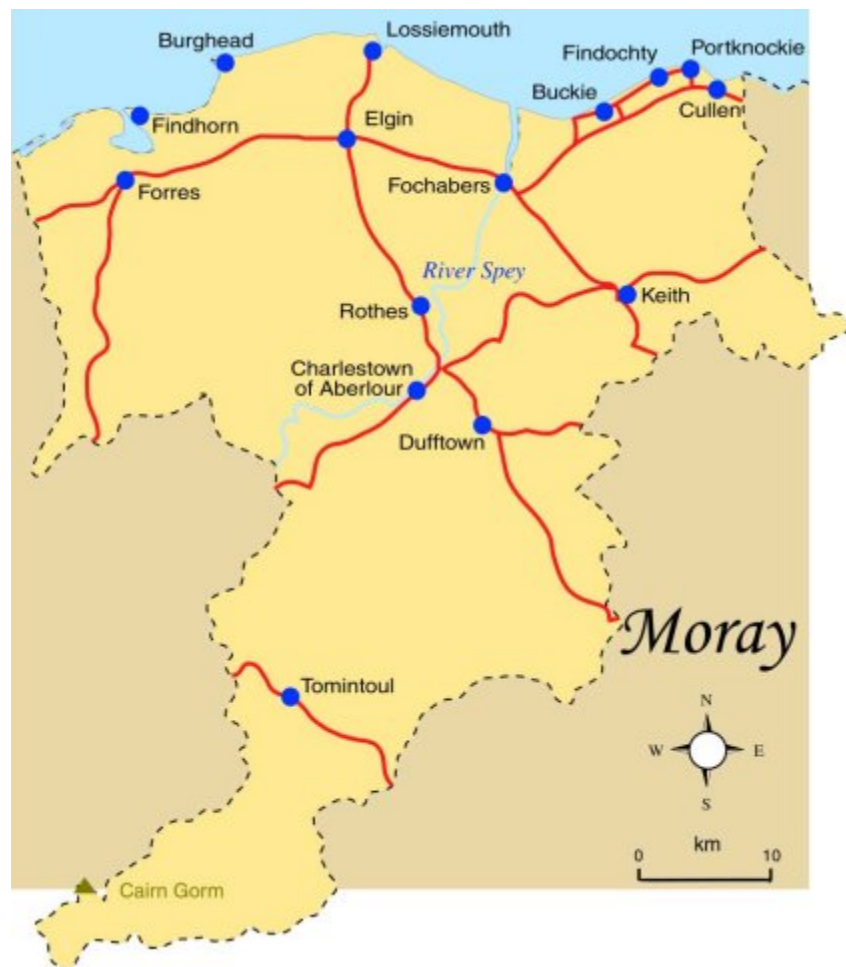


MORAY COMMUNITY PLANNING THEME WEALTHIER & FAIRER



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STRATEGIC ASSESSMENT

2008/09

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Introduction

This is the first strategic assessment in relation to the Moray Community Planning theme Wealthier and Fairer. It will inform a wider process designed to support strategic decision-making in relation to managing risks, setting priorities and allocating resources. The aim is to help Moray's Community Planning Wealthier and Fairer Strategic Group to achieve not only its own outcomes and objectives but also those set by the Moray Council administration and the Scottish Government, ultimately making Moray a wealthier and fairer place to work and live.

The information and analysis contained within this report will be most effective when combined with the knowledge and local expertise that exists within the Community Planning Wealthier and Fairer Strategic Group and across partner agencies. The result will provide a firm foundation for developing the Community Planning Wealthier and Fairer Strategy 2008-2011.

The assessment is divided into 3 main themes in order to ensure a wide range of Community Planning Wealthier and Fairer issues are considered. The themes are:

- Economic Activity
- Employment
- Culture

For each of the 3 themes, the current picture is described along with any emerging trends and future considerations. Recommendations are included for consideration only.

The most recent available data is used and where possible this has been sourced independently to provide an unbiased picture. For some topics, it was not possible to obtain ideal data, either because it is not collected or not yet available at Moray level. In these cases, data has been obtained from an appropriate source and analysed to provide an indication of the situation in Moray. Where available and relevant, the results of surveys have been included to exemplify the perceptions held by local residents.

A Profile of Moray

In terms of landmass, Moray is the 8th largest Council area in Scotland, covering an area of 2238 square kilometres [1], from the Cairngorm Mountains in the south to the coast of the Moray Firth in the north. The area is mostly rural comprising 70% of open countryside and a further 25% of woodland [2].

The population of Moray was 86,870 in 2007 – this was just 1.7% of the Scottish population. The average population density is low at just 39 people per square kilometre compared to a Scottish average of 66 per square kilometre [1]. However, approximately 57% of the population live in the 5 main towns of Elgin, Forres, Buckie, Lossiemouth and Keith [3], where the population density is approximately 2500 people per square kilometre [4].

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. By comparison, Aberdeenshire has 8 data zones in the 20% most deprived and Angus has 9, representing 2.7% and 6.3% of their data zones respectively. 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. This compares with 42.5% of data zones in Aberdeenshire and 26.1% in Angus [5].

Prosperity

The average gross weekly wage in Moray is the lowest in Scotland, at £377.30. The comparator authorities of Angus and Aberdeenshire are ranked 11th and 7th in Scotland respectively (the highest wage ranking 1st), with average gross weekly wages of £447.50 and £473.10 [6]. The SIMD states that 9.3% of Moray is income deprived, compared with 11.5% in Angus and 7.4% in Aberdeenshire [5]. There are no compelling differences between the 3 authorities in terms of the division of those in employment by occupation or industry [6].

The working age population accounts for approximately 61% of the total population of Moray and around 82% of the working-age population are economically active. This represents around 50% of the total population. 78% of the working-age population are in employment, 9% of whom are self-employed. Almost $\frac{3}{4}$ 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 [6].

Of the working-age population that is economically inactive, almost 75% report not wanting a job. In May 2007, 1,130 or 17% of key benefit claimants were claiming job seekers allowance as their main benefit. However, the most common main benefit is incapacity benefit, claimed by 3,500 or 53% of key benefit claimants [6].

There are no compelling differences between Moray, Angus and Aberdeenshire in relation to economic activity or inactivity. However, although the SIMD identifies no data zones in Moray that are in the 15% most employment deprived, 4.9% of Angus and 2% of Aberdeenshire's data zones are in the 15% most employment deprived [5].

Health

Moray's general health is very similar to Angus and Aberdeenshire, with 93% of the population reporting good or fairly good health and just 7% reporting not good health, compared with 92% and 8% respectively for Angus and 93% and 7% for Aberdeenshire [7]. The percentage of the population that has a limiting long-term illness is also very similar to both Angus and Aberdeenshire, representing around 1/6 of the total population in all 3 authorities [7].

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. The picture is very similar in both Aberdeenshire and Angus [7].

The standardised death rate in Moray is slightly higher at 10.5 per 1,000 population than in Angus and Aberdeenshire, both of whose death rates are 9.4 per 1,000 population [8]. 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. Angus and Aberdeenshire show a similar split [8]. 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. This compares with 1.7% of data zones in Aberdeenshire and 1.4% in Angus [5].

