



Comhairle nan Eilean Siar
Development Department
Socio Economic Update No 34
June 2017



National Records of Scotland published mid 2016 population estimates on 27 April 2017. Mid year estimates are produced annually and relate to the 30th June of the year covered. Births and deaths are estimated using data from the civil registration system and are virtually complete. Estimates of migration are produced using best sources available including GP registrations and survey information.

The current population estimate for the Outer Hebrides is 26,900 as at 30 June 2016; this represents a decrease in the overall population of 170 persons (-0.6%) from mid 2015 to mid 2016.

The Outer Hebrides is estimated to have had the highest population decline in Scotland.

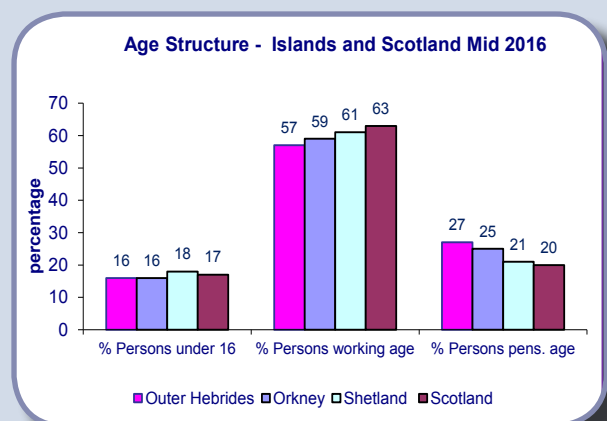
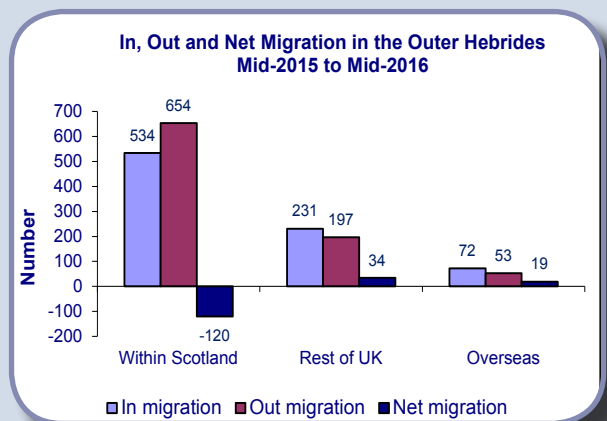
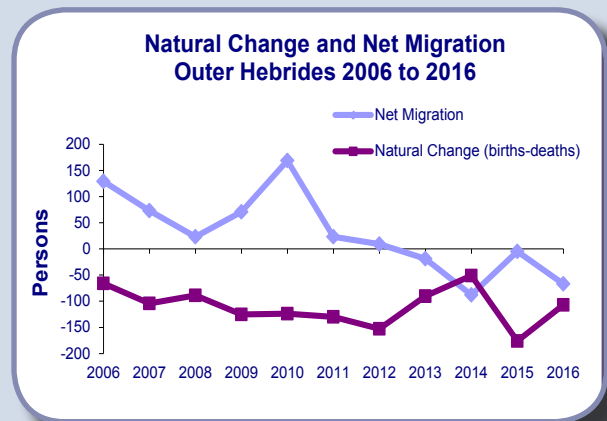
The population is estimated to have decreased over the year primarily because of negative natural change, which was -107, due to 336 deaths and 229 births. This, along with the estimated net civilian migration which was -67, led to the decrease as illustrated in the adjacent graph.

Over the decade from 2006 to 2016 there was a population decrease of 160 persons (-0.6%), in comparison to a 5.3% increase nationally. Orkney had a 7.4% increase and Shetland a 4.5% increase over the same period.

Negative net migration is continuing and has increased from -5 last year to -67. Net migration is positive within the rest of the UK and overseas, but negative within Scotland (as illustrated).

The Outer Hebrides, along with Argyll & Bute and Dumfries & Galloway, had the highest percentage of those aged 65 and over at 25%, compared to the Scottish average of 18%. The adjacent graph illustrates the skewed age profile.

The population pyramid for Scotland for 2016 is showing a change in pattern, There were 17% more 19 to 28 year olds in 2016 than there were 9 to 18 year olds in 2006. Such a change can only be generated by new population being added through migration.



National Records of Scotland (NRS) have also produced demographic and census profiles of European Economic Area (EEA) born residents in Scotland. The analysis focuses on residents based on their country of birth.

On 31 January NRS released the 2014 based Household Projections. Household projections are produced every 2 years. Figures include breakdowns by type of household and age of head of household.

According to the 2011 Census, 1.2% (330 people) in the Outer Hebrides were born in the EEA. The corresponding proportion for Scotland was 3%.

The age profile of EEA born residents in the Outer Hebrides is younger than that of the whole of the Outer Hebrides with 78% of EEA-born residents aged 16-64 in comparison to 62% of the whole of the Outer Hebrides.

Over the next 25 years the working age in the Outer Hebrides is projected to decline by 27% by the year 2039. The biggest decline is expected in those aged 16 to 24 years with a decrease of 36%.

Nationalities of National Insurance Number (NINo) allocations to overseas nationals in 2015 showed that the top 5 nationalities in the Outer Hebrides were : Romania, Spain, Lithuania, Poland and Germany. In Scotland the top 5 nationalities were: Poland, Romania, Spain, Italy and Bulgaria.

