

Moray Housing Market Partnership

2023 HNDA: Key Worker Housing Stakeholder Consultation Outcomes

May 2023



Table of Contents

1	Introduction	3
2	Moray Workforce Housing Requirements: Stakeholder Consultation Outcomes	4
2.1	Specialist Housing Insight and Evidence.....	4
2.2	HNDA Evidence on Key Worker Housing Pressures: Stakeholder Validation	5
3	Stakeholder Engagement Outcomes: Focus Group Discussion	7
3.1.1	Question 1 – Interventions to ease Housing related Recruitment and Retention Problems	7
3.1.2	Question 2 – The role of Key Worker Housing Models.....	8
3.1.3	Question 3 – Extending the Rented Sector in Moray.....	9
3.1.4	Question 4 – The Role of the Affordable Housing Sector in Meeting the need for Key Worker Housing.....	11
4	Meeting the Housing Needs of Key Workers in Moray: Stakeholder Consultation Outcomes – Key Themes	13
5	2023 Moray HNDA Stakeholder Consultation Outcomes: Key Themes	15

Appendix A: Key Worker Housing Workshop Delegate List
Appendix B: Key Worker Housing Workshop Presentation

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1 Introduction

In March and April 2023, the Moray Housing Market Partnership hosted a programme of consultation and engagement events inviting stakeholders to scrutinise, validate and debate the emerging outcomes of the Housing Need and Demand Assessment (HNDA) study for Moray (2023).

The Moray HNDA is now nearing completion and will provide crucial evidence to inform Local Housing Strategy and Local Development Planning processes. The aim of the key worker housing workshop was to provide an opportunity for local employers to discuss the extent and nature of the local recruitment and retention problems, scrutinise emerging evidence and discuss the approach to meeting identified housing requirements.

This includes considering and validating key worker housing estimates by area along with considering a range of policy and delivery interventions that will ease the recruitment and retention pressures that could impact upon economic growth and development in the Moray area. The workshop provided an important opportunity for the HNDA partnership to obtain feedback on the process and draft outputs of the 2023 Moray HNDA and to influence the final draft document to be submitted to the Scottish Government in July 2023.

The workshop took place on Tuesday 23rd May 2023 from 10.00am - 12.00pm and was hosted virtually via Microsoft Teams.

Delegates including local employers from public and private sector organisations, attended and were presented with background information on the Moray HNDA process, with a specific focus on the Moray economy as a driver of future housing requirements. A wide range of stakeholder and partner interests were represented at the event including NHS professionals, Moray Council, the Aviation sector and the Moray Chamber of Commerce. Appendix A provides full details of the stakeholders who attended and participated in the workshop. In total, 21 partners and stakeholders attended the full workshop programme.

This outcomes report detail the views and perspectives of stakeholders on the emerging evidence and outputs of the 2023 HNDA providing important validation evidence on the extent and nature of key worker housing requirements across the Moray area.



2 Moray Workforce Housing Requirements: Stakeholder Consultation Outcomes

The aim of the Key Worker Housing Workshop was to enable stakeholder consultation on the assumptions and evidence underpinning emerging housing estimates and to consult and obtain feedback from local employers on the extent and nature of key worker housing pressures. Stakeholder consultation outcomes will then inform the final HNDA submission to the Scottish Government **to consider whether the HNDA is robust and credible**. The programme for the key worker housing workshop was as follows:

<p>Introduction 10.00 – 10.15 Background to Moray HNDA process HNDA evidence and insights</p>	<p>Key Worker Housing Briefing 10.15 – 10.30 Key worker housing research: Key findings</p>	<p>Stakeholder Reaction Time 10.30 – 11.00 Key worker housing: validating the main issues Insight & evidence – Key worker housing data partnership</p>	<p>Partner Breakout 11.00 – 11.55 Policy interventions to ease recruitment & retention pressures Key worker housing models Key worker housing estimates</p>	<p>Next Steps 11.55 – 12.00 HNDA Timescales Stakeholder comment – 1 key policy ask Close of workshop</p>

Local authorities are encouraged to work with Housing Market Partnerships (HMPs) in approving housing estimates and to adopt a collaborative and constructive approach to assessing the role of key worker and student accommodation in future housing supply and land use planning policies. The objectives for the HNDA Key Worker Housing Workshop were to:

- share the emerging evidence on the extent and nature of existing key worker housing pressures and the extent to which the Moray economy will drive housing growth (and vice versa)
- attain stakeholder views on the extent of key worker housing requirements including:
 - policy interventions to ease recruitment and retention pressures
 - key worker housing models
 - enhancing the accessibility and affordability of housing options for working age households in Moray.

