

# OUR NEXT GENERATION

Young People in Moray  
Attitudes and aspirations.  
Research report  
September 2015



# TABLE OF CONTENTS

<b>1</b>	<b>INTRODUCTION</b>	<b>1</b>
	APPROACH	1
	STUDY CONTEXT	1
	THE MORAY CONTEXT	1
<b>2</b>	<b>STAYING AND LEAVING</b>	<b>5</b>
	SELF-IDENTIFICATION	5
	PERCEPTIONS OF STAYERS AND LEAVERS	6
	ASPIRATIONS OF SCHOOL LEAVERS	8
	FACTORS INFLUENCING DECISIONS AFTER LEAVING SCHOOL	9
<b>3</b>	<b>LEARNING IN MORAY</b>	<b>11</b>
	FURTHER AND HIGHER EDUCATION PROVISION	11
	AWARENESS OF UHI AND ITS OFFER	12
	INVERNESS CAMPUS	13
	GRADUATE PLACEMENTS	14
<b>4</b>	<b>WORKING IN MORAY</b>	<b>15</b>
	EMPLOYMENT-RELATED FACTORS IN THE LOCAL AREA	15
	EMPLOYMENT RELATED-FACTORS IN THE H&I	17
	IDEAL PLACE TO WORK	18
	VIEWS ON H&I GROWTH SECTORS	19
	DESIRED QUALITIES IN EMPLOYERS	20
<b>5</b>	<b>LIFE ASPIRATIONS IN MORAY</b>	<b>22</b>
	HOUSING	22
	TRANSPORT	23
	DIGITAL CONNECTIVITY	25
	ARTS, LEISURE AND CULTURE	27
	COMMUNITY	28
<b>6</b>	<b>FUTURE ASPIRATIONS OF YOUNG PEOPLE IN MORAY</b>	<b>30</b>
	MAKING MORAY AN ATTRACTIVE PLACE TO LIVE IN	30
	FUTURE ASPIRATIONS	32
	HOW THE H&I HAS CHANGED	33
<b>7</b>	<b>CONCLUSIONS</b>	<b>34</b>
	KEY SUMMARY FINDINGS	34
	CONCLUDING REMARKS	37
	<b>ANNEXES</b>	
<b>A.</b>	<b>ANNEX 1: SURVEY RESPONSE PROFILE</b>	<b>38</b>
	NUMBER OF RESPONDENTS	38
	AGE	38
	GENDER	38
	GEOGRAPHY	39
	STATUS	39
	SUMMARY	39

# 1 Introduction

1.1 This report presents the findings of a wide-ranging study to explore the attitudes and aspirations of young people aged 15-30 in relation to the Highlands and Islands (H&I) of Scotland, with a particular focus on young people in Moray. Overall, a total of 4,409 young people from within and outwith the H&I participated in the research, sharing their views on the region as a place to live, work and study. This summary report analyses the views of 630 young people in Moray who contributed to the research.

1.2 The report presents findings for Moray as a whole, providing comparisons with the results for the wider H&I. Where possible, analysis is also provided for young people living in Elgin, West Moray and East Moray, highlighting where their views differ.

## Approach

1.3 The approach made extensive use of social media, through which young people were invited to complete an online survey. Four high schools in Moray participated in the study. An online discussion portal allowed young people to provide further insight on their views. The study also gathered perspectives from stakeholders from both within and outwith the H&I region, including representatives from public sector and other organisations.

## Study context

1.4 The H&I have a deficit of young people, and there has traditionally been an outflow of young people from the region. There are a wide range of factors that impact on the choices and aspirations of young people, including educational and employment opportunities, the cost of living, transport, housing, cultural and connectivity issues. There are also strong local factors affecting decision-making, including close community ties for many young people in the region.

1.5 There are a range of policies and strategic interventions that have been, and are being, implemented, both locally within Moray, across the H&I region and nationally. These have a varying level of explicit focus and degree of impact on young people in the region.

## The Moray context

### Population and Impact of Geography

1.6 Census data from 2011 highlights the 'deficit' of young people that exists across the H&I. In 2011, there were 16,254 young people aged 15-29 recorded as living in Moray, 17% of the total Moray population, marginally higher than the 16% across the H&I, and 3 percentage points lower than the 20% across Scotland. Between 2010 and 2012, Moray experienced net out-migration of 195 young people aged 15-29 years and its young population is expected to decrease 15% by 2037, based on 2012-based population projections. Despite this prediction, Moray's 15-29 years population grew by 9% between 2001 and 2011 (the regional growth rate was 10%).<sup>1</sup>

1.7 Moray covers a large geographic area of approximately 2,238km<sup>2</sup> and, with a total population of 94,750 according to 2014 mid-year estimates<sup>2</sup>, has a low population density of

---

<sup>1</sup> Highlands and Islands Enterprise (2014) *Young People in the Highlands and Islands: Socio-economic Profile*. May 2014, p.17-18

<sup>2</sup> ONS (2014) Mid Year Population Estimates.

approximately 42 inhabitants per km<sup>2</sup>. The largest population centre is Elgin, which is also the administrative centre. Other towns include Forres and Buckie.

1.8 Compared to the rest of the H&I and Scotland, primary industries, manufacturing (including food and drink) and public administration and defence industries are more prominent in Moray, and there is a larger proportion of employment in associate professional and technical occupations, but also in process, plant and machine operative and elementary occupations.<sup>3</sup> The proportion of adults with degree-level qualifications is below the H&I and Scotland averages, while a slightly higher percentage have no formal qualifications than regionally (by 0.4%), although this is in line with the national average. Nevertheless, positive destination rates for school leavers are above the H&I and Scotland averages, as is school attainment, and unemployment rates tend to be below those for the H&I and Scotland.<sup>4</sup>

1.9 In addition to the traditional industries of farming, fishing and forestry, Moray has strengths in a number of growth sectors. Food and drink represents 19% of Moray's GVA, compared to 3% for the sector in Scotland and 2% in the UK.<sup>5</sup> It is home to the Malt Whisky Trail and, with more than 45 distilleries located in the area, exporting whisky across the world, whisky distilleries are a key contributor to the local economy. Further, two international food producers – Baxters Food Group and Walkers Shortbread – are located in Moray.<sup>6</sup> Other prominent sectors include tourism, forest products, textiles and specialised metalworking.<sup>7</sup> The Council also identifies growth potential in the Life sciences, engineering production and manufacturing and business services sectors.<sup>8</sup>

1.10 Moray is located between Aberdeen and Inverness, and between the Highlands and the flat farmlands of north east Scotland. Public transport connections centre around the main town of Elgin, and Elgin, Keith and Forres are on the rail line running between Inverness and Aberdeen. Elgin is also situated along the A96, connecting Aberdeen and Inverness. Nevertheless, some communities are relatively remote, leading to some economic fragility. This remoteness gives rise to a number of infrastructure and connectivity issues that have a bearing on potential growth opportunities, at least to some extent.

### **Key policies and strategies**

1.11 As detailed, Moray is home to a number of growth sectors, supported by HIE's long-term strategy and current Operating Plan priorities, notably Food and drink, Sustainable tourism, Life sciences, Creative industries and Financial and business services. These are important to pursuing the regional goal of economic diversification, ownership and sustainability.

1.12 Moray's Economic Strategy (2012) puts forward a vision for Moray to be a *"vibrant 21<sup>st</sup> century region with a broad business base providing stable well paid employment, and strong communities with a growing population,"* with a focus on further developing Elgin as the key growth centre. Its key targets include encouraging population growth; creating at least 5,000 new employment opportunities, focusing on *"high quality jobs in engineering and science and technology – coupled with an increase in employment in long established activities, such as*

---

<sup>3</sup> Highlands and Islands Enterprise (2014) *Moray Area Profile*. May 2014, p.2

<sup>4</sup> Highlands and Islands Enterprise (2014) *Moray Area Profile*. May 2014, p.2

<sup>5</sup> <http://www.hie.co.uk/regional-information/area-information/moray/growth-sector-profiles/default.html>

<sup>6</sup> <http://www.moray.gov.uk/downloads/file92928.pdf>, p.16

<sup>7</sup> <http://www.hie.co.uk/regional-information/area-information/moray/growth-sector-profiles/default.html>

<sup>8</sup> <http://www.moray.gov.uk/downloads/file92928.pdf>, p.27

*tourism, food and drink and manufacturing,” as well social enterprise; and increasing average earnings.*<sup>9</sup>

1.13 The Strategy is centred on five key ‘internationally recognised drivers of competitiveness’: people, business, infrastructure, communities and identity. In order to achieve its vision, the strategy puts forward six ‘enabling actions’: *“Encouraging Population Growth; Ease of Doing Business; Business Support; Improvements in Regional Accessibility; Developing the Social Economy; [and] Developing Market Oriented Propositions for Inward Investment in Moray.”*<sup>10</sup> A number of strategic projects are proposed, with *“opportunities for investment in life sciences, technology, engineering, renewable energy, broadband, tourism and an Elgin City Centre Masterplan.”*<sup>11</sup> It also identifies the need to address the out-migration of young people.<sup>12</sup>

1.14 The above objectives were in line with the national Strategic Priorities from the Scottish Government Economic Strategy of 2011, namely: a supportive business environment; transition to a low carbon economy; learning skills and well-being; infrastructure development and place; effective government; and equity. Most of these priorities are being taken forward in the new Scottish Economic Strategy 2015, where they have been consolidated into four streamlined categories: investment, innovation, inclusive growth, and internationalisation.<sup>13</sup>

1.15 The Community Planning Partnership’s Single Outcome Agreement (SOA) 2012-15 is the framework that Moray has adopted to assess its outcomes, which are based on the Scottish Government’s national outcomes. They are as follows, with outcomes two and five being particularly relevant to young people:

1. *“healthier citizens;*
2. *More ambitious and confident children and young people able to fulfil their potential;*
3. *Adults living healthier, sustainable, independent lives safeguarded from harm;*
4. *A more prosperous and fairer Moray; [and]*
5. *Employability and employment skills.”*<sup>14</sup>

1.16 At a regional level, the Highlands and Islands Regional Skills Investment Plan<sup>15</sup> (RSIP), developed by Skills Development Scotland (SDS), identifies skills challenges. It cites the greatest challenge for the H&I as the retention and attraction of working age people. Out-migration is also identified as a major skills challenge, with net out-migration evident for all ages from 15-39. The plan identifies growth opportunities for the region, including Energy and the Creative industries.

## **Key Investments**

1.17 HIE, Moray Council and other partners are responding to the opportunities and challenges in Moray through key investments. These include the innovation and incubation high specification centre at Horizon Scotland, a 12,000 sq. ft building hosting units to rent, rooms for

<sup>9</sup> Moray Council (2012) *The Moray Economic Strategy*, p.6

<sup>10</sup> Moray Council (2012) *The Moray Economic Strategy*, p.6

<sup>11</sup> [http://www.moray.gov.uk/moray\\_standard/page\\_75361.html](http://www.moray.gov.uk/moray_standard/page_75361.html)

<sup>12</sup> [http://www.moray.gov.uk/moray\\_standard/page\\_96870.html](http://www.moray.gov.uk/moray_standard/page_96870.html)

<sup>13</sup> The Scottish Government (2015) *Scotland’s Economic Strategy*, p.36.

<http://www.gov.scot/Resource/0047/00472389.pdf>

<sup>14</sup>

<http://www.moray.gov.uk/minutes/data/CPB20120628/Item%202%20Final%20Draft%20Single%20Outcome%20Agreement.pdf>, p.3

<sup>15</sup> SDS (2014) Highlands and Islands Skills Investment Plan



hire and a social networking space, amongst other features. This is funded by HIE and ERDF monies.<sup>16</sup> This is also home to the Institute for Design Innovation (InDI), a strategic partnership between Glasgow School of Art and HIE and part-funded by ERDF. In January 2015, it was announced that InDI would be expanding its presence to offer further *“teaching and research opportunities available to students, businesses and communities from across the region,”* with £10m in funding to 2019.<sup>17</sup>

1.18 Other initiatives include the recently opened £6.5m Alexander Graham Bell Centre, which has been *“designed to support the ground breaking work being carried out in digital healthcare in the Moray Region.”* It is a joint initiative between Moray College UHI and NHS Grampian, offering a centre of excellence to support research, education and business. The *“collaborative hub provides opportunities and facilities for new business and research developments, creating important and strong links between the private sector, medical practitioners and academia.”* There are also five research and commercialisation units available for businesses.<sup>18</sup>

1.19 There is also an Enterprise Park at Forres, developed by HIE, which is home to a diverse range of businesses. There are a number of units available for businesses, and a variety of specialist companies are located there, ranging from life sciences to engineering, including Capita, Scotland Electronic International and Mohn Aqua Group.<sup>19</sup>

1.20 Other Council-led priority initiatives include town regeneration, with funding, support and development of initiatives including the Elgin Business Improvement District, the Elgin – City of the Future study, the Moray Towns Partnership and the Keith Conservation Area Scheme, and more generally, support to local businesses through Business Gateway, the East of Scotland Investment Fund and Business Connection Vouchers. There is also Council investment in tourism to support visitor attractions and information, the Moray Film Liaison Service, and additional funding for programmes such as the Rural Action Plan for Moray.<sup>20</sup>

1.21 Wide-scale infrastructure investments, such as the Next Generation Broadband Access (NGA) roll-out are also helping to address challenges in the area. The University of the Highlands and Islands (UHI) Moray College, the area's principal institute of higher learning, will continue to support local industry with research, innovation, and overall skills development in line with community, regional and national priorities.

---

<sup>16</sup> <http://www.hie.co.uk/regional-information/area-information/moray/projects/horizon-scotland.html>

<sup>17</sup> <http://www.hie.co.uk/about-hie/news-and-media/archive/enterprise-agency-and-art-school-reveal-major-investment-plan-in-highlands-and-islands.html#sthash.xOSsFpPL.dpbs>

<sup>18</sup> <http://www.hie.co.uk/regional-information/area-information/moray/projects/alexander-graham-bell-centre.html>

<sup>19</sup> <http://www.hie.co.uk/regional-information/area-information/moray/projects/enterprise-park--forres.html>

<sup>20</sup> [http://www.moray.gov.uk/moray\\_standard/page\\_69085.html](http://www.moray.gov.uk/moray_standard/page_69085.html)

## 2 Staying and Leaving

2.1 This section of the report considers whether respondents are likely to either stay in or leave the Highlands and Islands (and whether this is out of choice or out of necessity, real or perceived), and how respondents view the choices of others.

### Self-identification

2.2 Young people in Moray are more likely to want to leave their local area than is the case across the H&I, with 45% describing themselves as **committed leavers**, in contrast to 40% regionally. Conversely, four in 10 (40%) regard themselves as **committed stayers**, three percentage points lower than in the H&I as a whole (43%). The proportion of **reluctant leavers** in Moray at 10% is, lower than the 13% across the wider region, with the proportion of **reluctant stayers** in line with the regional average of 5%.

**Table 2.1**

Which of the following best describes you? <i>Expressed in terms of % of total excluding potential returners, new residents and none of the above</i>	Moray (n=630)	Highlands & Islands (n=3,607)
	%	%
<b>Committed stayer:</b> <i>I live in the H&amp;I and I plan on living and working here</i>	40	43
<b>Reluctant stayer:</b> <i>I live in the H&amp;I; I would prefer to leave but I don't think I will be able to</i>	5	5
<b>Reluctant leaver:</b> <i>I live in the H&amp;I; I would prefer to stay but I don't think I will be able to live and work here</i>	10	13
<b>Committed leaver:</b> <i>I live in the H&amp;I, but I plan to leave, and live and work elsewhere</i>	45	40

### Geographic variations

2.3 Young people from East Moray are significantly more likely to describe themselves as committed leavers (58%, markedly higher than the regional average of 40%), compared to just 29% in West Moray and 35% in Elgin. This is influenced by the large proportion of school pupils responding from this area.<sup>21</sup> West Moray has the greatest proportion of committed stayers (53%) followed by Elgin (48%) and East Moray (30%).

