

OUR NEXT GENERATION

Young People in Inner Moray Firth:
Attitudes and aspirations.
Research report
August 2015



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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 the Inner Moray Firth. 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 1,430 young people in the Inner Moray Firth who contributed to the research.

1.2 The report presents findings for the Inner Moray Firth as a whole, providing comparisons with the results for the wider H&I. Where possible, analysis is also provided for young people living in the sub-areas of Inverness and Nairn, Easter Ross (north of Kessock Bridge) and south of Inverness, 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. Six high schools in the Inner Moray Firth 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. This has also been the case in the Inner Moray Firth, although to a lesser extent than in other areas across the H&I, particularly in recent years with strong growth in the population before and after Inverness gained City status. 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, locally within Inner Moray Firth, across the H&I region and also nationally. These have a varying level of explicit focus and degree of impact on young people in the region.

The Inner Moray Firth 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 25,968 young people aged 15-29 recorded as living in the Inner Moray Firth, 17% of the total population, (compared to 16% across the H&I and 20% across Scotland)¹ and a third (35%) of all 15-29 year olds living in the H&I. Migration data while not available for the Inner Moray Firth specifically, is available for the wider Highland Local Authority geography which includes the Inner Moray Firth. This shows that, between 2010 and 2012, the Highland Council area had a net out-migration of 194 young people aged 15-29, (with a net out-

¹ Highlands and Islands Enterprise (2014) *Young People in the Highlands and Islands: Socio-economic Profile*. May 2014, p.16

migration of 585 for those aged 17-20)². The Inner Moray Firth experienced a substantial 17% increase in the 15-29 year old population between 2001 and 2011, much higher than the H&I average growth rate of 10%³. Even so, its young population is expected to decrease 13% by 2037.⁴

1.7 The Inner Moray Firth covers a large geographic area of approximately 8,060km² and, with a total population of 154,497 according to 2013 mid-year estimates⁵, has a population density of approximately 19 inhabitants per sq.km.⁶ The largest population centres are Inverness (the administrative centre and the dominant employment centre), Ross-shire and Nairn. Some parts of the Inner Moray Firth are economically and socially more connected to the Central Belt than others, notably parts of Inverness, whereas other parts, such as Badenoch and Strathspey to the south have more in common culturally with other parts of the H&I. This presents a number of infrastructure and connectivity issues that have a bearing on potential growth opportunities, at least to some extent.

Key policies and strategies

1.8 The largest employment sectors in the Inner Moray Firth area are Health and social work and Wholesale and retail, both employing 16% of the workforce. Other prominent employment sectors are Construction, Accommodation and food services, Education and Public administration and defence. HIE's operating plan places a range of sectors at the centre of its long-term strategy. The Inner Moray Firth performs well in the Financial and business services sector, one of HIE's growth areas. The area is also home to a number of the Highlands' visitor attractions and hosts a number of adventure tourism businesses, contributing to the Sustainable tourism sector. It is also important in terms of other priority sectors, including Energy and Life sciences.⁷

1.9 The Highland Economic Development Action Plan, developed by the Highland Economic Forum, outlines key interventions that will be taken to help stimulate the economy. It aims to build on the substantial employment and population growth the Inner Moray Firth has experienced in the last ten years. The main priorities are:

- *“To stimulate and support indigenous business growth (including new business formation, diversification, internationalisation and collaborations);*
- *To help maximise the impacts of the UHI and attract national and international research funding into the area;*
- *To ensure that the workforce, sector by sector, has the skills to enable the region and its businesses to capitalise on opportunities;*

² Please note, data on net out-migration between 2010 and 2012 for Inner Moray Firth is not available due to data limitation issues; data for Highland Council is the best available.

³ Highlands and Islands Enterprise (2014) *Young People in the Highlands and Islands: Socio-economic Profile*. May 2014, p.16

⁴ Highlands and Islands Enterprise (2014) *Young People in the Highlands and Islands: Socio-economic Profile*. May 2014, p.18. Please note these figures are only available at the Highland Council level due to data availability limitations.

⁵ Mid-Year Population Estimates 2013 (NRS), provided by Highlands and Islands Enterprise.

⁶ Highlands and Islands Enterprise (2011) *Area Profile for Inner Moray Firth*. January 2011, p.1

⁷ <http://www.hie.co.uk/regional-information/area-information/inner-moray-firth/key-sectors.html>

- *To address the growing problem, shared with other parts of the UK, of youth unemployment, and to attract back those with family connections with the region to help fill new job opportunities in renewables, tourism, life sciences, IT, etc.*
- *To focus on job creation that will help raise the region's relatively low average earnings in the private sector;*
- *Whilst creating jobs in the short term to compensate for public sector cuts and maintain the region's growth momentum, to take a long term strategic approach to growing the business base and creating career opportunities.*⁸

1.10 This vision fits well with HIE's Operating Plan (2015-2018) priorities; to help support businesses and local enterprises to shape and realise their growth aspirations; strengthen communities and areas at risk of exclusion; help to stimulate development in the key growth sectors; and develop the conditions for a competitive and low carbon economy.⁹

1.11 The Highland Council Community Planning Partnership's Single Outcome Agreement (SOA) is the framework that has been adopted to assess the outcomes of its Economic Development Strategy. Two of the most relevant SOA outcomes to young people are "*to increase number of people in areas of deprivation engaged in activities that strengthen the skills and confidence of those communities to take effective action on community issues*" and "*to improve access to services for hard to reach and disadvantaged communities*".¹⁰ These are significant commitments that will help to negate the perceived geographical disadvantages of not being in a central or urbanised area.

1.12 At a regional level, the Highlands and Islands Regional Skills Investment Plan¹¹ (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 area, including Energy and the Creative Industries.

Key Investments

1.13 HIE, Highland Council and other partners are responding to the opportunities and challenges in the Inner Moray Firth through key investments. In particular, the new University of the Highlands and Islands (UHI) state-of-the-art Inverness campus, the area's principal institute for higher education which opened in May 2015, will be a nationally and internationally significant site for business, research and education.¹² The campus will support local industry with research, innovation, and overall skills development in line with local, regional and national priorities, providing higher education opportunities for students of all ages and attracting additional investment to the area.¹³

⁸ Highland Economic Forum (2012) An Action Plan for Economic Development in Highland. 14 March 2012, p.1

⁹ Highlands and Islands Enterprise (2015) *Operating Plan 2015-2018*, p.4

¹⁰ Highland Community Planning Partnership & Scottish Government (2013) Single Outcome Agreement

¹¹ SDS (2014) Highlands and Islands Skills Investment Plan

1.14 As the key population centre, Inverness also hosts the main airport in the region, acting as a gateway to other parts of the H&I and beyond, and provides many employment opportunities, particularly within the Financial and business and Life sciences sectors. Further, the IronWorks live music venue, which opened in 2010, is a key part of the Creative industries sector, which provides a venue for live music, events and conferences in the centre of Inverness, further facilitating economic growth.¹⁴ The Council is also investing in regenerating Inverness city centre, particularly around Academy Street, through its Townscape Heritage project.¹⁵

1.15 The Energy sector is also a HIE investment priority in Inner Moray Firth, where some £9 million has been approved to the Global Energy Group to help revitalise the Nigg fabrication yard at a cost of over £40 million. Key partners are also working to ensure that growth in the sector and related developments benefit the local workforce. HIE is also investing in tourism, including the £4million loan for the development of accommodation at Cairngorm Mountain, and in the Creative industries, providing support for the international expansion of foundry Black Isle Bronze.¹⁶ Research institutes are also being developed to stimulate growth in the Life sciences sector.

1.16 Additional investments include more wide-scale infrastructure, such as the Next Generation Broadband Access (NGA) roll-out, providing improvements to digital access and communication. In addition to connectivity, the Highland Council has also made housing a priority, in recognition of the fact that *“housing is crucial to the growth of Highland’s economy and the sustainability of its communities.”*¹⁷ Further housing investment is expected for the 2015-2020 period under the Highland Council’s Strategic Housing Investment Plan. As the survey findings demonstrate, the affordability and availability of housing is a key concern for young people.¹⁸

¹⁸<http://www.hie.co.uk/common/handlers/download-document.ashx?id=4bc4a1d2-3377-4bdd-9248-8448bebe0bff>

2 Staying and Leaving

2.1 This section of the report considers whether respondents are likely to stay in or leave the H&I (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 the Inner Moray Firth are less likely to want to leave their local area than is the case across the H&I, and are slightly more likely to be a committed stayer. In all, 46% classify themselves as **committed stayers** in contrast to 43% regionally, while a similar proportion regard themselves as **reluctant stayers** (6% versus 5%). Just over a third (37%) describe themselves as **committed leavers** compared to the regional average of 40%, and a smaller proportion classify themselves as **reluctant leavers** (11% compared to 13%).

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>	Inner Moray Firth (n=1,383)	Highlands & Islands (n=3,607)
	%	%
Committed stayer: <i>I live in the H&I and I plan on living and working here</i>	46	43
Reluctant stayer: <i>I live in the H&I; I would prefer to leave but I don't think I will be able to</i>	6	5
Reluctant leaver: <i>I live in the H&I; I would prefer to stay but I don't think I will be able to live and work here</i>	11	13
Committed leaver: <i>I live in the H&I, but I plan to leave, and live and work elsewhere</i>	37	40

Geographic variations

2.3 Young people from Inverness and Nairn are more likely to see themselves as **committed stayers** (49%) than those in Easter Ross (44%) and those from south of Inverness (35%). Conversely, they are also less likely to describe themselves as **committed leavers** (33%), compared to those from the south of Inverness (39%) and Easter Ross (41%). The proportion of **reluctant leavers** amongst young people south of Inverness (19%) is notably higher than both the Inner Moray Firth (11%) and H&I averages (13%).

Variation by age and status

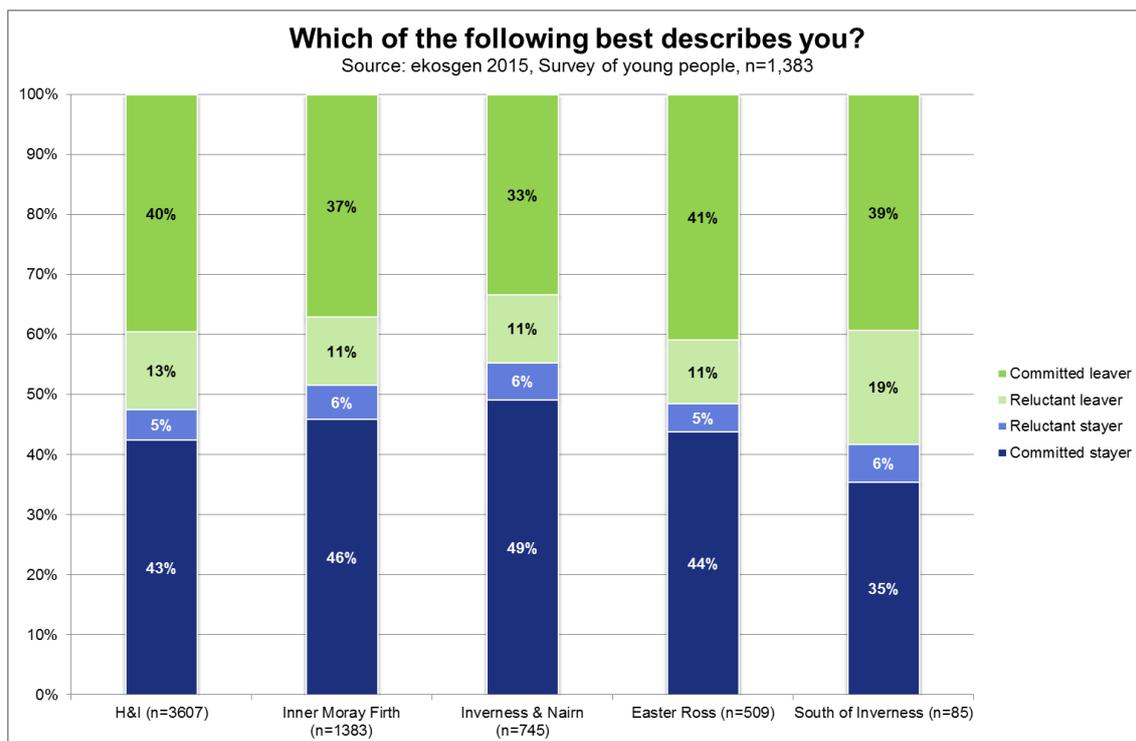
2.4 At 53%, it is those aged 15-18 that are most likely to see themselves as **committed leavers**, in line with the regional average, and tendency for school age people to see their future elsewhere. The proportion is highest amongst young people south of Inverness (59%), falling to 53% in Easter Ross and 51% in Inverness and Nairn. Three quarters of 25-30 year olds describe themselves as **committed stayers**, compared to 54% of 19-24 year olds and 30% of 15-18 year olds.

2.5 Amongst 25-30 year olds, the proportion of **reluctant leavers** is lowest in Easter Ross (8%), compared to 13% south of Inverness and 10% in Inverness and Nairn. Almost one in four

(24%) of 19-24 year olds south of Inverness describe themselves as reluctant leavers, compared to 11% in Easter Ross and 11% in Inverness and Nairn.

2.6 Those in employment/ self-employment are the group most likely to see themselves as **committed stayers** (70% across Inner Moray Firth), while 18% are committed leavers. For university/ college students, over four in 10 (44%) describe themselves as committed stayers, although a considerable proportion see themselves as **committed leavers** (32%).

Figure 2.1



Perceptions of stayers and leavers

Views on those who stay

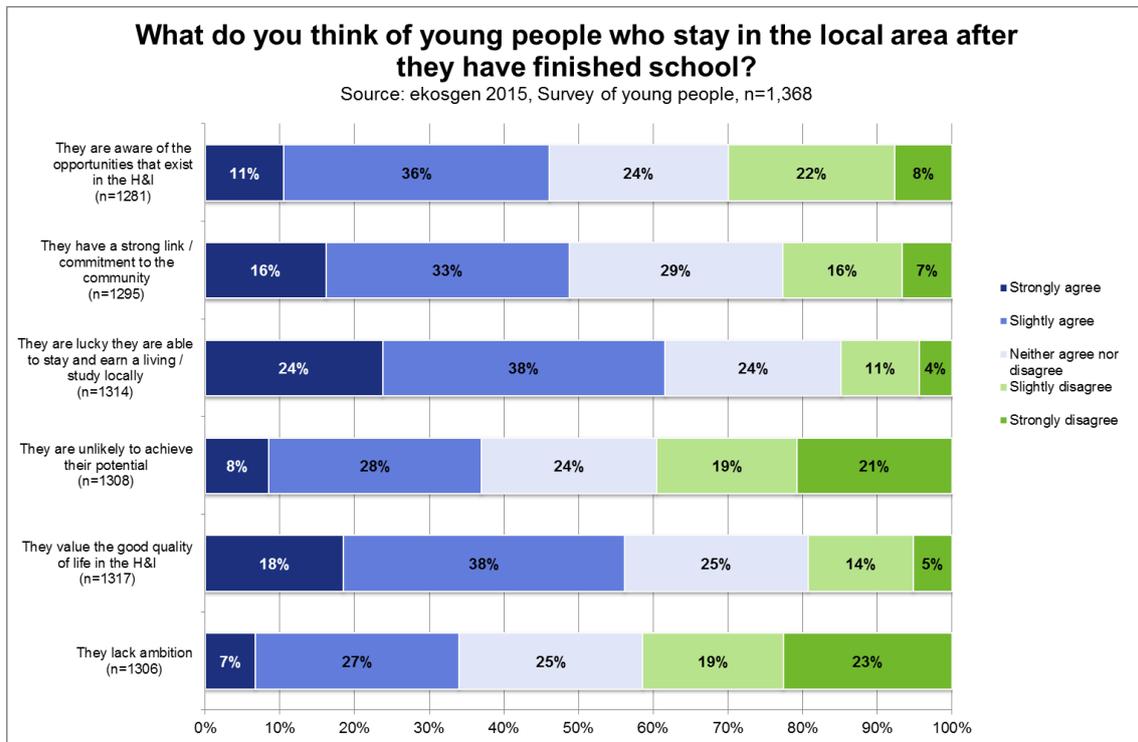
2.7 Perceptions of those who stay in the local area once they have finished school are broadly similar to those across the H&I overall. Just over six in 10 (62%) young people in the Inner Moray Firth consider those that are able to stay and earn a living/ study locally to be lucky (61% regionally), and a further 56% think that they value the good quality of life in the H&I (just below the H&I average of 58%). Around half (49%) consider that those who stay have a strong link/ commitment to the community (five percentage points lower than the 54% in the H&I overall); and 47% consider that they are aware of the opportunities that exist in the H&I (46% regionally).

