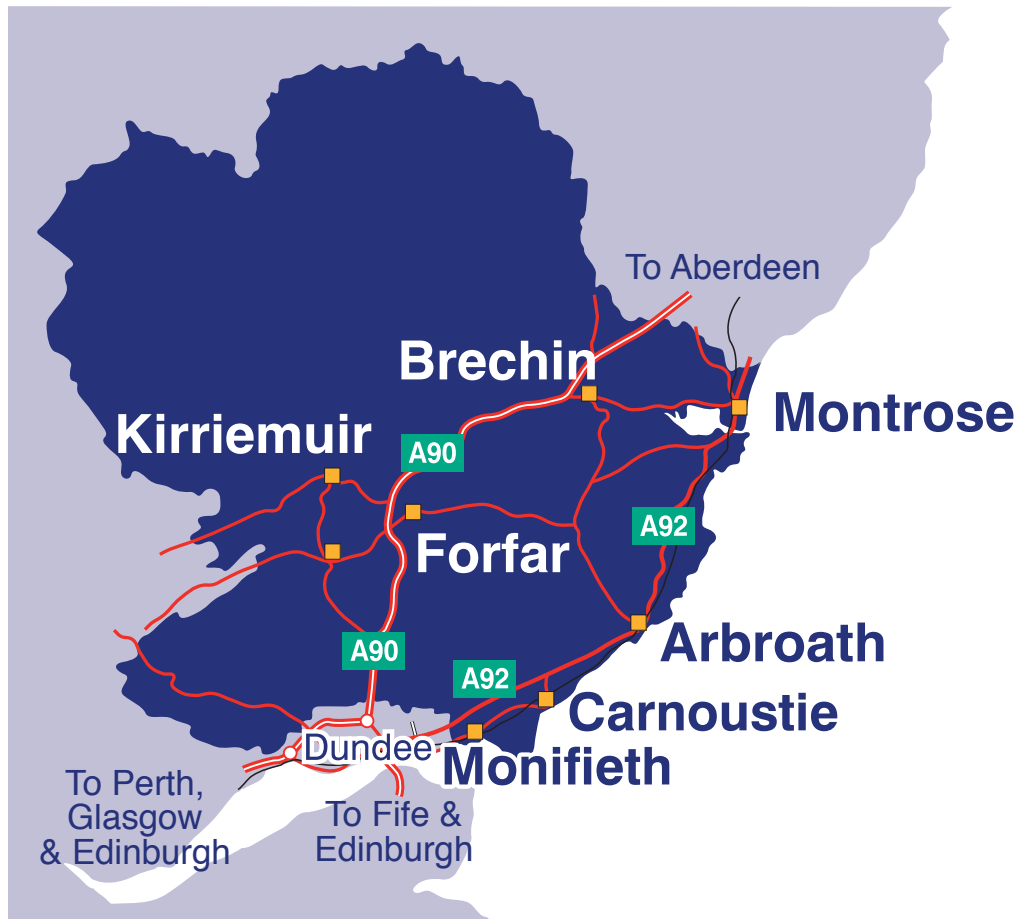


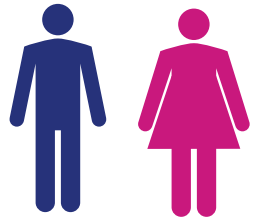
Angus Economy At A Glance



Agriculture
Oil
Digital Media
Food Processing
Fishing
Engineering
Gas
Pharmaceuticals
Textiles
Tourism

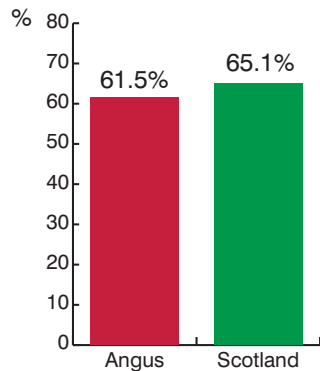
What Do We Know About The Population Of Angus?

