



PLANNING &
DEVELOPMENT SERVICE

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COUNCIL AREA POPULATION PROJECTIONS 2006 - 2031

June 2008

SUMMARY

According to figures from the General Registers Office for Scotland:

- If the trends experienced during the period from 2001 to 2006 continue, the population of Highland is expected to grow by 11% to 238,795 in 2031.
- Deaths will exceed births across Highland as a whole and growth will be the result of net inward migration of 1,200 people per year.
- There are significant differences between our former areas, with the highest rates of projected growth in Inverness, Nairn and Badenoch & Strathspey, and projected falls in Caithness and Sutherland.
- The percentage of children will rise slightly in Inverness but fall in all other areas.
- The percentage of working age people will rise slightly in Inverness but fall in all other areas.
- The percentage of retired people will almost double, while the percentage of elderly aged 75+ will more than double.
- These projections are based on a continuation of past trends and do not take account of future policy initiatives which may influence our future population.

Introduction

In January 2008 the General Registers Office for Scotland (GROS) published its 2006 based population projections for Scottish Areas, which included figures for all Local Authorities. These projections follow their normal practice of assuming that recent trends for fertility, mortality and migration continue through the planning period (hence they are called 'projections' rather than 'forecasts'). The 2006 projections assume long term trends for fertility and mortality but migration is based on actual patterns over the relatively short period of 2001 to 2006. This was a time of strong economic growth in parts of Scotland and the projections show continued population increase for many areas, including a growth of 11% for Highland between 2006 and 2031 (by 23,009 people from 215,310 to 238,319). A single Highland wide projection hides significant local variations and this note presents projections for our eight former operating Areas, which are the smallest areas for which GROS is able to make migration profiles available. Equivalent figures are not available for our 22 Wards.

It is important to remember from the outset that population projections are based solely on past trends and do not take account of any policy initiatives which may influence the demographic profile of Highland in the future. They show what will happen if the current economic climate continues (both locally and internationally),

together with the social and demographic trends which accompany it. They do not take account of growth which will accompany future developments such as the UHI, or the success of regeneration initiatives such as in Caithness and North Sutherland. The projections therefore provide a baseline that allows for the monitoring of change and are not, in themselves, a definitive statement of the most likely future situation. They provide a starting point for our planning work and provide clear justification for the promotion of appropriate development opportunities.

In particular, Highland's population is heavily dependent on the level of future inward migration. The Note looks at the economic context to the trends used in the GROS projections and goes on to present detailed results. An Appendix discusses the projections for children, the working age population and the elderly and compares the current population with that for 1981 and the projection to 2031 to highlight the inevitability of an ageing population. Pen pictures for each former Area are given as a second Appendix at the end of the Note.

Context

The population of Highland grew by over 6,000 (3.1%) between 2001 and 2006 with a net inward migration figure of around 1,200 people per year, which is the long term figure that has been assumed in the GROS projection. This five year growth rate is similar to that for the long term period from 1960 to 1990. Popular belief is that inward migration to Highland is dominated by retired people but the reality is that, of the 8,000 plus people who move into Highland each year, 74% are aged 44 and under and only 6% are aged over 65. Although it is believed that lifestyle choice may well be important factor for all age groups, the availability of a good job at a decent rate of pay is crucial for the majority of movers.

Figure 1 shows that during the five years from 2001 to 2005 the economy of Highland grew at a faster rate than that of the UK as a whole, particularly in Inverness, Nairn, Moray, and Badenoch & Strathspey where the annual rate of growth was consistently around 50% higher than the UK average. There was an 11% increase in the number of jobs in Highland (11,000 new jobs) compared with 3% for Scotland as a whole. (Figures quoted here are for "NUTS3" area which combine former areas and include Moray and parts of Argyll and Bute with parts of Highland).

Figure 1: Economic Growth in Highland Compared with the UK and Scotland (for NUTS3 Areas)

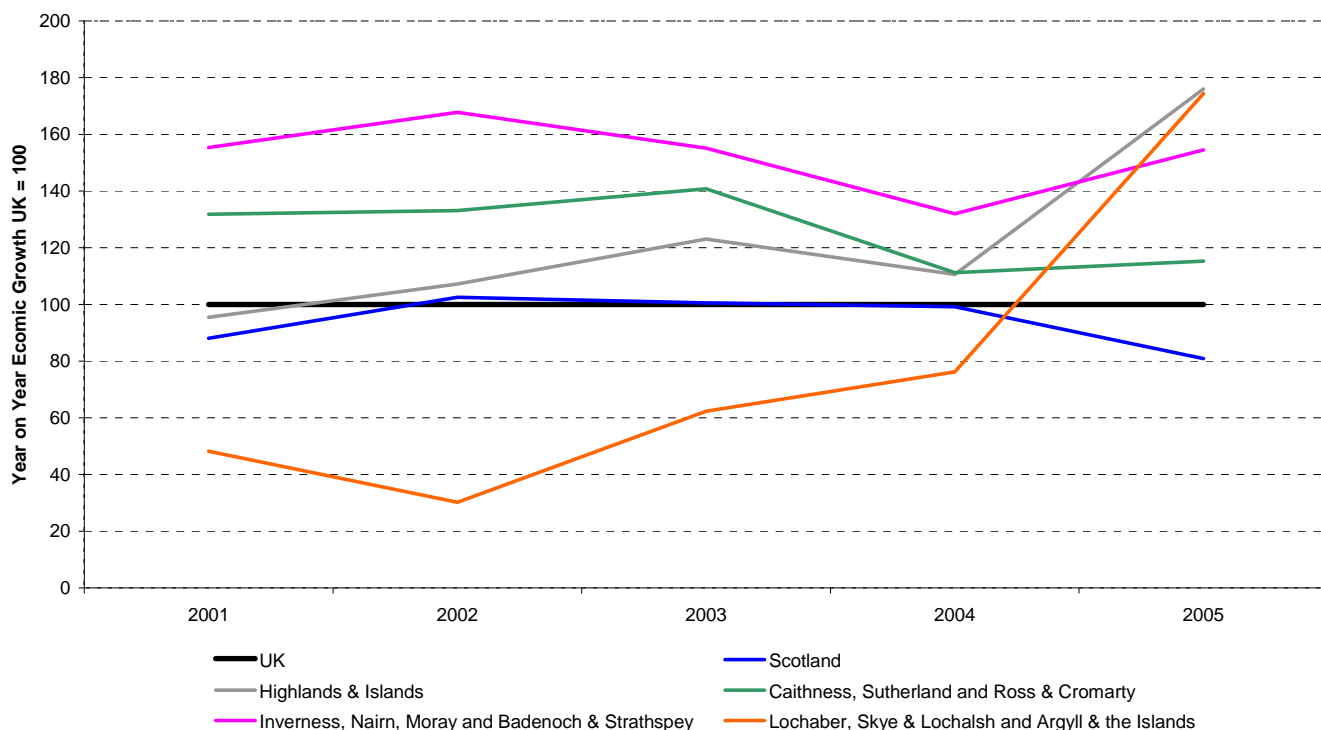
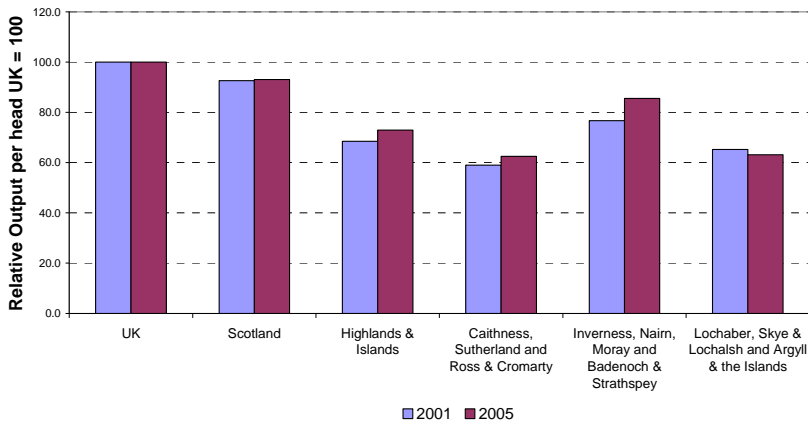


