

ENABLING THE NEXT GENERATION

Young People and the Highlands and Islands
Maximising Opportunities:
MORAY



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HEADLINE FINDINGS

Staying and leaving

- Young people in Moray are more likely to want to stay in the Highlands and Islands than they were in 2015 with the proportion of committed stayers up 16 percentage points to 51%.
- Attitudes towards young people who choose to stay in Moray have improved since 2015. Views are generally positive, although slightly less so than across the region overall.

Education

- Young people from Moray are generally more positive about the educational offering in the region than they were in 2015, particularly in relation to the affordability of study, opportunities to learn remotely and the FE/college offering.
- In line with the region overall, post-graduate level opportunities are rated less positively than those for FE and HE. Many young people do not feel that the course they want to study is on offer in the region or that there are institutions that specialise in their chosen subject.
- Awareness of apprenticeships is higher amongst young people in Moray than elsewhere in region, and they are more likely to be viewed as effective routes into employment. However, more needs to be done to improve understanding about availability and to encourage participation, particularly of Foundation and Graduate Apprenticeships.

Employment

- Young people from Moray have similar employment goals as others in the Highlands and Islands, with most aspiring to full-time employment. Fewer saw self-employment as a viable option, although many had an interest in starting their own business. Having the ideas, the confidence and the know-how were barriers to doing so. Access to finance was a significant barrier for those living in Moray, more so than regionally.
- Those in Moray identify many of the same barriers to employment as regionally, most commonly a lack of local opportunities. A lack of affordable housing was cited less frequently than elsewhere. Lack of affordable transport and childcare were particular barriers for those in West Moray. Those in Elgin were generally less likely to cite any barriers.
- Over half of young people from Moray see themselves living in the region in 10 years' time. More still (over three-fifths) aspire to work somewhere in the Highlands and Islands (two in five locally). This is a marked increase from 2015 when less than two in five wanted to work in the region.
- As with elsewhere in the region, young people from Moray see a steady job, a good work-life balance, opportunities to progress, and an understanding employer, as essential qualities in any job. They are more likely than average to think these factors are available locally.

Community and culture

- Young people from Moray have lower rates of community participation than regionally, and lower engagement with arts, leisure and culture. Key barriers are availability and cost.
- Young people in Moray report high levels of pride in their community and express notably more positive views than in 2015, seeing it as a place where they feel safe, have a good quality of life and feel included. However, as across the region overall, more has to be done to ensure the needs of young people are being met.

Maximising opportunities

- Young people from Moray are more likely than those elsewhere in the region to feel that they have compromised on employment-related factors (salary, underemployment and career progression).
- Reflecting the regional trend, employment factors were rated as the most important of the listed economic aspects. Those in Moray placed higher importance on career progression opportunities.
- Quality of life, access to good healthcare and affordable housing were cited as the most important social factors for attracting young people to the region, mirroring the prioritisation seen regionally.

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 Moray 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 Elgin, West Moray and East Moray, highlighting where their views differ from those living elsewhere in Moray.

RESEARCH STUDY APPROACH

1.3 The research consisted of an in-depth survey of young people both living in 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 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 329 young people from Moray participated in the research, more than half of which (176, 53%) were from Elgin, 28% (91) from West Moray, and 19% (62) from East Moray. In terms of age, 23% of the respondents from Moray were 15-18 years old, 38% were 19-24 and 39% were aged 25-30. Most respondents from Moray (70%) were female, whilst 30% were 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 opportunities and points to consider 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 MORAY CONTEXT

INTRODUCTION

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

SOCIO-ECONOMIC PROFILE

Overview of Moray

2.2 Moray covers a large geographic area of approximately 2,238km² and, with a total population of 95,520 (according to 2018 mid-year estimates) has a low population density of approximately 42 inhabitants per km². The largest population centre is Elgin, which is the administrative centre. Other towns include Forres and Buckie.

2.3 Moray has a large manufacturing base and is therefore relatively more exposed to the long-term downward trend of employment in manufacturing. It is also an emerging location for life sciences with a growing digital health cluster, comprising more than 40 organisations including non-government organisations, the health board, education and commercial companies.

2.4 Moray is a hub of military aerospace, home to both RAF Lossiemouth (the service's largest fast jet base) and RAF Kinloss. RAF Kinloss, which was once the main operating base for the Nimrod MRA4 has been replaced by a British Army Base.

2.5 Tourism is a major component of Moray's economy, generating over 10% of the area's total employment and 4% of the total turnover of businesses in the area.²

2.6 In terms of transport, Moray is fairly well served, with direct access to national trunk routes, the UK rail network, and two international airports. The A96 is the main trunk route through Moray, linking it with both Inverness and Aberdeen, and then onwards to other parts of the UK. Rail links to both cities offer regular trains to Glasgow and Edinburgh. Inverness Airport, a 35-minute drive from Elgin, has 138 flights per week including to London airports and a daily connection into the international hub at Amsterdam. Aberdeen Airport, around a 90-minute drive from Elgin, serves 57 international locations.

Population and migration trends³

2.7 In 2018, 18% (16,884) of Moray's total population (95,520) were aged 15-30, higher than the proportion in the Highlands and Islands overall (16%), but below the national average (20%). Between 2011 and 2018, the number of 15-30-year olds in Moray fell by 3.3% while the total population grew increased by 2.2%.

2.8 In 2017-18 Moray had overall net in-migration, however for young people aged 15-19 there was a net out-migration. The population of 15-30-year olds living in Moray is projected to fall by 9% between 2018 and 2041, below the anticipated regional decline of 13%, but above the national projection of a 6% fall. The population in Moray is ageing but not as steeply as across the Highlands and Islands overall.

Education

2.9 School leaver attainment in Moray tends to be below both the national and Highlands and Islands averages. In 2017-18, 57% of school leavers in Moray achieved SCQF Level 6 or above

² Moray's Tourism Strategy - HIE

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).

compared to 62% nationally. In the same year, 94% of school leavers in Moray went on to a positive destination; the lowest rate of all the Highlands and Islands areas, but in line with the national average (also 94%). School leavers from Moray were more likely to go on to university (39% compared to 36% regionally) and further education (29% compared to 21%) than school leavers in the region overall, but less likely to enter employment (23% compared to 34% regionally)⁴.

2.10 Further and Higher Education (FE and HE) provision in Moray is delivered through Moray College UHI which provides a variety of courses across a range of subjects including postgraduate and undergraduate degrees, HNDs, HNC and SVQ courses. Glasgow School of Art also have a campus near Forres, providing studio, workshop and exhibition space as well as areas for research and teaching.

2.11 In 2017-18 there were approximately 3,200 HE and just over 4,000 FE students from Moray studying at universities or colleges in Scotland⁵.