Mid-2006 population estimates suggest that 19% of the population of Moray is aged under 16yrs, 61% is of working age and 20% is of pensionable age. This translates as 16052 under 16s, 52952 of working age and 17746 of pensionable age [1]. 2006-based population projections, suggest that the under 16 population will reduce by 9% by 2011, the working age population will increase by 1% but the pensionable population will increase by 10% [9]. This would mean 2011 population numbers of 14607 under 16s, 53482 of working age and 19521 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%. These proportions are similar in both Angus and Aberdeenshire, with no compelling differences. In all 3 authorities, around 63% of the pensionable age group is female.

Education

In Moray in 2006 there were 7133 primary school pupils and 5890 secondary school pupils, an overall drop of around 2% since 2003 (comprising a 4% drop in primary pupils & a 2% rise in secondary pupils). The number of pupils from ethnic minority groups has increased from 171 in 2004 to 197 in 2006. Aberdeenshire has seen a similar reduction in pupil numbers but Angus has seen virtually no change. Both Aberdeenshire and Angus have seen similar percentage increases in numbers of ethnic minority pupils [10]. 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. This compares with 5 data zones in Aberdeenshire, 1.7% of their total, and 8 in Angus, representing 5.6% of their total [5].

In primary schools, absence figures for 2004/05 to 2006/07 are very consistent, accounting for around 4.5% of half days, of which an average of 14% is unauthorised. In 2004/05, truancy accounted for 43% of unauthorised absence; this fell to 17% in 2006/07. Putting these figures in perspective, truancy accounted for 7% of total absence in 2004/05, falling to 2% in 2006/07. These figures are comparable with both Angus and Aberdeenshire except that the reduction that has been seen in Moray's truancy rate is not replicated in Angus [11].

In secondary schools, the absence rate has risen slightly, from 7.6% of half days in 2004/05 to 9.2% in 2006/07. Of this, the proportion of unauthorised absence has increased from 22% to 29%, although this fell from 32% in 2005/06. In 2004/05, truancy accounted for 59% of unauthorised absence, falling to 38% in 2005/06 and then rising to 44% in 2006/07. Despite this fluctuation, truancy has consistently accounted for around 13% of total absence in each of the last 3 years. Moray's total and unauthorised absence rates are comparable to both Angus and Aberdeenshire. However, in both of these authorities truancy accounts for a higher proportion of unauthorised absence than in Moray, at around 72%. In Aberdeenshire truancy accounts for about the same proportion of total absence as in Moray but in Angus, it accounts for around twice the proportion of total absence [11].

Between 2003/04 and 2005/06, the rate of exclusions in Moray's primary schools has remained fairly constant at 12 per 1000 pupils. This is similar to Angus but slightly higher than Aberdeenshire, although this difference reduced over the period. 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. In 2005/06, Moray's rate was similar to both Angus and Aberdeenshire following a fall in Angus and a rise in Aberdeenshire. 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. This is higher than Angus, which has had no pupils removed from the register and better than Aberdeenshire where pupils removed from the register represent approximately 2% of total exclusions [12].

Of 1072 school leavers in Moray in 2006/07, 85% went on to further/higher education, training or employment, 12% 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. Both Aberdeenshire and Angus have slightly higher proportions going into further/higher education, training or employment, at around 90% each, although the split is slightly different to Moray, with more going into further education and less into employment. Slightly less than in Moray were unemployed but seeking employment or training, while about the same proportion as Moray was unemployed and not seeking employment or training [13].

Housing

The total number of dwellings in Moray in 2006 was 40,728, a rise of 3% since 2003. There have been similar rises in Aberdeenshire and Angus. The ratio of dwellings to total population is the same in all 3 areas at 1:2 [10]. In Moray, approximately 63% of the population live in owner-occupied accommodation, which is slightly lower than both Aberdeenshire and Angus at 74% and 68% respectively. In contrast, Moray has the highest percentage of people both renting from the Council and renting privately at 17% and 11% respectively. Moray has a similar proportion of the population living in lone parent families as both Aberdeenshire and Angus, at 8%, and a similar

proportion of people living alone, at 12%. Nearly half of those living alone in all 3 authorities are aged 65 and over [7].

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 mean house sale prices in Aberdeenshire and Angus also rose, by 88% and 93% respectively, while house sales rose by 23% and 26% respectively. The median house sale price in Moray nearly doubled, from £47,000 in 2001 to £93,000 in 2006 and similar increases were seen in both Aberdeenshire and Angus. The median price being lower than the mean price is reflective of the large proportion of band A-C dwellings in Moray, approximately 70%. In Angus, approximately 65% of dwellings are band A-C but in Aberdeenshire, the proportion is much lower at approximately 45%. Correspondingly, the proportion of dwellings in bands F-H is small in Moray and Angus, at approximately 5% and 7% respectively, while in Aberdeenshire, the proportion is higher at nearly 20%. Between 2003 and 2006 in all 3 authorities, the proportion of dwellings in bands A-C fell slightly, while the proportion of dwellings in bands F-H rose slightly [10].

There are no data zones in Moray that are within the 15% most housing deprived in Scotland and this is the same for both Angus and Aberdeenshire. However, 4 of Moray's data zones are within the 20% most housing deprived in Scotland, 2 in Elgin, 1 in Forres and 1 in Lossiemouth, whereas neither Angus nor Aberdeenshire have any data zones within the 20% most housing deprived [5].

Recorded crime in Moray

In Moray in 2006/07 the total number of crimes recorded increased by 4% from 2005/06 compared with a 7% decrease in Aberdeenshire and a 3% rise in Angus. In Scotland the number of crimes recorded in 2006/07 increased by less than 0.5% from 2005/06. The rate of crimes in Moray in 2006/07 was higher at 680 per 10,000 population than in both Aberdeenshire and Angus, at 446 and 558 per 10,000 population respectively. However, Moray was better than Scotland in this regard, where the rate was 819 per 10,000 population. The total number of crimes recorded in each of the last 10 years shows a slightly increasing trend in Moray, as it does in Aberdeenshire. In contrast, Angus shows a slightly reducing trend, as does Scotland as a whole [14].

The percentage of crimes cleared up in Moray fell by 2% to 41% in 2006/07, compared with a 7% rise to 42% in Aberdeenshire and a 1% rise to 61% in Angus. 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 Aberdeenshire and a slightly increasing trend in Angus and Scotland as a whole [14].

Within Moray there are 12 data zones in the 15% most crime deprived, representing 10.3% of data zones in Moray. This is worse than both Aberdeenshire and Angus, who have 4% and 7.7% respectively of their data zones within the 20% most crime deprived [5].

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. Compared with Aberdeenshire,

Moray's ranking was equal or worse in all crime categories and compared with Angus, Moray's ranking was better in 2 categories, equal in 1 and worse in 2. In all crime categories, Moray's ranking was better than or equal to Scotland's.

