

The Regional Skills Assessments (RSAs) are a single, agreed evidence base on which to base future investment in skills. The infographic below is designed to support the Moray Growth Deal Summary report, using Oxford Economics forecasts\* over the period 2018-2028 to show current and future economic contribution as well as current and future demand for skills.

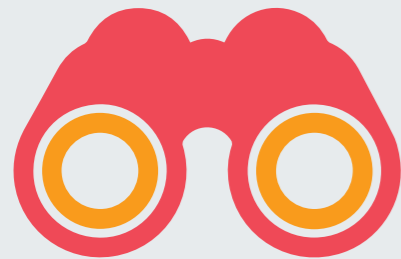
### The Economy



#### Gross Value Added (GVA)<sup>1</sup> in 2018

Total regional GVA is:  
**£2,076m**

**2%**  
of total Scottish output



#### Forecast<sup>2</sup> annual growth (2018-2028)<sup>3</sup>:

**Moray: 1.0%**  
Scotland: 1.6%  
United Kingdom: 1.9%



#### Productivity (GVA per job) in 2018

Regional productivity is:  
**£46,100**

Compared to national productivity of:  
**£47,300**



#### Forecast annual growth (2018-2028)

**Moray: 1.4%**  
Scotland: 1.3%  
United Kingdom: 1.4%

### Current Demand for Skills (2018)



#### Total Employment<sup>4</sup> in 2018

**45,000 jobs**



Total employment between 2008 and 2018:

**up by 2% or 900 jobs**

Compared to a national increase of 2%

### Sectoral Employment

#### Top 3 employing sectors in 2018:



Manufacturing  
(6,600 jobs)



Wholesale  
& retail  
(6,600 jobs)



Human health  
& social work  
(5,700 jobs)

### Employment by Occupation (people)

#### This is what the occupational structure<sup>5</sup> looks like in 2018:

**33%**  
Higher level  
occupations



**38%**  
Mid-level  
occupations



**30%**  
Lower level  
occupations



\* As with all forecasts, certain caveats need to be applied. They are based on what we know now and include past and present trends projected into the future. Their value is in identifying likely directions of travel rather than predicting exact figures. It is recommended therefore that users examine trends over time rather than focusing on changes in individual years. Finally, the more disaggregated they become, especially at smaller geographical units, the less reliable they are likely to be.

<sup>1</sup> GVA is the measure of the value of goods and services produced within the economy.  
<sup>2</sup> Forecasts by Oxford Economics (unless

otherwise stated).  
<sup>3</sup> Data for 2019 to 2028 used as 2018 is based on the change between 2017-18. Please see RSAs and Technical

Note for more details.  
<sup>4</sup> Measured by total number of jobs.  
<sup>5</sup> 'Higher level occupations' are defined as Managers, directors &

senior officials, Professional occupations, and Associate professional & technical occupations; 'Mid level occupations' defined

as Administrative & secretarial occupations, Skilled trades occupations, Caring, leisure and other service occupations; and 'Lower level

occupations' defined as Sales & customer service occupations, Process, plant & machine operatives, Elementary occupations.

The Regional Skills Assessments (RSAs) are a single, agreed evidence base on which to base future investment in skills. The infographic below is designed to support the Moray Growth Deal Summary report, using Oxford Economics forecasts\* over the period 2018-2028 to show current and future economic contribution as well as current and future demand for skills.

### Future Supply

#### Population 2016-2028<sup>6</sup>

Total population between 2016-2028:

up by 5% or 4,900 people

Forecast change:

Moray: 5%

Scotland: 4%

United Kingdom: 6%

The working age population (16-64) between 2016-2028:

0% or -100 people

Forecast change:

Moray: 0%

Scotland: -1%

United Kingdom: 8%

### Job Openings (2018-2028)

Between 2018-2028 there will be a:

Total requirement for 15,800 people

Expansion demand:<sup>7</sup>

Replacement demand

-1,500 people

17,300 people

This is what actual job openings within the total employment structure look like over the next 10 years:

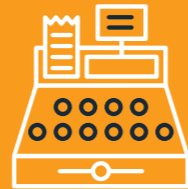
31%  
Higher level occupations



30%  
Mid-level occupations



39%  
Lower level occupations



### Future Demand for Skills (2018-2028)

#### Total Employment 2018-2028<sup>8</sup>

down by 4% or 1,600 jobs

Forecast average annual change:

Moray: -0.3%

Scotland: 0.3%

United Kingdom: 0.4%

Top 3 employing sectors in 2028 are forecast to be:



Wholesale & retail (6,400 jobs)



Manufacturing (5,800 jobs)



Human health & social work (5,500 jobs)

Between 2018-2028

The largest employment growth is forecast in:



Construction (9%)



Admin & support services (6%)



Information & communication (5%)

The largest employment decreases are forecast in:



Mining & quarrying (-26%)



Manufacturing (-13%)



Water supply; sewerage & waste (-9%)

<sup>6</sup> Source: National Records of Scotland.  
<sup>7</sup> i.e. the number of jobs across the region is forecast to decrease over the period due to contraction of the economy. Expansion demand is the measure of an increase/decrease in jobs, as a result of economic growth or contraction; replacement demand is the

number of job openings generated through labour market churn (i.e. those who retire, move away, or change jobs). N.B. Some figures may not sum due to rounding.

<sup>8</sup> Throughout this section, figures for 2018 - 2028 use 2018 to 2028 data as per Oxford Economics

calculations. Please see RSAs and Technical Note for more details.