2.12 The majority (79%) of FE students from Moray are studying within the Highlands and Islands, most within their local area (73%) and the remainder elsewhere in the region (6%). Just over a fifth (21%) are studying outside the Highlands and Islands. This is broadly in line with the regional figures – 80% of FE students from the region are studying in the Highlands and Islands, and 20% elsewhere in Scotland. Age-related variations were apparent, however. Around a fifth of FE students from Moray aged 16-19 (21%) and those aged 25+ (21%) were studying outside the region, rising to 30% for 20-24-year olds.

2.13 HE students are more likely than FE students to be studying outwith the region. Just over half (51%) of HE students from Moray were enrolled at institutions outwith the Highlands and Islands, slightly below the average for the region overall (54%). Those aged 20-24 from Moray were most likely to study elsewhere in Scotland (70%), compared to 61% of 16-19-year olds and only 29% of those aged 25+.

2.14 More than a third (36%) of FE students from Moray were studying within the Highlands and Islands, compared to 34% regionally. In line with the average for the Highlands and Islands, 12% were studying through the Open University so likely to be based at their home in Moray.

Employment and economic activity⁶

2.15 Employment and economic activity rates in Moray tend to be below the regional average and closer to national rates. In 2018, the employment rate in Moray was 72.8% (74.1% nationally, and 78.9% for the Highlands and Islands). The economic activity rate was 77.1% (77.4% nationally and 81.3% regionally).

2.16 Relative to other sub-regions of the Highlands and Islands, Moray also had amongst the lowest employment and economic activity rates for 16-24-year olds, although still higher than the national averages. Sixty percent of 16-24-year olds in Moray were employed, compared to 67.1% across the region and 57.2% nationally. This may partly reflect the higher proportions going on to FE and HE post-school. Sixty-seven percent of 16-24-year olds in Moray were economically active, below the regional average (71.6%), but above the national rate (63.3%).

2.17 In 2018, the proportion of economically inactive 16-24-year olds in Moray (33.3%) was higher than the regional rate (28.4%), but below the national rate (36.7%). Moray's total economic inactivity rate (22.9%) was in line with the national rate of 22.6%, but above the regional average of 18.7%.

2.18 At 5.5% the total unemployment rate in Moray was higher than both the national (4.3%) and regional (2.9%) averages. While data on the youth (16-24) unemployment rate in Moray is not available, the rate across the Highlands and Islands overall (6.3%) is lower than the Scottish level (9.6%).

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 MORAY

INTRODUCTION

3.1 This chapter provides the key findings from the survey of young people from Moray. 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 Moray compared to the regional average, or variations between those living in different parts of Moray.

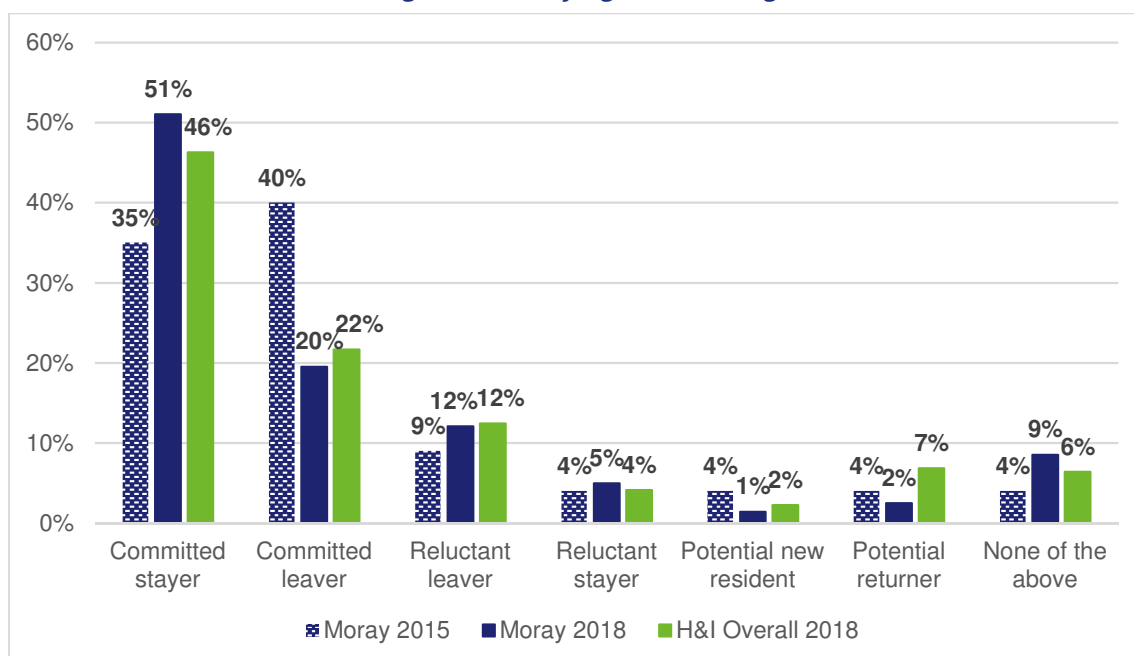
STAYING AND LEAVING

3.2 Around half (51%) of young people from Moray describe themselves as committed stayers, an increase of 16 percentage points since 2015 (35%) (Figure 3.1). This reflects the regional trend of an increase in committed stayers – from 36% in 2015 to 46%. It should be noted, however, that at 77%, the proportion of respondents over the age of 19 – the age band who are generally more likely to be positive about staying – is higher than regionally (71%).

3.3 Around one in five (20%) see themselves as committed leavers, compared to 22% regionally. This represents a positive shift from 2015 when young people from Moray were more likely than young people from other parts of the Highlands and Islands, to want to leave (40% were committed leavers compared to 34% overall).

3.4 The greatest proportion of committed stayers in the Moray area live in East Moray, and the lowest proportion in West Moray. This contrasts greatly with 2015, when young people from East Moray were most likely to be committed leavers and West Moray had the *highest* commitment to staying. Reasons for the shift are unclear, but care should be taken in interpreting the finding, given the low sample sizes for these more granular geographies.

Figure 3.1: Staying and Leaving



Source: *ekosgen survey of young people, 2018* (Moray *n*=282, Highlands and Islands (H&I) overall *n*=2,539)

3.5 More than half (56%) of young people from Moray see themselves living somewhere in the Highlands and Islands in 10 years' time – 40% in their local area and the remainder elsewhere in the region (compared to 32% and 23% regionally).

3.6 There has been a positive shift in attitudes towards those who choose to stay in the region post-school, although they remain slightly less favourable than across the region overall. Two-thirds (66%) think that young people who stay are lucky to be able to do so, below the regional average (69%) but higher than the 63% reported in 2015. Three in five (60%) think those who stay value the good quality of life, up from 51% in 2015, although below the average for the region (65%). Supporting this shift in attitude, only 36% feel those who leave are unlikely to achieve their potential (36% regionally and 31% in 2015) and just over a quarter (26%) that they lack ambition (28% regionally and 31% in 2015).

3.7 While there is still a feeling that those who leave need to do so to access training or employment opportunities (80% agree versus 82% regionally) or to get on in life (both 74%), around three in five young people in Moray feel that those who leave will return when the time is right (58% up from 51% in 2015 and compared to 59% regionally).

