carer. Around 13% of households have one carer, the remaining 6% having 2 or more carers. Of those with one carer, there is a 50/50 split between those carers who work or study and those who do not. However, this division varies with the age of the LLTI sufferer. Of those households with one resident with a LLTI aged under 60yrs and 1 carer, approximately 65% of carers work or study. This figure drops to 44% when the LLTI sufferer is aged 60-64yrs and 25% when aged 65-74yrs, rising again to 40% for LLTI sufferers aged 75yrs and over. These figures suggest that older LLTI sufferers have older carers, hence the lower proportions who work or study. The increase in the carers who work or study for LLTI sufferers aged 75yrs and over, may indicate that they are now being cared for by younger carers

Housing - Health - Across all tenures, those aged 65-84yrs represent the largest proportion of those with a limiting long-term illness.

Housing - Health - The rate of limiting long-term illness is higher among occupants of social rented accommodation, at 24%, than for occupants of owned or privately rented/rent free accommodation, at 14%. However, across all tenures, those aged 65-84yrs represent the largest proportion of those with a limiting long-term illness.

Housing - Health - The relationship between health and tenure indicates that 88% of occupants of social rented accommodation report good or fairly good health compared with 94% of occupants of owned or privately rented/rent free accommodation. This is reflected in the incidence of limiting long-term illness, which is 10% higher for occupants of social rented accommodation, at 24%, than for occupants of owned or privately rented/rent free accommodation. The spread across age groups is comparable, with 65-84yr olds representing the largest proportion of each tenure type having a long-term illness.

Housing - Health - The statistics for Scotland indicate a very similar picture to Moray. There is a slight increase in the proportions of people reporting “not good health” as socio-economic status reduces, with the exception of those aged 16-34yrs. In every age group, the “never worked and long-term unemployed” category, displays a considerably greater proportion of people report “not good health”.

Housing - Health - There is no difference in the proportions of Moray residents with and without a LLTI living in accommodation of which the lowest floor level is 1st –4th. This is the same nationally. However, the proportion of Moray residents living in such accommodation is significantly lower than for Scotland as a whole. Approximately 6% of Moray’s population live in such accommodation compared with a national figure of nearly 20%.

Housing – Social Rented - In Moray, the percentage of social rented housing at 22% is significantly less than the Scottish average (27%). As at 1 April 2008, there were 2,955 applicants on the Council’s housing list – 2,396 waiting list applicants and 415 transfer applicants. In 2007/08, 499 Council/RSL properties (336 Council; 154 RSL) were let to applicants on the Council’s Housing List. The number of Council relets has decreased by 38% since 2000/01.

Housing – Land - There is sufficient land identified for housing development in the Local Plan 2008 although current ownership and planning constraints due to flooding etc. mean that the Council’s Strategic Housing Investment Plan 2009-15 relies in future years on affordable housing contributions achieved through planning conditions. The Council is currently reviewing its Affordable Housing Supplementary Guidance to Developers and in February/March 2009 a consultation is being undertaken on a proposed increase from 20% to 25% for developments of 10 or more houses. The Council has identified that it is financially feasible for it to pursue a limited Council new build programme of around 80-90 properties over the next three years. The Council has submitted a bid for Scottish Government resources to assist in the funding of a Council new build programme to deliver 80 new Council houses over the next 3 years.

Housing - Listed Buildings - The Moray Council has one of the highest concentrations of Listed Buildings in Scotland. At April 2007 Moray had 1665 listed buildings and 17 conservation areas. Collectively, this heritage contributes greatly to the Moray character and provides a sense of place.

Housing - Neighbour Disputes - The number of neighbourhood disputes being reported throughout Moray has increased steadily over the last year following a sharp drop in quarter 3 of 06/07, and there is a slight upward trend in the data over the last 18 months. Approximately 70% of respondents to the Community Safety Surveys in 2005 and 2007 did not think neighbour disputes were common in their area and the same number had not experienced any neighbour disputes in the previous 12 months. Complaints of this type are dealt with by the relevant housing provider of the alleged offender, with incidents in which the alleged offender is an owner/occupier being passed to the relevant Community Warden to be managed.

Housing - Neighbour Disputes - There have been a total of 68 referrals to SACRO Mediation Service over the last 2½ years. 17 have been successfully resolved through either full or shuttle mediation, in 21 cases one or both parties have been offered advice, guidance and assistance, 3 cases are ongoing, 11 are awaiting feedback and 16 were not progressed for a variety of reasons.

Housing - Quality - The quality of the social rented stock in Moray is good. The Council's housing stock has 67.3% compliance with the Scottish Quality Housing Standard as at September 2008 and is confident that it can meet the SHQS for its housing stock by 2015. In the private sector, approximately 455 properties fall below the Tolerable Standard. The Council continues to invest a substantial proportion of its Private Sector Housing Grant (PSHG) on Care and Repair and disabled adaptations to enable residents to continue to live in their own homes, thus reducing further pressure on resources to meet housing needs.

Housing - Supply - Despite a 100% rise in the mean house sale price in Moray, from £58,584 in 2001 to £117,417 in 2006, the number of house sales rose by 17%, from 1,899 to 2,215. The median house sale price in Moray nearly doubled, from £47,000 in 2001 to £93,000 in 2006. The median price being lower than the mean price is reflective of the large proportion of band A-C dwellings in Moray, approximately 70%. The proportion of dwellings in bands F-H is small in Moray at approximately 5%. Between 2003 and 2006, the proportion of dwellings in bands A-C fell slightly, while the proportion of dwellings in bands F-H rose slightly.

