

# INNER MORAY FIRTH AREA PROFILE

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Highlands and Islands Enterprise  
Iomairt na Gàidhealtachd 's nan Eilean

## INTRODUCTION

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The Inner Moray Firth 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 the Inner Moray Firth has changed over the last 10 years.

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## HEADLINE FINDINGS

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The headline findings for the Inner Moray Firth are:

- Total population was 153,293 in 2011, an increase of 14.8 per cent from 2001.
  - A larger employment base per 10,000 adults compared with the Highlands and Islands and Scotland, and evidence of a comparatively large number of business start ups.
  - Compared with the Highlands and Islands and Scotland, a higher share of employment by industry in wholesale and retail, and health and social work.
  - An employment by occupation profile very close to the Highlands and Islands and Scotland.
  - Unemployment rates lower than across Scotland as a whole and in line with the Highlands and Islands rate. The annualised Jobseekers Allowance claimant count rate in 2013 was 2.4 per cent for both the Inner Moray Firth and Highlands and Islands, while it was 3.7 per cent across Scotland.
  - School attainment and school leaver positive destinations rates (i.e. not into unemployment) for the wider Highland Council area above the Scotland average but below the Highlands and Islands.
  - A larger proportion of the adult population with degree-level qualifications or above compared to the Highlands and Islands and Scotland.
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# POPULATION

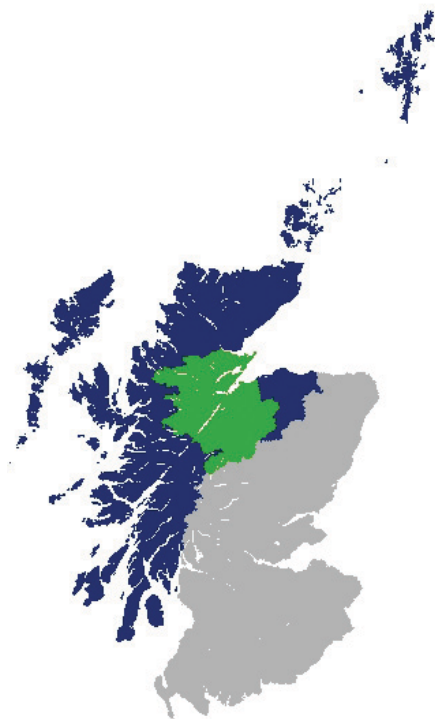
The profile begins with population data from the 2001 and 2011 Censuses, along with population projections to 2020.

In 2011, the Inner Moray Firth had a total population of 153,293. This was an increase of 14.8 per cent from 2001, which was almost double the population increase across the Highlands and Islands (7.5 per cent) and around three times the Scotland increase (4.6 per cent).

**FIGURE 1: TOTAL POPULATION**

	2001	2011	% CHANGE
Inner Moray Firth	133,490	153,293	+14.8
Highlands and Islands	433,524	466,112	+7.5
Scotland	5,062,011	5,295,403	+4.6

Source: Census 2001 and 2011



By age breakdown, the Inner Moray Firth has a younger age profile than the Highlands and Islands but a marginally older profile than Scotland.

- In 2011, some 28.0 per cent of the Inner Moray Firth population was aged 0-24 years, which was above the Highlands and Islands (27.1 per cent) but below Scotland (29.2 per cent). However, this does hide the higher proportion of 0-14 year olds in Inner Moray Firth.
- Between 2001 and 2011, there has been an ageing of the population across the Inner Moray Firth, the Highlands and Islands and Scotland. For example the Inner Moray Firth 65 years and over population increased from 15.9 per cent in 2001 to 17.6 per cent in 2011, while the population aged 45-64 years increased from 26.7 per cent to 29.0 per cent

**FIGURE 2: AGE BREAKDOWN OF 2001 AND 2011 POPULATION**

		0-14	15-24	25-44	45-64	65+
Inner Moray Firth	2001	18.5	10.9	28.0	26.7	15.9
	2011	17.0	11.0	25.4	29.0	17.6
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 48.7 per cent of the Inner Moray Firth's population was male in 2011, which was in line with 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
Inner Moray Firth	2001	48.8	51.2
	2011	48.7	51.3
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 wider Highland Council area population is expected to increase by 7.1 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 the Inner Moray Firth/Highland Council area, the Highlands and Islands and Scotland for 2012. These statistics show that per 10,000 adult residents:

- The Inner Moray Firth had higher employment (employees and working proprietors) relative to the Highlands and Islands and Scotland.
- Highland Council area had:
  - More businesses per 10,000 adults than the Scotland average and only marginally fewer than the Highlands and Islands.
  - Significantly more business starts per 10,000 adults than both the Highlands and Islands and Scotland.