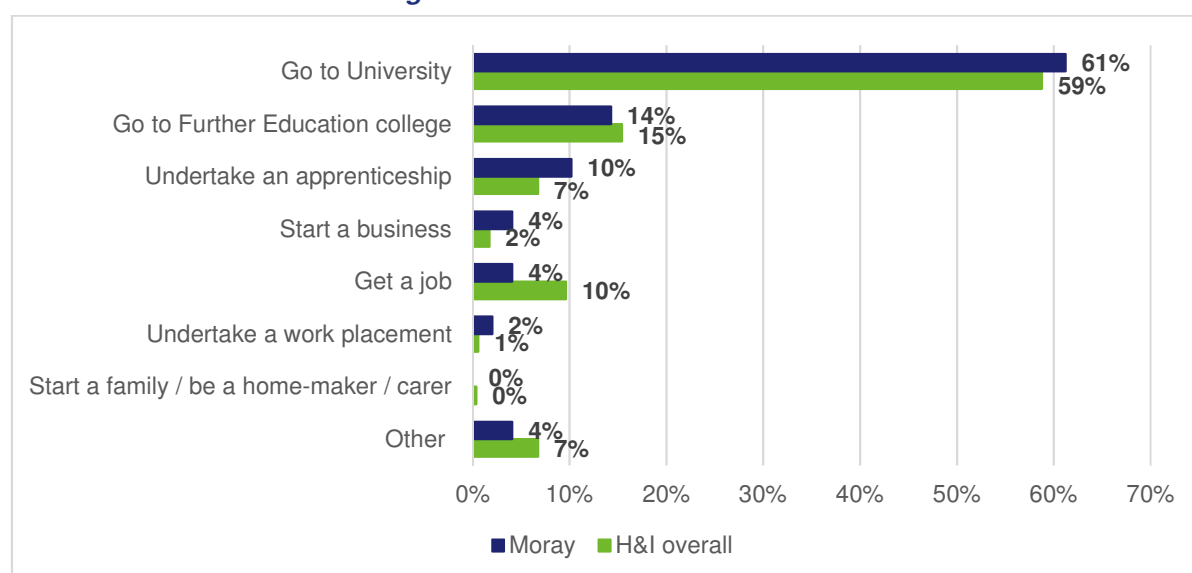
Attitudes and aspirations of school pupils

3.8 Most of the Moray school pupils participating in the survey aspire to continue their education post-school. Three quarters (76%) plan to go to college (14%) or university (61%), broadly in line with proportions for the Highlands and Islands overall (15% and 59% respectively) (Figure 3.2).

3.9 Overall, 14% of school pupils in Moray are interested in either working (4%) or taking up an apprenticeship (10%), below the regional average (17%) and markedly lower than in 2015 (26%). The greatest shift relates to those wanting to secure a job post-school, down from 16% to 4% in 2018. School pupils in Moray are more likely to want to take up an apprenticeship and less likely to want to get a job than their peers across the region.

3.10 School pupils participating in the survey from West Moray were more likely to want to go to university, but less likely to want to go to college than those elsewhere in Moray. Those from Elgin were more likely to aspire to get a job when they left school.

Figure 3.2 Post-school destinations



Source: ekosgen survey of young people, 2018, school pupils (Moray n=49, H&I Overall n=519)

3.11 Almost 70% of school pupils in Moray were happy with their choice of subjects at school (69% compared to 71% overall). Around two-fifths (39%) felt that the range of subjects available would limit their post-school options, lower than the regional average of 46%.

3.12 Experiences outside of school, additional learning done through or outside of school and advice provided by family and friends are the most important factors influencing post-school decisions of young people in Moray, and this reflects the regional findings.

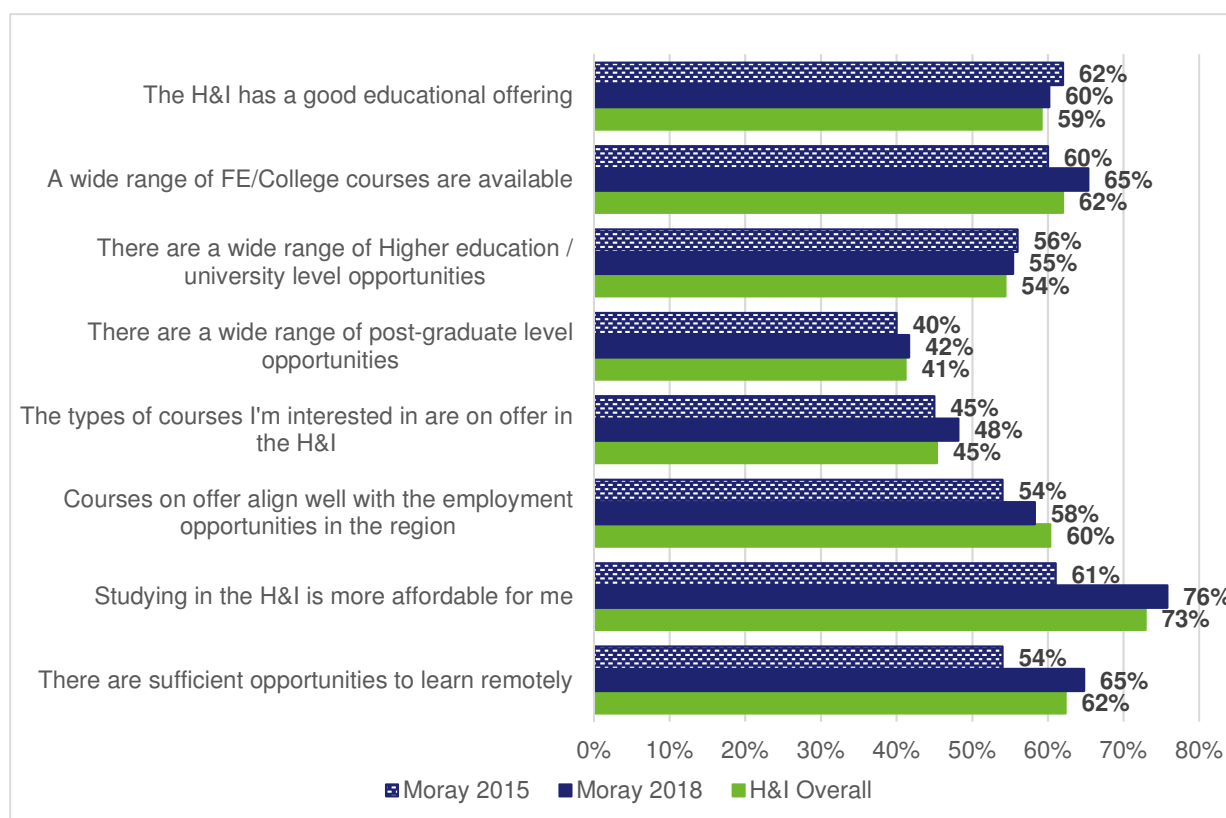
EDUCATION

3.13 As with those across the region overall, young people in Moray have some strong and positive views on the educational opportunities in the Highlands and Islands, and there have been some marked improvements since 2015 (Figure 3.3).