A higher proportion of the EEA residents in the Outer Hebrides aged 16 and over were in employment (70%) in comparison to 58% in the whole of the Outer Hebrides.

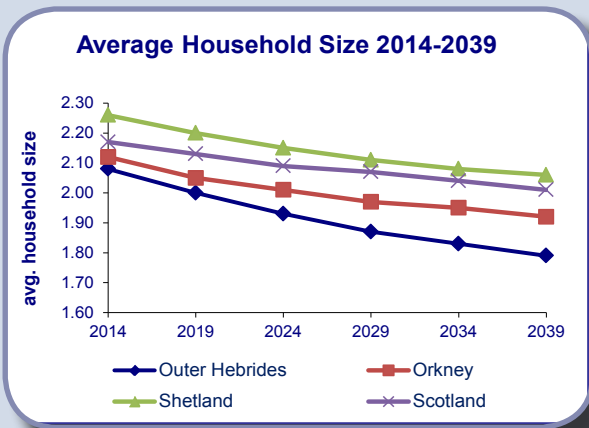
At the time of the 2011 Census a total of 210 EEA-born people aged 16-74 were working in the Outer Hebrides. The industrial sector with the highest percentage of its workforce EEA-born was manufacturing with 41 people working in the industry, making up 6% of the workforce.

There were 60 EEA-born residents working in public administration, education and health and 40 people working in distribution, hotels and restaurants.

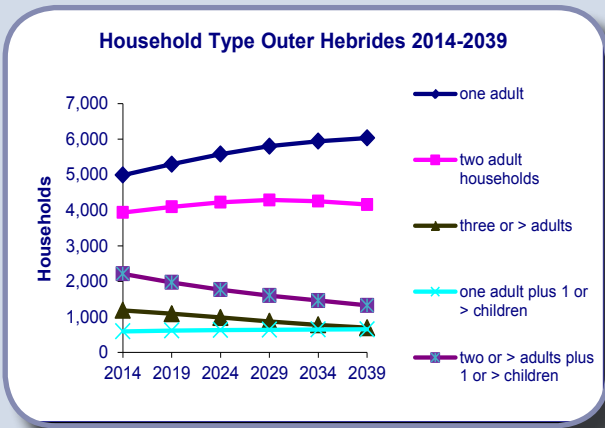
The proportion of EEA-born residents aged 16-74 with a degree level qualification was 48%, higher than for people in the Outer Hebrides at 27%.

The current household projections identify a 0.4% decrease (48 households) in the number of households in the Outer Hebrides from 12,920 in 2014 to 12,872 in 2039. The number of households keep increasing up to the year 2029 to 13,207 households and then decreases to 12,872 in 2039.

Over the same period the population is projected to decrease by -14%. The average household size is projected to decrease from 2.08 in 2014 to 1.79 in 2039 (the smallest in Scotland) as illustrated below.



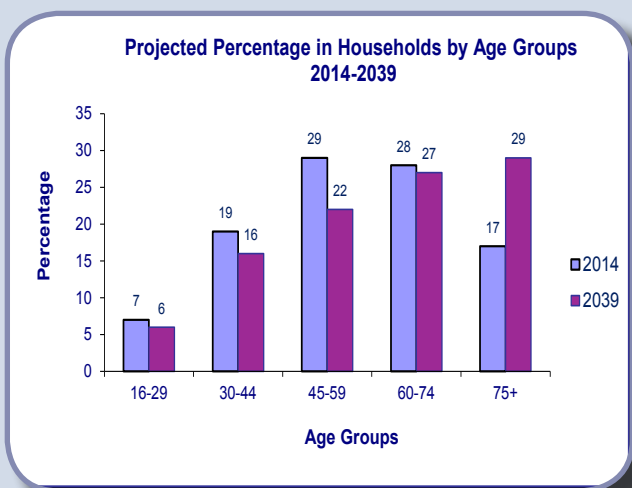
Changes in household type between 2014 and 2039 are projected as follows: 21% increase in '1 adult'; 6% increase in '2 adult'; 41% decrease in '3 or more adults & no children'; 10% increase in '1 adult + 1 or more children' and 40% decrease in '2 or more adults + 1 or more children'



The Outer Hebrides is projected to have the smallest proportion of households with children in 2039 at 15%.

The Outer Hebrides is projected to have the smallest proportion of households containing '2 or more adults + 1 or more children' at 10%, along with Glasgow City.

In terms of headship rates, the following changes are projected: 12% decrease in households headed by person aged 16-29; 16% decrease in those aged 30-44; 32% decrease in those aged 45-59; 5% decrease in those aged 60-74, and; a 67% increase in those aged 75 and over.



Due to an ageing population the Outer Hebrides is projected to have the highest proportion of houses headed by someone aged 60 or over in 2039 at 56%, along with Argyll & Bute. The chart above illustrates headship rates for 2014 and 2039.