Housing - Supply - In 2007/08, Council housing stock stood at 5917, a reduction of 127 from the previous year. Of this, 34.32%, 2031 houses, failed the Scottish Housing Quality Standard, compared with 37.4%, 2282 houses, in 2006/07.

Housing – Tenure - In 2005/06 Moray housing tenure was 33% owned, 34% mortgaged, 18% rented from the Local Authority, 3% rented from Housing Authority, 10% were private rentals. 13% of dwellings are flats, 20% are terraced, 31% are semi-detached and 36% are detached. The percentage of social rented housing in Moray is 22% compared with a national average of 27%.

Housing - Type - According to a 2007 GROS report, 68% of dwellings are classified in council tax bands A – C, 26% are banded D – E, the remaining 6% falling into bands F – H. However, 13% of dwellings are flats, 20% are terraced, 31% are semi-detached and 36% are detached.

Leisure - Facilities - Moray has continually performed well below the national average with the number of people (per 1,000) attending indoor leisure facilities. However, only the Moray Leisure Centre attendances have been included prior to 2007/08 due to other facilities being unable to quantify attendances. The 2007/08 attendance figure (5,481) includes the number of attendees from other staffed Council

Community Education Centre as well as the Moray Leisure Centre, hence the 96% increase in attendances from 2006/07. While Moray was ranked 25th of the 32 local authorities in 2006/07, if the 2006/07 figures were replaced with the 2007/08 figures Moray would have ranked 8th.

Leisure - Facilities - Moray was ranked 2nd for the number of users (per 1,000) of swimming pools in Scotland for 2006/07. There were 5,566 attendances (per 1,000), 60% higher than the national average of 3,476. There is a slight drop for 2007/08 of 138, however Moray has continually out performed the national average over the last 3 years.

Leisure - Facilities - There is a shortage of sports and leisure facilities within Moray, particularly football pitches. Currently there are 73 football pitches, 13 hockey and 6 rugby fields in Moray (most of which are within school grounds).

Life Long Learning - Services - The percentage of the population making use of Learning Centres and Learning Access Points continues to rise in Moray with 16.5% making use of these facilities in 2006/07, above the national level of 10.7% and comparator average level of 10.9%.

Literacy - Need - Demand for adult literacy and numeracy has increased by 39% in 2006/07 for those in need who have asked for support. In 2007/08 the number of adults being supported through the Essential Skills programme was 188, just 1% of the estimated number in need. In the first quarter of 2008/09 the number has already reached 93 which shows a marked increase from the same period last year.

Literacy - Need - It is estimated that 23% of the adult population in Scotland have low levels of literacy. With an adult population in Moray at 69,940 this could possibly be as many as 15,791.

Looked After Children - Audit Scotland statutory performance indicators report that in 2006/07, in Moray, there were sixteen 16 or 17 year olds ceasing to be looked after. In 2007/08 there were fourteen.

Looked After Children - In 2006/07, results for those in Moray attaining at least one SCQF level 3 significantly improved from 2005/06 result of 57.1% whereas performance nationally decreased from 59.3%.

Looked After Children - In Moray, there were 193 children looked after as at March 2007, 1% of the 0-18 age group population, below the national average of 1.3%. 87% of children were looked after in a community setting and 13% in residential care, in line with national averages of 88% and 12%. For those children looked after away from home, 67% had been in placement for over one year, below the national average of 72%. 33% of Moray's children looked after away from home had been with 3 or more placements, above the national average of 29%.

Looked After Children - Of the care leavers in Moray in 2006/07, 53% had a pathway plan and 59% had a pathway co-ordinator. This compared with 50% and 55% nationally. 93% of Moray's care leavers were still in contact with social services, compared to 88% nationally. In addition, 40% of care leavers in Moray known to be economically active were in employment, education or training compared to 38% nationally.

Mental Health - Drugs - The Scottish Neighbourhood Survey estimated that in 2004 7.43% of the Moray population were prescribed drugs for mental health issues such

as anxiety, depression or psychosis. The national average for 2004 was slightly higher at 8.2%.

Mental health - Drugs -The Moray CHP Health Summary 2008 published by ScotPHO indicates that in 2006, 3,828 (4.4% total population) patients were prescribed drugs for anxiety/depression/psychosis. This compares with the national figure of 8.1%

Mental Health - Hospital Admissions - The number of people with a mental illness admitted to a specialist hospital in Moray has dropped over the last 4 years. The number of admissions has reduced by 20% from 387 admitted in 2004/05 to 309 in 2007/08. Breaking down the admission figures, the number of first time admissions has dropped by 30% while the number of re-admissions has dropped by 17% over the four years.

Mental Health - Hospital Discharges - The level of mental illness patients discharged from hospital reflects similarly to the admission figures, where Moray has seen a reduction of 17% from 2004/05 to 2007/08. While the majority of patients are discharged home, there has been a slight drop from 71% in 2004/05 to 68% in 2007/08. The number discharged to inpatient care has increased from 8% to 19%, while the number discharged to other NHS / private institution has decreased from 14% to 9%. The numbers who have died while in the hospital has decreased from 15 to 11 over the same period.

