

ENABLING THE NEXT GENERATION

Young People and the Highlands and Islands
Maximising Opportunities:
INNER MORAY FIRTH



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HEADLINE FINDINGS

Staying and leaving

- Almost half of young people in the Inner Moray Firth (49%) are committed stayers, up from 43% in 2015. The proportion of committed leavers has fallen although it is still higher than the regional average. Those from south of Inverness are more likely to identify as committed stayers, while Inverness and Nairn has a higher than average proportion of committed leavers.
- While around half of young people from the Inner Moray Fifth see themselves living somewhere in the region in future, they are amongst the least likely to want to live locally.
- Perceptions of leavers and stayers post-school are mainly positive although fewer are felt to stay because of strong links with their home area and the feeling remains that young people must leave to get on in life.

Education

- Views on the FE/HE offer in the region have improved since 2015 amongst young people in the Inner Moray Firth, particularly the affordability of study and opportunities to learn remotely. However, fewer respondents from south of Inverness feel that there are good opportunities to learn remotely or that studying in the region is affordable to them.
- As across the region overall, more needs to be done to raise awareness and increase access to modern, foundation and graduate apprenticeship opportunities.

Employment

- Young people from the Inner Moray Firth are less likely than regionally to cite barriers to achieving their employment goals and to report a lack of employment opportunities in their local area.
- A lack of local opportunities, housing and transport are more significant barriers to those living outwith Inverness and Nairn, even more so to those living south of Inverness than to those in Easter Ross.
- Most young people in the Inner Moray Fifth agree that the employment factors they are looking for are available in their local area and regionally. However, those from south of Inverness and Easter Ross are more likely to view opportunities as being outwith their local area.
- The proportion of young people from the Inner Moray Fifth who want to work in the Highlands and Islands has increased since 2015 (from 45% to 63%), although they are less likely than average to want to work in their local area, and more likely to want to work elsewhere in the region.

Community and Culture

- Community participation is lower among young people from the Inner Moray Firth than anywhere else in the region, although it is relatively high amongst those living south of Inverness.
- Views on their local town/community are positive, broadly reflecting regional averages. Safety, quality of life and family friendly living are key attributes and levels of pride have increased. However, fewer than in 2015 feel that their needs are being met. Those living south of Inverness and in Easter Ross are less likely to feel their local town/community is a good place to live as a young person.
- Young people from the Inner Moray Fifth are less likely than regionally to perceive lack of availability as a barrier to accessing arts, leisure and cultural activities though cost was typically an issue.

Maximising Opportunities

- While young people from the Inner Moray Firth are the least likely of all areas in the region to think that people must make compromises to live in the Highlands and Islands, most still perceive them as necessary, particularly those living south of Inverness.
- These young people are less likely to identify access to events, services and amenities and digital, and mobile and transport connectivity as areas of compromise. However, they are as likely as regionally to report employment-related compromises.
- Similar to elsewhere in the region, key economic and social priorities for young people in the Inner Moray Firth are focused on employment opportunities, housing and good quality of life.

1 INTRODUCTION

1.1 In 2018, Highlands and Islands Enterprise (HIE) commissioned ekosgen to undertake a major research study focused on the changing attitudes and aspirations of young people aged between 15 and 30, in relation to living in the Highlands and Islands. The study builds on similar research undertaken by HIE in 2015 and explores how opportunities in the region can be maximised for all young people to live, work and study in the Highlands and Islands¹.

1.2 This report presents the findings of young people from the Inner Moray Firth who participated in the research. It provides comparisons with the results for the Highlands and Islands overall and findings from the 2015 study. Where possible, analysis is provided for young people living in different parts of the Inner Moray Firth – *Inverness and Nairn*, *Easter Ross* and *south of Inverness* – highlighting where their views differ.

RESEARCH STUDY APPROACH

1.3 The research study consisted of an in-depth survey of young people both within and outwith the Highlands and Islands, coupled with a programme of online focus groups with young people. These were supported by a social media engagement campaign to foster interest and engagement in the research. A broad programme of consultation with stakeholders across the region was also undertaken to explore the perspectives of employers, policy-makers and key groups in relation to the study. Additionally, desk research around regional and national policy aimed at population growth and talent attraction was carried out alongside socio-economic profiling and data analysis of young people in the Highlands and Islands and its sub-regions.

1.4 In total 1,193 young people from the Inner Moray Firth participated in the research, of which 60% (719) are from Inverness and Nairn, 33% (396) are from Easter Ross and 7% (78) are from South of Inverness. In terms of age, 29% of the respondents are 15-18 years old, 38% are 19-24 and 31% are aged 25-30. Just under 70% of respondents are female, whilst 30% are male.

RESEARCH QUESTIONS

1.5 The study has two principal aims. The first is to provide an overview of the evolving attitudes and aspirations of young people in the Highlands and Islands and how these have changed since 2015. The second is to identify gaps in the current provision of education, training and employment and to consider how these can be addressed so that opportunities can be maximised for all young people. The research was designed to address the following objectives:

- Provide a socio-economic profile of young people in the Highlands and Islands overall, and of its sub-regions;
- Provide a brief overview of key regional and national policy initiatives designed to support population growth and talent attraction strategies;
- Track how the attitudes and aspirations of young people have changed, if at all, since the previous study was undertaken in 2015;
- Explore provision of and attitudes to education, training and employment opportunities across the region, identifying gaps, areas of inequality, and good practice examples; and
- Identify areas and specific points for consideration in terms of how to better position the Highlands and Islands as a place where young people want to live, work and study. Further policy interventions may be required to support this.

¹ The 2015 research is available at www.hie.co.uk/young-people-research and 2018 findings at www.hie.co.uk/yp-research

2 THE INNER MORAY FIRTH CONTEXT

INTRODUCTION

2.1 This chapter provides an overview of the social and economic context of the Inner Moray Firth. It includes a general overview of the area and its main centres, population and migration trends, the educational offer and employment trends.

OVERVIEW OF THE INNER MORAY FIRTH

2.2 The Inner Moray Firth covers a large geographic area of approximately 8,060km², from Ross-shire in the North to Badenoch and Strathspey in the south. With a total population of 157,934 in 2018, it has a population density of approximately 20 inhabitants per km². Some parts of the Inner Moray Firth are economically and socially more connected to the Central Belt than others.

2.3 The Inner Moray Firth is split into the areas of Inverness and Nairn, Easter Ross and south of Inverness. With a population of just under 75,000, the Inverness and Nairn area accommodates almost half the overall population. Most of these (around 60,000 or about 40% of the Inner Moray Firth population) live in the Highland capital Inverness, the region's only city. Easter Ross sits north of Inverness and borders Wester Ross and Sutherland. Its main towns are Alness and Dingwall, with populations of around 6,000 and 5,500 respectively. The area to the south of Inverness is sparsely populated with the largest population centres being Aviemore (3,300) and Grantown-on-Spey (2,500).

2.4 Inverness is the key hub for public transport in the Highlands and Islands, connected with the rest of Scotland by major trunk roads, rail and air services. The main road through the area is the A9, running from the central belt as far north as Scrabster on the north coast. The A96 connects Inverness with Aberdeen. Work is ongoing to dual both roads, improving road safety, journey times and reliability. Inverness Airport offers national and international connections, with 138 flights per week including to London airports and a daily connection in to the international hub at Amsterdam. Rail links from the central belt stop to the South of Inverness, including Aviemore and Kingussie, whilst services travelling to Aberdeen stop at Nairn. The northern line from Inverness to Wick makes stops in Easter Ross including Alness, Invergordon and Tain.