### Variation by age and status

2.4 It is those aged 15-18 that are most likely to see themselves as committed leavers, as is the case across the H&I, although at 58% this is more pronounced than for this age group in the region overall (52%). This is highest in East Moray (62%) and lower in Elgin (52%) and West Moray (48%). For school pupils, it is those from West Moray that are most likely to see themselves as committed leavers (75%), above the Moray average for school pupils of 62% and the regional average of 56%, although this is from a low base.

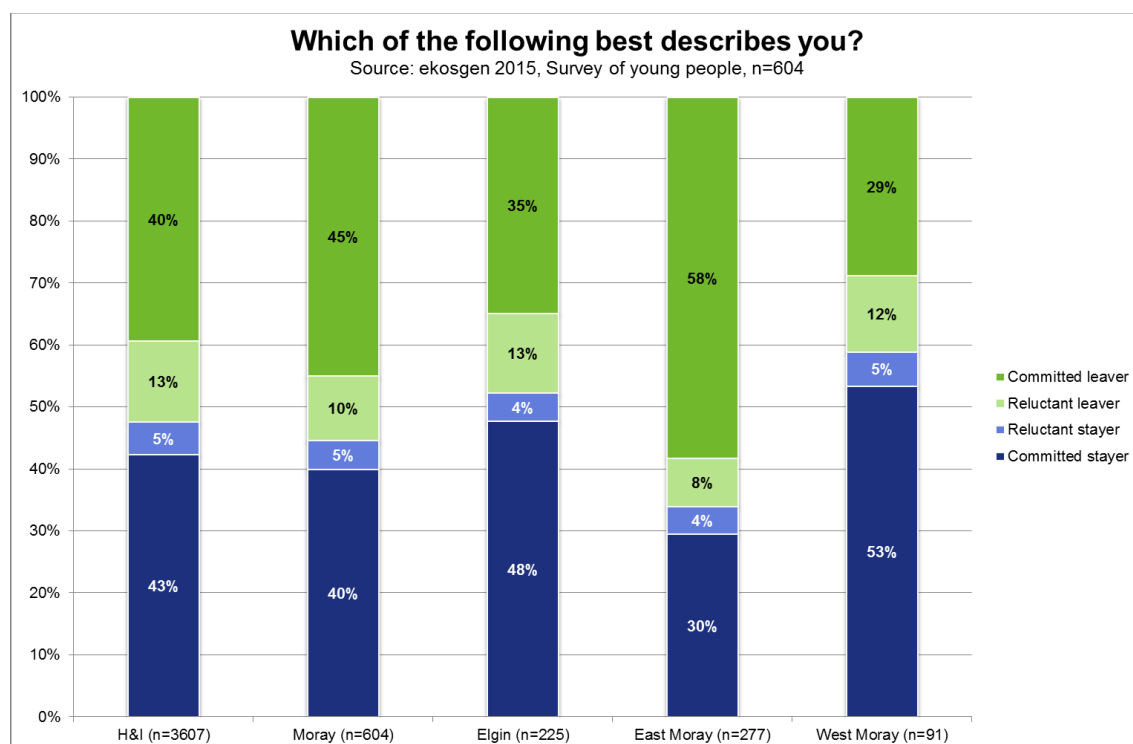
2.5 By the age of 25-30, the vast majority of those in East Moray see themselves as committed stayers (86%), higher than the overall Moray average for this group (74%). Indeed by

<sup>21</sup> Please note, 84% of East Moray respondents are school pupils, compared to an average of 44% across the region.

this age, there are no committed leavers in East Moray, and those that see themselves as leavers are reluctant ones. For those in Moray as a whole, it is 19-24 year-olds who are most likely to be reluctant leavers (16%), above the regional rate for this group of (12%) and highest in Elgin (18%).

2.6 In all, 44% of university and college students are committed stayers, but a further 21% see themselves as reluctant leavers, higher than the regional average of 16% for this group. Three-quarters of those in employment are committed stayers, well above the 58% regionally, whilst the proportion of committed stayers amongst those undertaking apprenticeships is higher still, at 83%, compared to 59% for the H&I.

**Figure 2.1**



## Perceptions of stayers and leavers

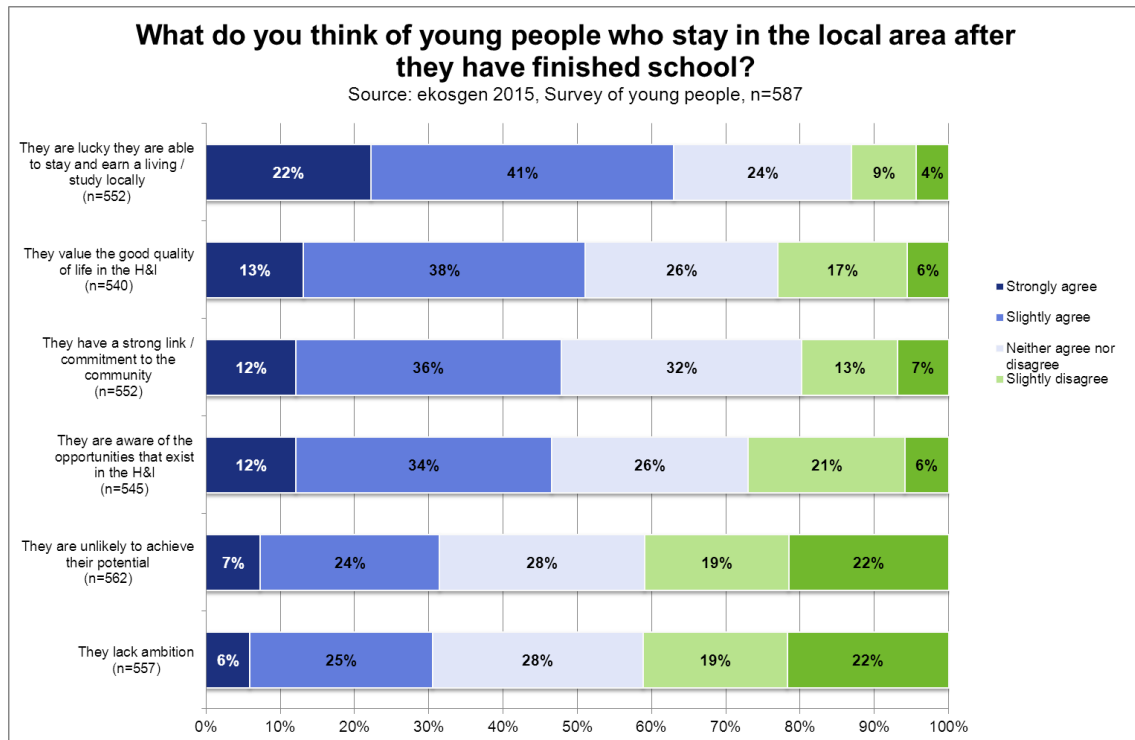
### Views on those who stay

2.7 Almost two thirds (63%) think that young people who stay are lucky to be able to do so, above the regional average of 61%. Just over half (51%) think those who stay value the good quality of life, although this is below the average for the H&I overall (58%). Just *under* half (48%) think those who stay have a strong commitment to the local community, lower than the 54% across the H&I. Those in Elgin are more likely to be of the view that stayers have a strong link to their community and are lucky to be able to stay; those in West Moray are more likely to consider those who stay as valuing the good quality of life (55%).

2.8 More negative perceptions of the decision to stay in Moray are slightly lower than in the H&I as a whole. Almost a third of young people (31%) think that stayers lack ambition, compared to 34% regionally, whilst 31% think that others who stay limit their potential (also lower than the regional average of 39%). More young people from West Moray think those who stay lack ambition (37%).



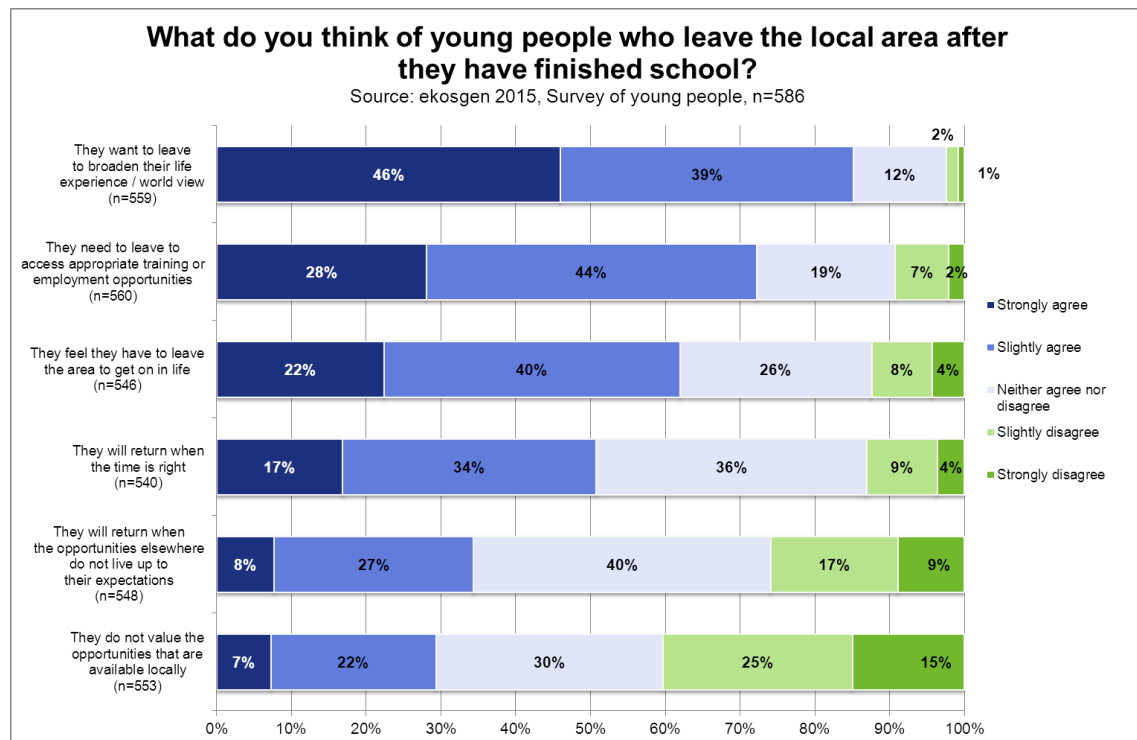
**Figure 2.2**



### Views on those who leave

2.9 In all, 85% of young people in Moray agree that leavers wish to do so to broaden their world view, slightly lower than the regional average of 87%; the proportion strongly agreeing also being lower than regionally (46% versus 52%). This is highest in West Moray (92%) and lowest in East Moray (81%). Almost three in four (72%) think that leavers do so to access appropriate training or employment opportunities, highest in Elgin (75%), although this is lower than the H&I average of 78%. Just over half (51%) consider that leavers will return when the time is right, lower than the 56% across the H&I.

**Figure 2.3**



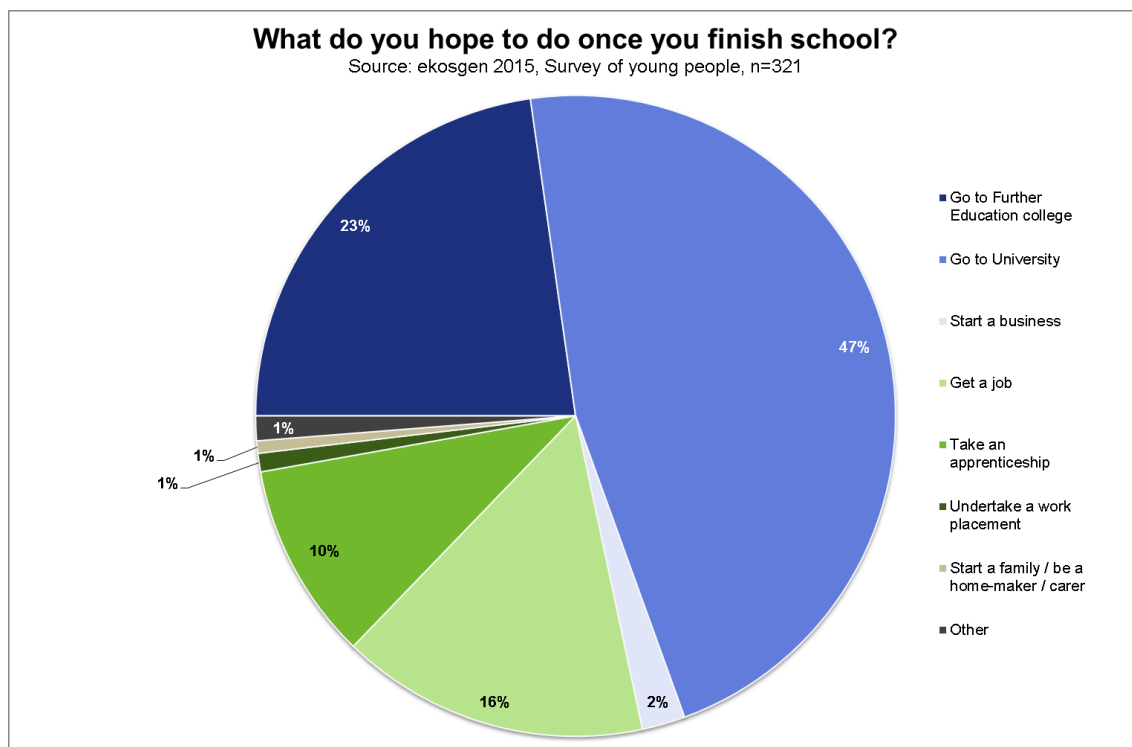
## Aspirations of school leavers

2.10 The majority of school pupils in Moray wish to go to university (47%) or undertake further education after leaving school (23%), which at 70% combined is slightly lower than for the H&I as a whole (72%). In West Moray, a much higher proportion wishes to go to university (71%), and just seven per cent to undertake further education. In Elgin, 54% wish to go to university, and 26% want to undertake further education. In East Moray, fewer still want to go to university (43%) and 23% wish to go to into FE.

2.11 In all, 12% of those in East Moray would like to undertake an apprenticeship (10% in the H&I), and 17% want to go straight into employment post-school, more than the 12% regionally. In line with the H&I overall, just 2% of school leavers in Moray want to start their own business.

2.12 Just over a fifth of young people from Moray would like to stay locally (14%) or in the H&I after leaving school (8%). This compares with 14% and 10% for the H&I. Of the 50% who want to go somewhere in Scotland outwith the H&I, some 21% want to be 'elsewhere in Scotland', 15% in the Central Belt and 14% in Aberdeen – which, given Moray's proximity to Aberdeen, is the highest proportion aspiring to be living in Aberdeen of all H&I areas. The most popular destinations for post-school activity are elsewhere in Scotland (21%), elsewhere in the world (19%) and the Central Belt (15%). There are local variations, where 21% in Elgin wish to stay locally. By contrast, 36% in West Moray wish to go to the Central Belt post-school, strongly linked to the high levels of aspiration amongst young people there to attend university, although it should be noted too that here the sample size was also small and there may be data unreliability.

