MY LIFE IN THE HIGHLANDS AND ISLANDS RESEARCH

October 2022

Ipsos

HIE
Highlands and Islands Enterprise
Iomairt na Gàidhealtachd 's nan Eilean

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EXECUTIVE SUMMARY (1)

About this report

This report presents the findings of a large-scale survey conducted by Ipsos on behalf of Highlands and Islands Enterprise (HIE), among 5,301 adults aged 16+ from 4,442 households living in the Highlands and Islands of Scotland. The survey was conducted from 28th January to 25th March 2022 using a 'push-to-web' methodology (see slide 61). Residents could take part either online or by post. Results to some questions are based on individuals and others on households, where this is required to avoid double counting.

Following the survey, 34 participants also took part in qualitative group discussions covering some of the survey topics in more depth.

Connectivity and access to services

Our findings illustrate some of the everyday challenges of accessing facilities and services for residents in the region. 44% say it would be difficult to have a takeaway delivered and 28% that it would be difficult to take out money from a cash machine.

While almost all households have a primary school, a daytime bus and a convenience store within either their local area or a 20-minute drive, a quarter do not have a cottage or community hospital or an evening bus service available within this distance. 18% do not have a supermarket available within this distance, 17% do not have a day care facility for vulnerable or elderly people available, and 16% do not have a bank or mobile bank available.

Digital connectivity also remains a challenge: 21% of residents say it would be difficult to stream a TV programme or film online without pauses or buffering, and this rises to 32% among those in Caithness and Sutherland and 29% in Shetland.

The vast majority of Highlands and Islands residents (87%) rely on a car or van to get around to at least some extent, and this rises to 92% of residents in accessible or remote rural locations.

Access to health services

The majority of households say they have a GP (90%), a dentist (76%) or a midwife or health visitor (61%) within a 20-minute drive. Relatively small proportions (3%) can only access a GP and midwife or health visitor online.

However, around **one in ten are unable to access a dentist (14%) or mental health services (11%) either within a 20-minute drive or online.** 59% can access a physiotherapist within a 20-minute drive, while 6% can only do so online.

Rural access to services

Those living in remote rural areas are less likely to be able to access certain facilities and services within a 20-minute drive, including health and care services. For example, 37% of households in remote rural areas do not have a supermarket available within this distance (18% overall), and 29% do not have a bank or mobile bank available (16% overall). Amongst those have awareness of service availability, 54% of households in remote rural areas can't access mental health services, 35% a dentist and 34% a physiotherapist within a 20-minute drive.

Those in island areas are more reliant on ferry services (68% rely on these) and air services (36%). Increased numbers of tourists are felt to have made it more difficult for local people to access ferry or air services.

EXECUTIVE SUMMARY (2)

Impact of the pandemic and cost of living crisis

The pandemic has impacted on people's access to goods and services: 89% say goods and services are more expensive in their local area now than they were before the pandemic, while 61% say it is more difficult to get hold of the goods they need.

Two thirds of households feel people in their local area have been supporting local businesses more than they used to before the pandemic. However, the pandemic's negative impacts are also apparent: over half (56%) report that businesses in their local area that closed because of lockdown haven't reopened.

Discussion group participants said that a range of goods and services had become more expensive recently, and that **scope to save money was limited**. Those living in more **rural locations and on islands explained how price increases came on top of an existing "premium" for goods and services** in these areas.

Due to increased costs, participants said that they, or others they know, **felt stressed or worried** and had **started to use up savings** to pay for household bills.

Housing

Nine in ten households say their housing situation meets their needs well. However, **half (50%) say it is expensive to heat their home and 17% that their home is difficult to heat,** with these issues more acute in remote rural and island locations.

Housing for local families is the top priority people in the Highlands and Islands identify as being needed for their community to thrive in future, followed by more job opportunities and local businesses and trades.

Many perceive housing challenges in their communities. Young people, households with children and those living in island and remote rural locations are more likely than average to say that a range of housing challenges describe what is happening in their local area. These include there not being enough houses that can be rented at a reasonable price, a shortage of housing for local people, the right types of housing not being available for local people to rent or buy, and local people not being able to afford to buy housing in their area.

EXECUTIVE SUMMARY (3)

Employment and fair work

13% of residents in work have more than one job, with around half (51%) saying this is because they need to and 46% that it is because they prefer to. **19% of those in work are self-employed.**

Two thirds of those in work are happy in their current job. However, **just under half (49%) say they are paid the Real Living Wage and 46% feel they are paid a fair wage.**

While participants in the discussion groups generally felt that there were employment opportunities in their local area, these **jobs tended to be low-skilled and low-paid, and often seasonal**.

Entrepreneurial people and culture

One in eight residents (12%) say they want to start a business and become self-employed.

46% of residents report that new businesses are starting up in their local area. Those in Orkney are more likely to say this, while those in Argyll and the Islands and in Caithness and Sutherland are less likely to say this is the case.

In the discussion groups, potential entrepreneurs said that the availability of **support and advice specifically relevant to their business needs** was important to help them start their own business. Barriers to starting or expanding a business were thought to be: **rising costs, not being able to access or afford the tradespeople required, and not having the time**.

Skilled workforce

More than half of residents report they have undertaken courses or training in the past five years for work or their own interest. However, residents are split on whether local training opportunities mean more young people can stay in the area.

Discussion group participants felt that **local training opportunities could be improved if there were more courses available locally and greater collaboration between training providers and local businesses.**

A third of residents feel it would be difficult to access courses or training in person, while 9% feel it would be difficult to do so online. The top three reasons for finding it difficult to access courses or training are: having to spend time away from home, broadband connection not being reliable enough, and broadband speed being not fast enough. Cost also emerged as a barrier in the survey and in discussion groups.

EXECUTIVE SUMMARY (4)

Energy efficient homes

Relatively few households in the Highlands and Islands report they are currently using green technology to heat their home. Air source heat pumps (7%) and solar panels (5%) are the most used green technologies for home heating in the region, with air source heat pump usage highest in Orkney (36%).

A third of households are planning to make home energy efficiency improvements in the next two to three years. The most common improvements planned are installing a smart meter (16%), having a new boiler or heating system installed (11%) and draught proofing (9%).

Just 6% of households are planning to switch fuel type in the next two to three years. More than half of households that are not planning to make this change say that cost is a main reason. Other common reasons are not wanting to and not enough financial support being available from government to do so.

Information provision and public engagement have a role to play in encouraging residents to switch fuel type: 13% of households not planning to change the fuel type they use say that they do not know how to go about it or need more information.

Among discussion group participants, **cost was cited as a central barrier to making homes more energy efficient** and it was felt that more information was needed on the impact and benefits of net zero changes.

Electric vehicles (EVs) and hybrids

7% of households have bought or leased an electric or hybrid car, while 6% are planning to do so in the next two to three years, and a further 24% are considering it but have not yet made a decision. A quarter have thought about an electric/hybrid car and decided against it.

Cost, range and lack of public charging points are key concerns that require addressing when it comes to electric or hybrid cars. More than 80% of residents find it convincing that 'electric/hybrid cars are too expensive' and 'the distance electric cars are able to travel on a single charge is not far enough', and around three-quarters that 'there aren't enough public charging points'.

57% of residents say it would currently be difficult to charge an EV on-street or at a car park in their local area.

Green jobs

One in five residents (22%) say they would like a 'green' job that helps the environment or helps to prevent climate change.

Two in five of those in work expect that their job will not be affected by the need to reduce carbon emissions, while almost one in five say it would be difficult for their job to adapt to these changes. Among those who do think their job would need to adapt, the most commonly expected impacts for them personally are to be able to work with new technology and the need to invest in new tools or equipment.

While discussion group participants noted there were some opportunities for green jobs in their local area they said that, if they were to change jobs themselves, the **financial benefits of doing so would generally be more important than any environmental motivations**.

EXECUTIVE SUMMARY (5)

Community pride and involvement

Pride in living in their local area is high among residents across all areas of the region: 88% say they take a great deal or fair amount of pride in living here. Pride is especially high among those living in Orkney, Innse Gall, Lochaber, Skye and Wester Ross, and Argyll and the Islands.

Over half of residents take part in activities in their local community. Most commonly these are attending local community events, local groups or sports clubs or volunteering for a charity, social enterprise or community group.

There is scope to improve feelings of involvement in local decision making. Views on whether local people can influence local decision making are mixed: around a third agree local people are able to influence local decision making, while a third disagree, and a further third neither agree nor disagree.

Population change and migration

The region faces particular demographic challenges in rural and remote areas, with older populations that are set to continue ageing, and many areas facing population decline.

Half of residents do not intend to move away from their local area. However, **half of those aged 16-29 say they plan to move away from their local area in the next five years compared to 14% overall.**

Key factors that attracted those who had not always lived in the region were a better quality of life, to take up a job or to be closer to family. Those who had moved to islands and remote rural locations were more likely to say they had moved to the Highlands and Islands for a better quality of life.

Looking at residents' perceptions of recent migration patterns, **around half of households say that most of the people who move to their local area are retired and that people are leaving because they can't find work. However, 29% say people are moving to their local area for new job opportunities**, while 45% think people have been moving to their local area because they can work from home.

Future aspirations

More than half of Highlands and Islands residents (52%) feel optimistic about their community, while just 16% are pessimistic.

Urban and rural residents differ in their views on future priorities for their communities to thrive. Job opportunities, jobs that pay better and social activities are higher priority in towns. In contrast, housing, broadband, more working age people moving to the area and transport connections are more important in rural areas.

1. LIFE IN THE HIGHLANDS AND ISLANDS

SUMMARY

- **The survey findings highlight some of the everyday challenges of accessing facilities and services for people living in the Highlands and Islands.** 57% of residents in the region say it would currently be difficult to charge an electric vehicle on-street or at a car park in their local area, while 44% say it would be difficult to have a takeaway delivered and 28% that it would be difficult to take out money from a cash machine. Regarding online connectivity, 21% say it would be difficult to stream a TV programme or feature film online without pauses or buffering, with those in Caithness and Sutherland and Shetland more likely to say this.

- **Most households have a primary school (77%), a daytime bus (77%) and a convenience store (74%) available within a 15-20 minute walk of their home, while almost all have these available within a 20-minute drive. However, proximity of access is more mixed for other key services.** A quarter (25%) do not have a cottage or community hospital or an evening bus service available within a 20-minute drive of their home, 18% do not have a supermarket available, 17% do not have a day care facility for vulnerable or elderly people available, and 16% do not have a bank or mobile bank available. **Those living in remote rural areas are less likely than average to have most of these services available within their local area.**

- **The majority of Highlands and Islands households say they are able to access a GP (90%), a dentist (76%) or a midwife or health visitor (61%) within a 20-minute drive**. However, **around one in ten say they are unable to access a dentist (14%) or mental health services (11%) either within this distance or online.** Excluding those who don't know about service availability, 19% cannot access a dentist and 34% mental health services in person within a 20-minute drive. **Access to health and care services is more limited for households in remote rural areas.**

- **Around 4 in 5 households report they have access to wellbeing facilities,** such as sports facilities and clubs (86%), a gym or leisure centre (81%) or a library (80%), within a 20-minute drive of their local area.