2.5 Being the capital of the Highlands, Inverness is also the central area for leisure amenities and facilities, offering town centre shopping, a shopping centre, cinemas, music venues, theatres and leisure centres. The area is also home to world-famous attractions such as Loch Ness and the Cairngorms National Park as well as the picturesque coastlines of the Beauly, Cromarty and Moray Firths.

2.6 The range of businesses in the area is diverse. Renewable energy, tourism, food and drink and creative industries all play a role, as does the service sector. Inverness is developing as a centre for life sciences, with LifeScan Scotland, Scotland's largest life sciences employer, based there. Inverness Campus, developed by HIE, is a centre for learning and research, supporting collaborative working between the public, private and academic sectors.

SOCIO-ECONOMIC PROFILE²

Population and migration trends³

2.7 The Inner Moray Firth's population of 157,934 in 2018 accounts for around one-third (34%) of the total population of the Highlands and Islands. Of this 17% (26,955) were aged 15-30, higher than the proportion across the Highlands and Islands overall (16%), but below the 20% nationally. Between

² In this section, data for the Highlands and Islands and/or Highland has been used where it is not available at sub-regional level (i.e. for the Inner Moray Firth).

³ Data in this section is from the following National Records of Scotland (NRS) publications: Small Area Mid-Year Population Estimates 2011 and 2018, Migration to and from Scotland 2017-18 and Sub-National Population Projections (2016 based).

2011 and 2018 the number of 15-30-year olds in the Inner Moray Firth decreased by 4.2%, whilst the total population grew by 2.7%.

2.8 Across the Highland Council area (Highland) there was a total net in-migration in 2017-18. However, there was a net out-migration of young people aged 15-19. In addition, the number of 15-30-year olds living in Highland is projected to fall by 10% between 2018 and 2041. This is below the decline projected regionally (-13%) but higher than that expected nationally (down 6%).

Education

2.9 School leaver attainment in the Highland Council area tends to be below the national average. The majority (96%) of school leavers in 2017/18 went on to positive destinations (94% nationally). School leavers in Highland were less likely than nationally to go on to Further or Higher Education (20% and 35% respectively compared to 27% and 41% across Scotland). However, as with elsewhere in the region they more likely to go into employment (37% versus 23% nationally)⁴.

2.10 Further and Higher Education (FE and HE) provision in the Inner Moray Firth is delivered through Inverness College UHI, which provides a variety of courses across a range of subjects including postgraduate and undergraduate degrees, HNDs, HNCs and SVQ courses. Inverness College is based at Inverness Campus and in 2016/17 just over 2,000 students were enrolled at the College.

2.11 In 2017-18 there were approximately 8,000 HE and 11,000 FE students from Highland studying at universities or colleges in Scotland. The majority (83%) of FE students from Highland are studying within the Highlands and Islands, with most enrolled at institutions within the Highland Council area (81%). This mirrors the regional trend, with 80% of FE students from the Highlands and Islands studying within the region. FE students from Highland aged 20-24 were more likely to be studying outside the region than those aged 16-24 or 25+ (24% compared to 16% and 20% respectively).

2.12 Around half (51%) of HE students from Highland were enrolled at institutions outside of the Highlands and Islands, slightly lower than the regional average (54%). Just under two-fifths (38% versus 34% overall) were studying in the region, most (36%) within the Highland Council area. Around one in ten (11%) were undertaking Open University learning (12% across the Highlands and Islands overall)⁵.

2.13 Younger HE students from Highland were more likely to be studying outside of the region than older students - 62% of those aged 16-19 and 66% of those aged 20-24 are doing so compared to 28% of those aged 25+. The latter were more likely to be studying locally (46% compared to 32% of 16-19-year olds and 28% of those aged 20-24) or through the Open University (22%, 4% and 5% respectively).

Employment and economic activity⁶

2.14 Employment and economic activity rates in the Inner Moray Firth tend to be above both the regional and national rates. In 2018 the employment rate in the Inner Moray Firth was 81.7%, compared to 78.9% across the Highlands and Islands and 74.1% across Scotland. The economic activity rate was 83.3%, compared to 81.3% regionally and 77.4% nationally. Similarly, the employment and economic activity rates for 16-24-year olds (78.4 and 80.4 respectively) were above both the regional (67.1% and 71.6% respectively) and national (57.2% and 63.3%) rates.

2.15 While data is not available for those aged 16-24 in the Inner Moray Fifth area, the unemployment rate for the working age population in the Inner Moray Fifth (1.9%) was lower than both the regional (2.9%) and national (4.3%) averages. The overall economic inactivity rate was also comparatively lower (at 16.7% compared to 18.7% regionally and 22.6% nationally). Reflecting this, the economic inactivity rate for those aged 16-24 (19.6%) is also below the rates for the Highlands and Islands (28.4%) and Scotland (36.7%).

⁴ Scottish Government School leaver attainment and initial destinations: statistics, 2017-18

⁵ Analysis is based on data from the Scottish Funding Council for 2017-18

⁶ Data in this section is from the Annual Population Survey January to December 2018.

3 KEY FINDINGS FOR THE INNER MORAY FIRTH

INTRODUCTION

3.1 This chapter provides the key findings from the survey of young people from the Inner Moray Firth. As with the region-wide report, it looks at attitudes around staying and leaving, education, employment, community and culture and maximising opportunities. It focuses mainly on where there are differences in the views of young people from the Inner Moray Firth compared to the regional average, or variations between those living in different parts of the Inner Moray Firth.