Mental Health – Young People - In the recent Youth Lifestyle survey, 87% of pupils who smoked they stated that they did so to calm their nerves and 54% stated that being or feeling less stressed would assist them to stop smoking. Pupils also identified that leading a less stressful life would help them to cut down on alcohol intake and the top reason for taking drugs is to help them relax. In relation to wellbeing, over a fifth, 22%, of young people never or rarely felt useful or relaxed with 21% never or rarely felt optimistic about the future. In fact only 37% of young people felt optimistic about the future often or all of the time. The next highest percentages for never or rarely was having energy to spare and feeling relaxed both 22%.

Mental Health- Prevalence - From a primary care perspective, Moray's GP prevalence of mental health, at 0.77, whilst lower than the Scottish average of 0.80, was higher than the Grampian average of 0.72.

Public Transport - As an alternative to car use, rail and bus services can be accessed though they are limited. There are typically 10 through trains in each direction on weekdays. In 2002/03 there were 325,876 rail journeys made to and from ScotRail stations in Moray, increasing to 405,082 rail journeys in 2006/07. Moray is served by an hourly bus service between Inverness and Aberdeen that connects communities along the A96. There is also an hourly service linking Inverness and Aberdeen along the Moray coast.

Public Transport - Of those for whom a car or a van was the usual main method of travel to work only 24% in Moray said they could use public transport to get them to work, well below the national average of 43%. 78% of residents surveyed said they had not used a bus in the last month, and 89% also said they had not used the train in the last month. Only 7% said they had actually used the bus to get to work, compared to a national average of 12%. Also none of those surveyed had used the train to travel to work, compared to a national figure of 4%. 63% had driven or been a car passenger to work, 6% said they cycled to work and 17% walked.

Religion -Non-Christian religions account for just 1% of those specifying a religion in the 2001 census. The most predominant of these are Islam and Buddhism, which account for 20% and 13.5% respectively of those practising non-Christian religions in Moray. The picture for Scotland as a whole is slightly different. Non-Christian religions account for 2% of those who specified a religion in the 2001 census, and although the most predominant non-Christian religions are the same, Islam accounts for a much larger proportion of those practising non-Christian religions, at 45%, while those practising Buddhism represent a smaller proportion, at 7%.

Road - Accidents - In Moray comparing the 2002-2006 average with the baseline 1994-1998 average the number of people killed or seriously injured in road accidents has reduced by 25%, from 69 to 52; the number of children killed or seriously injured has reduced by 22%, from 9 to 7; the slight casualty rate expressed as the number of people slightly injured per 100 million vehicle kilometres has reduced by 28%, from 36 to 26.

Road - Casualties - There was an average of approximately 235 casualties per year. Analysis indicates that the vast majority of casualties, around 80%, 185 per year, suffered only slight injury, while around 17% were seriously injured and 3% died as a result of their injuries. The majority, 64% were drivers or riders, 23% were passengers and 13% were pedestrians. In each of the 3 years, the highest proportion of casualties are aged 16-20, representing around 17% of the total number of casualties. The number of casualties tends to reduce with age. Over the 3 year period, there were a total of 23 fatalities, all but 2 of whom were 40yrs or under and approximately 74% of whom were male. Males account for a similar proportion of seriously injured casualties, while the proportion of those who were slightly injured that were male is lower at approximately 55%.

Road - Collisions - Between 2004 and 2006, there was an average of approximately 550 collisions a year. Analysis of the data indicates that on average, around 1% of collisions were fatal, 6% caused serious injury, 24% resulted in slight injury and the remainder were damage only. There has been a yearly average of 880 driver/riders involved in collisions over this period, 2/3 of whom were male and of them, the largest proportion, 15%, were aged 16-20yrs. This equates to approximately 9% of all driver/riders involved in collisions. The most common age group for female drivers involved in collisions was 21-25yrs. The number of driver/riders in each 5yr age group reduces steadily with age, except for a very slight increase from 31-40yrs.

Road – Congestion - Journey times in and around Elgin have increased by 50% over the last ten years. In Moray the number of drivers perceiving their journeys had been delayed due to congestion has increased from 11.4% in 2005/06 to 12.8% in 2006/07.

Road – Sustainable Travel - A survey in February 2007 of schools in Moray showed that on average 56% of pupils are involved in active travel (walking or cycling) to or from school, whilst on average 30% are transported by car.

Road – Sustainable Travel - According to the last Census 2001 data in Moray the majority of people (53%) travelling to work or study travelled less than 5 km. 13% of people travelling to work or study travelled over 20 km.

Road – Sustainable Travel - Moray has a high number of people travelling to work by bicycle or walking compared to the Scottish average. The Scottish Household Survey (2005/06) found that 17% of the Moray workforce walks to work compared to the national average of 13%, while 6% cycle to work compared to only 2%

nationally. The higher proportion of Moray workforce using these active modes of travel is encouraging and with an estimated 44% of workers living within 2km of their workplace these numbers could be increased.

Road - Transport - Compared to the rest of Scotland, Moray has a much smaller proportion of its population living in urban areas – 24% compared to 70% for Scotland as a whole. Most of Moray residents live within a 60 minute drive of a settlement of at least 10,000 population, with less than 1% living in areas described as very remote. This contrasts with other parts of the HIE area, where very remote small towns and very remote rural areas are home to a much higher proportion of residents. Outside the main towns, the Moray area falls into three classifications: 'accessible rural' in the north of the region around Elgin, 'remote rural' in an arc covering the eastern and western borders of the region and mid Moray and 'very remote rural' covering, broadly, the area of the Cairngorm national park.

