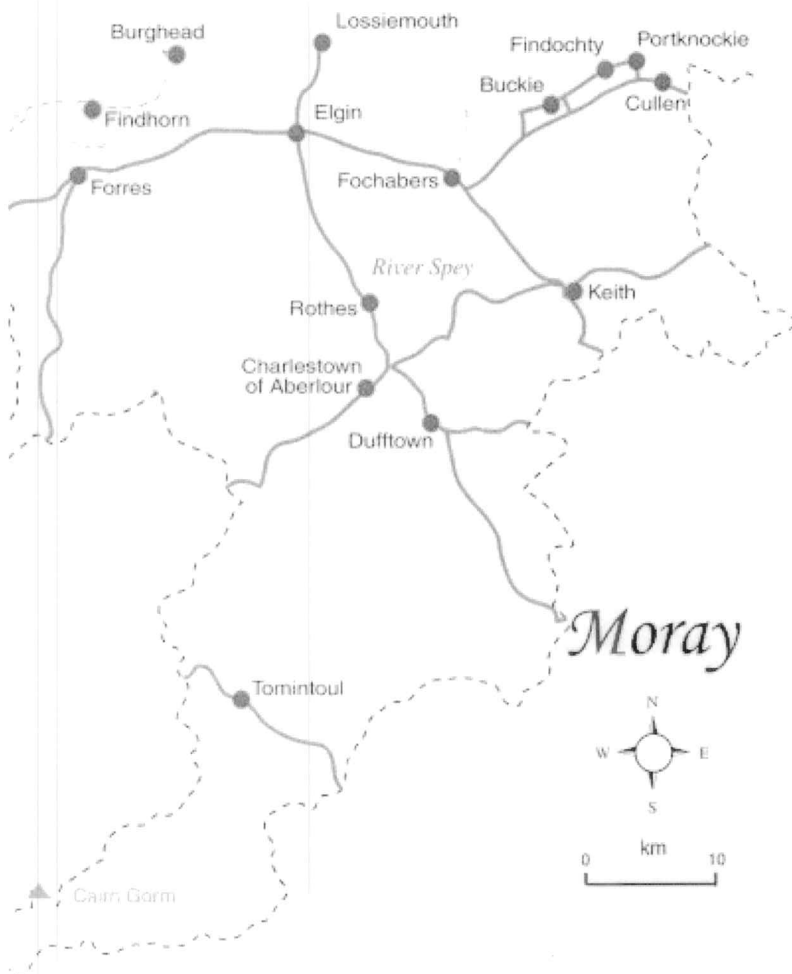


# MORAY 'SMARTER' THEME



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## STRATEGIC ASSESSMENT

2007/08

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## Introduction

This is the first strategic assessment undertaken on the 'Smarter' Community Planning Theme. 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 Partnership Theme Group to achieve not only its own outcomes and objectives but also those set by the Moray Council administration and the Scottish Government, ultimately ensuring children and young people have a right to grow up, develop to the best of their ability and have access to the services which will allow them to reach their full potential.

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 Partnership Theme Group and across partner agencies.

The assessment is divided into 4 main themes in order to ensure a wide range of issues are considered. The themes are:

- We are better educated, more skilled and more successful, renowned for our research and innovation
- Our young people are successful learners confident individuals, effective contributors and responsible citizens
- Our children have the best start in life and are ready to succeed
- We have improved the life chances for children, young people and families at risk

For each of the 4 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 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.

## A Profile of Moray

Moray is the 8<sup>th</sup> largest Council area in Scotland, covering an area of 2,238 square kilometres [1], from the Cairngorm Mountains in the south to the coast of the Moray Firth in the north. However, in terms of its population, it ranks 25<sup>th</sup> out of 32 with a population of just 86750 [1]. The area is mostly rural comprising 70% open countryside and a further 25% woodland [2]. The average population density is low at just 39 people 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 11<sup>th</sup> and 7<sup>th</sup> in Scotland respectively (the highest wage ranking 1<sup>st</sup>), 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 which 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 1/4 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 7,133 primary school pupils and 5,890 secondary school pupils, an overall drop of around 2% since 2003 (comprising a 4% drop in primary pupils & a 2% rise in secondary pupils). 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 [19].

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 [19].

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 [23].

Of 1,072 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 [17].

