ECONOMY AND LABOUR MARKET

Scotland's Labour Market Trends

March 2025

This publication contains:

- experimental monthly estimates of the number of payrolled employees and their median earnings and cover the period February 2025. Data are sourced from the HMRC's Pay As You Earn (PAYE) system where people are recorded through the Real Time Information (RTI) system
- experimental Claimant Count estimates which cover the period February 2025
- the ONS Labour Force Survey (LFS) estimates of employment, unemployment and economic inactivity. Estimates cover the period to November 2024 to January 2025

The statistics included in this release are official statistics in development. Official statistics in development may be new or existing statistics, and will be tested with users, in line with the standards of trustworthiness, quality, and value in the Code of Practice for Statistics.

Scottish Government
Riaghaltas na h-Alba

Key Points

- early seasonally adjusted estimates for February 2025 from HMRC Pay As You Earn Real Time Information indicate that there were 2.46 million payrolled employees in Scotland, a decrease of -0.1 per cent (-3,000) compared with February 2024. This compares with the UK where the number of payrolled employees had an increase of 0.2% over the same period
- early seasonally adjusted estimates for February 2025 from HMRC Pay As You Earn Real Time Information indicate that median monthly pay for payrolled employees in Scotland was £2,466, an increase of 4.8 per cent compared with February 2024. This is lower than the growth in median monthly pay for the UK over the same period (5.0 per cent). Changes over time are based on median monthly pay estimates rounded to the nearest pound
- In February 2025, the claimant count in Scotland was 111,200, an increase of 1,700 (1.5 per cent) over the month and an increase of 5,600 (5.3 per cent) over the year. The claimant count unemployment rate in February 2025 was 3.8 per cent, compared with 4.7 per cent for the UK as a whole

Due to increased volatility of the ONS Labour Force Survey estimates resulting from smaller achieved sample sizes, estimates of change should be treated with additional caution and ONS recommend using them as part of their suite of labour market indicators alongside Pay As You Earn Real Time Information estimates and claimant count data.

Estimates sourced from the ONS Labour Force Survey are presented for November 2024 to January 2025, compared with the quarter before (August to October 2024). Please note percentage point changes are based on unrounded data.

- the estimates for November 2024 to January 2025 indicate that over the quarter, the economic inactivity rate decreased while the employment and unemployment rates increased
- the estimated unemployment rate (16 and over) in Scotland was 3.7 per cent, up 0.1 percentage points over the quarter. Scotland's unemployment rate was below the UK rate of 4.4 per cent
- the estimated employment rate (the proportion of people aged 16 to 64 in work) in Scotland was 74.1 per cent, up 0.9 percentage points over the quarter. Scotland's employment rate was below the UK rate of 75.0 per cent
- the estimated economic inactivity rate (the proportion of people aged 16 to 64 years who were not working and not seeking or available to work) in Scotland was 22.9 per cent, down 1.0 percentage point over the quarter. Scotland's economic inactivity rate was above the UK rate of 21.5 per cent

Contents

Key Points **2**
About this publication **4**
An Official Statistics in Development Publication for Scotland 4
Source of data 4
Comparison over time 5
ONS Labour Force Survey 5
Previous revisions 5
Other sources 6
1. HMRC payrolled employees (experimental) **7**
2. HMRC earnings (experimental) **10**
3. Claimant Count **12**
4. Summary of labour market statistics **14**
Infographic summary of ONS Labour Force Survey Statistics **15**
5. Employment estimates **16**
6. Unemployment estimates **18**
7. Economic Inactivity estimates **20**
8. Labour market estimates for women and men **22**
9. Glossary **23**
10. Data and Methodology **25**
Labour Force Survey 25
Revisions 25
Labour Market Transformation 26
HMRC RTI 26
Claimant Count 26
Where can labour market data for Scotland be accessed 27
Scottish Government Labour Market Statistics 27
11. Tell us what you think **28**
Join our mailing list 28
Future publications 28
Crown Copyright 28
Next update 28

About this publication

This publication contains the Labour Force Survey (LFS) estimates of employment, unemployment and economic inactivity for Scotland and the UK by the Office for National Statistics (ONS). The publication also includes the experimental HMRC Pay As You Earn (PAYE) Real-Time Information (RTI) and ONS Claimant Count statistics.

An Official Statistics in Development Publication for Scotland

These statistics are official statistics in development. Official statistics in development may be new or existing statistics, and will be tested with users, in line with the standards of trustworthiness, quality, and value in the Code of Practice for Statistics.

ONS published an article on 3 December 2024 which mentions the impact of reweighting the Labour Force Survey on the key indicators for the UK.

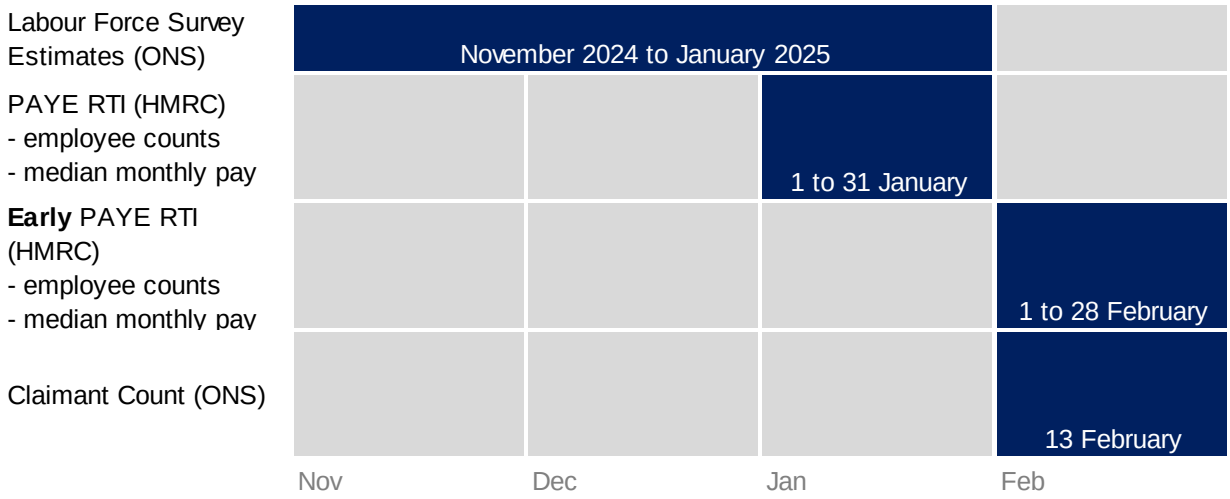
HMRC and ONS have also published a response to the OSR RTI review.

Scottish Government statistics are regulated by the Office for Statistics Regulation (OSR). OSR sets the standards of trustworthiness, quality and value in the Code of Practice for Statistics that all producers of official statistics should adhere to.

Source of data

The information included in this publication are from three separate sources covering the time periods shown in Figure 1.

Figure 1: Labour market data source reference periods



Comparison over time

Comparisons with the latest data over the year have been included within the commentary of this publication. Estimates for employment, unemployment and inactivity rates are compared over the quarter and over the year.

ONS Labour Force Survey

Revision

Within this publication, ONS Labour Force Survey seasonally adjusted data has been revised back to January to March 2019 due to a seasonal adjustment review.