Road - Transport Infrastructure - Moray has over 1600 km of road of which 16% is trunk or other A class roads with no dual carriageway, 18% B class, 22% C class and 44% unclassified. The condition of Moray roads are generally regarded as good, with only 30.7% of the road network in Moray being considered for maintenance treatment. Moray is in the top quintile for road condition, well above the national average of 37.2%.

Road - Transport Infrastructure - The higher rate of car dependency may be linked to the 'rural' nature of Moray, with the area classified as mainly 'accessible rural' or 'remote rural', where the level of 'everyday' drivers is 53% and 49% respectively, compared to 33% for 'large urban areas'.

Road - Vehicles - From 2004 to 2007 vehicles in the Moray area have travelled an average total of over 718 million vehicle kilometres per year. During 2007 it is estimated that council staff travelling to work by car clocked up nearly 4.5 million km, which equates to 937,000 (kg) of CO2 emissions.

School Achievement - Duke of Edinburgh Award Scheme - There are currently 49 young people taking part in this scheme, 15 boys and 34 girls. All are working towards their bronze award with the exception of 3 of whom 1 is working towards their silver and 2 towards their gold.

School Achievement - Health - As at November 2007, 21 of the 54 primary and secondary schools in Moray have achieved 'commitment' status and 8 schools have achieved 'commended' as Health Promoting Schools.

School Achievement - Health - Access to drinking water is provided in all primary schools with 91% of schools providing access to drinking water in accordance with the Scottish Government definition, remaining above the national level.

School Achievement - Leadership - All Moray schools have Pupil Councils, while 53 of 54 have established Parent Councils.

School Achievement - Music - Moray pupils also regularly participate in musical groups with approximately 75% of instrumental instruction pupils participating in school groups. 265 pupils attend the Moray Music Centre on a weekly basis with another 75 participating in the weeklong Moray School Orchestra course. 20 pupils from Fochabers Fiddlers have toured America while another 60 pupils toured Europe with Moray Concert Brass. Moray Concert Brass have placed or won the Scottish Brass Championship for the last three years. Approximately 25 pupils per year take

part in the National Youth Orchestra for Scotland, National Youth Choir and National Fiddle Competitions, which is slightly above average compared to other local authorities without specialist music schools. The Moray Music Festival is held every two years over a 10-day period and provides an opportunity to compete in music, dance, speech and drama for both adults and children. In 2007, 32 of the 46 primary schools and 8 of the secondary schools had entries in the Festival.

School Achievement - Sports - In terms of sport, 1,500 children were involved in the Council's term time and holiday sports coaching programme in 2006/07. In the past year at least 18 young people have competed in sporting activities at a national / international level. In 2007/08, 1,248 P3-P7 pupils participated in after school 'Stay and Play' activities.

School Achievement - Sports - Active Schools in Moray has helped to increase the participation levels of school children in curricular and extra-curricular sports and physical activity sessions. Continued delivery of the sports coaching term-time and holiday programmes in the area attracts over 8,000 children annually.

School Achievement - Theatre - Pupils participated in theatre through the Elgin Macbeth, a Highland 2007 event between Moray Council and the National Theatre of Scotland. A professional cast of 5 and a professional production team worked for 9 months with 60 community members including a Gaelic choir and musicians and 160 pupils from 5 Moray secondary schools. 800 people attended the performances held in June 2007 in the ruins of Elgin Cathedral. Schools also created visual arts installations in various parts of the cathedral.

School Achievement - Travel Plans - In 2006/07, 83% of Moray schools were engaged in the travel planning process with 15% of schools having completed travel plans. A survey in February 2007 of schools in Moray showed that on average 56% of pupils are involved in active travel (walking or cycling) to or from school, whilst on average 30% are transported by car.

School – Attainment - Although results for S4 students in Moray have decreased in all but one of the six categories since last year, Moray remains equal to or above the national average in the majority of areas. Nationally there were small percentage increases in two categories, with the other categories either remaining the same or decreasing. Improvement in students gaining five or more awards at Level 5, which was achieved with 37%, exceeding a target of 36%, 2% up on the previous years' result and equalling the best ever performance for Moray.

School – Attainment - In reading, writing and mathematics, results in Moray Primary Schools remained unchanged from the previous years' performance with 84% of pupils in reading, 78% in writing and 85 % in maths achieving or exceeding expected levels. In 2006/07, primary pupils attaining or exceeding 5-14 levels for their age in Moray were ranked 3rd equal in Reading, 3rd in Writing and 4th in Mathematics against Moray's five comparator authorities.

School – Attainment - In two of the three areas there was an improvement in performance in Moray Secondary Schools in 2005/06. In 2006/07, there was a further 2% improvement in the performance for reading and writing but a drop of 3% in mathematics. In 2007/08, there was a further 3% increase in reading to 73%, a 2% improvement in Maths to 63% but performance in writing dropped by 2% to 61%. In 2006/07, secondary pupils attaining or exceeding 5-14 levels for their age in Moray were ranked 1st in Reading, 1st in Writing and 3rd in Mathematics against four

comparator authorities (the fifth comparator authority no longer records secondary 5-14 results).