3.14 Around three in five young people in Moray and regionally agree that the Highlands and Islands has a good educational offering, and more than half (55%) that there is a wide range of HE/university opportunities. However, fewer (around two-fifths) feel that there a good range of post-graduate courses available. Young people in Moray are slightly more positive than those regionally about the FE/college offering in the region (65% compared to 62%), up from 60% in 2015.

3.15 Since 2015, there have been increases in the proportion of young people in Moray who feel that studying in the region is affordable for them (from 61% to 76%), that there are sufficient opportunities to learn remotely (from 54% to 65%), and that the type of courses that they are interested in are available (from 45% to 48%). Young people in Moray are more likely to agree with these factors than those elsewhere in the Highlands and Islands. Views on the alignment of courses with employment opportunities in the region have also improved since 2015 (from 54% to 58%).

Figure 3.3: Views on FE and HE in the Highlands and Islands
(% who agree strongly/slightly)



Source: *ekosgen survey of young people, 2018 (Moray n=255, H&I Overall n=2,262)*

3.16 Offering their course of choice, being an institution that specialises in their subject and having a good academic reputation were the main factors affecting young people's choice of college or university. While 65% of young people in Moray agree that colleges and universities in the region have a good academic reputation, less feel that they offer the courses they want to study (58% agree and 42% disagree), and that there are institutions that specialise in their subject (51% agree and 49% disagree). This indicates that more still needs to be done to improve the breadth of the region's education offering.

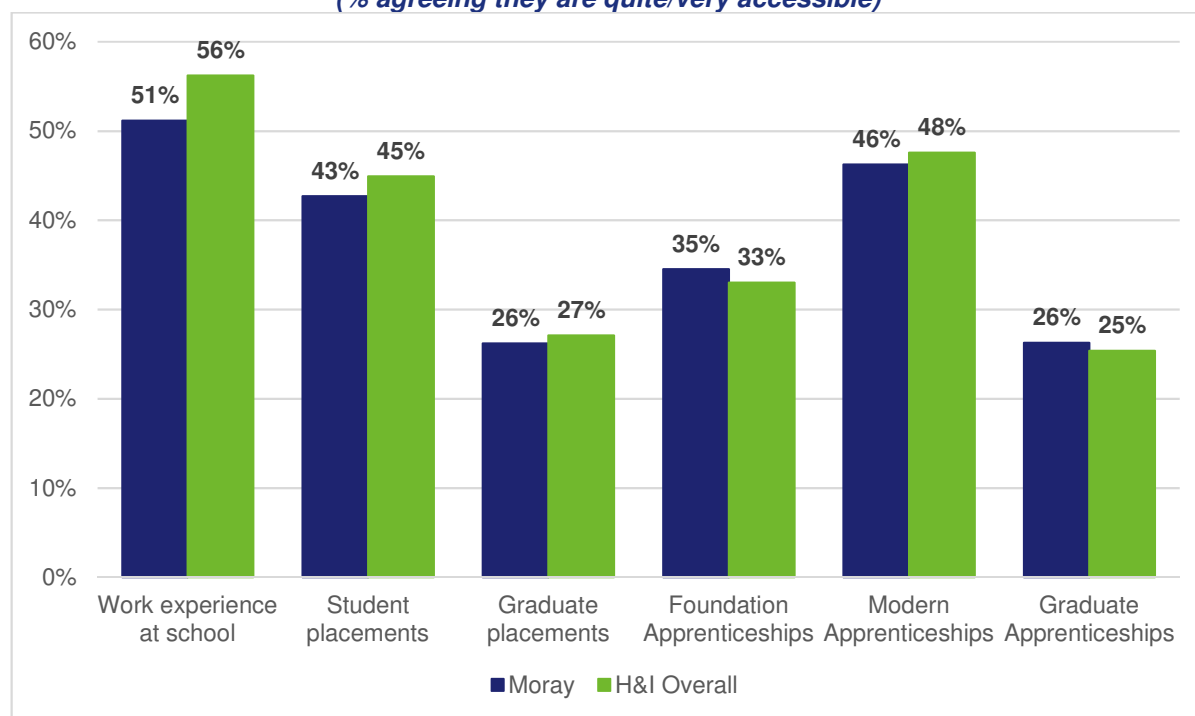
3.17 Young people in Moray were slightly more likely to say that being able to study in their local area influenced their choice of where to study (54% compared to 52% regionally), with those living in East Moray placing more importance on this than those in Elgin or West Moray.

3.18 Awareness of apprenticeships is greater amongst young people in Moray than elsewhere in the region, particularly awareness of Modern Apprenticeships (MA) (88% in Moray compared to 84% regionally), but also Graduate (69% compared to 64% regionally) and Foundation Apprenticeships (65% versus 62%). They are also more likely to view each as an effective route into employment.

3.19 Around a quarter (24%) of young people in Moray were interested in undertaking an MA or had already done so, and this is in line with the regional average (also 24%). More young people in East Moray (30%) than Elgin (20%) were interested in or currently undertaking a MA.

3.20 Young people in Moray tend to rate access to apprenticeships, placements and work experience at a similar level to their peers across the region, although they were less likely to feel they had good access to work experience at school (51% compared to 56% regionally). Reflecting the regional picture, fewer perceived Graduate Apprenticeships, graduate placements and Foundation Apprenticeships was accessible to them. Respondents living in East Moray were more likely to rate opportunities as very or quite accessible compared to those in West Moray and Elgin.

Figure 3.4 Rating of access to apprenticeships, placements and work experience in local area
(% agreeing they are quite/very accessible)



Source: ekosgen survey of young people, 2018 (Moray n=254, H&I Overall n=2,262)