Previous revisions

ONS reweighted Labour Force Survey (LFS) estimates in December 2024. These are official statistics in development. On 3 December 2024, ONS published an article outlining how the estimates have been affected by reweighting. These estimates were included in the main ONS release on 17 December 2024.

The reweighted LFS estimates incorporate information on the size and composition of the UK population, based on 2022 mid-year estimates. For England, Wales and Northern Ireland, they are projected forward using scaling factors from 2021-based National Population projections, published in January 2024. For Scotland, they are projected forward using scaling factors from 2020-based National Population Projections, published in January 2023.

Given time constraints, ONS have only been able to reweight LFS estimates from January to March 2019 onwards. Therefore, the reweighting exercise creates a discontinuity between December 2018 to February 2019 and January to March 2019 where there will be a step change in LFS estimates. However, the seasonally adjusted UK levels of employment, unemployment and economic inactivity by sex and age-band have been modelled back to June to August 2011 to ensure that headline rates and levels by sex and age-band (datasets A02SA and A05SA) can be assessed without a discontinuity.

Reweighting takes account of more recent population estimates but does not address issues surrounding the increased volatility in the LFS data, resulting from smaller achieved sample sizes. An increased amount of volatility will remain until the recent improvements that have been implemented to increase response levels and the size of datasets fully feed through the survey. Therefore ONS continue to advise caution when interpreting changes in headline rates and recommend using them as part of their suite of labour market indicators, alongside Claimant Count and Pay As You Earn Real Time Information (PAYE RTI) estimates.

The longer-term solution remains the replacement of the Labour Force Survey with the Transformed Labour Force Survey (TLFS). ONS have published a Labour market transformation article providing an update on the transformation of labour market statistics.

Other sources

This publication also contains HMRC PAYE Real Time Information (RTI) on payrolled employees and their median monthly earnings. These are classed as Official Statistics in Development.

The ONS have also published experimental Claimant Count estimates which have also been included within this publication.

This release follows the ONS monthly releases of:

- Labour market overview, UK Statistical bulletins
- Earnings and employment from Pay As You Earn Real Time Information, UK
- CC01 Regional labour market: Claimant Count by unitary and local authority (experimental)

1. HMRC payrolled employees (experimental)

This information is based on experimental monthly estimates of paid employees and their pay from HM Revenue and Customs' (HMRC's) Pay As You Earn (PAYE) Real Time Information (RTI) data.

The latest early payrolled employee estimates for February 2025 indicate that there were 2.46 million payrolled employees in Scotland. Compared with the same month the year before, the number of payrolled employees decreased by -0.1 per cent (-3,000). This compares with an increase of 0.2% for the UK over the same period.

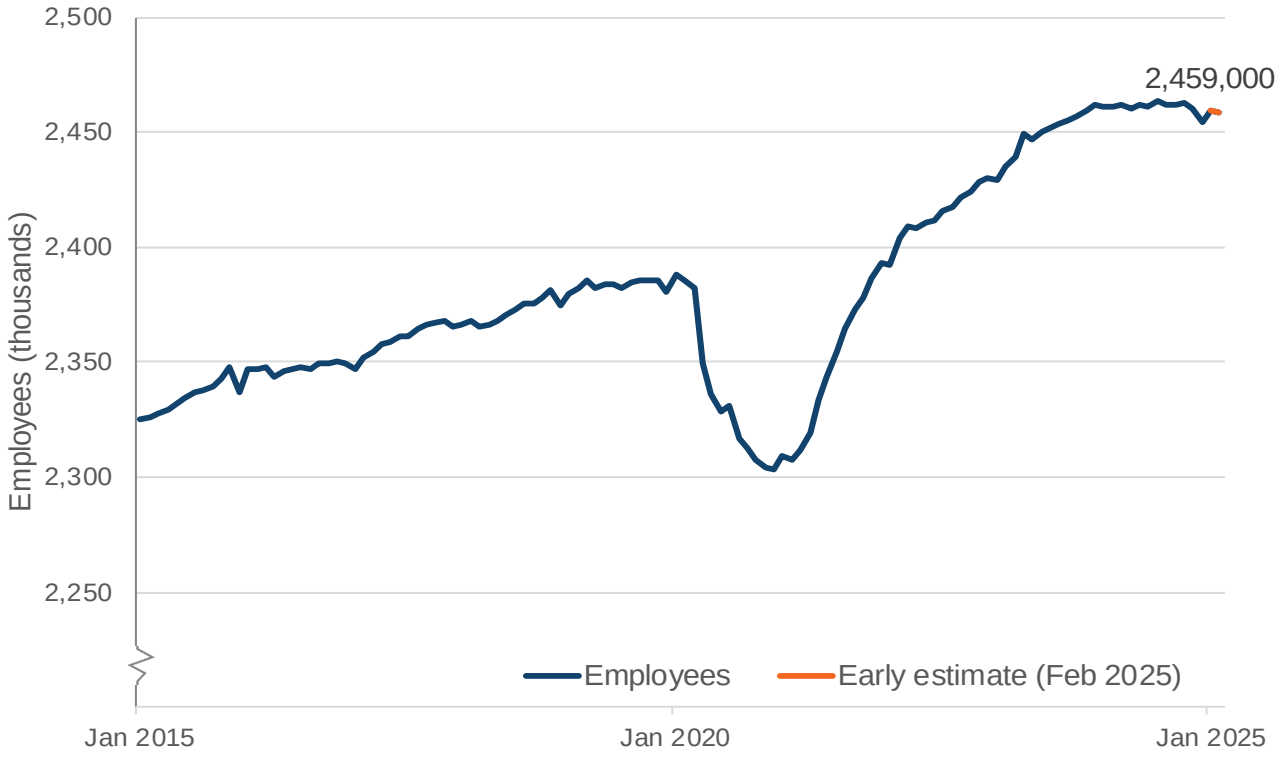
The estimated number of payrolled employees was similar in January 2025 and February 2025. This monthly change should be treated as a provisional estimate and is likely to be revised when more data for February is received next month.

In December 2020, the lowest point following the start of the pandemic, there were 83,000 fewer payrolled employees in Scotland than prior to the pandemic (February 2020). However, the estimated number of payrolled employees has generally been increasing since December 2020 and has continued to be above the pre-coronavirus level (February 2020) since November 2021.

Estimates for February 2025 are provisional as they are based on around 85% of information being available. When comparing the number of payrolled employees in January 2025 with the same period the previous year, the number of payrolled employees in Scotland decreased by -0.1 per cent (-2,000).