Figure 2: Economic Output in Highland Compared with UK and Scotland



Despite this recent strong growth the current performance of the Highland economy remains below that of Scotland and the UK (see Figure 2), and some of our rural areas are amongst the weakest in the UK. For many people moving into Highland, and particularly those making a lifestyle choice, house price differentials and the ability to achieve a quick sale may play a large part in the decision to move. Although house prices in Highland have increased by more than the Scottish average in

recent years - see Briefing Note 21 - the generally buoyant market has probably had a positive impact. (As of writing this note the full impact of the *credit crunch* is not clear but it is likely that any downturn in the housing market might make a move more difficult.)

In summary, the historic period on which the trends used in these projections are based was a positive period for the Highland economy and their realisation will be dependent on continued economic growth. The local signs are positive but we do not know how long the current world wide economic slow-down will last, or the impact it might have on Highland.

Factors Contributing To Population Change

Fertility and mortality rates have been derived by NHS Highland as adjustments to national rates, and based on analysis of births and deaths within Highland.

Fertility Fertility rates in Highland are above the national average with only 9 Local Authorities having higher rates. Within Highland, rates in Lochaber are well above the national average and fall to just below average in Badenoch & Strathspey and well below in Sutherland. Fertility rates have been falling during the last 20 years and this general trend is projected to continue until 2031, despite a modest increase in the number of births in Highland in five out of the last six years. The number of births per year is projected to fall by 11% between 2006 and 2031.

Mortality In 2004 to 2006 the life expectancy at birth in Highland was 77.9 years, slightly higher than the Scottish average of 77.2 years. Mortality rates are below the Scottish average in all areas apart from Caithness where they are similar to the average for men and above average for women. Both Highland and Scotland have seen improvements in mortality and life expectancy throughout recent years and life expectancy is expected to increase by some five years between 2006 and 2031.

Migration The migration profile by age and gender used in the Area population projections is the four year average of movements between 2002 and 2006 based on registrations with doctors. The age and gender profile was applied to the annual inward and outward migrant figures used by GROS in their 2006 Highland projection, giving long term net annual migration figures from 2012 onwards shown in Table 1.

Badenoch & Strathspey	110
Caithness	-20
Inverness	490
Lochaber	40
Nairn	120
Ross & Cromarty	300
Skye & Lochalsh	90
Sutherland	70
Highland total	1,200

The Highland wide migration profile shows a strong general trend of young people in the 15 to 19 age group moving out and aged 20 onwards moving in. However, there are a number of differences in the age profiles by area which highlight some interesting population dynamics:

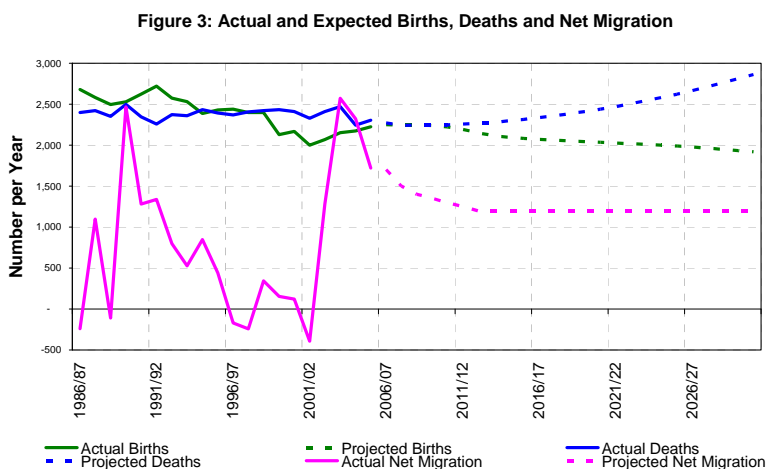
- All areas experience high rates of outward migration in the 15 to 19 age group as young people leave Highland for further and higher education and to take advantage of a wider

employment market.

- This trend is more marked for women than it is for men, particularly in Caithness, Sutherland, Skye & Lochalsh and Ross & Cromarty.
- Inverness has higher rates of migration (both inward and outward) than the other areas in all age ranges apart from the over 50s, and loses fewer young people.
- There is more variation in trends in inward migration between areas than in outward migration, and women tend to move into Highland at younger ages than men with the highest rates in the 20 to 24 age group in all areas apart from Nairn and Sutherland.
- For men, trends are less pronounced and only Caithness and Ross & Cromarty have the highest rates of inward migration in the 20 to 24 age group
- Nairn gains relatively large numbers of men and women in the 65 to 74 age groups.
- Highland gained an average of 119 persons aged 75 and over in each year on average.
- There are high rates of movement in the over 75 age group to and from all Areas, and particularly high rates of outward migration from Sutherland.
- Caithness, Sutherland, Ross & Cromarty and Skye & Lochalsh all share common features with a sharp peak of outward migration in the 15 to 19 age group, and inward migrants distributed throughout the 20 to 59 age range with a declining trend towards the later years.

Trends in Fertility, Mortality and Migration

Figure 3 shows how these factors varied between 1986 and 2006 for Highland as a whole, and how they are projected to change to 2031. The number of births per year exceeded deaths until



the mid 1990s when the position reversed. As a result of the recent increase in fertility, there will be a small gap between births and deaths until 2011 at which point deaths become dominant and the gap widens progressively until 2031. The population will begin to decline once net inward migration is insufficient to make up the deficit and this is expected to happen beyond the 2031 planning horizon.