2.8 More negative perceptions of the decision to stay are either slightly lower in the Inner Moray Firth, or on par with the regional average. Just under four in 10 young people agree that stayers limit their potential (two percentage points lower than the regional average), while 34% agree that they lack ambition, in line with the regional average.

2.9 There are sub-area variations. Those from south of Inverness are less likely to agree that those who stay value the good quality of life (36%) or are aware of the opportunities that

exist in the H&I (39%), while they are more likely to think those who stay lack ambition (40%) or limit their potential (49%).

Figure 2.2

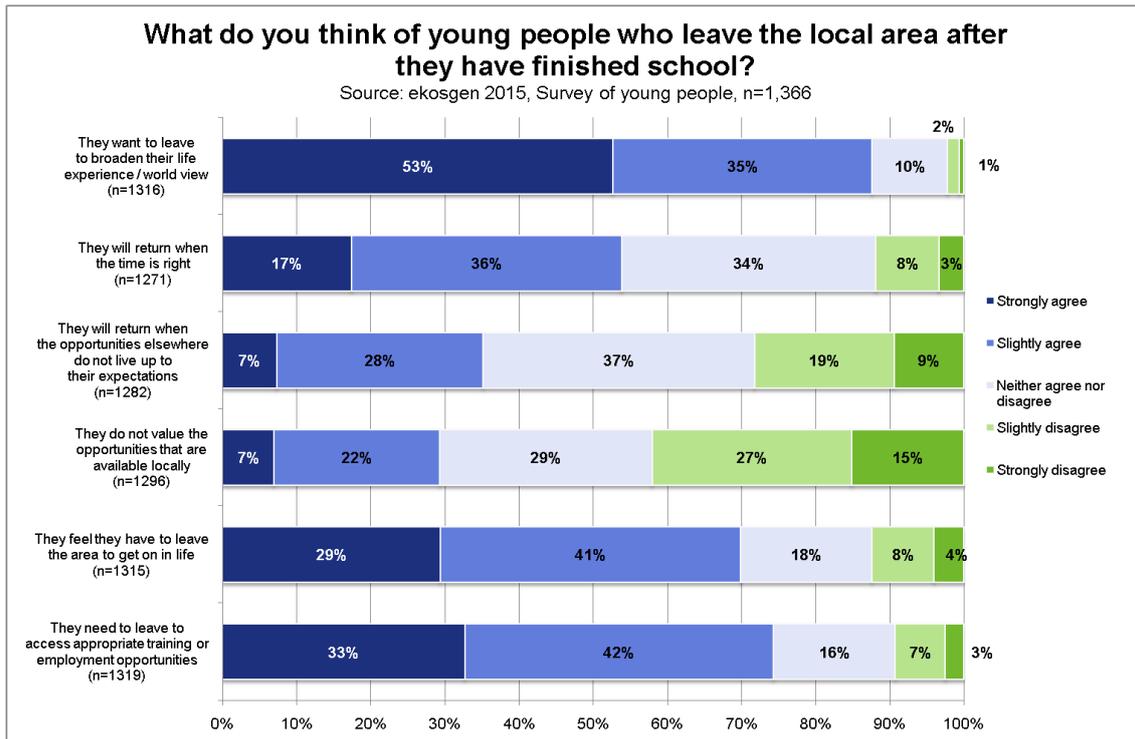


Views on those who leave

2.10 In all, 88% of young people in the Inner Moray Firth agree that leavers wish to do so to broaden their world view, broadly in line with the regional average (87%). Three quarters think that leavers do so to access appropriate training or employment opportunities (75%), which is lower than the H&I average (78%), and 70% think that they have to leave to get on in life (71% regionally). Just over half (53%) consider that leavers will return when the time is right, slightly below the 56% across the H&I.

2.11 Young people south of Inverness are more likely to think that young people have to leave to access appropriate training or employment opportunities (80%), than those in Inverness and Nairn (75%) and Easter Ross (73%); and that they have to leave to get on in life (76%, compared to 71% and 67%). Further, they are less likely to agree that they will return when the opportunities elsewhere do not live up to their expectations (28% compared to 35% in Inverness and Nairn and 37% in Easter Ross), or that they will return when the time is right (34%, compared to 54% and 56%).

Figure 2.3

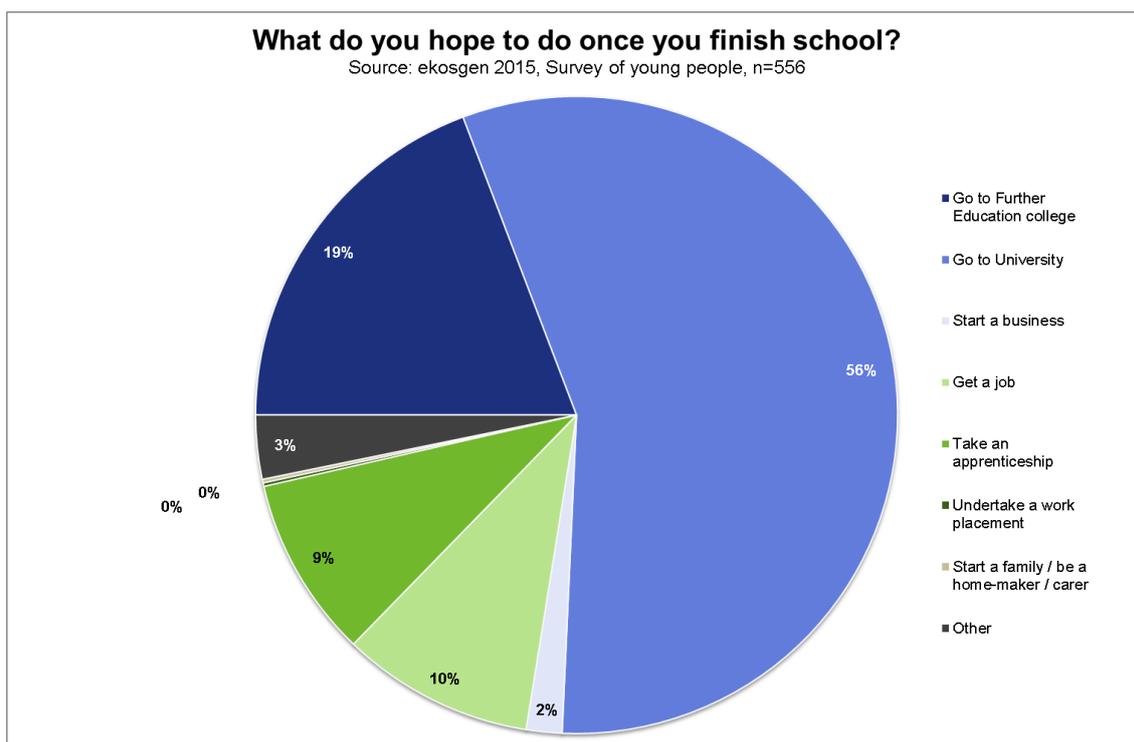


Aspirations of school leavers

2.12 The majority of school pupils in the Inner Moray Firth wish to go to university (56%) or undertake further education (19%) after leaving school, which at 75% combined is slightly higher than for the H&I overall (72%). Around a fifth would either like to get a job or start an apprenticeship (similar to the regional average).

2.13 In Inverness and Nairn, eight in 10 either wish to go to university (64%) or undertake further education (16%). This falls to around three quarters in Easter Ross (54% and 21% respectively) and south of Inverness, where a lower proportion wish to go to university (43%) and more aspire to further education (31%).

Figure 2.4



2.14 Across the Inner Moray Firth as a whole, over one quarter of school pupils wish to either stay in their local area (14%) or move elsewhere in the H&I (13%) after school. The most popular destinations for post-school activity are the Central Belt (23%, compared to 19% in the H&I), elsewhere in Scotland (18%, 22% in the H&I) and elsewhere in the world (18%, in line with the H&I average). Only 4% of school pupils from the Inner Moray Firth want to move to Aberdeen post-school, lower than the 6% across the region.

2.15 The percentage wishing to stay locally is higher in Inverness and Nairn and south of Inverness (both 17%) than it is in Easter Ross (10%), while those wanting to stay somewhere in the H&I is highest south of Inverness (19%), falling to 16% in Easter Ross and 9% in Inverness and Nairn. Young people south of Inverness are particularly keen to live elsewhere in Scotland (31%, falling to 19% in Inverness and Nairn and 13% in Easter Ross). For those wishing to be in the Central Belt, the proportion is highest in Inverness and Nairn (25%), falling to 22% in Easter Ross and 17% south of Inverness.

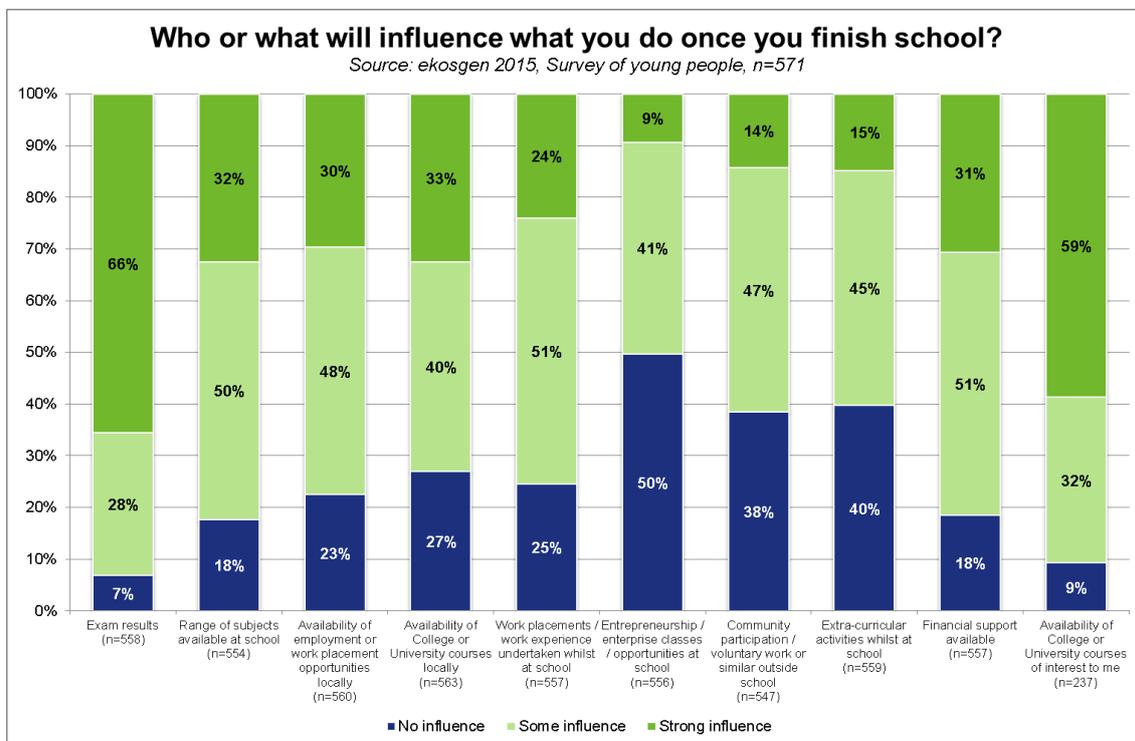
Factors influencing decisions after leaving school

2.16 Factors that may influence post-school decisions generally have a slightly stronger influence for young people in the Inner Moray Firth than for the H&I as a whole. Over nine in 10 consider that exam results would have at least some influence (94%, compared to 91% for H&I as a whole), with 66% stating that this would be strongly influential (versus 62% for H&I). Further, 91% state that interesting college or university courses are influential (compared to 89% regionally).

2.17 Other important factors are the financial support available (of some influence to 82%), the range of subjects available at school (82%) (both in line with the regional average), and the availability of employment or work placement opportunities locally (of some influence for 78% compared to 75% across H&I).

2.18 The availability of college or university courses *locally* is of greater influence in the Inner Moray Firth than across the H&I - 73% stating some influence (33% strongly so) compared to 69% and 27% respectively regionally. Entrepreneurship/ enterprise classes/ opportunities at school were of slightly less influence in the Inner Moray Firth, (50% compared to 52% in the H&I).

Figure 2.5



2.19 Young people living south of Inverness are more likely to be *strongly influenced* by the range of subjects available at school (40%, falling to 34% in Inverness and Nairn and 30% in Easter Ross), the availability of employment or work placement opportunities locally (37%, compared to 28% and 30% respectively) and the financial support available (37%, compared to 21% in both Inverness and Nairn and Easter Ross).

2.20 In contrast, in Inverness and Nairn, it is the availability of college or university courses of *interest* that are more valued, rated strongly influential by 71%, compared to 57% south of Inverness and 53% in Easter Ross; exam results (74%, compared to 60% and 57% respectively) and community participation and/ or voluntary work (16%, versus 9% and 12%).

2.21 In Easter Ross, it is extra-curricular activities whilst at school that are more significant when compared to the other sub-areas, with 18% rating these as strongly influential, compared to 12% in Inverness and Nairn and 11% south of Inverness.