EMPLOYMENT

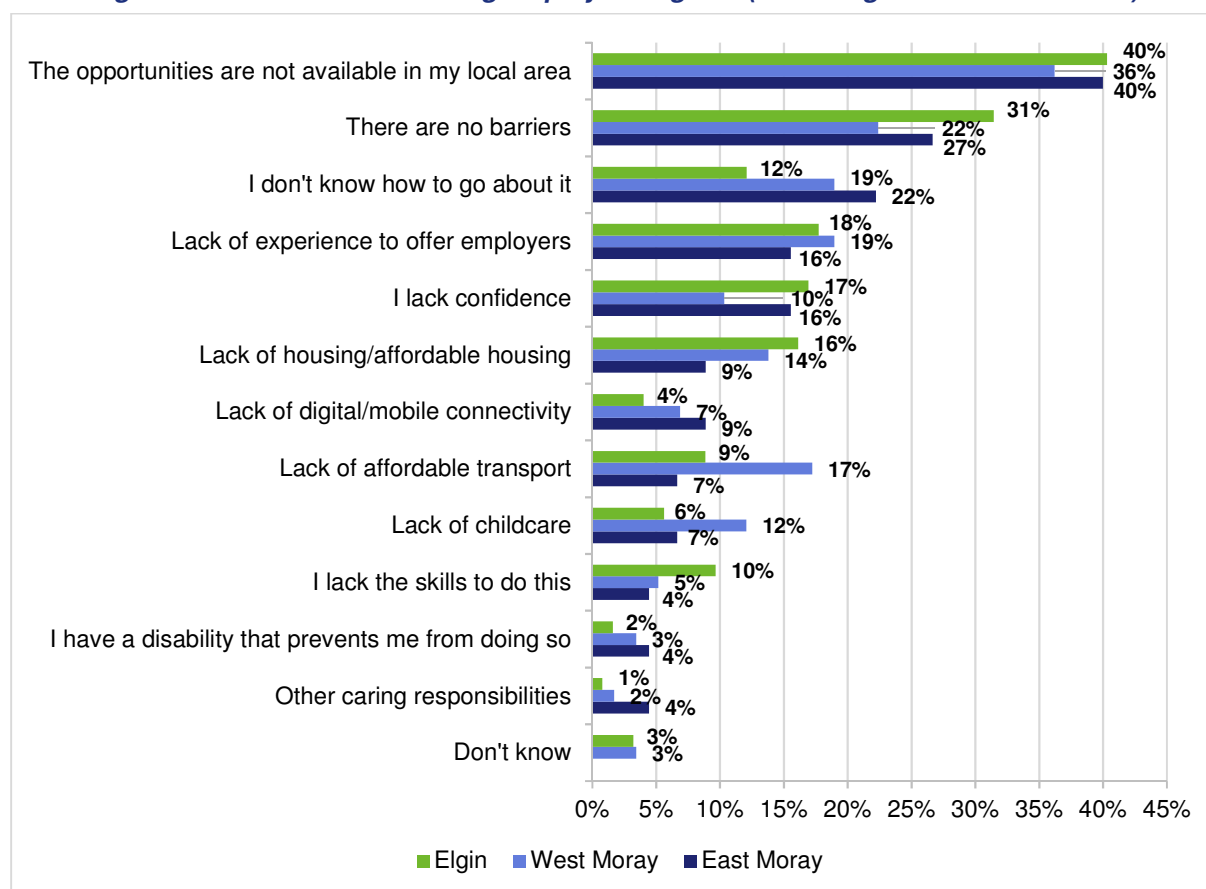
3.21 Young people living in Moray have similar long-term employment aspirations to their peers across the region, with most seeking full-time employment (73% compared to 71% regionally) in the long-term. However, they are less likely to envisage starting a business than those elsewhere in the Highlands and Islands (16% versus 19% regionally).

3.22 Within Moray, young people in Elgin were most likely, and those living in West Moray least likely, to aspire to full-time employment.

3.23 As for the region overall, a lack of local opportunities was perceived as the main barrier to achieving employment goals (39% agreed, 38% regionally). In terms of other factors, young people in Moray were less likely to consider a lack of affordable housing as a barrier to employment at 14% compared to 22% regionally. They were also slightly less likely to regard lack of confidence (15% compared to 17% regionally), know-how (16% versus 18%) or transport (10% versus 12%) as barriers.

3.24 There are some differences in the barriers identified by participants in Moray's sub-areas (Figure 3.5). Those from Elgin were least likely to see barriers to achieving employment goals, but where barriers were cited, they were more likely to relate to lack of housing, confidence and skills. Those in West Moray were particularly likely to see lack of affordable transport and childcare as barriers to realising employment goals.

Figure 3.5: Barriers to achieving employment goals (% who agree each is a barrier)



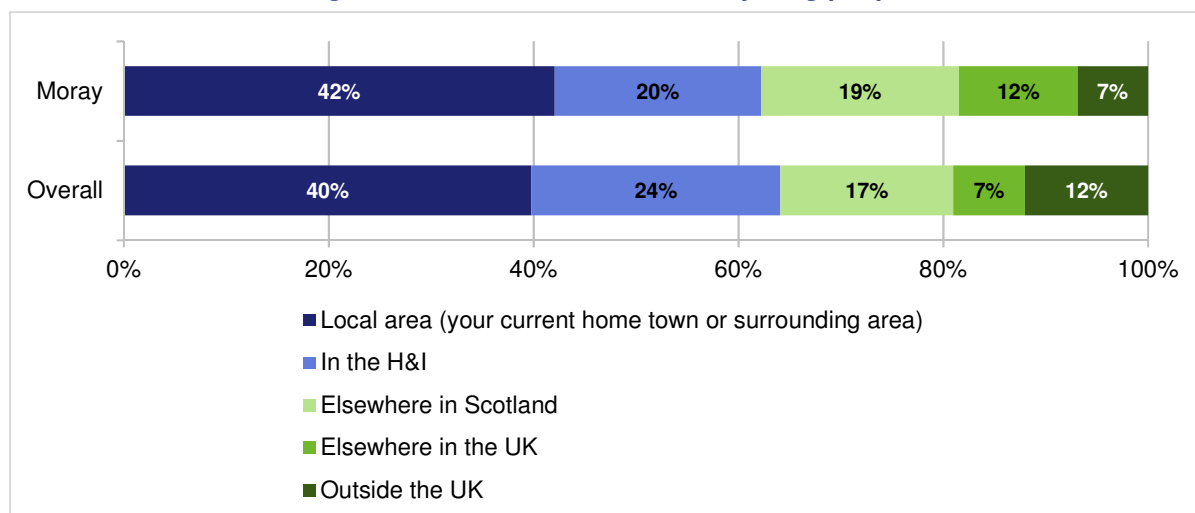
Source: ekosgen survey of young people, 2018 (West Moray n=58, East Moray n=45, Elgin n=124)

3.25 Half of respondents from Moray (50%) stated an interest in starting up a business, slightly below the 53% regionally. However, reflecting the regional perspective, a lower proportion felt they have the ideas (43% and 44% respectively), confidence (34% and 36%) and know-how (34% and 37%) to do so. Access to finance was a significant barrier, particularly for those living in Moray – 10% felt that they could access finance to start their own business, and 84% disagreed, versus 17% and 78% regionally.

3.26 While 56% of young people in Moray see themselves as living in the region in the next 10 years, more still (62%) expressed a desire to work somewhere in the Highlands and Islands in future – 42% in their local area and 20% elsewhere in the region. This broadly reflects the aspirations of their peers regionally (Figure 3.6) and represents a marked increase from 2015 when 38% wanted to work in the region (27% locally and 11% elsewhere).

3.27 Within Moray, almost half of respondents in each of East Moray and Elgin want to work in their local area, as opposed to only a third in West Moray.