Population
116,200

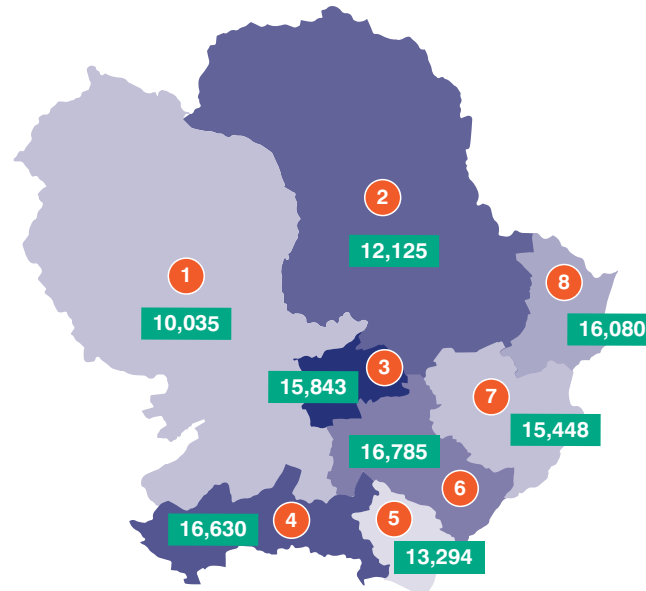


48.7% **51.3%**

71,500
Aged Between **16-64**



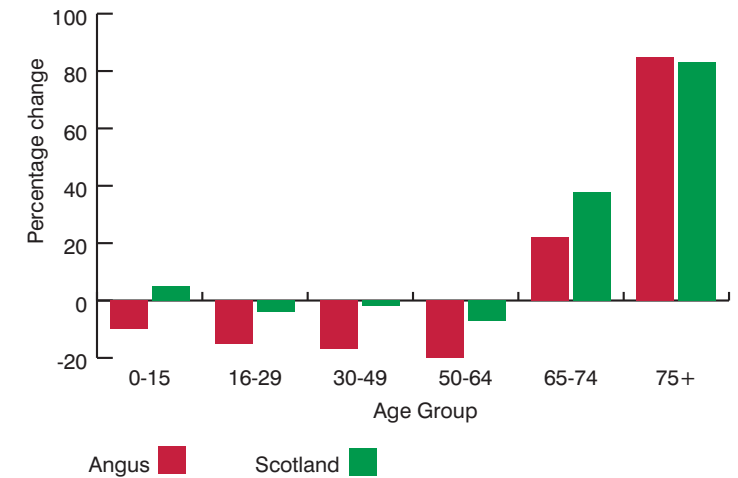
Ward Map With Population



- 1 Kirriemuir and Dean
- 2 Brechin and Edzell
- 3 Forfar and District
- 4 Monifieth and Sidlaw
- 5 Carnoustie and District
- 6 Arbroath West and Letham
- 7 Arbroath East and Lunan
- 8 Montrose and District

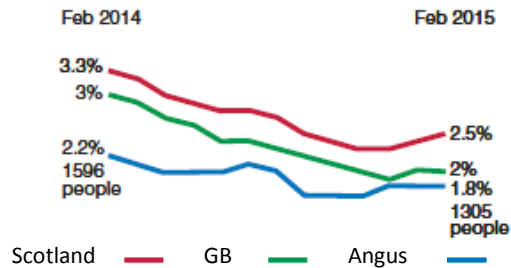
Percentage change in population in Angus and Scotland, 2017-2037

2012 based projections, National Records of Scotland

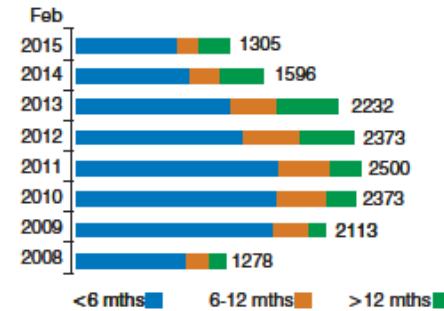


What Do We Know About Unemployment In Angus?

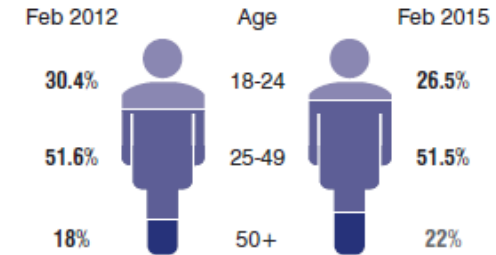
Job Seekers Allowance (JSA)



JSA By Length of Claim

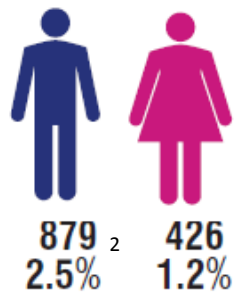


JSA By Age

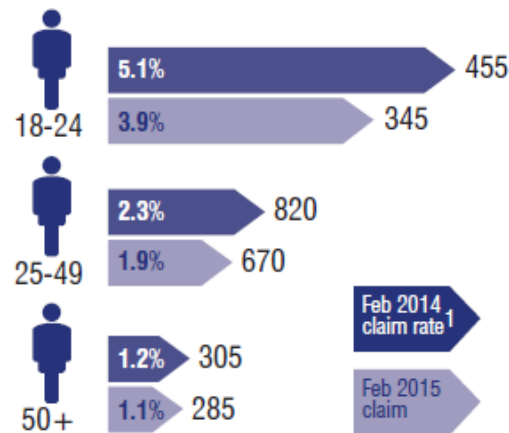


In February 2015 over a quarter of all JSA claimants were 18-24.

JSA Claimants



JSA From 2014 to 2015



In the last year the youngest age group experienced the highest percentage decrease of JSA claimants.

In November 2014, **8.9%** of 16-64 year olds were claiming key out of work benefits (compared to Scotland figure of **11.4%**) – a reducing trend. (DWP benefit claimants/NOMIS)

4.4% of people aged 16+ have never had a paid or unpaid job (2013).³

Source: Office for National Statistics claimant count/NOMIS

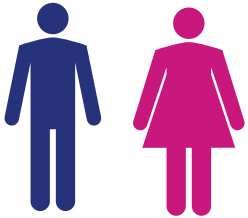
¹% is number of persons claiming JSA as a proportion of resident population of the same age

²% is a proportion of resident population of area aged 16-64

³ Annual Population Survey (Jan-Dec 2013)

How Economically Active Are Angus Residents?

55,900 people - **76.8%**
of the Angus working age
population are economically
active.