The Impact of Migrant Workers

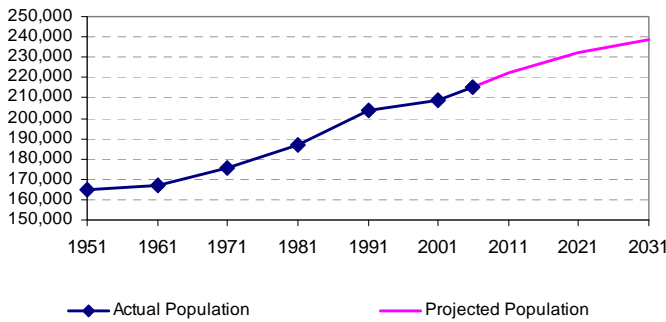
Briefing Note 15¹ shows that, between the 2001 census and March 2006, 5,505 people from overseas registered for National Insurance Numbers and gave a Highland address: 2,505 were from the Accession States. BN 15 estimates that between 3,000 and 3,500 of these remained in Highland or returned regularly. The Government's population estimates conform to international standards which assume that people entering for less than 12 months are not residents (and are migrants who are excluded from the estimates). As a result people from overseas have been estimated to account for only some 100 of our net annual inward migrants in recent years. A more realistic estimate of our population in mid 2006 - measured in terms of people contributing to our economy and using our Services - might be some 3,500 people higher than the base figure used here. Similarly, a more realistic estimate of the net inward migration since 2006 and in the early years of the projection would be significantly higher than the "official" figures used in the projection. The projection is therefore not dependent on Highland continuing to be an attractive destination for migrant workers from the Accession States, who are excluded from the figures by design

(1) <http://www.highland.gov.uk/yourcouncil/highlandfactsandfigures/publications/papersandbriefingnotes.htm>

Highland Headlines

Figure 4 shows that the population of Highland is projected to grow steadily from 2006 onwards, with the rate beginning to tail off with time as the gap between deaths and births widens approaching 2031. The final population for Highland summed from the Area components is 476 higher than the GROS Highland wide figure. The trends in the Area projections are consistent with those used by GROS but it has not been possible to replicate each component at a

Figure 4: Historic and Projected Population Change



local level and the difference between the two is well within the expected range of error. The overall rate of growth over the 25 years to 2031 is very similar to the historic rate between 1951 and 2006 and is summarised in Figure 5. Highland is one of 14 Local Authorities expected to see population growth with the highest rates in and around Edinburgh, and in Aberdeenshire.

Figure 5: Expected Population Change by Local Authority

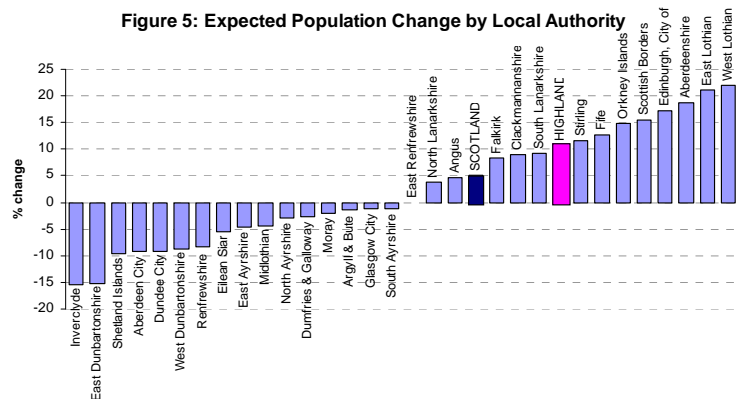
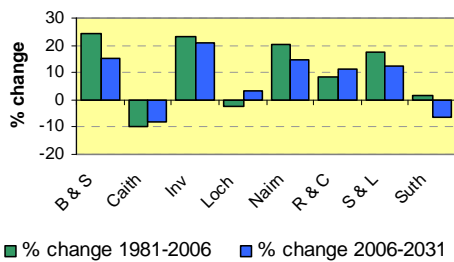


Figure 6: Expected Change in the Total Population

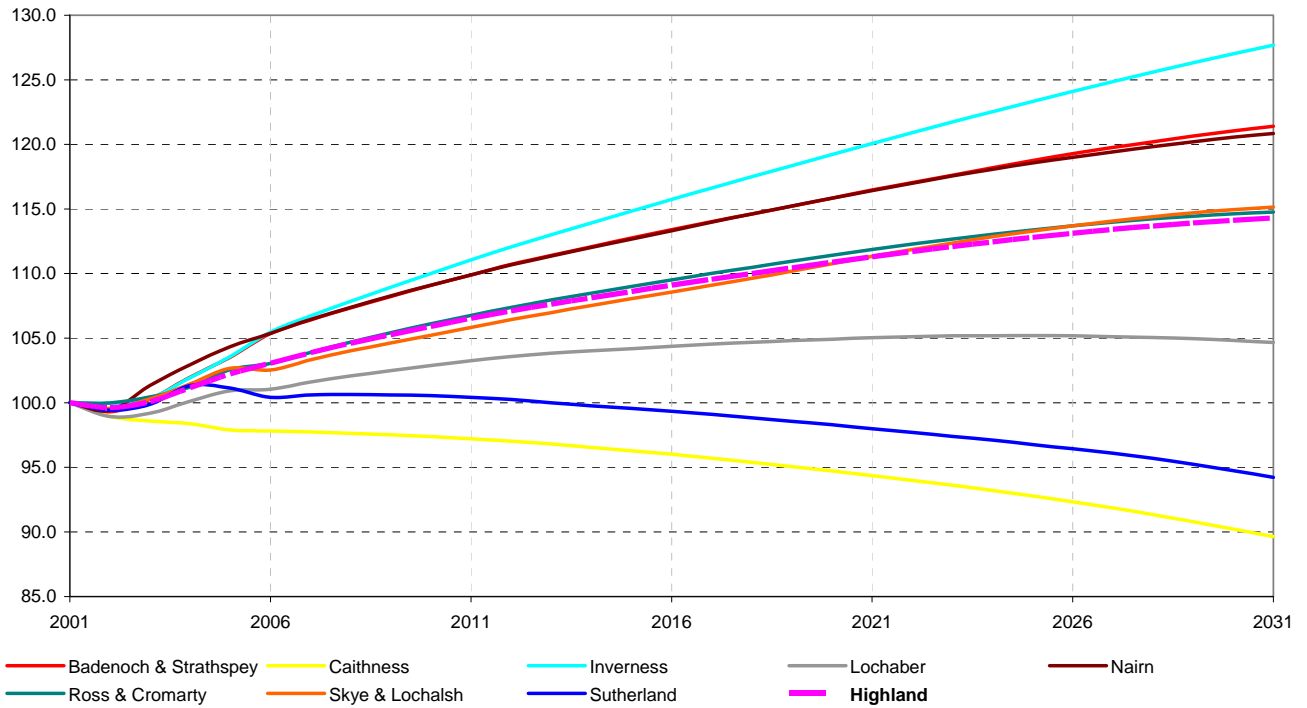


The highest rates of growth from 2006 onwards are expected in Inverness (21%), Nairn (15%) and Badenoch & Strathspey (15%) while decline is expected to continue in Caithness (-8%). Sutherland (-6%) is expected to replace Lochaber as the only other Area experiencing decline. Table 2 shows the population in 2006 and 2031 and the percentage of the population in the main age groups:

Table 2: Percentage of Population in Broad Age Groups, 2006 and 2031

	2006						2031					
	0 to 15	16 to 44	45 to 64	65 to 74	75+	All Ages	0 to 15	16 to 44	45 to 64	65 to 74	75+	All Ages
Badenoch & Strathspey	17.4	32.7	30.9	10.1	8.9	12,272	14.1	26.9	26.4	15.0	17.7	14,142
Caithness	18.8	34.8	28.0	10.7	7.7	24,994	14.4	27.6	25.3	15.8	16.9	22,907
Inverness	18.5	38.3	27.3	8.4	7.4	70,207	16.2	32.6	25.8	12.3	13.1	84,988
Lochaber	18.4	34.5	29.7	10.0	7.5	18,988	15.5	27.6	25.4	14.9	16.7	19,667
Nairn	18.0	32.8	29.3	10.8	9.1	11,998	13.0	25.3	26.9	16.6	18.3	13,760
Ross & Cromarty	18.7	33.3	30.5	9.7	7.9	50,862	14.9	27.4	25.3	14.7	17.6	56,646
Skye & Lochalsh	17.7	32.2	32.2	9.5	8.4	12,465	14.5	25.0	25.7	17.0	17.7	13,998
Sutherland	16.0	27.8	33.1	12.4	10.7	13,524	11.2	20.5	26.0	19.0	23.2	12,687
Highland	18.3	34.7	29.3	9.7	8.0	215,310	15.0	28.6	25.7	14.5	16.2	238,795