Key Community Planning Wealthier and Fairer Sub-Themes

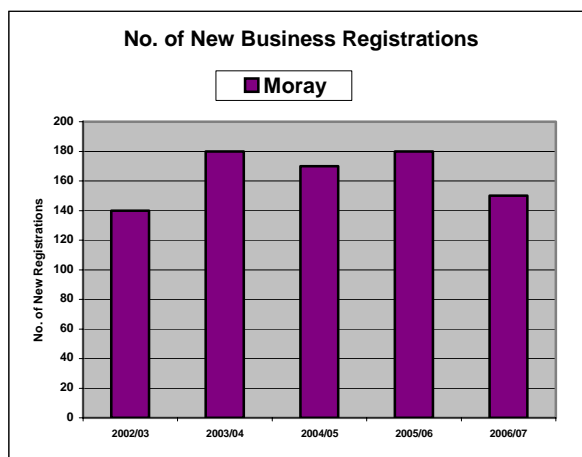
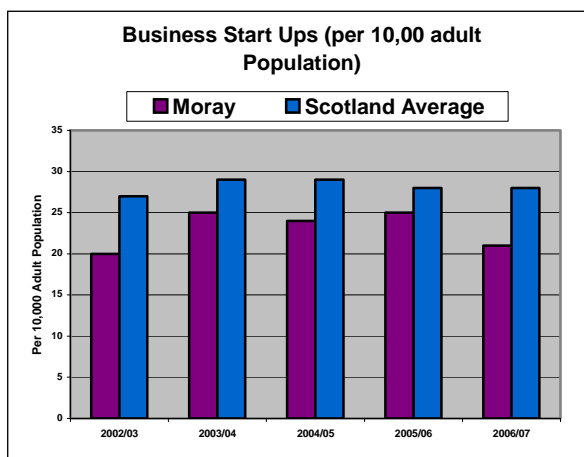
1) Economic Activity

This theme covers 3 main areas: Environment for new and expanding business, Exports and GDP, and Transport Infrastructure.

a) Environment for new and expanding business

Moray continues to support a number of well-established businesses, including successful global businesses such as Walker's Shortbread, Baxter's soups and preserves, Johnston's textiles and many malt whisky brands from the distilleries on Speyside. Moray has also a significant number of family-based companies where headquarters, or at least major offices, remain in the region, sometimes after many generations. These include Forsyths engineering, Jones timber, Baxters foods, Walkers shortbread, Johnstons textiles, and several of the distilleries that are not owned by major international groups.

There were approximately 2,615 VAT registered business enterprises operating in Moray in 2006 [6], 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 [15].



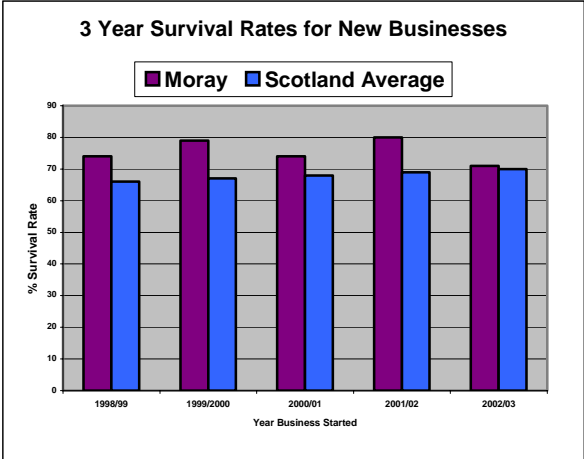
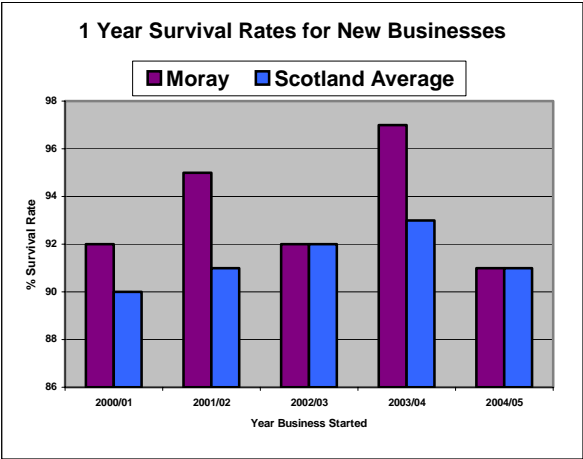
The Council is the main provider of industrial sites and premises to let in Moray. At 31 March 2008 113 serviced industrial sites totaling 20.55 hectares had been leased to businesses. 129 of the Council's 130 industrial premises were occupied representing 98.9% of the total floor area of 27,576 square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

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 [16].

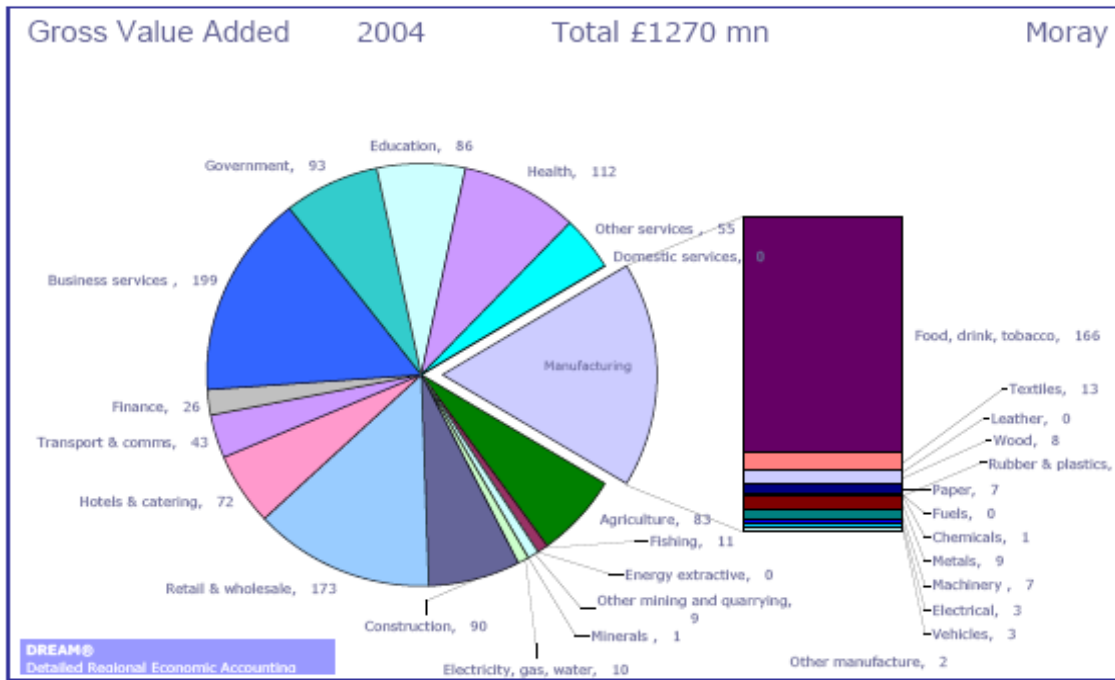
The introduction of the Small Business Bonus Scheme (replacing Small Business Rate Relief Scheme) on 1st April 2008 will provide up to 80% taxation relief for small businesses where their property rateable value is below £15,000. This should reduce the rates burden helping those smaller businesses that have potential to grow.

