

MORAY AREA PROFILE

May 2014



INTRODUCTION

The Moray area profile uses 2011 Census data and other available data sources to present an up-to-date analysis of its population and labour market.

The analysis is structured under the thematic headings of:

- Population.
- Labour market.
- Education and qualifications.
- Health and wellbeing.
- Ethnicity and migration.

To help contextualise the 2011 findings, the area profile includes corresponding figures where available for:

- The Highlands and Islands area and Scotland as a whole.
- The 2001 Census, to show how Moray has changed over the last 10 years.

HEADLINE FINDINGS

The headline findings for Moray are:

- Total population was 93,295 in 2011, an increase of 7.3 per cent from 2001.
 - A business base and employment base per 10,000 adults that is below the Highlands and Islands and Scotland levels.
 - Compared with the Highlands and Islands and Scotland, a higher share of employment by industry in mining, quarrying and utilities, manufacturing, and public administration and defence.
 - Compared with the Highlands and Islands and Scotland, a higher share of employment by occupation in associate professional and technical, and process, plant and machine operative occupations.
 - Unemployment rates lower that are now below both the Highlands and Islands and Scotland rates. The annualised Jobseekers Allowance claimant count rate in 2013 was 2.1 per cent in Moray, 2.4 per cent in Highlands and Islands and 3.7 per cent across Scotland.
 - School attainment and school leaver positive destinations rates (i.e. not into unemployment) above the Highlands and Islands and Scotland averages.
 - A smaller proportion of the adult population with degree-level qualifications than the Highlands and Islands and Scotland.
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FIGURE 2: AGE BREAKDOWN OF 2001 AND 2011 POPULATION

| | | 0-14 | 15-24 | 25-44 | 45-64 | 65+ |
|-----------------------|------|------|-------|-------|-------|------|
| Moray | 2001 | 18.8 | 10.8 | 29.6 | 24.4 | 16.3 |
| | 2011 | 16.9 | 11.7 | 24.8 | 28.1 | 18.5 |
| Highlands and Islands | 2001 | 18.3 | 10.3 | 27.4 | 26.7 | 17.2 |
| | 2011 | 16.3 | 10.8 | 23.7 | 29.7 | 19.4 |
| Scotland | 2001 | 17.9 | 12.5 | 29.2 | 24.5 | 15.9 |
| | 2011 | 16.1 | 13.1 | 26.5 | 27.5 | 16.8 |

Source: Census 2001 and 2011

By gender, some 49.2 per cent of Moray's population was male in 2011, which was marginally greater than the Highlands and Islands (49.0 per cent) and Scotland (48.5 per cent).

FIGURE 3: GENDER BREAKDOWN OF 2001 AND 2011 POPULATION

| | | Male | Female |
|-----------------------|------|------|--------|
| Moray | 2001 | 50.0 | 50.0 |
| | 2011 | 49.2 | 50.8 |
| Highlands and Islands | 2001 | 49.1 | 50.9 |
| | 2011 | 49.0 | 51.0 |
| Scotland | 2001 | 48.1 | 51.9 |
| | 2011 | 48.5 | 51.5 |

Source: Census 2001 and 2011

POPULATION PROJECTIONS

Looking forward, the General Register Office for Scotland's 2010-based population projections find that the Moray population is expected to increase by 4.5 per cent between 2010 and 2020. The Highlands and Islands population is projected to increase by 4.0 per cent and Scotland's population by 5.1 per cent.

LABOUR MARKET

Turning to the labour market data, the analysis of the resident population has been structured under the sub-headings of:

- Economically active
- In employment
- Unemployment
- Economically inactive

Utilising widely available labour market statistics, Figure 4 presents an overview of the total employment and business base for Moray, the Highlands and Islands and Scotland for 2012. These statistics show that per 10,000 adult residents Moray had:

- Lower employment (employees and working proprietors) relative to the Highlands and Islands and Scotland.
- Fewer businesses and business starts per 10,000 adults than both the Highlands and Islands and Scotland averages.