Figure 7: Population Change by Area 2001 to 2031 (2001 = 100)

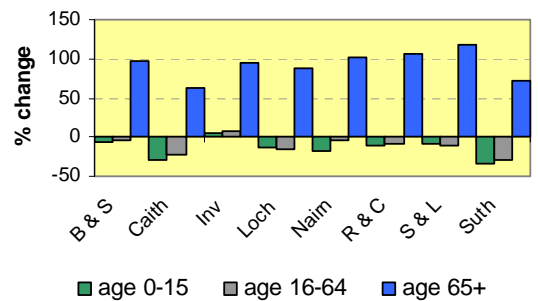


Age groups

Figure 8 shows how the three broad age groups are expected to change in the future, with a significant increase in the number of people of retirement age in all areas and reductions across the board in the two younger age groups apart from a modest increase in the number of working age people in Inverness. The dependency ratio in Highland (the number of working age people divided by the number of children and retired people they 'support') is expected to fall from 1.8 to 1.2 during the period indicating potential labour shortages and difficulties generating the financial resources to support the young and the old. The ratio was 1.6 in 1981 and the increase to 2006 was due to the fall in the number of children.

Further detail on the age groups is given in Appendix A.

Figure 8: Expected Population Change by Age Group



APPENDIX A: AGE GROUPS

Children aged 0 to 15

Despite a significant increase in the population of Highland between 1981 and 2006, a combination of the ageing population and declining fertility rates meant that the number of children in each Area fell. The most notable reductions were in Lochaber, Caithness, Sutherland and Ross & Cromarty. These historic trends are expected to continue and seven Areas will see continued falls. The most significant will be in Sutherland (-34%) and Caithness (-30%) with modest reductions in Badenoch & Strathspey (-7%) and Skye & Lochalsh (-8%). The one exception is expected to be Inverness, where an increased rate of inward migration together with a slightly younger age profile are expected result in a small increase in the number of children (6%).

Figure 9: Expected Change in the Number of Children Aged 0 to 15

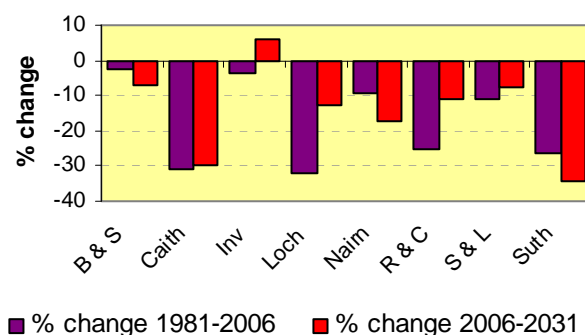
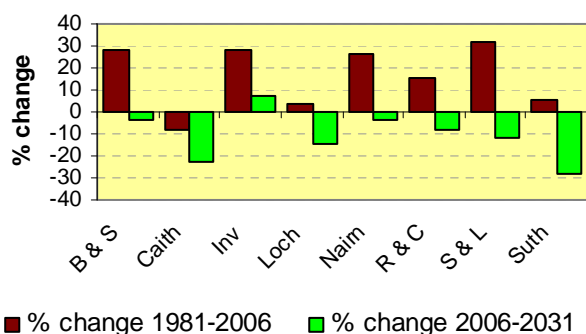


Figure 10: Expected Change in the Working Age Population Aged 16 to 64



Working age 16 to 64 The working age population is particularly influenced by the number of young people leaving Highland for further and higher education. Between 1981 and 2006 there were significant increases in the number of working age people in Skye & Lochalsh, Badenoch & Strathspey, Inverness and Nairn and only Caithness saw a reduction. Only Inverness (4%) is expected to see a continued increase to 2031, with significant falls in Sutherland (-28%), Caithness (-23%), and Lochaber (-15%).

Retired people aged 65+ The population of Highland is ageing in common with the rest of Scotland and Western Europe in general, and it is inevitable that the rate of increase in the number of retired people experienced between 1981 and 2006 will gather pace over the next 25 years. The greatest increases are expected to be in Skye & Lochalsh (118%), Ross & Cromarty (106%) and Nairn (101%), while Sutherland (71%) and Caithness (63%) should see the lowest increases. Sutherland already has the oldest population in Highland, hence the relatively low increase, while the figure for Caithness will be influenced by relatively high mortality rates in the Area.

Figure 11: Expected Change in the Number of Retired People Aged 65+

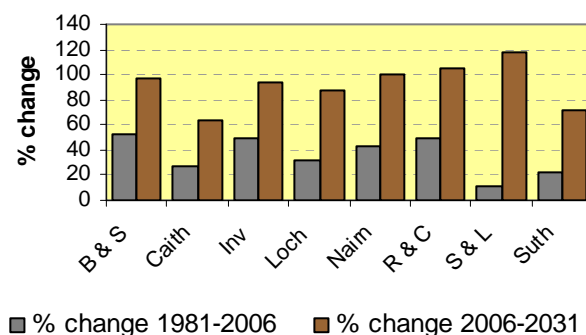
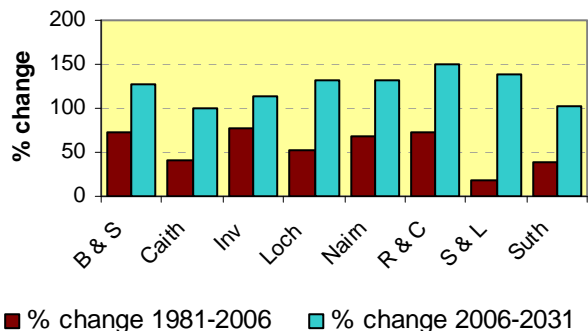


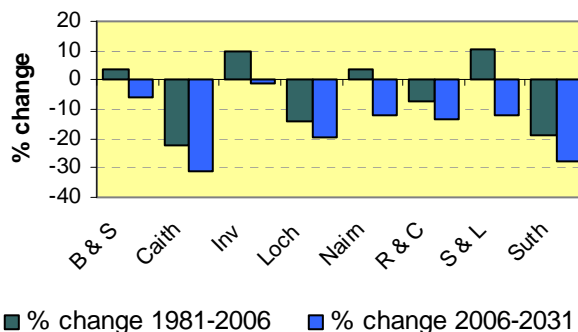
Figure 12: Expected Change in the Number of Elderly Aged 75+



Elderly people aged 75+ The care needs of older people increase significantly beyond 75 and an understanding of how their numbers might change is essential for service planning. There was a significant increase between 1981 and 2006 in the number of people in this age group in all Areas, and an increased rate of change is anticipated with the number in Highland more than doubling by 2031. The greatest increases will be in Ross & Cromarty (149%), Skye & Lochalsh (138%), Lochaber (131%), Nairn (131%) and Badenoch & Strathspey (128%) and the lowest in Caithness (101%) and Sutherland (103%).