School – Attainment - Level 6 results for S5 pupils in Moray have increased in two of the three categories from the previous years' performance, whereas nationally, results remained unchanged or decreased. Moray remains above the national average in pupils achieving one or more award at Level 6 but below in the two remaining categories. Moray's performance has improved in all four categories in S6, and is now equal to or above national averages in all categories. Nationally, performance from the previous year has remained unchanged in two categories and increased in two categories.

School Attendance - Primary - Attendance at Moray Primary Schools' increased by 0.1% to 95.6% in 2006/07, remaining above the national average, which increased by 0.3% to 95.3% but below comparator authorities' average, which had seen an unexpected 0.4% increase. In Moray, attendance since 2004/05 had decreased by 0.1% but remained relatively consistent over that period. Both national and comparator authorities' averages have increased since 2004/05.

School Attendance - Secondary - Attendance at Moray Secondary Schools, when comparing results with 2005/06, had significantly decreased by 1%. (There had been a 0.9% increase in authorised absence during the same period). Incorrect coding of study leave within one secondary school adversely affected 2006/07 published figures. Accepting the 2006/07 results as published, Moray remains above the national average but below comparator authorities' average. There would be a positive change in its position against comparator authorities when taken into account the coding error.

School - Class Size - Class size bandings have changed from the 2006 census and Primary 1 results are now reported separately, making comparisons between years more complex. The highest proportion of pupils in Primary 1 (86%) was taught in classes of between 19 to 25 pupils, a position mirrored in comparator and national statistics. The highest proportion of pupils in Primary 2 and Primary 3 stages (88%) were taught in classes of between 19 to 30 pupils, again a similar position in comparator and national averages. The highest proportion of pupils in Primary 4 to Primary 7 stages (90%) were taught in classes of 30 or fewer pupils. In 2006, 48% of pupils were taught in classes of between 26 and 30 pupils and 45% in classes of fewer than 20 to 25.

School - Class Size - In Moray, the average class size in all classes was 22.8, an improvement from 23.3 in 2006, remaining just above comparators authorities' average of 22.3 but below the national average of 23.3. In single stage classes, Moray's average class size has decreased from 24.8 in 2006 to 24.3 in 2007, remaining below comparator authorities' and the national averages of 24.7 and 24.8 respectively. In composite classes, Moray's average class size has decreased from 20.5 in 2006 to 19.7 in 2007, remaining slightly above comparator authorities' average of 19.3 but below the national average of 20.0. In 2007, Moray's average class sizes were above that of our comparator averages in two of the three categories but below national averages in all categories.

School - Class Size - In Moray, with the exceptions of Primary 1 and Primary 7, average primary class sizes in all other class stages were below comparator authorities' averages and the national average.

School - Environment - In 2007/08, 98% of Moray schools are registered Eco Schools, which is higher than the national average of 91%. To date, a total of 46 schools have been awarded a bronze award, 26 have received a silver award and 4 have received the Green Flag award, 3 primary – Cabrach, Applegrove and St Thomas RC – and 1 secondary, Forres Academy. Cabrach Primary has recently received its 2nd Green Flag award, confirming that it has maintained and extended its environmental programme during the 2 years since the initial Green Flag award. Once a school has been awarded 4 Green Flags, it receives permanent Green Flag status.

School - Ethnic Minorities - The number of pupils from ethnic minority groups has increased from 171 in 2004 to 197 in 2006. There are 2 data zones in Moray, 1.7% of the total, that are within the 15% most education deprived in Scotland, both of which are in Elgin.

School Leavers - There has been little movement between 2004 to 2007 in the proportion of school leavers entering positive and sustained destinations. Demand from young people of Employability support through Moray New futures has increased by approximately 30% indicating a gap in provision to meet the needs of young people who are more distanced from the labour market.

School Leavers - The proportion attending full-time higher education has remained at 25% in 2007/08 compared with 31% nationally and 30% in comparator authorities. This may represent some pupils' choice for a more vocational based course as evidenced by the 2 increase in the number of leavers entering full time further education in 200708

School Leavers - In 2007/08, 52% of school leavers went on to either further or higher education. 38% went directly into employment or training and 9% were unemployed but seeking employment or training. Only 2% of school leavers were either unemployed and not seeking employment or training, or their destination is unknown.

School Leavers - Of 1,231 school leavers in Moray in 2007/08, 90% went on to further/higher education, training or employment, 9% were unemployed but seeking employment and the remainder were either unemployed and not seeking employment or their destination was unknown. Numbers in all categories have remained fairly consistent for the last 3 years.

School Leavers - The region produces around 1,100 school leavers per annum. Around half of these enter further or higher education. Many more enter employment straight from school (37%) than in Scotland as a whole (25%).

School Leavers - The proportion attending full-time higher education has remained at 25% in 2007/08 compared with 31% nationally and 30% in comparator authorities. This (delete decrease) may represent some pupils' choice for a more vocational based course as evidenced by the 2% increase in the number of leavers entering full time further education in 2007/08.

School - Meals - In Moray, 9.4% of the primary school roll was entitled to receive free school meals, remaining lower than national comparator authority levels. 9.2% of the primary school roll was registered to receive free meals. Moray is very successful at registering those pupils entitled to free school meals in comparison with national levels.

School - Meals - In Moray, there were 7,055 pupils on the primary school roll, with 664 entitled to free meals and 649 registered. 605 registered pupils were present on census day with 550 of those taking free meals.