Partners were invited to discuss the evidence and analysis, provide local anecdotal evidence and consider policy implications and interventions for key worker housing. An interactive whiteboard was used during breakout groups to record the views and opinions of stakeholders. Copies of the slide-pack used to present evidence on key worker housing provision are available in Appendix B.

2.1 Key Worker Housing Insight and Evidence

To inform the debate, an opening plenary session presented local evidence and assumptions which underpin the analysis of workforce housing pressures in Moray, as well as unmet need for key worker accommodation. Partners and stakeholders were then invited to consider focus group questions, debating key issues arising from the evidence and economic ambitions associated with the Moray Growth Deal.



The key headlines and main issues associated with key worker housing pressures can be summarised as follows:

<p>Moray Economy</p>	<p>Traditionally the Moray economy has grown at a slower rate than Scotland with productivity 14% lower. Despite average incomes being 1% higher in Moray than Scotland, average weekly pay is 13% lower. This echoes the evidence of significant income inequalities across the Moray</p> <p>The Moray Growth Deal will deliver transformational investment to drive economic growth by investing over £100 million in eight strategic and generating up to 3,500 jobs.</p>	<p>Student accommodation requirements</p>	<p>UHI intends to develop additional accommodation in Moray over the next 10 years to ensure a lack of accommodation does not impact on the ability of the University to offer placements.</p> <p>Forecast student numbers that will be generated from the Growth Deal additional campus are 150 additional rooms by 2030 and a further 150 additional rooms by 2035</p>
<p>Housing options & tenure</p>	<p>The housing system in Moray is dominated by owner occupation with an equal proportion of homes in this tenure (58%) as is the case nationally (59%). In contrast the social housing sector accommodates 18% of local households notably lower than the Scottish average at 23%.</p> <p>There has been a reduction in the number of PRS properties registered since the last HNDA with 5,193 homes registered in 2022. The PRS is a key transitional and flexible tenure for key workers</p>	<p>Key worker housing study</p>	<p>Across 12 respondents, employee growth of 120 FTEs was projected. The survey revealed major (future) recruitment & retention pressures facing public sector organisation including Moray Council & NHS. Whilst the MOD/Aviation sectors are projected to grow, limited recruitment/retention pressures are expected due to accommodation support in place.</p> <p>The housing types most needed are private rented at 30%; mid-market rent and home ownership both at 20%. Elgin is a priority area for key worker housing</p>
<p>MOD growth and impact</p>	<p>MOD are reviewing outdated model with new model expected early 2024. If service personnel prefer to rent or buy locally they will get an allowance which reflects their SLA/SFA entitlements. It is anticipated that 500 additional service personnel is projected to be placed at Lossiemouth by 2025.</p> <p>MOD implementing a range of solutions with an emphasis on maximising the use of existing stock and building new single living accommodation</p>	<p>Key worker housing pressures</p>	<p>Employers recognise that second homes and short term lets are limiting access to affordable housing options. Social housing or dedicated provision not seen as future accommodation models</p> <p>More private rented sector accommodation type needed to help reduce any future difficulties in recruiting staff and support growth in Moray economy</p>

2.2 HNDA Evidence on Key Worker Housing Pressures: Stakeholder Validation

Following conference presentations on economic drivers of housing growth and gaps in the provision of accommodation for working age households, there was an opportunity for discussion on the key findings to allow stakeholders the opportunity to reflect on and react to emerging research outcomes. This was an open discussion which enabled stakeholders to highlight and share further local knowledge to help inform the policy framework for key worker housing prior to the more detailed scrutiny in breakout sessions. The main themes which emerged from the discussion were as follows:

- **Aviation Sector Growth:** presentation numbers may not be fully reflective of the full extent of growth in the Aviation Sector in the next 5 to 10 years. The potential for 300-400 new employees in the next five years was highlighted, plus wider company interest in operating in Moray which could increase numbers further
- **Accommodation Challenges for Health Staff:** Stakeholders from across health services in Moray confirmed that key worker housing challenges were impacting on recruitment and retention and there was an urgent need to provide keyworker housing to relieve workforce pressures

‘The experience locally is that accommodation is an issue for staff wanting to work in the Health Sector and I think it is important that this is available locally and where it is needed’.