FIGURE 4: TOTAL EMPLOYMENT, ACTIVE ENTERPRISES AND BUSINESS STARTS, 2012

| | Total Employment | Number | | Per 10,000 Adults | | |
|-----------------------|---------------------|-----------------------|--------------------|---------------------|-----------------------|--------------------|
| | | Active Enterprises | Business Starts | Total Employment | Active Enterprises | Business Starts |
| Moray | 34,500 | 2,595 | 190 | 4,528 | 341 | 25 |
| Highlands and Islands | 201,600 | 17,575 | 1,627 | 5,519 | 479 | 44 |
| Scotland | 2,425,900 | 158,320 | 13,856 | 5,540 | 362 | 32 |

Source: Business Register and Employment Survey (Datazone definition), ONS Business Demography 2012 (LA definition), and Committee of Scottish Bankers New Businesses statistics (LA definition).

Note: Enterprise data refers to VAT/PAYE registered enterprises.

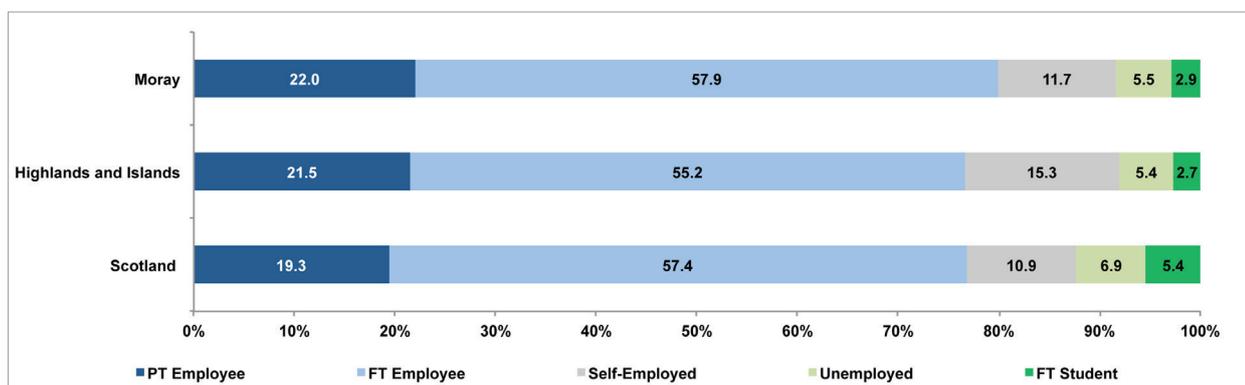
ECONOMICALLY ACTIVE

In 2011, some 71.5 per cent of the Moray population aged 16 to 74 years was economically active. This was in line with the Highlands and Islands rate of 71.3 per cent and above the Scotland rate of 69.0 per cent.

Figure 5 provides a breakdown of the economically active population in terms of their employment status.

- Moray had a higher proportion working as employees (79.9 per cent) compared with the Highlands and Islands and Scotland (both 76.7 per cent).
- A smaller proportion was self-employed (11.7 per cent) than the Highlands and Islands (15.3 per cent).
- Moray and the Highlands and Islands both had smaller proportions as full-time students compared to Scotland as a whole.

