

## **Summary of Speyside ASG/LMG**

The Speyside ASG includes the following towns/villages: Aberlour, Craigellachie, Dufftown, Glenlivet and Inveravon, Knockando, Rothes, and Tomintoul. Population levels are low throughout the Speyside area, ranging from 536 in Craigellachie to 1667 in Dufftown.

### **Major issues**

The main issues for the Speyside area are themes which cut across the ASG. In line with the national and Moray trend, Speyside has an aging population. It has a higher than average proportion of people aged 45 and above, and Aberlour has the highest percentage of individuals aged 75+. Given the geography of the area, access to older people's services is a relevant issue for Speyside. Travel time to GP services takes twice the Moray average 'drive time' in three of the ASG's seven areas.

The implications of the aging population within the Speyside ASG are two-fold: provision of and access to older people's services; and, the implications of a smaller working age population on the area's economy – which is of particular significance given the importance of its manufacturing industry to both Moray and Scotland's wider economies.

The economy is the second theme of relevance in this ASG. The local industry is an asset for the area and provides employment opportunities for its residents. However, there are above average rates of employment in lower paid occupations, for example Dufftown has the highest percentage of residents employed in elementary occupations. In addition, the rurality of Speyside results in greater need for private transport and multiple car ownership is very common in this area. Knockando has the highest percentage of households with three or more cars/vans. Lower incomes and added transport expenditure have implications for household cash flow.

Educational attainment and post-school destinations are also linked to the economy theme. Entry to employment after school is above both the Moray and Scottish averages in six of the ASG's seven areas. Recent levels of attainment are higher than the Moray average across the ASG which suggests that there is potential for young people to continue their education. However, encouragement of a greater uptake of Higher Education may further impact the working age population with consequences for local industry.

### **Minor issues**

There are higher than average percentages of council rented accommodation in the ASG's three main towns. Levels of 'other social rented' accommodation are higher in more rural areas as is rent free accommodation. The Glenlivet and Inveravon area has the highest percentage of rent free accommodation in Moray. Also of note for the Speyside ASG is the variation in health in relation to obesity. The Glenlivet and Inveravon area has the highest percentage in Moray and Rothes has the lowest. Finally, the latest SIMD data ranks the majority of Speyside as deprived in relation to access to services.

### **Population**

Speyside's three main towns, Aberlour, Dufftown and Rothes have similar population characteristics, notably in relation to the proportion of older residents. As well as higher percentages of households where residents are aged 65+, these towns also have more people aged 75 and over (Aberlour has the highest percentage in Moray), and also relatively more people who have survived the loss of a partner. An aging population, particularly where living alone, may have consequences for the availability of unpaid care and the need for paid care services, both of which would have an impact upon public expenditure. However, a higher concentration of older people living in the town suggests closer proximity and therefore better access to services.

In contrast, some of Speyside's more rural areas have fewer residents that are aged 75+ than the Moray average. This may indicate a lack of residential care opportunities in these areas or perhaps a decision to move to less rural areas to more easily access services. There is a higher percentage of residents aged 45+ in this ASG when compared with both Moray and Scotland. It is therefore likely that demand for older people's services will increase over time. The rurality of particular area may influence decisions as to where these services are located and/or how they are accessed.

Looking at the population in another way, with the exception of Glenlivet and Inveravon, there are fewer people aged 16 – 59 across the ASG than is the case in Moray. Speyside is home to a number of Moray's traditional industries, including distilleries, cooperages and a major food production factory. A smaller working age population may have implications for the longer term sustainability of the area's economy.

### **Identity**

Roths stands out as being a traditional Scottish town. It has more residents born in Scotland and who describe themselves as 'White – Scottish' than the Moray average. While Speyside as a whole has more people who describe themselves as belonging to the Church of Scotland Roths, followed closely by Knockando, has the highest levels in Moray (almost half of the population).

There is an element of diversity in the Speyside area however and some of the smaller areas have a higher percentage of 'White – Other British' residents: most notably Glenlivet and Inveravon, Tomintoul, and Knockando. Of the residents born outside the UK and who live in these areas relatively high numbers have lived in the UK for more than 10 years which would suggest a settled community.

It is interesting to note that while Aberlour has a significantly older population it is also the area in Moray with the highest percentages of people born outside the UK who have lived in the UK for relatively short periods of time (up to 5 years). This suggests a level of diversity within the community. While the type of industry in Speyside as a whole may attract workers from elsewhere, Aberlour stands out in this respect amongst its ASG neighbours.