**Figure 2.4**



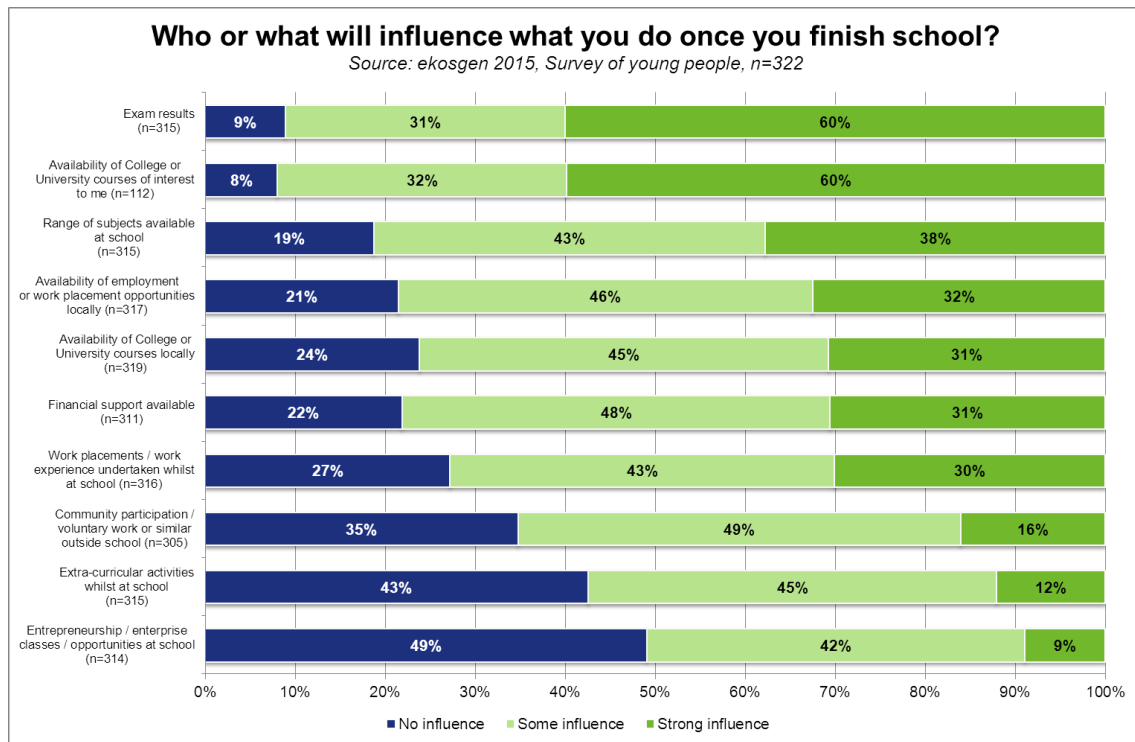
2.13 Females are more likely to want to stay locally post-school – 14% wish to do so in total, versus 12% of males. Conversely, females are more likely to want to go to the Central Belt (22% versus six per cent of males), again linked to university aspiration.

### Factors influencing decisions after leaving school

2.14 Factors that may influence post-school decisions for young people in Moray are generally more pronounced than in the region as a whole. In all, 92% say that interesting college or university courses have at least some influence (89% regionally), and 60% strongly so (versus 55% for H&I). Just over 91% stated that exam results are influential, similar to regionally although slightly more strongly agree (62% vs 60%). The range of subjects available at school in Moray is also deemed to be a stronger decision-making factor, at 81% compared to 80% regionally, with 38% strongly agreeing compared to 33% across the H&I.

2.15 Further, the availability of local employment / work placement opportunities (78%) is of greater influence than regionally (75%), as is the availability of local college / university courses (76% versus 69% regionally). Work experience undertaken at school, and local work placements (73%) are of broadly comparable influence to the H&I average (74%).

**Figure 2.5**



2.16 Again linked to higher levels of university aspiration amongst those in West Moray, all young people there said that exam results had at least some influence on their post school decisions, as does the availability of college or university courses of interest. Young people in West Moray also stated that the availability of *local* college or university courses is more influential (86%) and also more *strongly* influential. Those in Elgin and West Moray are more likely to view work experience / placements, and community participation and voluntary work as influential, compared to young people in East Moray. By contrast, a greater proportion in East Moray consider entrepreneurship and enterprise classes and opportunities to be an influencing factor, than those in Elgin and West Moray.

## 3 Learning in Moray

3.1 This chapter explores attitudes and aspirations evident in Moray in relation to learning, covering Further Education (FE) and Higher Education (HE), and related matters such as graduate placements and the opportunities presented in terms of routes into employment from FE and HE.

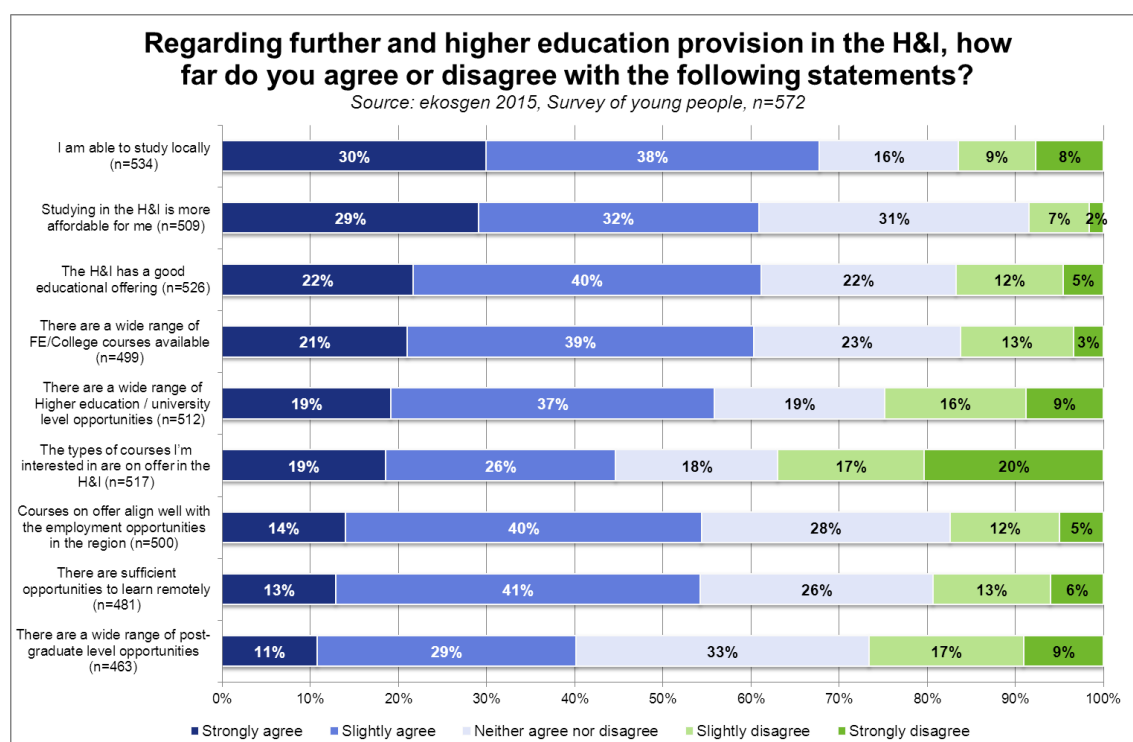
### Further and higher education provision

3.2 Young people in Moray consider there to be a good educational offering in the H&I. In all, 62% think so, higher than the regional average of 56%, with a greater proportion than regionally strongly agreeing this is the case (22% versus 17%). There is particularly good feedback on the ability to study locally, where 68% feel they can do so, compared to 57% regionally. In all, 61% think that studying in the H&I is affordable for them, in line with the regional average.

3.3 FE opportunities in the H&I are also viewed more positively by young people in Moray than in the H&I overall, with 60% agreeing there are a wide range of courses available, compared with 54% regionally. The range of HE opportunities is rated higher than the regional average, 56% compared to 45%. More young people also agree that there are interesting courses available in the H&I (45%), compared to 40% who think this regionally. A further 54% think that the educational offer is well aligned to employment opportunities, broadly in line with the H&I average of 53%.

3.4 The ability to study locally is perceived to be highest in Elgin (77%) and West Moray (70%) and lower in East Moray (59%). Affordability of studying locally is also perceived to be much greater in West Moray (77%) and Elgin (66%) than it is by those in East Moray (52%). A little over half (54%) consider there to be sufficient opportunities to learn remotely, above the regional average of 49%, although this does fall to 48% in East Moray (48%).

**Figure 3.1**



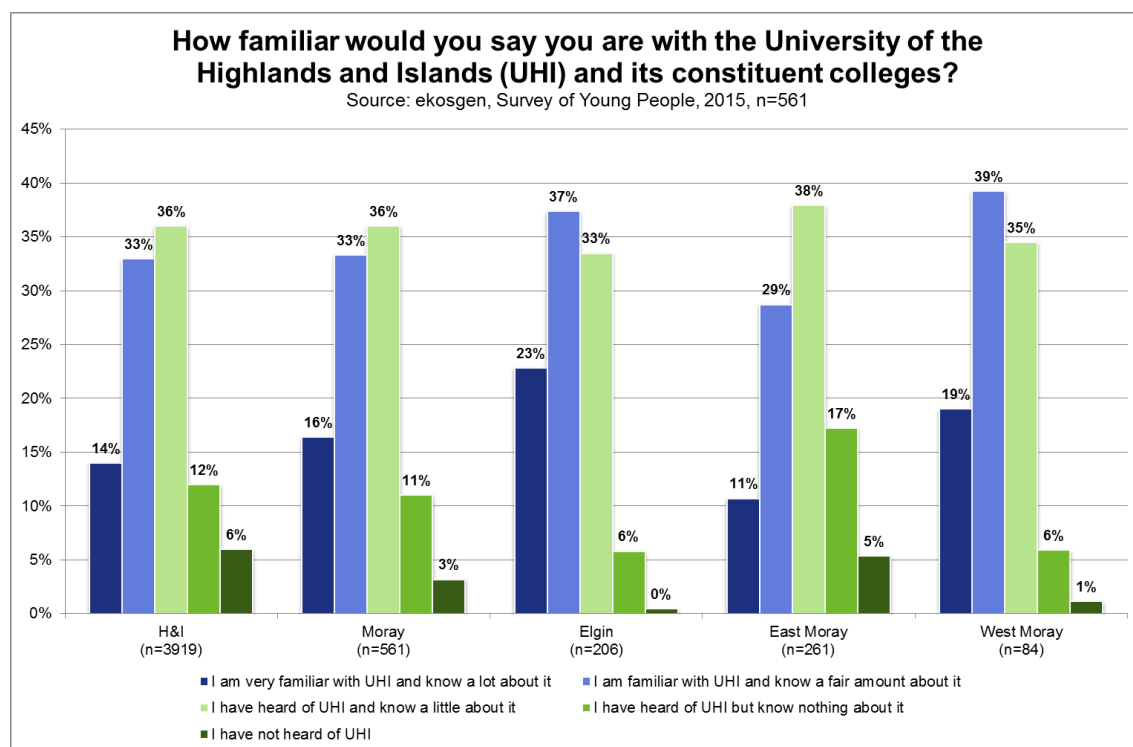
3.5 In line with the regional average, young people aged 19-24 are most likely to agree there is a good educational offering. Relative to the regional picture, it is those aged 15-18, including those at school, who are more likely to agree that the range of FE courses is good (as well as HE courses), which is a positive finding. In all, 76% of 19-24 year-olds in Moray and 85% of students think studying in the H&I is affordable. Three in four students (75%) also think they are able to study locally, which is higher than the regional average.

## Awareness of UHI and its offer

3.6 There is good awareness of UHI amongst young people across the H&I (where 83% know at least something of UHI), and this is even higher in Moray, at nearly nine in 10 young people. Additionally, a slightly larger proportion says they know a *lot* about UHI (16% against 14%). Awareness is strongest amongst those in Elgin, where three-fifths know at least a fair amount about UHI, around 20 percentage points higher than is the case in East Moray.

3.7 Awareness of UHI is highest amongst those aged 19-24 in Moray (where two thirds know at least a fair amount) and amongst students (80%). All those in Elgin aged 25-30 have at least heard of UHI. It is 15-18 year-olds in East Moray that know the least about the university – 24% have either not heard of, or know nothing of UHI, although even here this is around the regional average for this age group (of 23%).

**Figure 3.2**



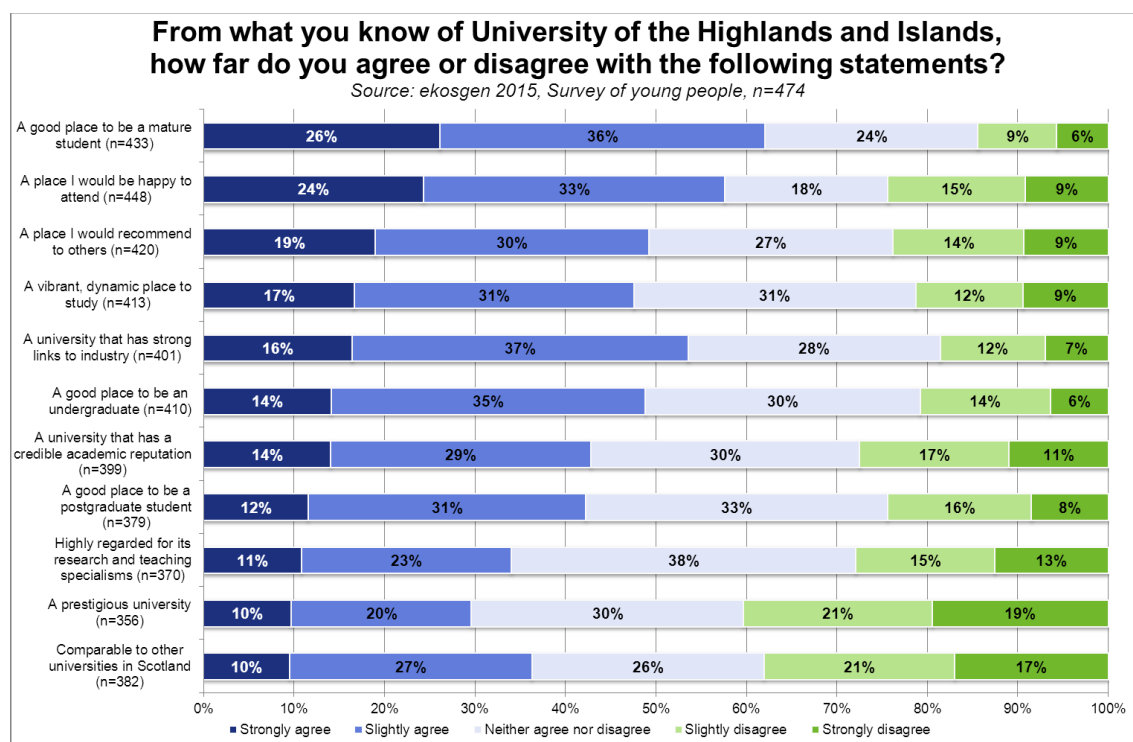
3.8 UHI is seen as a good place to be a mature student by 62%, just below the regional average of 64%, which falls to 53% in East Moray. Almost half (49%) think UHI is a good place to be an *undergraduate* student, in line with the H&I average of 48%, and the proportion is higher amongst those in Elgin (54%) than elsewhere in Moray. Over four in 10, the same proportion as regionally, rate its suitability for postgraduate study.



3.9 Just over four in 10 (43%) think UHI has a credible academic reputation, close to the regional average (42%). This is particularly the case in Elgin, where 51% think so. Over a third consider it comparable to other universities in Scotland, slightly higher than regionally (35%), and positive perceptions are again highest in Elgin (42%).

3.10 Overall, almost six in ten young people in Moray would be happy to attend UHI, the same proportion as regionally. For 19-24 year-olds this rises to 62%, to 68% for 25-30 year olds and further still to 69% amongst students. In all, 50% of school pupils would be happy to attend UHI, and this is in line with the regional average. The proportion happy to attend is highest in West Moray (67%) followed by Elgin (64%).