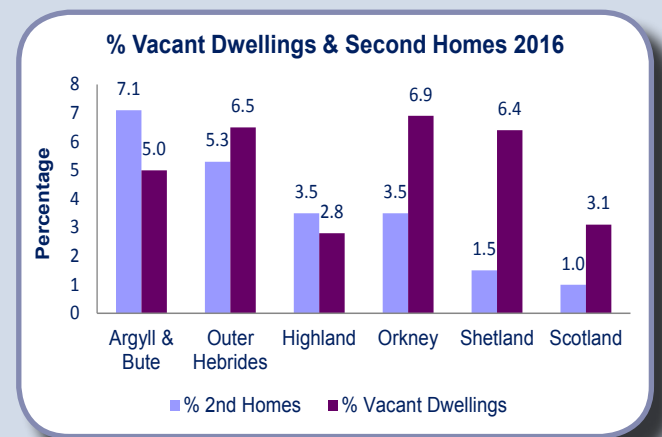
On 14 June NRS released the 2016 Household Estimates. Household estimates are produced every year. They are mainly used to inform local authorities in their decision-making about housing need and the provision of services. They are based on Council Tax data. The Scottish government introduced new regulations in 2013 which allowed Councils to increase charges on certain long-term empty properties.

The 2016 Household Estimates identify a decrease of 17 households (-0.1%) from 2015 to 2016, while the Scottish average was a 0.7% increase. The number of households has increased in every local authority area except the Outer Hebrides.

However, in the long term the 2016 Household Estimates identified an increase of 1,172 households (10%) from 2006 to 2016, the 6th highest percentage change in Scotland, and greater than the national trend (6.8%).

The number of dwellings has increased by 22 (0.2%) over the year 2015 to 2016 and has increased by 840 (6.1%) from 2006 to 2016.

Of all 32 Scottish Local Authorities areas, the Outer Hebrides is estimated to have: the second highest % of vacant dwellings at 6.5% (Orkney have the highest at 6.9%, nat avg 3.1%); the second highest % of second homes at 5.3%, Argyll & Bute have the highest at 7.1% (nat avg 1.0%).



The average household size in the Outer Hebrides has decreased from 2.27 in 2006 to 2.05 in 2016, the largest decrease (-9.6%) in Scotland.

Key Findings for Scotland

There has been an increase of around 257,300 households (12%) over the last 15 years.

The rate of growth was increasing before the economic downturn, but since then the annual increase has fallen, reaching its lowest point in 2012. In 2016 there were 2.45 million households in Scotland, an increase of around 157,000 (6.8%)

over the last 10 years. Over the last year the increase was 17,913 households (0.7%).

Average household size has fallen from 2.20 people per household in 2006 to 2.16 in 2016.

Births and Deaths

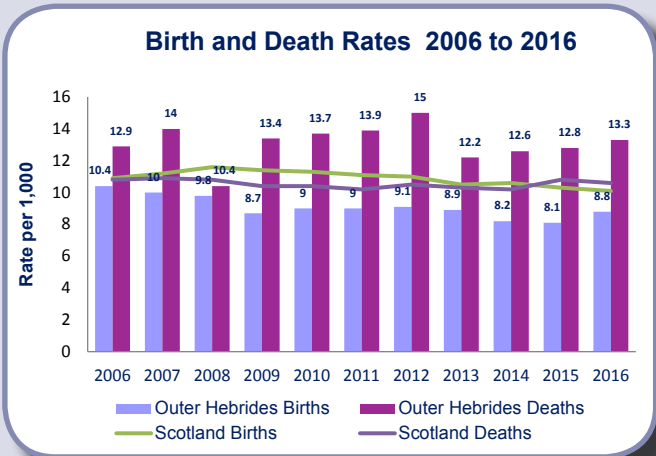
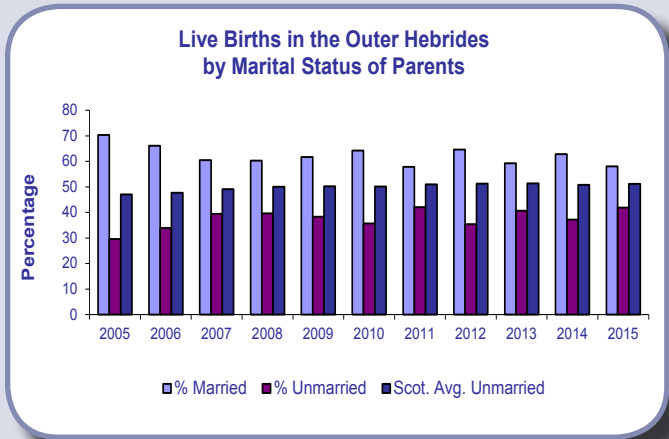
Birth rates in the Outer Hebrides continue to be much lower than the Scottish average. In addition, death rates in the Outer Hebrides are much higher than the Scottish average.

Over the period 2006 to 2016 the highest birth rate in the Outer Hebrides was 10.4 (per 1,000 persons), while in Scotland it was 11.6. The lowest birth rate was 8.1 in the Outer Hebrides and was 10.1 in Scotland. The highest death rate in the Outer Hebrides was 15, while in Scotland it was 10.9. The lowest death rate was 10.4 in the Outer Hebrides and 10.2 in Scotland, as illustrated in the chart below.

It is mainly due to the continual negative natural change that the population of the Outer Hebrides is decreasing. In order to counteract this, net migration needs to be positive. However, over the last few years net migration has also been estimated to be negative, leading to a further decrease in population.

decreased from 70.4% in 2005 (Scot.avg. 52.9%) to 58.1% in 2015 (Scot.avg. 48.8%).

The number of births was highest in 2006 with a total of 274 births, of which there were 138 females and 136 males. It was lowest in 2015 with a total of 222 births; 105 females and 117 males.