Chart 1: Number of payrolled employees in Scotland declined between February and December 2020. However, it has continued to be above the pre-coronavirus level since November 2021, reaching a peak in July 2024. The number of payrolled employees remained relatively unchanged during 2024

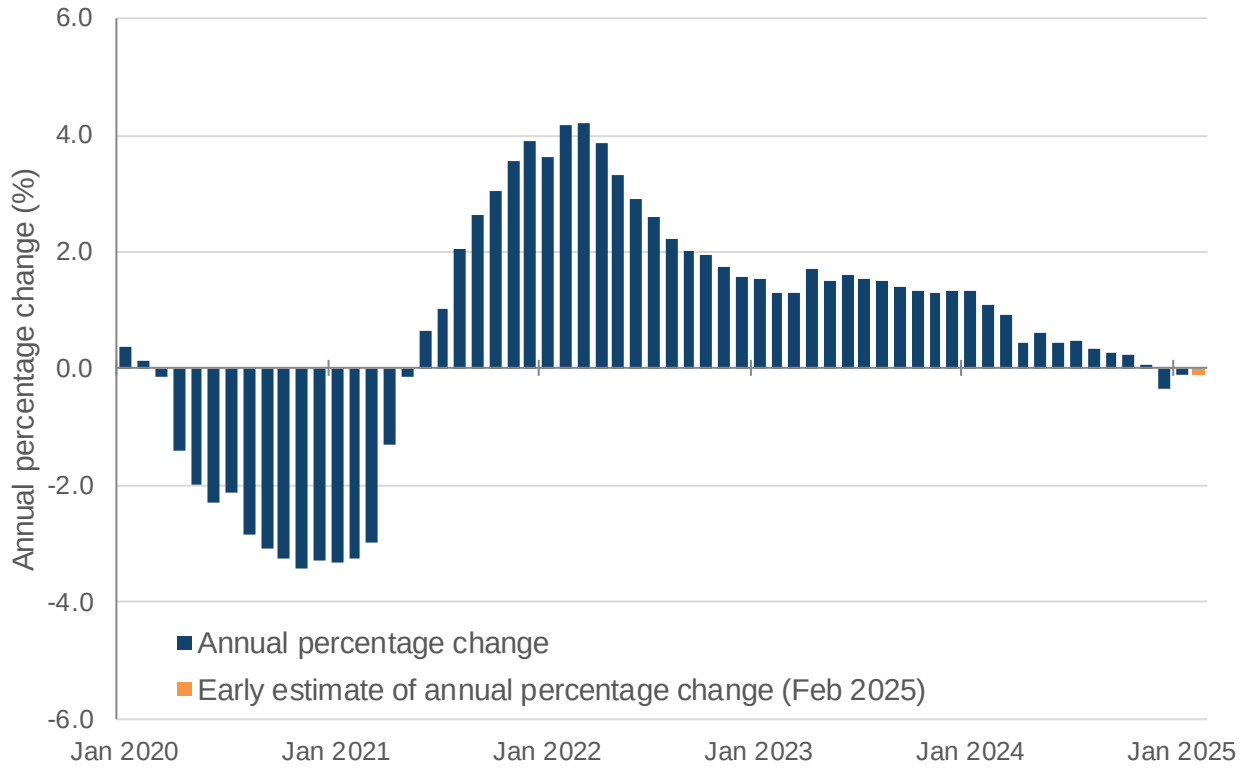
Payrolled Employees, Scotland, January 2015 to February 2025, seasonally adjusted



Source: PAYE RTI, all industries, seasonally adjusted, HMRC
Note: Early estimates for February 2025 are provided to give an indication of the likely level of payrolled employees as well as their median pay in the latest period. The figures are based on around 85% of information being available. They are considered of lower quality and may be subject to revision in next month's release when between 98% to 99% of data will be available.

Chart 2: The annual change in the number of payrolled employees in Scotland reached a peak in March 2022 but has fallen over 2024 with a similar rate of annual change in the last few months

Annual Percentage Change in Payrolled Employees, Scotland, January 2020 to February 2025



Source: PAYE RTI, all industries, seasonally adjusted, HMRC
Note: Early estimates for February 2025 are provided to give an indication of the likely level of payrolled employees as well as their median pay in the latest period. The figures are based on around 85% of information being available. They are considered of lower quality and may be subject to revision in next month's release when between 98% to 99% of data will be available.

2. HMRC earnings (experimental)

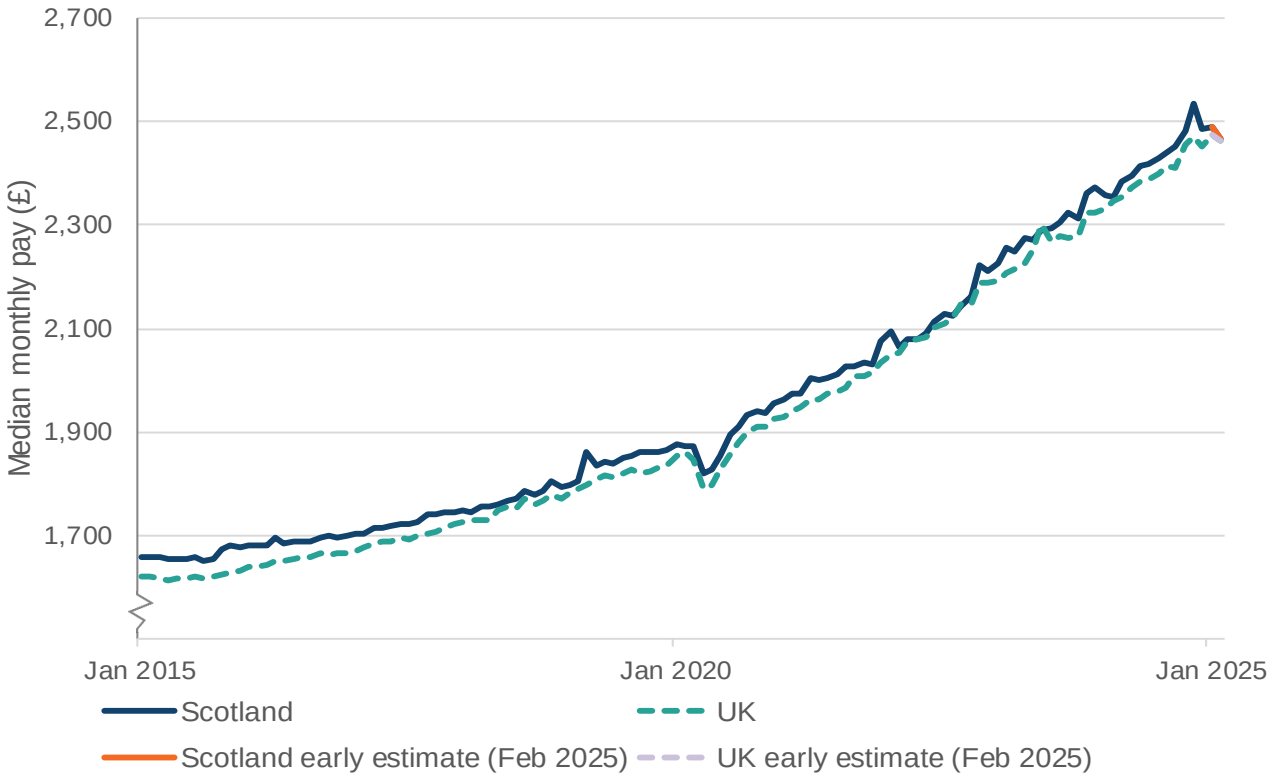
This information is based on experimental monthly estimates of paid employees and their pay from HM Revenue and Customs' (HMRC's) Pay As You Earn (PAYE) Real Time Information (RTI) data.

Changes over time are based on median monthly pay estimates which are rounded to the nearest pound.

The latest early estimates for February 2025 indicate that median monthly pay for payrolled employees in Scotland was £2,466, an increase of 4.8 per cent compared to the same period the previous year. This is lower than the annual growth in median monthly pay for payrolled employees in the UK over the same period (5.0 per cent).