**Figure 3.3**

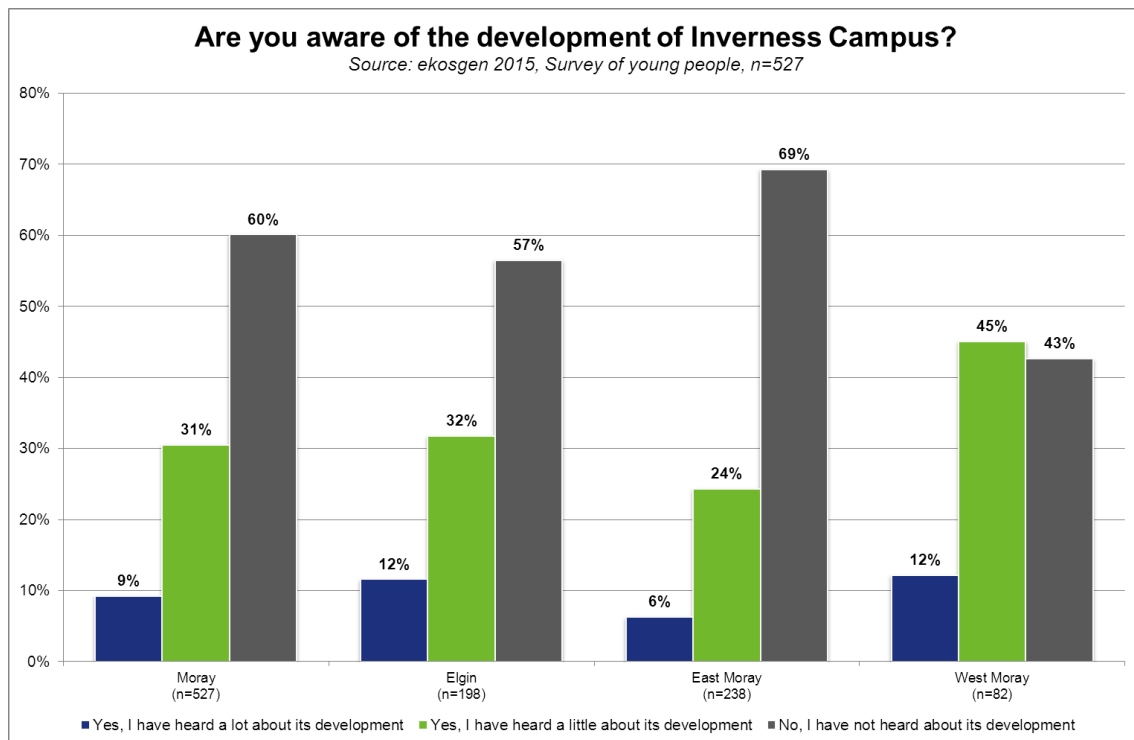


## Inverness Campus

3.11 Inverness Campus, which will see Inverness College UHI co-located with centres for business and research, opened in May 2015. Whilst across the H&I almost six in 10 (58%) know something of the Campus, this is lower in all parts of Moray, at 57% for West Moray, falling to just over four in 10 in Elgin and further still to around three in 10 in East Moray.

3.12 Despite lower levels of awareness of the Campus than the regional average, more than six in 10 (62%) think it offers a city university experience for the region (compared to 60% for the H&I overall). Almost half (46%) thinks it would help career aspirations (comparable to the regional average). A further 59% agree that the education-business-research links offer great opportunities for young people at the start of their careers, slightly below the regional average. In all, 48% would recommend it to others, compared to 52% regionally. Those in Elgin hold the strongest positive views on Inverness Campus, especially in terms of the education-research-business links being able to offer great career opportunities for young people and the offer of the Campus as a city university experience.

**Figure 3.4**



## Graduate placements

3.13 More than half the young people in Moray (54%) consider that undertaking a graduate placement would improve their chances of securing employment in the region (53% for the H&I), and although just 36% think there are a wide range of placement opportunities available, this is higher than the 31% regionally. Placement opportunities in more rural areas are perceived to be available by 31%, compared to 27% regionally. More also thought that placements were appealing (35% versus 30%). However, it is worth noting that more than one-fifth *did not know* whether there were sufficient opportunities available.

3.14 Awareness of the ScotGrad programme is slightly lower than the average across the H&I. The ScotGrad programme provides graduate and summer placements, and is designed to support business innovation, knowledge transfer and growth in the Highlands and Islands by assisting graduates with their career progression, as well as encouraging young people to stay in the Highlands and Islands, and overcome market failures around graduate recruitment and innovation, which tend to be particularly severe in remote rural areas. In all, 83% of respondents are unaware of the ScotGrad programme, above the 79% across the H&I. Awareness is highest in Elgin, where almost one in five is aware of the programme. A lower proportion than regionally have applied, with the rate of applicants at just over three per cent (5% regionally).

## **4 Working in Moray**

4.1 This section identifies what young people in Moray think about local employment and career progression opportunities, their ideal location to work, familiarity with and interest in H&I growth sectors, and characteristics valued most in employers. Again it seeks to draw out sub-area variations where these exist.

### **Employment-Related Factors in the Local Area**

#### **Opportunities for Apprenticeships**

4.2 More than half of those in Moray think there are good local opportunities for apprenticeships (51%), higher than the regional average of 49%. Opportunities are viewed most positively in Elgin (53% saying they are quite or very good), and slightly less so in East Moray (50%) and West Moray (48%). Those aged 15-18 are the most positive age group, with 53% rating apprenticeship opportunities as quite or very good, compared to 47% of those aged 19-24 and 44% of those aged 25-30.

#### **Personal Development Opportunities**

4.3 The proportion of young people in Moray rating opportunities for personal development as good or very good is lower (at 38%), although this is again slightly above the regional average (of 37%). The proportion reduces slightly with age, with these opportunities being rated positively by 39% of 15-18 year olds, 38% of 19-24 year olds and 32% of 25-30 year olds.

#### **Local Employment Opportunities**

4.4 Only around a third of Moray's young people rate the availability of local employment opportunities as good (35%) although this is in line with the regional average. This is slightly higher than average in both Elgin and East Moray (37%), whilst it is significantly lower in West Moray (25%). Young people become less optimistic about local employment opportunities with age/ life stage, with 37% of those aged 15-18 rating these positively, compared to 33% of those aged 19-24 and 31% of 25-30 year olds. Amongst school pupils, nearly four in 10 (39%) rate opportunities positively, compared to 31% of university/ college students and 32% of those in employment/ self-employment.

#### **Self-Employment Opportunities**

4.5 Fewer young people think there are good opportunities for self-employment, at around a third, and this is lower than the regional average (39%). Young people in West Moray (39%) and Elgin (37%) are more positive about self-employment opportunities than those in East Moray (29%). Optimism increases with age/ life stage as self-employment becomes more of an option as they get older/ gain experience of the world of work. In all, 30% of 15-18 year olds think opportunities are good, rising to 34% amongst 19-24 year olds and 47% of those aged 25-30.

#### **Opportunities for Career Progression Locally**

4.6 Less than a third are positive about opportunities for local career progression, although at 29% this is equal to the regional average. Young people in East Moray are slightly more positive about progression (35%), but this falls to 25% in Elgin and 23% in West Moray. Young people aged 15-18 are slightly more optimistic (31%) than those aged 19-24 (25%) and 25-30 (26%). Optimism about career progression is particularly low amongst university/ college students (19%).

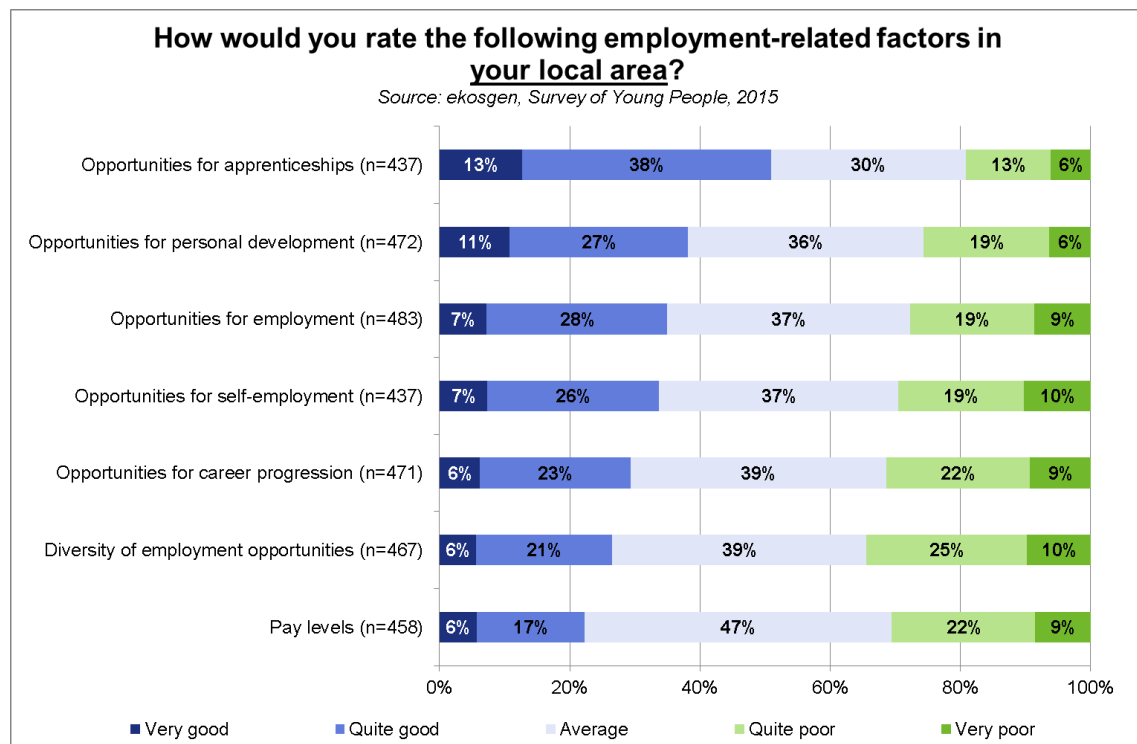
## Diversity of Employment Opportunities

4.7 Young people in Moray rate the diversity of employment opportunities in the local area the second poorest of all the employment related factors, with just 27% rating these positively. This is slightly below the regional average of 29%. Young people in Elgin and East Moray rate diversity of opportunity fairly similarly to the Moray average (28% and 27%) while those in West Moray are the most negative (21%).

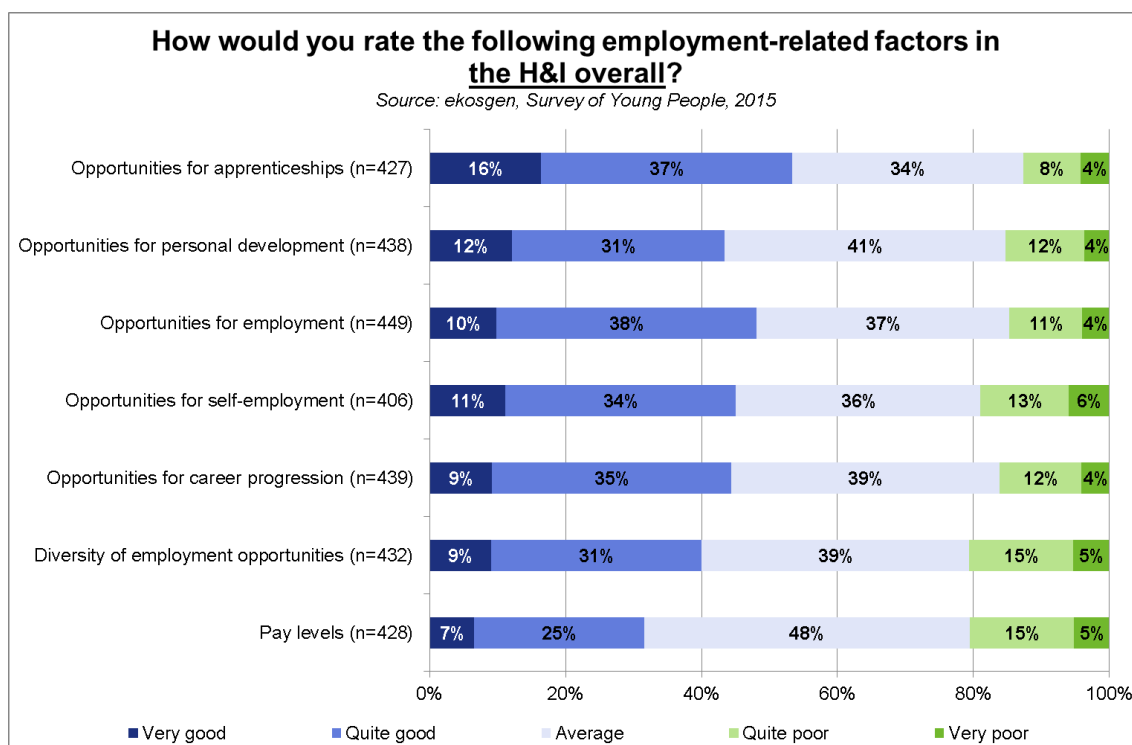
## Pay Levels

4.8 Pay levels are perceived most negatively of all the local employment factors by young people in Moray, with 23% viewing these positively, below the H&I average of 27%. Those in East Moray are slightly more positive (24%), whereas just 21% of those in Elgin and West Moray rate pay levels as good. Optimism about pay levels is lowest amongst 25-30 year olds (with 13% rating these positively in the local area). This increases slightly to 16% of 19-24 year olds and 27% of 15-18 year olds.

**Figure 4.1**



**Figure 4.2**



## Employment Related-Factors in the H&I

4.9 Young people in Moray rate all employment-related factors more positively in the H&I overall than they do locally. The differential is greatest for opportunities to progress careers (with 44% rating these positively in the H&I, compared to 29% locally), opportunities for employment (48% versus 35%), the diversity of employment opportunities (40% versus 27%) and opportunities for self-employment (45% versus 33%). The smallest differential is for opportunities for apprenticeships, where local opportunity at 51% is almost equal to the perceived availability across the H&I as a whole of 53%.

4.10 In all, 55% of young people in Moray agree that living in the H&I requires compromising on career opportunities, although this is lower than the 60% who think this across the region. Within Moray, this is slightly higher in West Moray (62%) and lower in Elgin (53%).

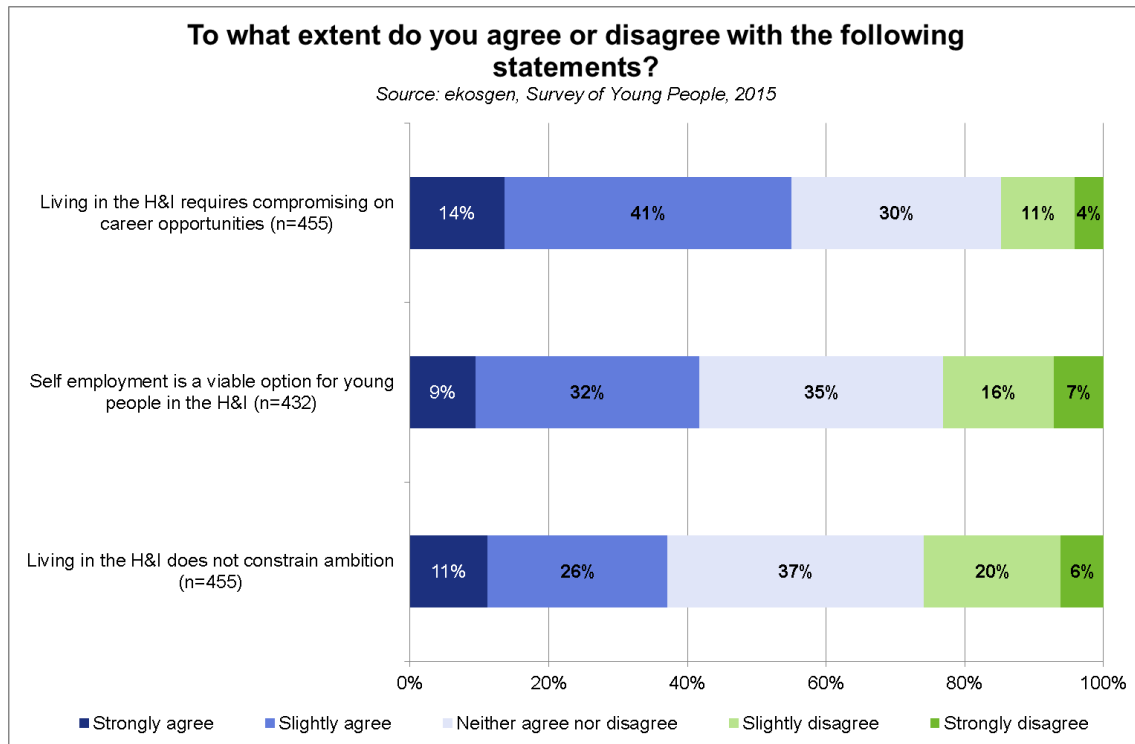
4.11 In Moray, those aged 19-24 are more likely to agree that living in the H&I requires compromise (65%) compared to 57% of 25-30 year olds and 51% of those aged 15-18. This view is more common amongst university/ college students (where 67% think compromise is required), compared to 53% of those in employment/ self-employment and 51% of school pupils.