3 Learning in the Inner Moray Firth

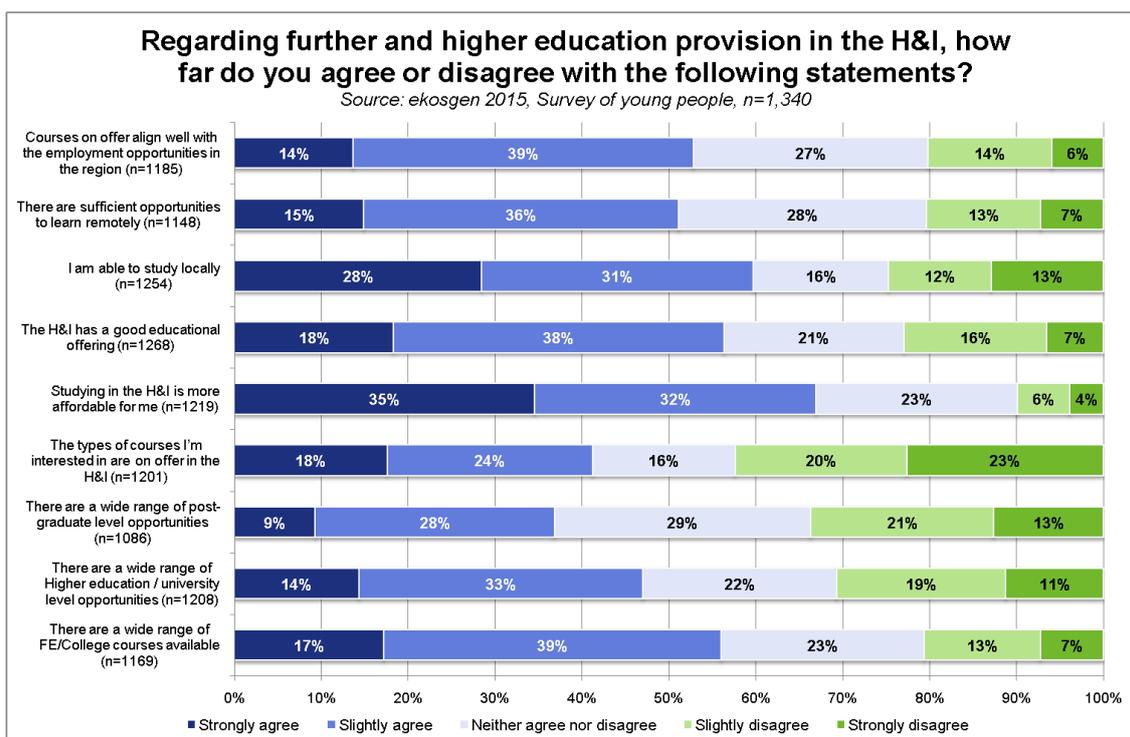
3.1 This chapter explores attitudes and aspirations evident in the Inner Moray Firth in relation to learning; covering Further Education (FE) and Higher Education (HE), and related matters such as graduate placements and the opportunities presented in terms of routes into employment from FE and HE.

Further and higher education provision

3.2 Young people in the Inner Moray Firth consider there to be a good educational offering in the H&I (56%), in line with responses for the H&I overall. Almost six in 10 (59%) agree they are able to study locally, two percentage points above the regional average. More than half (56%) think there is a wide range of FE courses (54% regionally) and 47% think there is good HE provision (45% across the H&I). The *affordability* of studying in the H&I is viewed particularly positively 67% compared to 61% regionally.

3.3 Young people south of Inverness are more likely to agree that there is a wide range of FE/ college courses available (60%, compared to 56% in Easter Ross and 55% in Inverness and Nairn). The proportion agreeing that there are a wide range of higher education/ university level opportunities is greatest in Easter Ross (50%) and south of Inverness (49%), and lowest amongst those from Inverness and Nairn (44%). Overall, postgraduate opportunities are rated more favourably by young people in the Inner Moray Firth (37%) than across the H&I (35%), particularly by those in Easter Ross (40%).

Figure 3.1



3.4 Young people aged 15-18 are generally more likely to think favourably of the educational offering; this is particularly the case for the range of post-graduate opportunities available (45%, which falls to 31% of 19-24 and 28% of 25-30 year olds); the range of higher education/ university level opportunities available (51%, compared to 44% and 43%); and the quality of the educational offering overall (61%, versus 51% and 52%). In contrast, 19-24 year

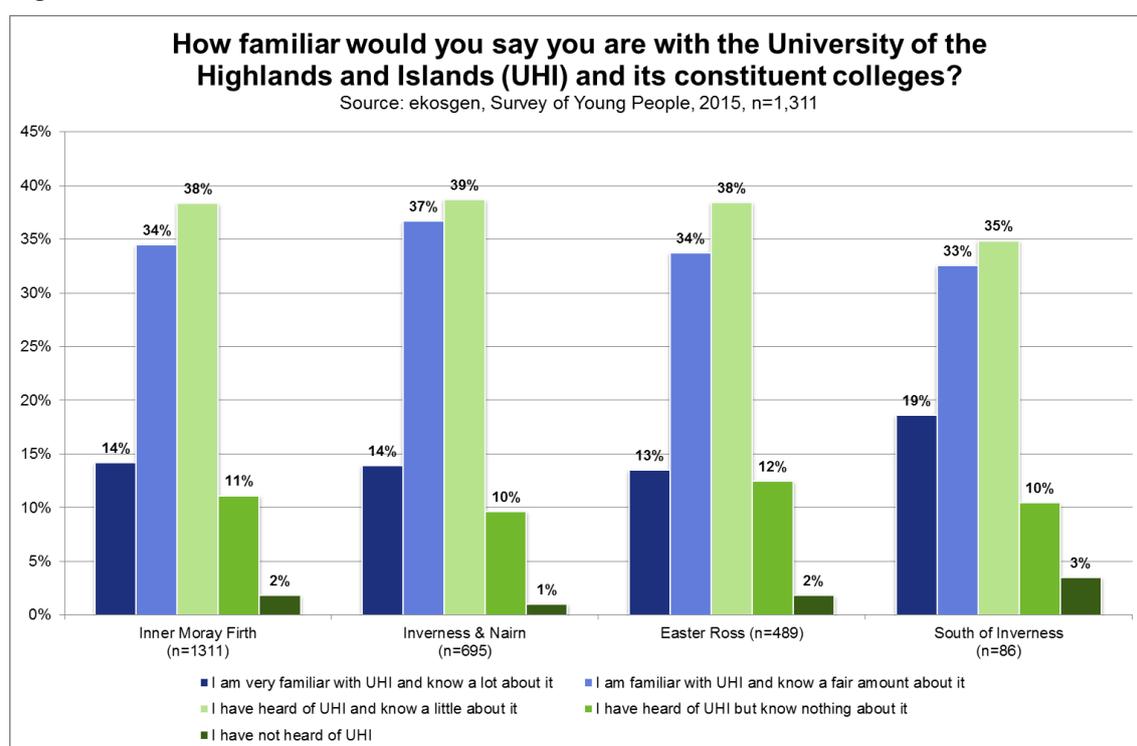
olds are most likely to agree that there are a wide range of FE/ college courses available and that studying in the H&I is affordable. University/ college students generally have a more favourable view of the education offer compared to other groups, although the range of post-graduate opportunities available is one exception.

Awareness of UHI and its offer

3.5 Due to its strong presence in Inverness, awareness of UHI is higher in the Inner Moray Firth than it is in the H&I overall; nearly nine in 10 say they know at least a little about UHI, compared to just over four in five across the region. Awareness is slightly greater in Inverness and Nairn (89%) than in Easter Ross and the south of Inverness (both 86%).

3.6 Awareness of UHI is highest amongst students (96% know at least a little about UHI), compared to 92% of those in employment/ self-employment and 80% of school pupils.

Figure 3.2



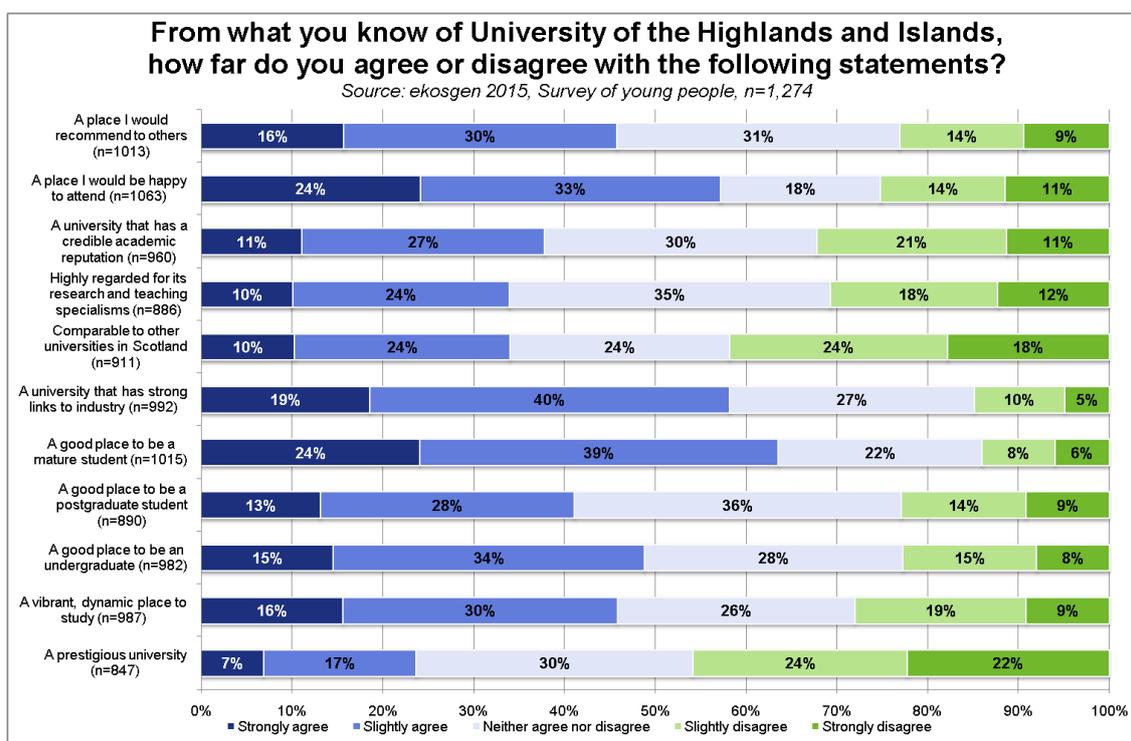
3.7 UHI is seen as a good place to be a mature student by 63%, in line with the regional average of 64%. A lower proportion view UHI as a good place to be a postgraduate student (41% compared to 43% regionally) or as a good place to be an undergraduate student (49%, in line with the H&I-average of 48%).

3.8 Young people in the Inner Moray Firth have a less favourable view of UHI's credibility and reputation than those across the H&I as a whole. In all, 38% agree that UHI has a credible academic reputation (below the 42% regionally), 34% that it is highly regarded for its research and teaching specialisms (36% regionally), and just under a quarter (24%) that it is a prestigious university (26% across the H&I). However, around a third (34%) consider it comparable to other universities in Scotland, in line with the regional average (35%).

3.9 Despite this, over half of young people in the Inner Moray Firth (57%) would be happy to attend UHI (in line with the regional average) and 46% would recommend it to others (slightly

below the 48% across the H&I). Further, 46% agree that it is a vibrant, dynamic place to study, in line with the regional average.

Figure 3.3

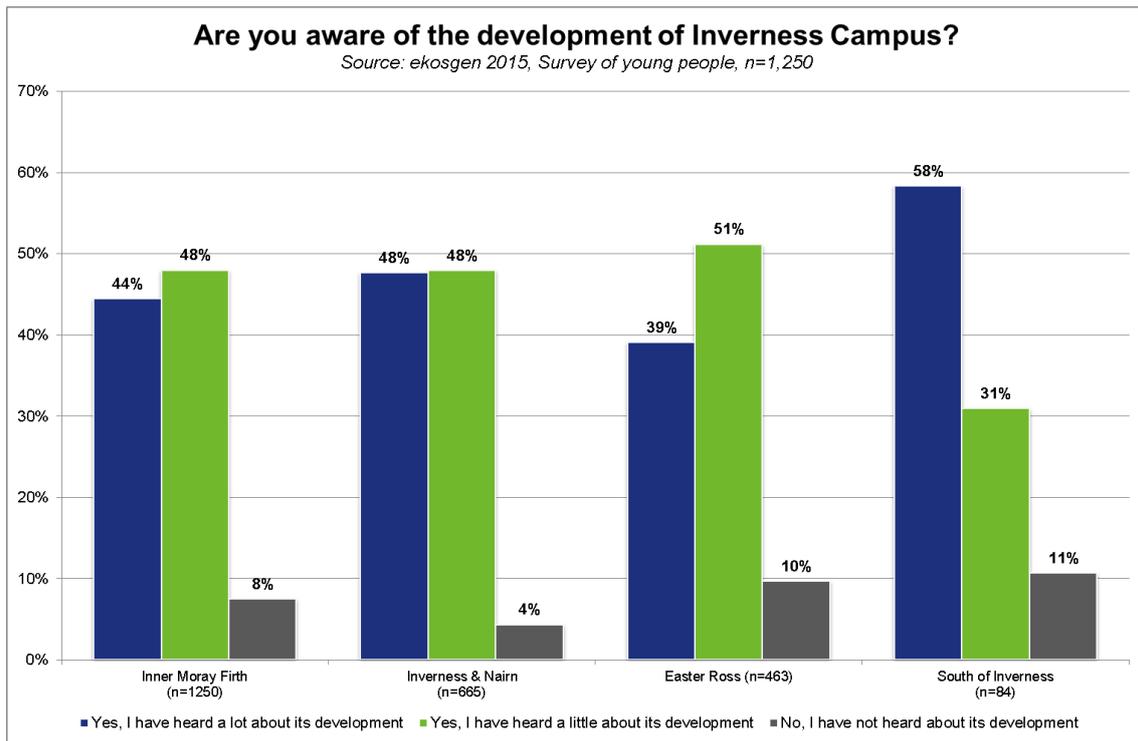


Inverness Campus

3.10 Inverness Campus, which will see Inverness College UHI co-located with centres for business and research, opened in May 2015. More than nine in 10 young people in the Inner Moray Firth know at least a little about the Campus which, given its location in the area, is considerably higher than the 58% regionally. This is highest in Inverness and Nairn (96%), falling slightly to 90% in Easter Ross and 89% south of Inverness (although still significantly higher than the regional average).

3.11 Young people in the Inner Moray Firth are most positive about the links between education, business and research at the Campus and the opportunities it offers for young people embarking on their careers (62% rating these positively, slightly above the regional average of 60%). Further 58% agree that the Campus offers a 'city university' experience for young people in the H&I, although this is just below the 60% across the region. In all, six in 10 would be happy to attend (61%, higher than the 57% across the region) and 57% would recommend it to others (five percentage points higher than the regional average). Further, around half agree that the Campus's links to business and research could help them to realise their career aspirations (49%, compared to 46% across the H&I).

Figure 3.4



Graduate placements

3.12 Whilst more than half (54%) consider that undertaking a graduate placement would improve their chances of securing employment in the region, fewer consider that there are a wide range of placement opportunities (34%), and that there are sufficient placement opportunities in more rural areas (33%). This is a broadly similar perception to the views of young people across the H&I.

3.13 Awareness of the ScotGrad programme is also in line with the regional average (78% have not heard of it, compared to 79% regionally). 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, and encouraging young people to stay in the Highlands and Islands. It aims to help overcome market failures around graduate recruitment and innovation, which tend to be particularly severe in remote rural areas.