Figure 3.6: Ideal work locations of young people



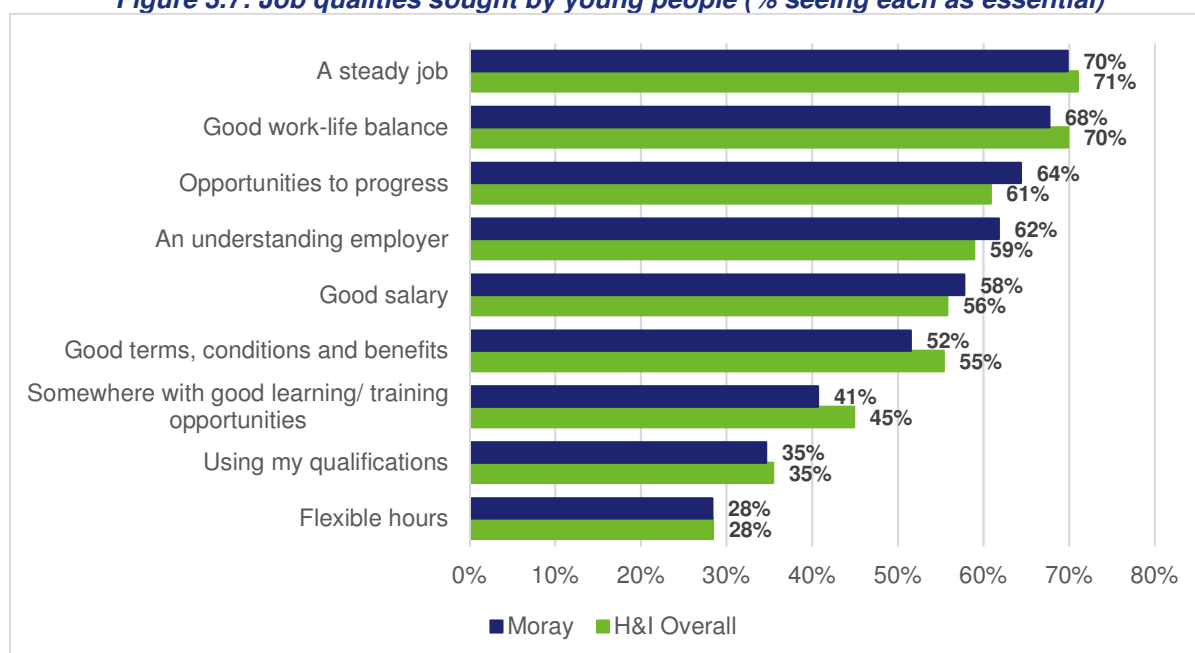
Source: ekosgen survey of young people, 2018 (Moray n=233, H&I Overall n=2,129,)

3.28 In terms of what young people look for in a job, the views of those living in Moray are broadly consistent with those elsewhere in the region (Figure 3.7). They are most concerned about having a steady job (70% cited this as essential compared to 71% regionally) and a good work-life balance (68% versus 70%). This was followed by having opportunities to progress (64%) and an understanding employer (62%), both slightly above the regional figures (61% and 59% respectively). They were slightly less likely than their regional peers to cite good terms, conditions and benefits (52% compared to 55% regionally) and good learning/training opportunities (41% versus 45%) as essential factors.

3.29 Young people in Moray are more likely to say that what they are looking for in a job (at least to some extent) is available locally, at 64% compared with 58% for the Highlands and Islands overall.

3.30 In terms of essential characteristics sought by employers, young people in Moray were more likely than those regionally to cite a good attitude/work ethic (91% vs 85%) and an ability to work flexibly (56% vs 50%). They were less likely than average to see relevant qualifications/skills as an essential criterion (45% compared with 50% for the Highlands and Islands overall).

Figure 3.7: Job qualities sought by young people (% seeing each as essential)



Source: ekosgen survey of young people, 2018 (Moray n=233, H&I Overall n=2,129)

COMMUNITY AND CULTURE

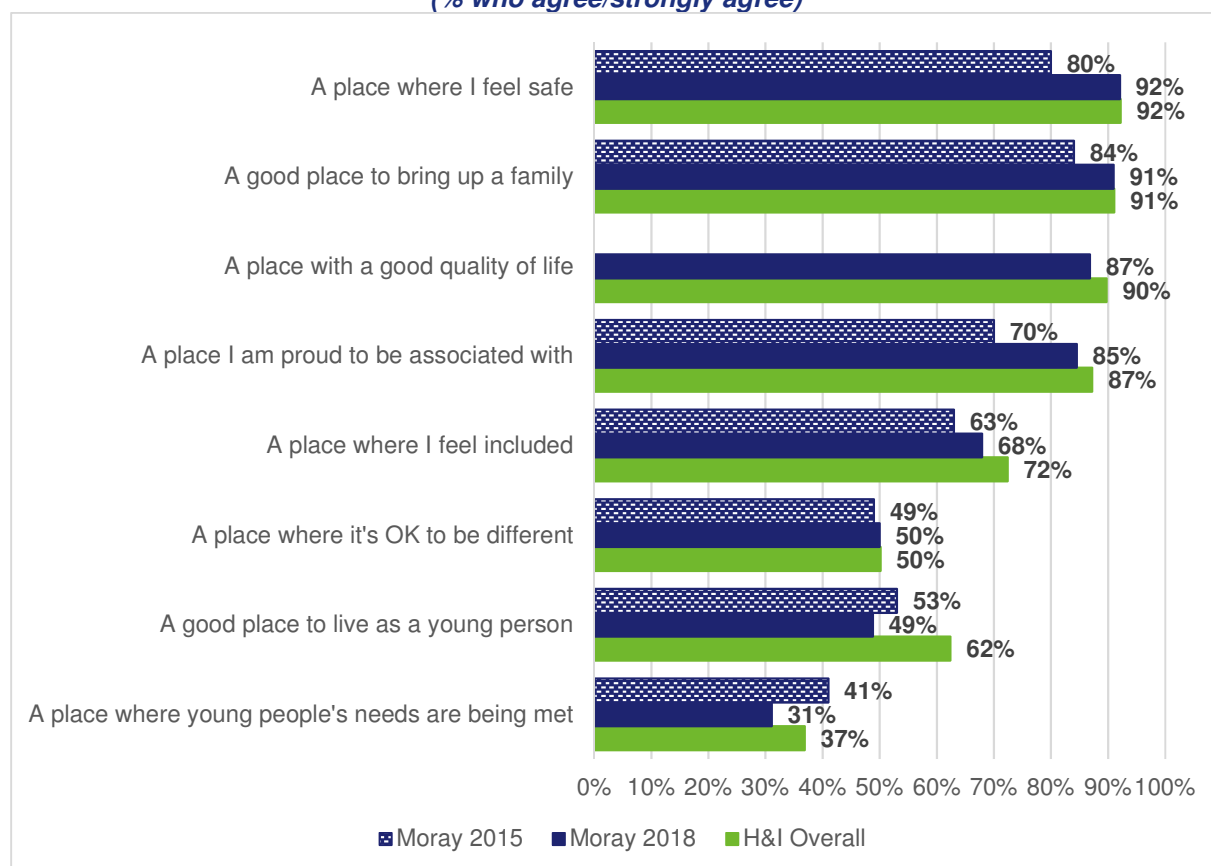
3.31 At 58%, community participation is lower amongst young people in Moray than in the rest of the Highlands and Islands (62%). While levels of participation fell at both regional and sub-regional level between 2015 and 2018, the drop was more pronounced regionally (down 9 percentage points compared to 2 percentage points in Moray).