‘I work with Physiotherapy, Speech and Language Therapy, OT, Podiatry and Dietetics; within these services we have had a lot of experience of staff accepting jobs and really struggling to get accommodation and then turning jobs down which’.

- **Scale of Health Recruitment Issues:** Stakeholders from Health Services confirmed they recognised the substantial scale of Health recruitment needed in Moray over the next 12 months, identified from the findings of the HNDA Keyworker Survey 2023



- **Wider Impacts of MOD:** It was noted that families of serving personnel who have decided to remain in Moray longer term are often employed locally by the NHS, the Council and other economic sectors. Therefore, along with the provision of homes, there is also a need to provide schools and nurseries to encourage people to stay and build a life in Moray

'I know that many RAF personnel end up staying here long term and settle here, with similar trends for the Army. This is a good thing as we do get quite a lot of health staff whose partners work for the MOD so it's actually a useful way of bringing people to the area. I'm sure that this applies to the Council and other sectors too. But we need to make that choice easier for them and provide homes and schools for families'

- **Single and Temporary Accommodation:** Health Stakeholders identified that more single occupancy and temporary accommodation was required for single people who often cannot afford to buy or rent as individuals, to make it easier to find accommodation once they have relocated to Moray. Social isolation was also highlighted as an issue when new employees did find accommodation they need

'Single person occupancy is really difficult, and we've had a few who have come to the area who have managed to get something, but then it's either far too expensive or they are just really lonely because the type of accommodation they've managed to find isn't on public transport routes. It's sometimes easier to get accommodation once you're here.'

- **Gaps in Public Transport Connectivity:** A number of stakeholders agreed that public transport was also impacting on recruitment and retention due to gaps in connectivity between train and bus networks as well as rural location of many of Moray's settlements. This also has an impact on social isolation in the workforce who relocate to work in Moray, with examples of households leaving due to lack of social networks and difficulties in building social connections
- **Promotion and Marketing of Transformational Growth:** Stakeholders also agreed that there was a need for further promotion and marketing of Moray as an attractive place to live and work in order to entice workers to consider the area
- **Collaboration and Learning:** There was strong consensus and agreement across employers that more partnership working was needed to share understanding of the marketing approaches and accommodation models in Moray which have worked effectively in the private sector and could be extended in the public sector.



3 Stakeholder Engagement Outcomes: Focus Group Discussion

3.1.1 Question 1 – Interventions to ease Housing related Recruitment and Retention Problems

The focus group session offered stakeholders the opportunity to discuss and consider identified gaps in the current supply of key worker housing, as well as housing policy interventions to support the growth and development of the Moray economy. The first questions that stakeholders were asked to consider focused on employer recruitment and retention issues as follows:

Is recruitment and retention as a result of housing sector shortage a public sector problem only?
Could the public sector consider introducing recruitment relocation and incentives schemes similar to private sector employers?

Question 1 stakeholder feedback is detailed below:

Stakeholders suggested that whilst both public and private sector businesses are experiencing recruitment and retention pressures in Moray, public sector organisations in general and the NHS specifically, were experiencing major housing related recruitment problems. A 'perfect storm' was described in the NHS as the impact of Covid-19 on health professionals leaving the Moray sector is evident, aligned to the pressures associated with the backlog of health conditions and an aging population. It was agreed that a 'scramble' in recruiting NHS and allied health professionals was exacerbating wider key worker housing pressures in Moray.

It was also agreed that public sector organisations were less likely to be agile in the Moray housing market and less able to test creative solutions that encourage people to relocate to the Moray area. It was agreed that Community Planning partners need to come together to collaborate on key worker housing solutions to create the scale that would help to balance the housing related risks to the Moray economy.

"I think it is well known that wider health and social care services are under extreme pressures since Covid and there's a real scramble for recruitment. So we're trying to recruit our way out of a crisis at the same time that people are leaving the health sector. And this is in the context of big accommodation shortages locally, so we have a big recruitment and big retention problem..."

"I really understand the pressures associated with trying to attract people to the area. I suppose we're in the privileged position of having the internal resources to allow us to do things offering corporate let flats to enable people to come to move to the area and a marketing team who do a really good job in selling the company and Moray area to people".