### **Housing**

Levels of home ownership across the area are largely in line with Moray. Exceptions to this are Aberlour and Knockando where there are significantly higher percentages of home ownership, and Tomintoul which has much fewer home owners. Instead, Tomintoul has a higher incidence of social/private landlord than is the 'norm' for Moray. In addition Tomintoul, is one of several areas with significantly higher percentages of people living rent free than anywhere else in Moray, suggesting a link between employment in distilleries and tied housing. Although levels of rent free accommodation fell between the 2001 and 2011 Censuses, these figures demonstrate the continued impact of this industry on the local population.

The town of Roths has the highest percentage of terraced houses in Moray and the level of council rented accommodation is significantly higher here than is the case anywhere else in Speyside, and is also above the Moray average.

The rural nature of Speyside results in a greater need for private transport. Knockando has more households with 3 or more cars/vans than anywhere else in Moray and a number of areas elsewhere in Speyside have significantly more households with 2 or more cars/vans than the Moray average.

Speyside's more rural areas therefore have the added expenditure of multiple car/van ownership. Employment in the area tends to be in low skilled jobs which would suggest lower levels of pay. The

added expenditure of vehicle ownership, particularly multiple vehicles, therefore has a substantial impact upon household cash flow. Those living rurally who cannot afford private transport will rely heavily on public transport to access services. This has implications for the location of public services and also for the availability of public transport to those services.

### **Economy and labour**

In the main, the rate of full time employment across the ASG is similar to that of Moray. This is with the exception of Glenlivet and Inveravon, and Tomintoul. These areas have significantly higher rates of self-employment than is the case for Moray, more than twice as much.

As mentioned earlier, Speyside is home to several traditional food and drink production industries. It is therefore not surprising that manufacturing is the main employment sector throughout Speyside, significantly above both the Moray and Scotland averages. Aberlour has the highest rate in Moray - almost three times that of the Moray average. In 2013 Moray was responsible for 5.3% of GVA (Gross Value Added) for all of Scotland's manufacturing activities<sup>1</sup>. The importance of this industry base in Speyside therefore cannot be underestimated.

Employment in public administration and defence is relatively low across the area suggesting that distance from the more urban areas of Moray where these jobs are primarily located is a prohibitive factor. Similarly, the wholesale/retail trade makes up a smaller part of Speyside's economy than is the case elsewhere in Moray which might again be due to the more rural nature of this ASG.

In line with the predominance of manufacturing, skilled trades and elementary occupations are the two main job types across this ASG. In two of Speyside's main towns, Dufftown and Rothes, more people are employed in elementary occupations than any other job type. In general there appear to be fewer opportunities for jobs at a professional/associate professional or management level.

The areas with the highest rates of employment in skilled trade occupations match those with the highest rates of self-employment – Glenlivet and Inveravon, and Tomintoul, with Knockando a close third. Further, these areas also have the highest percentages of people in Speyside who work from home. Almost a third of the workforce in the Glenlivet and Inveravon area work from home: the highest percentage in Moray. There may be a correlation between this and the fact that these same areas each have significantly higher percentages of individuals working in the agriculture, forestry and fishing industry than is usual for Moray, this being a traditional farming area.

As might be anticipated, there is a higher percentage of travel to work by car by those living in Speyside's more rural areas. Living in a town setting may make walking to work a feasible option, particularly given the close proximity of local industry. Indeed, Aberlour has the highest percentage of people in Moray travelling to work on foot. In some areas of Speyside there is evidence of a greater use of bus as a means of travel. This not only suggests that people may work slightly further afield, it also demonstrates the availability of public transport.

While the existence of a strong industry base helps to ensure a good rate of employment, people tend to be employed in relatively lower skilled jobs which would suggest lower incomes. As discussed earlier, lower income together with the higher costs associated with living in rural locations means a reduced cash flow which may increase the likelihood of in-work poverty.

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<sup>1</sup> City Regional Deal, Moray – Baseline Economic Assessment (2016)  
Summary of Speyside ASG/LMG  
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## **Education**

The overall adult population (aged 16-64) of the Speyside ASG hold low levels of qualification and there are areas where significantly higher percentages of adults have no qualifications than is average for Moray. Figures available for the area's three main towns (Aberlour, Dufftown and Rothes) show that there are significantly fewer households where an adult is qualified up to the level of higher exams or where residents aged 16-18 are studying full time. However, it is notable that the four more rural parts of the ASG have higher than average percentages of adults educated to degree level and above.