Chart 3: Median pay for payrolled employees decreased sharply in April 2020 but has generally been increasing since July 2020

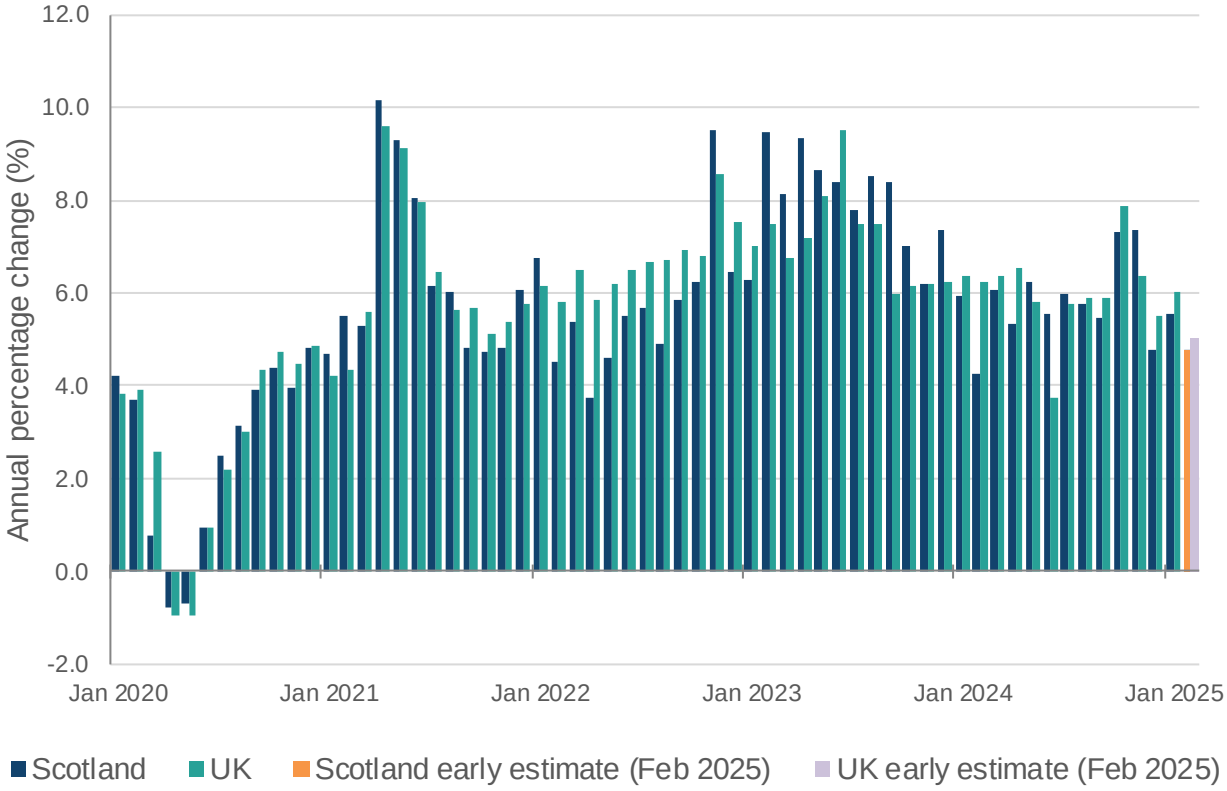
Median Monthly Pay, Scotland and UK, January 2015 to February 2025, seasonally adjusted



Source: PAYE RTI, all industries, seasonally adjusted, HMRC
Notes: Early estimates for February 2025 are provided to give an indication of the likely level of payrolled employees as well as their median pay in the latest period. The figures for February 2025 are based on around 85% of information being available. They are considered of lower quality and may be subject to revision in next month's release when between 98% to 99% of data will be available.

Chart 4: Annual Growth in the median monthly pay for payrolled employees in Scotland is higher than the average growth prior to the pandemic

Annual Percentage Change in Median Monthly Pay, Scotland and UK, January 2020 to February 2025



Source: PAYE RTI, all industries, seasonally adjusted, HMRC
Notes: Early estimates for February 2025 are provided to give an indication of the likely level of payrolled employees as well as their median pay in the latest period. The figures for February 2025 are based on around 85% of information being available. They are considered of lower quality and may be subject to revision in next month's release when between 98% to 99% of data will be available.

3. Claimant Count

This information is based on experimental monthly estimates of the number of people claiming unemployment-related benefits.

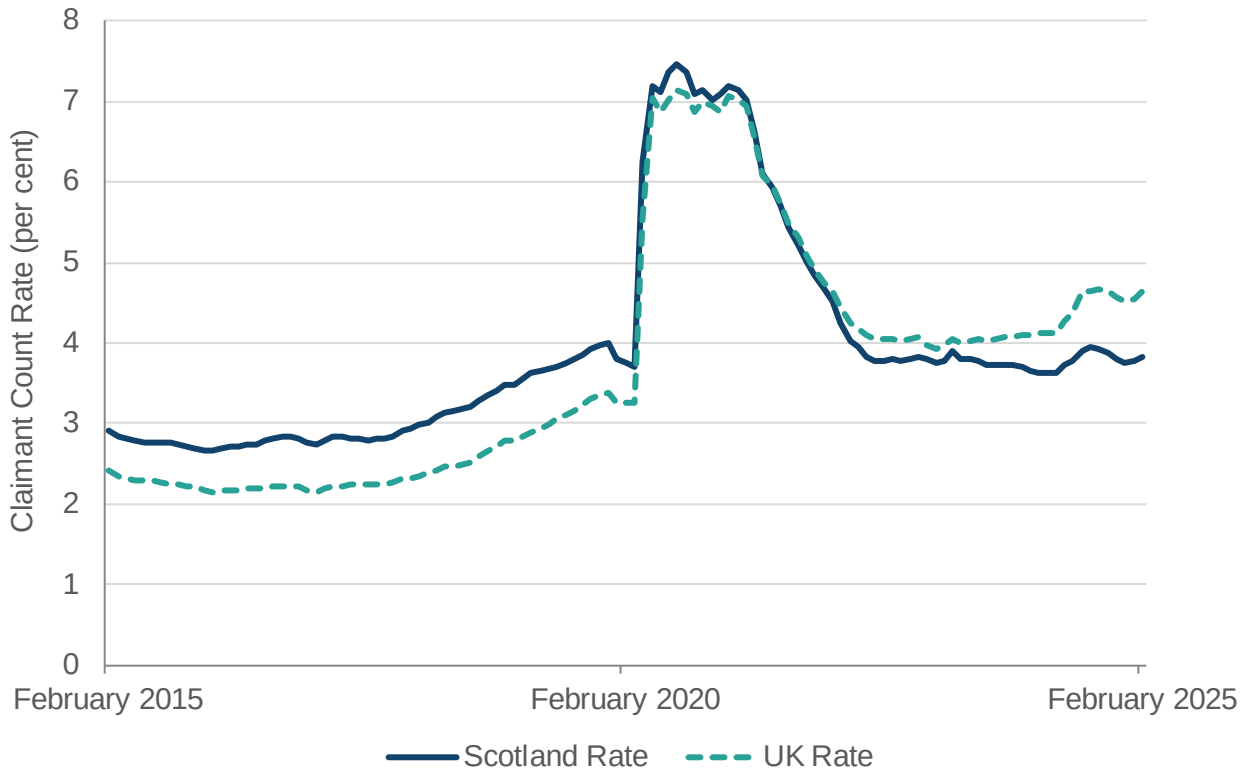
The experimental Claimant Count includes Jobseeker's Allowance Claimants and those claimants of Universal Credit who were claiming principally for the reason of being unemployed (those in the "searching for work" conditionality regime). Those claiming such benefits may be wholly unemployed and seeking work, or may be employed but with low income and/or low hours, that make them eligible for unemployment-related benefit support. As part of the response to the pandemic, the rules around who could claim Universal Credit had changed, meaning an increased proportion of those claiming may actually still be in some kind of work.