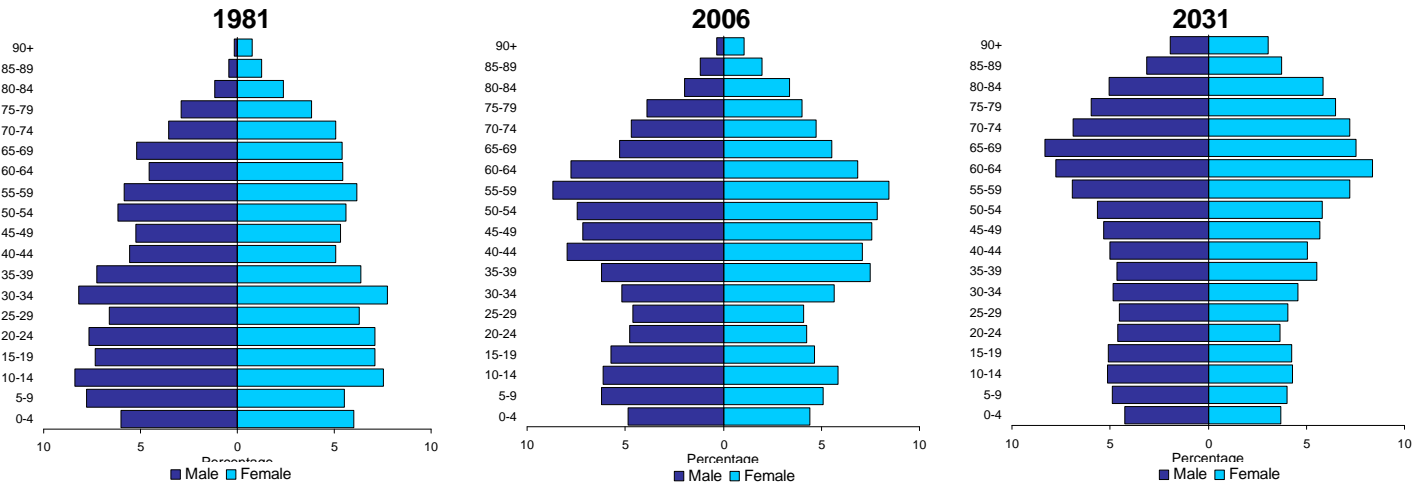
Women of childbearing age (15 to 44) The number of women who can have children gives a very clear signal about the viability of the native population. There has been a mixed picture over the last 25 years with modest increases in the number of women in this group in Badenoch & Strathspey, Inverness, Nairn and Skye & Lochalsh and decreases in Caithness, Lochaber, Ross & Cromarty and Sutherland. This pattern is closely correlated with the change in the number of children during the same period. All Areas will see a decrease in numbers by 2031 with modest reductions in Inverness (-1%) and Badenoch & Strathspey (-6%), and more substantial falls in Caithness (-31%), Sutherland (-28%) and Lochaber (-19%).

Figure 13: Expected Change in the Number of Women of Childbearing Age (15 to 44)



APPENDIX B: PEN PICTURES FOR AREAS

BADENOCH & STRATHSPEY

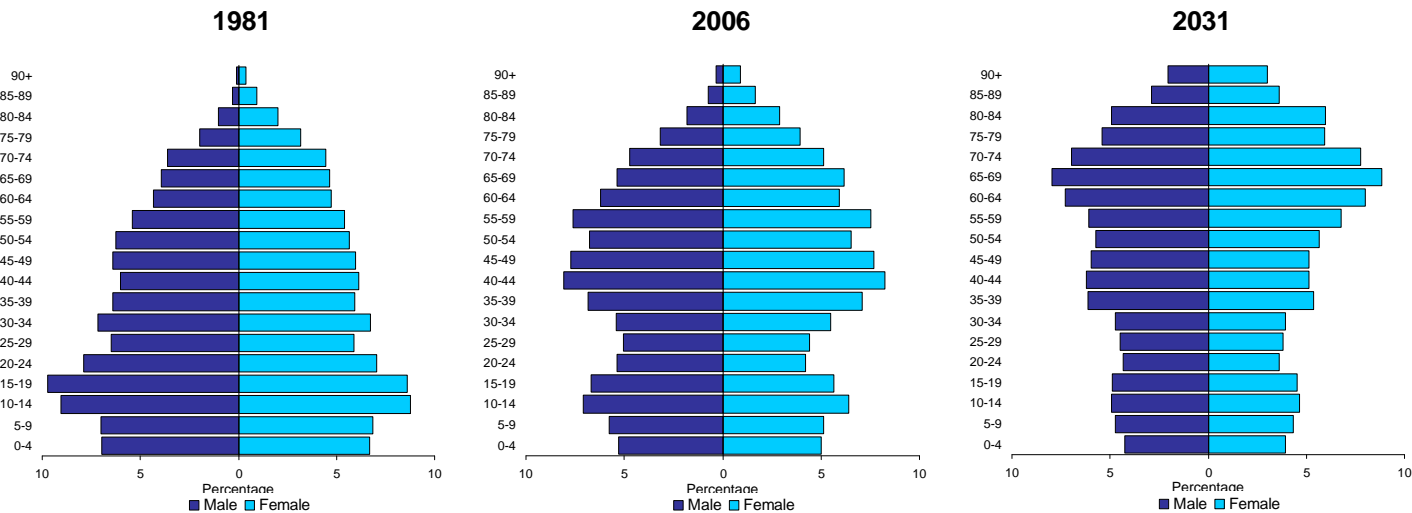


Badenoch & Strathspey is expected to continue to be one of our fastest growing Areas with a population increase of 1,870 (15.2%) by 2031 leading to a population which will be only slightly “older” than the Highland average. The number of deaths per year is currently slightly greater than the number of births and the population growth will be the result of the rate of net inward migration, which also has a relatively young age profile and will help sustain the number of births per year. The population is expected to remain one of the more balanced in Highland with relatively

Badenoch	2006		2031		Change
Age Group	Number	%	Number	%	%
0 to 4	569	4.6	559	4.0	-1.8
5 to 15	1,566	12.8	1,429	10.1	-8.7
16 to 24	1,047	8.5	1,106	7.8	5.6
25 to 44	2,960	24.1	2,704	19.1	-8.6
45 to 64	3,792	30.9	3,731	26.4	-1.6
65 to 74	1,242	10.1	2,116	15.0	70.4
75+	1,096	8.9	2,497	17.7	127.8
Total	12,272	100.0	14,142	100.0	15.2
Long term net migration (2012 on) +110 people per year					

modest reductions in the numbers of children and the working age population. There will be a 70% increase in the number of retired people, and a 128% increase in the number of elderly aged 75 plus, giving a proportion of older people slightly above the Highland average.