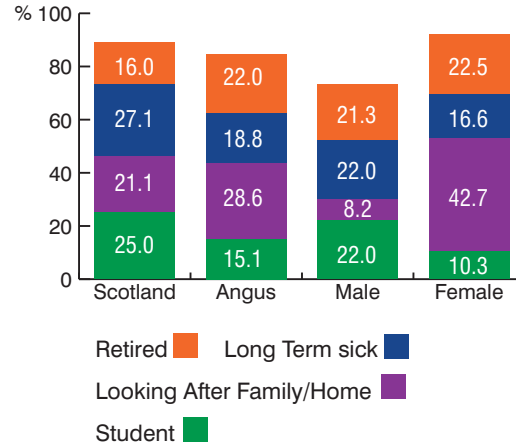


89% **56.7%**
Full-Time Full-Time

11% **43.3%**
Part-Time Part-Time

(Office of National Statistics Annual
Population Survey Jan-Dec 2014)

Percentage Breakdown of Main Reasons For Inactivity



Who Is Economically Inactive?

(not in employment or unemployed)

23.2% of 16-64 year olds

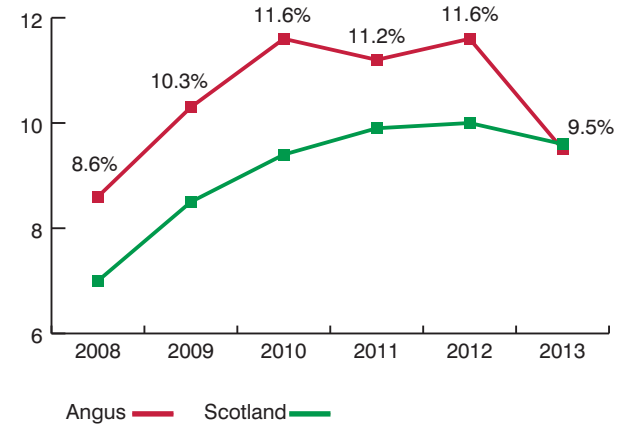
19.3% Males

27.0% Females

22.5% In Scotland

(Office of National Statistics Annual
Population Survey Jan-Dec 2014)

Underemployment (16+)



In 2013, 4,600 people over 16 were
looking for additional hours/an
additional job with more hours.

19.4% of 16-14 year olds in Scotland
would have liked to work longer hours,
given the opportunity.

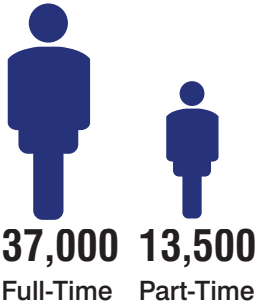
(Office of National Statistics Annual
Population Survey Jan-Dec 2013)

What Do We Know About The Angus Workforce?

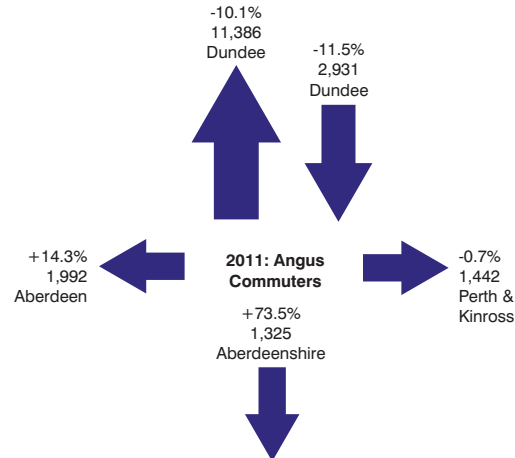
The proportion of the population that is 16-64 is declining and is forecast to drop by **16%** by 2037 to 60,000.

2014: **55,900 (76.8%)** economically active (in employment or looking for work).

In Employment



Commuters



+/- change from 2001 (Census 2011, in Tactran Draft Regional Transport Strategy Refresh 2015)

Self Employed



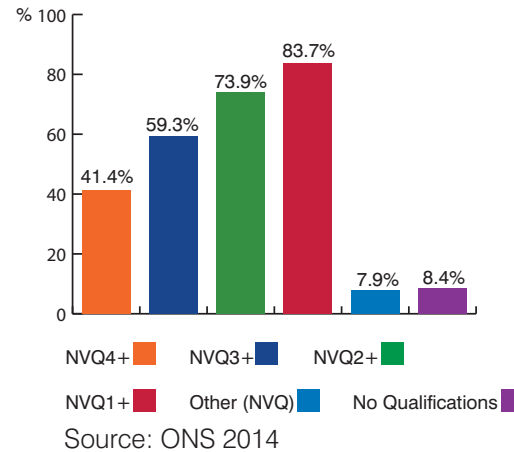
9.5%

Male 5,000 Male 2,700 females
(Office of National Statistics Annual Population Survey Dec 2014 % of 16-64)