4.12 Just over four in 10 young people in Moray (41%) agree that self-employment is a viable option in the H&I, which is below the regional average of 46%. In Elgin, views are in line with the regional average, while self-employment is seen as a less viable option in East and West Moray (both 38%). Those aged 25-30 years are most likely to agree (56%), compared to 37% of 19-24 year olds and 40% of those aged 15-18.

4.13 A slightly lower proportion thinks living in the H&I does not constrain ambition (37%), compared with 39% across the region. This is significantly lower in East Moray (29%) but much

higher in Elgin (44%) and in West Moray (40%). Young people aged 25-30 are more likely to agree that staying does not constrain ambition (41%), compared to 26% of 19-24 year olds and 27% of 15-18 year olds.

**Figure 4.3**



## Ideal place to work

4.14 Overall, nearly four in 10 (38%) young people in Moray would ideally like to work in the H&I, and this is six percentage points lower than the 44% for the region overall. Of these, 27% wish to work locally (compared to the regional average of 29%), and 11% elsewhere in the H&I. Although the proportion of young people wishing to live elsewhere in the H&I is marginally higher amongst those from West Moray (closest geographically to Inverness), there does not appear to be a particularly strong Inverness 'pull' effect for those in Moray.

4.15 In all, 30% would like to work in Scotland but outside the H&I (11% in the Central Belt, 7% in Aberdeen and 12% elsewhere in Scotland). The proportion wishing to work in Aberdeen is higher than the regional average of 3%, and this varies little across Moray. Just 8% would like to live elsewhere in the UK (broadly comparable to the proportion region-wide) and 23% would like to work elsewhere in the world (compared to 20% across the H&I).

4.16 Table 4.1 shows where young people would ideally like to work by sub-area. Those living in Elgin and West Moray have the strongest connection to the local area (with 37% and 35% respectively wanting to work locally), while just 17% in East Moray would like to do so.



**Table 4.1: Desired Place to Work by Sub-Area**

	Moray (n=508)	Elgin (n=186)	E.Moray (n=238)	W.Moray (n=74)
<b>Local area*</b>	27%	37%	17%	35%
<b>Somewhere in the H&amp;I</b>	11%	11%	9%	14%
<b>Central Belt</b>	11%	9%	13%	9%
<b>Aberdeen</b>	7%	6%	7%	8%
<b>Elsewhere in Scotland</b>	12%	13%	12%	7%
<b>Elsewhere in the UK</b>	8%	6%	11%	5%
<b>Elsewhere in the world</b>	23%	17%	28%	18%
<b>Other</b>	2%	0%	3%	4%

Source: *ekosgen, Survey of Young People, 2015*; \* current home town/village  
Please note, percentages may not sum due to rounding.

4.17 Those in employment or self-employment are most likely to want to work locally (52%) or elsewhere in the H&I (16%). School pupils are the least likely to want to work locally (14% compared to 17% regionally), or to work elsewhere in the H&I (9%, compared to 11% regionally), with greater proportions wishing to work elsewhere in the UK or elsewhere in the world (11% and 29% respectively). This pattern is typical of the responses across the H&I, with school pupils often being keen to work elsewhere – either temporarily or permanently – when they finish school, while those in employment/ self-employment are those most likely to want to remain in their current location.

4.18 Overall, the proportion wanting to work in their home area or somewhere else in the H&I generally increases with age/life stage. However, fewer wish to do so than regionally for all age groups, bar those aged 25-30.

4.19 Table 4.2 (below) compares those wishing to work locally to the proportion thinking there is good *diversity* of local employment opportunities, to give an indication of perceived supply of diverse jobs versus demand. Overall for Moray, the proportion wishing to work locally matches the proportion rating the diversity of employment opportunities positively, suggesting that those wishing to work locally can do so. At the same time, this is largely reflective of the fact that fewer young people are seeking to work locally than in many parts of the H&I.

4.20 In East Moray there is a 10 percentage point difference between those thinking there is a good diversity of employment and those who want to live there, reflecting the low level of desire to live locally, rather than a surfeit of opportunity. By contrast, in West Moray, over a third (35%) would ideally like to work locally, but just one in five (21%) rate the diversity of employment opportunities positively.

**Table 4.2**

Moray sub-area	Those ideally liking to work in their local area	Those rating diversity of employment opp's as quite or very good	Percentage point (pp) difference
Elgin	37%	28%	-9%
East Moray	17%	27%	+10%
West Moray	35%	21%	-15%
Overall Moray average	27%	27%	0%

Source: *ekosgen, Survey of Young People, 2015*.

## Views on H&I Growth Sectors

4.21 HIE's Operating Plan recognises that the region's natural assets, ambition, skills base and cultural background provide a range of opportunities to develop a vibrant sectoral

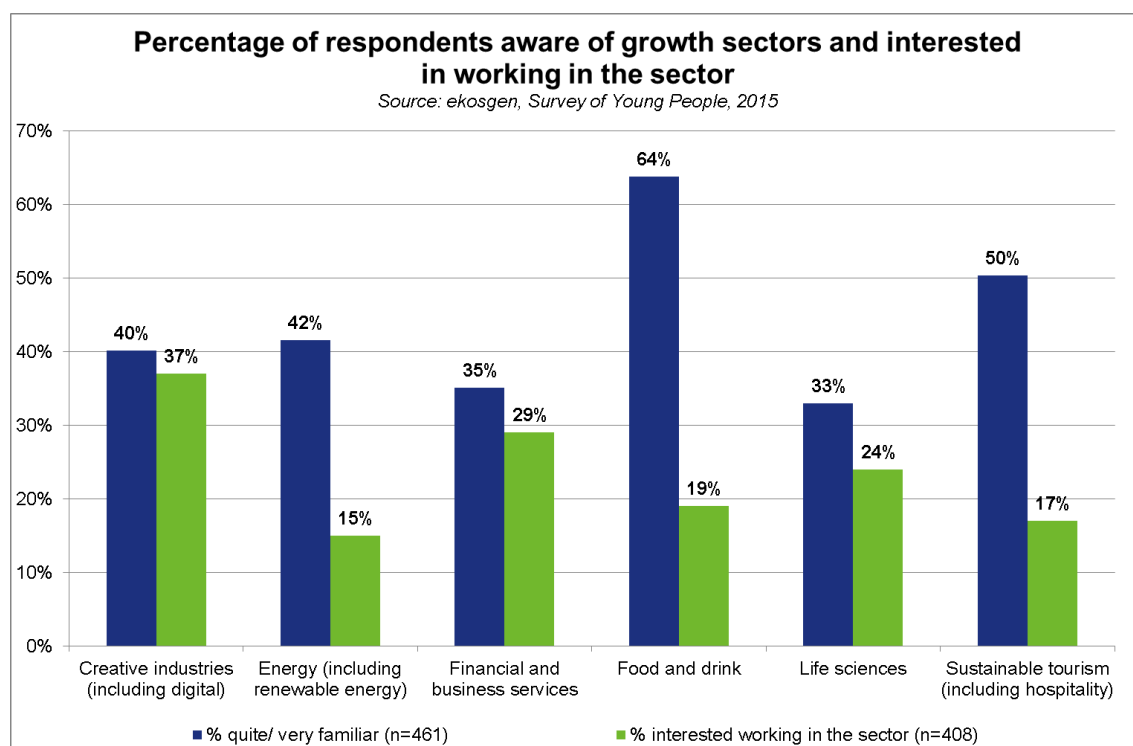
economy.<sup>22</sup> HIE's growth sectors - *Financial and business services; Creative industries (including digital); Sustainable tourism (including hospitality); Food and drink; Life sciences; and Energy (including renewable energy)* are aligned to the key sectors identified in the Scotland's Economic Strategy, but with key regional specialisms under each sector.

4.22 The most well-known sector in Moray amongst young people is Food and drink (64%, and 62% for the H&I), which has a strong presence locally, followed by Sustainable tourism (50%). Overall, awareness of growth sectors is generally higher in Moray than across the region, with the exceptions of Energy (42% in Moray compared to 45% across the region) and Sustainable tourism (50% versus 60%).

4.23 Creative industries is the most desirable sector to young people in Moray, with almost four in 10 (37%) expressing interest in working in the sector. This is followed by Financial and business services (29%) and Life sciences (24%). Less than a fifth would like to work in Food and drink (19%), Sustainable tourism (17%) or Energy (15%).

4.24 Figure 4.4 compares levels of awareness of growth sectors amongst young people in Moray with interest in working in the sector. The greatest disparities are in Food and drink (64% versus 19%) and Sustainable tourism (50% versus 17%), two key employment sectors in Moray.

**Figure 4.4**



## Desired Qualities in Employers

4.25 Views on what Moray's young people want from employers are broadly comparable to those across the H&I, the most important being a good work-life balance (important to 75% of young people in Moray and 74% across the H&I), followed by a commitment to staff development/ good training opportunities (72%, a little lower than the 76% regionally) and

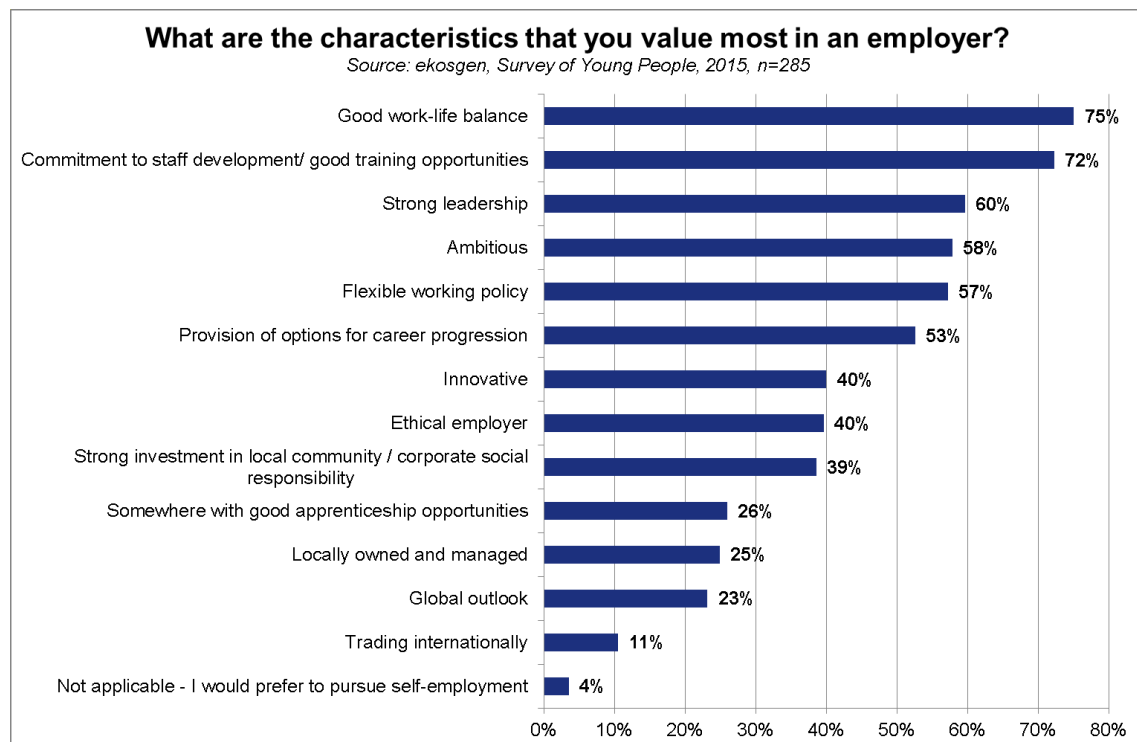
<sup>22</sup> HIE (2014) Building Our Future: Operating Plan 2014-2017

strong leadership (60% versus 57%). A slightly higher proportion also value an ambitious nature (58%, compared to 56%) and a flexible working policy (57%, versus 56%), while slightly lower proportions value the provision of options for career progression (53%, compared to 58%) and an innovative employer (40%, compared to 42%).

4.26 Ethical business practices are slightly less valued by young people in Moray than they are across the H&I overall, with 40% valuing an ethical employer, compared to 44% across the H&I; 39% a strong investment in the local community/ corporate social responsibility (compared to 44%); and 25% a locally owned and managed business (compared to 27%). A global outlook and an employer with international activities are least desired, and similar to the regional averages.

4.27 Respondents from East Moray are less likely to value an innovative employer (27%, compared to 41% in Elgin and 47% in West Moray), strong leadership (54%, versus 62% and 60% respectively), a good work-life balance (58%, versus 80% and 79%), flexible working practices (46%, compared to 60% and 58%) and the provision of options for career development (46%, compared to 51% and 61%). In contrast, young people in West Moray are less likely to value an ambitious employer (42%, compared to 63% in Elgin and 65% in East Moray), and more likely to value a locally owned and managed business (35%, compared to 22% and 23% respectively) and an ethical employer (50%, compared to 34% and 42% respectively).

**Figure 4.5**



## 5 Life aspirations in Moray

5.1 There are a range of other factors, beyond education and employment, which affect a young person's decision on whether to stay or leave Moray. These include housing, transport, mobile and internet connectivity, arts, leisure and culture and the strength of the local community. This chapter explores these issues and their relative importance. Any significant variations by sub-region within Moray are outlined in the analysis.

### Housing

5.2 As the overall H&I report shows, the lack of available and affordable housing is a significant issue for young people<sup>23</sup> and one that has risen in importance since 2009, relative to other factors. Whilst market conditions mean that housing has likely become an issue for young people more generally, housing availability and affordability are clear concerns for young people in the H&I.

5.3 Housing is also an issue for young people in Moray, and, whilst this is to a slightly lesser degree than in some areas, it is one that remains pronounced. Less than three in 10 (29%) consider there to be an appropriate choice of housing *to buy*, which is only marginally above the 26% who think so regionally. Over half (53%) disagree, compared with 57% across the H&I. Less than a third (32%) think there is a good choice of appropriate *rental* housing in the H&I, slightly higher than the 29% regionally.

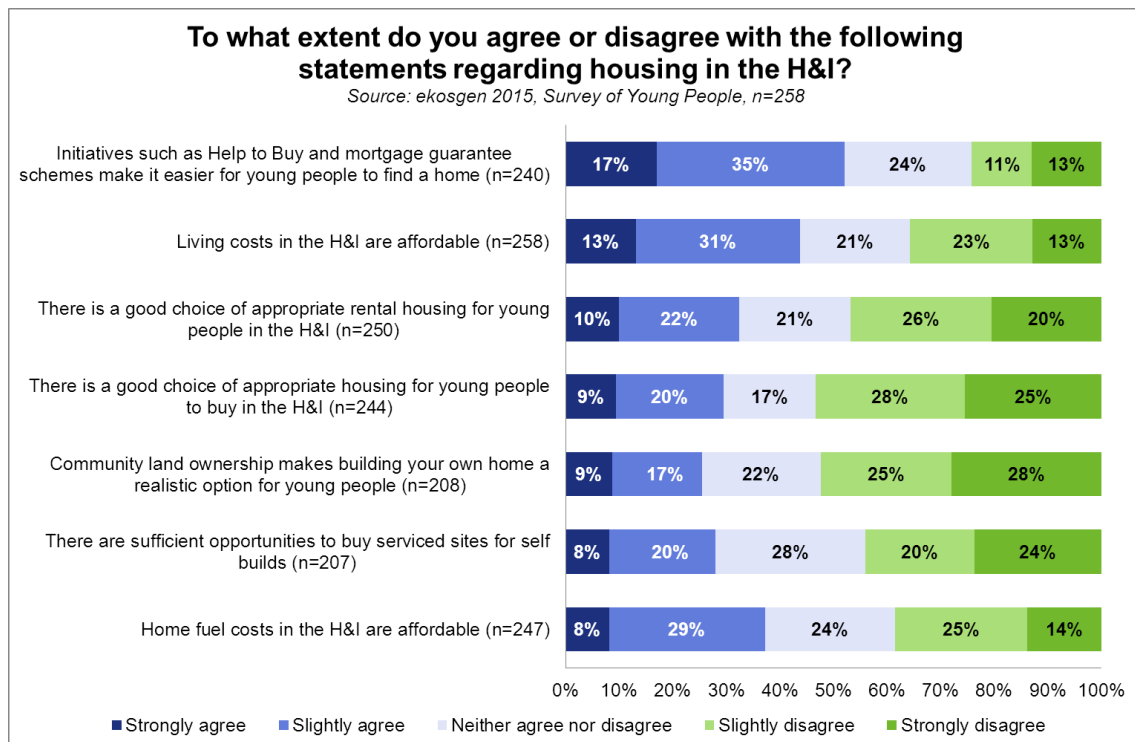
5.4 The cost of living is also an issue for young people in Moray, although slightly fewer think so than the regional average. A little over four in 10 (44%) believe costs are affordable, compared to 41% across the H&I. Living costs are perceived to be more affordable for those in East Moray (48%) compared to West Moray (44%) and Elgin (43%).