**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
Inner Moray Firth	70,600	NA	NA	5,857	NA	NA
Highland Council Area	102,800	8,990	1,469	5,354	468	77
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.

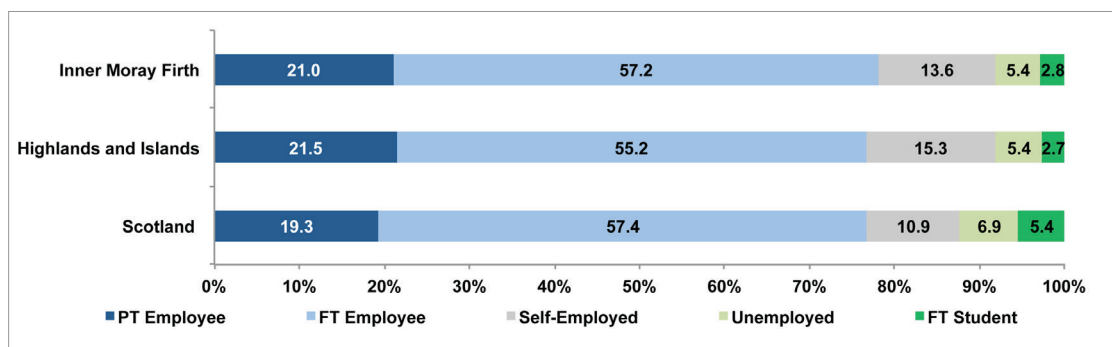
### ECONOMICALLY ACTIVE

In 2011, some 72.4 per cent of the Inner Moray Firth population aged 16 to 74 years was economically active. This was above the Highlands and Islands rate of 71.3 per cent and the Scotland rate of 69.0 per cent.

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

- The Inner Moray Firth had a higher proportion working as employees (78.2 per cent) compared with the Highlands and Islands and Scotland (both 76.7 per cent).
- The proportion self-employed in the Inner Moray Firth (13.6 per cent) was lower than the Highlands and Islands (15.3 per cent), but higher than Scotland (10.9 per cent).
- The Inner Moray Firth 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

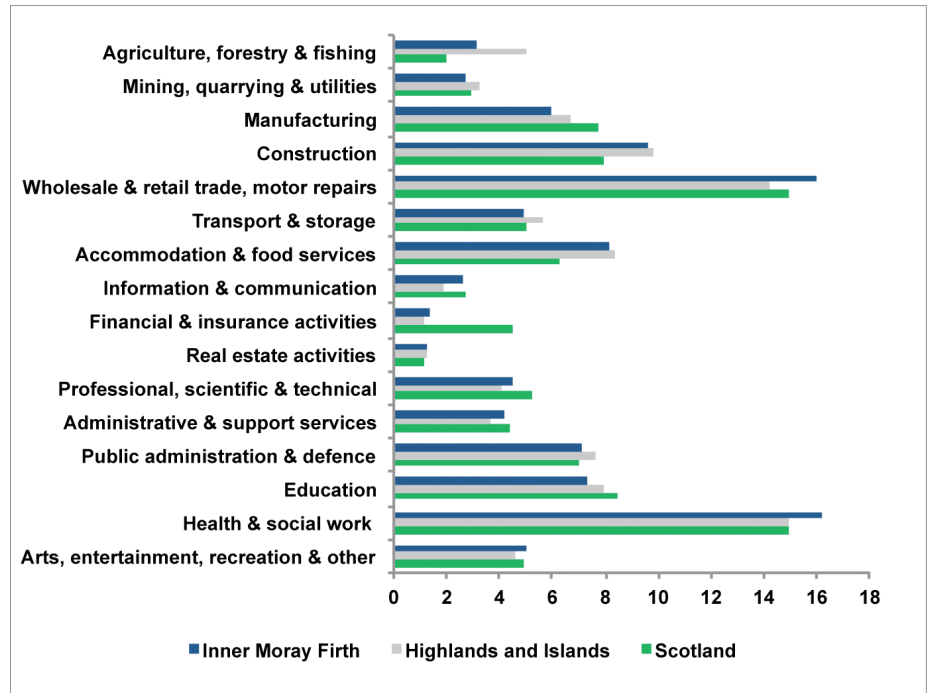
**IN EMPLOYMENT**

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, the Inner Moray Firth had:

- A higher share of employment in wholesale and retail, and health and social work.
- A lower share of employment in manufacturing.

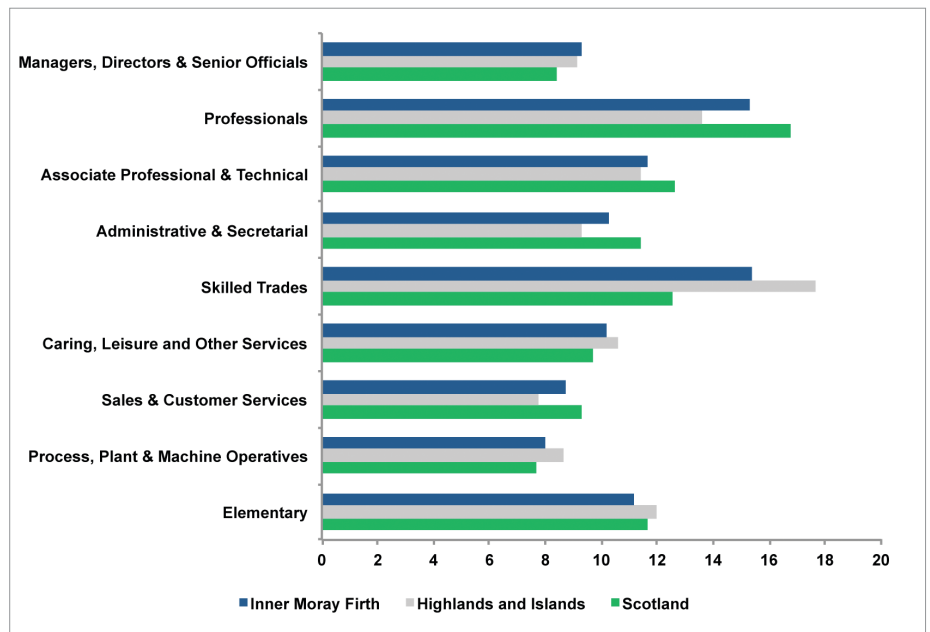
**FIGURE 6: EMPLOYMENT BY INDUSTRY (%), 2011**



Source: Census 2011

Figure 7 presents the share of 2011 employment by occupation and shows that the Inner Moray Firth had a very similar profile to the Highlands and Islands and Scotland. Compared to Scotland as a whole, and although the differences are not as large as comparing the Highlands and Islands with Scotland, the Inner Moray Firth had a proportionately lower share of professional occupations and a higher share of skilled trades occupations.

**FIGURE 7: EMPLOYMENT BY OCCUPATION (%), 2011**



Source: Census 2011

## HOURS WORKED

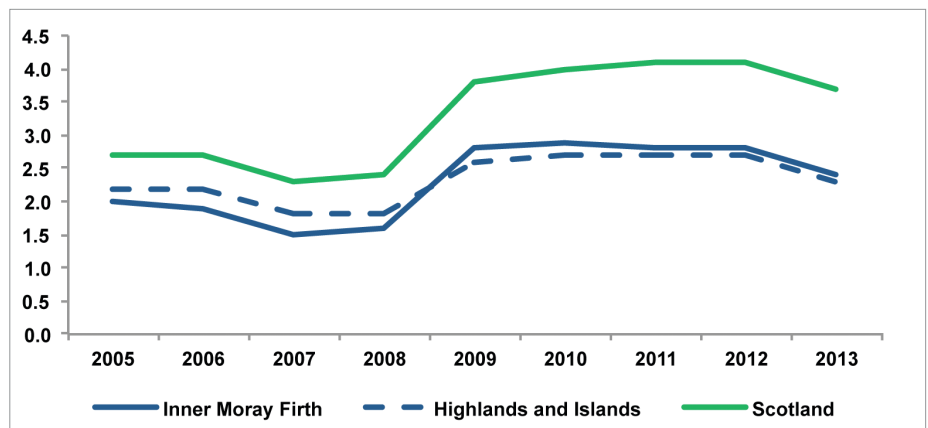
By hours worked, the 2011 Census finds that 14.9 per cent of Inner Moray Firth workers worked more than 49 hours per week, which was less than across the Highlands and Islands (16.1 per cent) but greater than Scotland (11.7 per cent).