- **Given the rural geography of much of the region, car/van travel is the form of transport most residents rely on (87% to some extent)**, followed by ferry (23%, rising to 68% for those in island areas), bus (20%), air services (18%, rising to 36% on islands) and trains (12%). Half of residents who rely on train services (52%) are dissatisfied with the cost, as are 41% of those reliant on air services and 36% of those reliant on ferry services.

- **Half of households in the region (50%) say their home is expensive to heat and 17% say it is difficult to heat.** These issues are more acute in remote rural locations and islands, and among private renters.

- **Around half (49%) of residents work in the private sector and two-fifths (42%) in the public sector. One in five (19%) of those in work are self-employed and one in eight (13%) have more than one job.** Around half work more than one job because they need to.

ACCESS TO FACILITIES AND SERVICES (1)

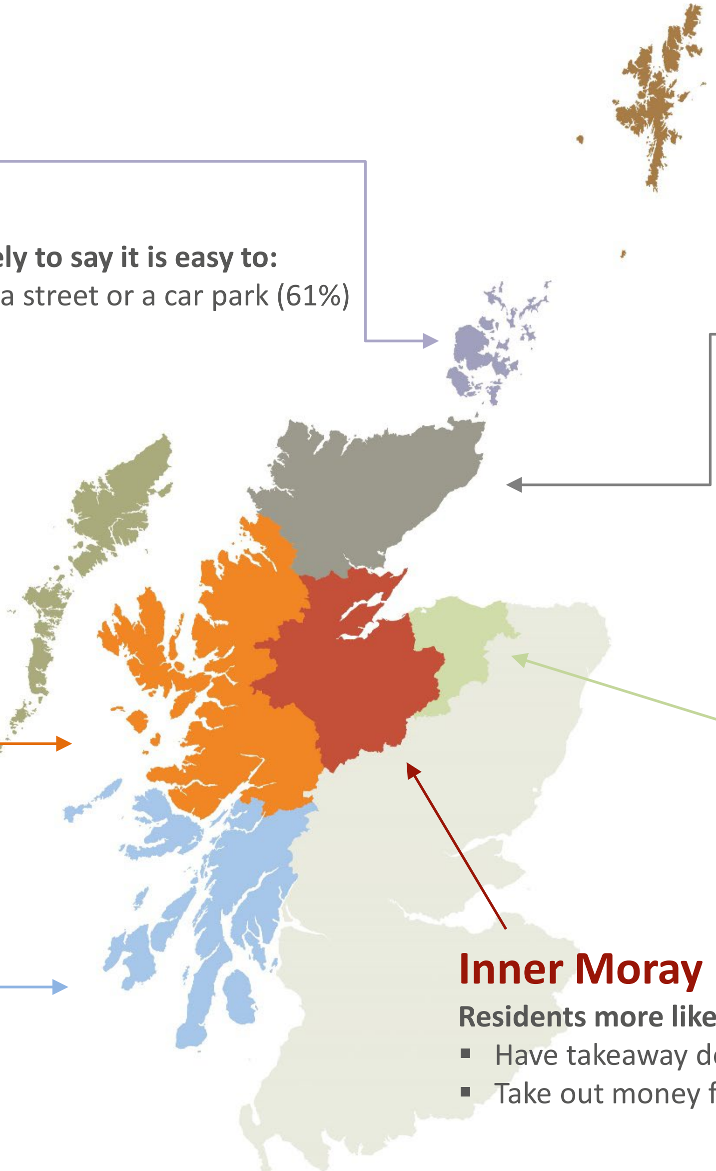
Our findings illustrate some of the challenges of accessing facilities and services in the region. According to residents:

57% say it would be difficult to charge an EV on-street or at a local car park

44% say it would be difficult to have a takeaway delivered

28% say it would be difficult to take out money from a cash machine

21% say it would be difficult to stream a TV programme or film online without pauses or buffering



Shetland

Residents more likely to say it is difficult to:

- Charge an EV on a street or a car park (70%)
- Have a takeaway delivered (77%)
- Take out money from a cash machine (55%)
- Stream a TV programme or film online without pauses or buffering (29%)

Orkney

Residents more likely to say it is easy to:

- Charge an EV on a street or a car park (61%)

Caithness and Sutherland

Residents more likely to say it is difficult to:

- Have a takeaway delivered (55%)
- Take out money from a cash machine (38%)
- Stream a TV programme or film online without pauses or buffering (32%)

Residents more likely to say it is easy to:

- Charge an EV on a street or a car park (33%)

Innse Gall

Residents more likely to say it is difficult to:

- Have a takeaway delivered (81%)

Lochaber, Skye and Wester Ross

Residents more likely to say it is difficult to:

- Have a takeaway delivered (72%)
- Take out money from a cash machine (34%)

Moray

Residents more likely to say it is easy to:

- Have takeaway delivered (64%)
- Take out money from a cash machine (75%)

Argyll and the Islands

Residents more likely to say it is difficult to:

- Have a takeaway delivered (52%)

Inner Moray Firth

Residents more likely to say it is easy to:

- Have takeaway delivered (67%)
- Take out money from a cash machine (76%)

Base: All households (4,442); fieldwork = 28 January – 25 March 2022

ACCESS TO FACILITIES AND SERVICES (2)

Most households have a primary school (77%), a daytime bus (77%) and a convenience store (74%) available within a 15-20 minute walk of their home, while almost all have these available within a 20-minute drive. However, proximity of access is more mixed for other key services. A quarter do not have a cottage or community hospital or an evening bus service available within a 20-minute drive of their home, while 18% do not have a supermarket available within this distance.

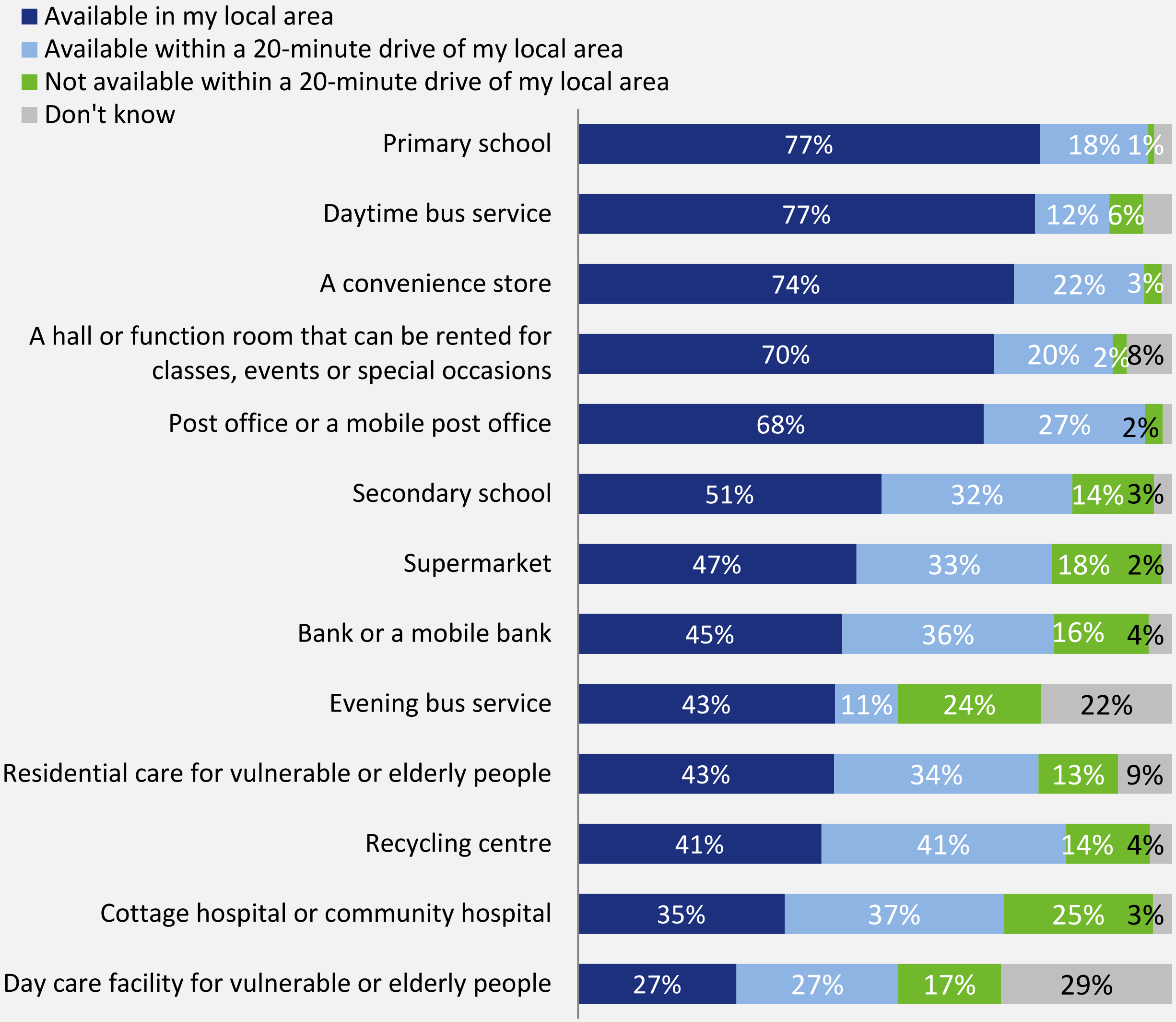
Those living in **remote rural areas** are less likely than average to have services available within their local area, with the exception of halls or function rooms that can be rented. For example, 41% don't have access to a post office or mobile post office within a 15-20 min walk, while 52% don't have access to an evening bus service. Within a 20-minute drive, 37% can't access a supermarket and 29% a bank or mobile bank.

Those in **Lochaber, Skye and Wester Ross** are also less likely to have access to most of these facilities or services, either within their local area or within a 20-minute drive.

A significant minority don't know whether a day care facility for vulnerable or elderly people (29%) or an evening bus service (22%) is available or not within their local area/ within a 20-minute drive.

Three in five households (62%) in the region say that voluntary organisations and volunteers are having to provide services in their local area that should be done by local authorities. This is higher in Caithness and Sutherland (72%) and lower in Shetland (52%).

Q. For each of the following facilities or services, please indicate whether each is currently available within your local area or within a 20-minute drive of your local area. By local area we mean the area within a 15-20 minute walk from your home.