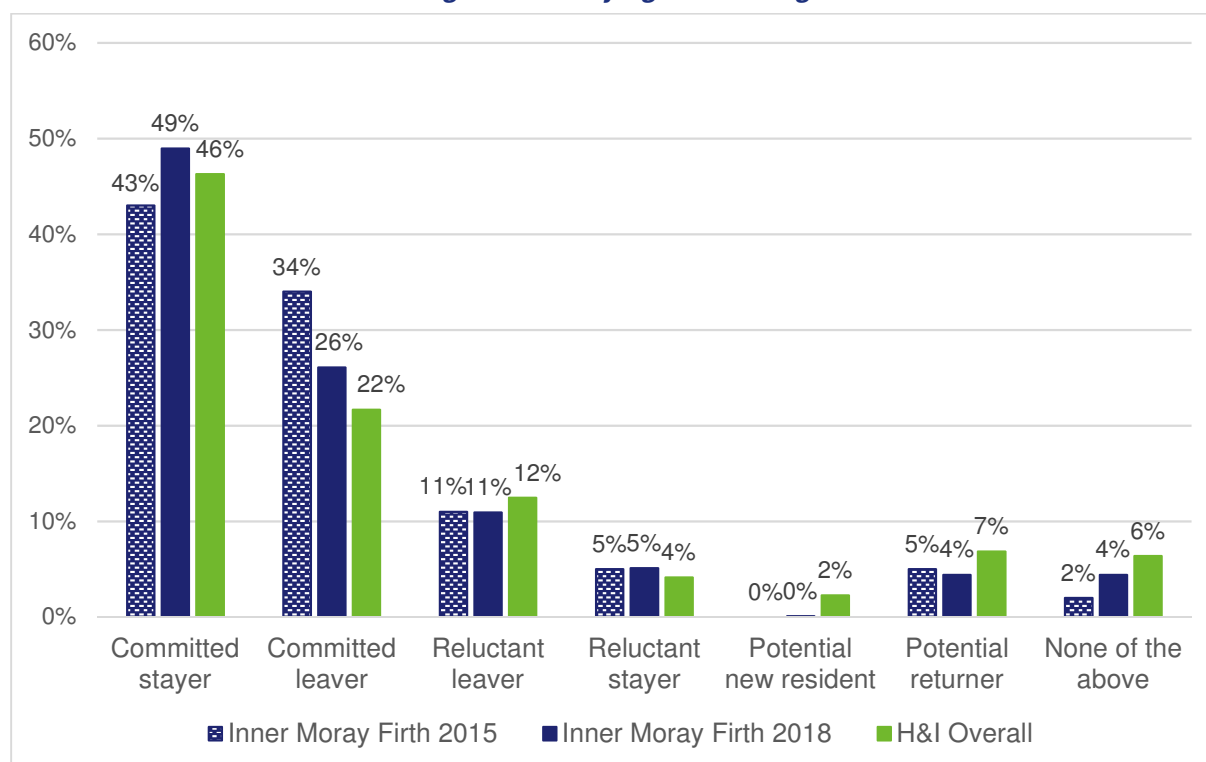
STAYING AND LEAVING

3.2 Young people from the Inner Moray Firth are more likely than their peers across the region overall to plan to stay in the Highlands and Islands - 49% identify as committed stayers, compared with 46% regionally (Figure 3.1). This is an increase of six percentage points from 43% in 2015.

3.3 More also identify as committed leavers (26% compared to 22% regionally). However, this has fallen markedly from 34% in 2015, reflecting the decline seen regionally (down 12 percentage points).

3.4 Within the Inner Moray Firth, young people from south of Inverness are most likely to identify as committed stayers (63% do so compared with 50% from Easter Ross and 47% from Inverness and Nairn). Young people from Inverness and Nairn are most likely to plan to leave the region (28% compared to 25% in Easter Ross and 18% of those living south of Inverness).

Figure 3.1: Staying and leaving

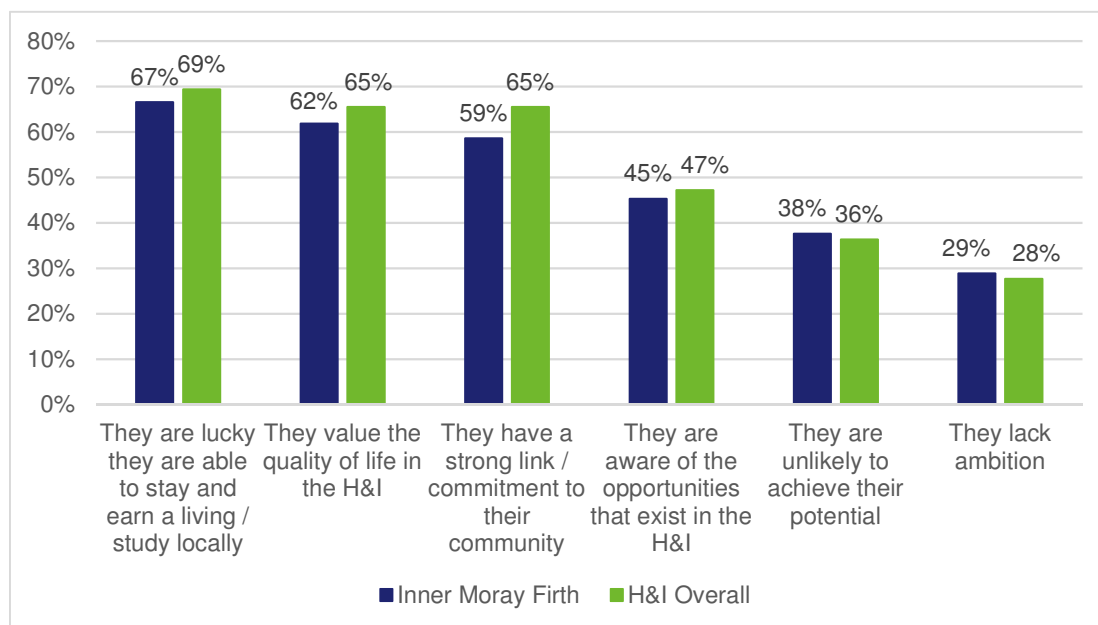


Source: ekosgen survey of young people, 2018 (Overall n=2,539, Inner Moray Firth n=997)

3.5 Around half (51%) of young people from the Inner Moray Firth see themselves living in the Highlands and Islands in 10 years' time (compared with 55% regionally) – 26% in their local area and 25% elsewhere. Along with those in Argyll and the Islands (25%), they are the least likely of all areas in the region to want to live in their local area in the future (32% do regionally).

3.6 Views of young people in the Inner Moray Firth on those who stay in the local area post-school broadly reflect those seen regionally, although they are less likely to feel that those who stay have a strong link/commitment to their local area (59% compared to 65% regionally) (Figure 3.2). Around two-thirds agreed that young people who stay are lucky to be able to do so (67%) and 62% that they value the quality of life in the Highlands and Islands.

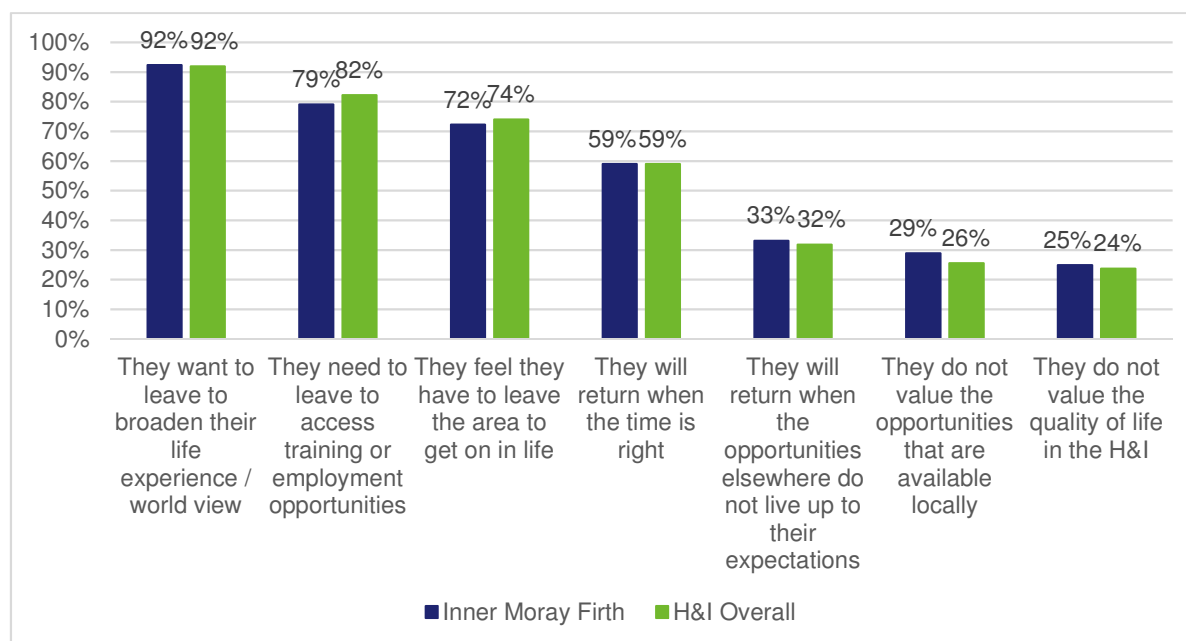
Figure 3.2: Views on those who stay (% who strongly/slightly agree)



Source: *ekosgen survey of young people, 2018 (Overall n=2,527, Inner Moray Firth n=992)*

3.7 Most feel that young people who leave the region do so to broaden their life experience/world view (92%). There is still a feeling that young people must leave to get on in life or to access training or employment opportunities, although fewer in the Inner Moray Firth than regionally agree with the latter (79% versus 82% regionally). Three-fifths (59%) feel that those leaving will return when the time is right. Only a quarter (25%) are of the view that those who leave do not value the quality of life in the region (Figure 3.3).