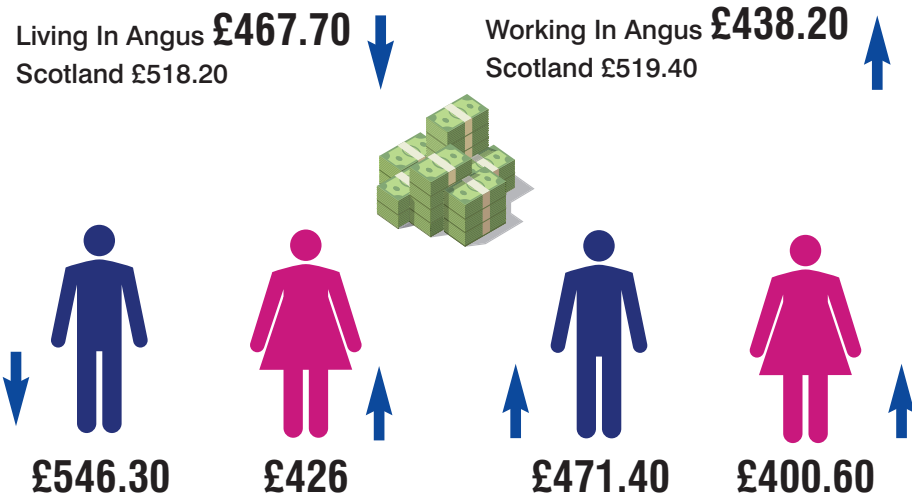
There is a slowly increasing trend of in-work poverty in Scotland.

In 2012/13 over half (**52%**) of working age adults in poverty in Scotland were in working households. **60%** of children in extreme poverty lived in working households.
(Scottish Government Poverty Briefing 3.15)

Qualifications – Aged 16-64



Median Weekly Wages 2014



Arrows compare to 2013. Source: ONS annual survey of hours and earnings - resident/workplace analysis

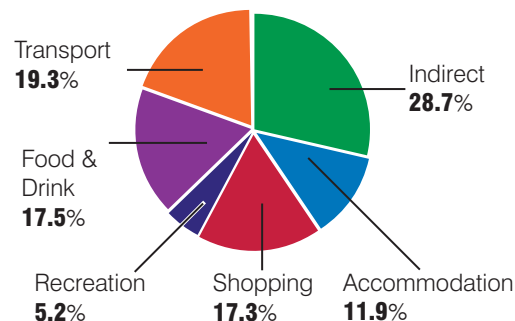
What Does Internationalisation Look Like?

In Angus



Angus Business Survey 2014:
20% of respondents
 export products and/or services
 Including:
 'All over Europe, China, Japan,
 South America, Russia.'
 'Mainly the US, but probably 30-40 other
 countries via eBay.'
 'New Zealand, Arab Emirates, Norway,
 Germany, Holland, Angola, Italy.'

Tourist Economic Impact



The Economic Impact of tourism
 in Angus in 2014 was
£187.79 million.
 (STEAM Draft Trend Report for 2009-2014
 Angus Council)



£2.7 million has been approved for
 the rural development programme
 LEADER in Angus for 2015-2020.

In Scotland



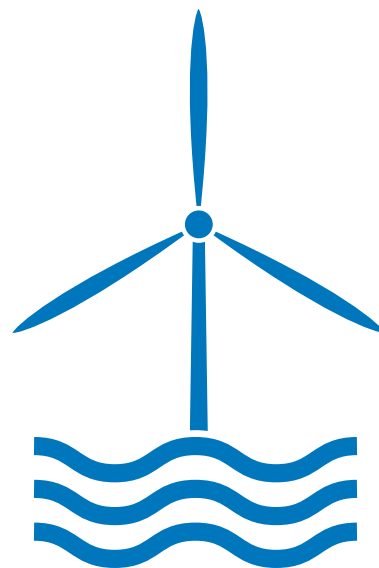
The USA is Scotland's top international
 export destination country – an
 estimated **£3.9 billion** exports in
 2013. Next biggest markets are
 Netherlands (perhaps for onward
 supply), Germany, France and Denmark.
 (Scotland's Global Connection Survey
 2013)



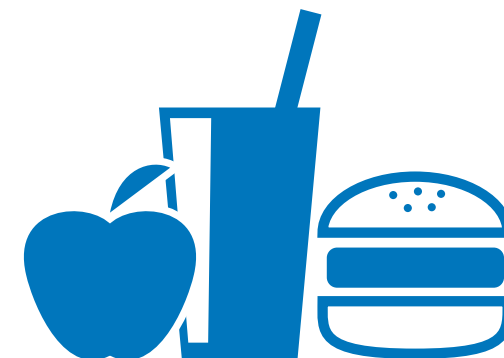
The European Union is the world's
 largest single market – 500 million+
 citizens.
 Free movement of goods, services,
 capital, people.

Destination for just under half of
 Scotland's international exports – **46%**
 in 2013, with an estimated value of
 around **£12.9 billion.** (Scotland's
 Global Connections Survey 2013)

**Bilateral trade deals via EU allow for
 preferential, often free, access to
 markets.**



Scotland has **25%** of Europe's off-
 shore wind and tidal resource and also
10% of Europe's wave resource.



The Food and Drink sector makes the
 second largest contribution (after the oil
 refining sector) to total Scottish exports
 to the EU with over **£1.5 billion** of
 exports.

Source: Angus Council Economic Development (except where otherwise specified)

What Do We Know About Business In Angus?