Base: All households (4,442); fieldwork = 28 January – 25 March 2022

ACCESS TO FACILITIES AND SERVICES (3)

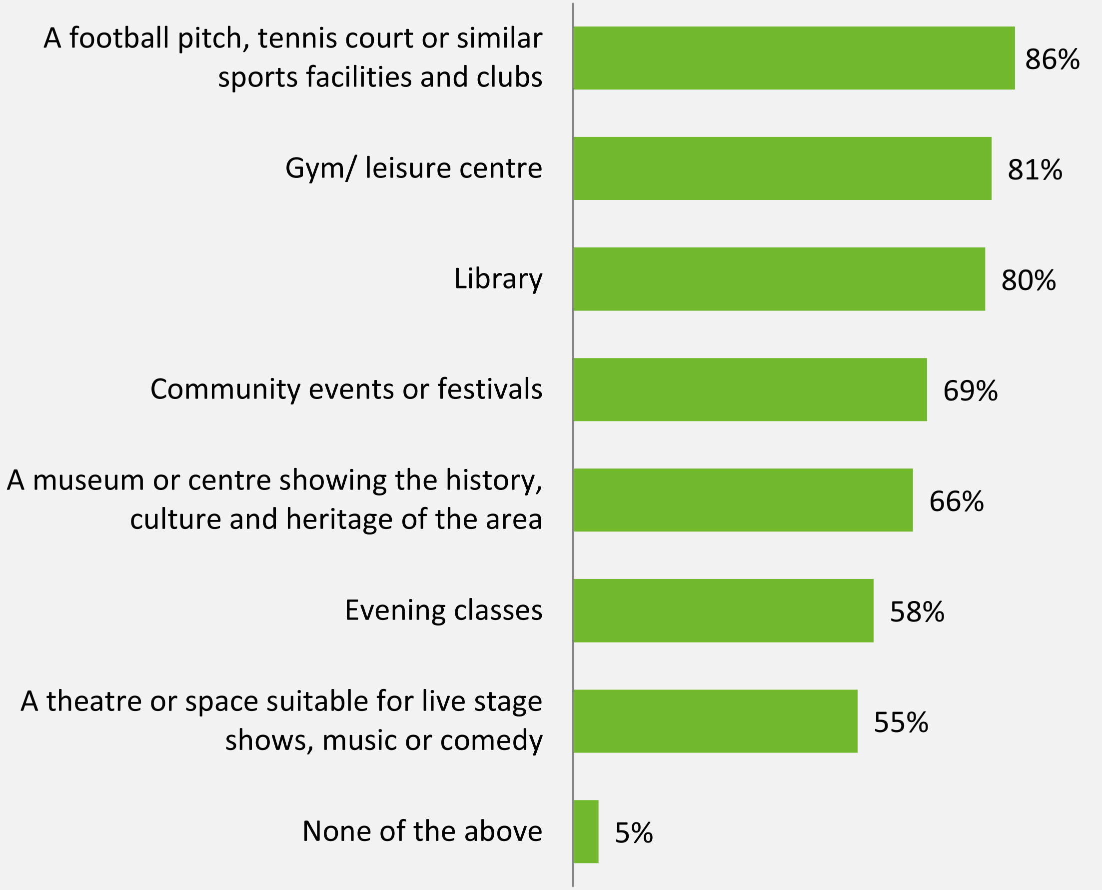
Most households in the region say they could access sports facilities, a gym or leisure centre or a library within a 20-minute drive of their local area. Fewer could access a theatre or space suitable for live stage shows, music or comedy, or evening classes, within this distance (55% and 58% respectively). Access to these facilities or services is lower in remote rural areas.

Those living in remote rural areas are less likely to be able to access these facilities or services, with the exception of community events or festivals.

Residents of Lochaber, Skye and Wester Ross are less likely to be able to access any of these facilities or services. Similarly, those living in Argyll and the Islands are less likely to be able to access most of them, with the exception of community events or festivals or a museum/centre showing the area's history, culture and heritage.

Orkney and Shetland residents are more likely than average to say they could access community events or festivals within a 20-minute drive of their local area. In contrast, those in Caithness and Sutherland and Lochaber, Skye and Wester Ross are less likely to say this.

Q. Whether you use them or not, which of these facilities or services could you access within a 20-minute drive of your local area if you wanted to?



Base: All households (4,442); fieldwork = 28 January – 25 March 2022

ACCESS TO HEALTH SERVICES (1)

The majority of Highlands and Islands households say they are able to access a GP (90%) or a dentist (76%) or midwife or health visitor (61%) within a 20-minute drive. However, more than 1 in 10 say they are unable to access dental or mental health services either online or within a 20-minute drive (14% and 11% respectively).

Awareness of which health services are available locally is lower for certain services, which may reflect levels of usage. A substantial proportion of households (46%) don't know whether mental health services can be accessed either in person locally to them or online, and levels of awareness are also lower for home care services for the vulnerable or elderly, midwifery or health visiting services and physiotherapists.

Once 'don't know' answers are excluded:

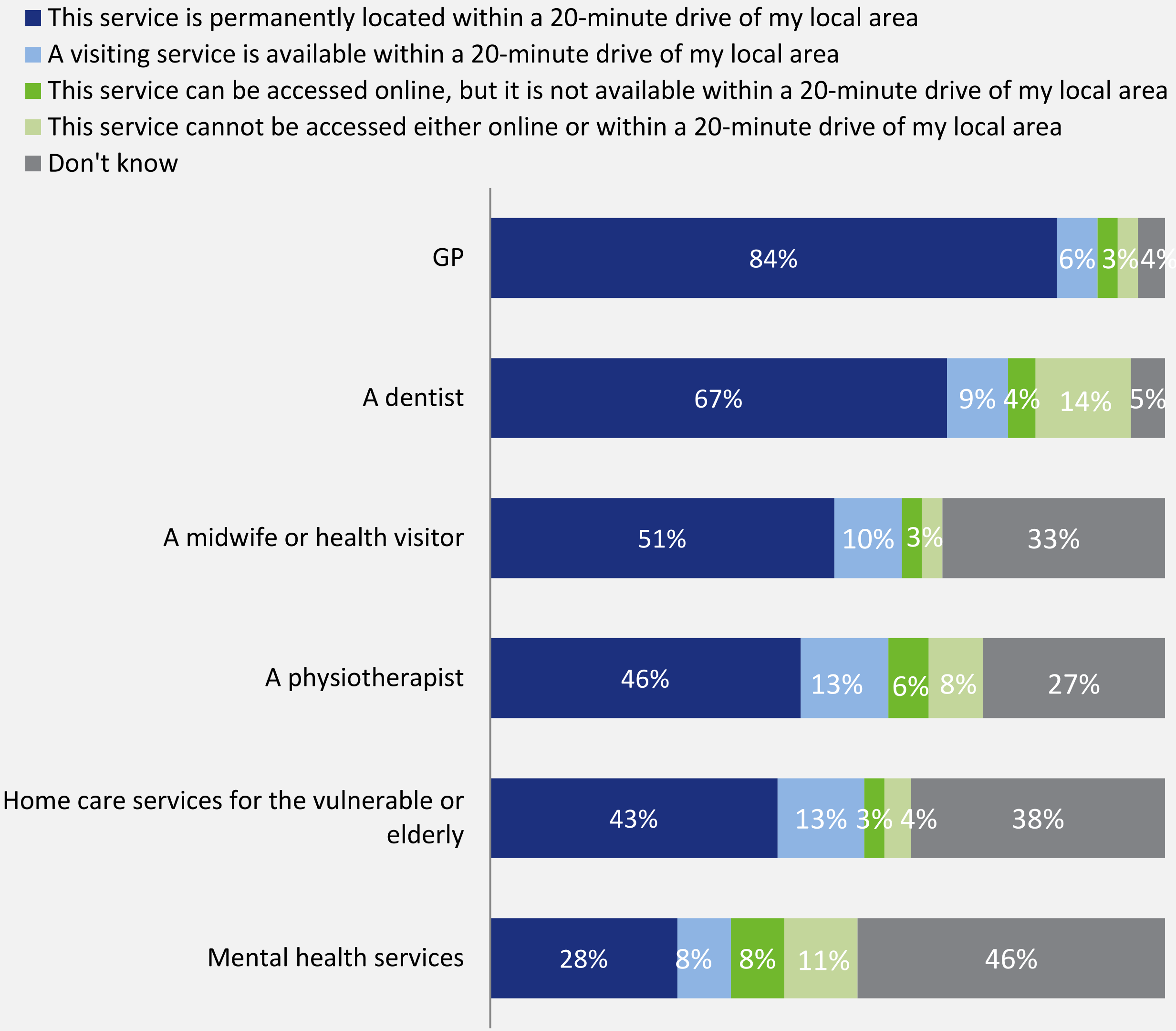
34% **OF HOUSEHOLDS SAY THEY CANNOT ACCESS MENTAL HEALTH SERVICES IN PERSON WITHIN A 20-MINUTE DRIVE**

20% **CANNOT ACCESS A PHYSIOTHERAPIST IN PERSON WITHIN THIS DISTANCE**

19% **CANNOT ACCESS A DENTIST IN PERSON WITHIN THIS DISTANCE.**

10% **CANNOT ACCESS HOME CARE SERVICES IN PERSON WITHIN THIS DISTANCE.**

Q. For each of the following health and care services, please indicate which best describes their availability within your local area?



Base: All households (4,442); fieldwork = 28 January – 25 March 2022

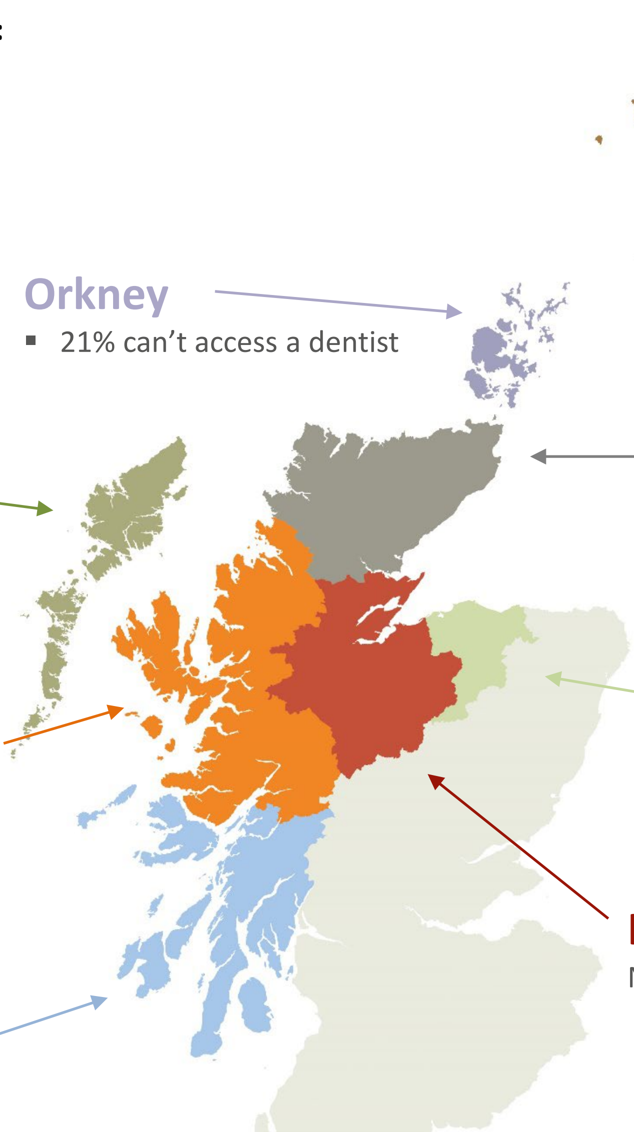
ACCESS TO HEALTH SERVICES (2)

Households in remote rural areas are less likely than the regional average to be able to access health and care services in person, within a 20-minute drive of their local area. 61% can access a dentist and 47% can access a physiotherapist in person (compared to 76%, and 59% in the region overall), and only 25% can access mental health services in person (compared to 36%). Overall, households in Lochaber, Skye and Wester Ross and Argyll and the Islands are more likely to face challenges in accessing services.