Figure 3.3: Views on those who leave (% who strongly/slightly agree)



Source: ekosgen survey of young people, 2018 (Overall n=2,523, Inner Moray Firth n=988)

Views of school pupils

3.8 Participating school pupils from the Inner Moray Fifth are most likely to want to continue their education post-school (77%), either at university (62%) or college (15%). Around one in ten (11%) are aiming for employment. Regionally, 74% want to go into FE or HE and 10% to get a job.

3.9 Experiences outwith school and advice from family and friends have the greatest influence on the post-school decisions of young people (for 82% and 75% of those in the Inner Moray Fifth and 85% and 77% regionally). In terms of other factors influencing choices, these school pupils are less likely to cite awareness of the types of jobs available locally (51% compared to 61% regionally), part-time jobs held (35% versus 44%) or their understanding of the types of jobs industries in the region need (31% versus 38%).

3.10 Just over seven in ten (73%) cited the range of subjects available to them at school as good or very good (71% regionally), and 45% feel that this will impact their post-school options (46% overall). Two-fifths (41%) reported difficulty in knowing what to do as a result of limited careers advice.

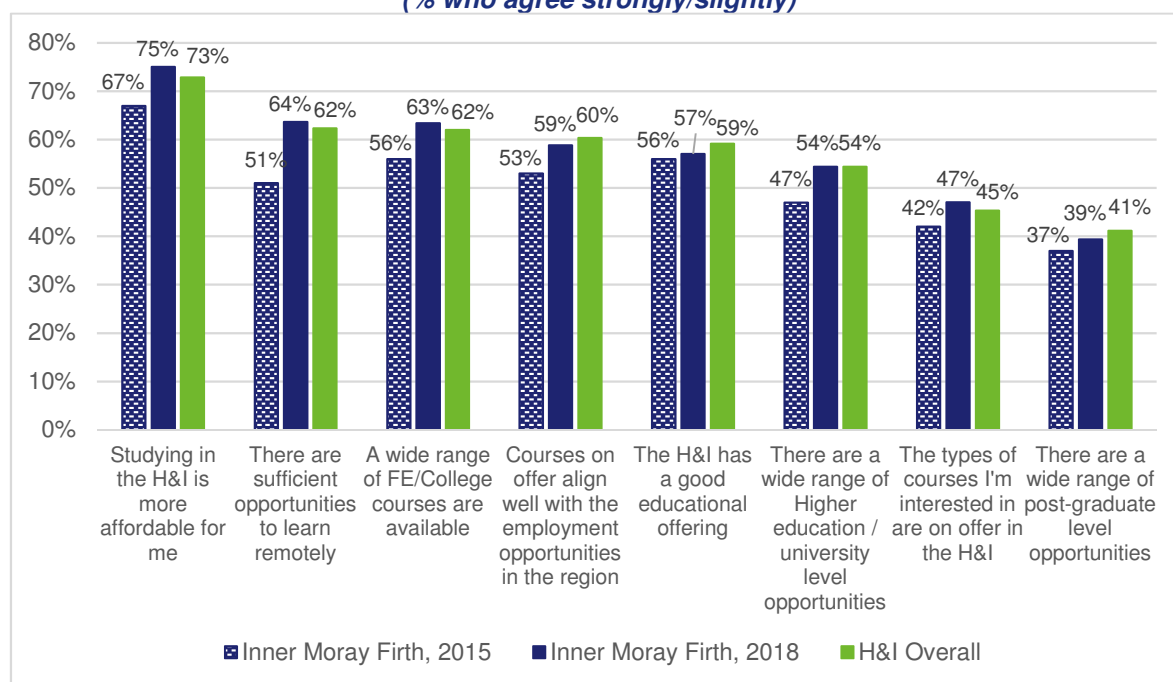
EDUCATION

3.11 As with those across the region overall, young people in the Inner Moray Firth have some strong and favourable views on the educational offering in the Highlands and Islands, with a positive shift since 2015. Attitudes are broadly in line with those expressed at regional level for all factors explored (Figure 3.4).

3.12 Around three in five (57%) agree that the Highlands and Islands has a good educational offering (59% regionally). Just under two-thirds (63%) feel that there is a good range of FE courses and more than half (54%) a good range of HE courses, both up seven percentage points. As in 2015, fewer rate post-graduate level opportunities highly (39% and 37% in 2015).

3.13 There has been marked increases in the proportion of young people in the Inner Moray Fifth who feel that there are sufficient opportunities to learn remotely (up 13 percentage points to 64%) and that studying in the region is affordable for them (up eight percentage points to 75%).

**Figure 3.4: Views on the FE and HE provision in the Highlands and Islands
(% who agree strongly/slightly)**



Source: *ekosgen survey of young people, 2018 (Inner Moray Fifth n=877, H&I Overall n=2,262)*

3.14 As with regionally, availability of chosen course (98%), good academic reputation (94%) and subject specialisation (91%) are the most important factors to young people in the Inner Moray Fifth when choosing where to study. Most feel these factors are available to them in the region, though fewer than regionally agree that institutions in the Highlands and Islands have a good academic reputation (57% versus 63%).

3.15 Young people in the three sub-areas within the Inner Moray Fifth have broadly similar views on the overall educational offering in the region and the range of FE and HE opportunities. Though still positive, those from Easter Ross (60%) and south of Inverness (57%) are less likely than those from Inverness and Nairn (66%) to feel that there are sufficient opportunities to learn remotely. In addition, fewer living south of Inverness perceive studying in the region as affordable for them (63% compared to 75% in Inverness and Nairn and 77% in Easter Ross). They are, however, more likely to feel that the courses they want to study are available to them (52% compared to 48% of in Easter Ross and 46% in Inverness and Nairn).

3.16 Awareness of modern and foundation apprenticeships is slightly lower amongst young people in the Inner Moray Firth (81% and 59%) than across the region overall (84% and 62%). A similar proportion as regionally cited awareness of graduate apprenticeships (63% versus 64%). Most regard these types of apprenticeships as effective routes into employment.

3.17 Over two-fifths (44%) of young people in the Inner Moray Fifth view modern apprenticeships as accessible to them, fewer than the 48% regionally. Reflecting the regional trend, fewer perceive foundation and graduate apprenticeships as accessible (31% and 25% compared with 33% and 25% regionally). Perhaps counter-intuitively, those living in Inverness and Nairn are less likely than those in Easter Ross and south of Inverness to cite foundation, modern or graduate apprenticeships as accessible to them.

EMPLOYMENT

3.18 As with elsewhere in the region, full-time employment is the most common employment goal for young people from the Inner Moray Firth (70% compared to 71% regionally). Around a fifth aspire to self-employment (21% versus 19% overall).