Births by Marital Status

The vital events section on the [National Records of Scotland](#) web site provides a wide range of statistical information about events, including births, deaths, marriages and civil partnerships.

The following chart shows that the percentage of births to married parents in the Outer Hebrides has

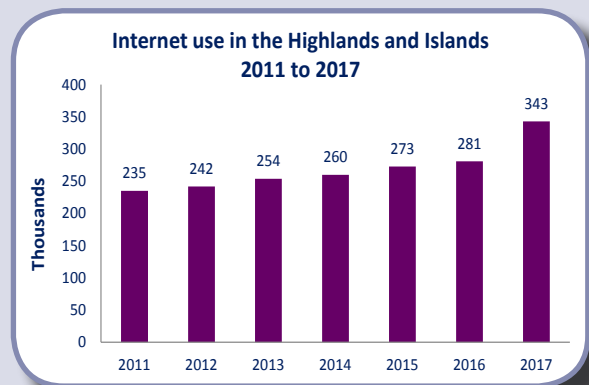
Internet Users in the UK 2017

The [Office for National Statistics](#) has recently released information on internet users, aged 16 and over, in 2017. Internet use in the Highlands and Islands has increased significantly by 22% from 2016 to 2017. This is a much bigger increase in users than in previous years, as illustrated in the chart below. There has been an increase of 46% in internet use over the years 2011 to 2017.



London remains the region with the highest proportion of recent internet users at 93%. However, in Scotland 87% were recent users.

Northern Ireland had the lowest proportion at 84%.



Labour Market

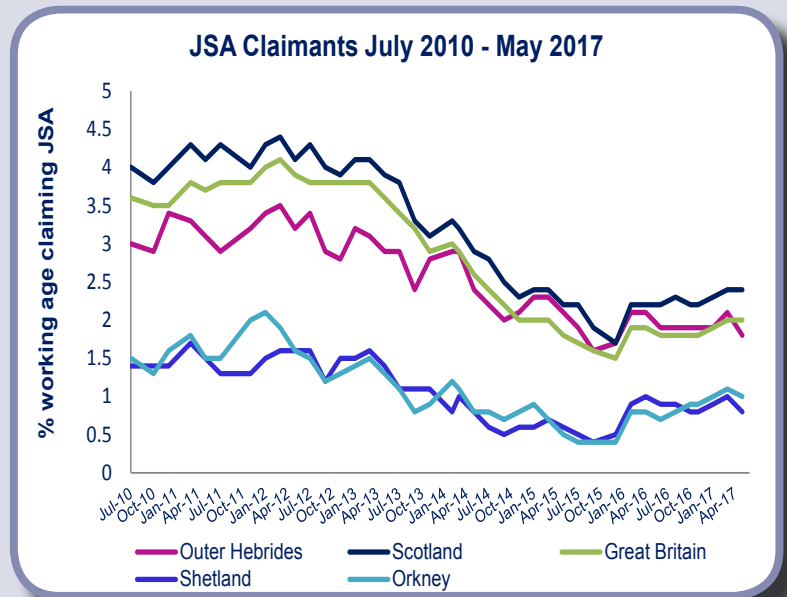
The labour market profile from NOMIS shows that employment rates are remaining constant. The employment rate in the Outer Hebrides from January 2016 to December 2016 was 81.2% while Scotland was 76.8% and Great Britain was 77.8%. The self employment rate in the islands has increased to 11.1% in the Outer Hebrides and is 8.7% in Scotland and 10.6% in Great Britain. The Outer Hebrides has the 7th highest rate in Scotland, Orkney has the highest at 12.9%. Although the JSA rate (shown in the table below) remains lower than that of Scotland it varies greatly between men and women. The rate for men is 3.1% while the rate for women is 0.9%.

The JSA rates by age group are 2.6% for those aged 18 to 24 (Scot.avg. 3.6%), 1.8% for those aged 25 to 49 (Scot.avg. 2.5%) and 2.3% for those aged 50+ (Scot.avg. 1.9%).

The latest release from [NOMIS](#) (Office for National Statistics) gives the following Job Seeker Allowance (JSA) claimant rates for May 2017:

Outer Hebrides	1.8%
Scotland	2.4%
Great Britain	2.0%
Shetland Island	0.8%
Orkney Islands	1.0%

The JSA rates remain at almost the same rate, with a slight rise in March. Orkney and Shetland continue to have the lowest rates in Scotland.



Regional Employment Patterns

A release from the Annual Population Survey (APS) 2016 shows the [Regional Employment Patterns](#) in Scotland. The APS is the primary source of information on local labour markets providing estimates on employment, unemployment and economic inactivity. Some key findings for the Outer Hebrides are:

- The employment rate in the Outer Hebrides was 77.8% (Scot.avg. 73.1%), an increase of 0.5% from the previous year.
- The Outer Hebrides has the highest percentage in Scotland of workers in the public sector at 38.5%, while the Scottish average is 26.6%.
- The Outer Hebrides had one of the highest employment rates for older workers (50+) – Shetland Islands (50.1%), Orkney Islands (49.5%), Aberdeenshire (47.0%), Highland and Outer Hebrides (both 46.7%).
- The Outer Hebrides had one of the highest underemployment rates at 11.7% along with Shetland Islands (21.3%) and Highland and North Ayrshire (both 11.3%), while the lowest rates were seen in North Lanarkshire (5.1%), East Dunbartonshire (5.6%) and Clackmannanshire (5.8%).
- The employment rate for those with SVQ level 4+ qualifications varies by local authority. The Outer Hebrides is one of the Local Authorities with the highest employment rates for those with SVQ level 4+ qualifications at 87.3%, along with Falkirk (89.1%) and Argyll and Bute (87.4%).
- The model-based unemployment rate in the Outer Hebrides was 4.4%, a decrease of 0.8% over the year. The Scottish average was 5.8%, a decrease of 0.4%.
- The percentage for those who have never worked has decreased by 1.7% over the year to 4.5%, while the Scottish average is 6.7%, an increase of 0.2% over the year.