The number of businesses surviving beyond their first and third year of trading in Moray also reflects favorably against the national average. 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 [17]. The trend shows yearly fluctuations that appear to mirror the trends in the number of new business VAT registrations and business de-registrations above.



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 [18]. However, 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. 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 [15].

Figure 18 Value Added by industry



Source: Moray Economic Audit 2007

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. It is anticipated around 200 new jobs will be created during the investment period over the next few years, most of which will be based in Moray [19]. Glenmorangie, another major whisky company, are to sell Glen Moray distillery in Elgin. Job losses are anticipated, however the buoyant whisky sector should minimise any negative impact to Moray.

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 [20]. 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 [21].

Summary & Emerging Trends

- Moray continues to support a number of successful global businesses and well-established family-based companies.
- Capacity for continuing business growth is constrained by shortage of serviced industrial land and premises.
- Moray has a relatively low rate of business start up

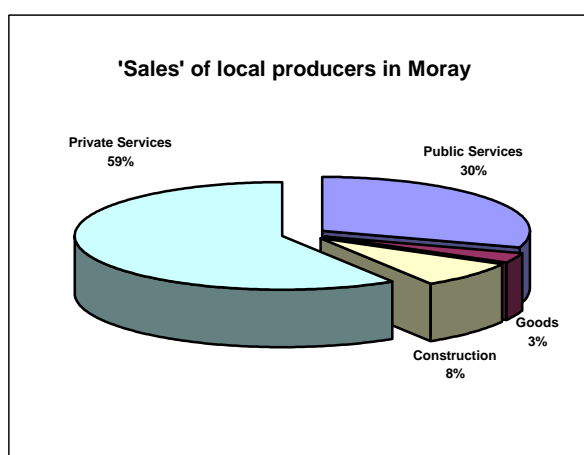
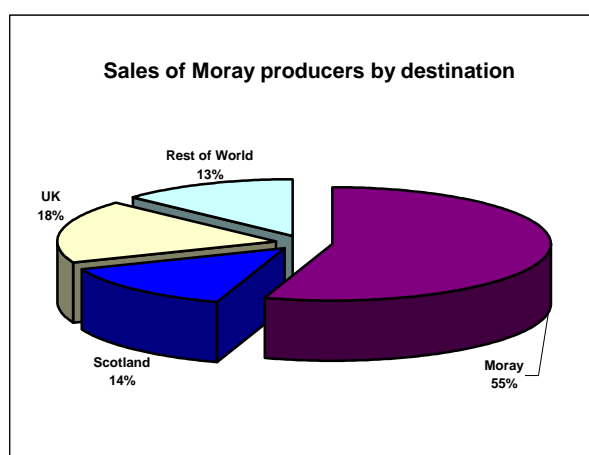
Future Considerations

- Develop our entrepreneurial behaviour – Provide greater opportunities and support to people to start up their own business.
- Need to acknowledge that there is a shortage of premises and that in the absence of private sector investment the public sector must respond to fill the gap.
- Incentives – Propose subsidies providing the opportunity for new businesses to secure suitable premises without tying up capital to purchase premises or committing to long-term leases.
- The designation of Business Parks in the emerging Local Plan provides a significant opportunity for growth.
- The reduction of personnel in both the Moray RAF bases.

b) Exports and GDP

Aim is to raise Scotland's GDP growth rate to the UK level by 2011. To match the GDP growth rate of the small independent EU countries by 2017. Aim is to rank in the top quartile for productivity amongst our key trading partners in the OECD by 2017. Aim is to grow exports at a faster average rate than Scottish GDP in current prices over the term of this Parliament.

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 [15].



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 [15]

Summary & Emerging Trends

- Moray currently supports a stable economy, but one which is vulnerable to both defence reductions and global competition.

Future Considerations

- There is a need to invest diversifying the economy and create a stronger knowledge base economy to drive up incomes and GVA.

Recommendations

- Commitment from the Council and HIE to invest in sites and premises to meet demand for suitable industrial sites and business premises. (The Capital Plan makes provision for industrial estate development projects so this is a recommendation that can be readily met.)

c) Transport Infrastructure

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. [15]

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 [22]. From 2004 to 2007 vehicles in the Moray area have travelled an average total of over 718 million vehicle kilometres per year. 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% [23].

There is a high dependence on car/road journeys and Moray has 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 [24]. 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 [24]. 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’.

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% [24]. 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 [24].

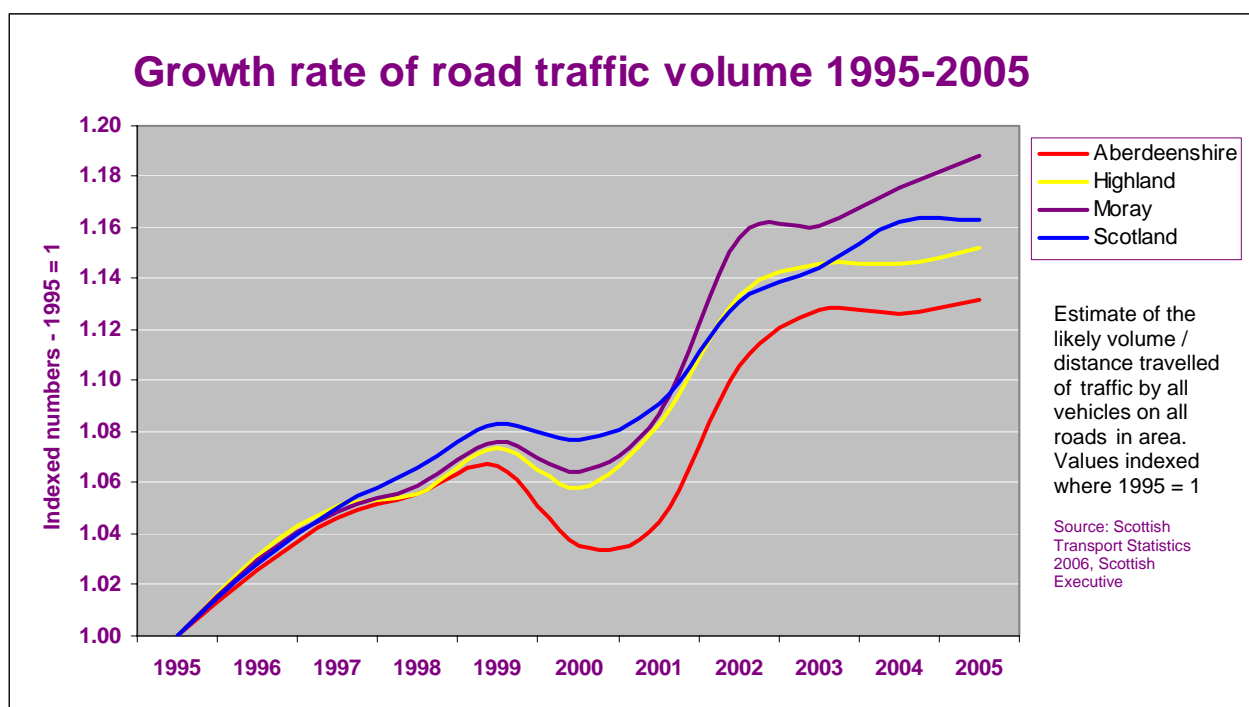
The Moray Citizen Panel Survey on Travel and Transport (May 2006) [25] mirrors the data on public transport usage in Moray from the Scottish Household Survey (previous 2 paragraphs). Respondents to the Citizen Panel survey noted ‘the infrequency of bus services’ and ‘the lack of appropriate services’ as the most commonly mentioned barriers to using public transport to work and to a lesser extent the cost of such services. They also noted that for 2 in 5 respondents having a car for their work was important due to the unsuitable public transport for the hours of their work.