4 Working in the Inner Moray Firth

4.1 This section identifies what young people in the Inner Moray Firth 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

Apprenticeships

4.2 As is the case across the H&I, opportunities for apprenticeships are perceived most positively of all the employment-related factors identified in the survey, with just under half rating these as either quite or very good. Whilst this is in line with the H&I average (49%) there are sub-area variations. Those in Inverness and Nairn are more likely to rate opportunities positively (56%), while those south of Inverness (45%) and Easter Ross (43%) are less positive (and less so than the regional average). As with the H&I as a whole, optimism about apprenticeship opportunities decreases with age (from 53% for those aged 15-18 years, to 48% amongst 19-24 year olds and 43% for 25-30 year olds).

Self-Employment Opportunities

4.3 Almost four in 10 (38%) young people in the Inner Moray Firth area rate self-employment opportunities positively, just below the H&I average (39%). Those in Inverness and Nairn (40%) are most positive, while those in Easter Ross (36%) and south of Inverness in particular (30%) less so.

4.4 Optimism regarding self-employment opportunities increases with age. In all, 33% of 15-18 year olds rate opportunities positively, rising to 37% of 19-24 year olds and 48% of those aged 25-30. Of the different status groups, university/ college students are most positive (45% rating opportunities as quite/ very good), compared to 41% of those in employment/ self-employment and 33% of school pupils.

Opportunities for Personal Development Locally

4.5 Opportunities for personal development locally are also rated relatively highly amongst the employment-related factors, with four in 10 (40%) rating these as quite or very good, above the H&I average of 37%. Within the Inner Moray Firth, those in Inverness and Nairn rate opportunities more favourably than average (45%). In Easter Ross, this proportion is 35%, falling to 27% for those south of Inverness.

4.6 Young people aged 15-18 years are most positive about local personal development opportunities, with 42% rating these favourably, compared to 37% of those aged 19-24 and 39% of 25-30 year olds.

Local Employment Opportunities

4.7 Despite employment growth in the Inner Moray Firth area in recent years, less than four in 10 young people think there are good local employment opportunities (37%) although this is above the H&I average of 35%. Those in Inverness and Nairn are most positive (40% rate opportunities favourably), however this falls to 36% in Easter Ross and just 20% south of Inverness. Similar to the regional pattern, young people become *less* optimistic about employment opportunities with age (and life stage), with 38% of those aged 15-18 rating these as quite or very good, compared to 37% of 19-24 year olds and 35% of 25-30 year olds.

Diversity of Employment Opportunities

4.8 Fewer young people think there is a good *diversity* of employment opportunities, just one third (33%), although this is still above the H&I average of 29%. Again, this is highest in the employment centre of Inverness and Nairn (34%), falling to 32% in Easter Ross and 25% in the south of Inverness. School pupils are the most optimistic about the diversity of employment opportunities, with over a third (35%) rating these as quite or very good, compared to 33% of university/ college students and 31% of those in employment/ self-employment.

Career Progression Locally

4.9 Local career progression opportunities are also rated as good by less than a third, although at 31% this is again higher than the regional average of 29%. The pattern is the same where opportunities are seen more favourably by those from Inverness and Nairn (33%), when compared to Easter Ross (31%) and where the proportion is much lower for those south of Inverness (20%).

Pay Levels

4.10 Around a quarter of young people in the Inner Moray Firth rate pay levels positively, and this is below the regional average of 27%. For Easter Ross, the proportion is 28%, just above the regional average, but it falls to 25% in Inverness and Nairn and just 15% in the south of Inverness. Again, optimism generally reduces with age and life stage, for example 31% of school pupils rate these favourably, falling to 24% of university/ college students and 21% of those in employment/ self-employment.

Figure 4.1

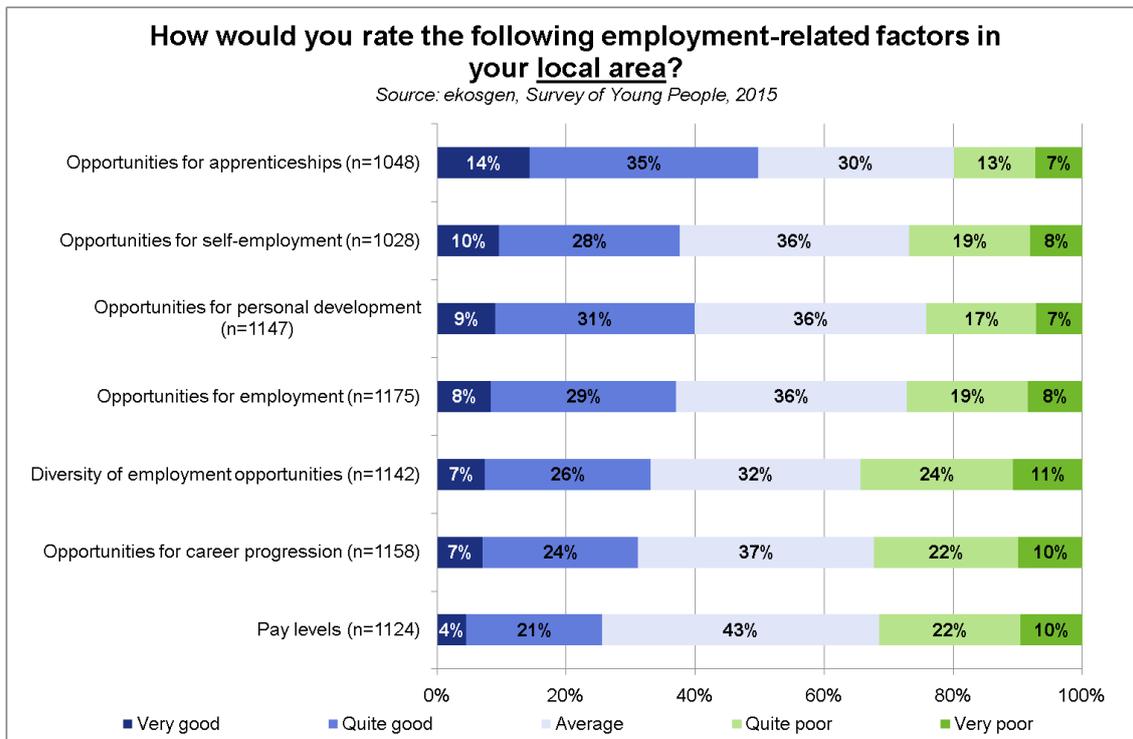
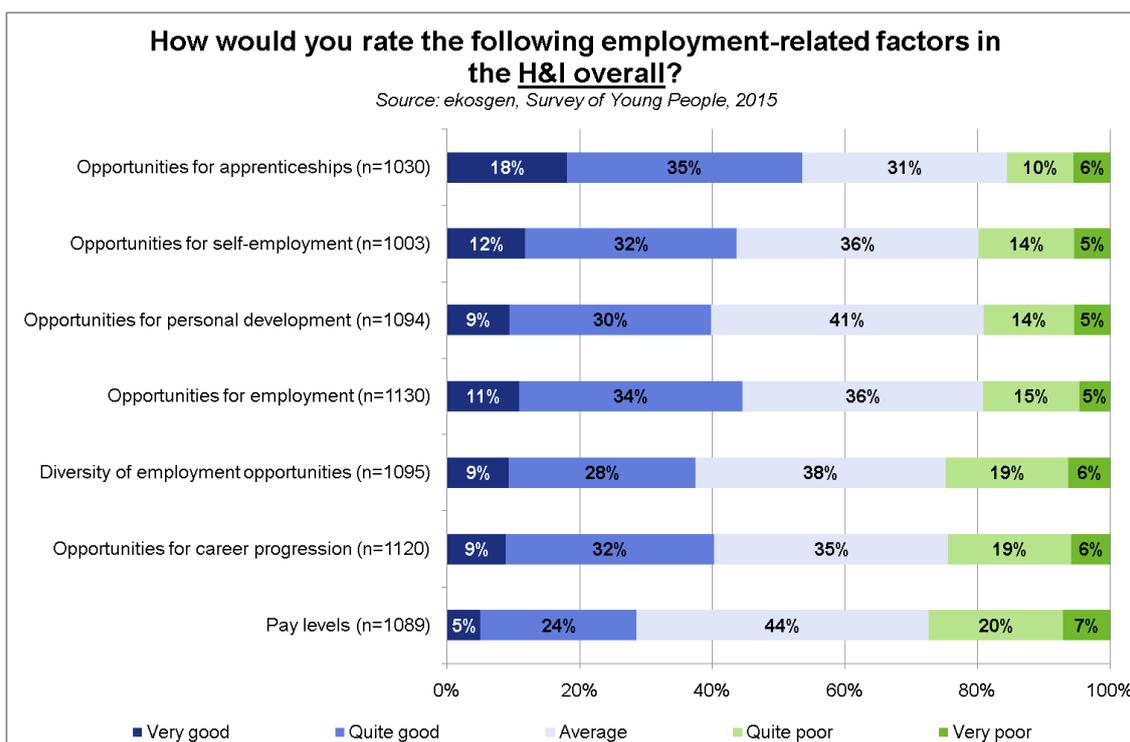


Figure 4.2



Employment Related-Factors in the H&I

4.11 Young people in the Inner Moray Firth rate all the employment-related factors more positively in the H&I overall than in their local area. This is most pronounced for opportunities for career progression (nine percentage points higher for regional compared to local opportunities), opportunities for employment (an eight percentage point difference) and opportunities for self-employment (a six percentage point difference).

4.12 Differentials are mainly a result of the poorer perceptions amongst those south of Inverness. This is particularly acute for opportunities for employment (with 20% south of Inverness perceiving there to be good local opportunities but 43% thinking there are good regional opportunities), and opportunities for career progression (20% versus 36%).

4.13 Local and regional opportunities for apprenticeships are rated the most favourably of all the factors amongst those from Inner Moray Firth, and pay levels the least favourably.

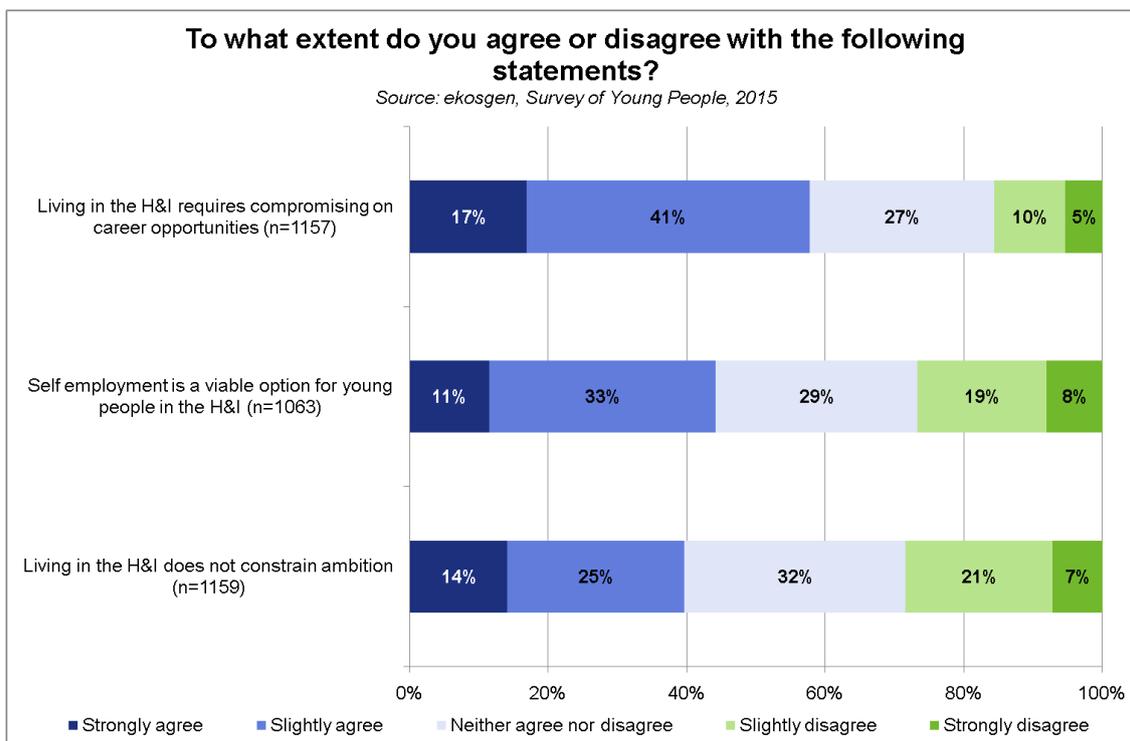
4.14 In all, 58% of young people in the Inner Moray Firth either strongly (17%) or slightly (41%) agree that living in the H&I requires compromising on career opportunities, just below the regional average (60%). There is little variation by sub area. Those aged 19-24 years are more inclined to agree with this statement (65%), compared to 57% of 25-30 year olds and 51% of 15-18 year olds.

4.15 Just over four in 10 (44%) strongly (11%) or slightly (33%) agree that self-employment is a viable option for young people in the H&I, slightly below the regional average (46%). Again there is little variation by sub-area. Young people aged 25-30 are most likely to agree (56%), falling to 37% for 19-24 year olds and 40% for those aged 15-18.

4.16 Around four in 10 agree that living in the H&I does not constrain ambition, in line with the 39% across the H&I. This is slightly higher south of Inverness (43%) than in the other sub-

areas. The percentage agreeing is highest amongst 25-30 year olds (41%), compared to 36% of 19-24 year olds and 37% of 15-18 year olds.

Figure 4.3



Ideal place to work

4.17 Overall, just under half of young people in the Inner Moray Firth (45%) would like to work in the H&I, slightly above the 44% for the region overall. Of these, 28% wish to work locally and 17% elsewhere in the H&I (compared to 29% and 15% across the H&I).

4.18 In all, just under a quarter (24%) would like to work in Scotland but outside the H&I (as would 26% regionally: 14% in the Central Belt, 2% in Aberdeen and 8% elsewhere in Scotland. Similar to the H&I overall, 7% would like to live elsewhere in the UK and 22% elsewhere in the world.

4.19 Table 4.1 shows where young people would ideally like to work by sub-area. Those in Inverness and Nairn have the strongest connection to their local area, with 35% wishing to work locally, while this falls considerably for those from Easter Ross (21%) and for those south of Inverness (17%) although a higher proportion in these areas would like to work somewhere in the H&I). Those living south of Inverness are more likely to want to work elsewhere in the UK (11%, compared to 7% across the Inner Moray Firth), while those in Easter Ross are more inclined to want to work elsewhere in the world (25%, compared to 22%).

Table 4.1: Desired Place to Work by Sub-Area

	Inner Moray Firth (n=1212)	Inverness & Nairn (n=638)	Easter Ross (n=455)	South of Inverness (n=83)
Local area*	28%	35%	21%	17%
Somewhere in the H&I	17%	13%	21%	25%
Central Belt	14%	14%	13%	12%
Aberdeen	2%	3%	3%	1%
Elsewhere in Scotland	8%	7%	8%	12%
Elsewhere in the UK	7%	7%	6%	11%
Elsewhere in the world	22%	19%	25%	20%
Other	2%	2%	3%	1%

Source: *ekosgen, Survey of Young People, 2015*; * current home town/village

Please note, percentages may not sum due to rounding.

4.20 Two-thirds of young people in employment or self-employment would like to work either locally (46%) or elsewhere in the H&I (19%). In keeping with the regional picture, school pupils are least likely to want to work locally (13%) or elsewhere in the H&I (13%) and are most likely to want to work elsewhere in the UK (11%) or elsewhere in the world (30%).