It was acknowledged that whilst private sector businesses are investing significant resources in enabling recruitment and retention, they are finding successful ways to relieve recruitment pressures. It was acknowledged that temporary and transitional accommodation has been central in enabling potential candidates to make the decision to come to Moray and then search for settled accommodation. It was agreed that public sector employers need to learn from these successful recruitment and relocation approaches and that a more collaborative approach is needed to jointly market available job opportunities and also Moray as a place to live.

"In the health sector, we get a lot of new employees who are the spouses of partners relocating into the MOD. We need to think how we can promote Moray as a place to those wider family networks and work with the MOD to share opportunities"



“We made a conscious decision to be more agile in the Moray housing market and to set up a range of relocation supports. We have invested heavily in money and time to enable relocation, but it has paid dividends – barriers to recruitment are breaking down. Before we did this, every conversation we had, started and ended with our recruitment problems”

“There is no doubt that public sector organisations need to learn from private employers in developing accommodation models. If we can work together to attract workers to Moray, the ripple effect could be huge on the Moray economy”

“It’s very clear that interim accommodation support to relocate to Moray is very important. We need to consider jointly marketing employment and housing opportunities across the public and private sector, and especially to attract couples and wider family groups. It makes sense for us all to sell the benefits of relocation to Moray and the career progression available within the Moray economy”.

Whilst stakeholders were confident that private sector approaches could be more widely used in the public sector recruitment, questions remain over whether relocation packages are successful in retaining staff longer term. Private sector partners acknowledge that it’s ‘too soon to say’ whether new staff are encouraged to remain in Moray and that longer term evaluation is needed. Public sector partners acknowledged that a general lack of affordable housing options in Moray is impacting on retention, with some employees simply unable to continue to afford living in the area. It was agreed that improving the operation of the housing system by creating a greater diversity in housing options and tackling house price inflation should be a future housing and planning policy priority.

“We need to improve housing options rather than just specific housing interventions targeted to the working age population”.

3.1.2 Question 2 – The role of Key Worker Housing Models

The second set of questions stakeholders were asked to consider focused on whether specific key worker housing provision could offer a credible solution to recruitment and retention problems, including:

For businesses experiencing housing barriers to business growth, is purpose built key worker accommodation a viable solution?

What type of partnership and investment models are needed to support key worker housing delivery?

How could public and private sector employers work together to achieve this e.g. land reuse and release?

Stakeholder feedback on Question 2 is detailed below:

There was positive partner support for a ‘blended approach’ to delivering key worker housing solutions including transitional/temporary tenancies to support relocation, shared accommodation models, specific purpose-built accommodation and flexible key worker Hubs, which could collocate and accommodate employees across a range of employment sectors. In particular, the delivery of shared accommodation could be important for those relocating to Moray both in terms of easing affordability but also in enabling people to make social connections and build a network.

“We would definitely support shared accommodation models where employees across sectors could find housing and build local connections. A partnership model could support delivery in terms of funding, risk and securing a pipeline of demand for shared properties”



“There are obvious benefits to shared accommodation, not only can people avoid isolation if they are new to Moray, but they can meet others who can show them what it’s like to live in Moray. This allows new workers to settle into an area and avoid loneliness and disconnection”

“It can work really well for some employees. We had an intern whose preference was to stay in the UHI student accommodation with other people in their age group. This worked out really well”.

These ideas led to discussion on whether it could be possible to develop innovative accommodation models through business collaborations which are linked to the Moray Growth deal. The suggestion of a shared key worker campus in Moray that employers could jointly fund and tap into was warmly received by many partners. It was also confirmed that the Council are working with Moray Growth Deal partners to develop a number of design schemes on sites which could be used as key worker accommodation, including ideas around cohousing. Building reuse and conversion was also considered as a good mechanism to develop key worker housing provision.