5.5 Almost three in 10 (28%) young people in Moray agree that there are sufficient opportunities to buy serviced sites for self-builds – higher than across the H&I (25%). A slightly smaller proportion, around one quarter, agree that community land ownership makes building your own home a more realistic option, marginally below those from across the H&I (28%).

---

<sup>23</sup> The Housing questions were only asked to those respondents via the main online survey, i.e. they were not asked in the schools paper and online surveys.

**Figure 5.1**



## Transport

5.6 Transport is an issue for young people in Moray, more so for those in the more rural parts (of West and East Moray) than for those from Elgin, principally in terms of bus affordability, rather than availability.

5.7 Availability of **bus** and **train services** are the highly rated by young people living in Moray, rated as good by 47% and 46% of young people respectively, the highest of all areas in the region, and well above the H&I averages of 40% and 35% respectively. Both modes of transport are deemed more available to young people from Elgin than to those from East and West Moray.

5.8 Both modes, however, are deemed *unaffordable* by young people from Moray. Less than three in 10 (28%) reported bus travel to be affordable, below the regional average (34%), and a quarter (26%) rated train affordability as good, slightly above the figure for the H&I as a whole (23%). This view is felt throughout the Moray area. The affordability of bus travel in Moray was an issue captured in the online discussion forums, as shown by the following quotes:

*'I think we need further local autonomy and to ditch the likes of [the current bus provider] who only care about profits'*

*'The trains are cheaper than the bus, enough said on that one'*

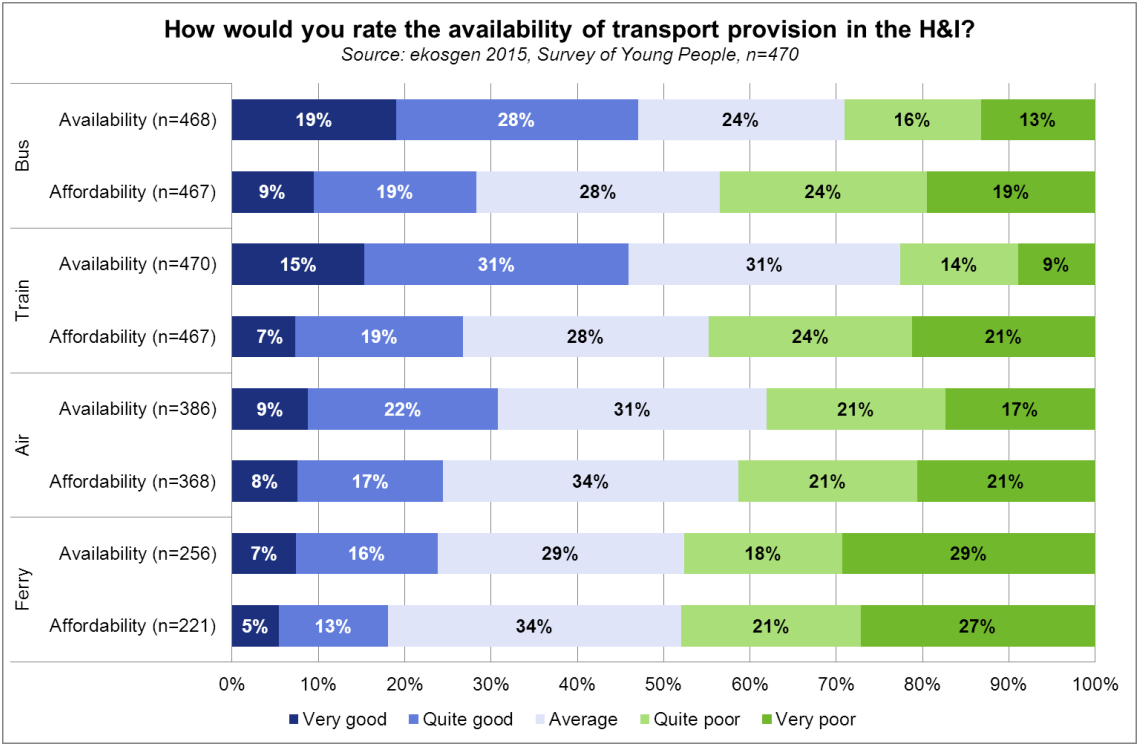
*'Timetable frequency, price and the service level of routes are all contributing factors and they could all do with being vastly improved'*

5.9 With international airports at Inverness and Aberdeen in relatively close proximity, the *availability* of **air travel** within Moray is rated as at least 'quite good' by more than three in 10 (31%) young people, and this is in line with the regional average. Air travel is slightly more available to those from Elgin (34%) than those in East Moray (28%). The *affordability* of air

services is rated poorly by over four in 10 (42%), although this is lower than the average for the region (53%).

5.10 **Ferry travel** is the least *available* (23%) and *affordable* (18%) mode of transport in Moray, and this is the lowest across the H&I, significantly below the region's averages (42% and 29% respectively). This reflects that sea-crossings are not required from Moray in the same way as other parts of the H&I.

**Figure 5.2**

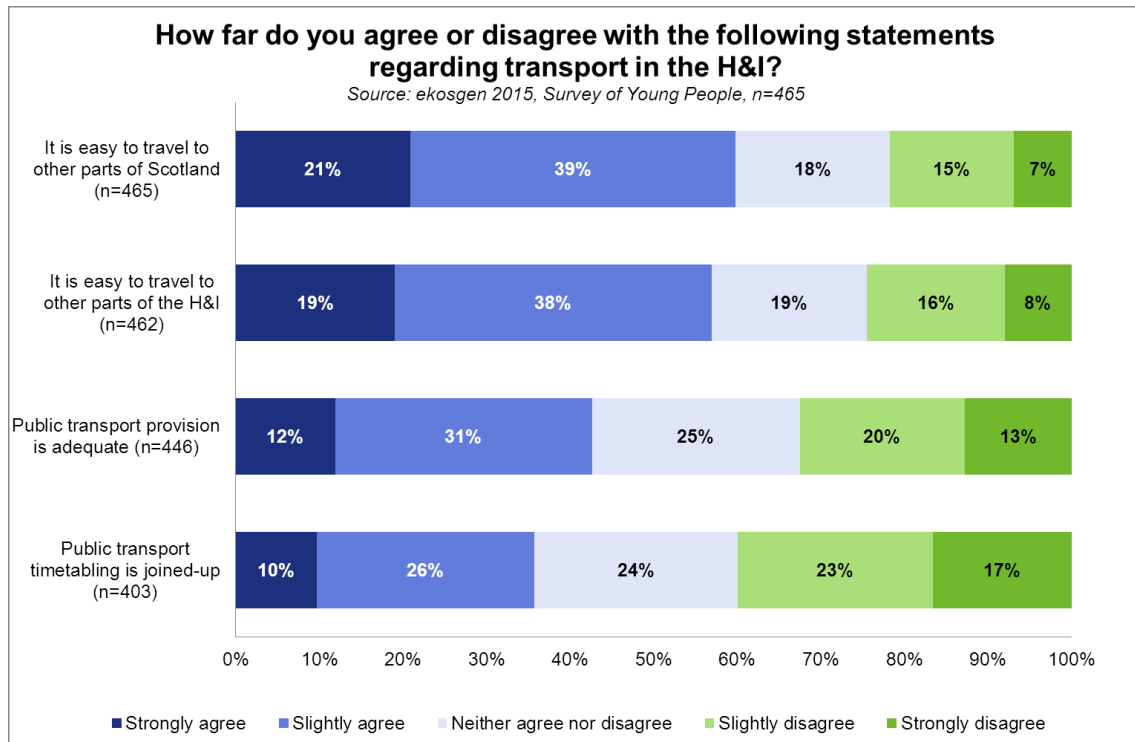


5.11 Some six in 10 (60%) young people surveyed agree that it is easy to travel to other parts of Scotland from Moray, above the regional average (56%). Further, a similar proportion agrees that it is easy to travel to other parts of the H&I (57%), highest in the region. Young people from Elgin feel more connected with both the H&I and Scotland (64% and 69%) compared to those living in East Moray (56% and 54%) and West Moray (45% and 55%).

5.12 Just over one third (36%) agree that public transport timetabling is joined-up, and some four in 10 (40%) disagree, and this is in line with the views of young people from other parts of the H&I. The view is consistent throughout Moray. In all, just over four in 10 (43%) young people agree that public transport provision is adequate, which is above the H&I average (40%). This is lowest in West Moray (36%).



**Figure 5.3**

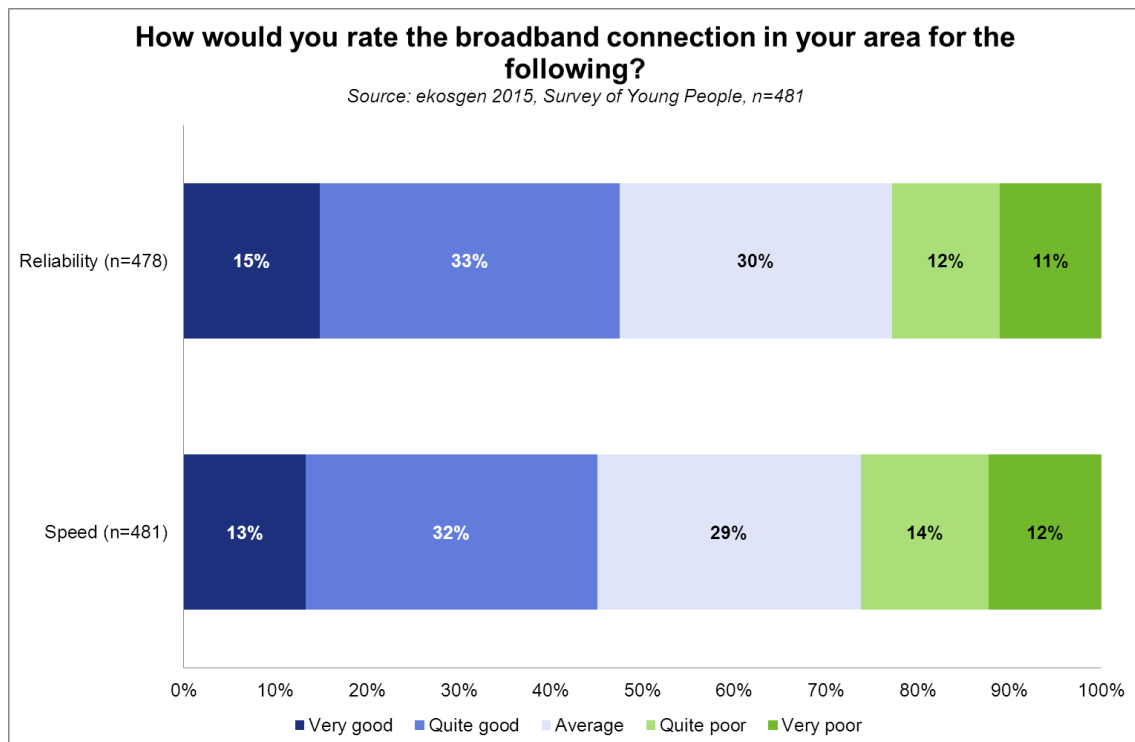


## Digital Connectivity

5.13 Moray is well connected digitally. Some 97% of young people in Moray at the time of the survey (April 2015) had access to broadband internet (standard broadband or NGA broadband), above the H&I average of 96%. Over a fifth (22%) had access to NGA broadband, the highest of all areas within the region, and well above the H&I average of 14%. This is set to rise further in the next 12-18 months with the roll out of NGA. At 55%, awareness of the NGA roll-out is in line with the H&I average (56%).

5.14 Broadband *reliability* in Moray rates favourably compared to other areas in the H&I, with almost half of young people rating it positively (48%, compared to the regional average of 43%), and less than a quarter (23%) rating it negatively. Further, 45% consider speeds to be good, the highest across the H&I region, although there is clearly still scope to increase this proportion. Broadband speed and, in particular, reliability are rated highest by young people from West Moray.

**Figure 5.4**

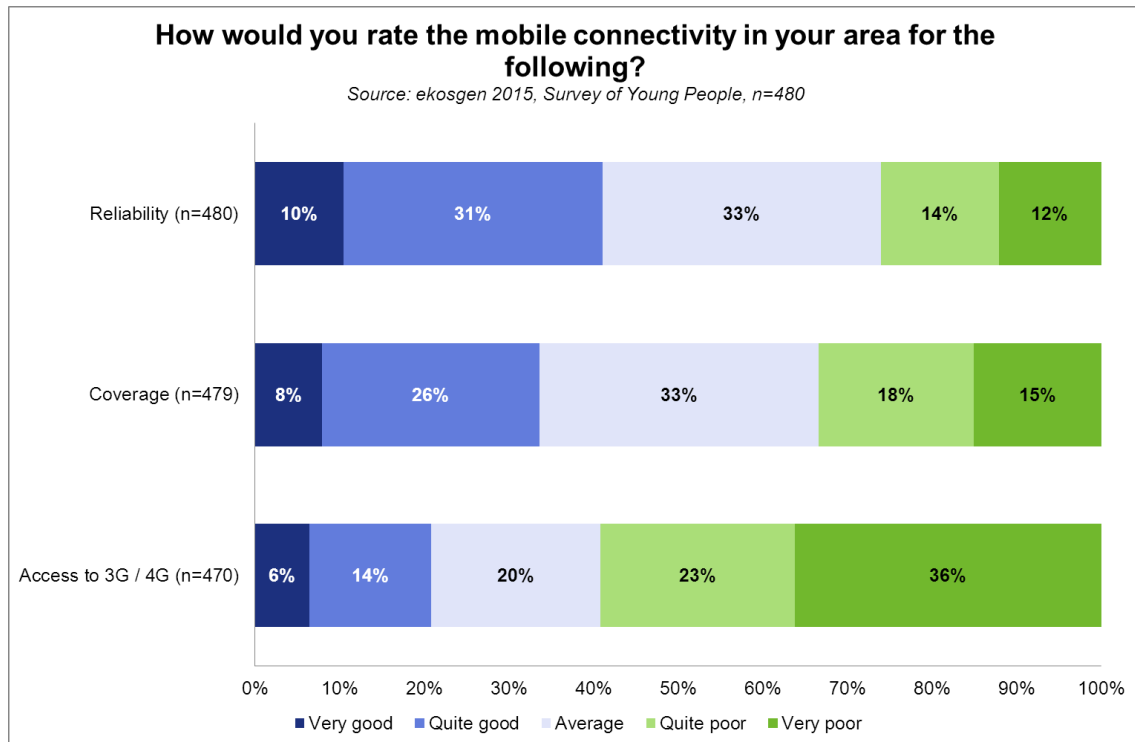


5.15 The top three key benefits of NGA broadband reported by young people in Moray were the same as for those across the H&I, although in a slightly different order, namely: 1) better music, film and entertainment streaming 2) better access to educational and learning materials and 3) improved communication with family and friends. The recognition of the benefits of NGA for education and learning is higher than in most other parts of the region.