Rail and bus service 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. This has increased by over

24% to 405,082 in 2006/07, however a drop is noted for all Moray stations from 2005/06 to 2006/07 [26]. Moray is also 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. The Moray Citizen Panel survey showed that 54% of respondents were more likely to consider using public transport for longer distance travel (greater than 10 miles). However, this would be on the proviso that sufficient services were available. Again respondents identified issues with the lack of integration of public transport services (i.e. bus and train times linked), affordability of buses and the frequency of service [25].

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 [7].

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 [27]. Traffic volumes are 10% higher during the peak summer holiday season. Over the past ten years road traffic has grown by almost 19%. This is greater than the both the Scottish average (16%) and that for the two neighbouring authorities.



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%.

The high dependency on car/road journeys for public and freight and the need for improved transport infrastructure to accommodate increasing traffic volumes is reflected in the increase in delayed journeys due to travel congestion. Journey times in and around Elgin have increased by 50% over the last ten years. Moray has put together a £2million bid to get people moving by making cycling, walking, train travel and car sharing schemes more attractive [27]. 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 [25].

Although Moray's major companies are key exporters, both abroad and to distant parts of the UK and Scottish economies, many smaller businesses link to neighbouring areas including Aberdeen, Aberdeenshire and The Highland Council area. 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 [20].

An independent research report commissioned by HITRANS [28] to identify the economic benefits of bypassing Elgin, Nairn and Keith on the A96 found that the bypasses would boost the regional economy by around £107million each year and cut up to 30 minutes from local and long distance journeys. The anticipated reduction in congestion would also lead to savings of over £21million each year for users of the A96 as a result of shorter journey times.

Fuel Poverty in Moray is 21% in comparison to Scotland at 13% with access to services such as transport, education, shopping and petrol stations in comparison to Scotland is considerably poor, particular in the rural areas of Moray and presents social and economic disadvantage [10].

Summary & Emerging Trends

- High dependency on cars, with both a high ownership rate and daily use rate.
- Lower than average use of public transport in travelling to work.
- Lack of and infrequency in service of buses and trains identified as main reason for not using public transport services.
- Increasing volumes of traffic on major transport routes through Moray.

Future Considerations

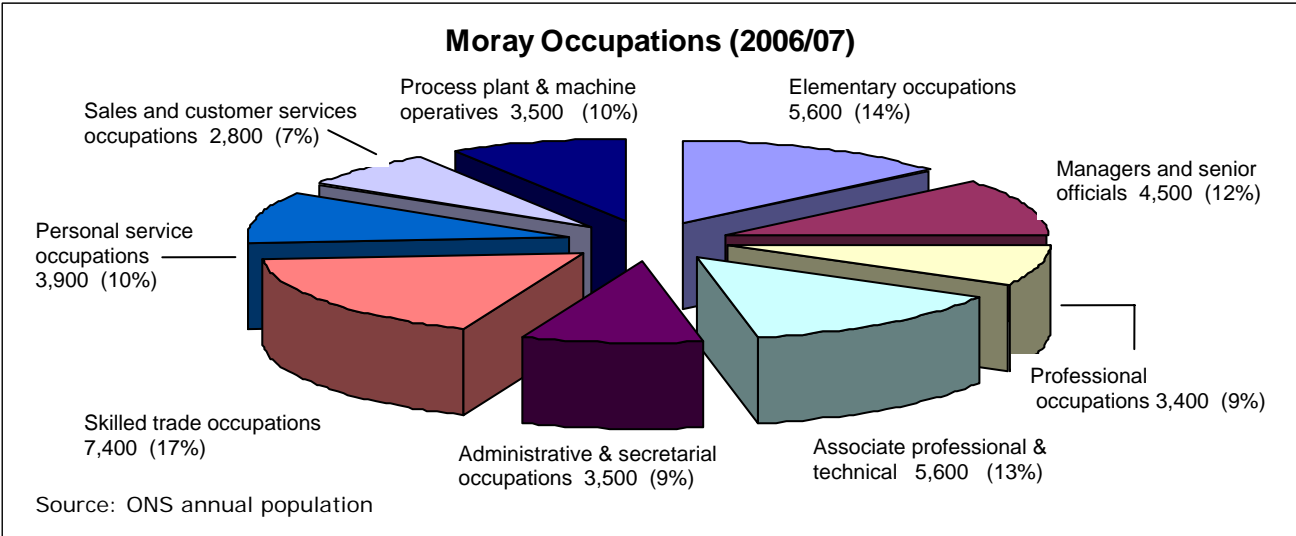
- Work with HITRANS to support the bypass of the townships of Elgin and Keith, reducing journey times and bringing future economic benefits.
- Identify and encourage adequate transport links within and outwith Moray to serve business and tourism.
- Improve the transport infrastructure and make every effort to encourage and facilitate the use of alternative forms of transport to the private car.
- Increase alternative travel schemes such as improving cycle paths and increasing cycle storage facilities, increase bus and train services with appropriate timetabling.
- Improve road, rail, air and sea links to the rest of Europe.

2) Employment

a) Employment Structure

The population of Moray has grown in the last 25 years but most of this growth has been fuelled by the increase in armed forces personnel and supporting staff; more recently also by migrant workers. 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 [29]. 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) [6]. The position against median Scottish Gross Income in 2005 was 88.5%.

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 the manufacturing base in Moray accounting for 17 per cent 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 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.