“We’re actively working on two sites and getting into quite detailed design stages in terms of the housing mix; one is at the High Street in Elgin. This could offer a fantastic opportunity for NHS key worker accommodation to be located in the centre of the town if we can make those links and create the right partnerships. The other one is in Dallas Dhu in the South of Forres which is not far from the enterprise park. At that site we’re looking at a kind of cohousing model. So I think there’s two fantastic opportunities if we can work quickly to join all the dots together. It would be great if we could develop a sub-group to take this work forward in partnership”

“The subdivision of any property is something we’d be keen to look at and actually the site in High Street in Elgin we are very much thinking about building reuse for the key worker market”

It was acknowledged that within the NHS, governance arrangements can make innovation and agility around partnership decisions slower and more complicated than in private sector businesses despite the significant accommodation pressures facing the health sector. However it was acknowledged that the health sector needs to build positive relationships to boost key worker housing options e.g. partnership working with UHI to deliver short term accommodation and more engagement with letting agents to identify supply and create appropriate leasing mechanisms.

We (the NHS) need to be more creative in how we’re engaging with landlords. In years past, notice boards on halls of residents or GP practices offered good opportunities to advertise and source lets. Now we’re in a digital age, we need to think about how we advertise demand for accommodation or available lets. We need to work more proactively with registered landlords in Moray... We almost need an electronic notice board where landlords and owners can connect with staff looking for accommodation”

It was also acknowledged that despite employer support for shared key worker housing resources, Moray has a very limited HMO sector and lower levels of households sharing accommodation than other areas in Scotland. Exploring whether the acquisition of property and conversion into HMOs for a key worker market, was identified as a potential delivery mechanism.

“There are a number of hotels on the market across Moray which could offer great conversion potential as key worker HMO accommodation. The key question is who would take the risk in terms of delivery and development?”

3.1.3 Question 3 – Extending the Rented Sector in Moray

The third set of questions that stakeholders were asked to consider was:



How can the growth and development of the private rented and mid-market rent sectors be enabled in Moray?

How do we engage with private landlords to arrest PRS decline?

Would an institutional Build to Rent model aligned to the Moray Growth Deal ever work?

Question 3 stakeholder feedback on supporting the growth and development of the private rented sector in Moray is detailed below:

Partners and stakeholders reflected on the employer feedback from the Key Worker Housing Survey which suggests that an increase in private rented sector accommodation is required to meet the needs of the current and future Moray workforce. It was acknowledged that the private rented sector is an important and flexible tenure which offers good transitional options for households moving in or around Moray for work. However, stakeholders were quick to point out limitations in the Moray PRS which limit the scale and quality of housing options on offer:

“Our PRS stock is often located in rural areas, too far away from the centres of population where people want to live and work. The PRS stock in Moray is often older in age and suffers from issues in relation to condition and energy efficiency”.

It was also acknowledged that the PRS in Moray (like other areas in Scotland) is or is likely to contract given the emergency legislation passed by the Scottish Government during Covid, which places restrictions on rent increases and recovery of possession for landlords. Coupled with recent tenancy changes including the introduction of the Private Residential Tenancy (PRT) as well as new quality and energy efficiency standards, landlords see private renting as a greater risk and are losing confidence in the sector’s business model. There was agreement that whilst the introduction of the PRT did provide clear benefits, including greater security of tenure and protection from homelessness, the PRT limits the flexibility of Short Assured Tenancies in offering a fixed term, flexible lease which is ideal for temporary or transitional tenancies for key workers.

“The PRT could be a barrier to the type of transitional and flexible lettings that appeal to key worker housing market. This is reducing landlord confidence in the lettings model, with the STL market more attractive for property investors”

“Whilst the introduction of the PRT was aimed at reducing homelessness and improving quality, it has had unintended consequences for the key worker housing sector. This is very difficult when we’re actively trying to grow the economy and attract people to the Moray area”.

The debate turned to how employers can encourage landlord retention and even growth in the Moray PRS in an attempt to enhance the diversity of housing options available to key workers. It was agreed that public sector organisations should engage more proactively with registered landlords both in communicating demand and in working towards the development of occupancy agreements which could be used as the basis of transitional key worker housing. Better engagement with letting agents was also identified as important in improving communication around available lettings.

The question around PRS growth through a build to rent/institutional investment model was also raised with limited confidence that (despite potential alignment to Moray Growth Deal projects) investors would be interested in the Moray area. It was also noted that currently investors will not consider Scotland as an investment priority given the emergency legislation put in place by the Scottish Government. As the status of this legislation will be confirmed in the coming months, if conditions on rent controls and recovery of possession are reversed, it was agreed that economic development partners should test investor appetite for Build to Rent models aligned to Moray



Growth Deal projects. As institutional investment models by nature are long term investments based on asset appreciation, the question over who would take the initial financial risks were raised with some suggestion that public sector organisations would need to be willing to ‘stand behind’ proposals.