CAITHNESS



Caithness currently has the highest proportion of children in Highland, but it is also the only Highland Area expected to see a net loss of people through migration. The combination of net outward migration and the current excess of deaths over births, increasing through time, is expected to result in the largest population fall of all Highland Areas with a loss of 2,087 people (-8.4%) by 2031. There will be reductions in the numbers of people in all age groups up to retirement age, with the number of children falling to below the Highland average. The working age population is also expected to

Caithness	2006		2031		Change
Age Group	Number	%	Number	%	%
0 to 4	1,284	5.1	938	4.1	-26.9
5 to 15	3,423	13.7	2,359	10.3	-31.1
16 to 24	2,363	9.5	1,759	7.7	-25.6
25 to 44	6,325	25.3	4,560	19.9	-27.9
45 to 64	7,002	28.0	5,805	25.3	-17.1
65 to 74	2,672	10.7	3,615	15.8	35.3
75+	1,925	7.7	3,871	16.9	101.1
Total	24,994	100.0	22,907	100.0	-8.4
Long term net migration (2012 on) -20 people per year					

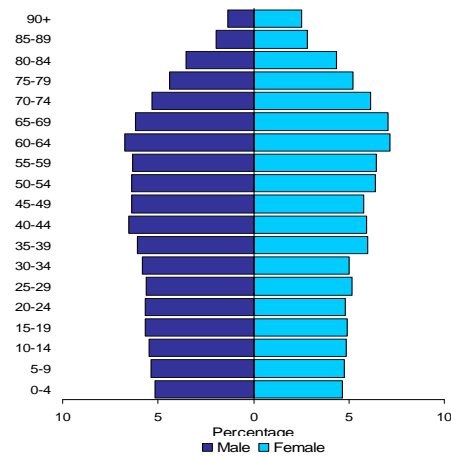
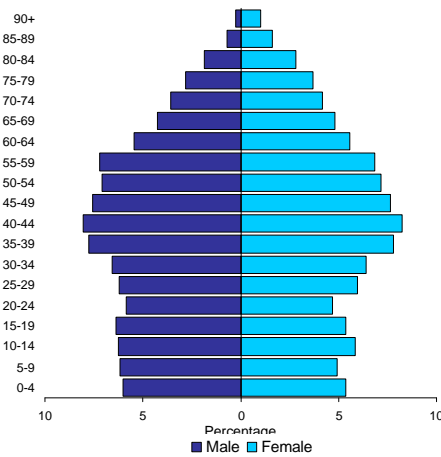
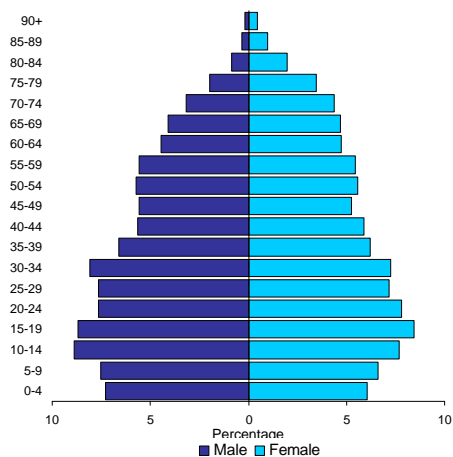
fall by 23%, the second highest rate of fall of all Highland Areas. The increases in the number of retired people (63%) and elderly aged over 65 (101%) will be the lowest in Highland. Figures from the GROS annual Small Area Population Estimates show that a significant factor in the net outward migration of people from Caithness is the loss of people from parts of Thurso and Wick, particularly in the 15 to 44 age groups. Current regeneration initiatives in Caithness aim to impact on these patterns in both the short and long term.

INVERNESS

1981

2006

2031



Inverness is the Area with the most balanced current population. It is also expected to experience high net rates of inward migration with young people less likely to move away, and more likely to move in, than the other Highland Areas. The net result is expected to be that the number of births each year will be greater than the number of deaths until 2028, and that the population will grow by 14,781 people (21.1%) by 2031. At this time the population will again be the most balanced, and naturally sustainable, of all the Highland Areas. It is expected to be the only Area with an

increase in both the number of children (4.5%) and the working age population (7.7%) and in 2031 the percentage of both retired people (25.4%) and the elderly aged 75 and over (13.1%) will be significantly lower than the Highland average (30.7% and 16.2% respectively).

Inverness	2006		2031		Change
Age Group	Number	%	Number	%	%
0 to 4	3,990	5.7	4,171	4.9	4.5
5 to 15	9,026	12.9	9,598	11.3	6.3
16 to 24	6,914	9.8	8,056	9.5	16.5
25 to 44	20,007	28.5	19,630	23.1	-1.9
45 to 64	19,140	27.3	21,904	25.8	14.4
65 to 74	5,905	8.4	10,495	12.3	77.7
75+	5,225	7.4	11,134	13.1	113.1
Total	70,207	100.0	84,988	100.0	21.1

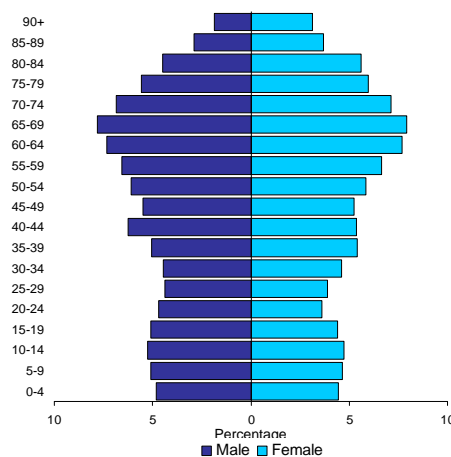
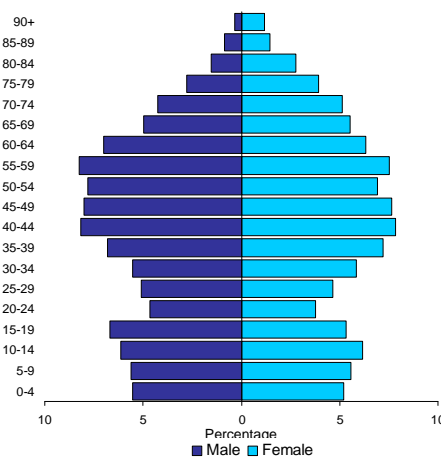
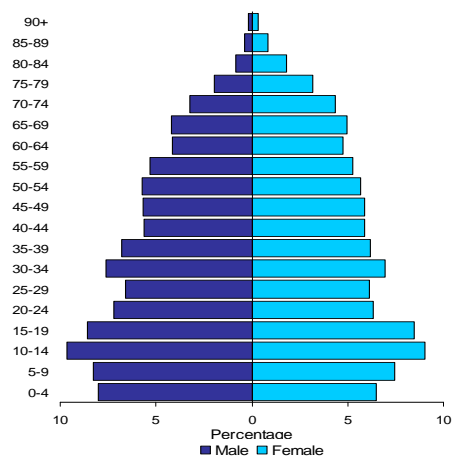
Long term net migration (2012 on) +490 people per year

LOCHABER

1981

2006

2031



Lochaber was one of two Highland Areas to experience population decline between 1981 and 2006 (-2.6%) but the current age profile is similar to the Highland average and the number of births each year is expected to be greater than the number of deaths until 2014. The rate of net inward migration is expected to be modest overall but Lochaber benefits from losing relatively low numbers of young men and women, and also attracts inward migrants with a fairly young profile, with the result that the population is expected to increase by 679 (+3.6%) in 2031, with a peak population

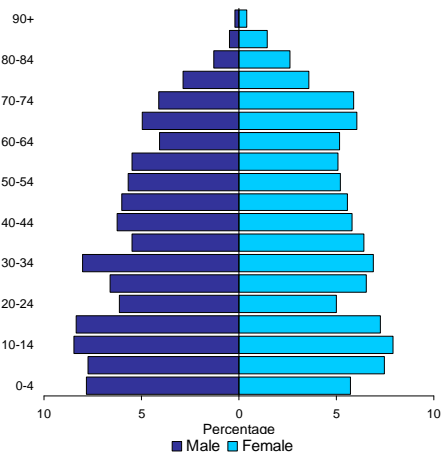
of 19,768 (+780, +4.1%) in 2025. The number of people in each of the pre-retirement age groups is expected to fall with a significant reduction of -14.5% in the working age population and -12.7% in the number of children. The increase of 131% in the number of elderly is one of the highest in Highland, but the percentage in 2031 will be only slightly higher than the Highland average.