## UNEMPLOYMENT

Jobseekers Allowance (JSA) Claimant Count data has been used to analyse unemployment levels. Figure 8 shows the annualised Claimant Count rate from 2005 to 2013.

- The Inner Moray Firth has a Claimant Count rate that is very close to the Highlands and Islands and has been over time. In 2013, both areas had annualised rates of 2.4 per cent.
- The Inner Moray Firth has had a lower Claimant Count rate than Scotland and the gap has widened since 2008. In 2013, Scotland's rate was 3.7 per cent.

**FIGURE 8: CLAIMANT COUNT RATE OF 16-64 YEAR OLDS (%), 2005-2013**



Source: NOMIS Claimant Count data

Note: Annualised data; datazone data available from 2005.

Figure 9 presents annualised Claimant Count data by gender, age and duration of claim for 2013. It shows:

- The male Claimant Count rate in the Inner Moray Firth (3.0 per cent) was more than double the female rate (1.3 per cent).
- The 16-24 year old Claimant Count in the Inner Moray Firth (3.1 per cent) was below the Highlands and Islands (3.5 per cent)

and Scotland rates (5.4 per cent).

- Amongst 25-64 year olds the Inner Moray Firth Claimant Count rate (2.0 per cent) was in line with the Highlands and Islands rate (2.1 per cent) and below the Scotland rate (3.3 per cent).

**FIGURE 9: BREAKDOWN OF JOBSEEKERS ALLOWANCE CLAIMANTS, 2013**

	Inner Moray Firth		Highlands and Islands		Scotland	
	Number	Rate	Number	Rate	Number	Rate
Male	1,460	3.0	4,580	3.2	87,410	5.1
Female	650	1.3	2,170	1.5	41,250	2.3
16-24	470	3.1	1,570	3.5	34,350	5.4
25-64	1,640	2.0	5,160	2.1	93,980	3.3
Up to 6 months	1,320	-	3,980	-	69,570	-
6-12 months	330	-	1,040	-	22,000	-
1-2 years	260	-	890	-	18,700	-
2 years +	200	-	820	-	18,060	-
Total	2,110	2.4	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

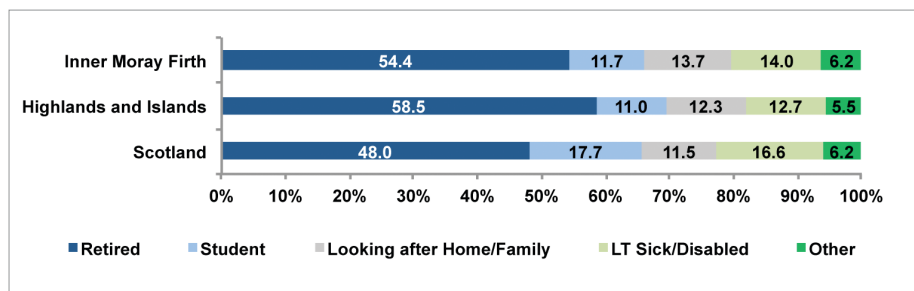
In 2011, some 27.6 per cent of the Inner Moray Firth 16 to 74 year olds were economically inactive, compared with 28.7 per cent across the Highlands and Islands and 31.0 per cent across Scotland.

Figure 10 provides a breakdown of the economically inactive and shows:

- Some 54.4 per cent of the Inner Moray Firth economically inactive 16-74 year old population was retired, which was below the Highlands and Islands proportion (58.5 per cent) but above the Scotland proportion (48.0 per cent).