Starting in May 2024, the Department for Work and Pensions rolled out an increase in the administrative earnings threshold for full work search conditionality. This change affected around 180,000 claimants in the UK over the summer of 2024, increasing the Claimant Count over that time. This policy change, along with two previous increases to the administrative earnings threshold in September 2022 and January 2023, represent discontinuities in the Claimant Count series.

In February 2025, the claimant count in Scotland was 111,200, an increase of 1,700 (1.5 per cent) over the month and an increase of 5,600 (5.3 per cent) over the year. The claimant count unemployment rate in February 2025 was 3.8 per cent, compared with 4.7 per cent for the UK as a whole.

Chart 5: Experimental claimant count rate for Scotland and the UK showed a large increase at the start of the pandemic, reaching a peak in August 2020 before starting to gradually decrease. The claimant count for Scotland and the UK were fairly constant between mid-2022 and 2023 although the gap has widened through 2024

Claimant Count rate, seasonally adjusted, Scotland and UK, February 2015 to February 2025



Source: Claimant count, ONS

4. Summary of labour market statistics

Employment, unemployment and economic inactivity estimates are presented for November 2024 to January 2025, compared with the quarter before (August to October 2024) and compared with the year before (November 2023 to January 2024).

Data is obtained from a sample survey and is therefore subject to some error. Changes over the quarter and year have been included within the commentary of this publication but caution in their use is advised by ONS due to the increased volatility in the Labour Force Survey (LFS) estimates.

The latest LFS estimates show that there are no statistically significant changes over the quarter or year in the headline labour market rate estimates for Scotland.

Table 1: Labour Market Statistics, Scotland and UK, November 2024 to January 2025

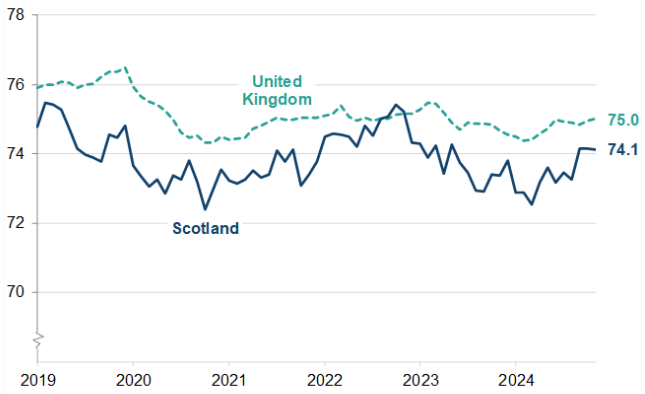
	Percentage point						Level (thousands)					
	Rate (%)	CI	Change on quarter	CI	Change on year	CI	Level	CI	Change on quarter	CI	Change on year	CI
Employment[1]												
Scotland	74.1	(± 1.8)	0.9	(± 2.5)	0.7	(± 3.0)	2,633	(± 62)	26	(± 82)	39	(± 95)
UK	75.0	(± 0.5)	0.1	(± 0.5)	0.3	(± 0.8)	33,922	(± 230)	144	(± 200)	608	(± 350)
Unemployment [2]												
Scotland	3.7	(± 0.9)	0.1	(± 1.2)	-0.5	(± 1.5)	103	(± 23)	5	(± 32)	-13	(± 39)
UK	4.4	(± 0.3)	0.1	(± 0.3)	0.3	(± 0.4)	1,545	(± 99)	40	(± 110)	132	(± 150)
Inactivity [3]												
Scotland	22.9	(± 1.8)	-1.0	(± 2.4)	-0.3	(± 2.8)	780	(± 77)	-33	(± 104)	-11	(± 121)
UK	21.5	(± 0.5)	-0.2	(± 0.4)	-0.6	(± 0.7)	9,268	(± 206)	-65	(± 181)	-169	(± 318)

Source: Labour Force Survey, seasonally adjusted, ONS
Note 1: Levels all persons aged 16 and over; rates all persons aged 16 to 64; denominator all persons aged 16 to 64.
Note 2: Levels and rates all persons aged 16 and over; denominator all economically active persons aged 16 and over.
Note 3: Levels and rates all persons aged 16 to 64, denominator all persons aged 16 to 64.

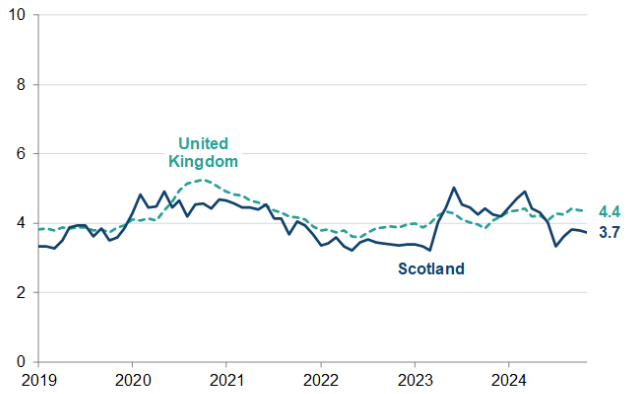
Infographic summary of ONS Labour Force Survey Statistics

November 2024 to January 2025

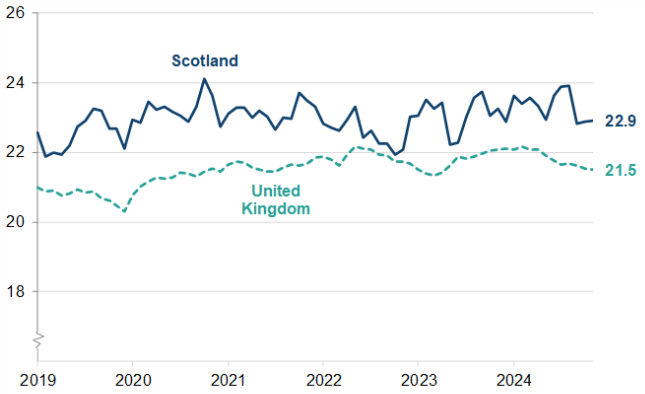
Employment rate
74.1%



Unemployment rate
3.7%



Economic Inactivity rate
22.9%



Quarterly Change	Scotland	0.9 pp ↑	UK	0.1 pp ↑	Scotland	0.1 pp ↑	UK	0.1 pp ↑	Scotland	-1.0 pp ↓	UK	-0.2 pp ↓
Annual Change	Scotland	0.7 pp ↑	UK	0.3 pp ↑	Scotland	-0.5 pp ↓	UK	0.3 pp ↑	Scotland	-0.3 pp ↓	UK	-0.6 pp ↓