The Office for National Statistics published Regional gross value added (income approach) in December 2017. This is available at three geographical levels (region, sub-region and local area).

Gross value added (GVA) is a measure of the increase in the value of the economy due to the production of goods and services. It is measured at current basic prices, which include the effect of inflation, excluding taxes on products.

The GVA estimates presented are on a workplace basis. GVA per head of population is a useful way of comparing regions of different size and is an important indicator for both domestic and European policy purposes. It is calculated by dividing total GVA by the total resident population of the region (including the economically inactive).

At a regional level in 2015, London had the highest GVA

per head at £43,629 while Wales had the lowest at £18,002. Scotland was £23,685, while England was 26,159.

The capital cities of Belfast (4.7%) and Edinburgh (4.5%) showed the strongest annual growth in GVA per head from 2014 to 2015. In contrast Aberdeen City and Aberdeenshire was one of the NUTS3 areas with the largest decreases over the year, -2.5%.

There are 173 NUTS (Nomenclature of Units for Territorial Statistics) areas. GVA per head increased in 151 of the 173 areas between 2014 and 2015.

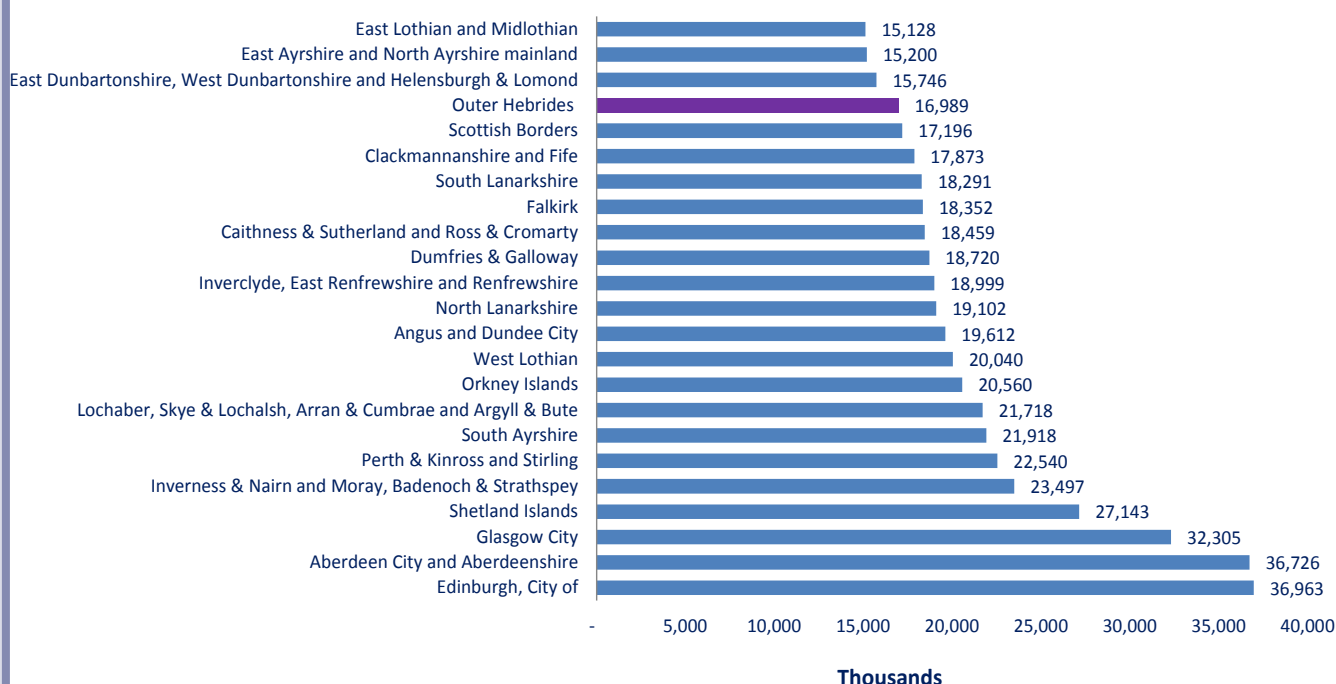
There were two Scottish areas in the top 10 NUTS3 areas -

Edinburgh City and Aberdeen City and Aberdeenshire. There were also two Scottish areas in the bottom 10 areas - East Ayrshire and North Ayrshire mainland and East Lothian and Midlothian.

As previously in 2014, and as illustrated in the chart below, in 2015 the Outer Hebrides had the 4th lowest GVA per head in Scotland.

Over the year 2014-15 the Outer Hebrides had a 3% increase (Scot.avg. 2%), the same percentage increase as over the decade 2005 - 2015, while the Scottish average was 26%. Over the period 1997 to 2015 there was a 62% increase in the Outer Hebrides, in comparison to the Scottish average of 78%.