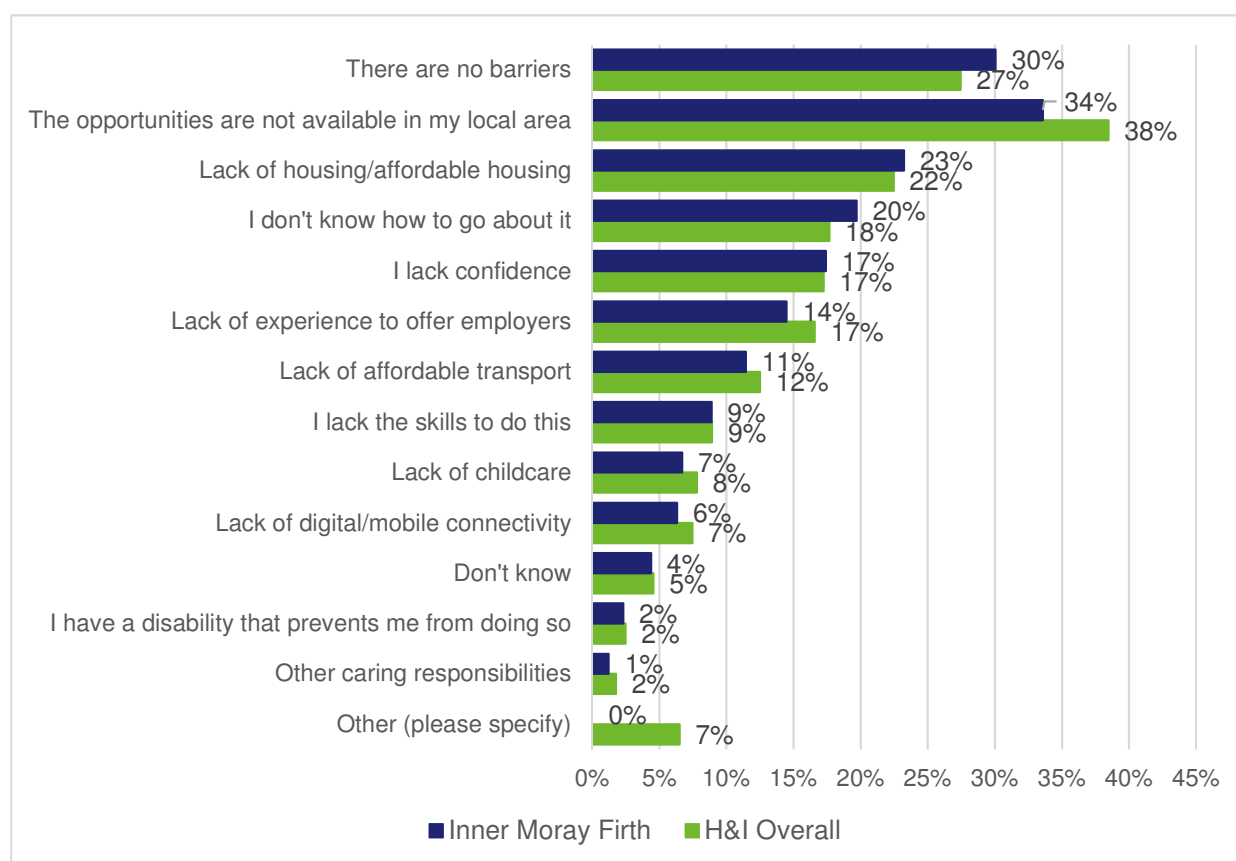
3.19 Although only a fifth aspire to self-employment in the longer-term, more than half (53%) stated some interest in starting up their own business. However, fewer (around two-fifths) feel that they have the ideas (42%), confidence (39%) or knowledge (37%) to do so, and fewer still (18%) access to the necessary finance. Views are broadly in line with those across the region overall, although confidence is slightly higher amongst young people in the Inner Moray Firth (39% compared to 36% regionally).

3.20 Most young people in the Inner Moray Firth (70%) perceive barriers to achieving their employment goals, slightly fewer than the 73% regionally. Lack of local opportunities is less of a barrier to these young people – cited by 34% compared to 38% overall and the lowest of all sub-regions in the Highlands and Islands (Figure 3.5).

3.21 Other barriers identified reflect those reported elsewhere with around a fifth citing lack of housing (23% and 22% regionally), know-how (20% versus 18%) and confidence (both 17%) as challenges.

3.22 Lack of local opportunities as a barrier to achieving employment goals is cited by a higher proportion of young people living south of Inverness (39%) than in Easter Ross (35%) or Inverness and Nairn (32%). Housing is a markedly more significant barrier to those south of Inverness (39%) and is cited by a slightly higher proportion in Inverness and Nairn (23%) than in Easter Ross (19%). Though less of a barrier in the round, lack of affordable transport is more of an issue to those living outside Inverness and Nairn (cited by 16% in Easter Ross and 13% living south of Inverness compared to nine per cent in Inverness and Nairn).

Figure 3.5: Barriers to achieving employment goals (% citing each factor as a barrier)



Source: *ekosgen survey of young people, 2018 (Overall n=2,106, Inner Moray Firth n=822)*

3.23 Almost two-thirds (63%) of young people from the Inner Moray Firth want to work in the Highlands and Islands in the future, up from 45% in 2015 and in line with the regional average (64%). However, these young people are less likely than average to want to work in their local area (33% versus 40%), and more likely to want to work elsewhere in the region (30% compared to 24%).

3.24 In terms of those wanting to work locally in the future, there is little variation across different parts of the Inner Moray Firth (all around a third). This is substantially different from 2015 when those living south of Inverness or in Easter Ross were far less likely to want to work locally. Differences are apparent in terms of proportions wanting to work elsewhere in the region in the future. Young people from south of Inverness (39%) are more likely than those from Easter Ross (32%) and Inverness and Nairn (28%) to want to do so.

3.25 Young people are looking for similar factors in a job as those in other parts of the region. They are most concerned about having a steady job (72% cited this as essential compared to 71% regionally), a good work-life balance (71% versus 70%) and opportunities to progress (64% versus 61%). This was followed by a good salary and an understanding employer (both cited by 59%).

3.26 Most young people in the Inner Moray Firth think that the employment factors they are looking for are available locally (57%) and in the region more widely (59%), reflecting the views of young people across the Highlands and Islands overall (58% and 59% respectively).

3.27 Views do vary within the Inner Moray Firth although all remain positive. Those from south of Inverness are less likely than those in Easter Ross or Inverness and Nairn to think that what they are looking for in a job is available locally – 53% do compared with 57% and 58% respectively. They, along with their peers in Easter Ross, are more likely than those in Inverness and Nairn to see these factors as being available in the wider region (67% and 65% compared with 55%).