Source: Labour Force Survey, seasonally adjusted, ONS

The latest LFS estimates show that there are no statistically significant changes over the quarter or year in the headline labour market rate estimates for Scotland

pp = percentage points
20 March 2025

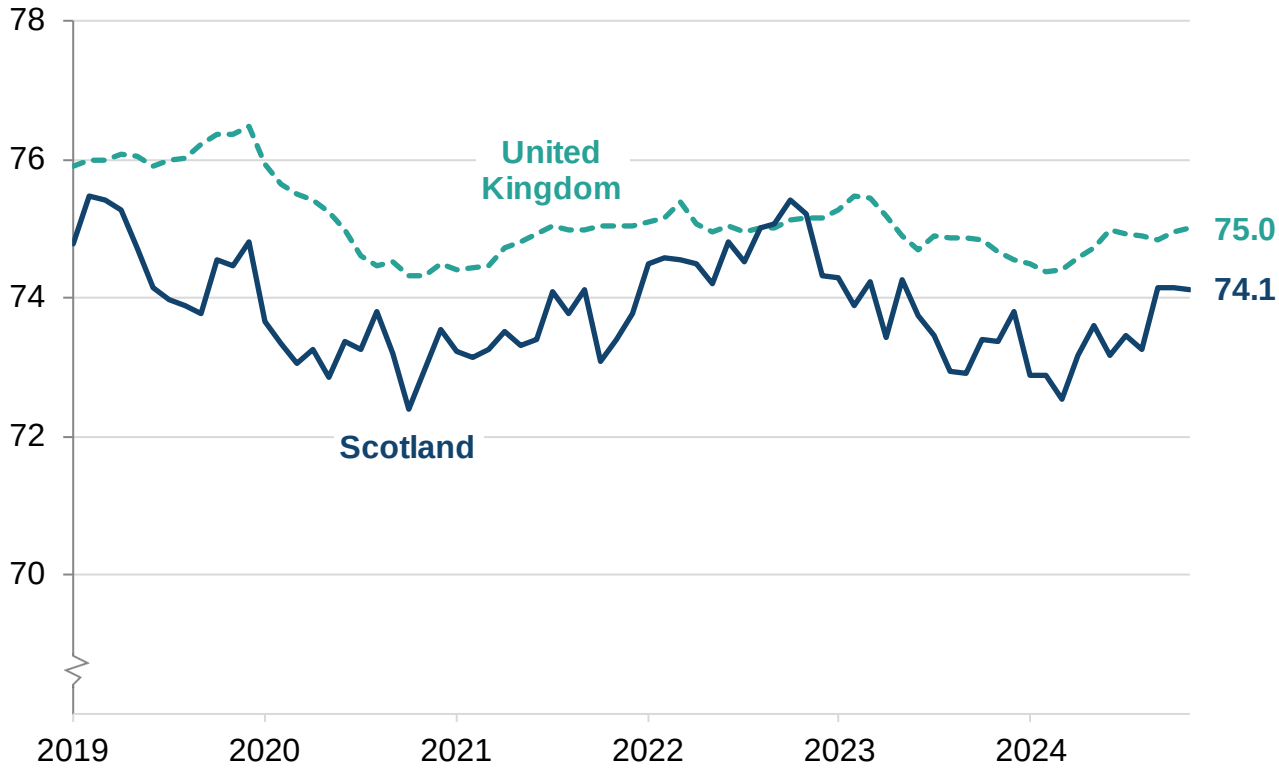
5. Employment estimates

The estimated employment rate for people aged 16 to 64 years in Scotland was 74.1 per cent in November 2024 to January 2025. This is 0.9 percentage points up over the quarter and 0.7 percentage points up over the year.

The estimated UK employment rate was 75.0 per cent in November 2024 to January 2025. This is 0.1 percentage points up on the quarter and 0.3 percentage points up over the year.

Chart 6: The employment rate for Scotland was lower than the UK

Employment rates for persons aged 16 to 64, Scotland and the UK, January to March 2019 through to November 2024 to January 2025



Source: Labour Force Survey, seasonally adjusted, ONS

Chart 7: Scotland had the 2nd highest employment rate across the countries of the UK

Employment rate and annual change for persons aged 16 to 64, UK countries, November 2024 to January 2025 compared to November 2023 to January 2024.

Source: Labour Force Survey, ONS
Note: Annual change shown in percentage points

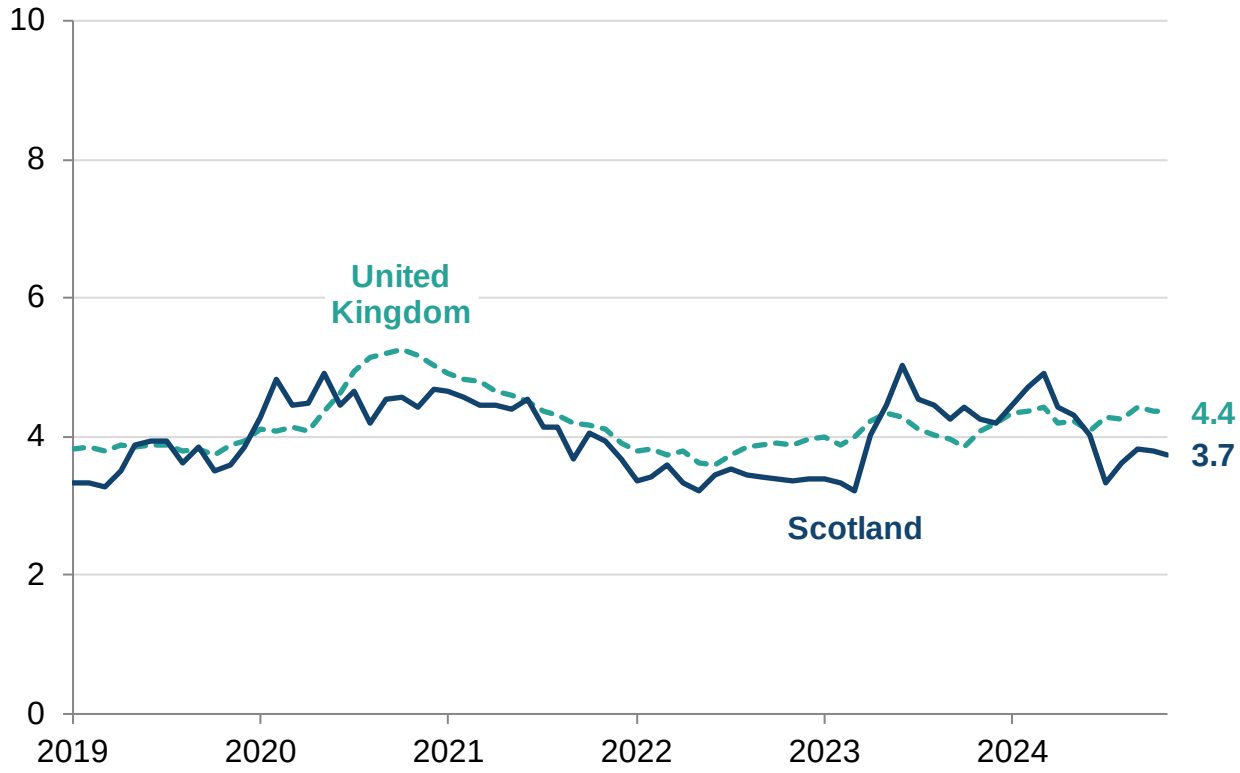
6. Unemployment estimates

The estimated unemployment rate for people aged 16 years and over in Scotland was 3.7 per cent in November 2024 to January 2025. This is 0.1 percentage points up over the quarter but 0.5 percentage points down over the year.