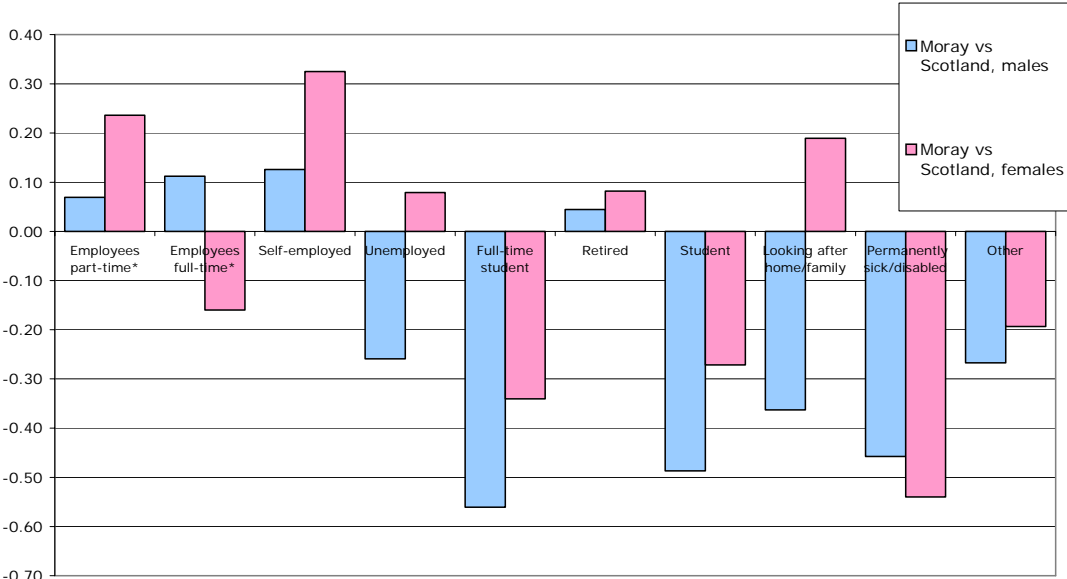


To an extent the skills and qualifications of the Moray labour-force reflect the fact that the Moray economy is dominated by the service sector, and in particular public services. There are fewer managerial and professional jobs (21%) compared with Scotland (26%) and many more people work in skilled 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.

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.

Distinctive patterns of economic involvement



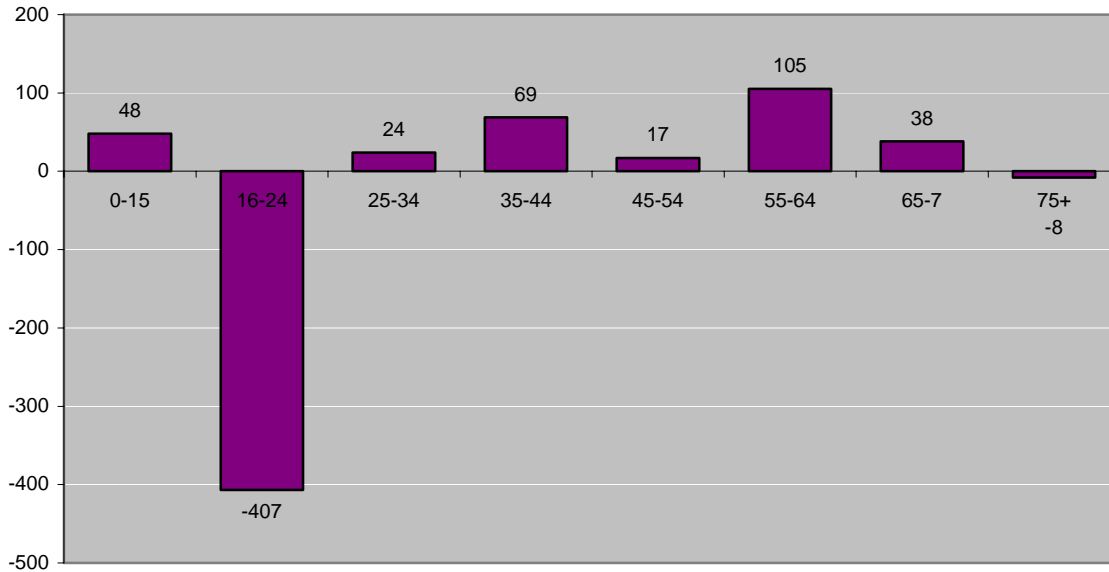
Source: Census 2001, KS09
 General Register Office for Scotland, © Crown copyright 2003

b) Further Education

There is a low level of return of young people to Moray who leave the area to enter higher education but do not 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. It has emerged that there is currently a problem recruiting graduate dentists for Moray.

Further Education and training facilities are provided by Moray College (part of UHI) but the area loses a high proportion of its more able young people to universities, colleges and jobs in Scotland’s cities. 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 (35%) than in Scotland as a whole (28%) [10]. Fewer young people enter training or are unemployed. The high level of school leavers going straight into employment is reflected both in a workforce skills base with a weak attainment of higher level qualifications (13%) [10] and the low median gross weekly earnings figure as school leavers often enter into low or semi-skilled employment.

Net Migration by Age



Source: Census 2001 Crown Copyright.
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The above graph highlights the high outward migration of young adults. 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 [20].

c) Benefits and Unemployment

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 [30].

In Moray the percentage of young people who leave school actively seeking employment or training has increased from 9% (2004/05) to 12% (2006/07). The numbers who leave school with no job and are not seeking employment or training has decreased from 5% to 2% over the same period [31]. Moray is just above the national average for both indicators. 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.

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 [15].