4.21 As is the case regionally, the local area becomes a more attractive place to work with age/ life stage. Over half (53%) of 25-30 year olds wish to work locally, and 19% elsewhere in the H&I; this decreases to 32% and 19% amongst 19-24 year olds; and further still to 14% and 15% amongst 15-18 year olds. Those aged 15-18 are more likely to want to work elsewhere in Scotland (12% versus 6% of 19-24 year olds and 4% of 25-30 year olds), elsewhere in the UK (10% compared to 4% and 3%) and elsewhere in the world (28%, compared to 20% and 9%).

4.22 Table 4.2 (below) compares the percentage of those wishing to work locally alongside the proportion thinking there is a good *diversity* of local employment opportunities, to provide an indication of perceived supply of diverse jobs versus demand. The Inner Moray Firth is the only area across the H&I, where the percentage rating the diversity of employment opportunities favourably is *greater* than the percentage that wishes to work locally.

4.23 Interestingly, however, the Inverness and Nairn sub-area is the only one in the Inner Moray Firth where fewer think there are diverse opportunities than are seeking to work there. This is driven by the higher proportion that is seeking to stay locally, which at 35% is well above the Inner Moray Firth average. While the proportion rating the diversity of employment opportunities is slightly lower in Easter Ross (32%) and south of Inverness (25%), the proportion wishing to work locally is significantly lower, creating the larger differentials (with percentage point differences of +11 and +8 respectively).

Table 4.2

Inner Moray Firth 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
Inverness and Nairn	35%	34%	-1
Easter Ross	21%	32%	+11
South of Inverness	17%	25%	+8
Overall Inner Moray Firth average	28%	33%	+5

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

Views on H&I Growth Sectors

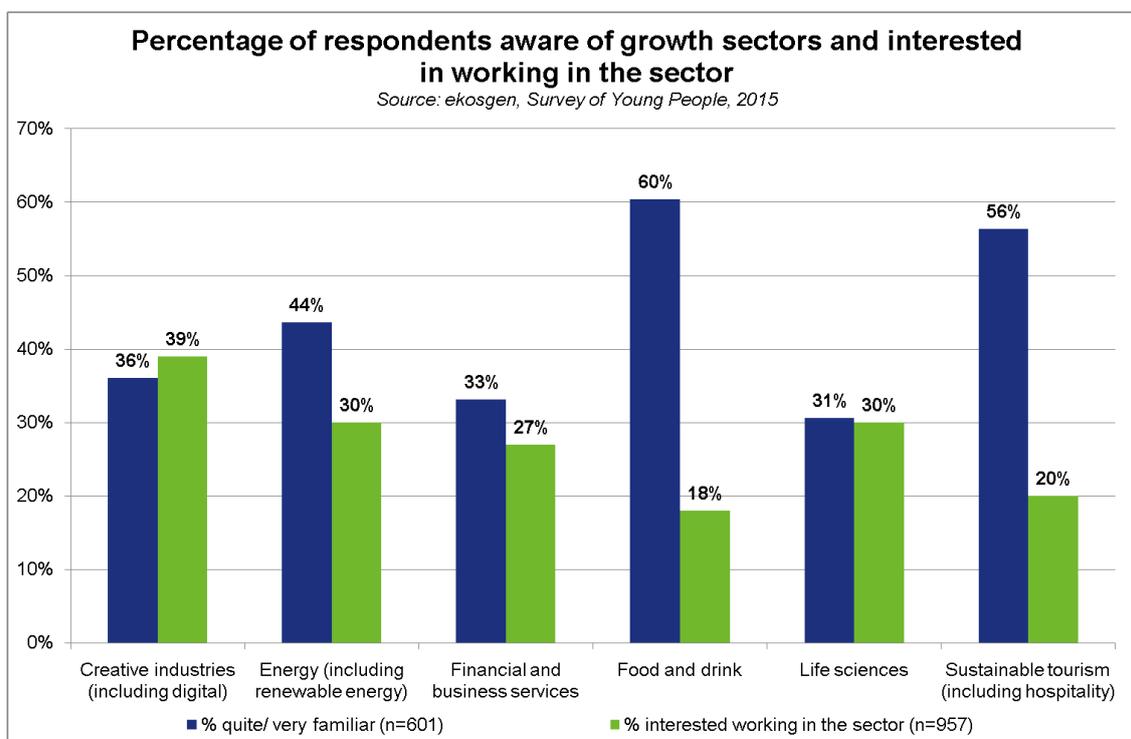
4.24 HIE's Operating Plan recognises that the region's natural assets, ambition, skills base and cultural background provide a range of opportunities to develop a vibrant sectoral economy.¹⁹ HIE's growth sectors - *Financial and business services; Creative industries (including digital); Sustainable tourism (including hospitality); Food and drink; Life sciences; and Energy (including renewable energy)* are aligned to the key sectors identified in Scotland's Economic Strategy, but with key regional specialisms under each sector.

4.25 Awareness of growth sectors in the Inner Moray Firth is broadly similar to that across the H&I. The most well-known sector in the Inner Moray Firth is Food and drink (60%, compared to 62% regionally), followed by Sustainable tourism (56% versus 60%), and Energy (44%, versus 45%). Awareness of the Creative Industries is slightly lower than the regional average (36%, versus 38%).

4.26 Creative industries is the most desirable sector for the Inner Moray Firth's young people, and the only sector where the percentage interested in working in the sector (39%), outstrips awareness of the sector (36%) This is followed by Energy (30%), Life sciences (30%) and Financial and business services (27%). Just one fifth, or less, are interested in working in Sustainable tourism (20%) or Food and drink (18%).

4.27 Figure 4.4 compares levels of awareness of growth sectors amongst young people in the Inner Moray Firth with interest in working in the sector. The greatest disparities are in Food and drink (60% are awareness versus 18% that are interested), Sustainable tourism (56% versus 20%) and Energy (44% versus 30%).

Figure 4.4



¹⁹ HIE (2014) Building Our Future: Operating Plan 2014-2017

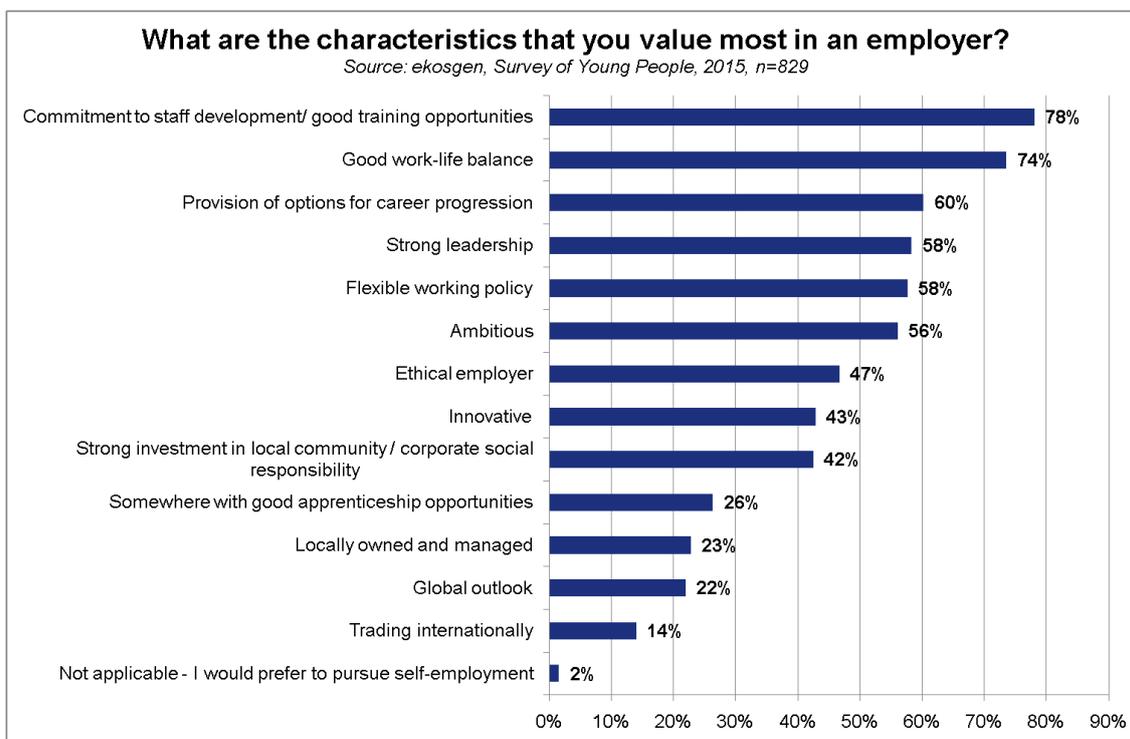
Desired Qualities in Employers

4.28 Young People in the Inner Moray Firth have broadly comparable views to those in the rest of the H&I on what they value in employers, with the most important being a commitment to staff development and training (important to 78%, marginally higher than the regional average of 76%). A similar proportion value a good work-life balance (74% again in line with the regional average). They also value provision for career progression (60% compared to 58%), strong leadership (58%, compared to 57%) and an ambitious employer (56% in both). Flexible working policies are also seen as important by 58%, compared to 56% regionally).

4.29 As is the case across the region, ethical business practices are relatively highly valued by young people in the Inner Moray Firth, with 47% valuing an ethical employer (compared to 44% regionally), 42% a strong investment in the local community/ corporate social responsibility (versus 44%) and 23% a locally owned and managed business (compared to 27%). A global outlook (22% both locally and regionally) and international activities (14%, compared to 12%) are least desired.

4.30 Those from Inverness and Nairn are more likely to value an employer that offers a good work-life balance (76%) compared to those in Easter Ross (70%) or south of Inverness (70%); an employer providing options for career progression (65%, compared to 53% and 45%); and an employer that is committed to staff development/ good training opportunities (81%, compared to 73% and 77%). Those living south of Inverness are less likely to value an innovative employer (28%, compared to 42% in Inverness and Nairn and 46% in Easter Ross); a flexible working policy (44%, compared to 60% and 56% respectively); strong investment in the local community/ Corporate Social Responsibility (36%, versus 41% and 45%) and an employer that offers good apprenticeship opportunities (20%, compared to 26% and 29%).

Figure 4.5



5 Life aspirations in the Inner Moray Firth

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 the Inner Moray Firth. 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 Inner Moray Firth 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 people²⁰ 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 those in the H&I. This is also true for young people in the Inner Moray Firth.

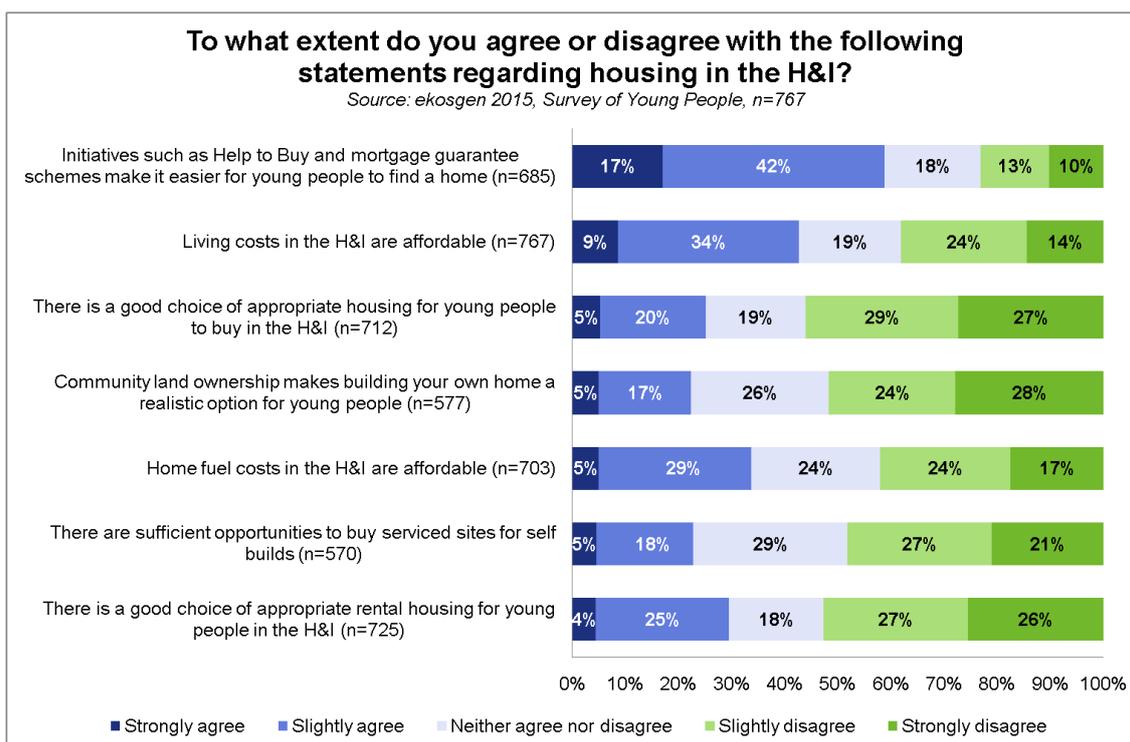
5.3 Just one in four (25%) young people in the Inner Moray Firth thinks there is a good choice of appropriate housing to buy, (26% regionally), and over half (56%) disagree. A slightly higher proportion (29%) thinks there is a good choice of housing to rent, still less than one in three, although in line with the regional average. Those in Inverness and Nairn (26% agreeing there is good choice to buy/ 30% a good choice to rent) and Easter Ross (24%/ 31%) view availability higher than those south of Inverness where just 20% consider there to be a good choice to buy and 16% a good choice to rent.

5.4 Overall, living costs in the H&I are deemed slightly more affordable by those from the Inner Moray Firth (43%) than regionally (41%), although a large proportion (38%) disagree. This is felt most acutely in Inverness and Nairn, where just a quarter (26%) regard costs as affordable, and more than half (54%) do not.

5.5 Around one in five young people (22%) in the Inner Moray Firth feel that community land ownership makes building your home a more realistic option; below the regional average (28%). Further, in line with views across the H&I, just under a quarter feel that there are sufficient opportunities to buy serviced sites for self-build, although this was lower south of Inverness (at just 10%).

²⁰ 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 As is the case across the H&I, transport is a key issue for young people in the Inner Moray Firth, with less than half of survey respondents rating the availability or affordability of any of the modes of transport as good. Overall, availability is rated more favourably than affordability.

5.7 The availability of **train travel** is regarded more favourably by young people in the Inner Moray Firth than other parts of the H&I, rated positively by 43% compared to 35% regionally. Affordability of train travel, while regarded less positively is in line the regional average (24% versus 23%).

5.8 The availability of **bus travel** is rated positively by 39% of young people in Inner Moray Firth, in line with the regional average (40%). However, a lower proportion rate bus travel as affordable (30% compared to 34% regionally).