GVA per head by NUTS 3 area, Scotland, 2015



Scottish House Condition Survey 2013-2015

Local authority analysis is available from the [Scottish House Condition Survey](#). Since the last release most levels of fuel poverty have decreased. The only exception to this is that fuel poor social housing has increased by 2% and family households has increased by 4%. Those living in 1 or 2 bedroom houses has also increased by 2%.

There are also increases with extreme fuel poverty with social housing increasing by 4%, family households increasing by 3% and other household types increasing by 6%. Those living in 1 or 2 bedroomed houses increased by 1%. Some key findings for the Outer Hebrides are:

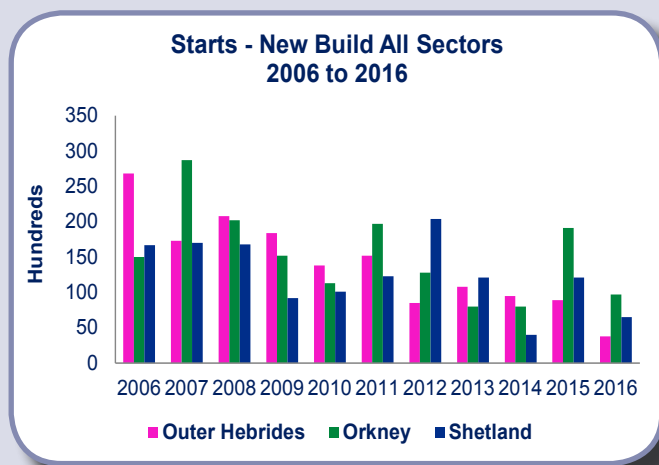
- Second highest level of fuel poverty at 59%, Scot. Avg. 34%
- Second highest level of extreme fuel poverty at 25%, Scot. Avg. 9%
- Third highest percentage of older households in extreme fuel poverty at 34%, Scot. Avg. 14%
- Highest level of fuel poor social housing households at 69%, Scot.avg. 32%
- Third highest percentage of fuel poor owner-occupied households at 55%, Scot.avg. 32%
- Second highest level of extreme fuel poor owner-occupied households at 26%, Scot.avg. 10%



New Build - Starts and Completions

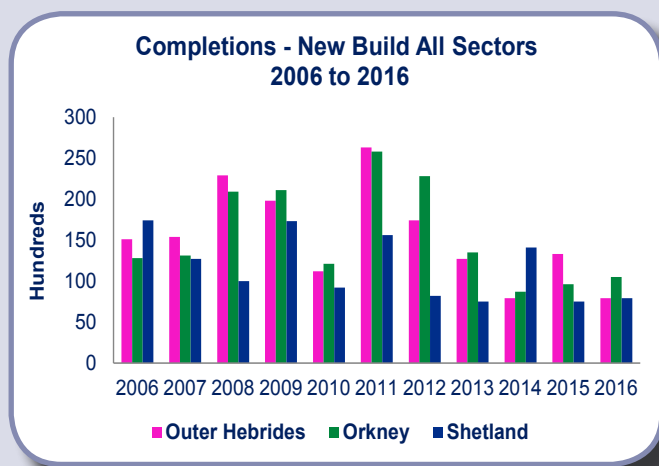
The [Housing Statistics for Scotland](#) web page has recently been updated by the Scottish Government. As illustrated in the adjacent charts, housing starts and completions for calendar years vary greatly over the last decade and between the island areas.

The highest number of starts in the Outer Hebrides was in 2006 with 268 starts while the lowest was in 2016 at 38. The highest number of completions was in 2011 at 263 while the lowest was in 2014 and 2016 at 79.



The trend for new build starts and completions decreasing is continuing. New build starts in Orkney and Shetland were higher than in the Outer Hebrides for 2016. Starts in 2016 in the Outer Hebrides were 86% lower than the number of starts in 2006 when there were 268 starts in comparison to 38 in 2016.

New build completions for 2016 were the same in the Outer Hebrides and Shetland while higher in Orkney. Completions in the Outer Hebrides were 48% lower than in 2006 when there were 151 in comparison to 79 in 2016.

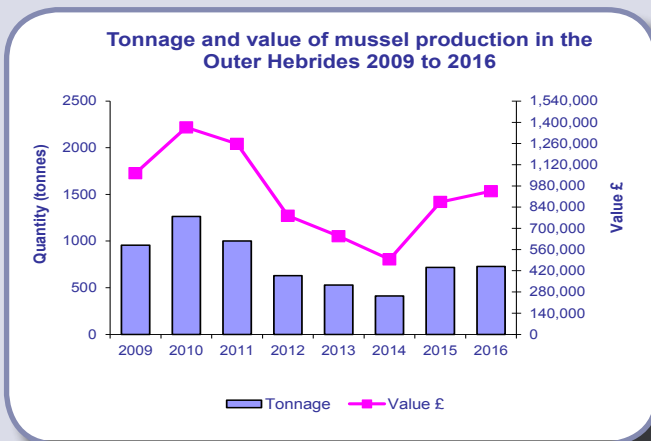


The number of households has increased in Scotland in every local authority over the last ten years. The Orkney Islands have seen the greatest relative increase in households. However, new build completions continue to be considerably lower since the economic downturn in 2007/08.