3615 Enterprises

4485 Local Units

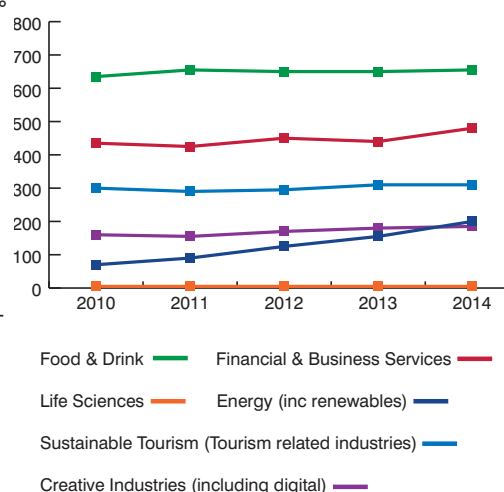
(Inter Departmental Business Register ONS 2014)

Angus has more businesses employing fewer than ten people than the Scottish average, and fewer than the Scottish average in all other employee bands.¹

Business By No. Of Employees



Number Of Growth Enterprises In Angus 2010-2014²



Average Wages In Growth Sector Industries 2014² (Scotland)

Food & Drink	£458
Financial & Business Services	£566
Life Sciences	£671
Energy	£721
Sustainable Tourism	£330
Creative Industries	£545

2590 (72%) of Angus enterprises have a turnover of under **£250,000**.

55 have a turnover of **£5m+**.

There are **547** registered charities in Angus with a total combined income of just over **£36m**.

The top **49** registered charities in Angus have a combined income of just over **£28m**.

The rate of new business registrations in Angus has steadily increased from 2009-2013, from 28-42/10,000 population. De-registrations have fluctuated with no overall change: 29/10,000. (Scottish Neighbourhood Stascs)

61.8% of businesses in Angus survived their first three years from 2010 to 2013. This is higher than the Scottish average (**57.1%**).

2014/15

9 investment projects created

264 new jobs

139 jobs safeguarded

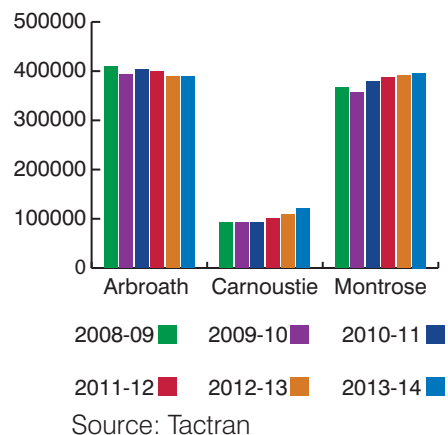
£25.3m related capital expenditure

(Angus Council Economic Development)

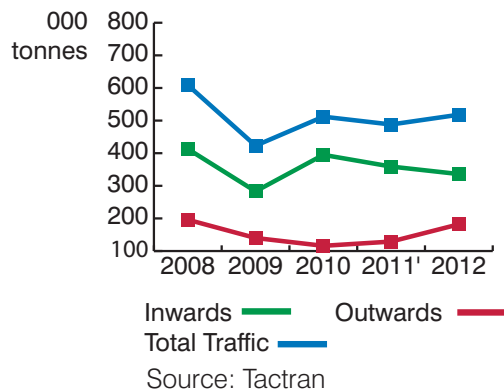
¹ONS Local Units by employment size band Oct 14; ² Scottish Government Economic Strategy Growth Sector Statistics – Local Authority Area Growth Sector Database <http://www.gov.scot/Topics/Statistics/Browse/Business/Publications/GrowthSectors/LADatabase>

What Do We Know About Infrastructure In Angus?