In person access to health and care services is more limited for households in remote rural areas (excluding don't know responses):

- 8% say they can't access a GP in person within a 20-minute drive
- 16% can't access a midwife/health visitor
- 16% can't access home care services for the vulnerable or elderly
- 34% can't access a physiotherapist
- 35% can't access a dentist
- 54% can't access mental health services.

The map highlights areas of the region where access to certain health and care services either **within a 20-minute drive or online** is **lower than average**. Don't know responses have been excluded.



Shetland
- 33% can't access mental health services
- 28% can't access a physiotherapist
- 25% can't access a dentist

Orkney
- 21% can't access a dentist

Caithness and Sutherland
- 34% can't access mental health services
- 10% can't access home care for vulnerable or elderly people

Innse Gall
- 24% can't access a dentist

Moray
No significant differences to average

Lochaber, Skye and Wester Ross
- 33% can't access mental health services
- 29% can't access a dentist
- 20% can't access a physiotherapist
- 11% can't access home care services for vulnerable or elderly people

Inner Moray Firth
No significant differences to average

Argyll and the Islands
- 21% can't access a dentist
- 16% can't access a physiotherapist
- 8% can't access a midwife or health visitor
- 5% can't access a GP

Base: All households who know whether each health or care service is available locally (2,476 for mental health services; 2,815 for home care services for vulnerable or elderly people; 3,043 for midwife or health visitor; 3,320 for physiotherapist; 4,305 for dentist; 4,372 for GP service): fieldwork = 28 January – 25 March 2022

TRANSPORT

The vast majority of Highlands and Islands residents (87%) rely on cars or vans to get around to at least some extent, including 79% who are reliant on a car or van to a large extent. Fewer rely on ferries (23%), buses (20%), air services (18%) or trains (12%) at least to some extent. Most households own at least one car (87%), including 44% who own two or more.

As would be expected, location makes a difference to transport modes, with those in rural locations more likely to rely on a car or van.

94% OF RESIDENTS IN LOCHABER, SKYE AND WESTER ROSS RELY ON A CAR OR VAN TO SOME EXTENT, AS DO…

92% …OF RESIDENTS IN ACCESSIBLE OR REMOTE RURAL LOCATIONS

Those living in the Inner Moray Firth are more likely than average to say they rely on bus or train services (23% and 15% respectively), perhaps reflecting service availability.

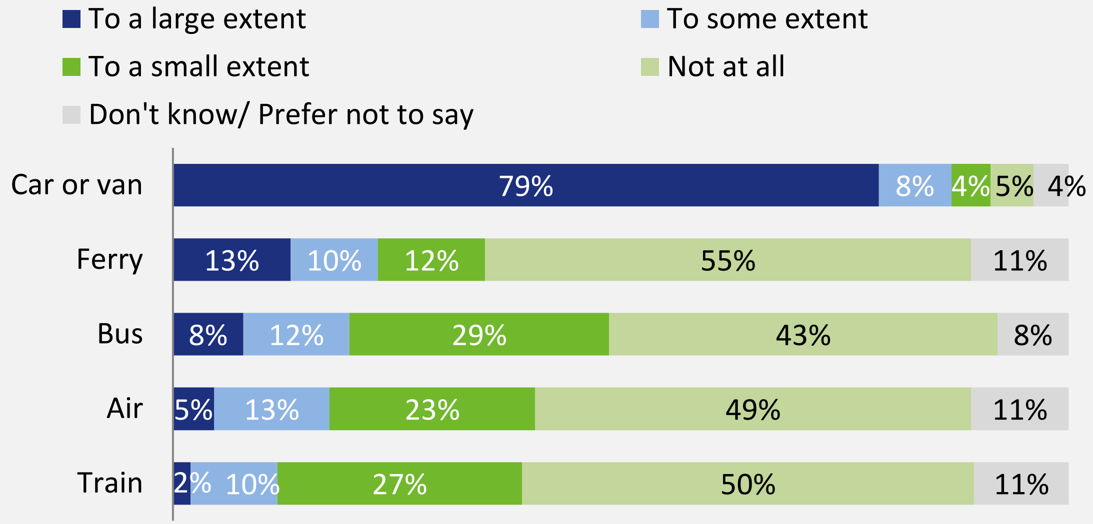
Those in island locations are more reliant on ferry services (68% rely on these to at least some extent, including 45% who rely on them to a large extent) and air services (36% and 11%, respectively).

Car ownership

Households in accessible and remote rural locations are more likely to own two or more cars (56% and 51% respectively compared to 44% overall) as are those with children at home (60%).

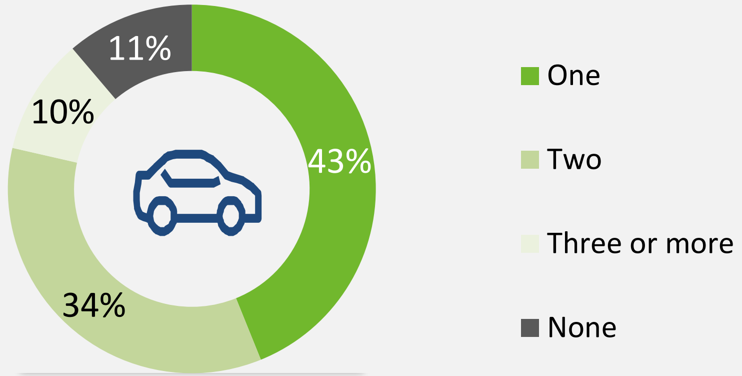
Those in urban/town locations are more likely to own no car (17%) or just one (47%).

Q. To what extent would you say you rely on the following forms of transport?



Base: All participants (5,301); fieldwork = 28 January – 25 March 2022

Q. In total, how many cars or vans are owned, or available for use, by members of your household?



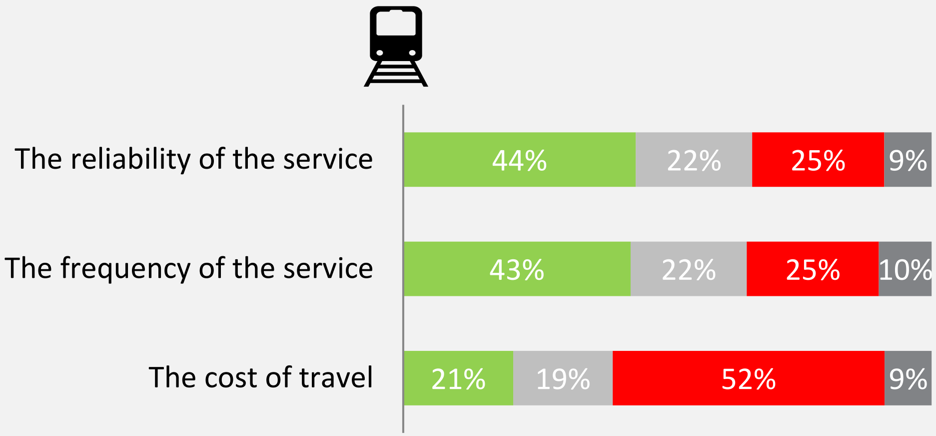
Base: All households (4,442); fieldwork = 28 January – 25 March 2022

SATISFACTION WITH TRANSPORT SERVICES

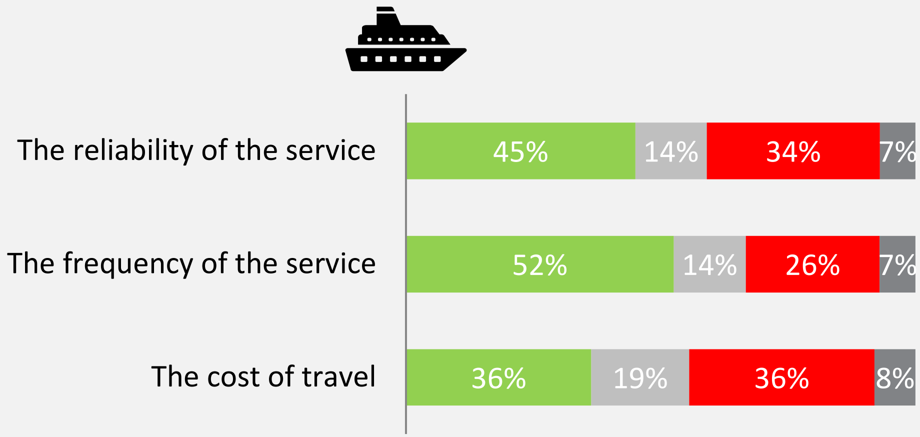
Half of residents who rely on train services (52%) are dissatisfied with the cost, as are 41% of those reliant on air services and 36% of those reliant on ferry services. Three in ten of those who rely on bus services (31%) are dissatisfied with the frequency of the service. For all these transport services, though, more are satisfied with the reliability and frequency of each service than are dissatisfied. Dissatisfaction with the reliability of ferry services is especially high in Argyll and the Islands (64%) and Innse Gall (50%).

Q. Thinking about the services you rely on, how satisfied or dissatisfied are you with ...?

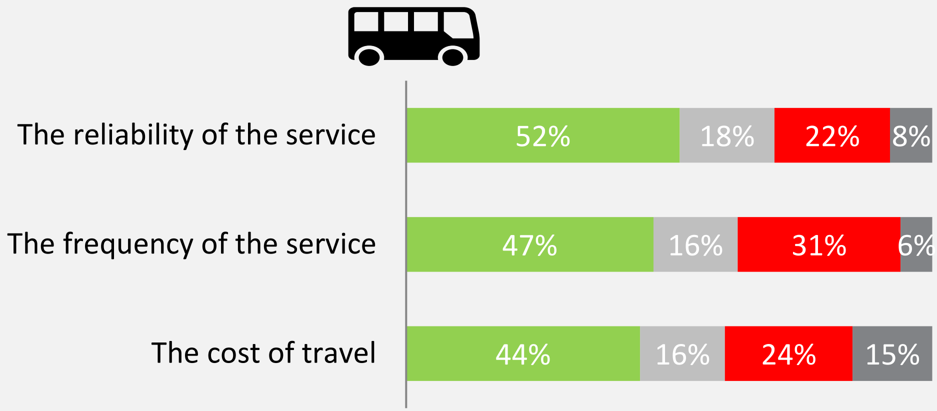
Very/Fairly satisfied
Very/Fairly dissatisfied
Neither satisfied nor dissatisfied
Don't know / Prefer not to say