3.32 Young people in West Moray (65%) are more likely to participate in their community than those from East Moray (59%) and Elgin (54%).

3.33 Despite slightly lower levels of participation, young people in Moray express markedly higher levels of pride and affinity in their community than in 2015, bringing them more into line with regional averages (Figure 3.8). Those stating pride in their community has risen from 70% to 85%. High proportions feel it is a place where they feel safe (92% up from 80%), a good place to bring up a family (91% compared to 84%), and somewhere they feel included (68% up from 63%). Most also value the quality of life in their community (87%).

3.34 Despite this positive shift, more needs to be done to ensure the needs of young people in Moray are being met. As across the region overall, there has been a fall in the proportion of young people agreeing that their local area is a place where their needs are being met (from 41% to 31% in Moray and 41% to 37% regionally). Less than half of respondents from Moray (49%) reported that it is a good place to live as a young person, lower than the 62% regionally and a decrease from 53% in 2015. Only half agree that it is OK to be different in their community, although this remains consistent with 2015 and with regional findings.

Figure 3.8: Perceptions of the town or community
(% who agree/strongly agree)



Source: *ekosgen survey of young people, 2018 (Moray n=215, H&I Overall n=2,262)*

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

3.35 Young people in Moray tend to have a lower level of engagement with arts, leisure and cultural activities than their peers across the region overall. Engagement with live music venues is particularly low (16% use frequently/very frequently compared to 25% regionally), along with sports facilities and clubs (28% versus 36%), and gyms and leisure centres (29% compared to 40%).

3.36 Lack of availability was the most common barrier cited in relation to use of live music venues and local events/festivals, while cost was the main barrier to use of gyms/leisure centres and sports facilities/clubs.

MAXIMISING OPPORTUNITIES

Compromises

3.37 Young people in Moray see compromises as a necessary feature of life in the Highlands and Islands (87% agree, matching the regional average). The key compromises that young people report relate to: more difficult and expensive transport (77% in Moray and 79% in the region overall); limited job opportunities (76% for both); and limited access to events, services, amenities and leisure facilities (72% vs 65% regionally).

3.38 Lower salaries were also identified more frequently as a compromise in Moray than elsewhere (54% compared to 46%). In contrast, accommodation (16% compared to 27% regionally), digital connectivity (28% versus 37%), mobile connectivity (36% versus 44%) and educational opportunities (53% versus 61%) are less likely to be seen as necessary compromises to live in the region.

“[The course choice in the Highlands and Islands is] most definitely becoming [sic] up to speed with bigger areas.” (Young person in Moray)

3.39 Respondents were asked about the types of compromises they have made or would be prepared to make (Table 3.1) to live in Moray. While a lower proportion than regionally cited housing as a general compromise, or one they had already made (13% compared to 19%), this was the issue on which young people in Moray were most unwilling to compromise on (41% vs 34% regionally).

Table 3.1: Making compromises to live in the Highlands and Islands

| | 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 | 53% | 24% | 15% | 8% |
| Having limited access to amenities, events, services and leisure facilities | 48% | 26% | 17% | 10% |
| Having fewer job opportunities and choices | 40% | 15% | 36% | 9% |
| Having fewer opportunities for career progression | 34% | 22% | 33% | 10% |
| Settling for a lower salary | 34% | 21% | 32% | 13% |
| Having limited mobile connectivity | 33% | 28% | 16% | 23% |
| Working below my qualification and skills level | 27% | 23% | 39% | 11% |
| Having limited digital connectivity | 22% | 23% | 26% | 28% |
| Having fewer courses on offer at college/university | 22% | 25% | 35% | 18% |
| Having a lower quality of life | 13% | 8% | 35% | 43% |
| Living in accommodation that doesn't fully meet my needs | 13% | 17% | 41% | 29% |

Source: ekosgen survey of young people, 2018 (Moray n=148)

3.40 In terms of employment related factors, young people in Moray are more likely than average to feel they have already made compromises on: their salary (34% compared to 29% regionally), career progression opportunities (34% versus 31%), and working below their skills/qualifications level (27% versus 24%). Two-fifths reported that they had already compromised on job opportunities/choices (in line with the regional average). These are also factors in which around a third of young people in Moray would not be prepared to compromise on (Table 3.1).

3.41 Young people in Moray are less likely than average to feel they have already compromised on transport (53% compared to 61% regionally), mobile connectivity (33% versus 45%), digital connectivity (22% versus 37%), and courses on offer at college/university (22% compared to 29%). Furthermore, around a quarter of respondents would be prepared to compromise on these factors. However, digital connectivity and educational offering are also factors in which many in Moray would not be prepared to compromise (26% and 35% respectively).

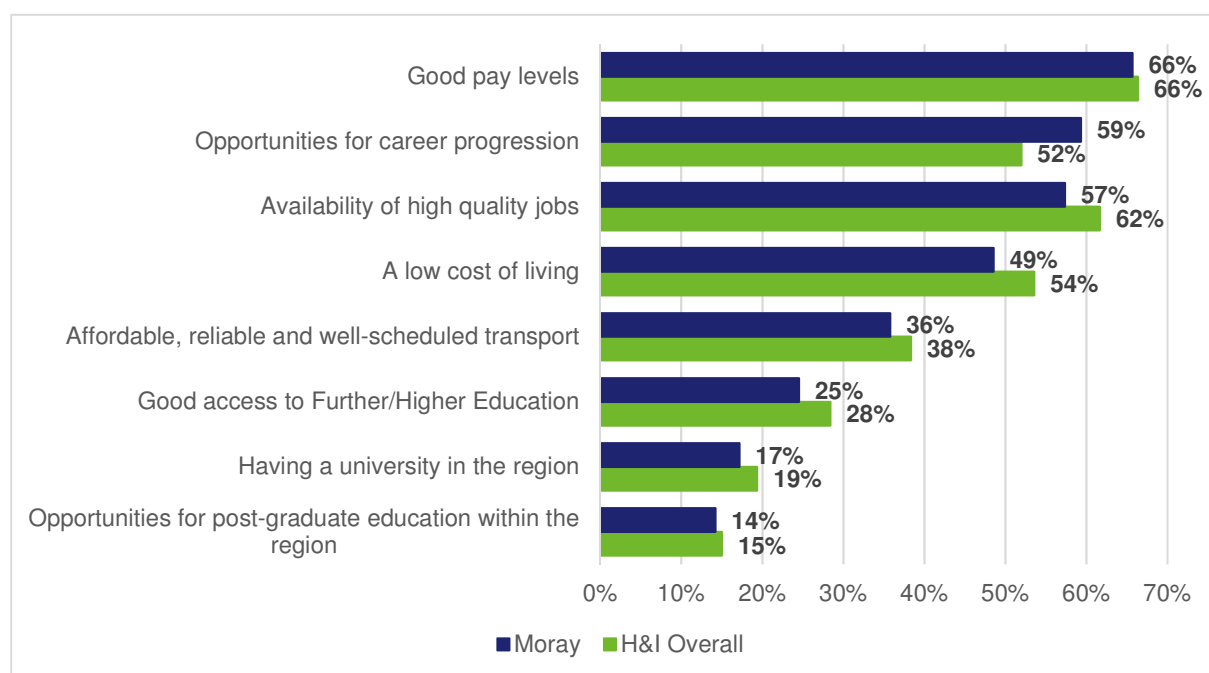
3.42 As for the region overall, quality of life was rated highly amongst young people in Moray. Around two-fifths do not think this compromise exists and only 13% feel they have already compromised on this.