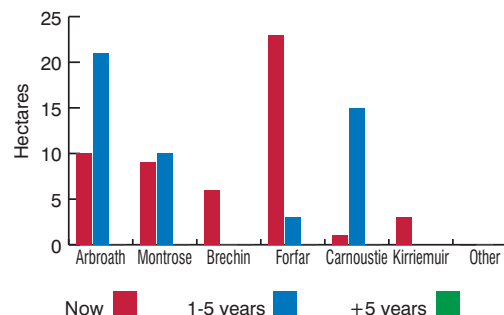
Rail Station Entries and Exits



Montrose Port 2008-2012



Employment Land Availability By Location

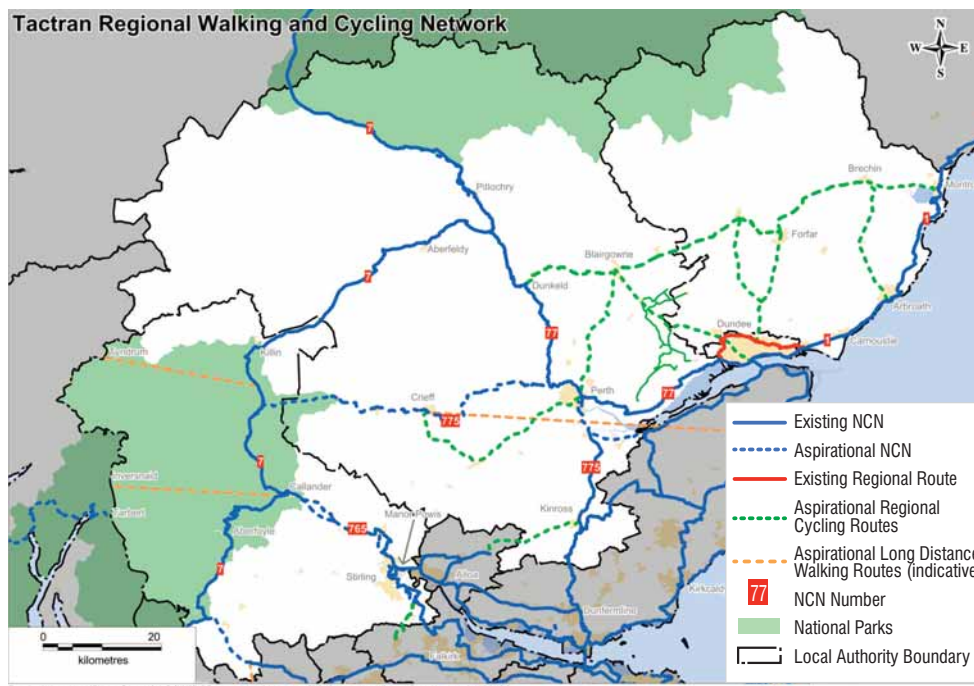


Employment land available (June 2014):
 within one year: 37.49ha
 in 1-5 years: 50.00ha.
 Source: Angus Council 2014

As at June 2014, Angus had around 37 public wifi hotspots compared to an average of 210 per local authority across the UK.

73.9% of Angus is covered by superfast broadband - on target to meet **93%** coverage by end 2017.
 (Apr 2015 – Angus Council)

There is no 4G coverage in Angus.
 (Ofcom Infrastructure Report 2014)

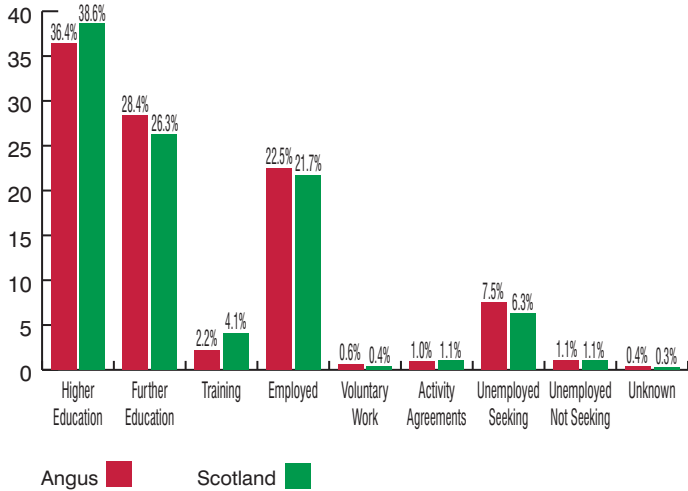


No decision yet on Laurencekirk junction (improved access to Montrose).

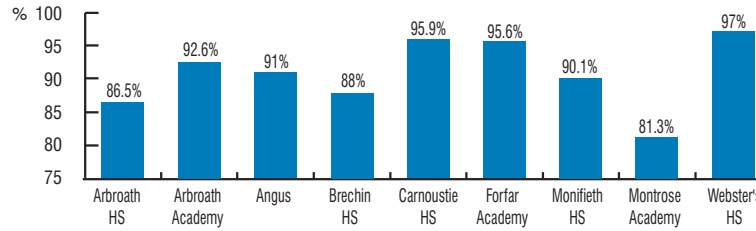
Source: Tactran Regional Transport Strategy 2015 - 2016 Refresh Draft March 2015

How Are People Moving From Education To Work?

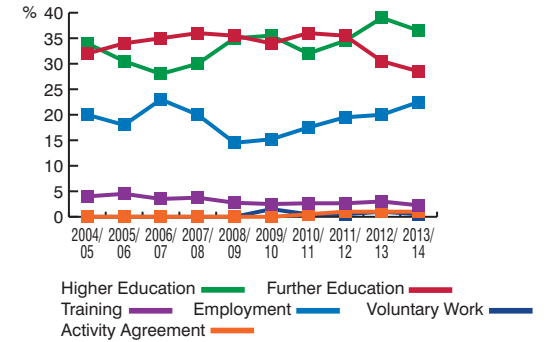
Destination Of School Leavers 2013/14



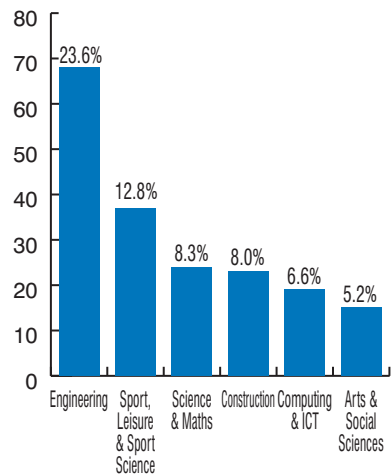
Initial Positive Destinations By School 2014