FIGURE 5: BREAKDOWN OF ECONOMICALLY ACTIVE 16 TO 74 POPULATION (%), 2011



Source: Census 2011

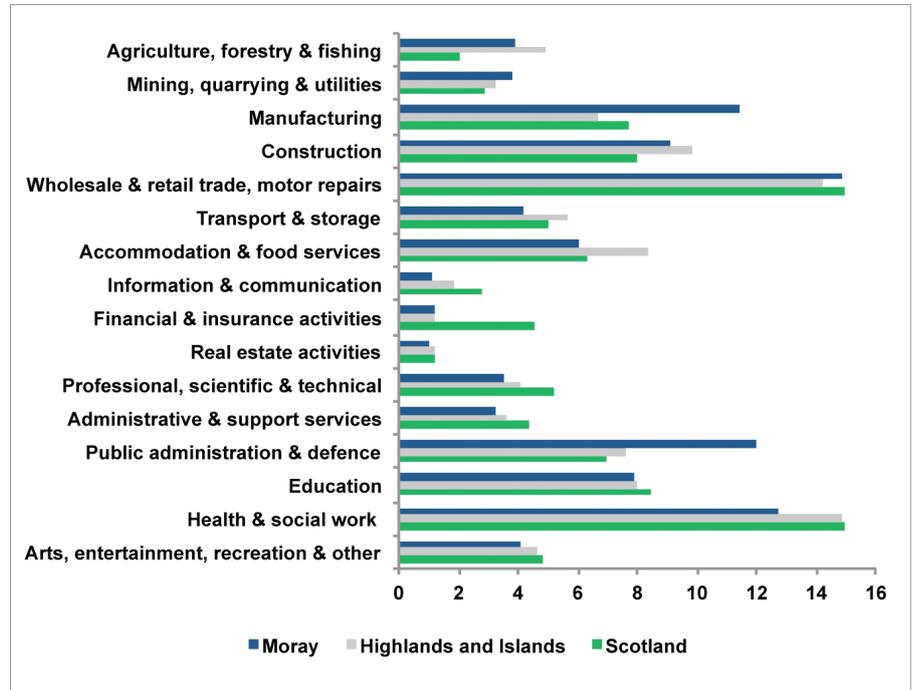
IN EMPLOYMENT

For those in employment, the Census provides information on the industry of employment, type of occupation and the number of hours worked per week.

By industry of employment in 2011, Figure 6 shows that, relative to the Highlands and Islands and Scotland, Moray had:

- A higher share of employment in mining, quarrying and utilities, manufacturing, and public administration and defence.
- A lower share of employment in transport and storage, information and communications, professional, scientific and technical, administrative and support services, and health and social work.

FIGURE 6: EMPLOYMENT BY INDUSTRY (%), 2011

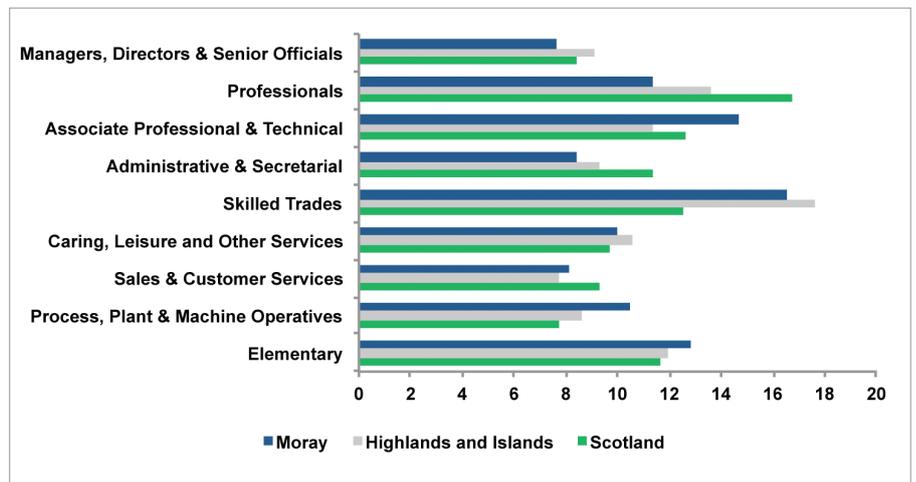


Source: Census 2011

Two charts are presented relating to employment by occupation. The first (Figure 7) presents the share of 2011 employment by occupation and shows that, relative to the Highlands and Islands and Scotland, Moray had:

- A higher share of employment in associate professional and technical, and process, plant and machine operative occupations.
- A lower share of employment in manager, director and senior officials, professional, and administrative and secretarial occupations.