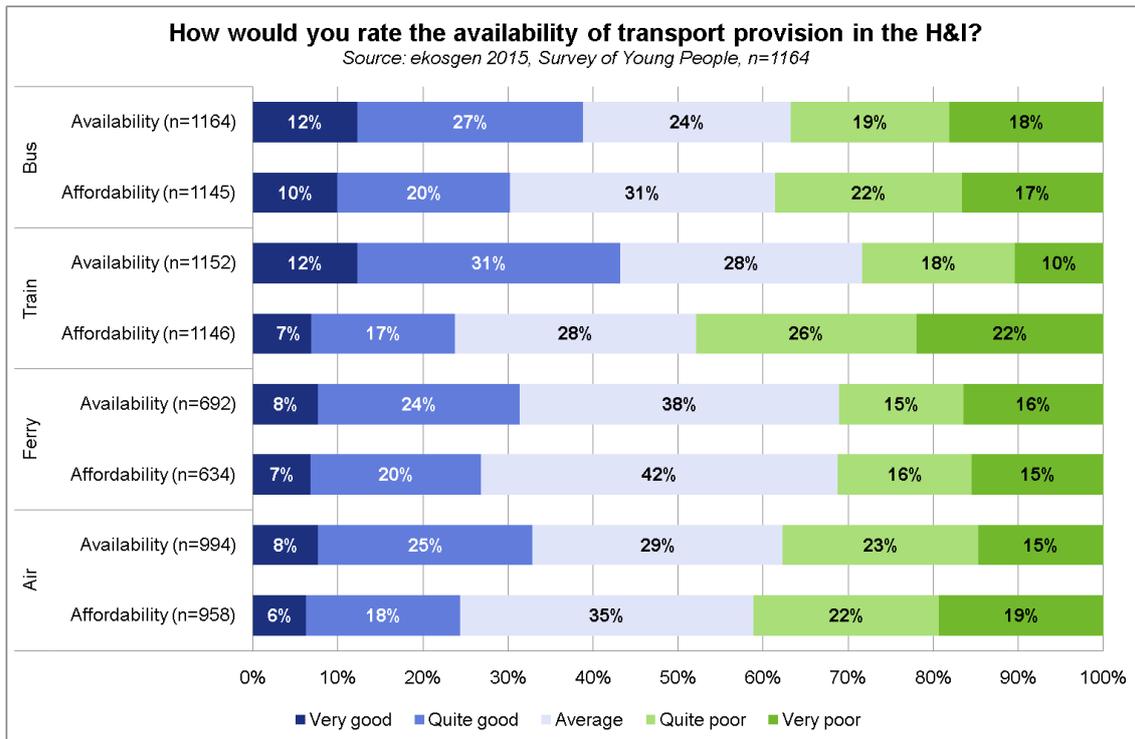
5.9 Around a third of respondents in the Inner Moray Firth rate the availability of **air travel** positively, in line with the regional average, while affordability is rated more favourably than regionally (24% versus 19%). With Inverness Airport located at Dalcross, eight miles north east of Inverness city, air travel is more available to young people from Inverness and Nairn than those from Easter Ross and south of Inverness.

5.10 The availability of **ferry travel** is rated positively by three in 10 young people, well below the regional average for the ferry transport (42%). However, given the location of the Inner Moray Firth, ferry use to/from the area is minimal.

5.11 Young people's satisfaction with transport availability and affordability varies by sub-area, with higher levels of satisfaction in Inverness and Nairn and lower levels amongst those from south of Inverness, across all modes of transport. In particular, the availability of train

services is rated more highly by those in Inverness and Nairn (51% say this as good) and more poorly by those from south of Inverness (where 22% think this is good).

Figure 5.2

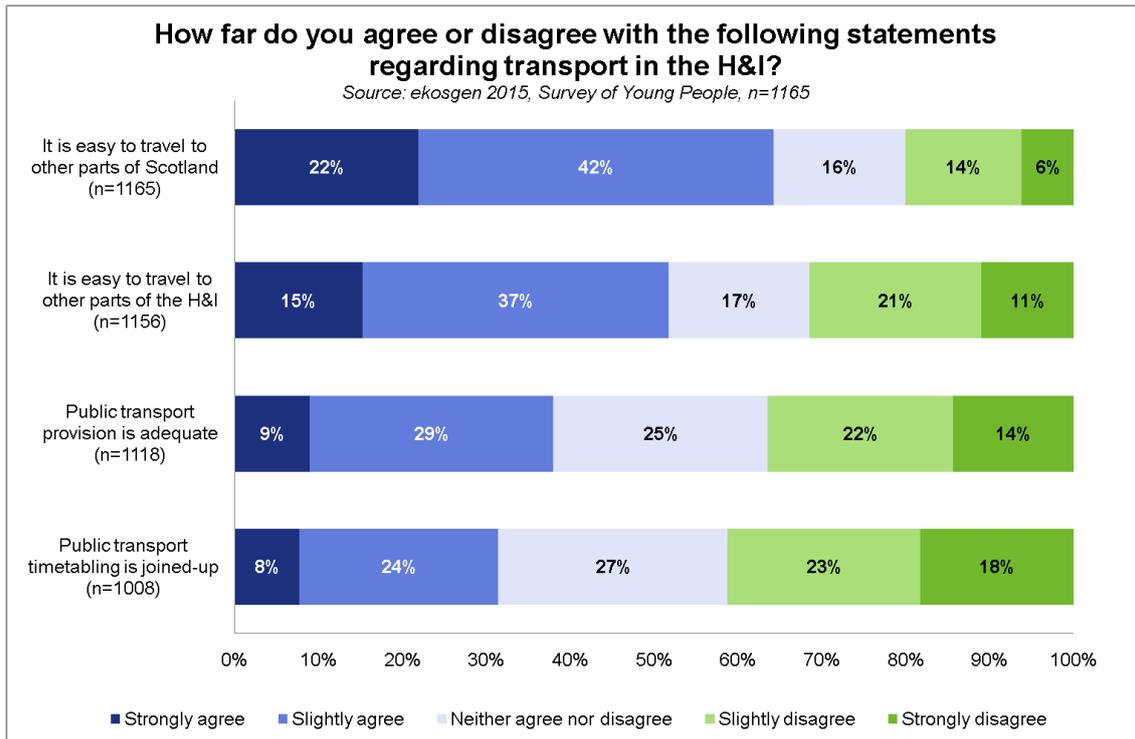


5.12 Young people in the Inner Moray Firth feel more connected to other parts of the H&I and Scotland than those in other parts of the region. Almost two thirds agree that it is easy to travel to other parts of Scotland (64%), and just over half (52%) that it is easy to travel to other parts of the H&I (both higher than the regional averages of 56% and 49% respectively). Those from Inverness and Nairn and Easter Ross regard the ease of travel out from their local area more positively than those from south of Inverness.

5.13 In line with the views of young people from across the H&I, the timetabling of public transport is perceived to be poor, with around three in 10 (32%) agreeing that timetabling is joined-up, while four in 10 (41%) disagree. There are particularly low levels of satisfaction amongst young people from south of Inverness (27% rating this positively).

5.14 Overall, less than one in four (38%) rate transport provision in the H&I as adequate; lower than the regional average (40%). Again, satisfaction was particularly low amongst young people south of Inverness (with 26% rating public transport as adequate).

Figure 5.3

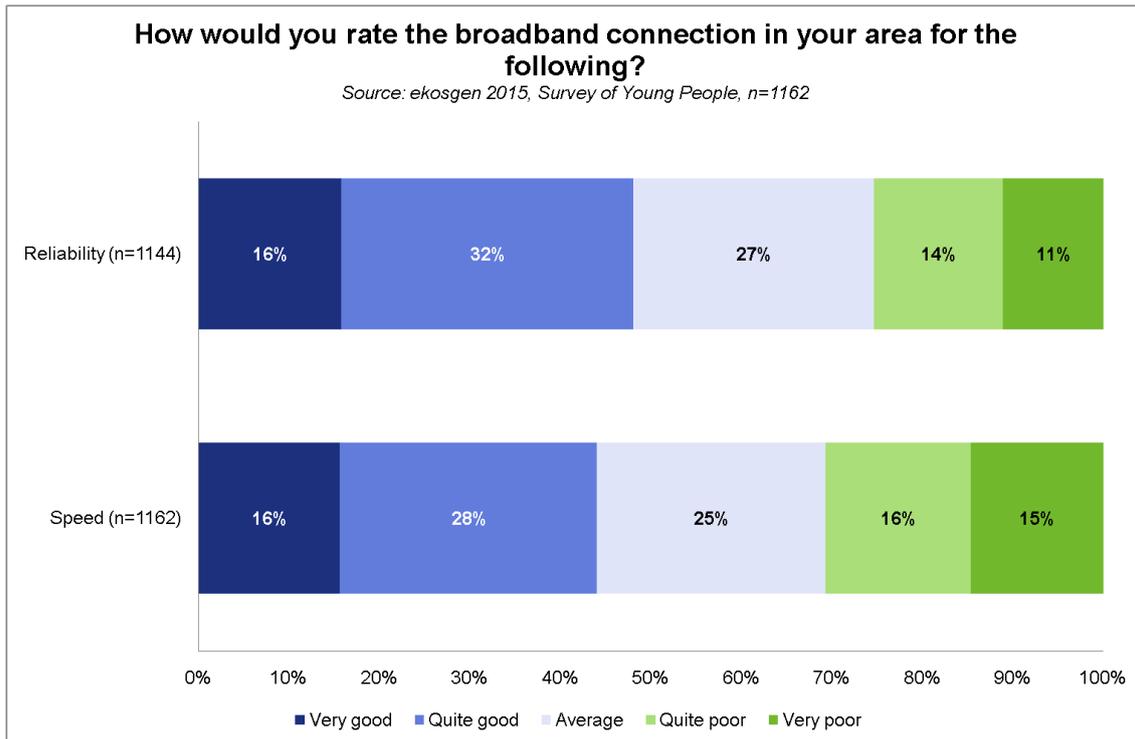


Digital Connectivity

5.15 In all, 97% of young people in the Inner Moray Firth have access to broadband internet (standard broadband or NGA broadband), slightly above the H&I average of 96%. Although the majority of this is standard broadband, just under one fifth (19%) had access to NGA broadband at the time of the survey (April 2015), compared to 14% regionally. Across the H&I there is fairly limited awareness of the forthcoming NGA broadband roll out and this is also the case in the Inner Moray Firth, where 57% of young people has heard about the roll out (56% across the H&I). Awareness of the roll out was highest in Inverness and Nairn (63%) and lowest amongst those from south of Inverness, (43%).

5.16 Broadband *reliability* in the Inner Moray Firth rates more favourably than elsewhere in the H&I, with around half of young people rating it positively (48% compared to 43% regionally). Broadband *speeds* are also rated positively by 44%, above the regional average (38%). Within the Inner Moray Firth satisfaction varies, with higher levels in Inverness and Nairn (54% reliability/ 51% speed) and Easter Ross (44% reliability/ 40% speed) and below average levels amongst those from south of Inverness (30% reliability and 21% speed).

Figure 5.4

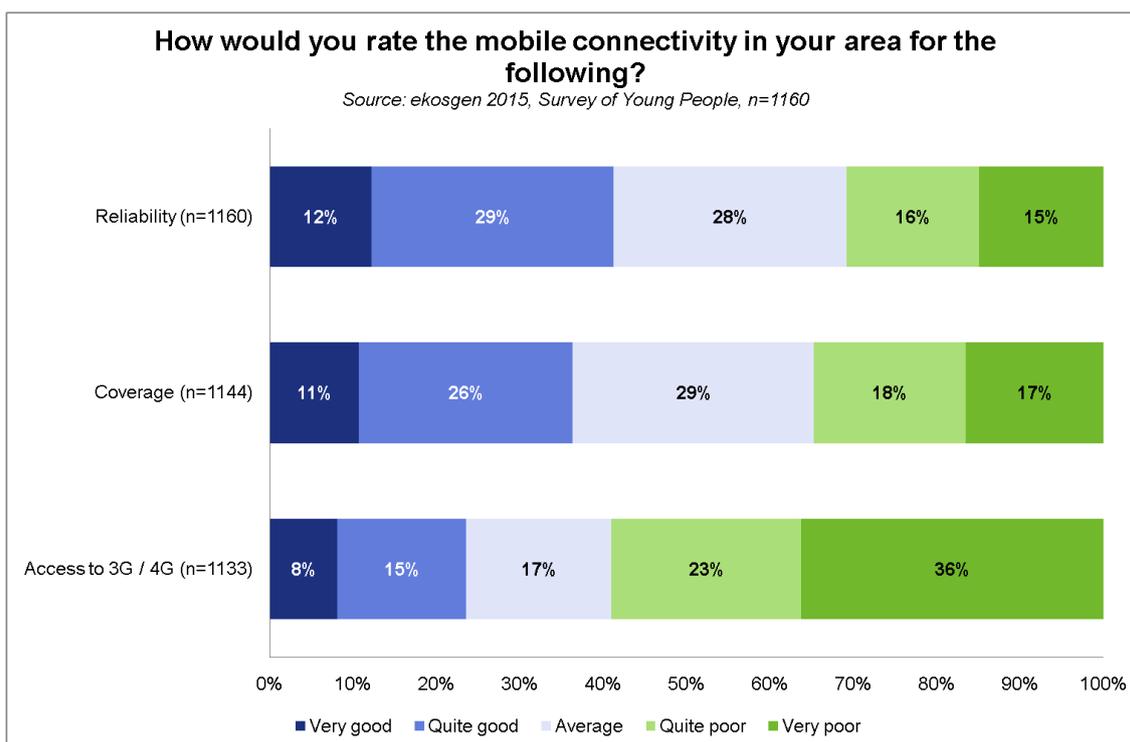


5.17 The top three key benefits of NGA broadband reported by young people in Inner Moray Firth are the same as for those across the H&I, namely: 1) better music, film and entertainment streaming 2) improved communication with family and friends and 3) better access to education and learning materials.

5.18 Mobile connectivity is rated more poorly than broadband connectivity by young people in the Inner Moray Firth, although a higher proportion than regionally perceive it to be good. Four in 10 (41%) rate mobile *reliability* positively (compared to 35% across H&I) and 37% rate mobile *coverage* positively, compared to around three in 10 regionally. Mobile reliability is perceived to be poor by those living south of Inverness (24% rating it good).

5.19 A large proportion of young people in Inner Moray Firth (59%) rate access to 3G/4G as 'poor' or 'very poor'; although this is lower than the regional average (65%). Again, access is rated most poorly by those south of Inverness.