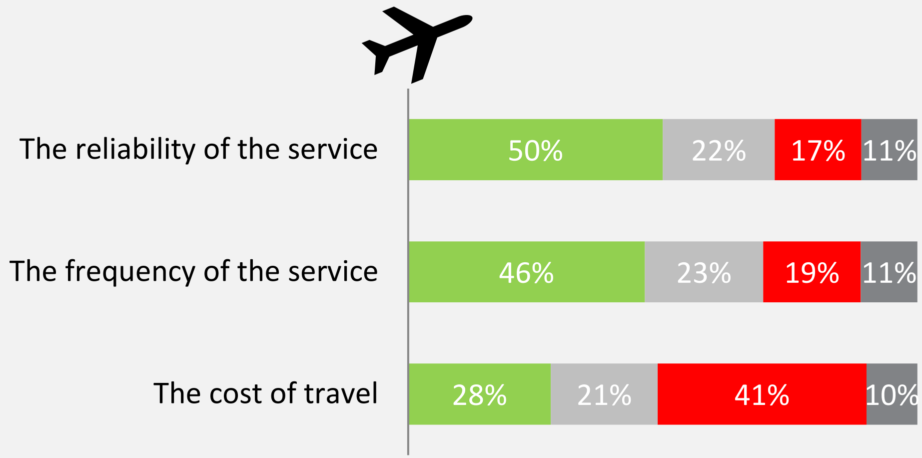
Base: All those who rely on train services (1,950); fieldwork = 28 January – 25 March 2022



Base: All those who rely on ferry services (2,064);); fieldwork = 28 January – 25 March 2022



Base: All those who rely on bus services (2,716); fieldwork = 28 January – 25 March 2022



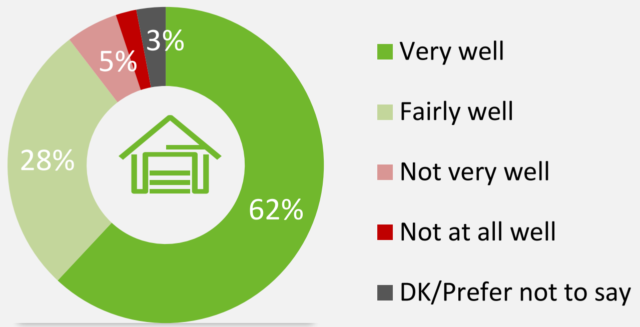
Base: All those who rely on air services (2,341);); fieldwork = 28 January – 25 March 2022

HOUSING SITUATION

9 in 10 households (90%) say their housing situation meets their needs well. However, half (51%) say it is expensive to heat their home and 17% that their home is difficult to heat. These issues are more acute in remote rural and island locations, and among private renters.

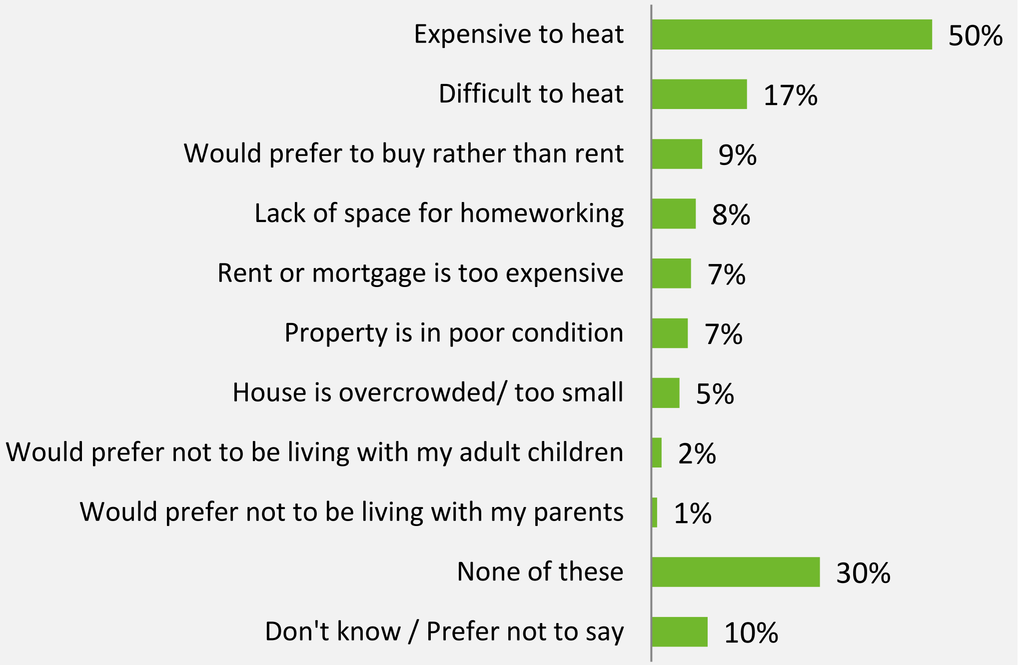
- **Younger people** aged 16-44 (14%), **those with children** living in the household (14%) **and those on the lowest household incomes** (13%) **are more likely to say their housing situation does not meet their needs well** (8% report this overall).
- Households in **remote rural locations** and **islands** are more likely than average to report their home is expensive to heat (56% and 59% respectively) and difficult to heat (21% and 22%).
- In **Shetland**, for example, 63% of households say they find it expensive to heat their home and 23% that their home is difficult to heat. In **Orkney,** 61% say it is expensive to heat their home.
- **Households in Lochaber, Skye and Wester Ross are more likely to say their property is in poor condition** (11%).
- **Those with children at home** are more likely than average to say that there is a lack of space for homeworking (14%) and that their house is overcrowded or too small (12%).
- **Private renters** are more likely to say that their property is expensive to heat (64%), difficult to heat (35%) and in poor condition (17%). Half (52%) of private renters say they would prefer to buy rather than rent.
- Households who felt their housing situation did not meet their needs well are more likely to say most of these factors apply to them. They also express lower levels of pride and optimism about their community.

Q. How well does your current housing situation meet the needs of you and your family?



Base: All households (4,442); fieldwork = 28 January – 25 March 2022

Q. Which if any of the following apply to your current housing situation?



Base: All households (4,442); fieldwork = 28 January – 25 March 2022

EMPLOYMENT SITUATION

Among residents in work, the most common employment sectors are health or social care (18%), teacher training or education (9%), and retail or sales (9%). Half of residents in work report they can't do their job from home at all.

49% **WORK IN THE PRIVATE SECTOR**

42% **WORK IN THE PUBLIC SECTOR**

6% **WORK FOR A CHARITY OR VOLUNTARY ORGANISATION**

13% **OF THOSE AGED 65+ ARE STILL IN WORK**

Those aged 65+ and living in **Lochaber, Skye and Wester Ross** (28%) are more likely than average to be working, while those in **Orkney** (6%), **Shetland** (4%) and **Innse Gall** (5%) are less likely to be.

13% **HAVE MORE THAN ONE JOB**

…higher amongst those living on **islands** (17%) and in **remote rural** locations (17%)

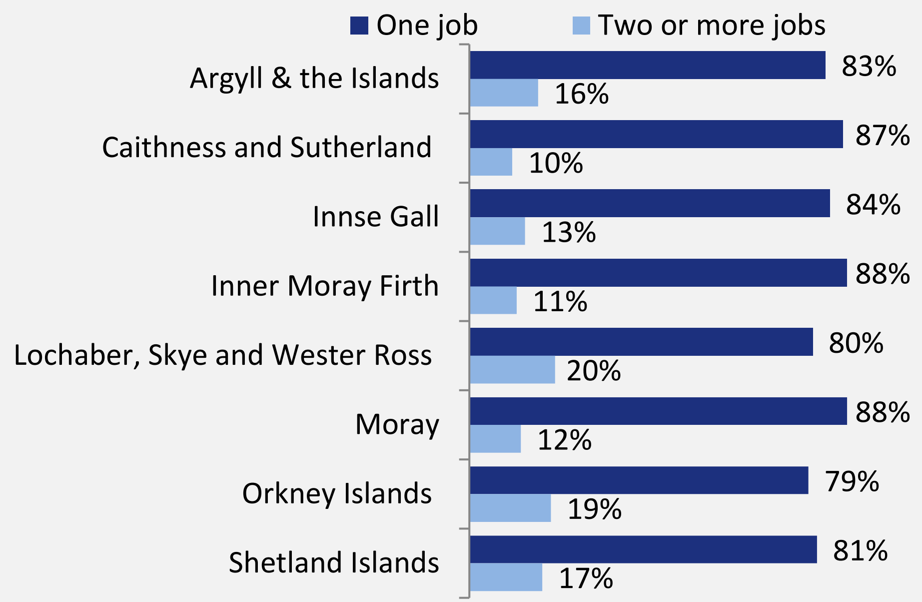
19% **OF THOSE IN WORK ARE SELF-EMPLOYED**

Those who are self-employed are more likely to live in a remote rural (26%) or island location (24%), or to have two or more jobs (22%).

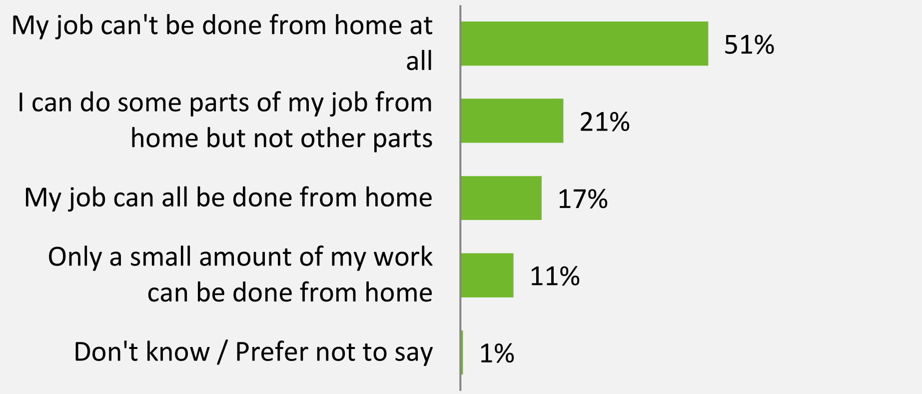
Among those who have more than one job, 51% say this is because they <u>need</u> to, while 46% say it is because they <u>prefer</u> to. Those on the highest annual household incomes (£52,000+) are more likely to say they do more than one job out of preference (67%), while those who earn less than £26,000 are more likely to say this is because they need to (79%).

49% **OF THOSE IN WORK SAY THAT AT LEAST A SMALL AMOUNT OF THEIR JOB CAN BE DONE FROM HOME**

Q: Do you currently have one job or more than one?



Q: Which of the following best describes whether you are able to do your job from home or not?



Base: All residents in work (2,420); fieldwork = 28 January - 25 March 2022

2. IMPACT OF COVID-19 AND THE COST OF LIVING CRISIS ON COMMUNITIES

SUMMARY

- **The COVID-19 pandemic has impacted on Highlands and Islands communities in many ways. It has impacted on people's access to goods and services, with 89% saying it is now more expensive to buy goods and services in their local area** compared to before the pandemic. Two thirds (67%) say they find it more difficult now to get tradespeople to do work around their house, and 61% report that it is more difficult to get hold of the goods they need.

