

Regional Skills Assessments (RSAs) are a single, agreed evidence base created to inform future investment in skills. This infographic is for Moray and supplements the region's Growth Deal Summary report. It uses Oxford Economics forecasts* for the 2019-2029 period to show current and future economic contribution, as well as current and future demand for skills.

The Economy



Gross Value Added (GVA)¹ in 2019

Total **Growth Deal** GVA is: **£1,936m** of total **Scottish** output **1%**

Forecast² annual growth (2019-2029):

Moray: 1.2%
Scotland: 1.7%
United Kingdom: 2.0%



Productivity (GVA per job) in 2019

Growth Deal productivity is: **£46,000** **Scottish** productivity is: **£50,400**

Forecast³ annual growth (2019-2029)

Moray: 1.4%
Scotland: 1.4%
United Kingdom: 1.5%

Current Demand for Skills



Total Employment in 2019³

42,100 jobs

From 2009-2019, Total Employment:

down by 1% or 500
Compared to a **Scottish increase of 1%**



Current Demand for Skills

Sectoral Employment

Top 3 employing sectors in 2019:



Manufacturing
(6,200 jobs)



Wholesale & retail
(5,900 jobs)



Human health & social work
(5,800 jobs)

Employment by Occupation (people)

Occupational structure 2019⁴:

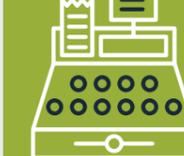
33%
Higher level occupations



37%
Mid-level occupations



29%
Lower level occupations



Skills Shortages and Gaps

The percentage of skills shortage vacancies and skills gaps in the Highlands and Islands region are⁵:



Skills Shortage Vacancies⁶

Highlands and Islands: 25%
-1 ppt decrease from 2015

Compared to **Scotland: 24%**

Skills Gaps⁷

Highlands and Islands: 6.1%
1.0 ppt decrease from 2015

Compared to **Scotland: 5%**

* 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.

¹ GVA is the measure of the value of goods and services produced within the economy.
² Forecasts by Oxford Economics (unless otherwise stated).
³ Measured by total number

of jobs.
⁴ '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. Data shown is workplace based.
⁵ Source: Employer Skills Survey, 2017
⁶ Base: All establishments with

vacancies (only 2017 shown). Skill-shortage vacancies as a proportion of all vacancies. This may be due to a lack of skills, qualifications or experience amongst applicants.

⁷ Base: All establishments (only 2017 shown). Skills gaps: the proportion of the workforce lacking full proficiency.

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Future Supply

Population 2016-2041⁸

Total population:
up by 8% or 7,800 people

Working age population (16-64):
down by 3% or 2,000 people

Forecast change:
Moray: 8%
Scotland: 5%
United Kingdom: 11%

Forecast change:
Moray: -3%
Scotland: -4%
United Kingdom: 8%

Future Job Openings

From 2019 to 2029 there will be a requirement for:

-900 people
Expansion Demand

17,600 people
Replacement Demand

16,800 people
to fill Job Openings⁹

Occupational structure 2029:

31%
Higher level
occupations



31%
Mid-level
occupations



38%
Lower level
occupations



Future Demand for Skills

From 2019-2029, Total Employment:

down by 2% or 800 jobs



Forecast average annual change:
Moray: -0.2%
Scotland: 0.3%
United Kingdom: 0.5%

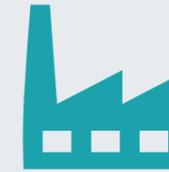
Top 3 employing sectors in 2029 are forecast to be:



Wholesale
& retail
(5,900 jobs)



Human health
& social work
(5,900 jobs)



Manufacturing
(5,400 jobs)

From 2019 to 2029
The largest employment growth is forecast in:



Admin
& support
services
(10%)



Construction
(7%)



Professional,
scientific &
technical
(7%)

The largest employment decreases are forecast in:



Mining &
quarrying
(-28%)



Manufacturing
(-13%)



Electricity, gas,
steam and air
conditioning
(-10%)

⁸ Source: National Records of Scotland.

⁹ 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. Figures are rounded to the nearest 100 and as a result totals may not equal the sum of the constituent parts.