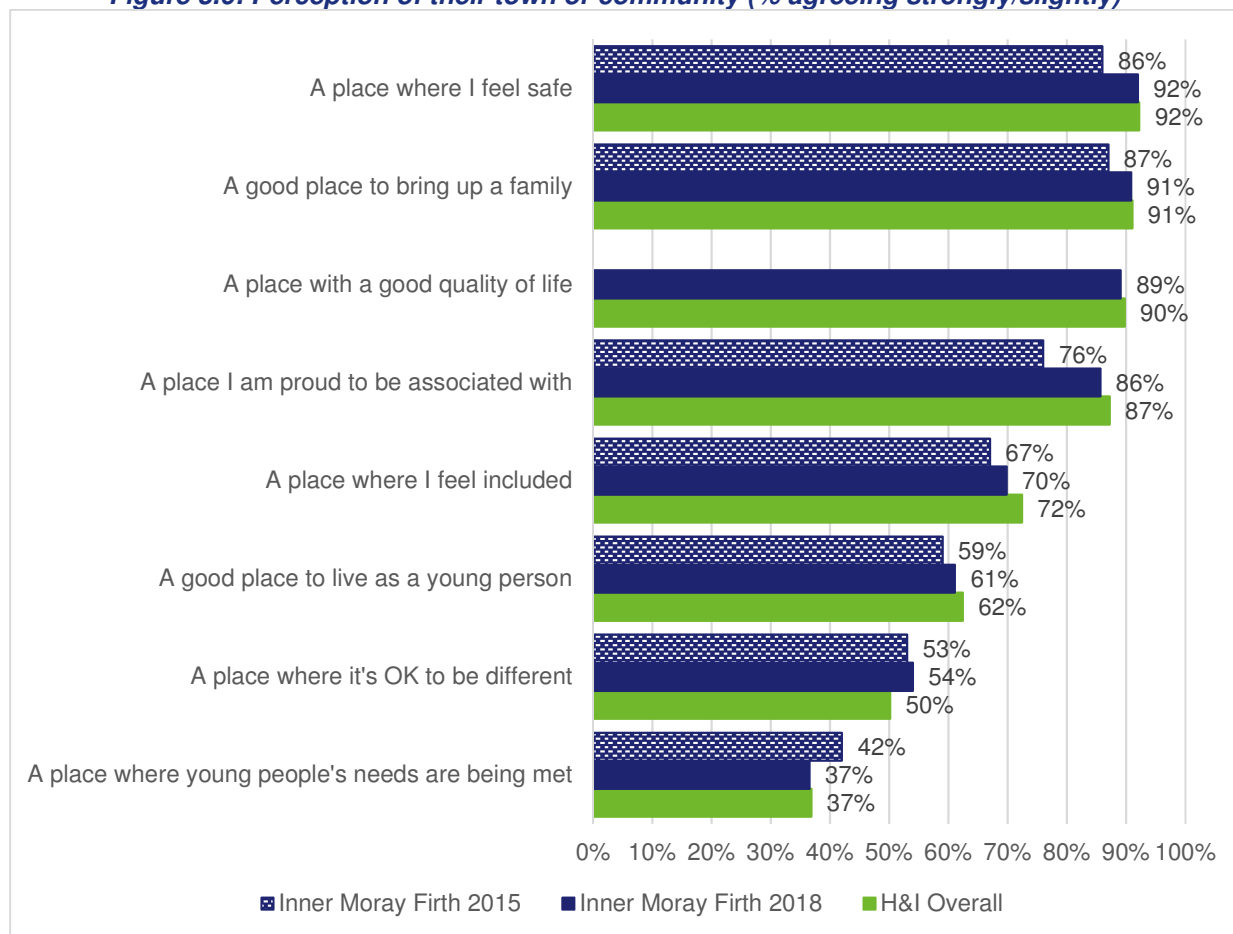
COMMUNITY AND CULTURE

3.28 In line with findings from 2015, young people from the Inner Moray Firth have the lowest rates of community participation of all areas in the Highlands and Islands (54% participate compared to 62% regionally). Levels of participation have also declined since 2015 (from 61% in the Inner Moray Firth and 71% regionally). Participation is lower amongst young people from Inverness and Nairn (51%) and Easter Ross (57%) than amongst those living south of Inverness (69%).

3.29 Young people from the Inner Moray Firth have some strong and positive views on their local towns and communities and these are broadly in line with the perceptions across the region overall (Figure 3.6). Levels of pride are high and have increased markedly since 2015 (from 76% to 86%), with most reporting that they have a good quality of life (89%). More than nine in ten feel their communities are safe (92%) and a good place to bring up a family (91%), with more citing both these factors now than in 2015 (up six and four percentage points respectively).

3.30 While just over three-fifths (61%) agree that their community is a good place to live as a young person, there has been a decline in the proportion of young people who feel that their needs are being met (from 42% in 2015 to 37%). This reflects the regional trend which saw a decline from 41% in 2015 to 37%. A slightly higher proportion than regionally feel that their community is a place where it's OK to be different (54% versus 50%), similar to the proportions citing this in 2015 (53% and 51% overall).

Figure 3.6: Perception of their town or community (% agreeing strongly/slightly)



Source: *ekosgen survey of young people, 2018 (Inner Moray Fifth n=749, H&I Overall n=1,965)*

Note: 'A place with a good quality of life' was not asked in 2015

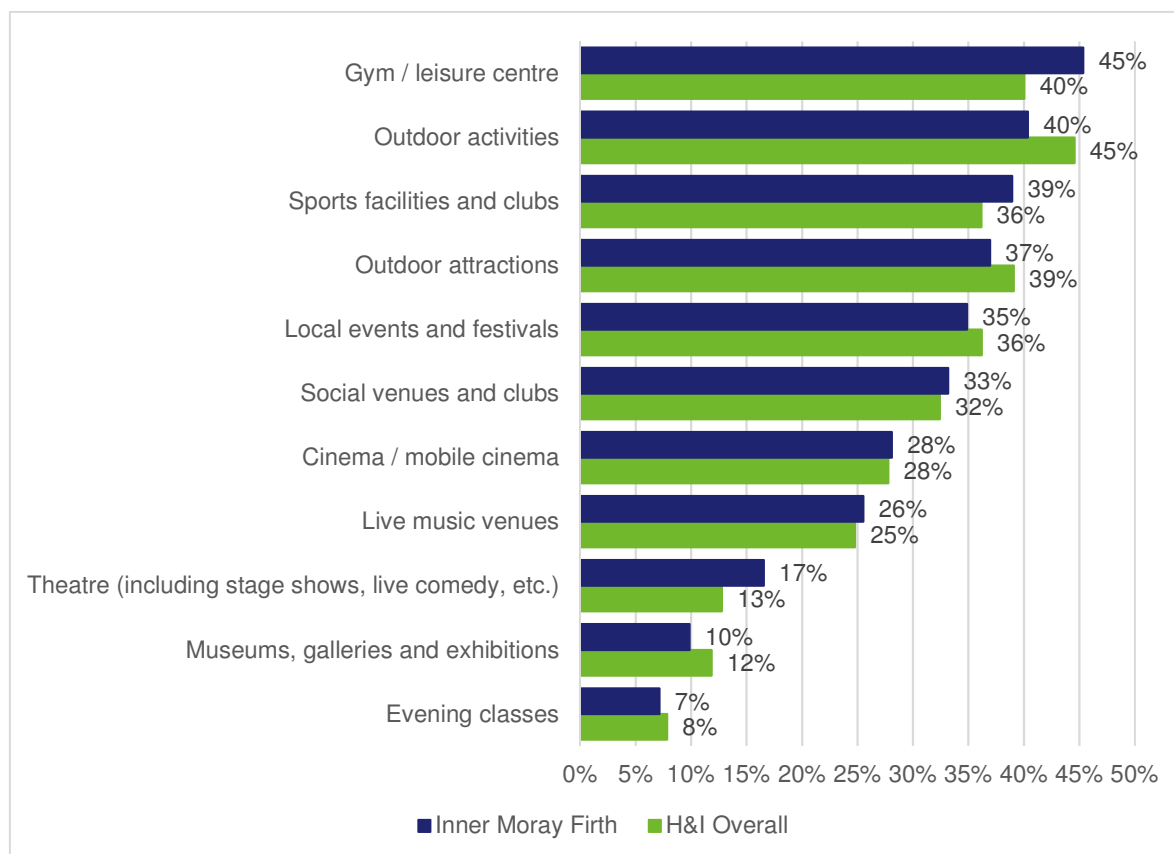
3.31 Views vary across the Inner Moray Fifth area with young people from Easter Ross tending to be less positive than those from Inverness and Nairn and south of Inverness. Though still high, levels of pride are lower among those living in Easter Ross (79% compared to 88% south of Inverness and 89% in Inverness and Nairn). They are less likely to feel that it's OK to be different in their communities (51% versus 55% in Inverness and Nairn and 59% south of Inverness) and that their needs are being met (28% compared to 41% in both Inverness and Nairn and south of Inverness).