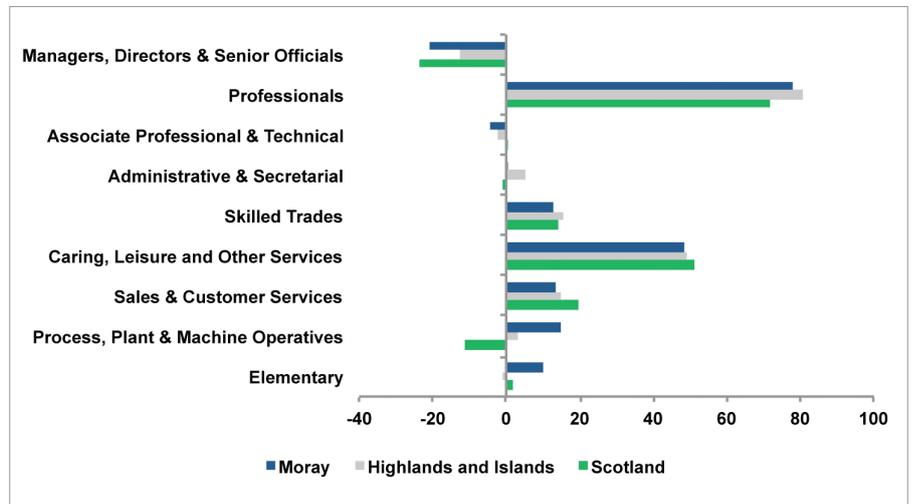
FIGURE 7: EMPLOYMENT BY OCCUPATION (%), 2011



Source: Census 2011

The second (Figure 8) shows the percentage change in employment by occupation between 2001 and 2011. It shows that the trends by occupation were mostly similar across Moray, Highlands and Islands and Scotland.

FIGURE 8: % CHANGE IN EMPLOYMENT BY OCCUPATION, 2011



Source: Census 2001 and 2011

HOURS WORKED

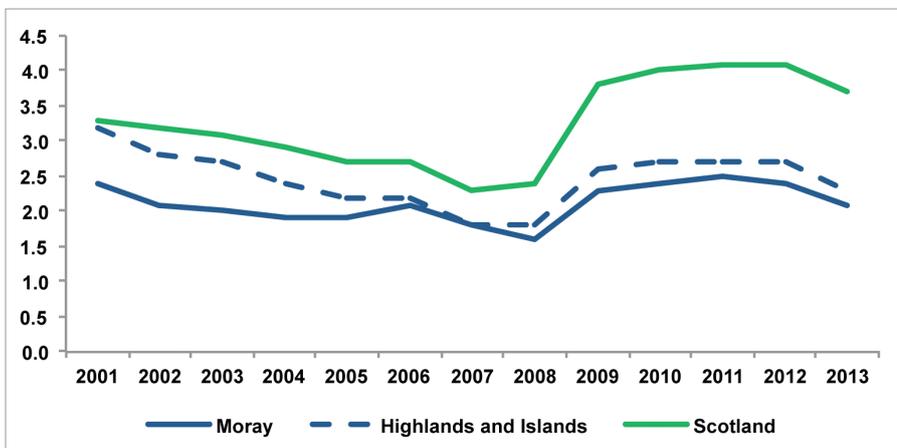
By hours worked, the 2011 Census finds that working more than 49 hours per week was more common in Moray (16.7 per cent) and the Highlands and Islands (16.1 per cent) than across Scotland as a whole (11.7 per cent).

UNEMPLOYMENT

Jobseekers Allowance (JSA) Claimant Count data has been used to analyse unemployment levels. Figure 9 shows the annualised Claimant Count rate from 2001 to 2013.

- Moray has a Claimant Count rate that has tended to be below that of the Highlands and Islands but in 2006 and 2007 the rates were almost identical. In 2013, the annualised rates were 2.1 per cent for Moray and 2.4 per cent for the Highlands and Islands.
- From 2008 onwards, the gap between Moray's Claimant Count rate and Scotland's higher rate has increased. In 2013, Scotland's rate was 3.7 per cent.

FIGURE 9: CLAIMANT COUNT RATE OF 16-64 YEAR OLDS (%), 2001-2013



Source: NOMIS Claimant Count data

Note: Annualised data; datazone data available from 2005.