Figure 5.5



Arts, Leisure and Culture

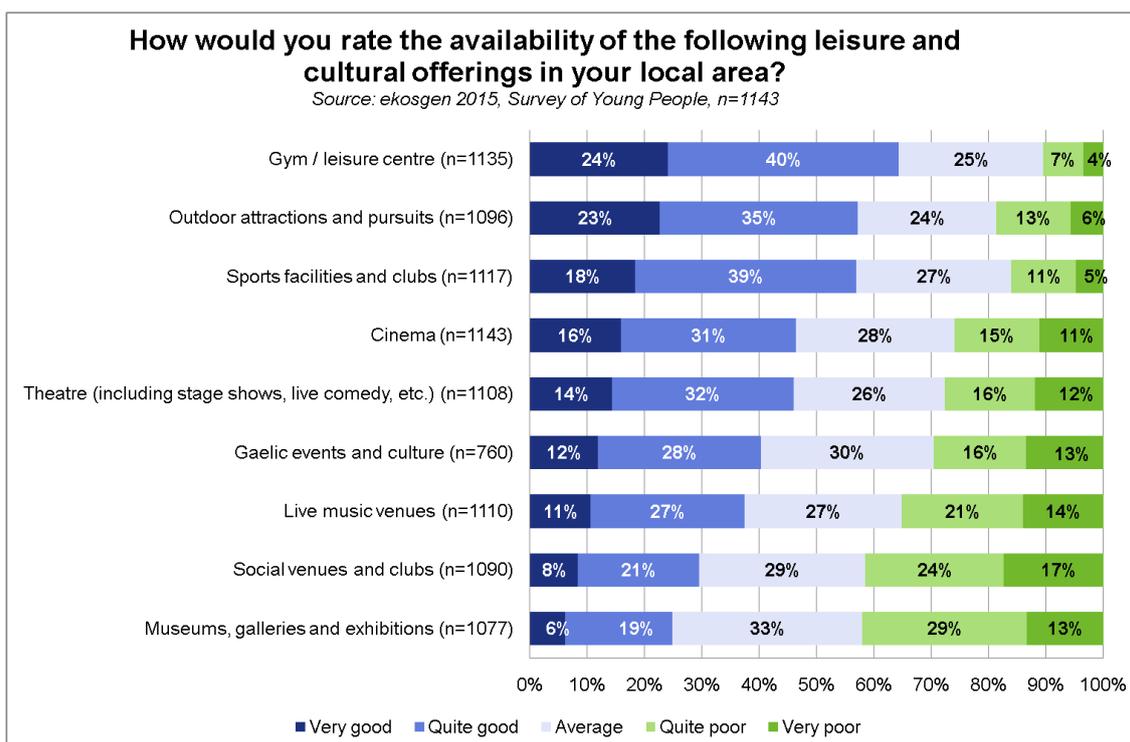
5.20 As with the H&I as a whole, there is a mixed picture on the perceived availability and strength of the arts, leisure and culture offer in the Inner Moray Firth. In general terms, however, the offer is perceived as far more available than in other parts of the H&I region.

5.21 The top three most available offers in the Inner Moray Firth are gym/ leisure centres (rated as quite or very good by 64% of young people), outdoor attractions and pursuits (with around six in 10 rating favourably) and sports facilities and clubs (57%), all above the regional averages.

5.22 Access to cinemas (47%), theatres (46%), Gaelic events and culture (40%), live music (38%) and social venues (29%) are the next most available offers, and all are rated as more available than across the H&I as a whole. Access to museums, galleries and exhibitions is the only offer perceived to be less available in the Inner Moray Firth than regionally, with 25% rating availability as 'good' or 'very good' compared to 27% across H&I.

5.23 The arts, leisure and culture offering is perceived as more available to young people in Inverness and Nairn, and least available to those south of Inverness. The exception is the availability of outdoor attractions and pursuits, where 69% of young people south of Inverness rate this as 'very good' or 'good', compared to just under six in 10 for the Inner Moray Firth as a whole.

Figure 5.6



5.24 As is the case across the H&I, there is a degree of disparity between the availability and importance of cultural offering for young people in the Inner Moray Firth. The greatest degree of mismatch is for access to live music venues and social venues and clubs where 80% consider it important, and fewer than four in 10 think it available to them. Further, 78% deem access to social venues to be important, while less than a third (29%) consider this available.

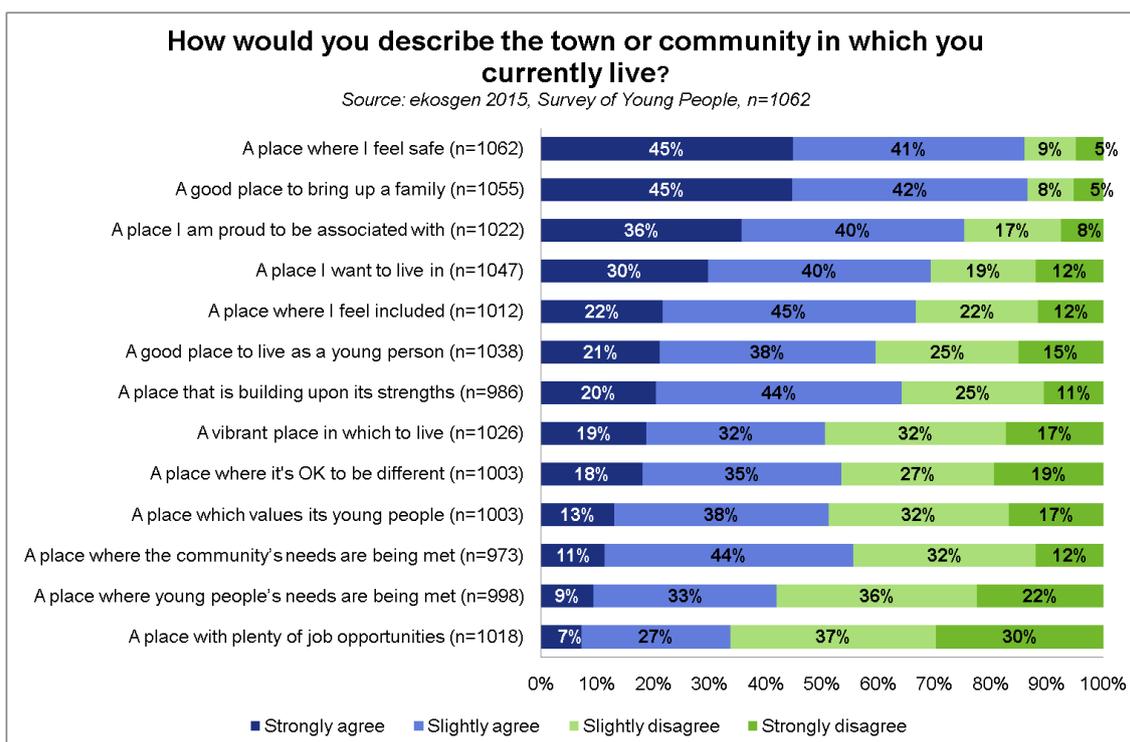
5.25 On the whole, access to cultural offers is more important to those from Inverness and Nairn and Easter Ross than to those living south of Inverness.

Community

5.26 There are some very strong and positive feelings amongst young people from the Inner Moray Firth about the place in which they live. Some three quarters are proud to be associated with their local community, compared to the regional average of 78%, and this is particularly the case in Inverness and Nairn (81%).

5.27 The vast majority of young people in the Inner Moray Firth feel safe in their local community (86%) and think that it is a good place to bring up a family (87%), both broadly in line with regional average. Around seven in 10 young people agree that the Inner Moray Firth is a place where they want to live and a similar proportion feel included in the local community (67%). In all, just over half (53%) perceive their local community as a place where it is OK to be different, marginally higher in Inverness and Nairn and south of Inverness (both 55%) than in Easter Ross (50%).

Figure 5.7



5.28 Young people in the Inner Moray Firth tend to be less engaged with their community than in the H&I overall. Just under a third (32%) attend community events (45% regionally), while 28% are members of local youth groups or clubs (32% for the H&I) and a quarter (25%) undertake volunteer work for the community (31% for the H&I). Nearly four in 10 (39%) do not participate in the community in any of these ways, higher than the regional average (29%). Young people in Inverness and Nairn are least likely to participate in their community (44% do not participate), compared to 39% south of Inverness and 33% in Easter Ross.

5.29 Whilst around six in 10 respondents reported that the Inner Moray Firth is a good place to live as a young person, (in line with the regional average), only 42% felt that young people's needs were being met, (41% regionally), particularly high in Inverness and Nairn (45%), but significantly lower south of Inverness (29%, with none strongly agreeing). Some 41% in Easter Ross feel their needs are being met.

6 Future aspirations of Young People in the Inner Moray Firth

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

Making the Highlands and Islands an Attractive Place to Live In

6.2 The top six most important themes for young people in Inner Moray Firth are the same as for the H&I as a whole, although ranked slightly differently. High quality jobs and career progression opportunities are most important to those in Inner Moray Firth (as they are across H&I), very important to 72% and 68% respectively in making the region more attractive. Indeed, the availability of high quality jobs is *the most important* issue across all areas within the Inner Moray Firth. Good access to FE/HE is rated as the third most important factor to young people across all areas within the Inner Moray Firth.

6.3 Affordable transport is the fourth most important issue for young people across H&I and Inner Moray Firth is no different, with 64% of respondents rating this as 'very important'. Affordable transport is of particular importance to young people south of Inverness, with 72% rating this as 'very important', reflecting the perceived transport challenges in the south of the area highlighted in chapter five.

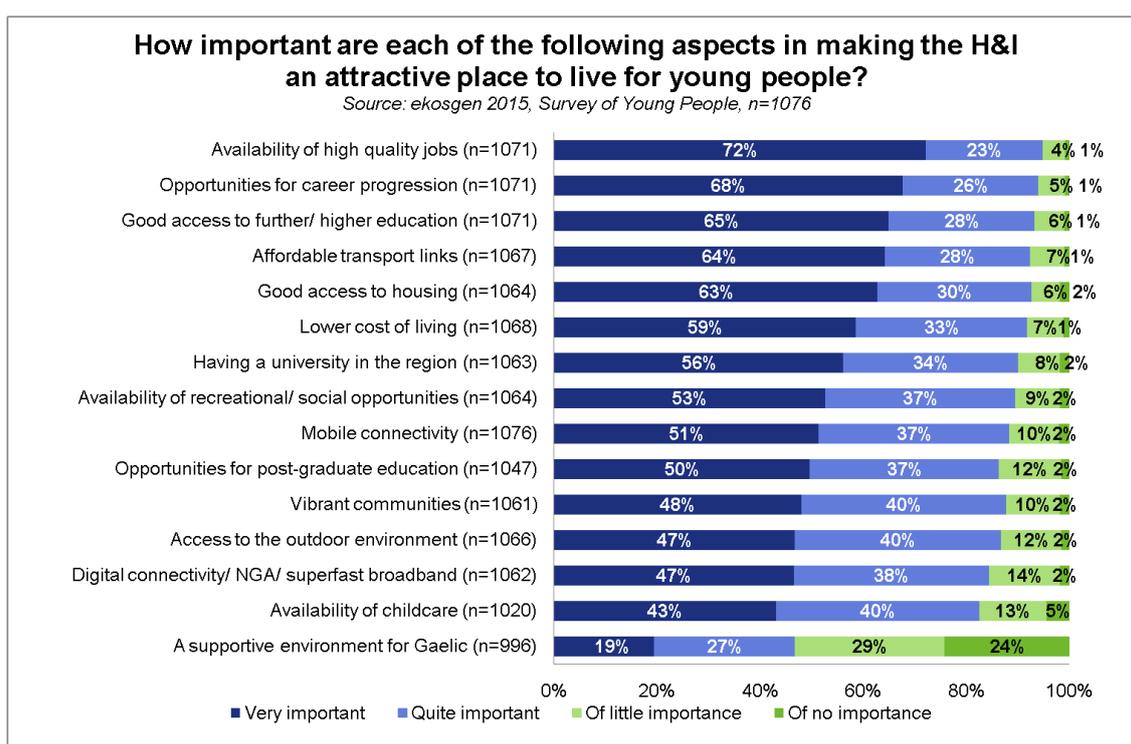
6.4 Further, access to housing and the cost of living are also important factors for young people in the Inner Moray Firth, and these are ranked as the fifth and sixth overall. These factors are of greater importance to those south of Inverness (68% and 65% rating them as 'very important' respectively), and of slightly lesser importance to young people in Easter Ross (60% and 58%).

6.5 All of the 15 themes explored in the survey were reported as important for at least 83% of young people in the Inner Moray Firth, and very important for at least 43%, with the exception of a supportive environment for Gaelic, although 46% considered this to be of some importance too.

Table 6.1

Theme	% 'Very Important'	IMF Ranking	H&I Ranking
Availability of high quality jobs	72	1	1
Opportunities for career progression	68	2	2
Good access to FE/HE	65	3	4=
Affordable transport links	64	4	4=
Good access to housing	63	5	3
Lower cost of living	59	6	6
Having a university in the region	56	7	=9
Availability of recreational/ social opportunities	53	8	8
Mobile connectivity	51	9	7
Opportunities for post-graduate education	50	10	13
Vibrant communities	48	11	12
Access to the outdoor environment	47	12	=9
Digital connectivity	47	13	=9
Availability of childcare	43	14	14
A supportive environment for Gaelic	19	15	15

Figure 6.1

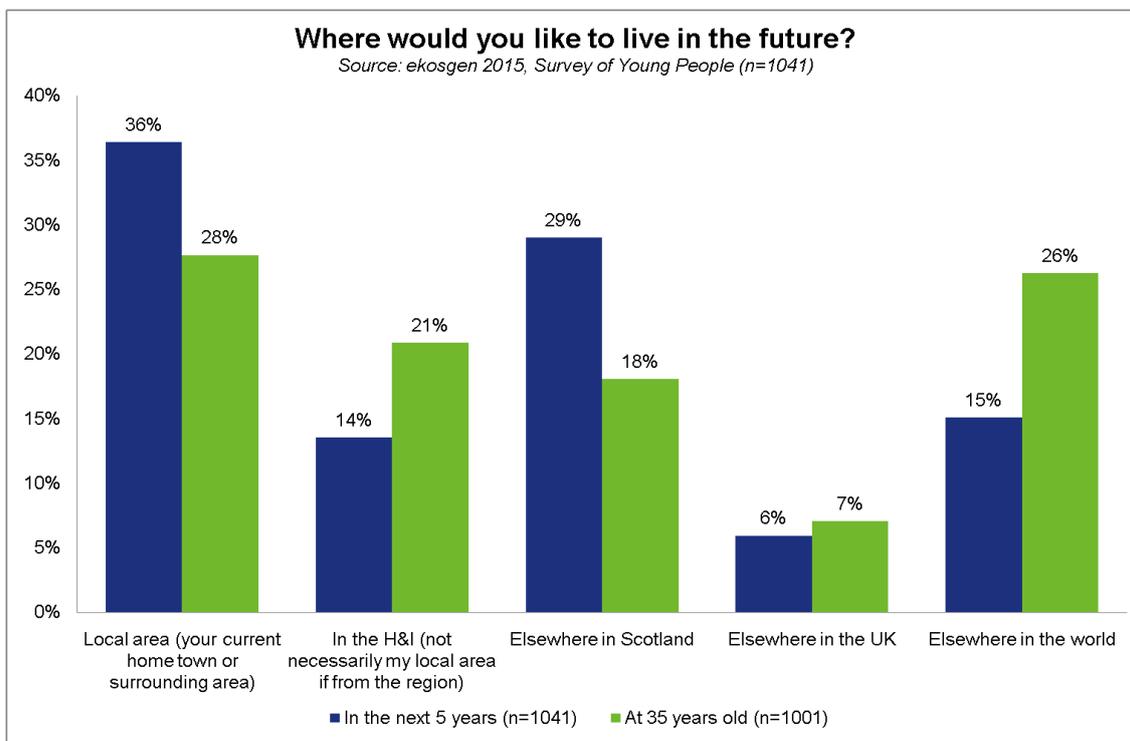


Future Aspirations

6.6 In line with the average across the H&I, 36% of young people in the Inner Moray Firth would like to be living in their local area in five years' time, although this falls to around three in 10 (28%) at 35 years old, below the regional average of 33%. However, of those who do leave their local area, more are likely to remain in other parts of the H&I later in life than the regional average (21% compared to 14%). In total, around half (49%) would like to be living somewhere in the H&I at aged 35 (51% regionally).