- **The pandemic has also impacted on businesses in the region**, with over half (56%) of households saying that businesses in their local area that closed because of lockdown have not reopened. However, **two thirds of households (67%) say people in their local area have been supporting local businesses more than they used to before the pandemic and 46% feel that new businesses are starting up in their area.**

- **The impact of the pandemic on community events across the region is ongoing**, with seven in ten Highlands and Islands residents (72%) saying that community events cancelled due to the pandemic have not restarted. People living in Orkney or Shetland are more likely to say this (82% and 80% respectively).

- **There is a perception among 45% of the region's residents that more people have moved to their local area because they can work from home.** This perception is higher than average in Innse Gall (59%), Orkney (59%), Argyll and the Islands (52%) and Lochaber, Skye and Wester Ross (52%).

- **Increased numbers of tourists are felt by many to have made it more difficult for local people to access ferry or air services**, with 90% of households in Innse Gall, 57% in Argyll and the Islands and 54% of those in Shetland saying this is the case.

- **Discussion group participants said that a range of goods and services had become more expensive recently, and that scope to save money was limited.** Those living in more rural locations and on islands explained how price increases came on top of an existing "premium" for goods and services in these areas.

- **Due to increased costs, participants said that they, or others they know, felt stressed or worried and had started to use up savings to pay for household bills.**

IMPACT OF COVID-19 ON ACCESSING GOODS AND SERVICES

There is consensus among the region's residents that it is more expensive to buy goods and services now than it was pre-pandemic, with 89% saying this is the case in their local area. Two thirds (67%) say they find it more difficult now to get tradespeople to do work around their house, and 61% that it is more difficult to get hold of the goods they need.

89% say it is more expensive to buy goods and services now than it was before the pandemic

This includes 63% who say that this describes what is happening in their local area <u>very</u> well.

67% feel it has been more difficult to get tradespeople to do work around residents' houses

This is most common in:

- Lochaber, Skye and Wester Ross (74%)
- Caithness and Sutherland (73%)
- Argyll and the Islands (72%).

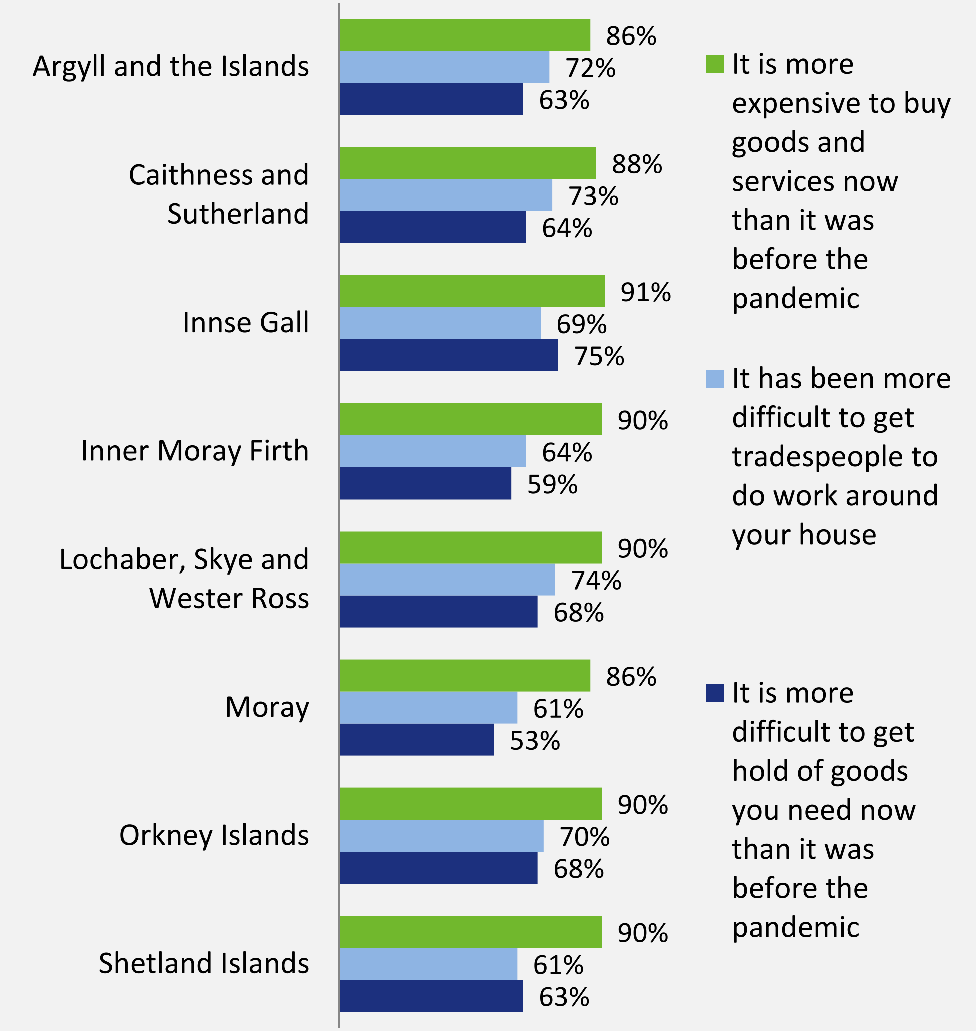
61% have found it more difficult to get hold of goods needed now than it was before the pandemic

This is most common in:

- Innse Gall (75%)
- Lochaber, Skye and Wester Ross (68%)
- Orkney (68%).

Q. To what extent would you say each of these does or does not describe what is happening in your local area?

(% Describes what is happening in my local area very well / somewhat)



Base: All households (4,442); fieldwork = 28 January – 25 March 2022

IMPACT OF COVID-19 ON LOCAL BUSINESSES

Two thirds of households (67%) say people in their local area have been supporting local businesses more than they used to before the pandemic. However, over half (56%) say that businesses in their local area that closed because of lockdown have not reopened.

67% **of households feel people are supporting local businesses more than they used to**

Those living in Orkney were more likely to say this (80%).

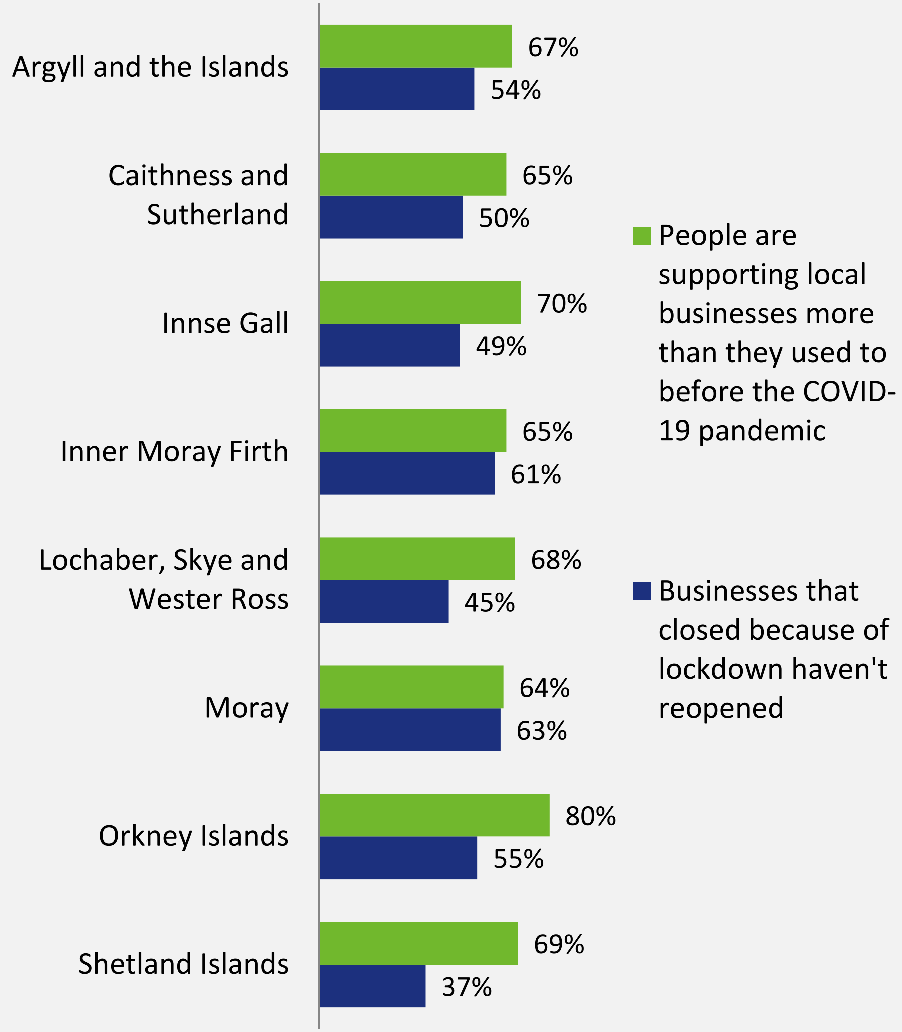
56% **said that businesses in their local area that closed because of lockdown haven't reopened**

Those living in Moray and the Inner Moray Firth were more likely to say this (63% and 61% respectively), while those living in Shetland were less likely to say this (37%).

However, around half of people in the Highlands and Islands (46%) feel that "new businesses are starting up" describes their local area at least somewhat.

Q. To what extent would you say each of these does or does not describe what is happening in your local area?

(% Describes what is happening in my local area very well / somewhat)



Base: All households (4,442); fieldwork = 28 January – 25 March 2022

IMPACT OF COVID-19 ON COMMUNITIES – OTHER IMPACTS

Seven in ten Highlands and Islands residents (72%) report that community events cancelled due to the pandemic have not restarted, while just under half (45%) say that more people have moved to their local area because they can work from home. A third say an increase in tourism has made it hard to access ferry or air services.

72% say that community events cancelled due to the pandemic haven't restarted

People living in Orkney or Shetland are more likely to say this (82% and 80% respectively).

45% think people have been moving to their local area to live because they can work from home

This perception is higher in the following areas:

- Innse Gall (59%)
- Orkney (59%)
- Argyll and the Islands (52%)
- Lochaber, Skye and Wester Ross (52%).