5.16 Mobile connectivity is rated more poorly than broadband connectivity, albeit less so than in the rest of the region. In all, around four in 10 (41%) rate mobile *reliability* positively (compared to 35% across the H&I) and just over one third (34%) rate mobile *coverage* positively (compared to 29% regionally). Mobile reliability and coverage are rated slightly higher in West Moray.

5.17 Nonetheless, just over one third (36%) of young people rate access to 3G/4G as 'very poor', and, although this is well below the regional average of 47% (and the joint lowest in the region alongside the Inner Moray Firth), this remains an issue for young people in Moray. Access to 3G/4G is rated poorest in West Moray, where almost half (47%) describe it as 'very poor'.

**Figure 5.5**



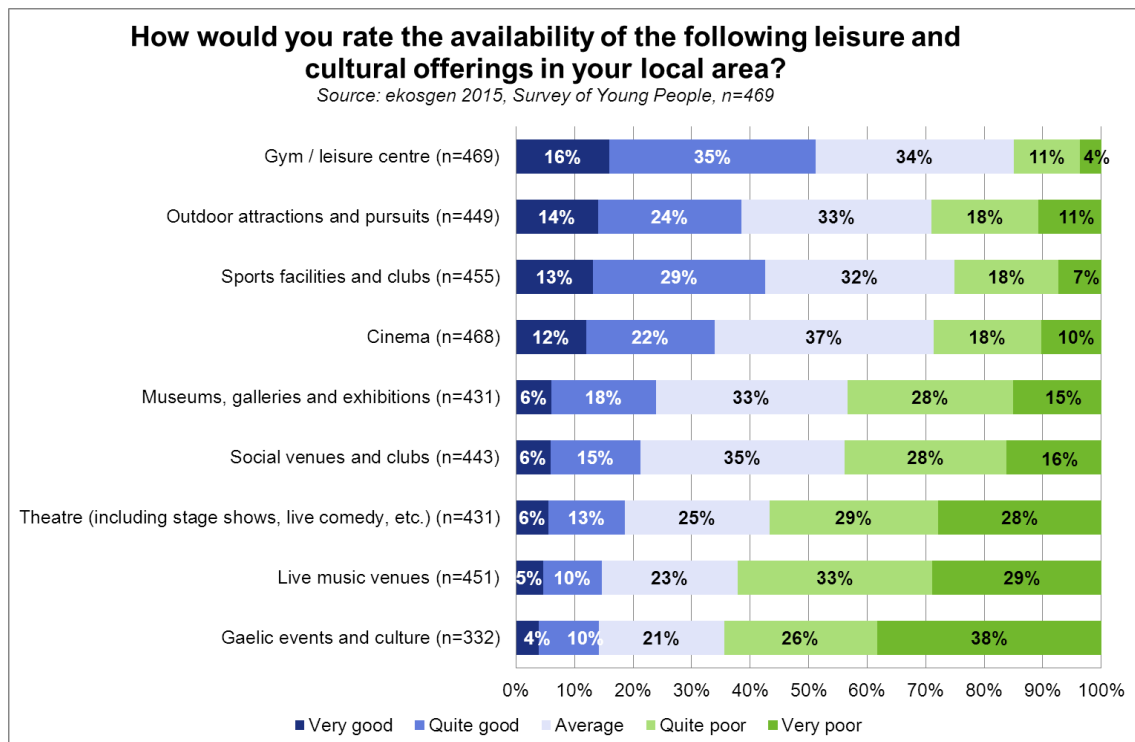
## Arts, Leisure and Culture

5.18 As with the H&I as a whole, there is a mixed picture on the perceived availability and strength of the arts, leisure and culture offer in Moray. In general terms, the offer is perceived to be far less available than in other parts of the H&I region.

5.19 The top three most available offers in Moray are gyms/ leisure centres (rated as quite or very good by 51% of young people), sports facilities (42%) and outdoor attractions and pursuits (38%), although all are lower than the regional averages. Access to museums, galleries and exhibitions (24%), social venues and clubs (21%), theatres (19%) and live music venues (15%) were rated the least available.

5.20 All arts, leisure and cultural offerings are deemed more available to those in Elgin than to young people in West and East Moray. Exceptions to this include live music venues and Gaelic events and culture, both regarded as more available in West Moray, and social venues and clubs which are more available in East Moray.

**Figure 5.6**



5.21 Young people were asked about the importance of these cultural offerings, and there was, on the whole, a significant mismatch between availability and importance. Gyms and leisure centres were most important to young people from Moray – 84% rating as important, whereas just over half (51%) rated these as available to them. The greatest disparities, however, occurred with live music venues (important to 74% and available to 15%), social venues and clubs (72% and 21%) and cinema (80% and 34%).

5.22 There was significant variation in the importance of cultural offerings within Moray. Young people in Elgin rated gyms/ leisure clubs as the most important offer (90%), followed by social venues and clubs and outdoor attractions (both 83%). Those from West Moray reported outdoor attractions and live music venues to be most important (both 85%), followed by gyms/ leisure centres (83%), while having good access to the cinema was most important to young people in East Moray (79%), followed by gyms/ leisure centres (78%) and sports facilities and clubs (71%).

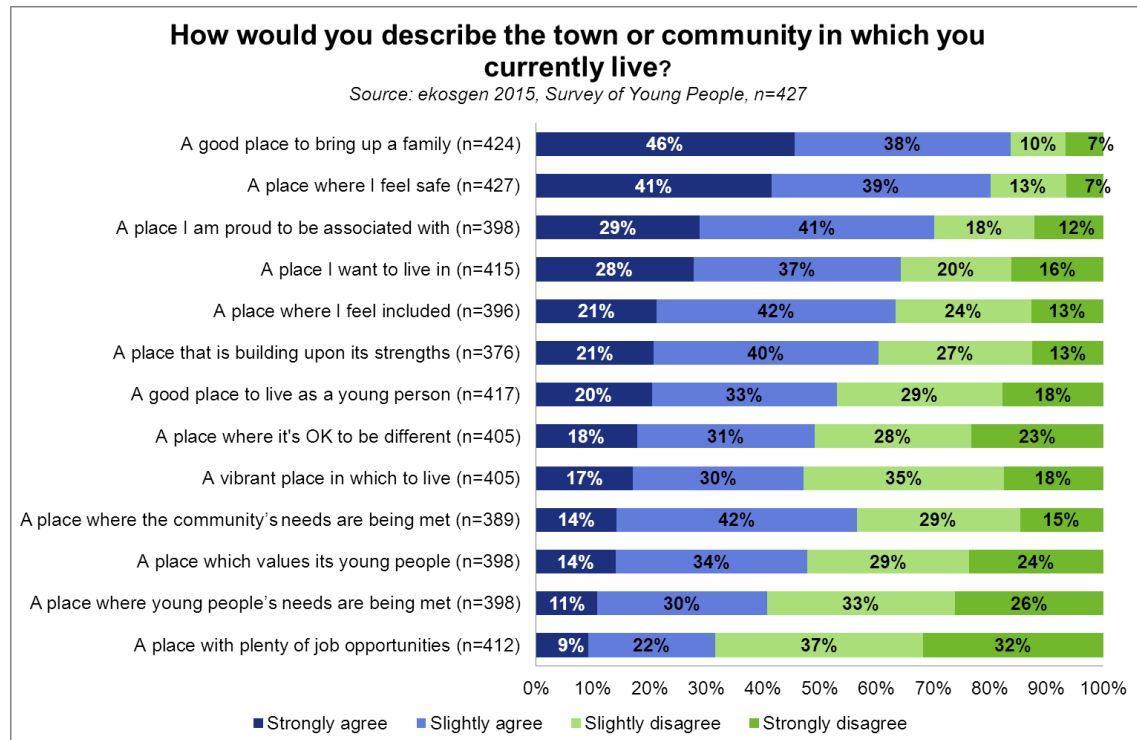
## Community

5.23 There are strong and positive feelings amongst young people from Moray about the place in which they live, although not quite as strong as elsewhere in the H&I. That said, seven in 10 (70%) are proud to be associated with their local community, even though this is the lowest of all the H&I areas and lower than the regional average of 78%. Within Moray, those from Elgin have the strongest sense of pride in their local community (76%) and those from East Moray the weakest (63%).

5.24 Over eight in 10 (84%) young people in Moray believe their local area is a good place to bring up a family, and a similar proportion (80%) feel safe in their local community. Although almost two thirds (63%) feel included in their local community, a smaller proportion agrees that it is a place where it is OK to be different (49%). Nearly a quarter strongly disagree with this, in line with the regional average.

5.25 Only a third of young people report their local community to be a place with plenty of job opportunities, and a similar proportion strongly disagrees with this. Over four in 10 (41%) in West Moray strongly disagree with this statement.

**Figure 5.7**



5.26 Around six in 10 young people in Moray are engaged with their community, although this is lower than the H&I average (71%). Almost three in 10 (28%) attend local community events (45% for the H&I as a whole), while around a quarter are members of local youth groups/clubs and undertake volunteer work for the community (compared with 32% and 31% respectively for the H&I). Around 40% do not participate in the community in any of these ways, and this is the highest rate of non-engagement throughout the region.

5.27 Against a number of indicators on local community, Moray is perceived positively, although slightly less so than in many other parts of the H&I. This includes being a place that is building upon its strengths (some six in 10 agree, compared to 63% for the H&I), being a good place to live as a young person (53% agree, compared to 59%), and being a place which values its young people (48% agree, compared to 53%). On the whole, those living in Elgin and West Moray perceive their local community more positively than those from East Moray.

## 6 Future aspirations of Young People in Moray

6.1 The previous chapters have explored the education, employment, and other lifestyle factors that affect the decisions made by a young person as to whether they leave or stay in Moray. This chapter looks at the relative importance of these various factors, as well as examining the future aspirations of young people living in Moray.

### Making Moray an Attractive Place to Live In

6.2 The top five most important themes for young people in Moray in making the region a more attractive place to live, work and study are the same as for the H&I as a whole, although ranked slightly differently. The two most important themes for Moray – the availability of high quality jobs (reported as *very* important by 69% versus 68% in the H&I), and opportunities for career progression (*very* important to 64%, equal to the H&I) - are also the two most important themes regionally. Having high quality jobs available is *the* most important theme in making the region more attractive to young people in all parts of Moray and highest in Elgin and West Moray.

6.3 Having good access to FE/HE (62% versus 61% for the H&I) is ranked as the third most important issue, higher than its ranking of four across the H&I, and particularly so amongst those from Elgin and East Moray.

6.4 Good access to housing is the fourth most important theme in Moray, reported so by 61% of young people, in line with the regional average. It ranks as the second most important issue to those from Elgin. The importance of affordable transport links in Moray (60%) is also in line with the H&I overall, and is the second most important issue to those in West Moray.

6.5 Overall, digital and mobile connectivity are slightly less significant issues for young people in Moray than elsewhere in the region, reflecting its greater availability and coverage. In all, 47% report mobile connectivity as *very* important, below the H&I average of 51% while 45% rank digital connectivity as *very* important, below the regional average of 48%.

6.6 Further, having affordable living costs (55%, compared to 56% for the H&I), available recreational and social opportunities (47%, compared to 50%), access to the outdoor environment (45%, compared to 48%) and vibrant communities (44%, compared to 47%) are slightly less significant to young people in Moray than in the H&I overall.

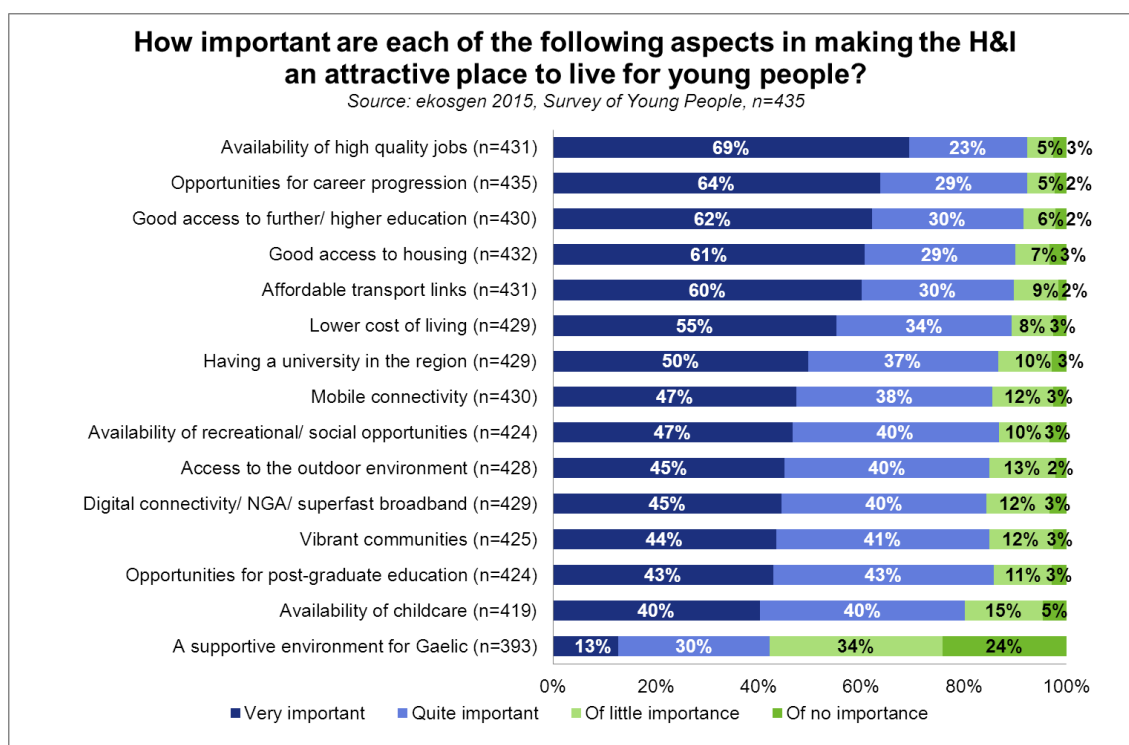
6.7 All of the 15 themes explored in the survey were reported as important for at least 80% of young people in Moray, and *very* important for at least 40%, with the exception of a supportive environment for Gaelic, although 43% considered this to be of some importance too.