Figure 10 presents annualised Claimant Count data by gender, age and duration of claim for 2013. It shows:

- The male Claimant Count rate in Moray (2.7 per cent) was almost double the female rate (1.4 per cent).
- The 16-24 year old Claimant Count in Moray (3.4 per cent) was in line with the Highlands and Islands rate (3.5 per cent) and below the Scotland rate (5.4 per cent).
- Amongst 25-64 year olds the Moray Claimant Count rate (1.7 per cent) was below both the Highlands and Islands (2.1 per cent) and Scotland (3.3 per cent) rates.

FIGURE 10: BREAKDOWN OF JOBSEEKERS ALLOWANCE CLAIMANTS, 2013

| | Moray | | Highlands and Islands | | Scotland | |
|----------------|--------|------|-----------------------|------|----------|------|
| | Number | Rate | Number | Rate | Number | Rate |
| Male | 770 | 2.7 | 4,580 | 3.2 | 87,410 | 5.1 |
| Female | 420 | 1.4 | 2,170 | 1.5 | 41,250 | 2.3 |
| 16-24 | 330 | 3.4 | 1,570 | 3.5 | 34,350 | 5.4 |
| 25-64 | 860 | 1.7 | 5,160 | 2.1 | 93,980 | 3.3 |
| Up to 6 months | 760 | - | 3,980 | - | 69,570 | - |
| 6-12 months | 170 | - | 1,040 | - | 22,000 | - |
| 1-2 years | 140 | - | 890 | - | 18,700 | - |
| 2 years + | 120 | - | 820 | - | 18,060 | - |
| Total | 1,190 | 2.1 | 6,750 | 2.4 | 128,670 | 3.7 |

Source: NOMIS Claimant Count data

Note: Annualised data; Rates for 16-24 and 25-64 year olds calculated using 2011 Census data

ECONOMICALLY INACTIVE

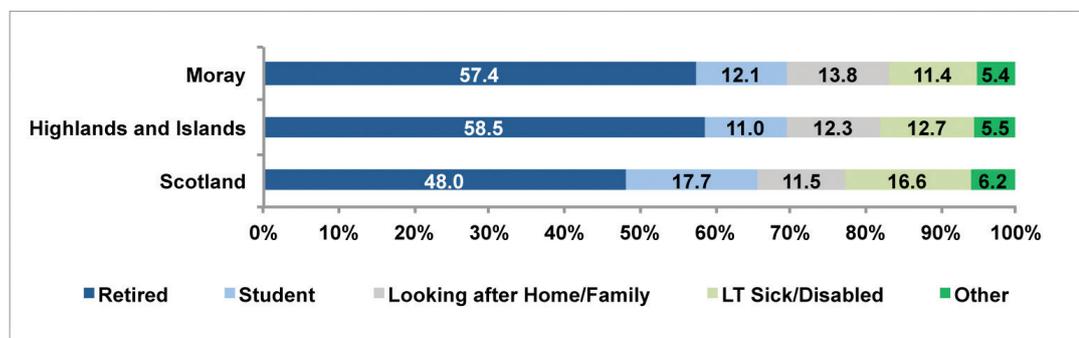
In 2011, some 28.5 per cent of Moray 16 to 74 year olds were economically inactive, compared with 28.7 per cent across the Highlands and Islands and 31.0 per cent across Scotland.

Figure 11 provides a breakdown of the economically inactive and shows:

- Moray (57.4 per cent) and the Highlands and Islands (58.5 per cent) had higher proportions of their economically inactive 16-74 populations who were retired than across Scotland (48.0 per cent).

- Both Moray and the Highlands and Islands had lower proportions of their economically inactive populations who were students or long-term sick or disabled than Scotland.