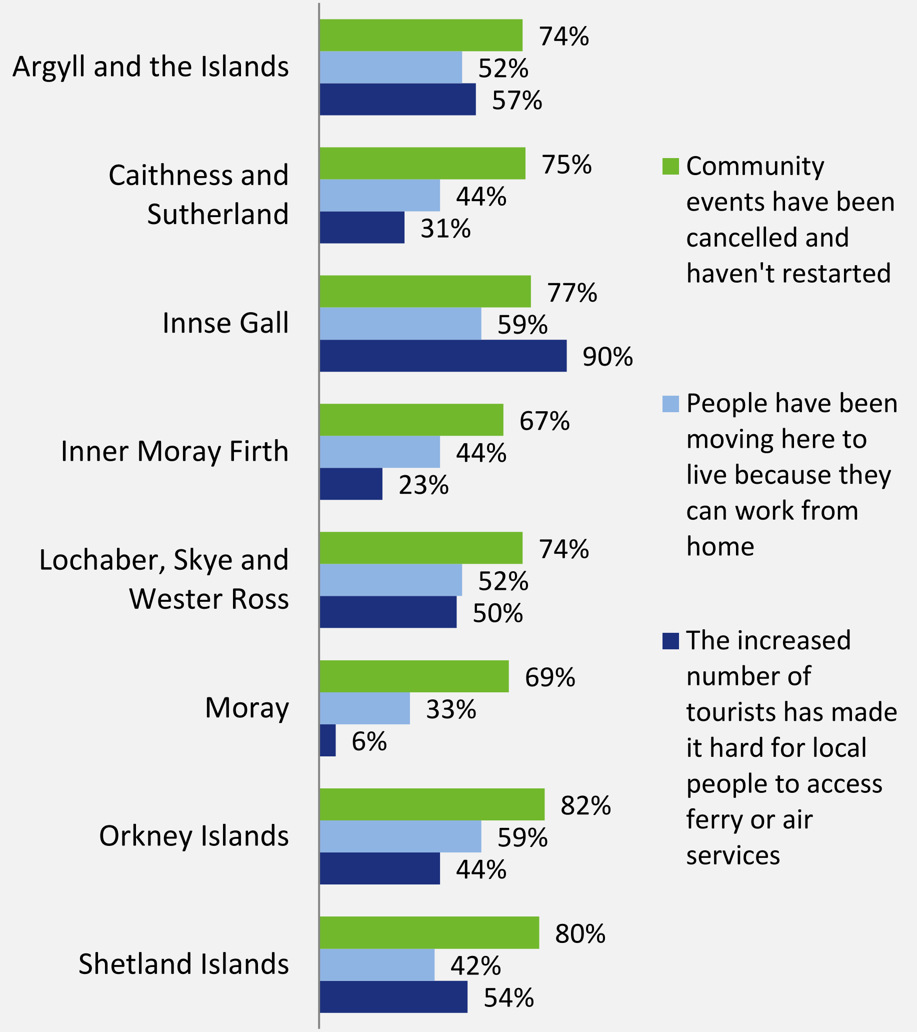
34% say the increased number of tourists has made it hard for local people to access ferry or air services

This perception is highest among those living in:

- Innse Gall (90%)
- Argyll and the Islands (57%)
- Shetland (54%)
- Lochaber, Skye and Wester Ross (50%)
- Orkney (44%).

Q. To what extent would you say each of these does or does not describe what is happening in your local area?

(% Describes what is happening in my local area very well / somewhat)



Base: All households (4,442); fieldwork = 28 January – 25 March 2022

IMPACT OF THE COST OF LIVING CRISIS (1) – DISCUSSION GROUP FINDINGS

Participants explained that a range of goods and services had become more expensive:

- **Transport**, including the cost of petrol/diesel and ferry bookings
- **Household bills**, including oil and gas for heating, electricity, groceries, rent and mortgage payments
- **Raw materials** for house improvements and renovations
- **Goods deliveries** for private households and businesses

Scope to save money was felt to be limited. For example, some areas are not connected to the mains gas grid which restricts people from changing to a cheaper fuel source. There was also a perception that there is a lack of choice of grocery shops which prevents people from shopping around to find better deals.

More widely, an increase in rent and house prices was felt to be linked to an increase in holiday lets, retirees and people moving to the region because they can now work from home.

Participants living in more rural locations and on islands explained how an increase in the cost of living came on top of an existing cost "premium" for goods and services in these areas. For example, it was thought that people living on islands pay more for electricity than elsewhere in Scotland. Rising fuel costs had also impacted on people living in these areas, since they felt reliant on their cars to get around.

> The main [expense] is fuel especially living somewhere rural. I'm quite reliant on my car…The prices we're paying for fuel right now are extortionate.
> **16 – 34 year old participant, Remote/Rural**

IMPACT OF THE COST OF LIVING CRISIS (2) – DISCUSSION GROUP FINDINGS

Due to increased costs, participants said that they, or others they know, **felt stressed or worried** and had started to **use up savings to pay for household bills.** It was also felt that **businesses are struggling to recruit** because it is becoming more expensive to commute.

Changes participants were making or considering making to reduce their spending included:

- **Reducing energy use** by leaving lights off, not using the tumble dryer, lowering or turning off heating or wearing extra clothing
- **Cutting back on 'luxuries'** and premium products or shopping elsewhere
- **Working overtime**
- **Reducing trips,** especially to the mainland
- **Reducing their daily commute** by looking for a new job or moving closer to work
- **Cycling** instead of driving

> Every month I'm just using my savings. I've got about three or four jobs and I still don't make enough to pay for the ever growing cost of living.
> **16-34 year old participant, Accessible/Urban,**

> When I take the boys to [supermarket] it's a case of what we need to get rather than what they want to get which is horrible as a parent.
> **35 – 54 year old participant, Remote/Rural**

Participants who are self-employed highlighted impacts on their business as a result of increased costs, including:

- **Balancing wage increases and prices rises**
- **A downturn in business** as customers reduce spending
- **Increased cost of raw materials**
- **Cutting back on 'luxury items'** provided in holiday accommodation

3. PRIORITY ISSUES ACROSS THE REGION

SUMMARY

- **Many perceive housing challenges in their communities. Housing for local families is the top priority people in the Highlands and Islands identify as being needed for their community to thrive in future**. Young people, households with children and those living in island and remote rural locations are more likely than average to say that a range of housing challenges describe what is happening in their local area.

- **Looking at residents' next highest priority, employment, two thirds of those in work are happy in their current job.** Regarding fair work, just under half say they are paid the Real Living Wage and 46% that they are paid a fair wage. While participants in the discussion groups generally felt that there were employment opportunities in their local area, these **jobs tended to be low-skilled and low-paid, and often seasonal**.

- **One in five residents (22%) say they would like a 'green' job that helps the environment or helps to prevent climate change**. While discussion group participants noted there were some opportunities for green jobs in their local area they said that, if they were to change jobs themselves, **the financial benefits of doing so would generally be more important than any environmental motivations.**

- **Turning to entrepreneurship, one in eight say they want to start a business and become self-employed. Just under half of people in the region feel that "new businesses are starting up" describes their local area at least somewhat.** Those in Orkney are more likely to say new businesses are starting up, while those in Argyll and the Islands and in Caithness and Sutherland are less likely to say this.

- In the discussion groups, potential entrepreneurs said that the availability of **support and advice specifically relevant to their business needs** was important to help them start their own business. Barriers to starting or expanding a business were thought to be: **rising costs, not being able to access or afford the tradespeople required, and not having the time**.

- **When it comes to training and learning opportunities, more than half of residents report they have undertaken courses or training in the past five years for work or their own interest.** However, residents are split on whether local training opportunities mean more young people can stay in the area, with 37% saying this describes their local area at least somewhat and 37% that it does not.

- **Just under a third of residents (30%) feel it would be difficult to access courses or training in person, while 9% feel it would be difficult to do so online.** The top three reasons for finding it difficult to access courses or training are: having to spend time away from home, broadband connection not being reliable enough, and broadband speed being not fast enough. Discussion group participants felt that **training opportunities could be improved if there were more courses available locally and greater collaboration between training providers and local businesses.**

- **Just over half of students are studying at an institution within the Highlands and Islands**. If it had been possible to study the course of interest in the region, 10 out of 18 students might or would definitely have preferred to do so.

HOUSING

Housing for local families is the top priority that people in the Highlands and Islands identify as being needed for their community to thrive in future, ranked as a top priority by 47% of the region's residents.

76% AGREE THAT THERE AREN'T ENOUGH HOUSES THAT CAN BE RENTED AT A REASONABLE PRICE IN THEIR LOCAL AREA

75% AGREE THAT THERE IS A SHORTAGE OF HOUSING FOR LOCAL PEOPLE IN THEIR LOCAL AREA

74% AGREE THAT THE RIGHT TYPES OF HOUSING AREN'T AVAILABLE FOR LOCAL PEOPLE TO RENT OR BUY, AND THAT LOCAL PEOPLE CAN'T AFFORD TO BUY HOUSING

Certain groups are more likely to say that most of these housing challenges describe the situation in their local area at least somewhat:

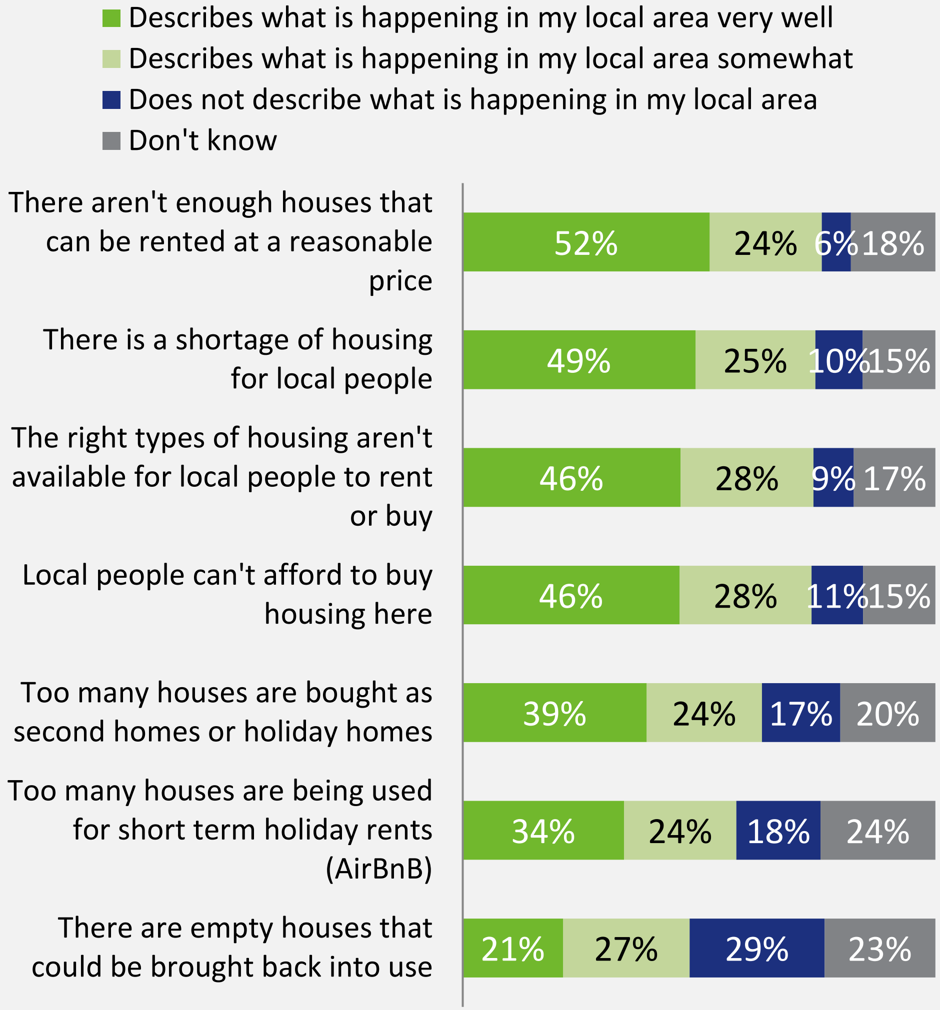
- Young people aged 16-29
- People living on islands, and in remote rural locations
- Those with children in the household
- Those with an annual household income between £26,000 and £51,999

More than 60% of residents in Lochaber, Skye and Wester Ross say each of the first six statements describe their local area very well.