3.32 Young people from Inverness and Nairn are most likely to feel that their local town/community is a good place to live as a young person (66% do compared to 55% of those from south of Inverness and 53% of those in Easter Ross). A higher proportion from south of Inverness cite their local town/community as a good place to bring up a family (97% versus 93% of those from Inverness and Nairn and 86% from Easter Ross). However, this group are least likely to feel included in their community: 60% do compared with 68% from Easter Ross and 72% from Inverness and Nairn.

3.33 Levels of engagements with arts, culture and leisure facilities broadly reflected that elsewhere in the region, although frequency of use differs (Figure 3.7). Young people in the Inner Moray Firth are more likely to make frequent/very frequent use of gyms/leisure centres (45% versus 40% regionally) and the theatre (17% versus 13%) and less likely to participate in outdoor activities (40% versus 45%).

3.34 Engagement varied across the Inner Moray Fifth. Those from south of Inverness were more likely than those from Easter Ross and Inverness and Nairn to participate in outdoor activities (55% compared to 40% and 39% respectively) and visit outdoor attractions (45% versus 39% and 35% respectively). They also used evening classes and visited museums, galleries and exhibitions most frequently. Those from Inverness and Nairn made greater use of all other facilities.

Figure 3.7: Use of arts, culture and leisure facilities (% using frequently/very frequently)



Source: *ekosgen survey of young people, 2018* (Inner Moray Fifth n=786, H&I Overall n=2,033)

3.35 Fewer young people in the Inner Moray Fifth than regionally reported barriers to participation in arts, culture and leisure facilities (48% did compared to 52%). The types of barriers faced also differed, with cost generally more likely to be cited as a challenge to each activity and lack of availability perceived as less of an issue.

MAXIMISING OPPORTUNITIES

Compromises

3.36 Young people from the Inner Moray Fifth are the least likely of all areas in the region to say that people must make compromises to live in the Highlands Islands although most still perceive them as necessary (83% compared to 87% regionally). This is lower amongst those from Inverness and Nairn (81%) and Easter Ross (84%), rising to 91% for those living south of Inverness.

3.37 Reflecting the largely urban nature of the area, young people in the Inner Moray Fifth are less likely than across the region overall to identify compromises associated with more difficult and expensive transport (75% compared to 79% regionally), access to events, services and amenities (59% versus 65%), courses on offer at college/university (56% compared to 61%) and digital (31% versus 37% overall) and mobile (38% versus 44%) connectivity.

3.38 However, similar proportions to regionally cited the need to compromise on employment-related factors: fewer job opportunities (75% versus 76% overall), fewer career progression opportunities (60% versus 62% overall), settling for a lower salary (47% compared to 46%) and working below their qualification/skills level (both 40%).

3.39 Sub-area variations are evident in terms of compromises reported. Those from Inverness and Nairn are less likely to report compromises around digital (28%), mobile (34%) and transport (72%)

connectivity (36%, 39% and 86% respectively for those from south of Inverness and 35%, 45% and 80% for those in Easter Ross). Young people from south of Inverness are more likely to perceive accommodation as a challenge (50% do compared to 29% in Inverness and Nairn and 23% in Easter Ross), but are less likely to report compromises on salary (36% versus 46% and 50% respectively) or the range of courses on offer at college/university (50%, 57% and 56%).

3.40 Respondents were asked about the types of compromises they have made or would be prepared to make to live in the Highlands and Islands (Table 3.1). Reflecting findings above, young people from the Inner Moray Firth are less likely than regionally to have already compromised on digital (29% compared to 37% regionally) and mobile (38% versus 45%) connectivity, transport (57% versus 61%) and access to amenities, events, services and leisure facilities (42% compared to 47%). However, higher proportions than regionally would not be prepared to compromise on these factors.

3.41 The proportions that feel they have already compromised on employment-related factors reflect the regional picture. However, more than average would not be prepared to compromise on career progression opportunities (43% versus 39% regionally), salary (40% versus 36%) and working below their qualification/skills level (40% compared to 37%). Along with quality of life (for which 42% would not be prepared to compromise compared with 36% regionally) these are the key 'deal-breakers' for young people in the Inner Moray Firth.

3.42 Young people from south of Inverness are most likely to already have made compromises, particularly in terms of accommodation (36% compared to 20% in Inverness and Nairn and 16% in Easter Ross), but also job opportunities (46% compared to 41% and 35% respectively), underemployment (32% versus 24% and 23%), and the range of course on offer at college or university (36% versus 26% for both Inverness and Nairn and Easter Ross).

Table 3.1: Making Compromises

	I have already made	I would be prepared to make	I would not be prepared to make	I do not think this compromise exists
Accepting that transport and travel is more difficult and expensive	57%	24%	14%	5%
Having limited access to amenities, events, services and leisure facilities	42%	26%	19%	13%
Having fewer job opportunities and choices	39%	19%	35%	7%
Having limited mobile connectivity	38%	21%	22%	20%
Settling for a lower salary	31%	20%	40%	9%
Having fewer opportunities for career progression	30%	18%	43%	9%
Having limited digital connectivity	29%	24%	23%	25%
Having fewer courses on offer at college/university	27%	22%	39%	12%
Working below my qualification and skills level	24%	26%	40%	11%
Living in accommodation that doesn't fully meet my needs	19%	18%	38%	25%
Having a lower quality of life	12%	8%	42%	39%

Source: ekosgen survey of young people, 2018 (Inner Moray Firth n=509)

Enabling opportunities

3.43 Young people from the Inner Moray Firth have similar views to those elsewhere in region on the economic factors required to make the Highlands and Islands an attractive place to live, work and study. Availability of high-quality jobs (70%), affordable and reliable transport (67%), good pay levels (67%)

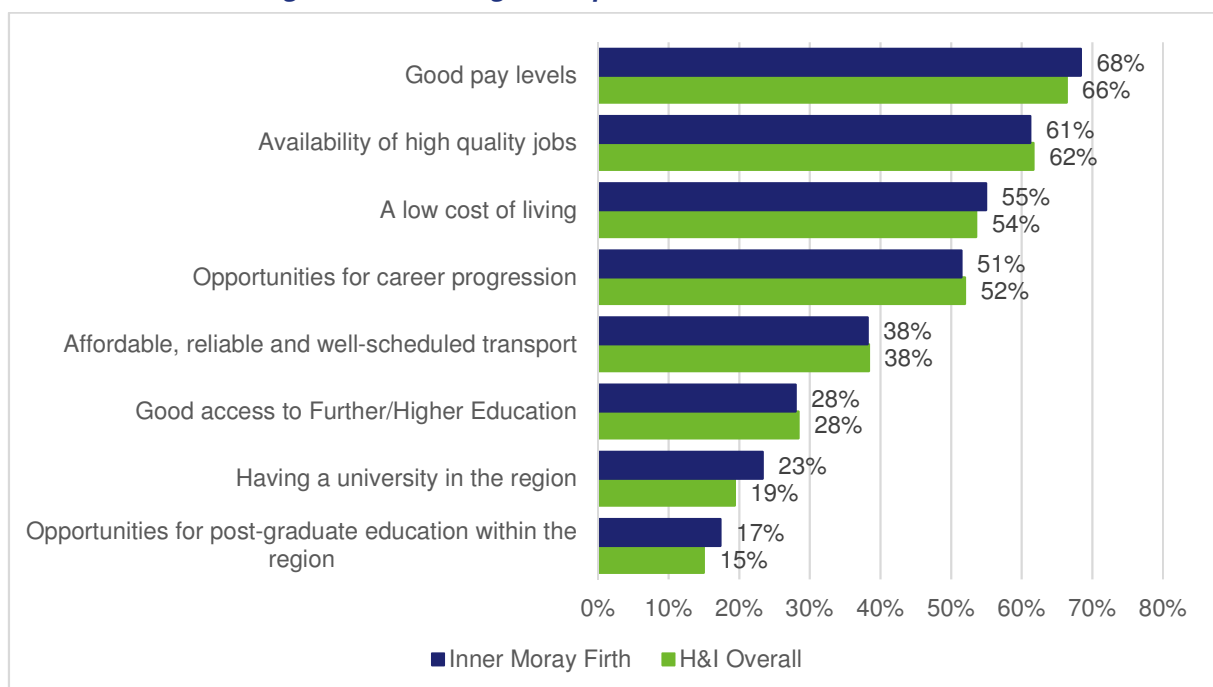
and opportunities for career progression (65%) were seen as the most essential economic factors. Those from the Inner Moray Firth were also the most likely of all areas in the Highlands and Islands to cite having a university in the region as an essential factor (57% versus 46% regionally).