FIGURE 11: BREAKDOWN OF ECONOMICALLY INACTIVE 16 TO 74 POPULATION (%), 2011



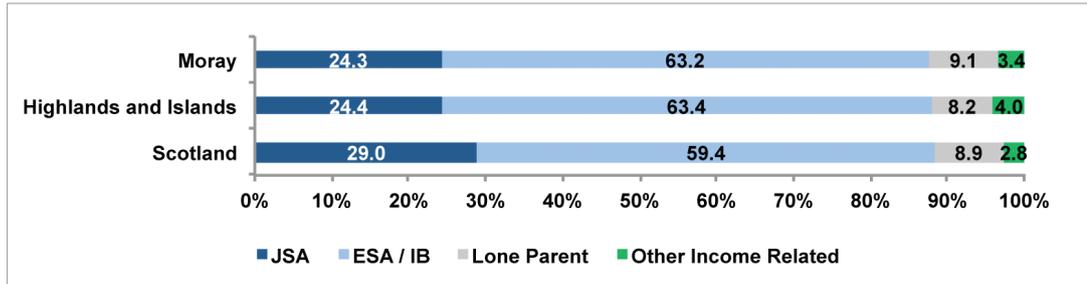
Source: Census 2011

OUT OF WORK BENEFITS

Department for Work and Pensions (DWP) out of work benefits claimant data provides more recent information on working age out-of-work benefits claimants, of which many are economically inactive. In May 2013:

- There were 4,940 people aged 16 to 64 years in Moray claiming out-of-work benefits.
- This equates to 8.5 per cent of the working age population, which was below the Highlands and Islands (9.2 per cent) and Scotland rates (12.9 per cent).
- Figure 12 shows the breakdown of out-of-work benefit claimants by statistical group.

FIGURE 12: OUT-OF-WORK BENEFITS CLAIMANTS BY STATISTICAL GROUP (%), MAY 2013



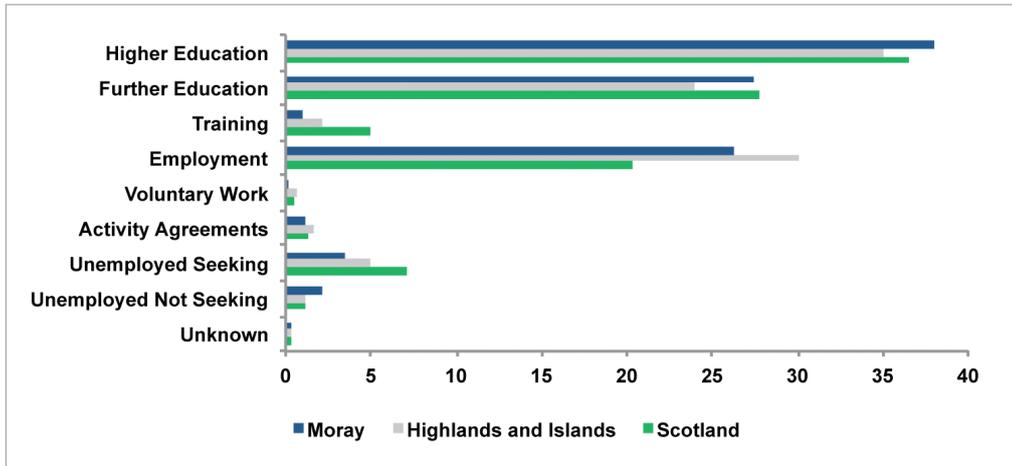
Source: NOMIS DWP WPLS data

Education and Qualifications

Data available from the Scottish Government, Skills Development Scotland and the Census highlight the key education and qualification trends in the Highlands and Islands. They show that:

- In 2011/12, some 83.7 per cent of Moray S4 pupils achieved 5 awards at SCQF Level 4 and above. This was above the rates for the Highlands and Islands (82.9 per cent) and Scotland (80.2 per cent).
- In 2012/13, some 94.0 per cent of Moray school leavers entered a positive destination, which was above the 93.5 per cent for the Highlands and Islands and 91.4 per cent for Scotland.
- Figure 13 shows the breakdown by destination type and shows that compared with the Highlands and Islands:
 - Higher proportions of Moray school leavers entered higher education (38.0 per cent) and further education (27.4 per cent).
 - A lower proportion in Moray (26.3 per cent) entered employment, but the proportion was above the Scotland rate.