School - Meals - Of the 5,195 secondary pupils present on schools meal census day, 1,925 (37.1%) secondary pupils took either a free or purchased school meal, well below that of our comparator authorities' (49.5%) and below national average levels (42.9%). Although Moray's result is lower than that of our comparator authorities' and national average levels, there has been an increase from the previous reporting year, against decreases in our comparator authorities and national averages. Of those secondary pupils registered for free school meals and present on census day, 64.2% of those registered took a free school meal, remaining above that of our comparator authorities' (62.8%) and national (55.8%) average levels. The 2008 price for a standard school meal for Moray Secondary schools is £1.85, the 4th (equal) highest cost out of all the 32 Scottish local authorities. This compares to a national average of £1.62.

School - Meals - Of the 6,706 pupils present on school meals census day, 2,737 (40.7%) of primary pupils took either a free or purchased school meal, below that of comparator authorities' (50.3%) and national (49.6%) average levels. Moray's result equalled that of the previous reporting year, against increase in comparator authorities' and national averages. Of those primary pupils registered for free school meals and present on census day, 84.7% took a free school meal, remaining above that of comparators authorities' (79.9%) and national (81.3%) average levels. The 2008 price for a standard school meal for Moray primary schools is £1.80, the highest cost out of all of the 32 Scottish local authorities. This compares to a national average of £1.53.

School - Pre-school - In Moray there were 55 local authority or partnership pre-school education providers in Moray, 22 were local authority pre-school education providers and 33 providers were in partnership with the local authority.

School - Pre-school - There were 690 registrations for the ante-pre-school year of pre-school education in Moray representing 96.9% of all children eligible.

School - Pre-school - There were 850 registrations for the pre-school year of pre-school education, representing 102.9% of all children eligible.

School - Roll - In Moray in 2006 there were 7,133 primary school pupils and 5,890 secondary school pupils, an overall drop of around 2% since 2003 (comprising a 4% drop in primary pupils & a 2% rise in secondary pupils).

School - Road Safety - The Moray Council have taken measures to improve safety and access for active modes by introducing 20mph speed limits outside schools; by providing safe, secure cycle parking at 21 schools totalling 660 spaces, 410 of which are within fully enclosed, locking compounds; by undertaking footway improvements and establishing cycle routes between schools and key areas of housing; by introducing School Travel Awards and Travel Smart incentive schemes to celebrate success and share best practice and reward active travel as well as setting up walking buses and cycle trains.

Smoking - The Scottish Household Survey 2005/06, indicates that approximately 26% of the adult population of Scotland smokes, a figure that has been reducing steadily since 1999. Overall there is little difference between the sexes, although in individual age groups, there are some variations, the most profound in the 35-44yrs age group,

in which 29% of males smoke compared with 10% of women. The highest level of smoking in males is in the 25-34yrs age group, in which 35% smoke, while the highest level of smoking in females is in the 45-59yrs age group, in which 29% smoke. Figures for Moray suggest that 23% of the adult population smoke, 3% lower than the national figure.

Smoking - Cessation - During 2006, there was a total of 8,474 registrations with a smoking cessation service in Grampian, representing approximately 9.7% of the estimated total number of smokers in the region. This compares with a national uptake rate of 4.3%. Unfortunately the majority of people were lost to follow-up so it is not known how successful they were. However, 9% had quit smoking at the 1-month follow-up, while 7.6% had quit at the 3-month follow-up. These figures compare with national rates of 34% at 1 month and 17% at 3 months.

Smoking - Cessation - During 2007, the number of quit attempts was nearly ½ that of 2006, at 4,452, an uptake rate of 4.4%, compared with 3.9% nationally. However, the 1-month quit rate was higher than in 2006, at 17%, while the 3-month quit rate was virtually unchanged at 8%. Again there was a large proportion lost to follow-up. Quit rates for Scotland in 2007 were 37% at 1 month and 18% at 3 months.

Smoking - Deaths - In 2007, there were 64 deaths in Moray due to “malignant neoplasm of the trachea, bronchus and lung”, making it the 3rd most common cause of death in Moray. Most common was “ischemic Heart Disease”, accounting for 127 deaths, followed by “cerebrovascular diseases”, which accounted for 89 deaths. “Chronic lower respiratory diseases” accounted for just 1 less death than malignant neoplasms.

Smoking - Pregnancy - ISD Scotland provision statistics report that in Grampian, for the period ended 31st March 2007, at a woman’s first antenatal booking appointment, for the 5,781 bookings recorded, 69.8% stated that they had never smoked, 20.3% stated that they were currently smoking and 7.8% stated that they were former smokers. Nationally, for the same reporting period, 57.7% had never smoked, 20.9% were currently smoking and 9.5% were former smokers. Overall, levels of smoking recorded at a woman’s first antenatal booking appointment have decreased since 1998 although increases during the period are evident.

Smoking - Young People - Approximately half of both age groups of regular smokers wanted to give up smoking, and nearly 80% had tried to give up. The perception of ease of giving up was substantially different according to how long the pupils had been smoking. Of those who had smoked for less than 1yr, 69% thought it would be fairly or very easy to give up, while just 21% of those who had smoked for longer than 1yr, felt the same.

Smoking – Young People - In the recent Youth Lifestyle survey, it revealed that Moray has a higher level of smokers in every year group except year 1 and 4 compared to Grampian.