d) Employment Deprivation

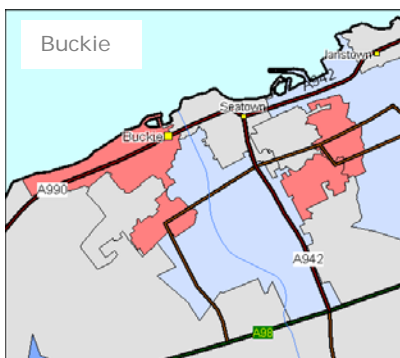
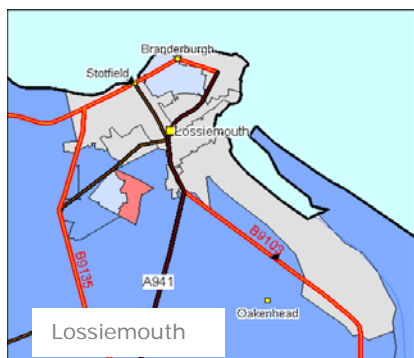
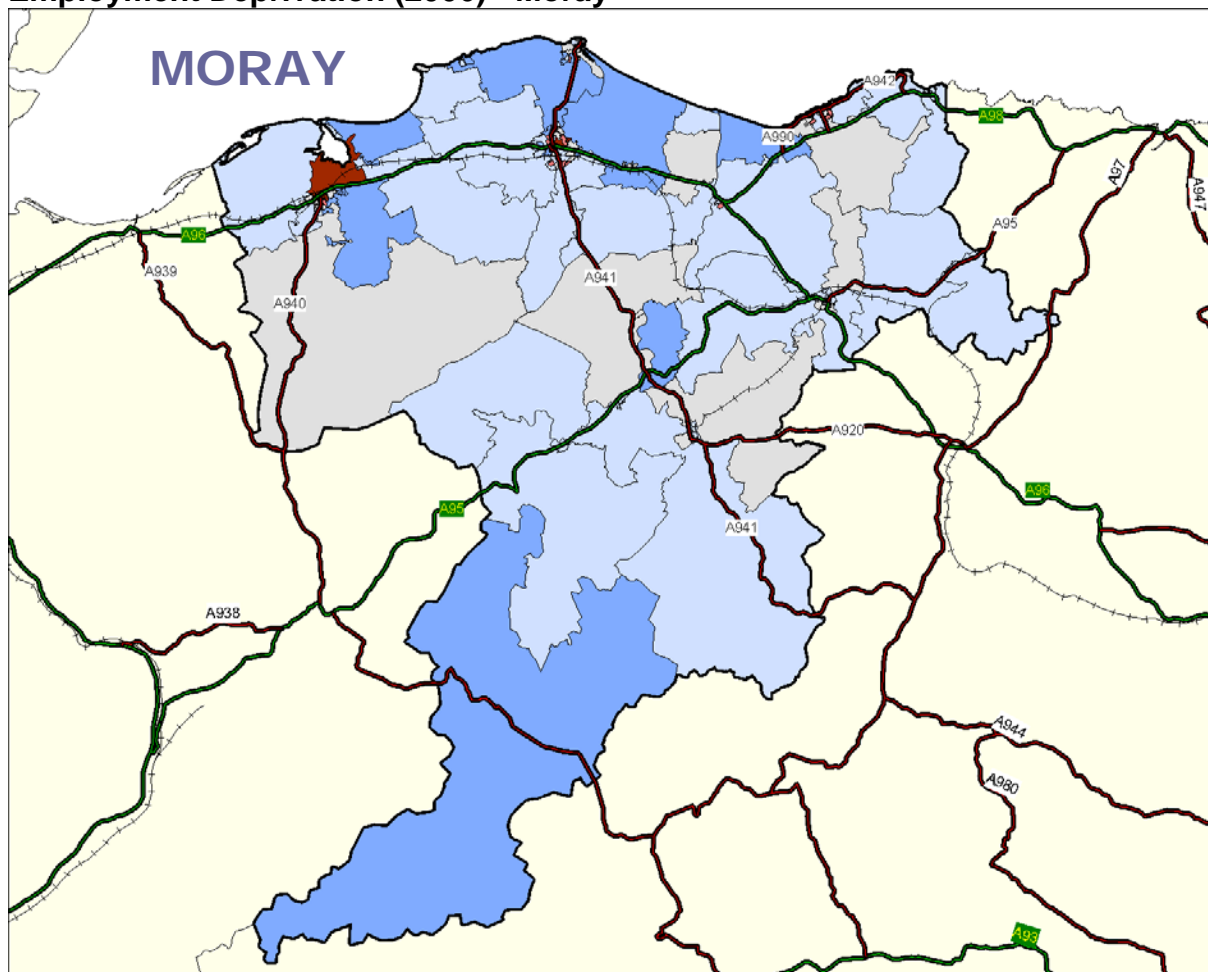
Employment Deprivation is intended as a measure of 'enforced exclusion from the world of work' and as such concerns the proportion of working age people who want to work but due to unemployment, ill health or disability are excluded from the labour market. As with income deprivation, the more rural areas of Moray have a lower incidence of employment deprivation.

There are a number of zones in the 20 per cent of least deprived areas in Scotland. These include rural areas to the north of Elgin, the east of Forres and the southern extremities of Moray around Tomintoul.

Within the towns, many parts of Lossiemouth have low levels of employment deprivation as do southern parts of Forres and areas to the north and east of Elgin.

The areas with the highest instance of employment deprivation are those which also suffer from income deprivation, namely northern Forres, central parts of Elgin and Buckie as indicated below.

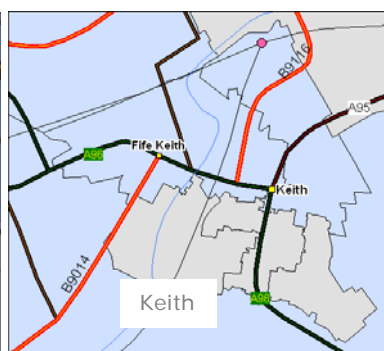
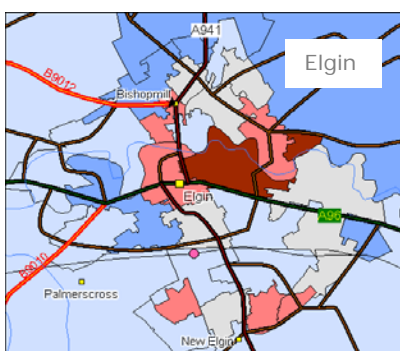
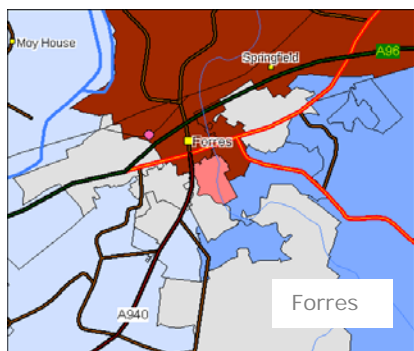
Employment Deprivation (2006) - Moray



Source: Scottish Index of Multiple Deprivation 2006, Scottish Executive

Legend
Employment domain rank

- 5,205 to 6,505 (least deprived in Scotland)
- 3,904 to 5,204
- 2,603 to 3,903
- 1,302 to 2,602
- 1 to 1,301 (most deprived in Scotland)



Overall, 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. 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 percent worst areas in Scotland in terms of income deprivation [15].

As with the employment and income indicators, the lowest levels of health deprivation are to be found in the rural areas, particularly those that are more accessible and so are likely to be appealing to commuters. 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 [15].

e) Literacy and Numeracy

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.

Demand for adult literacy and numeracy 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, in the first quarter of 2008/09 the number has already reached 93 which shows a marked increase from the same period last year.

A national Adult Literacy and Numeracy in Scotland survey is currently being developed by the Scottish Government with the anticipated first results available in mid 2009, but it is unlikely that data will be available for all local authorities at this point.

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

Summary & Emerging Trends

- Relative high employment rate.
- Low average median gross weekly earnings for full time employees.
- Managerial and professional occupations and the business services sector employment are underrepresented.
- Employment structure dominated by public sector jobs.
- Food and drink are the dominant focus of the private sector.
- Young people are leaving the region in increasing numbers, mainly to pursue further education. Many do not return to the area seeking employment.

Future Considerations

- Initiatives to address youth out-migration.

- Invest in creating a stronger knowledge based economy to drive up incomes and GVA and to provide a wider range of jobs for young people and those who wish to move to the area.
- Increase opportunities for employment of vulnerable adults.

Recommendations

- Grow our own talent for those school leavers moving directly into work (Increase number of modern apprenticeships, create opportunities for More Choices / More Chances young people, increase the number of non seasonal permanent employment opportunities)

3) Culture

a) Cultures/Communities/Identities

Moray has a rich and varied natural and cultural environment including spectacular coastline and countryside, a strong whisky heritage and an exciting outdoor activities scene.

Moray has distinctive local traditional industries with high international profile (Single Malt Whisky and food production). It also has a healthy traditional music scene. 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. Moray is home to the Malt Whisky Trail and has an outstanding whisky heritage that promotes a strong and unique cultural landscape that is recognised throughout the world. The Spirit of Speyside is widely recognised as the pre-eminent whisky festival in Scotland. In 2006 the Spirit of Speyside Whisky Festival (including the Spirit of Whisky Awards) added some £547,000 of additional spending in the area and generated 1,130 net additional bednights – an overall increase on 2005 figures.

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, Ceilidh 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.