3.44 When the importance of economic factors was ranked, good pay levels (68%), high-quality jobs (61%), a low cost of living (55%) and opportunities for career progression (51%) emerged as the most important economic factors for young people in the Inner Moray Firth (Figure 3.8).

3.45 However, the importance of economic factors varied across the area. Young people in Easter Ross were least likely to prioritise all, bar high-quality jobs (62% compared to 61% in Inverness and Nairn and 56% south of Inverness) and affordable and reliable transport (42%) (with the latter being of greatest importance to those living south of Inverness (47%), and least importance to those in Inverness and Nairn (36%)).

3.46 As well as transport, young people from south of Inverness were also most likely to prioritise a low cost of living (69% do compared to 56% of those in Inverness and Nairn and 50% of those in Easter Ross). Opportunities for career progression and having a university in the region were of greater importance to those in Inverness and Nairn (55% and 27% respectively compared to 50% and 19% for those south of Inverness and 45% and 17% of those in Easter Ross).

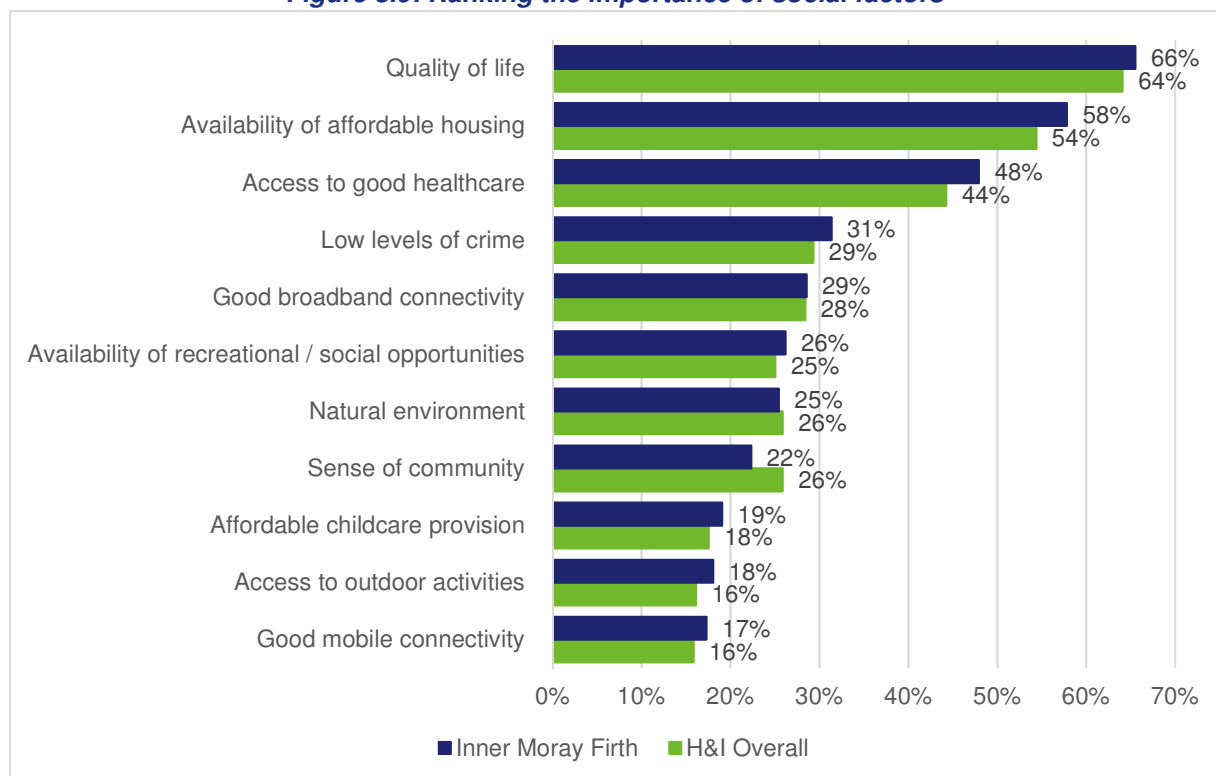
Figure 3.8: Ranking the importance of economic factors



Source: ekosgen survey of young people, 2018 (Inner Moray Firth n=686, H&I Overall n=1,828)

3.47 Young people from the Inner Moray Firth also have similar social priorities to those living elsewhere in the region. Quality of life (73%), access to good healthcare (72%) and availability of affordable housing (70%) were seen as most essential in making the Highlands and Islands attractive to young people. Correspondingly, these were also ranked as the factors of greatest importance (Figure 3.9). Young people in the Inner Moray Firth were the least likely in the region to cite a sense of community as important (22% compared to 26% regionally).

Figure 3.9: Ranking the importance of social factors



Source: *ekosgen survey of young people, 2018 (Inner Moray Fifth n=676, H&I Overall n=1,805)*

3.48 As with economic priorities, there are differences between sub-areas within the Inner Moray Firth. Availability of affordable housing is particularly important for young people from south of Inverness, with 67% of respondents prioritising this compared with 60% from Inverness and Nairn and 53% from Easter Ross. They are also more likely to prioritise the natural environment (36% compared to 24% from Inverness and Nairn and 27% from Easter Ross), a sense of community (31% versus 23% and 20% respectively), access to outdoor activities (28%, 19% and 15%) and good mobile connectivity (22%, 19% and 14%).

3.49 Young people in the Inner Moray Fifth are the most likely in the region to agree that the Highlands and Islands is a better place to live now than it was five years ago (63% agree compared to 54% overall), and this is up from 58% in 2015. In line with regionally, 14% do not feel it is a better place to live now, while a quarter (24%) don't know (32% regionally).

CONCLUDING REMARKS

3.50 The experiences and perceptions of young people from the Inner Moray Firth have improved since 2015. The percentage of young people who identify as committed stayers has increased, although there is still a higher proportion of committed leavers than regionally. They have strong and positive views on their local towns/community and they are more likely than others in the region to feel that they have better local access to cultural, arts and leisure facilities. However, as was the case in 2015, young people in the Inner Moray Firth have lower rates of community participation although this is markedly higher for those living south of Inverness. While more from the Inner Moray Fifth want to live and work in the region than in 2015, they are less likely than elsewhere to see this as being in their local area.

3.51 There are generally positive views on the educational offering in the region, and these have improved since 2015. Whilst those in the Inner Moray Fifth are less likely than those in other parts of the region to perceive barriers to achieving their employment goals, most still do. Lack of local opportunities, housing and transport are more significant barriers to those living south of Inverness or in Easter Ross. Similar to elsewhere in the region, key economic and social priorities for young people in the Inner Moray Firth are focused on employment opportunities, housing and good quality of life.

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