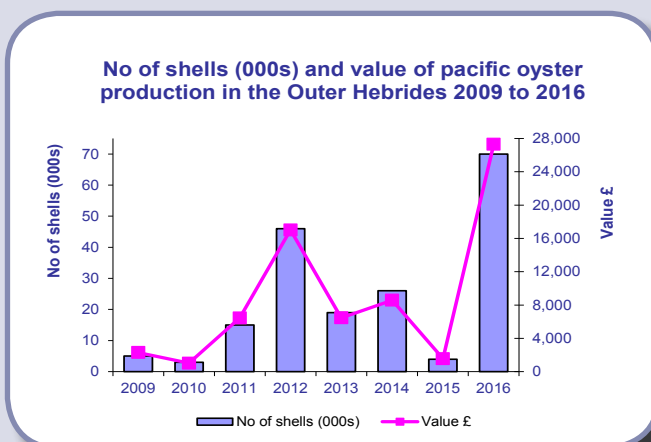
Fisheries

The Scottish Government released the [Scottish Shellfish Farm Production Survey 2016](#) on 31 May 2017. This reports on results from the returns of an annual survey sent to authorised shellfish farming businesses in Scotland. Some key findings:

- 47 active farm sites and 19 producing sites
- 14 businesses employing 24 male FT, 2 female FT, 6 males PT, 1 female PT, 3 casual males giving a total of 36 employees



The chart above shows mussel production in the Outer Hebrides from 2009 to 2016. After reaching its lowest point in 2014 mussel production is now on the increase. There was a decrease of 24% in tonnage from 2009 to 2016 and a decrease of 11% in value over the same period.



The number of pacific oyster shells produced in the Outer Hebrides has had a massive increase from 5,000 in 2009 to 70,000 in 2016. This has resulted in an increase in the value from £2,300 to £27,300 over the same period.

Tourism

Information from [VisitScotland](#) showed that the number of people employed in the industry in Scotland grew by 11%. Edinburgh and Glasgow are the two biggest tourism employers. In total the tourism industry accounts for 9% of the total number of jobs in Scotland.

Many local authorities experienced significant growth in tourism employment, with the Outer Hebrides having one of the largest increases showing an increase of 22% from 2014 to 2015. Tourism employment in the Outer Hebrides was 1,100 and represented 10% of the total employment in the Outer Hebrides in 2015.



Key Reported Road Casualties

Transport Scotland published the [Key Reported Road Casualties Scotland 2016](#) on 14 June 2017. These are provisional figures. Results for the Outer Hebrides show that there were a total of 24 accidents in 2016, of which 5 were serious. There were no fatal accidents.

The 2004-08 average gave a total of 47 accidents with 2 fatal and 11 serious. Provisional figures for the 2012-2016 average shows a decrease in the number of accidents, giving a total of 28 of which 2 were fatal and 4 were serious.

Alongside this, the figures show that for 2016 there were 28 casualties, with 5 serious and no fatalities.

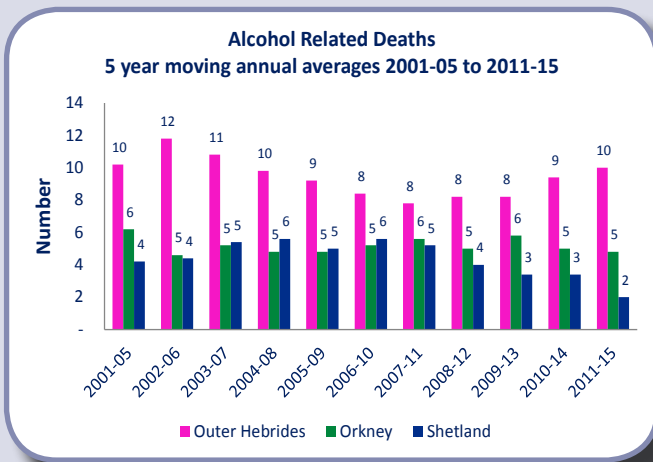
The 2004-08 average gave a total of 71 casualties of which 14 were serious and 2 were fatal. The provisional for the 2012-2016 average gives a total of 36 casualties with 5 serious and 2 fatal, showing a downward trend in the number of casualties.

Health

Since 1994, alcohol-related death rates in Scotland have tended to be higher for both sexes compared with the other UK countries. Alcohol-related death rates amongst the other countries have, broadly speaking, been similar to each other over the period 1994 to 2015.

All four UK countries had higher rates of alcohol-related deaths in 2015 than in 1994 despite recent declining trends since the mid-2000s. Males in Scotland experienced the fastest decrease in alcohol-related death rates since 2003. Despite the decrease in the alcohol-related death rate in Scotland among males, the rate in 2015 (30.0 per 100,000 males) remains higher than that in 1994 (23.3 per 100,000 males).

National Records of Scotland publish information on specific causes of death. The chart below shows the 5 year moving annual averages for alcohol related deaths in island areas from 2001-05 to 2011-15. Over this period the Outer Hebrides continues to have a higher number of alcohol-related deaths than that of Orkney and Shetland.



Looking back at previous decades the number of alcohol-related deaths was much lower with 4 deaths in 1991-95 and 3 in 1981-85. The highest number was recorded in 2002-06 with an average of 12 deaths.

The highest number of deaths in a single year was recorded in 2014 with 15 deaths. There were 11 in 2015.