6.7 Future aspirations vary by geography, with young people in Inverness and Nairn more likely to want to stay within their local area for the next five years (44%), and over the longer term (33%), than is the case in Easter Ross (29% and 23%) and, particularly, south of Inverness (22% and 15%). For those from south of Inverness, just 22% wish to be living in their local area in five years' time, and 15% at 35 years old.

Figure 6.2



6.8 Approximately nine in 10 young people from Inner Moray Firth either want to be in employment (48%) or studying/furthering their education (41%) in the next five years. The desire to be in employment at 35 years old rises to two thirds (65%), in line with the average for the H&I region as a whole.

6.9 A small but significant proportion of young people (6%) wish to be running their own business in five years' time, and this increases to around one quarter (24%) at 35 years old, in line with the H&I average. This shows a certain appetite for self-employment amongst young people from the Inner Moray Firth.

6.10 Young people in Easter Ross are more likely to aspire to be in further education in the next five years (45%, falling to 40% south of Inverness and 38% in Inverness and Nairn). At 35 years old, they are more likely to want to be running their own business (28%) than is the case in Inverness and Nairn (22%) and south of Inverness (23%).

How the H&I has changed

6.11 Despite the higher than average proportion of young people with future aspirations to leave the Inner Moray Firth, 58% of young people believe the H&I is a better place to live now than it was five years ago, well above the H&I average of 51%. Only 14% felt that the H&I is not a better place to live now (marginally lower than the regional average of 15%) and 29% were unsure. This varies within the Inner Moray Firth, where almost a third (29%) of young people

south of Inverness did not think that the region has improved, significantly more than the 13% from Easter Ross and 12% from Inverness and Nairn.

6.12 Young people from the Inner Moray Firth are also positive about the future of H&I, with more than half (53%) believing that the region will be a better place to live in five years' time (again, exceeding the regional average of 46%). Those from Inverness and Nairn (55%) are slightly most optimistic about the future of the H&I than those south of Inverness (53%) and those from Easter Ross (48%).

7 Conclusions

7.1 Some 1,430 young people across the Inner Moray Firth area have given their views on their local area and the H&I. This is a very good evidence base of what young people are thinking in relation to a whole range of issues. Young people in the Inner Moray Firth in general have a strong connection to their local communities. Although a slightly lower proportion than average wish to stay locally, a higher proportion wish to remain in the H&I.

7.2 There are strong variations within the area, with those from Inverness and Nairn, and those from Easter Ross, more positive about their local area, and the extent of opportunities, while those in the south of the area perceive there to be fewer opportunities and more constraints, including infrastructure barriers such as transport and digital connectivity.

Key Summary Findings

Staying and Leaving

- More young people in the Inner Moray Firth see themselves as committed stayers than regionally (46% compared to 43%), and fewer are committed leavers. This masks considerable variation within the area: 50% from Inverness and Nairn are committed stayers, compared to 44% from Easter Ross and 35% from south of Inverness.
- Those in Easter Ross are most likely to be committed leavers, while almost one in five from the south of Inverness are reluctant leavers, well above the regional average of 13%. This is most likely linked to the lack of local employment opportunities.
- Those aged 25-30 and those in employment are more likely to be committed stayers. Whilst 44% of university/college students see themselves as committed stayers, a third are committed leavers.
- Young people in the Inner Moray Firth consider that those who stay are lucky to be able to do so, which at 62% is broadly in line with the regional proportion. A third think those who stay lack ambition, again in line with the regional average, although this rises to four in 10 south of Inverness.
- Aspiration to go to university is highest for those from Inverness and Nairn (64%) and Easter Ross (54%) and lowest south of Inverness (43%). Almost a third of those from south of Inverness aspire to FE when leaving school, almost twice the proportion from Inverness and Nairn.
- For those in Inverness and Nairn, interesting college or university courses are a stronger influence on post-school decisions relative to other areas, whereas the range of subjects at school and local work placement opportunities are more of an influence for those south of Inverness.

Education

- In all, 56% consider there to be a good educational offer in the H&I, in line with the regional average. Almost six in 10 think they are able to study locally, slightly above the regional average, and almost seven in 10 think it affordable to study in the H&I, compared to 61% regionally.

- Almost six in 10 of those south of Inverness think there is a good range of FE/college courses, and this is the highest in the Inner Moray Firth area, encouraging given the higher levels of aspiration for FE from the south. Those in Inverness and Nairn are least likely, and those in Easter Ross most likely, to agree there are good HE/university level opportunities.
- Awareness of UHI is higher than the regional average, at 87% compared to 82% regionally, and highest in Inverness and Nairn, where 89% know at least a little about UHI. There is also strong branding around Inverness Campus, as some 96% from Inverness and Nairn are aware of the development.
- In line with the regional average, more than half of young people in the Inner Moray Firth would be happy to attend UHI (57%) and 46% agree it is a vibrant, dynamic place to study. However, fewer than the regional average think that UHI has a credible academic reputation (38% compared to 42%), or that it is prestigious (24% compared to 26%).
- Inverness Campus is viewed positively, although no more so than the regional average. In all, 58% think it will offer a 'city-university' experience, compared to 60% regionally. Overall, education is important to young people in the Inner Moray Firth – good access to FE/HE ranks as the third most important factor in making the H&I a more attractive place to live, work and study, higher than its ranking of fourth most important factor across the H&I as a whole.

Employment

- Despite employment growth in Inverness and the Inner Moray Firth in recent years, less than one in four (37%) think there are good local employment opportunities, although this is marginally higher than the regional average (35%). An Inverness-effect is evident only to a modest extent, since the proportion rises to 40% amongst those from Inverness and Nairn, and falls to 36% for those in Easter Ross and 20% for those south of Inverness.
- Even fewer regard there to be a *diverse* range of employment opportunities, just one in three thinks so, although again above the regional average (29%). The pattern *within* Inner Moray Firth is similar, 34% think opportunities are diverse in Inverness and Nairn, whilst this is just 25% south of Inverness.
- The lack of local opportunity is reflected in poor prospects for career progression, albeit to a lesser extent than regionally. Just 31% think career progression opportunities are good (29% regionally), highest in Inverness and Nairn (although still just 33%) and lowest in south of Inverness (20%).
- As in many parts of the H&I, good quality jobs is ranked the most important factor in making the H&I a more attractive place to live. Pay levels are perceived to be poor by young people in the Inner Moray Firth, more so than the regional average. Just one in four think pay levels are good, and this is no higher in Inverness and Nairn.
- In all, 28% would like to work locally, compared to 29% across the H&I. This is highest in Inverness and Nairn (35%) - above the regional average - and significantly lower in Easter Ross (21%) and south of Inverness (17%).
- The proportion wishing to work locally in Inverness and Nairn is the same as those thinking there are a diverse range of opportunities; this is not the case in the rest of the Inner Moray Firth – fewer wish to work locally than think there are diverse opportunities.

- Young people in the Inner Moray Firth value employers who provide a commitment to staff development, a good work-life balance and opportunities for career development. Fewer value a global outlook in their employer, or one that trades internationally, suggesting a weaker appreciation of the benefits to business of trading outside Scotland.

Housing

- In line with the regional picture, housing is an issue for young people in the Inner Moray Firth, and just 25% think there is a good choice of housing to buy and 29% a good choice to rent. The issue is most acute south of Inverness, where just 20% think there is a good choice to buy, and 16% to rent.
- Just over a fifth (22%) agree that community land ownership makes building your own home a more realistic option – lower than the 28% regionally, and 23% agree that there are sufficient opportunities to buy serviced sites for self-build, in line with the regional average.

Transport

- Transport is an issue for those in the Inner Moray Firth, and most acute for those south of Inverness where it is perceived to be more difficult to travel to other parts of H&I or other parts of Scotland. Overall, availability of transport is rated more favourably than affordability.
- Train travel availability is rated as good by 44% ranging from more than half (51%) in Inverness and Nairn to just 22% south of Inverness. Almost four in 10 rate bus availability good, in line with the regional average of 40%, yet fewer than the average think it affordable. Air travel affordability is rated more positively by those in the Inner Moray Firth than regionally.
- Less than one in four (38%) consider public transport to be adequate, lower than the regional average (40%). Again, this is influenced by those south of Inverness where 26% think it adequate.

Digital Connectivity

- Broadband speed and reliability is rated good by more than the regional average. Almost half think reliability is good, and 44% think speed is good. There are much higher levels of satisfaction in Inverness and Nairn, and to a lesser extent Easter Ross, than south of Inverness, where fewer than the regional average rate these factors as good.
- Mobile connectivity is an issue for young people in the Inner Moray Firth, and more so than broadband. Although above the regional average, just four in 10 rate mobile coverage as good. Access to 3G/4G is considered very poor by 59%, only marginally below the 65% regionally.

Arts, Culture and Leisure

- The arts, culture and leisure offer is perceived as more available in the Inner Moray Firth than in many other parts of the region, especially so in Inverness and Nairn. The most available offers are gym/ leisure centres, outdoor attractions and pursuits and sports facilities and clubs, which are all above the regional averages.
- Cinema, theatres, Gaelic events and culture, live music and social venues are all more available than the regional average. All offers are more available to those in Inverness and

Nairn, and least available to those south of Inverness, except for outdoor attractions and pursuits which is more available in the south.

- Despite this the offer is viewed as more important than it is available. The greatest mismatch is for access to live music venues and social venues and clubs. Eight in 10 consider access to live music as important (37% available) and 78% think social venues important (29% available).

Community

- In all, three in four are proud to be associated with their community, marginally lower than the 78% regionally. Pride is slightly stronger in Inverness and Nairn (81%). Young people feel safe and see it as a good place to bring up a family.
- Rates of community involvement and engagement are below the regional average. Nearly four in 10 (39%) do not participate in the community, higher than the average for the H&I as a whole (29%). Young people in Inverness and Nairn are least likely to participate (44%), compared to those south of Inverness (39%) and in Easter Ross (33%)

Future Aspirations

- In all, 36% wish to be living in their local area in five years' time, in line with the regional average. A lower proportion, 28%, wish to be living locally aged 35, below the average of 33%. Those in Inverness and Nairn are more likely to want to stay within their local area for the next five years, and over the longer term, than is the case in Easter Ross and, particularly, south of Inverness
- Two thirds wish to be in employment in the future, in line with the proportion regionally and a quarter want to be running their own business. Almost six in 10 believe the H&I to be a better place than five years ago, well above the regional average (51%). Young people in the Inner Moray Firth are also more optimistic about the future than those across the H&I as a whole, with more than half thinking it will be better in five years' time. Those south of Inverness are least optimistic about the future.

Concluding Remarks

7.3 Young people in the Inner Moray Firth are generally positive about their local area, and think that the H&I is a better place now than it was five years ago. More are committed stayers than the regional average and there are fewer committed leavers. There are generally positive views on the education offer available, particularly for FE, and there are strong levels of pride and commitment to local areas

7.4 Overall, young people in the area are also relatively positive about local employment opportunities, diversity, career progression, and personal development when compared to those across the region. Whilst overall perceptions of employment related opportunities remain relatively modest, these are greater than elsewhere in the region.

7.5 There are considerable variations within the Inner Moray Firth area. There is perceived to be a greater diversity of employment opportunity in Inverness and Nairn than in Easter Ross and south of Inverness. Opportunities are viewed as particularly limited south of Inverness, where challenges are compounded by issues associated with weak transport links, poor digital connectivity and the high cost and low availability of housing.

7.6 In Easter Ross, a greater than average proportion wishes to leave in the short and longer-term, linked to limited local opportunities, although a similarly high proportion as those in Inverness and Nairn think the region as a whole has improved over the last five years. In the south of the area, there is a general lack of local opportunity, and opportunity and access are weak across a range of indicators.

7.7 The picture is one therefore of a modest 'Inverness-effect', where there are more employment opportunities and a greater arts, leisure and cultural offer than in the rest of the Inner Moray Firth area. Young people in Inverness and Nairn have the greatest levels of local pride and more here think that the H&I is a better place to live than it was five years ago. However, the effect is perhaps not as pronounced as may have been expected. Even with respect to HE, those in Inverness and Nairn are no more likely than average to see UHI and Inverness Campus as offering a city-university experience and comparable to HE outside the region, although there are very high levels of brand recognition across the Inner Moray Firth.

7.8 This presents a challenge for policy-makers and stakeholders: as Inverness has grown and developed, young people's aspirations have also increased, and a continued effort is required to continue to enhance Inverness and its offer. There is also a need to broaden opportunity, and access to these opportunities, to those across the Inner Moray Firth area. Nonetheless, the growth in opportunity in Inverness in recent years is starting to provide a strong basis for meeting the needs and aspirations of young people going forward.

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, 1,430 young people from Inner Moray Firth responded to the survey (either online or through a paper version). This represents 32% of the total survey sample and a strong confidence level of 95% with a +/-3% margin of error, based on an estimated 15-30 year old Inner Moray Firth population of 27,924.²¹ This provides a robust survey sample and high reliability in the findings.²²

Age

Overall, 702 (49%) of those responding were aged 15-18 years, 406 (28%) were aged 19-24 years and 322 (23%) 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 +/-4% and +/-6%.

Survey responses have a slightly higher level of representation for those aged 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 their future. As a consequence, the survey sample is slightly less representative of those aged 19-30 years.

Table 4.1: Inner Moray Firth Survey Response by Age and Representativeness

Age group	Total (survey)	%	Inner Moray Firth (%)	+/-
15-18	702	49%	26%	+23%
19-24	406	28%	34%	-6%
25-30	322	23%	40%	-17%
Total	1430	100%	100%	N/A

Source: *ekosgen, 2015, Survey of Young People; Census (2011)*

Gender

In all, 62% of respondents from Inner Moray Firth (862) were female, compared to 48% across the H&I. Nearly four in 10 (38%) were male (534) (compared to 52% across the region).²³ Five preferred not to say.

²¹ Census (2011) – area office breakdown provided by Highlands and Islands Enterprise.

²² 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 all status categories; thus, not all of the categories sum to the full 1430 responses received.

²³ *National Register of Scotland Mid-year Population Estimates (2013)*

For both males and females, this again provides a high level of confidence at 95%, with a +/-4 % margin of error for females, and a +/-5% margin of error for males.²⁴

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 Inner Moray Firth, the majority of respondents were from Inverness and Nairn (767 – 56%). A significant number of respondents were from Easter Ross (525 – 38%) and a few (88 – 6%) were from south of Inverness.²⁵

Status

Just over one in four respondents (42% - 597) were school pupils at the time of responding. More than a third (36%) of respondents were in employment or self-employed (508), and 16% (224) were a university/college student.

Small numbers responding to the survey were undertaking an apprenticeship (2% - 34), and those that were unemployed (20), had finished education, but were not currently in employment or unemployed (14) or were carers or home makers (20) represented about 1% each.

In comparison to the wider sample, respondents from Inner Moray Firth are more commonly in employment or self-employment, and are marginally less likely to be school pupils or university/college students.

Summary

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

²⁴ *National Register of Scotland Mid-year Population Estimates (2013)*

²⁵ Please note, this is based on the respondents' postcode. There were 50 individuals that it was not possible to determine the sub-area for.

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