Lochaber	2006		2031		Change
Age Group	Number	%	Number	%	%
0 to 4	1,021	5.4	910	4.6	-10.9
5 to 15	2,470	13.0	2,137	10.9	-13.5
16 to 24	1,695	8.9	1,548	7.9	-8.7
25 to 44	4,855	25.6	3,871	19.7	-20.3
45 to 64	5,641	29.7	5,002	25.4	-11.3
65 to 74	1,890	10.0	2,924	14.9	54.7
75+	1,416	7.5	3,275	16.7	131.3
Total	18,988	100.0	19,667	100.0	3.6

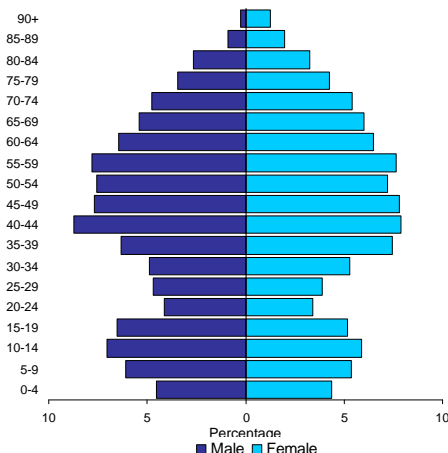
Long term net migration (2012 on) +40 people per year

NAIRN

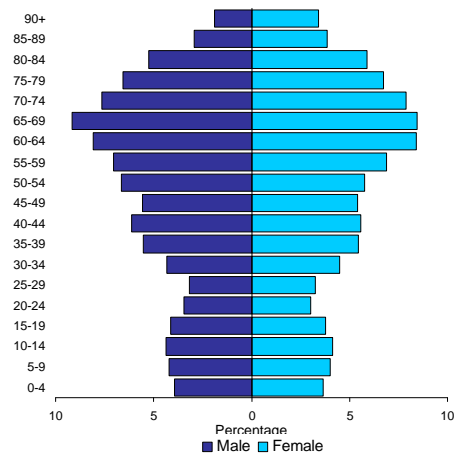
1981



2006



2031



Nairn has an unusual migration profile in comparison with the other Highland Areas losing relatively low numbers of young people to outward migration, and with migrants moving in later in life from the mid 30s onwards, particularly the 60 to 75 age group. By inference, those in their 30s and early 40s seem to have fairly small families. The population is currently one of the "oldest" in Highland and the number of deaths per year is greater than the number of births but despite this the relatively high rate of inward migration means that the population is expected to grow by 1,762

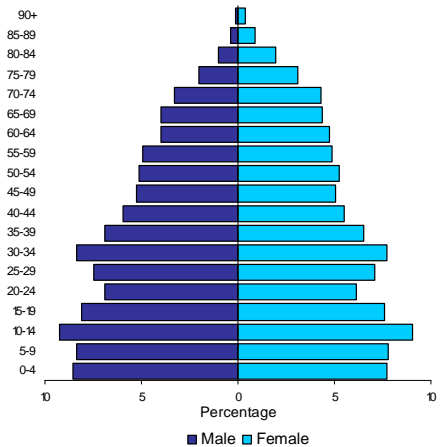
(14.7%), the third highest growth rate in Highland (similar to Badenoch & Strathspey). The numbers of people in each of the age bands up to 44 are expected to fall, with a slight increase in the number of people of later working age, 45 to 64. The percentages of both retired people and the elderly aged 75 and over will be the second highest in Highland in 2031.

Nairn Age Group	2006		2031		Change %
	Number	%	Number	%	
0 to 4	533	4.4	521	3.8	-2.3
5 to 15	1,625	13.5	1,266	9.2	-22.1
16 to 24	986	8.2	867	6.3	-12.1
25 to 44	2,946	24.6	2,608	19.0	-11.5
45 to 64	3,519	29.3	3,699	26.9	5.1
65 to 74	1,300	10.8	2,282	16.6	75.5
75+	1,089	9.1	2,517	18.3	131.1
Total	11,998	100.0	13,760	100.0	14.7

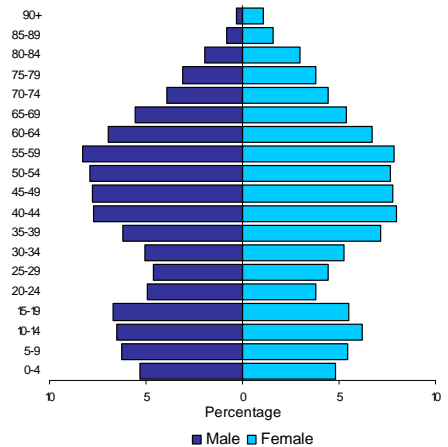
Long term net migration (2012 on) +120 people per year

ROSS & CROMARTY

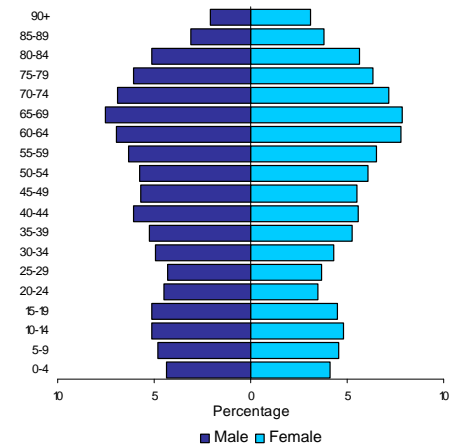
1981



2006



2031



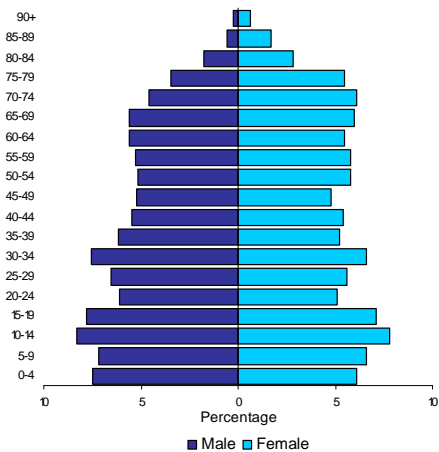
Ross & Cromarty had the most balanced population in 1981 (with a population graph close to the classic pyramid shape) but has the highest rate of outward migration of young people, and people moving in tend to be in the older age groups. Births and deaths are roughly in balance at the moment but deaths are expected to quickly become dominant. The high rate of net inward migration is expected to result in a population increase of 5,784 people (11.4%), similar to the average for Highland overall). Reductions are expected in the number of people in all of the age groups up to retirement age. The percentage increase in the number of people of retirement age is expected to be the second highest in Highland (105.6%) and the increase in the elderly aged 65 and above the highest in Highland (149.4%). This is the result of the relatively young age profile in 2006, and the overall percentage of older people will be unexceptional, just above the Highland average in 2031.