The latest figures from the Office for National Statistics reveals that information from the Annual Population Survey shows that the percentage of current smokers (aged 18 years and above) has increased from 11.6% in 2015 to 13.2% in 2016 in the Outer Hebrides.

A five year study of 250,000 UK commuters showed that regular cycling cut the risk of death from any cause by 41%, the incidence of cancer by 45% and heart disease by 46%.

Walking also cut the risks but the benefit was mostly for those walking more than six miles per week.

However, a representative from Cancer Research UK said:

“This study helps to highlight the potential benefits of building activity into your everyday life.

“You don’t need to join a gym or run the marathon.

“Anything that gets you a bit hot and out of breath - whether it’s cycling all or part way to work or doing some housework - can help make a difference.”

In separate research carried out by Loughborough University and the University of Sydney they analysed data on 64,000 adults in England and Scotland aged over 40. They analysed the time people spent doing exercise and their health over 18 years.

The survey found that cramming all your recommended weekly exercise into one or two weekend sessions is enough to produce important health benefits.

It is also important to note that being active without managing 150 minutes of moderate activity a week was still enough to reduce the risk of an early death by a third.

How much physical activity should I do?



People aged 19-64 should try to do:

- at least 150 minutes of moderate aerobic activity, such as cycling or fast walking every week, and
- strength exercises (such as lifting weights) on two or more days a week that work all the major muscles.

Or

- 75 minutes of vigorous aerobic activity, such as running or a game of singles tennis every week, and
- strength exercises on two or more days a week that work all the major muscles.

Or

- a mix of moderate and vigorous aerobic activity every week, such as two 30-minute runs plus 30 minutes of fast walking, and
- strength exercises on two or more days a week that work all the major muscles.

Education

In June 2017 [Summary Statistics for Attainment, Leaver Destinations and Healthy Living No. 7: 2017 Edition](#) was published by the Scottish Government. The results for the school meals and PE surveys were collected in February 2017.

- Of those registered for free school meals in primary schools in the Outer Hebrides 87% of those present took free meals (Scot.avg. 82%).

- Of those present 78% of primary pupils in the Outer Hebrides took meals (free or paid for) on the census day (Scot.avg. 65%).
- Of those registered for free school meals in secondary schools in the Outer Hebrides 81% of those present took free meals (Scot. avg. 73%).
- Of those present 81% of secondary pupils in the Outer Hebrides took meals (free or paid for) on the census day (Scot.avg. 44%).
- Within individual primary schools the percentage of those taking meals (free or paid for) varied from 55% to 100%. In 17 of the 22 primary schools over 70% of pupils in the Outer Hebrides took school meals.
- The percentage of those taking meals (free or paid for) was 70% or over for all 4 secondary schools.
- 100% of pupils in primary schools in the Outer Hebrides (Scot.avg. 99%) and 100% of pupils in secondary schools (Scot.avg. 93%) are meeting the PE targets.
- In the 2015/16 school year in the Outer Hebrides there were 252 school leavers. Of those 96.4% of went in to a positive destination. Of those 40.9% went into higher education, 15.5% went into further education, 36.5% went into employment. Those going into other destinations were less than 5% and so figures were unavailable.
- In the 2015/16 school year 20.6% of school leavers in the Outer Hebrides achieved a highest level of achievement at level 5 - National 5 A-C (Scot.avg. 23.9%). 92.1% of leavers achieved 1+ qualifications at level 5 or better (Scot.avg. 85.6%)
- 50.6% of school leavers achieved level 6 - Higher A-C (Scot.avg. 42.6%). 71.5% of leavers achieved 1+ qualifications at level 6 or better (Scot.avg. 61.7%).
- 20.9% achieved 1+ qualifications at level 7 - Advanced Higher A-C (Scot.avg. 19.1%).

Heritage Index 2016

The Royal Society for the encouragement of Arts, Manufactures and Commerce (RSA) have introduced a Heritage Index which ranks which areas are making best use of their heritage assets through activities such as volunteering, the number of people visiting museums and the number of nights people spend on holiday in a local area. This index is based on 120 indicators.

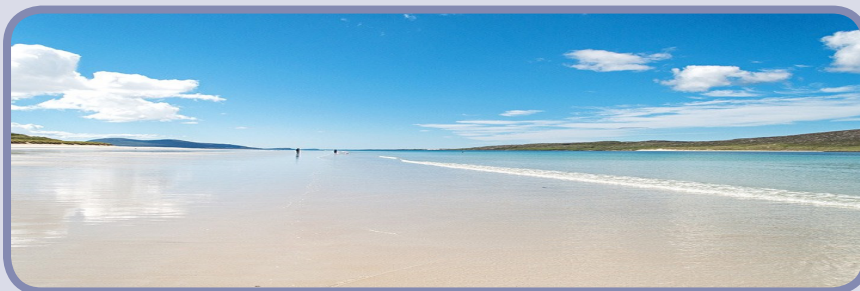
In Scotland the Outer Hebrides are now in 3rd place in the top ten in the Index. Orkney are

in 1st place. The first index was released in 2015 and the Outer Hebrides have now moved up one place since last year.

Trip Advisor Travellers' Choice Awards top 10 UK Beaches.

Luskentyre beach is once again appearing in top 10 awards. Luskentyre was placed at number 4 in the top 10 UK beaches by Trip Advisor travellers.

It was the only Scottish beach to make the list which was topped by Weymouth Beach in Dorset.



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