**Table 6.1**

Theme	% 'Very Important'	Moray Ranking	H&I Ranking
Availability of high quality jobs	69	1	1
Opportunities for career progression	64	2	2
Good access to FE/HE	62	3	4=
Good access to housing	61	4	3
Affordable transport links	60	5	4=
Lower cost of living	55	6	5
Having a university in the region	50	7	8=
Mobile connectivity	47	8=	6
Availability of recreational/ social opportunities	47	8=	7
Digital connectivity	45	9=	8=
Access to the outdoor environment	45	9=	8=
Vibrant communities	44	10	9
Opportunities for post-graduate education	43	11	10
Availability of childcare	40	12	11
A supportive environment for Gaelic	13	13	12

**Figure 6.1**



## Future Aspirations

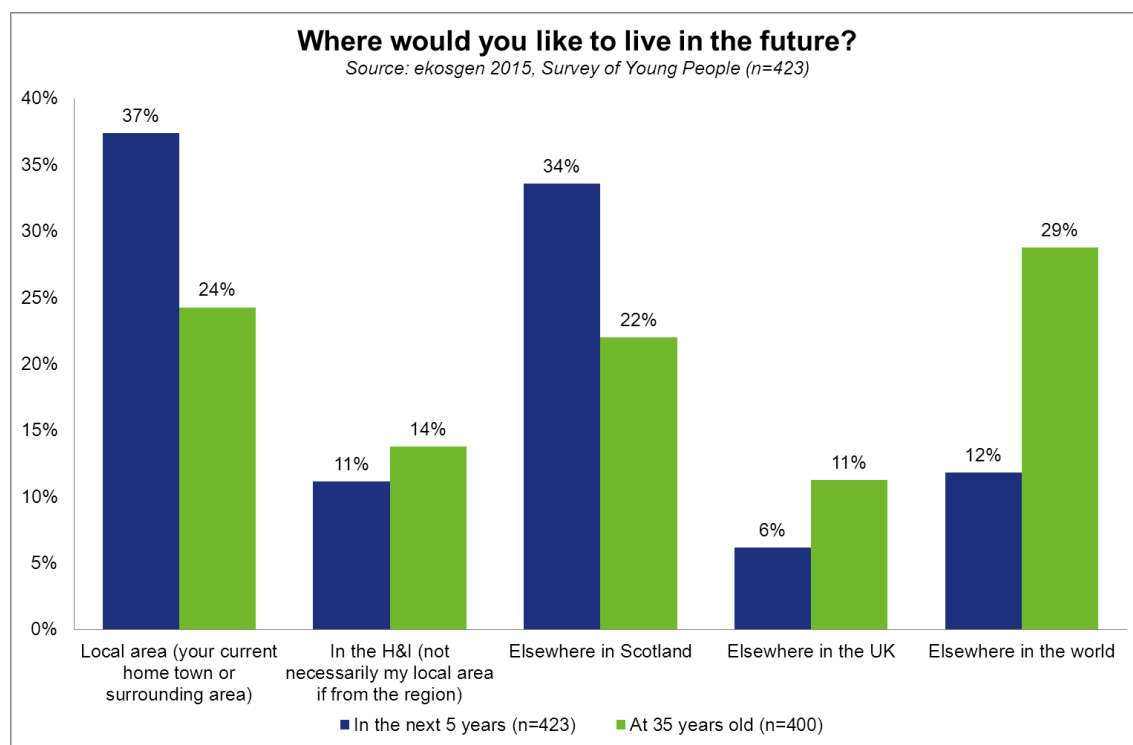
6.8 There is an aspiration amongst some young people in Moray to stay in their local area in the short term, but this falls markedly in considering the longer term. Nearly four in 10 (37%) want to live in their local area in five years' time, in line with the regional average (36%). However, less than a quarter (24%) would like to be doing so at the age of 35, this being well below the regional average (33%) and the lowest for the region overall.

6.9 For those in Elgin, the desire to stay in the local area in the short term (45%) is higher than in West Moray (37%) and East Moray (32%). In later life, however, the desire to be living locally is highest in West Moray (31%), compared to Elgin (29%) and East Moray (17%).

6.10 Around a tenth (11%) would like to live somewhere else in the H&I in the next five years' (12% for the H&I overall) making 48% in total that would like to live in the region in the short term (equal to the regional average). Slightly more, 14% would like to be living somewhere in the H&I at the age of 35, which is below the regional average of 18%. This means that 38% of Moray's young people would like to live in the H&I at the age of 35, significantly lower than the 51% for the region overall.

6.11 A large proportion of young people – around one third – wish to live elsewhere in Scotland in five years' time, and this is most prevalent for the 15-18 year age band (42%). This figure falls to 23% at 35 years old for this age group, meaning that of those who leave in the short term for educational purposes, some may return to their local area in later life, although many think they will be seeking opportunities outside Scotland.

**Figure 6.2**



6.12 Some nine in 10 (90%) young people from Moray either want to be in employment (43%) or studying/ furthering their education (47%) in the next five years. This future aspiration to be in education is the highest across the H&I. The desire to be in employment at 35 years old rises to 70%, above that for the H&I as a whole (66%).

6.13 A small but significant proportion of young people (7%) wish to be running their own business in five years' time, rising to over one fifth (21%) at 35 years old, broadly similar to the H&I averages (8% and 24%). This shows a certain appetite for self-employment within Moray, although greater proportions perceive there to be good self-employment opportunities than would actually consider taking up self-employment.

### **How the H&I has changed**

6.14 Despite Moray having a relatively low proportion of young people wanting to stay in the local area in later life, it has a high proportion (52%) of young people believing the H&I to be a better place to live now than it was five years ago, second only to the Inner Moray Firth. Around three in 10 (31%) were unsure, and just 17% did not think the region had improved. Positive change has been felt most strongly in Elgin (55%) and West Moray (51%), and less so in East Moray (41%).

6.15 There was less certainty about continued improvement in the region. Around four in 10 (42%) believe the region will be a better place to live in five years' time, below the H&I average of 46%. However, a greater proportion (44%) are unsure. Some 14% do not anticipate improvement, in line with the regional average. This masks considerable variations within Moray - those from West Moray (64%) and Elgin (62%) are much more optimistic about the future than those from East Moray (22%).

## 7 Conclusions

7.1 In all, 630 young people across Moray have given their views on their local area and the H&I. This is a good evidence base of what young people are thinking in relation to a whole range of issues. Young people across Moray are generally positive about their local area, although local attachments are not as strong as elsewhere in the H&I. There are challenges for the area in terms of the number and diversity of employment opportunities, and opportunities to progress, particularly in meeting the aspirations of Moray's young people.

### Key Summary Findings

#### Staying and Leaving

- More young people in Moray consider themselves to be committed leavers than regionally (45% compared to 40%). There are fewer committed stayers, and fewer reluctant leavers than the regional average. In part, this reflects the higher proportion of school age respondents from Moray who are most likely to see themselves as committed leavers.
- Those from East Moray are the most likely to be committed leavers, again influenced by the views of school pupils which are strongly represented in the sample there. Within the area, commitment to staying is highest in West Moray.
- Young people aged 19-24 are most likely to leave reluctantly, and at 16% this is above the regional rate of 12%. The same applies to university and college students. This will relate to the desire to move for FE/HE opportunities and the perceived lack of local employment opportunities.
- There are strong aspirations to go to university amongst school pupils from Elgin and West Moray. This aspiration is lower among those in East Moray, where higher proportions are seeking FE, an apprenticeship or employment and where factors such as entrepreneurship activities are relatively more important to post-school decisions.
- For those at school, there are stronger aspirations to go to Aberdeen, the Central Belt and elsewhere in Scotland than there are to go to elsewhere in the H&I, including Inverness. Alongside exam results, interesting college and university courses influence their post-school decisions, as does the range of school subjects at school (more so than elsewhere).

#### Education

- The H&I educational offering is well regarded by young people in Moray with more than six in 10 rating the offer as good (higher than the regional average). Almost seven in 10 feel they can study locally (highest in Elgin) and six in 10 think there is a wide range of FE courses available. HE opportunities are also rated as good by 56% (again higher than the regional average of 45%). This is positive feedback on the region's HE/FE offer.
- More than half consider there to be good opportunities to study remotely (above the regional average) and a greater proportion than elsewhere recognise the benefits of NGA for educational purposes and remote learning. That said, the proportion in East Moray believing they can study remotely falls below the regional average.
- The vast majority of young people (86%) know something of UHI, and views are typically more positive than elsewhere in the region. Those from Elgin are most positive, where more

than half think it has a credible academic reputation and more than four in 10 think it comparable to other universities in Scotland. In all, nearly six in 10 young people would be happy to attend, in line with the regional average.

- Awareness of Inverness Campus is below the regional average, and this falls with distance from it. In East Moray, just 31% are aware of the Campus development compared with 57% in West Moray. Nevertheless, views are generally positive, and more than six in 10 think it will offer a city university experience for the region. However, this is not (as yet) translating into a strong desire to go to Inverness for FE/HE.
- More than half of young people in Moray think graduate placements would help their job prospects and just over a third think there are a wide range of placement opportunities generally (above the regional average). However, awareness of the ScotGrad programme is low in Moray, less so than regionally.

## **Employment**

- In all, 35% of young people in Moray think local employment opportunities are good, and this is in line with the regional average. However, the lack of good local opportunities, and a lack of diversity in those opportunities, is an issue, emerging as the most important factor in making the H&I a more attractive place to live, work and study.
- Diversity of employment is rated as good by just 27%, slightly lower than the 29% regionally. Opportunities are perceived to be weakest in the areas outwith Elgin (both East and West Moray). Allied to this is a perceived lack of opportunities for career progression, rated as good by just 29%, although this is in line with the regional average.
- Pay levels are also perceived to be poor, and fewer think there are good pay levels than the regional average (23% versus 27%).
- As was evident in most other parts of the H&I, regional-level opportunities were perceived to be better than local opportunities. The exception is apprenticeships, where similar proportions consider both local and regional opportunities to be good. Fewer think there are good self-employment opportunities, and that this is a viable option, particularly locally.
- Fewer young people want to work locally (27%) in the future than the regional average (29%), and this falls to 17% in East Moray. Similarly, a lower proportion of school pupils in Moray want to work locally post-school, than is the case for their counterparts across the region.

## **Housing**

- Housing is an important issue for young people in Moray, with less than three in 10 considering there to be a good choice of housing to buy, and just 32% a good choice of rental properties.
- Almost three in 10 young people in Moray agree that there are sufficient opportunities to buy serviced sites for self-builds, higher than across the H&I (25%). A slightly smaller proportion, around one quarter, agree that community land ownership makes building your own home a more realistic option.

## **Transport**

- Bus and train travel are the most available forms of transport for young people in Moray, and their availability is rated as good by nearly half, well above the regional average, and highest for those in Elgin. However, less than three in 10 considers bus travel to be affordable (below the regional average).
- Young people in Moray (and those in Elgin in particular), feel more connected to both the rest of the region and to other parts of Scotland than the regional average. Just over a third feel public transport timetabling is joined up, lower than regionally.

## **Digital Connectivity**

- Moray is well connected digitally compared to most of the H&I, and 97% have access to broadband internet, including 22% with access to NGA, above the 14% regionally. Reliability is viewed as good by almost half (48%), which is five percentage points above regional average.
- Fewer rate mobile connectivity as good – 34% for coverage and 41% for reliability– although these are again, above the regional averages (29% and 35%). Along with the Inner Moray Firth, access to 3G/4G is the best across the region. Despite this, 36% think that access to ‘3G/4G’ is very poor, rising to 47% in West Moray.

## **Arts, Culture and Leisure**

- All nine arts, culture and leisure offers listed in the survey are perceived to be less available than regionally. The top three most available offers are gyms/ leisure centres, sports facilities and outdoor attractions and pursuits and these are the offers that young people consider to be most important.
- The greatest disparities in terms of availability and importance of offer relate to live music venues (important to 74% and available to 15%), social venues and clubs (72% and 21%) and cinema (80% and 34%). All nine offers are more available in Elgin than in other parts of Moray.

## **Community**

- Seven in 10 young people are proud to be associated with their local community, although this is below the regional average of 78%. Pride is strongest in Elgin and weakest in East Moray. Young people feel safe in their local area, and consider it to be a good place to bring up a family.
- There are good levels of community engagement, although this is again lower than regionally. A quarter are members of local youth groups/ clubs and undertake volunteer work for the community, compared to a third regionally. At 40%, levels of non-participation are the highest in the region.

## **Future Aspirations**

- Nearly four in 10 (37%) young people wish to live in their local area in five years’ time, in line with the regional average (36%), although this falls to a quarter by the age of 35 (the lowest in the region).

- Young people in Moray generally think that the H&I has improved over the last five years, and at 52% this is second only to the Inner Moray Firth. There is less certainty, however, over whether this will continue to be the case over the next five years.

## **Concluding Remarks**

7.2 Young people in Moray have a strong attachment to their local area, although this is less prominent than in other parts of the region. Generally there is slightly less desire to live locally, and more of an expectation to be living away, partly a result of a desire to study away. There are also some challenges with the number of employment opportunities locally and a relatively narrow employment base, particularly in the more rural areas, which can lead to weaker career progression opportunities and perceptions of low pay. There is low interest amongst young people in working in the sectors that have dominated the Moray economy, including Food and drink.

7.3 The picture is not universal, however, and there are indications of a stronger desire amongst those in Elgin (which also has the greatest cultural offer) to live and work locally. The FE/HE offer, both locally and across the H&I is generally well regarded by Moray's young people, and this includes positive attitudes to UHI and to the new Inverness Campus. Almost seven in 10 think they can study locally, well above the regional average. The Inverness 'pull' effect for education or employment, however, is not that evident despite relative geographic proximity.

7.4 There also remain some specific barriers to young people staying in Moray, including bus affordability and housing availability, although these are less severe than in other parts of the H&I. There is very good digital connectivity and recognition of the benefits of NGA for education and employment. Overall, however, there is a need to continue to diversify the local Moray economy and to increase the vibrancy and community spirit that exists in many other H&I areas and to capitalise on strong local attachments.



## A. Annex 1: survey response profile

This chapter provides an overview of survey respondents by age, gender, geography and status.

### Number of Respondents

In all, 630 young people from Moray responded to the survey (either online or through a paper version). This represents approximately 14% of the total survey sample and a strong confidence level of 95% with a +/-4% margin of error, based on an estimated 15-30 year old Moray population of 17,318.<sup>24</sup> This provides a robust survey sample and high reliability in the findings.<sup>25</sup>

### Age

Overall, 406 (64%) of those responding were aged 15-18 years, 131 (21%) were aged 19-24 years and 93 (15%) were aged 25-30 years at the time of completing the survey. Again, this provides a robust confidence level of at least 95% with a margin of error between +/-5% and +/-11%. School pupils make up 84% of the sample in East Moray, compared to 44% on average across the H&I.

Survey responses have a slightly higher level of representation for those ages 15-18 years as a result of the high response rate amongst school pupils. These additional school responses were the product of a targeted approach to gathering data from this age group, a crucial age at which young people make decisions about the future. As a consequence, the survey sample is slightly less representative of those aged 19-30 years.

**Table A.1: Moray Survey Response by Age and Representativeness**

Age group	Total (survey)		Moray		Difference (+/-)
	Number	Percentage	Number	Percentage	
15-18	406	64%	4,848	28%	+36%
19-24	131	21%	6,080	35%	-14%
25-30	93	15%	6,390	37%	-22%
Total	630	100%	17,318	100%	N/A

Source: *ekosgen, 2015, Survey of Young People; Census (2011)*. Percentages may not sum due to rounding.

### Gender

In all, 62% of respondents from Moray (385) were female, compared to 48% across the region. Nearly 37% were male (231) (compared to 52% across the area), while less than 1% of respondents (2) preferred not to say.<sup>26</sup>

<sup>24</sup> Census (2011) – area office breakdown provided by Highlands and Islands Enterprise.

<sup>25</sup> Please note that a small proportion of young people did not provide answers to all socio-demographic questions. So, while these young people are included in the overall responses, it was not possible to attribute them to age groups; thus, not all of the categories sum to the full 630 responses received.

<sup>26</sup> National Register of Scotland Mid-Year Population Estimates (2014). Please note, these percentages are based on the population aged 15-29 due to data availability issues

For both males and females, this again provides a high level of confidence at 95%, with a +/-5 % margin of error for females, and a +/-7% margin of error for males.<sup>27</sup>

## **Geography**

Respondents were asked to choose the area in which they live – the location of their current family home rather than a temporary residence used for study or short-term contracts. Within Moray, nearly half of respondents (47%) were from East Moray (288), almost four in 10 (234 – 38%) were from Elgin, and the remaining 16% (97) were from West Moray<sup>28</sup>.

## **Status**

More than half (54% - 339) of respondents were school pupils at the time of responding. Just over a fifth (21% or 130 people) were in employment or self-employment, and another 18% (112) were university college students.

Small numbers responding to the survey were undertaking an apprenticeship (20 people – 3%). 10 people were either unemployed or had finished education but were not currently in employment or unemployed (2%). Finally, four people (1%) were carers or home makers.

In comparison to the wider sample, respondents from Moray were more commonly school pupils at the time of responding, and were also slightly more likely to be undertaking an apprenticeship, unemployed or a person who has finished education but is not currently in employment. Respondents from Moray were just as likely to be university/ college students or carers/ home markers.

## **Summary**

In all, a high number of responses were received from young people in Moray across the region sub-areas. These responses provide good confidence in the results by age, geography and gender, providing a robust data-set for analysis.

---

<sup>27</sup> National Register of Scotland Mid-Year Population Estimates (2014). Please note, these percentages are based on the population aged 15-29 due to data availability issues

<sup>28</sup> Please note, this is based on the respondents' postcode. There were 11 individuals that it was not possible to determine the sub-area for.