More recent levels of attainment are higher than the Moray average across the Speyside area at both S4 and S5 level although results vary in relation to attainment of higher level exam awards. Craigellachie and Aberlour fare noticeably better in gaining three and five higher level exam awards than the rest of the ASG and also in comparison with the Moray average. Attainment levels in Craigellachie are significantly higher than the rest of Speyside, Moray and also Scotland. As might be anticipated, young people from Craigellachie are more likely to enter a Higher Education destination after school than any other option.

With the exception of Craigellachie, the most common destination for Speyside school leavers is employment with higher percentages entering employment than both the Moray and Scottish averages. The availability of jobs in the manufacturing sector provides employment opportunities without the need for high level qualifications. The low level of attainment in the local adult population might infer that work rather than further or higher education has been a traditional destination for the area's young people. However, the ASG's recent S4 and S5 tariff scores suggest a potential to attain more exam awards and therefore, in the longer term, to challenge the traditional expectations of and for young people.

Although Speyside has a relatively high rate of car/van ownership, travel to school by car is below the Moray average across the ASG. Instead travel by bus is the main mode of transport for students in all but one area (Aberlour). This illustrates a heavy reliance on the availability of public transport to enable students reach their place of study. With the area's secondary school being located in Aberlour it is perhaps not surprising that the vast majority of students here travel on foot. In fact, Aberlour has the highest percentage of students in Moray travelling on foot.

## **Health and social care**

The top three health conditions in Speyside are smoking, hypertension and obesity. Five of the ASG's seven areas have higher percentages of residents that suffer from hypertension than the Moray average. The notable exception to this is the Glenlivet and Inveravon area. This area has the lowest percentage in Moray for both hypertension and for conditions associated for smoking.

In relation to obesity the Glenlivet and Inveravon area has the highest percentage in Moray and Rothes has the lowest. As discussed earlier, almost a third of Glenlivet and Inveravon's workforce work from home. This is also an area where multiple car/van ownership is high: over half of the households have 2 or more cars/vans. In contrast, car ownership is less common in Rothes and the majority of households have just one vehicle. This may suggest that the ability to access services on foot may have a positive impact on people's health. In contrast, although working from home may be seen as a favourable option for those living rurally this, together with limited ability to access services on foot, may have negative health consequences.

Aberlour is home to one of Moray's 15 registered care homes and one of the five community hospitals. Moray has one day centre dedicated to the provision of support for older people and this is located in Rothes. Therefore while Aberlour and Rothes have the lowest percentages of

individuals providing unpaid care in Moray, these towns have do have access to paid care. As rates of emergency admissions to hospital (for all ages and for those aged 65+) are lower than the Moray average in these towns it might be inferred that levels of care provided here adequately support the older population.

However in contrast, Dufftown, which has similar levels of unpaid care and is also home to a community hospital, has a higher rate of emergency admissions. This demonstrates that older people's needs are complex and that there is not a 'one size fits all' solution. As discussed earlier, Speyside has a higher percentage of individuals aged 45+ than the Moray average. This highlights the need for long term planning for older people's services in this area as a preventative measure.

### **Anti-social behaviour / crime**

While levels of anti-social behaviour are generally low in comparison with Moray, Dufftown has a higher percentage of both noise-related and neighbour dispute complaints, and Aberlour has the highest percentage of incidents of dog fouling in Moray. However, crime rates are significantly below the Moray average.

### **Access to services**

The rural nature of Speyside has implications for residents' access to services: the latest SIMD data ranked the majority of Speyside as deprived in relation to this.

As discussed above there is a strong reliance upon car/van ownership throughout the ASG. A high percentage of people drive to work and accessing local services takes significantly longer than the Moray average. For example, as a minimum, drive time to shopping facilities takes at least twice as long and in the case of one area the journey time is eight times as long as the 'norm' for Moray.

Although drive time to local schools is significantly longer than the Moray average the impact of this on families is reduced through the provision of bus transport.

Accessing local GP services also takes significantly longer in Speyside's more rural areas than the Moray average: up to three times as long in one area by public transport, and twice as long by car in three of Speyside's seven areas. By linking this to the ASG's aging population and the potential increase in demand for health services, it can be seen that travel time for accessing services is an important consideration for the long term planning of not only older people's services but also of public transport services.