The estimated UK unemployment rate was 4.4 per cent in November 2024 to January 2025. This is 0.1 percentage points up on the quarter and 0.3 percentage points up over the year.

Chart 8: The unemployment rate for Scotland was lower than the UK

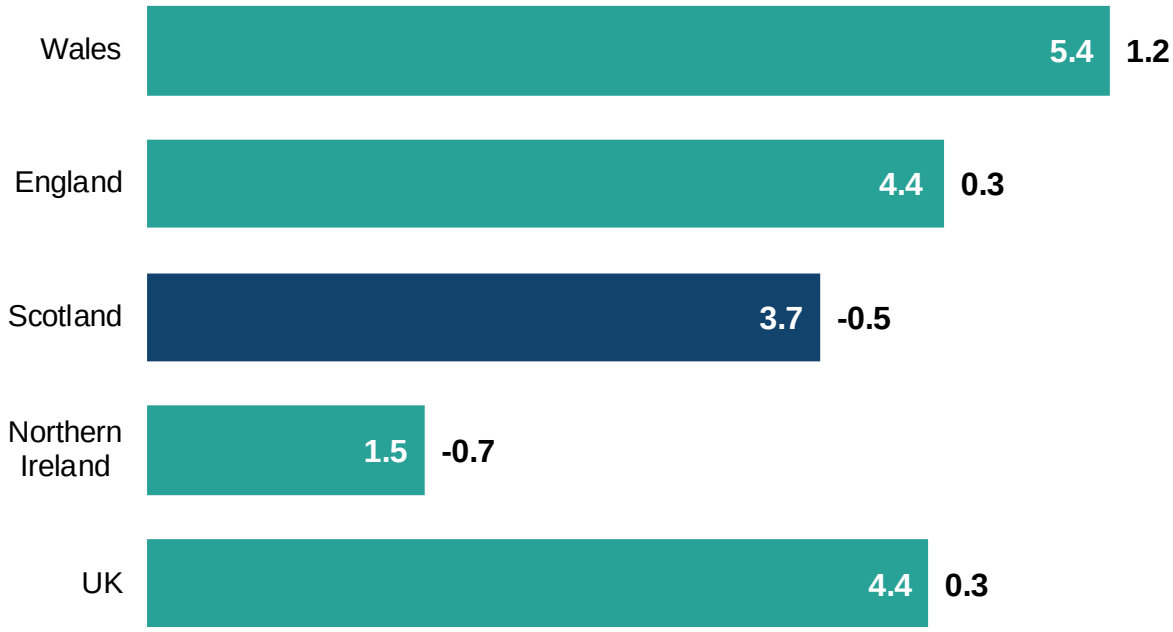
Unemployment rates for persons aged 16 and over, Scotland and the UK, January to March 2019 to November 2024 to January 2025



Source: Labour Force Survey, seasonally adjusted, ONS

Chart 9: Scotland had the 2nd lowest unemployment rate across the countries of the UK

Unemployment Rate and annual change for persons aged 16 and over, UK countries, November 2024 to January 2025 compared to November 2023 to January 2024.



Source: Labour Force Survey, ONS
Note: Annual change shown in percentage points

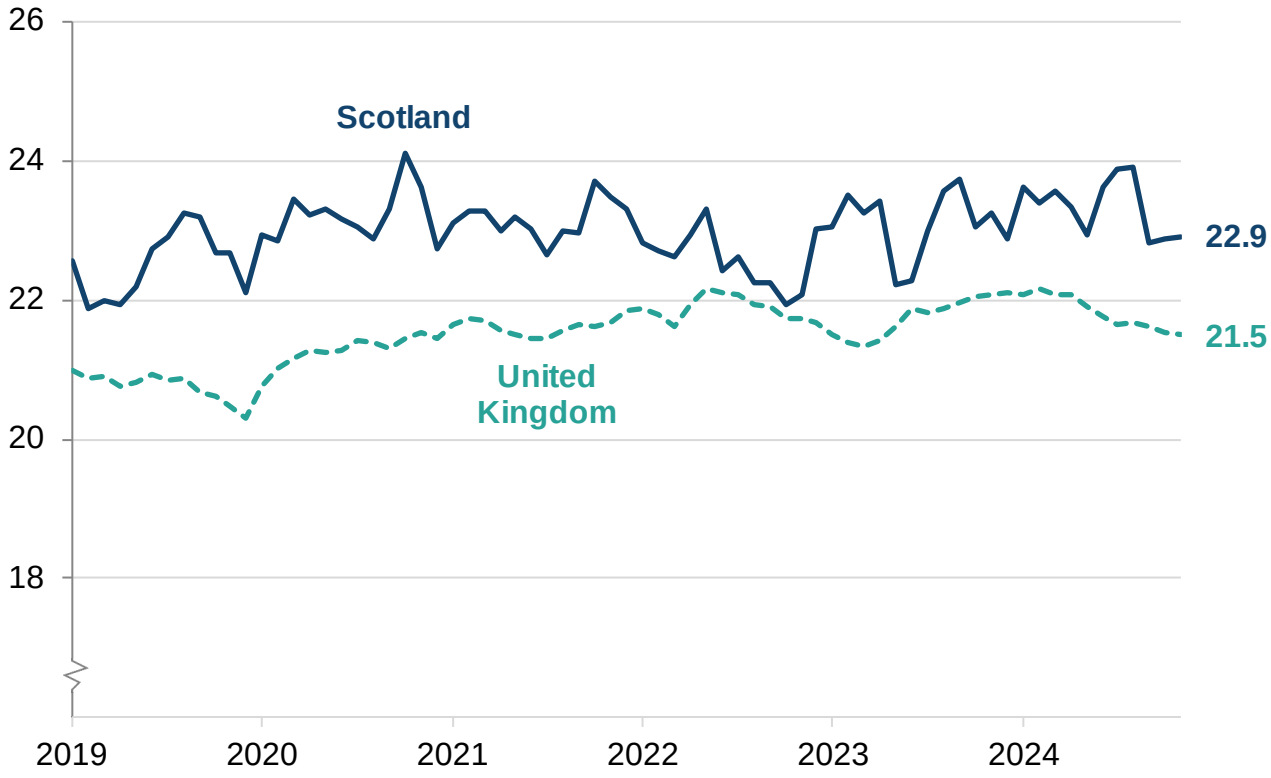
7. Economic Inactivity estimates

The estimated economic inactivity rate for people aged 16 to 64 years in Scotland was 22.9 per cent in November 2024 to January 2025. This is 1.0 percentage point down over the quarter and 0.3 percentage points down over the year.

The estimated UK economic inactivity rate was 21.5 per cent in November 2024 to January 2025. This is 0.2 percentage points down on the quarter and 0.6 percentage points down over the year.

Chart 10: The economic inactivity rate for Scotland was higher than the UK

Economic inactivity rate for persons aged 16 to 64, Scotland and the UK, January to March 2019 through to November 2024 to January 2025



Source: Labour Force Survey, seasonally adjusted, ONS

Chart 11: Scotland had the 2nd lowest economic inactivity rate across the countries of the UK

Economic Inactivity rate and annual change for persons aged 16 to 64, UK countries, November 2024 to January 2025 compared to November 2023 to January 2024.