### **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 18<sup>th</sup> 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 12<sup>th</sup> was for the crime category crimes of dishonesty, while their lowest ranking was for non-sexual crimes of violence for which they ranked 27<sup>th</sup> 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 Themes - Smarter

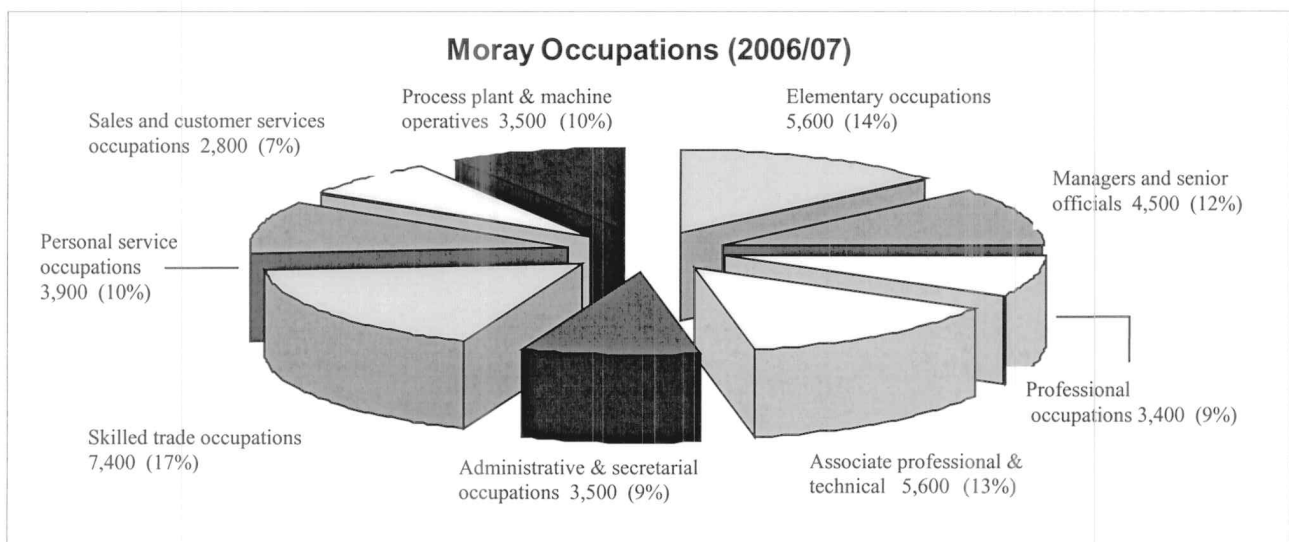
The Scottish Government's Smarter strategic objective is to expand opportunities for people in Scotland to succeed from nurture through to life long learning ensuring higher and more widely shared achievements.

This theme covers 4 main areas: We are better educated, more skilled and more successful, renowned for our research and innovation; Our young people are successful learners, confident individuals, effective contributors and responsible citizens; Our children have the best start in life and are ready to succeed; We have improved the life chances for children, young people and families at risk.

### 1) We are better educated, more skilled and more successful, renowned for our research and innovation

#### Employment Structure

In Moray, the employment structure is dominated by public sector jobs, with declining primary and manufacturing sectors. The single biggest occupational grouping is skilled trades due in large part to the RAF operations and manufacturing base in Moray accounting for 17% of the workforce. Moray is typically under represented in the higher end occupations of managers and senior officials, and professional occupations. In contrast, a higher proportion of the Moray workforce is employed in occupations at the other end of the scale – skilled trades, personal services, process plant and machine operatives, and elementary occupations – which account for 51% of the workforce compared with 39% nationally.



### Working Age Population – Qualifications

In 2007, Moray had a working age population of 52,600, 60.5% of its total population. This compares to a national figure of 62.7% being of working age. Moray has a higher proportion of those of a working age who are actually in employment with 80.5%, compared to a national average of 76% [6].

The office of National Statistics [6] data show that Moray's working age population is generally less qualified in all but one of the NVQ levels than national comparisons. In the lower level qualifications, NVQ1 and above (i.e. fewer than 5 Standard Grades or equivalent), Moray's working age population has been above the national average for 3 years. At the top level, in 2007, 27% of Moray's working age population were educated to HND, degree level or equivalent, compared to 33.2% nationally. Between 2005 and 2007, Moray's performance at levels NVQ1 (fewer than 5 standard grades or equivalent) and NVQ2 (more than 5 standard grades or equivalent) has improved at a higher rate than national improvement. However, although Moray has improved at levels NVQ3 (2 or more Highers or equivalent) and NVQ4 (HND, Degree or Higher Degree), it is at a rate significantly below national improvement therefore the gap has widened since 2005. School attainment data reinforces this position, where Moray's performance has been equal to or better than comparator authorities in Standard Grades, although generally attainment, in Moray, at Higher level has been below comparator and national results.

#### Working Age Population Qualifications

	NVQ1 and above		NVQ2 and above		NVQ3 and above	
	Moray	Scotland	Moray	Scotland	Moray	Scotland
2005	79.4%	78.6%	66.8%	67.9%	44.9%	50.3%
2006	79.5%	79.3%	67.7%	68.9%	45.3%	51.3%
2007	81.3%	79.2%	68.5%	68.9%	45.7%	51.7%

	NVQ4 and above		Other Qualifications		No Qualifications	
	Moray	Scotland	Moray	Scotland	Moray	Scotland
2005	25.9%	30.6%	8%	6.7%	12.5%	14.7%
2006	27.5%	32.1%	6%	6.9%	14.6%	13.7%
2007	27.0%	33.2%	6.3%	7.3%	12.4%	13.5%

### Job Related Training

For those in employment, data from Scottish Neighbourhood Statistics [10] suggests that, in Moray, the percentage of all employees who received job related training in the 3 months prior to interview fell from 34% in 2004 to 26% in 2006. During this period the Scottish rate also decreased but to a lesser extent from 31% in 2004 to 30% in 2006.