Visit Scotland describe Grampian, which includes Moray, as Scotland's Whisky and Castle Country. The table below highlights the significance of the food and drinks sector, in particular whisky, to Moray's tourism industry. Based on the visitor numbers from 2005, nine out of the fifteen top visitor attractions in Moray were related to food and drink [32].

Top 15 Visitor Attraction in Moray, 2005 (VisitScotland, 2006)

Attraction	Sector	Visitor Numbers 2005	Change on previous year
Baxters Highland Village	Food	195,190	-6.4%
Johnston's Cashmere Visitor Centre	Textiles	164,570	6.9%
Glenfiddich Distillery	Whisky	71,653	-8.2%
Glenlivet Distillery	Whisky	45,730	1.2%
Logie Steading Visitor Centre	Heritage	45,000	12.5%
Elgin Cathedral	Heritage	24,302	-11.1%
Glen Grant Distillery and Garden	Whisky	22,381	3.5%
Pluscarden Abbey	Heritage	18,428	11.6%
Brodie Castle	Heritage	16,738	-26.9%
Biblical Garden	Heritage	16,200	1.3%
Speyside Cooperage Visitor Centre	Whisky	16,000	-11.2%
Dallas Dhu	Whisky	13,511	-11.9%
Macallan Distillery	Whisky	13,000	-13.3%
Tomintoul Museum & Visitor Centre	Heritage	12,999	16.9%
Strathisla Distillery	Whisky	11,411	21.6%
Glenfarclas Distillery	Whisky	10,274	-3.7%

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 [33].

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.

b) The 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.

c) Heritage and Ancestral Tourism

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.

The Ancestral Moray Development Strategy baseline report (of August 2007) identified that Moray's ancestral resources are fragmented, held by a number of organisations in Moray and elsewhere. For example key records belonging to Moray are held in Aberdeen due to the absence of suitable heritage centre accommodation in Moray.

In Moray the principal resource holders are: the Council's Local Heritage Service; the Council's Registration Service; Aberdeen and North East Family History Society; Moray Burial Grounds Research Group; and Moray Council's Museums Service and the independent museums.

The report identifies that 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.

The Council is supportive of a five year ancestral tourism strategy, which by 2012 will be worth £20million per annum to the regional economy, will have increased the number of visitors by 30% and will have increased community awareness of ancestral tourism.

A key element in the strategy is the 2009 Year of Homecoming, under the banner of “Moray Connections”. By using the lives of eleven famous people of Moray, from Macbeth to Ramsay MacDonald, heritage and community groups will be involved in events and initiatives that will attract visitors, involve communities and schools, develop an interest in ancestry and crucially attract visitors from Canada due to the Canadian Pacific Railroad connection, the 2 principal founders Lord Strathcona and Lord Mountstephen coming from Moray.

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 have 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) [23].

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.

The Knockando Woollen Mill is a working spinning and weaving mill, which has been in continuous production since c.1784. The Mill is one of the few surviving in the world with the buildings and machinery being A-listed. As part of restoring and securing the future textile production of the Mill, and retaining the tradition and history of textile-making in the area the Mill is the focus of a project seeking to utilise available funding from European, Lottery, Heritage and other funding streams. The project has secured around £3.4 million in funding, with £1.3M coming through the Heritage Lottery Fund and £900,000 from the European Regional Development Fund.

The Knockando Woollen Mill project is one of the many Moray projects that are geared towards meeting the corporate objective to ‘support and develop local businesses, create an environment for sustainable growth’ and to ‘conserve and enhance the natural and built environments through Council policies and actions, and in partnership with other bodies’. As Moray is recognised as a less-favoured region it is eligible to apply for various European funding as well as national funding such as Heritage and Lottery grants to help support and invest in regeneration projects. Current project funding applications that meet the corporate object include:

- Moray Bio-Energy Centre
- Dufftown and Rothes Learning Centres

- Glenlivet Mountain Bike Trails
- Tomintoul Experience
- Findhorn Village Centre
- Skill First

d) Green Tourism

Green Tourism is Sustainable Tourism - tourism which takes into account the needs of the environment, local residents, businesses, and visitors; now and in the future. It is relevant to any tourism enterprise, large or small, rural or urban, whether focused on ecotourism, business tourism or any other tourism niche market. Green tourism businesses are those actively engaged in reducing the negative environmental and social impacts of their tourism operations.

The Glenlivet estate, in the south of Moray, has been awarded a Gold award under the Green Tourism Business Scheme (GTBS), for demonstrating excellence in environmental practice and promoting sustainable tourism. The Glenlivet estate, owned and managed by The Crown Estate since 1937, provides opportunities for sustained employment in agriculture, forestry, sporting and tourism. The development of the estate's community is balanced with the need to protect and enhance the rich natural and cultural heritage. Maintaining this balance preserves the special qualities and characteristics of the countryside that combine to produce the remarkable Glenlivet landscape.

Other 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).

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. 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.

Provide, manage and maintain the Speyside Way long distance footpath and Ranger Services to support access to the countryside and healthy living initiatives. Provide and maintain local and long distance footways and cycleways to support access to the countryside and healthy living initiatives. Encourage less car dependent forms of transport and where appropriate encourage road traffic reduction, walking, cycling and other healthy living initiatives [34].

e) Protection of natural assets

The close proximity of sea, coast and land provides a diverse range of activities with many opportunities for tourism and outdoor recreation. Tourism has, and can, facilitate a wider appreciation of the outstanding natural heritage of the area. There is, though, cause for concern regarding coastal and marine habitats and species, e.g.

the bottlenose dolphin. Agricultural changes, i.e. larger production units have caused a loss of some informal footpath networks [35].

A recent innovative scheme the 'Dolphin Space Programme' encourages people to respect the dolphins' need for space and urges those who want to observe dolphins, whales or porpoises in the Moray Firth to either watch from the shore, or to take boat trips with 'accredited' operators who have agreed to observe a code of conduct. The voluntary programme was developed by the Scottish Wildlife Trust and Scottish Natural Heritage in partnership with the European Union LIFE programme, and represents a novel approach to sustainable wildlife tourism. The recent growth of wildlife cruises in the area reflects a global trend of increased interest in wildlife tourism. In the Moray Firth, cruises can provide communities with an important source of revenue. However, without appropriate management, it is claimed that too many boat trips can cause disturbance to the animals that form the basis of the business [36].

f) Renewable Energy Technologies

Investment in renewable energy technology, in particular onshore wind energy, to meet the Scottish Government's renewable energy targets has and may continue to bring significant investment to the Moray area. 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, Moray could be in line to benefit from future renewable energy investment. The issues faced by The Moray Council are to balance the positive benefits of renewable energy against the possible negative impacts upon the landscape, ecology and amenity value of the local area.

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.

g) Social Issues

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. 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.

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.

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.

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.

Future Considerations

- Maximise the potential benefits from the forthcoming Homecoming events in 2009.
- Further investment in renewable energy technologies.
- Support and drive the application for investment from various eligible funding streams such as European, Heritage and Lottery funding sources.

Recommendations

- Promote Moray as an excellent Place to Live, Learn, Work, invest and do business - 'Build a Life in Moray' to support young people to stay in Moray or move to it.

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