Source: Labour Force Survey, ONS
Note: Annual change shown in percentage points

8. Labour market estimates for women and men

The Chief Statistician recently published a statement on the issues affecting the Office for National Statistics Labour Force Survey and Annual Population Survey estimates for Scotland. Statistics Statement from the Chief Statistician on the Annual Population Survey – Statistics.

As a result of the increased volatility in the LFS estimates, labour market estimates by sex have been temporarily removed from this publication to allow for additional quality assessment of the data.

9. Glossary

Rates: Rates represent the proportion of the population or subgroup with a certain characteristic. They allow changes in the labour market to be interpreted in a wider context by accounting for changes in the population or the number of people who are economically active. Rates can be calculated for different age groups.

For headline employment, economic activity and economic inactivity, the reference population is those aged 16 to 64. For unemployment, the reference population is the active population aged 16 and over. Thus, people aged 65 and over who continue to be economically active are included in the base while those who are economically inactive will not.

Economically active: The population who are either in employment or unemployed.

Economically inactive: People not in employment and who do not meet the criteria for unemployment. This group includes:

- those who want a job but who have not been seeking work in the last 4 weeks
- those who want a job and are seeking work but not available to start
- those who do not want a job

For example, students not working or seeking work and those in retirement.

Employment: There are two main ways of looking at employment: the number of people with jobs or the number of jobs. These two concepts represent different things as one person can have more than one job. The number of people in employment is measured via the Labour Force Survey and consist of those aged 16 and over. Employment measures the number of people who did at least one hour of paid work or had a job they were temporarily away from. People who do unpaid work in a family business and people on Government-supported training and employment programs are also included. This is in accordance with the International Labour Organisation (ILO) definition.

Unemployment: The ILO definition of unemployment covers people who are 16 years and over:

- without a job, have been actively seeking work in the past four weeks and are available to start work in the next fortnight

or

- out of work, have accepted a job and are waiting to start it in the next two weeks

Employment rate: The proportion of people aged between 16 and 64 years who are in employment.

Unemployment rate: The proportion of economically active people aged 16 and over who are unemployed.

Economic inactivity rate: The number of economically inactive people expressed as a percentage of the relevant population.

10. Data and Methodology

All estimates presented are sourced from the Labour Force Survey, a survey of households collected and published by the Office for National Statistics with the exception of those in sections 1, 2 and 3.

ONS Labour Force Survey

Revision

Within this publication, ONS Labour Force Survey seasonally adjusted data has been revised back to January to March 2019 due to a seasonal adjustment review.

Previous Revisions

ONS reweighted Labour Force Survey (LFS) estimates in December 2024. These are official statistics in development. On 3 December 2024, ONS published an article outlining how the estimates have been affected by reweighting. These estimates were included in the main ONS release on 17 December 2024.

The reweighted LFS estimates incorporate information on the size and composition of the UK population, based on 2022 mid-year estimates. For England, Wales and Northern Ireland, they are projected forward using scaling factors from 2021-based National Population projections, published in January 2024. For Scotland, they are projected forward using scaling factors from 2020-based National Population Projections, published in January 2023.

Given time constraints, ONS have only been able to reweight LFS estimates from January to March 2019 onwards. Therefore, the reweighting exercise creates a discontinuity between December 2018 to February 2019 and January to March 2019 where there will be a step change in LFS estimates. However, the seasonally adjusted UK levels of employment, unemployment and economic inactivity by sex and age-band have been modelled back to June to August 2011 to ensure that headline rates and levels by sex and age-band (datasets A02SA and A05SA) can be assessed without a discontinuity.

Reweighting takes account of more recent population estimates but does not address issues surrounding the increased volatility in the LFS data, resulting from smaller achieved sample sizes. An increased amount of volatility will remain until the recent improvements that have been implemented to increase response levels and the size of datasets fully feed through the survey. ThereforeONS continue to advise caution when interpreting changes in headline rates and recommend using them as part of their suite of labour market indicators, alongside Claimant Count and Pay As You Earn Real Time Information (PAYE RTI) estimates.

The longer-term solution remains the replacement of the Labour Force Survey with the Transformed Labour Force Survey (TLFS).

Labour Market Transformation

ONS are transforming the LFS. They have published a Labour market transformation article providing an update on the transformation of labour market statistics.

ONS also welcome any feedback on this latest update and their plans. Please email them at labour.market.transformation@ons.gov.uk to tell them what you think.

HMRC RTI

This release covers people paid through the HMRC's Pay As You Earn (PAYE) system where their pay is reported through the Real Time Information (RTI) system.

Information presented in this release are experimental monthly estimates of the number of payrolled employees and their median earnings. It includes UK and geographical regions (NUTS1) early estimates of payrolled employment and median pay for the most recent month.

Statistics in this release are based on people who are employed in at least one job paid through HMRC's PAYE system and the monthly estimates reflect the average for each day of the calendar month.

The publication and background information can be accessed on the ONS website.

Claimant Count

The experimental Claimant Count consists of claimants of Jobseekers Allowance (JSA) and some Universal Credit (UC) Claimants. The UC claimants that are included are 1) those that were recorded as not in employment (May 2013-April 2015), and 2) those claimants of Universal Credit who are required to search for work, i.e. within the Searching for Work conditionality regime as defined by the Department for Work & Pensions (from April 2015 onwards). The denominator for the claimant count rate is the claimant count plus workforce jobs. Estimates included in this publication are seasonally adjusted.

Starting in May 2024, the Department for Work and Pensions are rolled out an increase in the administrative earnings threshold for full work search conditionality. This change affected around 180,000 claimants in the UK over the summer of 2024, increasing the Claimant Count over that time. This policy change, along with two previous increases to the administrative earnings threshold in September 2022 and January 2023, represent discontinuities in the Claimant Count series.

Where can labour market data for Scotland be accessed

Labour Force Survey estimates for Scotland are also published on Nomis

This release follows the ONS monthly release of Regional Labour Market Statistics in the UK

A range of Labour Market Statistics for Scotland are also published by the Office for National Statistics

Scottish Government Labour Market Statistics

- Scotland's Labour Market Insights (published on 06 February 2025) is a quarterly publication summarising employment, unemployment and economic inactivity estimates sourced from a range of official labour market statistics for Scotland and the UK.
- The Labour market data for 16 to 24 year olds in Scotland is sourced from the ONS Annual Population Survey (October 2023 to September 2024) and is published quarterly (last published on 22 January 2025).

Other SG labour market publications from the ONS Annual Population Survey:

- Disabled people in the labour market in Scotland: January to December 2022
- Job-related training in Scotland: January to December 2022
- Labour Market Statistics for Scotland by Ethnicity: January to December 2021
- Scotland's Labour Market: People, Places and Regions – Protected Characteristics. Statistics from the Annual Population Survey 2021
- Supporting documents - Scotland's Labour Market: People, Places and Regions – Protected Characteristics. Statistics from the Annual Population Survey 2021

Other SG labour market publications

- Quarterly Public Sector Employment Q4 2024
- Annual Survey of Hours and Earnings 2024
- Topical publications

11. Tell us what you think

We are always interested to hear from our users about how our statistics are used, and how they can be improved.

Join our mailing list

If you would like to receive notification about statistical publications, or find out about consultations on our statistics please join the ScotStat mailing list.

Future publications

Details of future publications can be found on our forthcoming publications page.

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Next update

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