Highlands and Islands Enterprise (HIE) Moray, Business Research report, published in July 2007 [18] concluded that most organisations were undertaking some form of formal, as distinct from on-the job training. In most

cases this was driven by regulation, achieving industry or customer standards, or related to operating machinery. The level of awareness expressed by the majority of organisations had increased in relation to the benefits of training and that most employment was semi-skilled or skilled and there were few unskilled jobs reported.

During HIE Moray's research interviews, they were keen to explore beyond training and training courses to cover more strategic issues such as people development, and increasing the knowledge and innovative capacity of the organisation. For most organisations these were esoteric concepts that were completely irrelevant to them.

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

	% of all no job related training		% all job related training	
	Moray	Scotland	Moray	Scotland
2004	65	69	34	31
2005	69	70	31	30
2006	74	70	26	30

**Adult Literacy, 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.

The Adult Literacy and Numeracy End of Year Report 2006/07 [15] showed that demand of adult literacy and numeracy increased by 39% to 397 people in need that 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. Although the numbers asking for support increased over the past 3 years, it remains well below the estimated need.

Essential Skills have so far managed to meet demand for Adult Literacy and Numeracy but some areas, notably Elgin and Buckie, are working at full capacity.

The Workers Education Association provide educational opportunities for literacy learners in the workplace. A large part of their job is raising awareness and trying to change the culture in traditional industries to promote personal development for all staff. This is challenging in a climate of small and medium sized enterprises. They presently do not have a waiting list.

Moray College has reviewed the way it supports students with literacy problems and has implemented a new strategy. This will make inroads into meeting both demand and need. This strategy will move away from a “deficit” model of literacies to one where literacy support is an integrated aspect at all levels of curriculum provision. This will help the college to identify students who need additional help to make the most of their educational programmes.

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

The percentage of the population making use of Learning Centres and Learning Access Points continues to rise in Moray [16], with 16.5% making use of these facilities in 2006/07, above the national level of 10.7% and comparator average level of 10.9%.

### **School Leaver Destinations**

Scottish Government publish statistics on school leaver destinations [17] providing further evidence that a high proportion of school leavers in Moray, 35% in 2006/07 compared with 28% nationally and 31% in comparator authorities go on to employment, suggesting a link to Morays’ predominately low skilled workforce and limited managerial employment opportunities, potentially reducing the likelihood of children returning to the area following full time study.

The proportion attending full-time higher education has decreased by 2% to 25% in 2006/07 compared with 30% nationally and 29% in comparator authorities. This decrease may represent some pupils’ choice for a more vocational based course as evidenced by the 1% increase in the number of leavers entering full time further education in 2006/07.

	Full time higher education			Full time further education		
	2004/05	2005/06	2006/07	2004/05	2005/06	2006/07
Moray	25%	27%	25%	25%	23%	24%
Comparators	31%	31%	29%	23%	25%	24%
Scotland	31%	30%	30%	21%	23%	23%

	Training			Employment		
	2004/05	2005/06	2006/07	2004/05	2005/06	2006/07
Moray	1%	2%	1%	33%	33%	35%
Comparators	3%	3%	4%	29%	29%	31%
Scotland	5%	5%	5%	27%	26%	28%

	*Other known destinations			Destination unknown		
	2004/05	2005/06	2006/07	2004/05	2005/06	2006/07
Moray	14%	12%	14%	2%	3%	1%
Comparators	11%	12%	11%	3%	3%	1%
Scotland	13%	13%	12%	3%	2%	1%

\* Other known destinations include – Unemployed and seeking employment or training / Unemployed and not seeking employment or training

### **Summary and emerging trends**

- Moray has a higher employment rate than national however has the lowest weekly wage average in Scotland
- Moray's working age population with lower level qualifications, of fewer than 5 standard grades, is above national levels between 2005 and 2007
- The number of working age population achieving lower level qualifications has increased at a higher rate than national
- Moray continues to lag behind the national figure for working age population holding/gaining qualifications above NVQ1 level
- The number of working age population in all higher level qualifications has improved at a slower rate than national
- The lack of a higher qualified working population in Moray is a strong link to the low skilled, low wage employment market in Moray
- There is an unmet demand for Adult Literacy and Numeracy support in Moray
- The percentage of the Moray population making use of Learning Centre and Learning Access point users continue to be above national and comparator levels
- The percentage of school leavers in Moray going on to full time higher education has been lower than comparator authority and national levels for the past 5 years
- In Moray, the majority of jobs are located in the service sector
- The percentage of employees who received job training in the 3 months prior to interview decreased at a higher rate than national decline
- The percentage of employees who have not received job related training is increasing at a higher rate than national improvements