Smoking - Young People - Nearly ¾ of 15yr olds thought it was OK to try smoking to see what it was like, whereas less than ½ of 13yr olds thought it was OK. The proportion of non-smokers with at least one parent, who smokes daily, was lower than that of regular smokers. There was a similar though slightly smaller difference between the proportions of regular smokers with no parents smoking daily and those with at least one parent smoking daily.

Smoking – Young People - The 2007 Grampian Youth Lifestyle Survey (2007) found that the majority of young people in Moray who smoke are smoking between 6-10 cigarettes per day. In general it would appear that unlike 2001 survey, females smoke more cigarettes than males.

Smoking - Young People - The SALSUS Survey 2006, Moray Report, indicates that 4% of 13yr olds and 20% of 15yr olds smoke regularly (usually smoke one or more cigarettes a week). This compares with 4% and 15% nationally. The levels of occasional smokers (smoking less than 1 cigarette a week) are also higher in Moray than nationally, at 4% of 13yrs olds and 10% of 15yr olds, compared with 3% and 6% respectively in Scotland as a whole.

Sports - Adults - SportsScotland participation figures for 2003-06 also reflects that the Moray adult population on average participate more regularly in physical activities compared to the Scottish average. Weekly and monthly participation rates for adults in Moray were 46% and 59%, compared to national figures of 33% and 46% respectively. When also including walking 2+ miles as a physical activity Moray participation levels were 62% for weekly and 72% for monthly participation, compared to national rates of 46% and 59% respectively. SportsScotland reported that participation rates in Moray were generally above the national average across most demographic groups and sports.

Tourism - Environment - Communities take great pride in the presentation of their villages and it is a great tourist attraction. Forres and Duffus won the Silver Gilt award in 2007 in the Britain in bloom awards. Duffus was also awarded the Environmental Quality Award.

Tourism - Moray based businesses to achieve the award under the GTBS for their commitment to sustainable tourism include Easter Corrie Holidays (Gold); Balvenie Castle and Tomintoul Youth Hostel (both Silver); Bluefolds Highland Holiday Cottages, Tomintoul Art Gallery and the Whisky Castle (Bronze).

Vehicle - Ownership - During 2005/06 61% of the Moray workforce took their car to work, 6% below the national average of 67%. According to the last Census 2001 in Moray the majority of people (53%) travelling to work or study, travelled less than 5 km. Of the 53% who travel less than 5 km to work, 44% of those actually travel less than 2 km. 13% of people travelling to work or study travelled over 20 km.

Vehicle - Usage - 52% of Moray residence (aged 17 and above) claim to use a car everyday, which is well above the national average of 41%. Indeed Moray has the third highest level of people driving their car everyday in Scotland, only Aberdeenshire (57%) and East Renfrewshire (54%) have a higher rate. The higher level of car use may be linked to the 'rural' nature of Moray, with the area being classified as mainly 'accessible rural' or 'remote rural', where the level of 'everyday' drivers is 53% and 49% respectively, compared to 33% for 'large urban areas'.

Waste - In Moray, during 2005-6 a total of 3.848 million refuse collections dealt with almost 62,000 tonnes of combined household and commercial waste (municipal solid waste). The 1.7 million recyclable collections, together with the material collected at the 7 recycling centres and 60 recycling points, ensured that 18,995 tonnes of waste was recycled rather than buried in 2005/06. Each household in Moray produced, an average of 1.19 tonnes of waste and of the 76% of households offered a kerbside collection, an average of 112 kg was recycled. This compares with the Scottish average of 71% households offered kerbside collections with an average of 123kg recycled per household.

Waste - The amount of municipal waste produced in Moray has increased (4%) over the last 3 years, although the proportion going to landfill has dropped and the amount being recycled has increased. Moray has reduced the amount of waste being landfilled by 13% since 2005/06, and has increased the amount of waste recycled by 48.5% over the same period. Moray met their 2008 recycling target, set by the Scottish Government, by March 2006 and continue to exceed future recycling targets set for the area.

Waste - Composting - The percentage of households participating in Home composting has seen an increase in Moray since the introduction of the promotional campaign in 2005/06 and currently stands at 15%.

Waste - Domestic - The actual volume of waste in Moray has increased by 4% from 2005/06 to 2007/08, although there was a slight drop over the last year of 1.2%. The number of household and commercial premises will have a direct bearing on the amount of waste. Over the past three years there has been a steady increase in the number of household premises (2.7%) and an overall increasing trend in the number of commercial premises (11.5%).

Waste - Landfill - Landfill rates are lower than national average, and recycling rates higher. In 2007/08 the tonnage of municipal waste collected was 64,349. 56% of this total was then landfilled as opposed to 69.1% in 2005/06. Over the last three years there has been a rise in the proportion of municipal waste recycled from 30.9% in 2005/06 to 44% in 2007/08. There has been an overall volume increase in recycled waste of 48.5%, with recycling increasing by 43.4% (13,438 to 19,274 ton) and composting by 60.5% (5,626 to 9,032 ton).

Waste - Landfill - Moray has met the Scottish Government targets for reducing the amount of Biodegradable waste put to landfill. The target for 2009/10 for Moray is set at a maximum of 25,437t, Moray for has already surpassed the target with 21,290t biodegradable waste being landfilled in 2007/08. Moray has already exceeded the 2009/10 target by 16.3%.