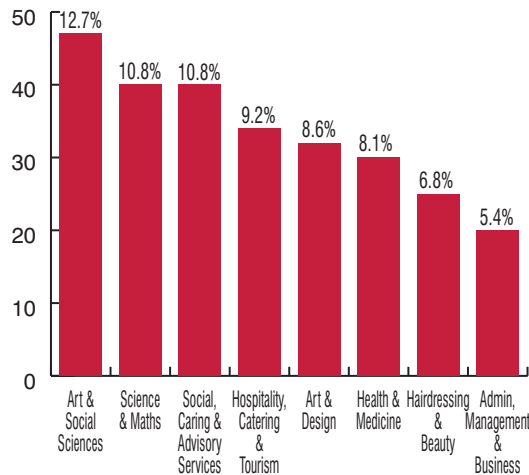
Changes In Destination Over Time



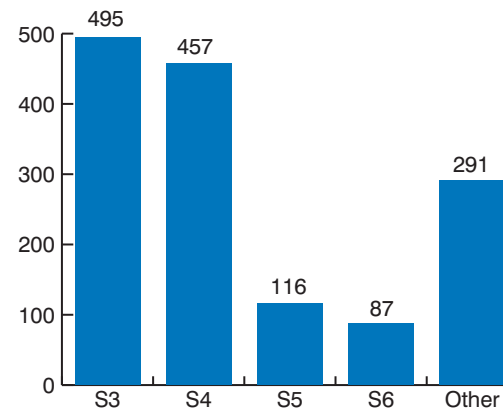
Top HE/FE Course Areas Male Only



Top HE/FE Course Areas Female Only



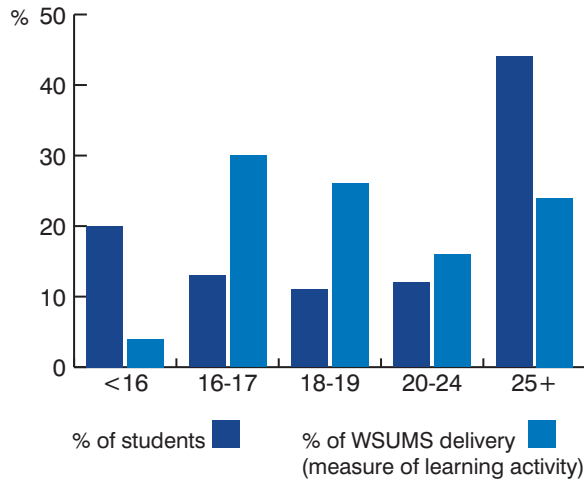
Pupils Attending 'Link' Courses



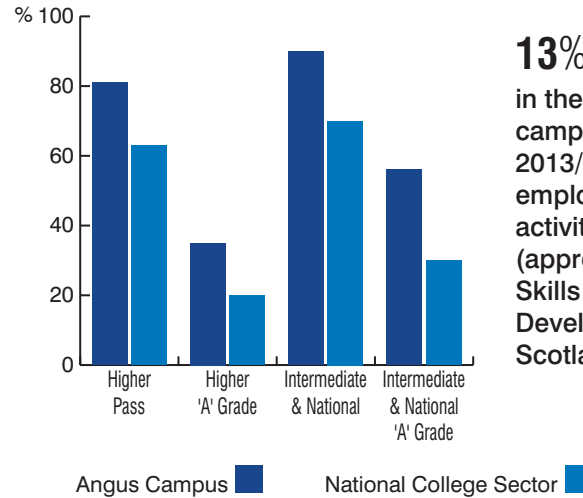
School/College Partnership: 1446 Angus school pupils attended 'School Link' type courses at D&A College's Angus campus in 2013/14.

How Are People Moving From Education To Work?

Students At D&A College - Angus Campus 2013/14 - By Age Group



SQA Results (Angus Campus)



13% of delivery in the Angus campus in 2013/14 was employer related activity (apprenticeships, Skills Development Scotland etc).

Modern Apprentices 1/4/14 - 26/12/14	Starts	Leavers	In Training as at 31/03/14	Achievements	Achievements as a % of All Leavers
Angus All Ages	513	524	1028	407	78%
Angus 16 - 19	356	256	742	201	79%
Angus 20-24	96	130	194	102	78%
Angus +25	61	138	92	104	75%

Source: Skills Development Scotland

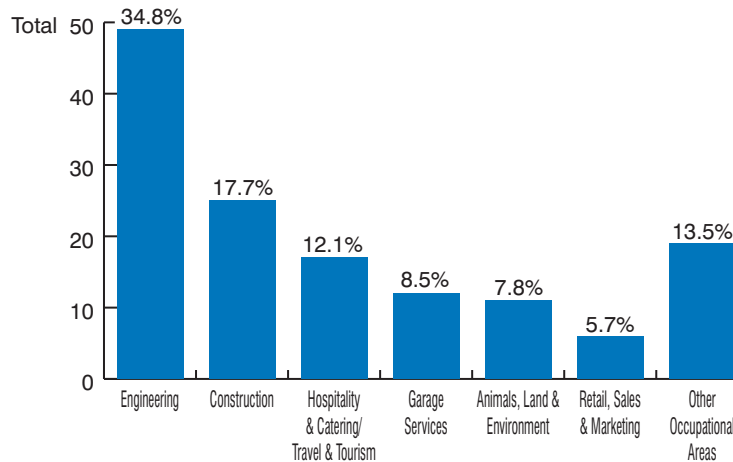
D&A College

Youngest and oldest age groups tend to enrol on shorter courses. Most full-time students are 16-19.

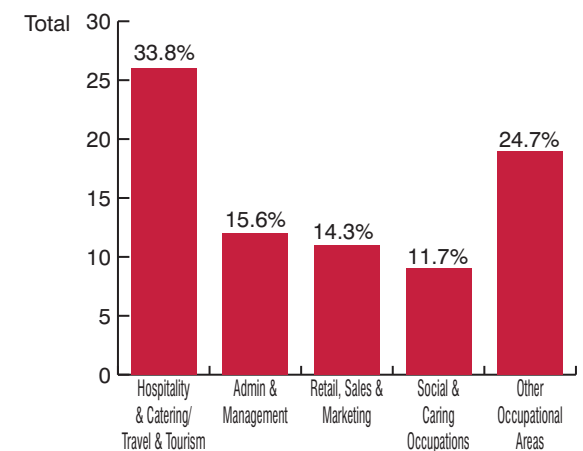
6740 students attended college in Angus in 2013/14 (78% of them from Angus), with a further **1305** Angus resident students attending at Dundee campuses.