FIGURE 13: SCHOOL LEAVER DESTINATIONS (%), 2012/13



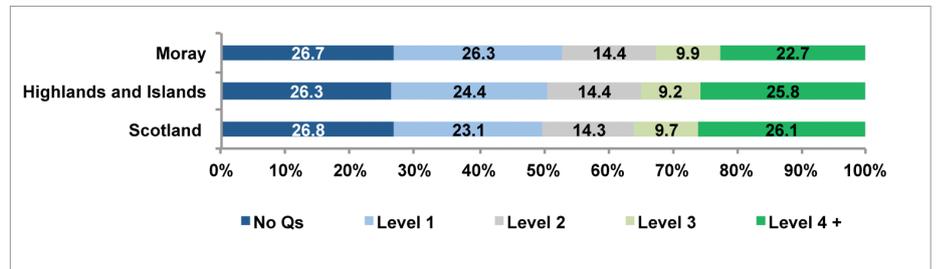
Source: Skills Development Scotland SLDR 2012/13 Initial Destination Figures
 Note: School attainment and destination figures are only available for local authority areas, therefore the Highlands and Islands figures include all of Argyll and Bute.

The 2011 Census provides information on the highest qualification level held by people aged 16 and above. Figure 14 shows that Moray had a smaller proportion of its adult population qualified with Level 4 qualifications or above.

- At Level 4 and above, some 22.7 per cent of the Moray adult population were qualified to Level 4 or above, which was below the Highlands and Islands (25.8 per cent) and Scotland (26.1 per cent) proportions.

- The difference is accounted for by Moray having a higher proportion of its adults qualified with Level 1 qualifications (26.3 per cent) than the Highlands and Islands (24.4 per cent) and Scotland (23.1 per cent).

FIGURE 14: HIGHEST QUALIFICATION HELD BY PEOPLE AGED 16 AND ABOVE, 2011



Source: Census 2011
 Note: Level 1 = Standard Grade, SVQ Level 1 or 2, or equivalent.
 Level 2 = Higher Grade, Advanced Higher Grade, SVQ Level 3 or equivalent.
 Level 3 = HNC, HND, SVQ Level 4 or equivalent.
 Level 4 = Degree, Postgraduate qualifications, SVQ Level 5 or equivalent.

Health and Wellbeing

Health and wellbeing are key contributors to an individual's economic activity. Health statistics from the 2011 Census show that Moray had a better health profile compared to the Highlands and Islands and Scotland.

- On perception of general health, some 85.0 per cent of the Moray population stated that their health was 'very good' or 'good'. This was higher than the rates for both the Highlands and Islands and Scotland at 83.8 per cent and 82.2 per cent respectively.
- Some 17.7 per cent of the Moray population reported a limiting long-term illness or health problem that affected their day-to-day activities. This was below the rates for the Highlands and Islands (18.9 per cent) and Scotland (19.6 per cent).
- Some 8.4 per cent of the Moray population provided unpaid care on a weekly basis. This was below the rates for the Highlands and Islands (9.1 per cent) and Scotland (9.3 per cent).

Ethnicity and Migration

The Moray profile concludes with the ethnicity and migration statistics from the 2011 Census. They show that:

- Some 98.9 per cent of the Moray population were 'white', with the Highlands and Islands proportion being 98.8 per cent. Both proportions were above the Scotland proportion of 96.0 per cent.
 - Of the 'white' population, some 78.5 per cent in Moray were 'white Scottish', which is below the Highlands and Islands proportion of 81.0 per cent and well below the Scotland proportion of 87.4 per cent. The difference is due to the higher proportions of the Moray (18.2 per cent) and the Highlands and Islands (15.4 per cent) populations who defined themselves as 'white British' as opposed to 'white Scottish' than across Scotland as a whole (8.2 per cent).
- Some 5.3 per cent of the Moray population were born outside of the UK, which was above the 3.7 per cent in 2001.
 - In the Highlands and Islands the proportion was 5.2 per cent, up from 3.1 per cent in 2001.
 - In Scotland the proportion was 7.0 per cent, up from 3.8 per cent in 2001.

FURTHER INFORMATION

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