- The proportion of the Inner Moray Firth economically inactive population who were students was slightly greater than the proportion in the Highlands and Islands, but lower than in Scotland.
- Compared with the Highlands and Islands, the Inner Moray Firth had higher proportions who were looking after home or family or long-term sick or disabled.

**FIGURE 10: BREAKDOWN OF ECONOMICALLY INACTIVE 16 TO 74 POPULATION (%), 2011**



Source: Census 2011

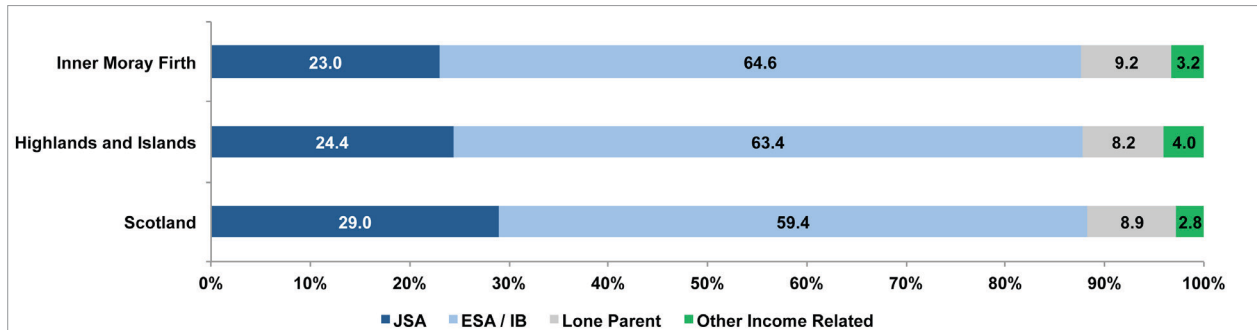


## OUT OF WORK BENEFITS

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 9,160 people aged 16 to 64 years in the Inner Moray Firth claiming out-of-work benefits.
- This equates to 9.3 per cent of the working age population, which was in line with the Highlands and Islands (9.2 per cent) and below the Scotland rate (12.9 per cent).
- Figure 11 shows the breakdown of out-of-work benefit claimants by statistical group.

**FIGURE 11: OUT-OF-WORK BENEFITS CLAIMANTS BY STATISTICAL GROUP (%), MAY 2013**



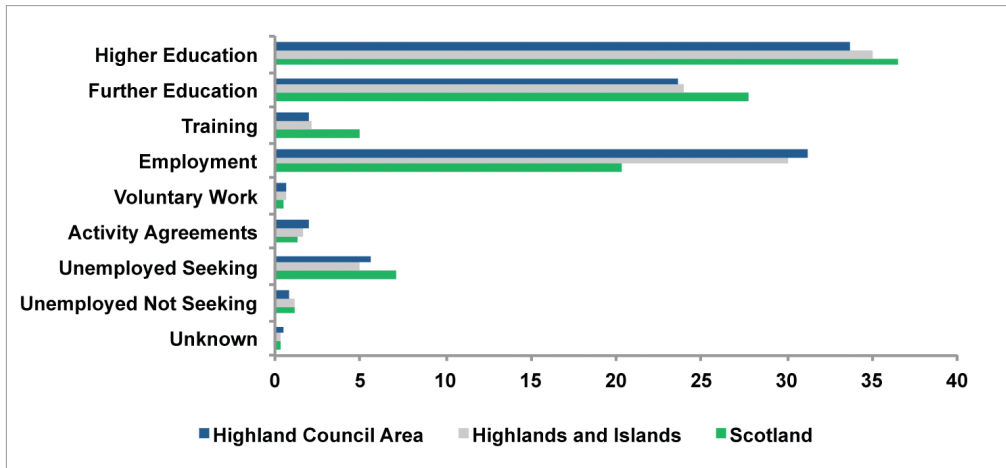
Source: NOMIS DWP WPLS data

## 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. Only the adult qualifications data is available below local authority area level (i.e. is specific to the Inner Moray Firth). The school attainment and destinations data below refers to the Highland Council area:

- In 2011/12, some 81.4 per cent of Highland Council S4 pupils achieved 5 awards at SCQF Level 4 and above. This was below the rate for the Highlands and Islands (82.9 per cent) but above that for Scotland (80.2 per cent).
- In 2012/13, some 93.1 per cent of Highland Council area school leavers entered a positive destination, which was marginally below the 93.5 per cent for the Highlands and Islands but above the 91.4 per cent for Scotland.
- Figure 12 shows the breakdown by destination type and shows that the Highland Council area profile is very close to the wider Highlands and Islands area and quite different from the Scotland profile. For example:
  - A higher proportion in the Highland Council area (31.2 per cent) entered employment than the Scottish average (20.4 per cent).
  - A lower proportion in the Highland Council area (23.7 per cent) entered further education than the Scottish average (27.8 per cent).

**FIGURE 12: SCHOOL LEAVER DESTINATIONS (%), 2012/13**



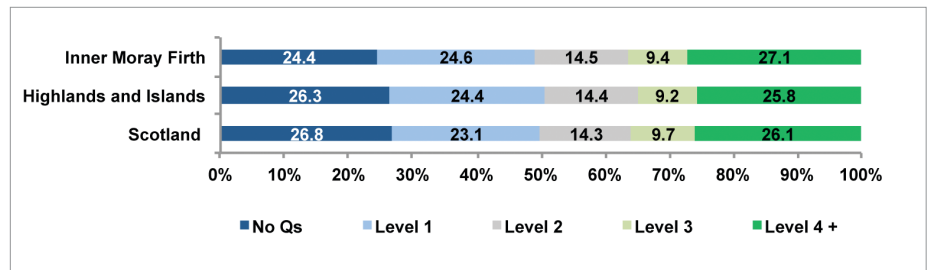
Source: Skills Development Scotland SLDR 2012/13 Initial Destination Figures  
 Note: School attainment and destination figures are only available for local authority areas, therefore the Highlands and Islands figures include all of Argyll and Bute.

The 2011 Census provides information on the highest qualification level held by people aged 16 and above. Figure 13 shows that the Inner Moray Firth had a higher qualified adult population than the Highlands and Islands and Scotland.

- Some 24.4 per cent of the Inner Moray Firth adult population had no formal qualifications. This was below the proportions for the Highlands and Islands (26.3 per cent) and Scotland (26.8 per cent).

- At Level 4 and above, 27.1 per cent of the Inner Moray Firth adult population were qualified to this level, which was above the Highlands and Islands (25.8 per cent) and Scotland (26.1 per cent) proportions.

**FIGURE 13: 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.

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## Health and Wellbeing

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

- On perception of general health, some 84.6 per cent of the Inner Moray Firth population stated that their health was 'very good' or 'good'. The rates for the Highlands and Islands and Scotland were 83.8 per cent and 82.2 per cent respectively.
- Some 17.9 per cent of the Inner Moray Firth 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 8.8 per cent of the Inner Moray Firth population provided unpaid care on a weekly basis. This was marginally below the rates for the Highlands and Islands (9.1 per cent) and Scotland (9.3 per cent).

## Ethnicity and Migration

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

- Some 98.4 per cent of the Inner Moray Firth 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 81.9 per cent in the Inner Moray Firth were 'white Scottish', which was in line with the Highlands and Islands proportion of 81.0 per cent and below the Scotland proportion of 87.4 per cent. The difference is due to the higher proportions of the Inner Moray Firth (13.5 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). A further 3.8 per cent in the Inner Moray Firth defined themselves as 'white Polish' or 'white other'.
- Some 6.4 per cent of the Inner Moray Firth population were born outside of the UK, which was above the Highlands and Islands proportion (5.2 per cent) but below the Scotland proportion (7.0 per cent).

## FURTHER INFORMATION

[www.hie.co.uk](http://www.hie.co.uk)

For any enquiries relating to this area profile, please contact:

### **Heather Smith**

Research Officer

**E** [heather.smith@hient.co.uk](mailto:heather.smith@hient.co.uk)

### **Nicky Sobey**

Economist

**E** [nicholas.sobey@hient.co.uk](mailto:nicholas.sobey@hient.co.uk)

### **Claire Ross**

Senior Economist

**E** [claire.ross@hient.co.uk](mailto:claire.ross@hient.co.uk)



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