ENABLING OPPORTUNITIES

3.43 Young people in Moray have similar views to those across the region overall on the economic and social factors required to make the Highlands and Islands an attractive place to live, work and study. Good pay levels (69%), high quality jobs (68%), opportunities for career progression (68%) and affordable, reliable, well-scheduled transport (66%) were seen as the most essential economic factors. Good access to FE/HE is also seen as essential by 60% of young people in Moray.

3.44 Reflecting these views, when ranking the importance of economic factors, employment-related factors dominate. Good pay levels (66%), career progression opportunities (59%) and high-quality jobs (57%) were most important to young people in Moray, followed by a low cost of living (49%). While these were also the top four factors cited regionally, career progression opportunities were ranked more highly than high-quality jobs and cost of living by young people in Moray than young people elsewhere in the Highlands and Islands.

Figure 3.9: Ranking the importance of economic factors

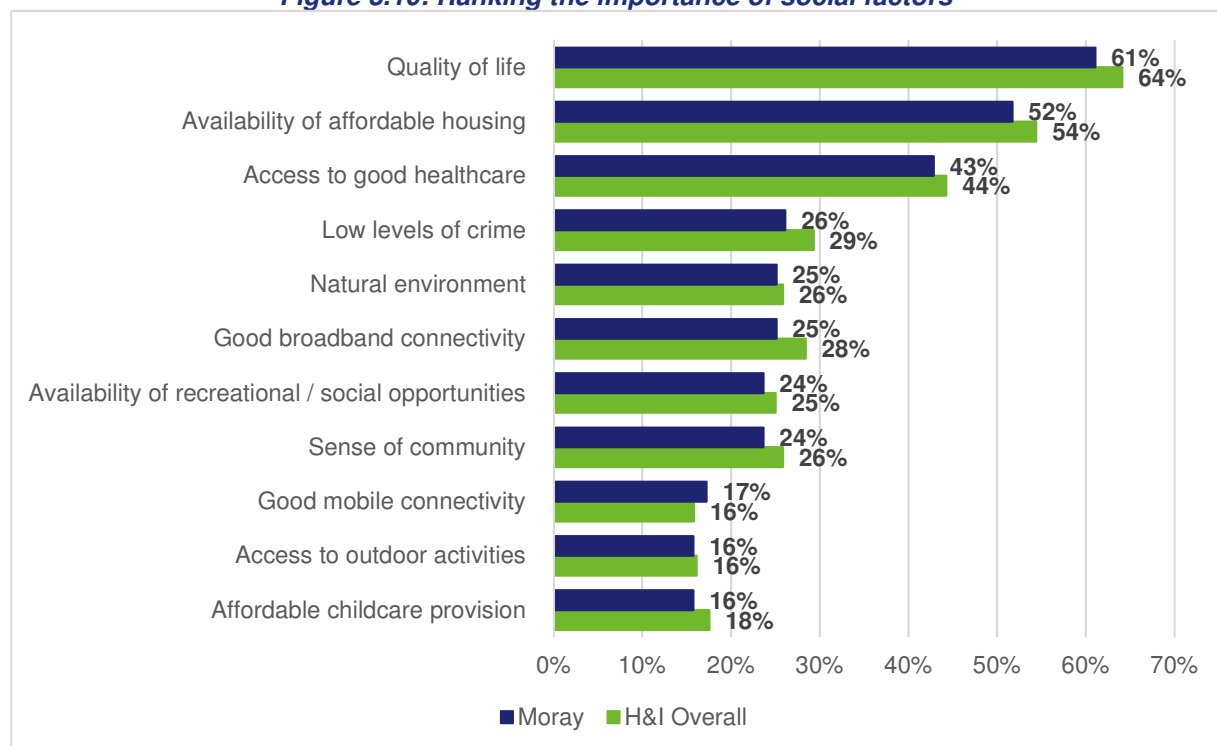


Source: ekosgen survey of young people, 2018 (Moray n=204, H&I Overall n=1,834)

3.45 In terms of social factors, more than half of young people in Moray cited quality of life (74%), access to good healthcare (67%), availability of affordable housing (67%) and good broadband connectivity (54%) as essential to making the region attractive to young people. Correspondingly, quality of life (61%), availability of affordable housing (52%) and access to good healthcare (43%) were cited as the top three most important social factors (Figure 3.10).

3.46 The prioritisation of social factors by those in Moray mirrors the prioritisation regionally, although for most factors (bar access to outdoor activities and mobile connectivity), a slightly lower proportion of young people in Moray cited each as important (from 1 to 3 percentage points lower) (Figure 3.10).

Figure 3.10: Ranking the importance of social factors



Source: ekosgen survey of young people, 2018 (Moray n=203, H&I Overall n=1,805)

3.47 Around half of young people in Moray (47%) think that the region is a better place to live now than it was five years ago, lower than the 54% regionally and a decline from 52% in 2015. Eleven percent did not think the region had improved while 41% were unsure. Young people in Elgin (50%) were more likely to feel that the region had improved than those in West Moray (45%) or East Moray (41%).

CONCLUDING REMARKS

3.48 There have been some positive changes in the attitudes of young people in Moray since 2015. Young people are now more likely to stay in the area, and most see themselves living somewhere in the Highlands and Islands in future, and in their local area specifically. Views on the regional educational offering have improved since 2015, and pride and affinity for local communities has increased markedly. However, community participation is lower than regionally and with a fall in the proportion agreeing that their local area is a place where their needs are being met, more still needs to be done to ensure Moray is an attractive place for young people to live, work and study.

3.49 Whilst young people living in Moray are more likely to aspire to full-time employment than elsewhere in the Highlands and Islands, they are less likely to see self-employment as an option. They are more likely to feel they have compromised on their salary, working below their skills/qualifications levels and career progression opportunities. Reflecting this, employment-related aspects are the most important economic factors to making the region attractive, along with social factors of quality of life, affordable housing and access to good healthcare.

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