Ross & Cromarty Age Group	2006		2031		Change %
	Number	%	Number	%	
0 to 4	2,579	5.1	2,394	4.2	-7.2
5 to 15	6,935	13.6	6,055	10.7	-12.7
16 to 24	4,612	9.1	4,389	7.7	-4.8
25 to 44	12,316	24.2	11,141	19.7	-9.5
45 to 64	15,503	30.5	14,338	25.3	-7.5
65 to 74	4,911	9.7	8,337	14.7	69.8
75+	4,006	7.9	9,992	17.6	149.4
Total	50,862	100.0	56,646	100.0	11.4

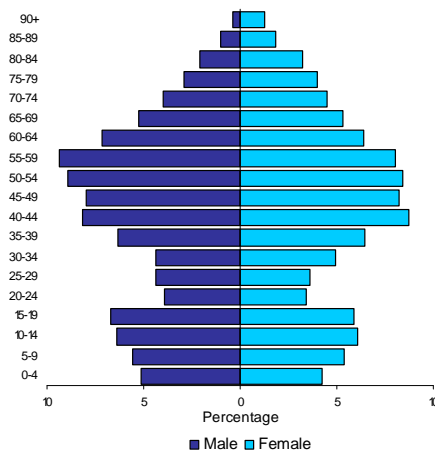
Long term net migration (2012 on) +300 people per year

SKYE & LOCHALSH

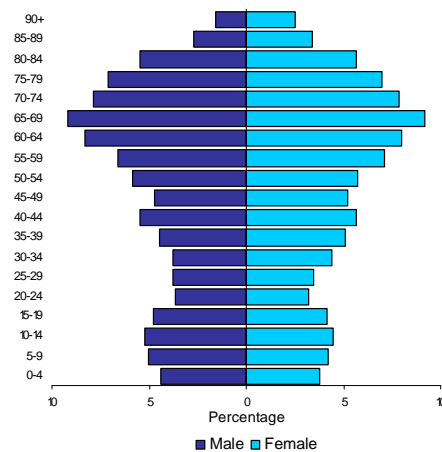
1981



2006



2031



Significant numbers of young people in the 15 to 19 age group leave Skye & Lochalsh each year, and inward migrants tend to have an older age profile with similar numbers in each age group from 20 to 59 (but with a peak of young women aged 20 to 24 returning to the Area). The relatively high rate of net inward migration is more than enough to compensate for the current excess of deaths over births each year and the rate of growth for Skye & Lochalsh is expected to be similar to that for Highland overall, with an increase of 1,533 people (12.3%) by 2031. A relatively

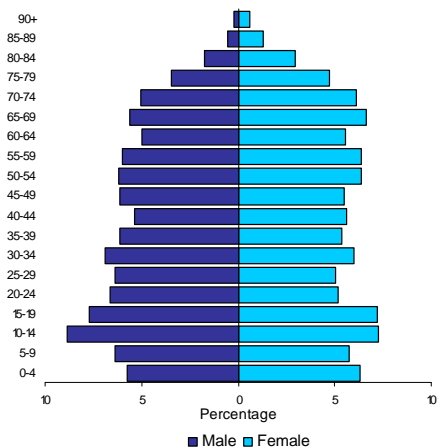
consistent reduction is expected in the number of people in each age group up to retirement age, but with a relatively small fall in number of pre-school children. The increase in the number of people of retirement age is expected to be the highest in Highland (118%), and the increase in the number of the elderly aged 75 and over the second highest in Highland (138%): in 2031 only Sutherland and Nairn will have an "older" population.

Skye & Lochalsh	2006		2031		Change
Age Group	Number	%	Number	%	%
0 to 4	581	4.7	573	4.1	-1.4
5 to 15	1,623	13.0	1,460	10.4	-10.0
16 to 24	1,079	8.7	966	6.9	-10.5
25 to 44	2,934	23.5	2,532	18.1	-13.7
45 to 64	4,016	32.2	3,602	25.7	-10.3
65 to 74	1,188	9.5	2,383	17.0	100.6
75+	1,044	8.4	2,482	17.7	137.7
Total	12,465	100.0	13,998	100.0	12.3

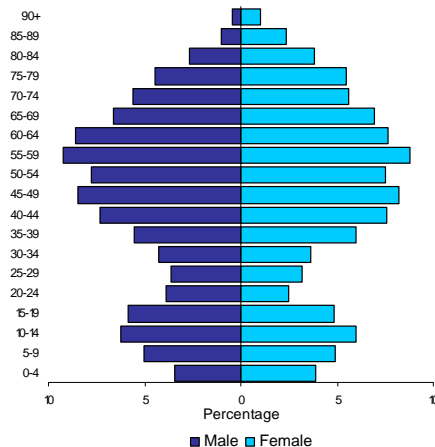
Long term net migration (2012 on) +90 people per year

SUTHERLAND

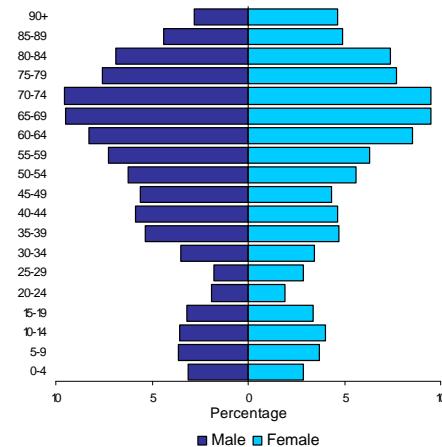
1981



2006



2031



The population of Sutherland is expected to fall from 2008 onwards with a population in 2031 which is 831 lower than in 2006 (-6.2%). It has the most dramatically ageing population of all Highland Areas and is expected to have a significantly lower proportions of both children and the 16 to 44 age group than any other Highland Area. A combination of low numbers of women of child-bearing age plus the elderly age profile of inward migrants has led to a historic fall in the number of young people and this is expected to continue into the future with a reduction in the number of people

in each age group up to retirement age. The number of people aged 65 to 74 is expected to increase by almost a half while the number of people aged 75 and over will double, and in 2031 almost a quarter of the population will be in this elderly age group. The imbalance between working age people and the elderly they will support is likely to provide challenges to our provision of the personal and health care that they will need.

Sutherland	2006		2031		Change
Age Group	Number	%	Number	%	%
0 to 4	497	3.7	380	3.0	-23.5
5 to 15	1,670	12.3	1,042	8.2	-37.6
16 to 24	982	7.3	566	4.5	-42.4
25 to 44	2,774	20.5	2,037	16.1	-26.6
45 to 64	4,473	33.1	3,300	26.0	-26.2
65 to 74	1,678	12.4	2,416	19.0	44.0
75+	1,450	10.7	2,946	23.2	103.2
Total	13,524	100.0	12,687	100.0	-6.2

Long term net migration (2012 on) +70 people per year