Waste - Recycling - Moray achieved the Scottish Executive target for 2008 during 2005/06 with an actual figure of 30.9%, which was 7% up from the previous year, placing Moray in the top quartile across Scottish authorities (8th).

Waste - Recycling - The Moray Council's Kerbside collection, of green waste and dry recyclables including bottles, cans and paper, was introduced in September 2004 to households in Forres and Kinloss. The service spread to Elgin, Keith, Buckie and other settlements with over 500 households by March 2006 and in August 2006, the Council approved an extension of the service to Mosstodloch and Portgordon with further extensions of the service as resources allow.

Young Offenders - 80% of those whose offending has increased have had more than 1 referral compared with 20% of those whose offending has reduced.

Young Offenders - Over the period 2006/07, Moray Youth Justice has referred over 20 young people to Outfit Moray. One group consisted of young people with drug and alcohol issues. Of those who continuously attended the sessions, the majority have reduced both their offending and alcohol consumption. Nearly all attendees have improved self-esteem and confidence enabling a few to return to school on a part-time basis.

Young Offenders - The 4 most prevalent types of offence are breach of the peace, petty assault, crimes of dishonesty and vandalism. Due to a change in recording, the number of detected charges for these offences has reduced considerably over this period, from 813 in 2005/06 to 511 in 2006/07, a fall of 37%. In the first half of 2007/08, the number of detected charges is 93, 64% less than half 2006/07's figure.

Young Offenders - The four most common types of detected charges are breach of the peace, petty assault, vandalism and crimes of dishonesty.

Young Offenders - The majority of young people have reduced offending after completing their programme: 57% in 2004, 81% in 2005 and 86% in 2006. Of the 91 young people referred over the 3-year period, 45 have not re-offended, 24 have reduced offending, 7 have remained the same and 15 have increased their offending.

Young Offenders - The number of offenders of each age has remained fairly constant over the last 3 years, with numbers increasing steadily with age. In both 2004/05 and 2006/07 the largest increase in the number of offenders occurs from 11yrs to 12 yrs and in 2005/06 from 12yrs to 13yrs; in each year the number nearly doubled.

Young Offenders - The number of persistent young offenders, that is young offenders with at least 5 referrals to the Children's Reporter in a 6-month period, has remained virtually constant at 38 and 37 respectively for 2005/06 and 2006/07, and in the first 6 months of 2007/08, 15 young people have been identified as persistent offenders. The majority of these are new persistent offenders and most are located in Elgin, Speyside and Buckie areas. 17 of the 37 persistent offenders in 2006/07 were also persistent offenders in 2005/06 and 6 of the 15 persistent offenders in the first 6 months of 2007/08 were also persistent offenders in 2006/07.

Young Offenders - The numbers of referrals in each of 2004, 2005 and 2006 are 37, 38 and 29 respectively and in each year approximately 85% were male. In 2004 there were 2 young males who had 2 referrals, in 2005, 1 male and 1 female each had 2 referrals and in 2006, 1 female had 2 referrals. In total, 91 young people had 104 referrals over the 3-year period. Of these 91, 65 have just 1 referral, 19 have had 2 referrals, 6 have been referred on 3 occasions and 1 has been referred 4 times.

Young Offenders - The proportion of female offenders has increased over the 3-year period, from 21% (126) in 2004/05 to 27% (162) in 2006/07.

Young People - Accidents - In children under 15, the number of emergency hospital admissions due to home accidents nearly halved between 2001 and 2005, from 114 to 60. The rate per 1000 population has fallen from 6.9, higher than the Scottish average, to 3.8, in line with Scotland. According to ROSPA, in 2006/07, home accidents led to 32 emergency hospital admissions of under 5s.

Young People – Child Protection - As at 31st March 2008, in Moray, there were 89 children on the Child Protection Register, a rate of 5.6 per 1,000 population aged between 0 and 15 years, above the national average of 2.7

Young People - Engagement - Young People are actively using the "What's on Where" internet site with monthly hits on the site rising from 550 in 2005 to 6,000 in 2007. The site is contributed to by 16 young people who keep the information up to date and relevant. 6,500 young people hold Smartcards and are then eligible to receive local discounts, which have been, built up by the 20 young people volunteers

with local businesses. 28 young people have also volunteered over 1,000 hours through the Millennium awards volunteers.

Young People - Engagement - Young people have participated in the development of the Moray Youth Strategy and indicated their desire to have a voice. Moray established a youth participation framework with a Youth Council with a full quota of School Councils and representatives at The Scottish Youth Parliament, supported by the Dialogue Youth Initiative.

Young People – Road Safety – Safe Drive provides a hard-hitting road safety message for S5 pupils. It has been running for 3 years and is organised by Aberdeenshire CSP. In 2005 the event was offered to Aberdeenshire and Aberdeen City Secondary Schools and for the last 2 years, Moray Secondary Schools have also participated. In excess of 10,000 young people aged 16-17 have viewed this presentation.

Young People - Street Football - Since its launch in October 2006, there has been 111 sessions of street football arranged, only 19 of which have been cancelled, all due to bad weather (16) or illness (3). A total of 2299 young people have taken part and only 10 sessions have attracted fewer than 10 participants. In July 2007, a Carnival of Street Football took place in Elgin, attracting more than 100 participants and many spectators.