“There is currently £700M of Build to Rent investment on hold across Scotland as a result of the emergency (Tenant Protection) Bill. We need confirmed legislation to address investor uncertainty in the Build to rent Market – for now it’s off the table. In any case, an institutional investment model is a long term investment, and the key question is ‘who takes the up front risk? Who would be willing to take on the head lease?’”

Some stakeholders suggested that given limited influence and control over a diverse landlord sector, growing the PRS in Moray is unlikely to be a mechanism to relieve key worker housing pressures. Instead it was suggested that the delivery of mid-market rent accommodation could provide a tailored accommodation model which would work well for the key worker housing market, as well as delivering homes which are high quality and energy efficient. This also provides a very positive basis for affordable housing developers to partner with wider public and private sector partners to deliver both transitional and longer term key worker accommodation.

“We should be exploring a mid-market rent model to deliver key worker housing, working in partnership with local employers to collectively agree with leasing and management arrangements. We could consider core and cluster provision, furnished tenancies and look for opportunities for building refurbishment and reuse, particularly in town centres”.

3.1.4 Question 4 – The Role of the Affordable Housing Sector in Meeting the need for Key Worker Housing

The fourth question set stakeholders were asked to consider was:

What is the role of social housing providers in meeting the need for key worker housing in Moray?
Is there any scope for affordable key worker housing as part of the Strategic Housing Investment Plan?
Is there a need to review current key worker and ‘need to reside’ priority in current Allocations Policy?

Question 4 stakeholder feedback group is detailed below:

Partners and stakeholders considered the extent and nature of the role social landlords should play in meeting the needs of key workers in Moray. Some respondents of the Key Worker Housing Survey stated that they didn’t fully understand what the social housing offer for key worker housing could be and therefore didn’t identify this option as viable. It was noted that social landlords could be providers, managing agents and developers of key worker housing. However, given the extent and nature of housing need that social landlords have a statutory duty to meet, it was acknowledged that the allocation of affordable homes as settled tenancies to key workers would always be relatively limited. The provision of transitional or temporary accommodation to key workers relocating to Moray was a more feasible option and one that was supported by stakeholders.

“We have a statutory duty to accommodate homeless households in Moray and those with acute housing need, with these groups always absorbing the majority of our available tenancies. However, social landlords could offer non-permanent accommodation to support people moving into the Moray economy for specific periods of time. We need to work with local employers to



scope out the type of support that is needed and manage expectations of what we can deliver, but there is definitely a positive role that social landlords could play.

It was also acknowledged given the competing pressures across public and private employers, creating a definition of key workers that social landlords could use to target and prioritise partnerships will be important. It was suggested that as public sector employers cannot achieve the same agility in the Moray housing market, that support from social landlords should be targeted to public sector employers.

“We need to work together to develop a definition for ‘key worker’ in Moray. My starter for 10 would be health professionals moving into the Moray area to take up key positions”

It was acknowledged that there are already positive relationships in place between the NHS and RSLs, with Grampian Housing Association developing key worker accommodation resources for health staff. It's important that these relationships are further developed and that both public and private sector employers collaborate more to avoid needless competition in the Moray market place.

“We definitely need to collaborate more both in sharing information on needs but also good practice in what works locally. We also need to get a better handle on what key workers are looking for in terms of accommodation so that we can work together to fill the gaps but also signpost people to the right places so that they can meet their own housing need. We need a housing options approach to giving advice to key workers across the public and private sectors”.



4 Meeting the Housing Needs of Key Workers in Moray: Stakeholder Consultation Outcomes – Key Themes

Analysis of stakeholder consultation feedback enables a number of key themes to emerge, which should influence and guide the Moray HMP to finalise HNDA evidence on key worker housing and student accommodation as follows:

- **Public Sector Key Worker Issues:** Public sector employers and particularly the NHS, are experiencing major housing related recruitment problems. A 'scramble' in recruiting NHS and allied health professionals was exacerbating wider key worker housing pressures in Moray with public sector organisations less likely to be agile in the Moray housing market and less able to test creative solutions
- **Collaborative Learning and Marketing:** Temporary and transitional accommodation used by the private sector has been central in enabling potential candidates to move to Moray and then search for settled accommodation. It was agreed that public sector employers need to learn from these successful recruitment and relocation approaches and that a more collaborative approach is required to jointly market Moray as a place to live and work
- **Partnership Working:** More positive relationships to boost key worker housing options are needed e.g. Health partnership working with UHI to deliver short term accommodation, and more engagement with letting agents to identify supply and create appropriate leasing mechanisms.
- **Housing Options Diversity:** Improving the operation of the housing system by creating a greater diversity in housing options is essential in tackling key worker housing pressures. Tackling house price inflation also requires to be a housing and planning policy priority
- **Innovative Key Worker Accommodation Models:** Local employers are supportive of a 'blended approach' to delivering key worker housing solutions. Options include transitional/temporary tenancies to support relocation, shared accommodation models, specific purpose-built accommodation and flexible key worker Hubs which could collocate and accommodate employees across a range of employment sectors. Innovative accommodation models could be developed through business collaborations which are linked to the Moray Growth Deal
- **Shared Key Worker Housing and HMOs:** Despite employer support for shared key worker housing resources, Moray has a very limited HMO sector. Exploring whether the acquisition of property and conversion into HMOs for a key worker market, was identified by local employers as a potential delivery mechanism of interest
- **Private Rented Sector Growth:** Public sector organisations need to engage more proactively with registered landlords both in communicating demand and in working towards the development of occupancy agreements which could be used as the basis of transitional key worker housing. Better engagement with letting agents across public and private sector employers is also required to improve communication around available lettings
- **Build to Rent and Mid-Market Solutions:** There is limited current confidence in PRS growth through a build to rent/institutional investment model in Moray. The delivery of mid-market rent accommodation could provide a more tailored accommodation model which would work well for the key worker housing market, as well as delivering homes which are high quality and energy efficient



- Role of Social Rented Sector: The provision of transitional or temporary accommodation to key workers relocating to Moray was identified as more feasible option for the social rented sector than enhanced allocation of social tenancies, given the pressures on social landlords to meet urgent housing need
- Keyworker Definition: Given the competing pressures across public and private employers, creating a definition of key workers that social landlords could use to target and prioritise the allocation of social housing is required.



5 2023 Moray HNDA Stakeholder Consultation Outcomes: Key Themes

Local authorities are encouraged to work with stakeholders in Housing Market Partnerships (HMPs) to approve housing estimates and to adopt a collaborative and constructive approach to finalising HNDA outcomes. It is important for the credibility of an HNDA that can withstand the scrutiny of stakeholders as a basis for future policy decisions on housing supply and land use planning.

The HNDA key worker housing workshop was therefore instrumental in engaging Housing Market Partners across Moray in scrutinising, debating and validating:

- the extent and nature of housing policy interventions and incentives to support the recruitment and retention of essential workers in the Moray economy
- the potential role of specific key worker housing provision in meeting housing need in Moray
- the extent to which a more diverse and accessible range of housing options need to be developed to meet the needs of key workers with the Moray housing system
- the role of social housing developers in meeting the need for key worker housing.

Stakeholder engagement outcomes will now be utilised by the Moray HNDA partnership to refine, further develop and finalise the HNDA evidence base prior to sign off by service leaders in housing and planning. Informed by this feedback, it is intended that the 2023 Moray HNDA study is submitted to the Scottish Government by the end of June 2023 **for consideration of whether the HNDA is robust and credible.**



Appendix A: Stakeholder Attendance List

Name	Organisation
Audrey Steele-Chalmers	NHS Grampian
Chris Muir	Moray Council
Colin Souter	Robertson Homes
Dan Harris	Cairngorms National Park
Danska Murray	Moray Council
Fiona Geddes	Moray Council
Gary Templeton	Moray Council
Hilda Puskas	Moray Council
Katie Crerar	Cairngorms National Park
Lauren Cowling	NHS Grampian
Malcolm Simmons	NHS Grampian
Marie Simpson	dhi-scotland
Mike Rollo	Moray Council
Rhea Cruickshank	Moray Council
Robert Lockhart	NHS Grampian
Rosemary Reeve	NHS Grampian
Samantha Fraser	Orbex Ltd
Sarah Medcraf	Moray Chamber of Commerce
Sean Marshall	Hanover Scotland
Stephen Loomes	Robertson Homes
Stuart Morrison	Springfield Homes