96% Angus students at Angus campus progressed to a positive destination in 2013/14.

*Top Occupational Areas Male Only



*Top Occupational Areas Female Only



Source: D&A College 2013/14; *Skills Development Scotland Initial: School Leaver Destination Return 2013/14 - occupational areas

Local Profiling – Some Examples

Economy

Area	Total Population: mid-year estimates 2013	Working Age Population: mid-year estimates 2013 %	Total Number of School leavers : 2012/2013	School Leaver Destinations Higher Education : 2012/2013 %	School Leaver Destinations Further Education : 2012/2013 %	School Leaver Destinations Training : 2012/2013 %	School Leaver Destinations Employment 2012/2013 %	School Leaver Destinations Unemployed and seeking employment or training: 2012/2013 %	Positive leaver destination: 2012/13 %	Claimant Count Rate Total: (Not seasonally adjusted) 2013M07 %	Claimant Count Rate Male: (Not seasonally adjusted) 2013M07 %	Claimant Count Rate Female: (Not seasonally adjusted) 2013M07 %	Total no business sites : 2014
Scotland	5,327,700	63.08	52,611	36.5	27.8	6.3	20.9	7.1	90.0	*3.8	*5.2	*1.9	197,925
Angus	116,240	59.17	1,070	38.5	30.9	3.8	21.1	4.5	92.7	2.9	3.9	2.0	4,350
Monifieth West	2880	54.58	30	46.7	13.3	3.3	16.7	16.7	82.8	1.5	2.2	0.8	25
Monifieth East	4737	50.58	51	58.8	13.7	0	23.5	3.9	96	1.2	1.3	0.3	115
Carnoustie West	5106	59.07	45	33.3	33.3	6.7	17.8	6.7	82.2	2.9	4	1.8	105
Carnoustie East	5476	54.99	48	50	22.9	6.3	20.8	0	97.9	1.3	1.7	0.8	145
Monikie	4823	59.34	40	22.5	40	5	32.5	0	97.5	1.3	1.8	0.5	175
South Angus	6902	60.79	55	56.4	14.5	5.5	21.8	0	92.5	1.1	1.7	0.2	225
Arbroath Keptie	3725	56.48	36	41.7	30.6	2.8	25	0	100	2.8	3.8	1.6	90
Arbroath Harbour	4730	63.28	38	18.4	42.1	2.6	31.6	5.3	94.6	8.2	12.3	4.2	325
Arbroath Kirkton	5325	58.48	42	26.2	45.2	2.4	19	4.8	90.5	3.4	4.4	2.3	140
Arbroath Clifftown	4922	59.18	56	32.1	44.6	5.4	8.9	8.9	83.9	5.7	7.4	4.1	50
Arbroath Warddykes	4786	60.97	42	26.2	50	2.4	11.9	4.8	92.7	6.4	8.5	4.5	55
Letham and Glamis	5522	59.04	52	51.9	26.9	0	17.3	3.8	94.2	1.2	0.8	1	320
Kirriemuir Landward	2758	60.88	30	40	16.7	0	36.7	6.7	93.3	1.5	1.7	0.3	155
Forfar West	4762	58.15	39	43.6	33.3	5.1	7.7	7.7	92.3	3.1	3.7	2.4	90
Forfar Central	4961	59.97	50	22	56	4	10	4	88	5.2	6.4	4.2	255
Forfar East	3968	57.21	39	64.1	17.9	0	7.7	5.1	89.7	2.4	3	1.8	160
Lunan	2894	61.09	25	28	24	8	32	4	88	2.1	2	2.1	145
Friockheim	7237	64.07	74	29.7	27	2.7	36.5	2.7	93.2	1.6	2.3	0.9	415
Kirriemuir	6112	57.4	73	45.2	24.7	5.5	21.9	2.7	93.2	2.5	3.5	1.2	170
Montrose South	5664	62.01	35	14.3	54.3	2.9	20	8.6	94.3	4.7	6.4	2.8	295
Montrose North	4750	60.93	38	39.5	31.6	7.9	18.4	2.6	94.7	2.4	3.1	1.7	145
Brechin East	3237	60.95	33	33.3	39.4	6.1	15.2	6.1	97	6	8.4	3.2	75
Brechin West	3600	58.36	48	27.1	33.3	2.1	29.2	8.3	93.8	2.9	3.8	1.8	200
Hillside	3746	58.06	28	53.6	10.7	3.6	28.6	3.6	100	1.2	1.9	0.3	185
Angus Glens	3617	59.8	29	55.2	20.7	6.9	17.2	0	100	1.4	1.7	0.8	295

Note: The greatest variance between the geographic areas has been highlighted by using **GREEN** for the most positive and **RED** for the least positive. Other variances between the geographic areas have been highlighted by using **YELLOW** for the highest numbers/percentages and **BLUE** for the lowest.

Source: SNS; *ONS claimant count with rates and proportions (NOMIS)