Residents in Argyll and the Islands, Innse Gall, Lochaber Skye and Wester Ross, and Orkney are more likely to agree 'too many houses are being used for short term holiday rents'.

Residents in Orkney and Innse Gall are more likely to say there are empty properties that could be brought back into use.

Q. To what extent does each of these describe the housing situation in your local area?



Base: all households (4,442); fieldwork = 28 January - 25 March 2022

Newer residents (who have lived in the region for up to a year) are more likely to say they don't know if there are enough houses that can be rented at a reasonable price (27%), if there is a housing shortage for local people (24%), or if local people can't afford to buy housing (23%).

EMPLOYMENT

Two thirds of those in work say they are happy in their current job. Regarding fair work, just under half say they are paid the Real Living Wage and 46% that they are paid a fair wage. Those on the highest incomes (living in households earning £52,000+ annually) are more likely to say most of these fair work statements apply to them.

Some groups are more likely to say that particular aspects of Fair Work apply to them in their current job:

- Men - paid a fair wage (50%)
- Older people (aged 65+) - happy in current job (72%)
- Young people (aged 16-29) - opportunities to develop skills (53%) and good promotion opportunities (24%)
- Shetland residents - happy in current job (74%) and paid the Real Living Wage (61%)
- Employees compared to self-employed - paid the Real Living Wage (55% vs 25%), paid a fair wage (50% vs 29%), opportunities to develop skills (46% vs 29%), easy to balance work and personal responsibilities (39% vs 20%)
- Public sector compared to private sector - paid the Real Living Wage (55% vs 44%), paid a fair wage (51% vs 42%), opportunities to develop skills (47% vs 35%), easy to balance work and personal responsibilities (38% vs 31%), and good promotion opportunities (18% vs 13%).

Those on low incomes (annual household earnings of £15,599 or less) are more likely to say none of these aspects of fair work apply to them (11%, compared with 5% overall).

Q. Which if any of the following would you say apply to you in your current job?

Base: all in work, aged 16+ (2,240); fieldwork = 28 January - 25 March 2022

EMPLOYMENT – DISCUSSION GROUP FINDINGS

Participants generally felt that there were local employment opportunities. However, they noted that jobs tend to be low-skilled and low-paid, and often seasonal, and so expected that most job seekers looked for better-paid jobs elsewhere, particularly offshore. Furthermore, participants with younger family members studying elsewhere in Scotland thought there would be limited employment opportunities available to them in their field of study if they were to return to their local area.

Participants were aware of job opportunities in the hospitality and tourism sector in their local area in particular. It was thought that, as a result of the pandemic and Brexit, these employers are now struggling to recruit new staff, to the extent that some business have closed or reduced their trading hours.

> We used to have a lot of foreign workers that would come up specifically for the summer months. [A local food business has] not been able to open this year because they haven't got the staff.
> **35–54 year old participant, Remote/Rural**

The availability and cost of housing was mentioned across the groups as a potential barrier to employment for those wanting to move to an area to take up a new job. While homeworking had opened up employment opportunities to some, it was felt that this, and an increase in holiday lets and retirees moving to some areas, had exacerbated challenges in the housing market.

> I know someone who got offered a job in Stornoway but she couldn't take it because she couldn't get anywhere to live.
> **35–54 year old participant, Remote/Rural**

It was suggested that government investment in local businesses, particularly to help start-ups, was needed to improve job opportunities. On the local economy more widely, high delivery costs to the Highlands and Islands was raised as an issue, alongside a need for more reliable ferry links and improved broadband.

ENTREPRENEURSHIP

Just under half of people in the Highlands and Islands feel that "new businesses are starting up" describes their local area at least somewhat. There is variation within the region, with those in Orkney more likely to say this, while those in Argyll and the Islands and in Caithness and Sutherland are less likely to say this.

One in five residents (22%) would like a 'green' job that helps the environment or helps to prevent climate change. One in eight (12%) say they want to start a business and become self-employed.

22% WOULD LIKE A JOB THAT HELPS THE ENVIRONMENT OR HELPS TO PREVENT CLIMATE CHANGE

Certain groups are more likely to say they would like a job that helps the environment:

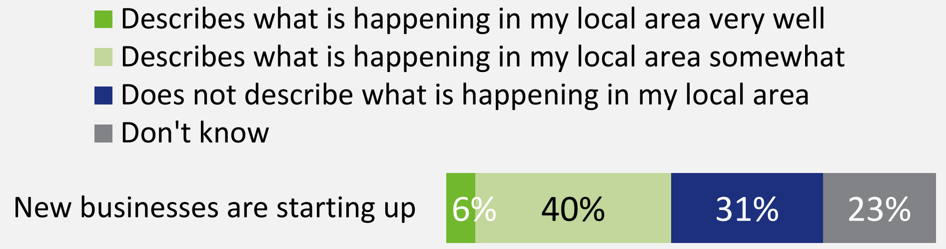
- People living in accessible rural areas (30%)
- New residents (those who have lived in the region for less than a year) (39%), and those who plan to stay for up to a year (33%).

12% WANT TO START A BUSINESS AND BECOME SELF-EMPLOYED

Certain groups are more likely to say they would like to do this:

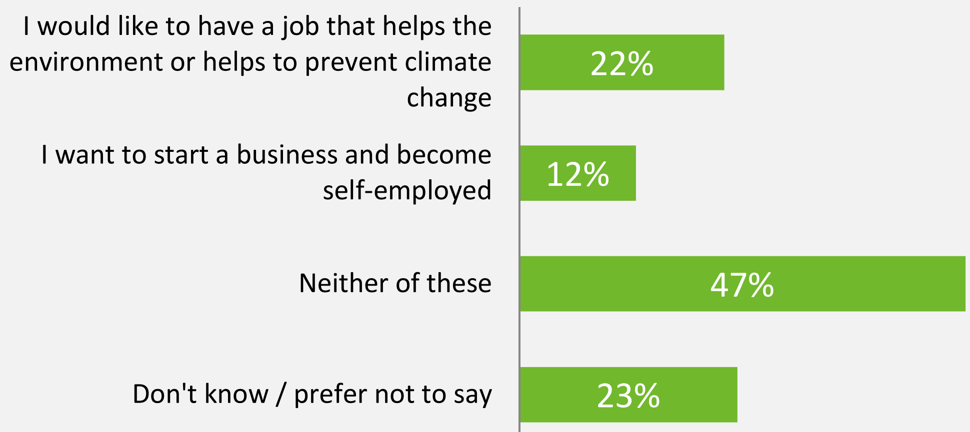
- Men (16%)
- Residents who have lived in the region for between 1 and 5 years (18%)
- Residents who plan to stay in the region for up to 1 year (24%), and those who plan to stay for between 5 and 10 years (19%).

Q. To what extent would you say each of these does or does not describe what is happening in your local area?



Base: all households (4,442); fieldwork = 28 January - 25 March 2022

Q. Thinking about your working situation over the next five years, which of these apply to you, if any?



Base: all who are employees, looking for work or studying, aged 16+ (2,031); fieldwork = 28 January - 25 March 2022

ENTREPRENEURSHIP – DISCUSSION GROUP FINDINGS (1)

Motivations for starting a business

Participants' **motivations** for being interested in starting their own business included: providing services they believed were needed in the local community, autonomy, flexibility and work-life balance, financial motivations, and doing work that aligned better with their personal interests.

The **types of businesses** potential entrepreneurs were interested in setting up included: an electric vehicle repair business, tourist accommodation businesses (e.g. glamping, AirBnB), fitness and wellbeing coaching, retail businesses (e.g. a zero waste store, a model toy shop) and a glass craft business.

Views on business support available

The **availability of support and advice specifically relevant to their business needs** at particular points in their start-up journey was felt to be important. Participants were not always clear on what support was available and there were those who had found it a challenge to navigate the business support landscape in the region, which had left them feeling overwhelmed.

Among participants, there was a desire for any consultants/trainers providing business support to be familiar with the region and the nature of business they were starting. One theme that emerged from the group of potential entrepreneurs in remote/rural areas was the sense that existing business support targeted larger projects and could be overly focussed on scaling up and exports.

> " Everything I've done with HIE is geared towards growth and big businesses, but in remote areas, solid, sustainable, small businesses are possibly more valuable to the local economy than focussing on exporting around the world.
>
> **Potential Entrepreneur, Remote/Rural**

ENTREPRENEURSHIP – DISCUSSION GROUP FINDINGS (2)

Barriers to starting a business

The range of barriers participants mentioned to starting or expanding their own business included: rising costs, not being able to access or afford the tradespeople needed, and not having the time.

For example, a common barrier identified was difficulty sourcing skilled tradespeople and affording building materials (such as timber or fencing) that could help to expand a business. It was noted that when tradespeople were available, they were often expensive or did not possess the requisite technical skills. There was also consensus that too few tradespeople were available to service remote communities.

> “ Getting people to do the various trades that we knew we couldn’t do, was a huge barrier … The costs were astronomical.
> **Potential Entrepreneur, Accessible/Urban**

For participants looking to start a retail business, the rental fees of retail premises were mentioned as a particular barrier.

> “ The smallest unit in the [retail centre] was £24,000 a year. The biggest ones were half a million [pounds]. It’s just extortionate in the city centre, and it needs to be more accessible for local businesses rather than the bigger chains.
> **Potential Entrepreneur, Accessible/Urban**

Time was also mentioned as a barrier, particularly among those working in other jobs. One participant from a remote rural community explained that because they felt responsible for helping out with essential jobs in the community (such as delivering mail) this impacted on the time available to focus on their own business.

SKILLS AND TRAINING (1)

More than half of residents (52%) have undertaken courses or training in the past five years for work or their own interest, with over a third studying in person, and a third online.[1] 45% have not undertaken any courses or training in that time period.

Residents are split on whether local training opportunities mean more young people can stay in the area, with 37% saying this describes their local area at least somewhat and 37% that it does not.

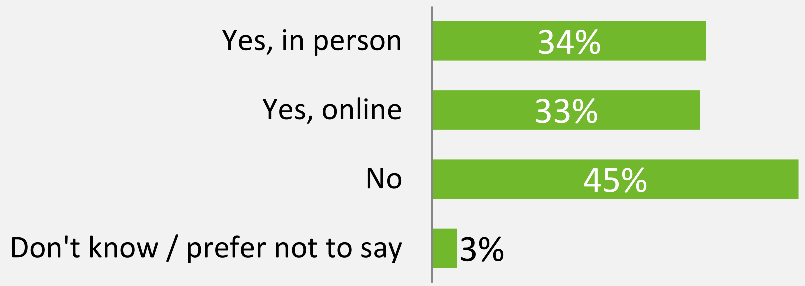
Some groups *are less likely* to have undertaken courses or training:

- Men (49%)
- Older people (aged 65+) (74%)
- Those with annual household earnings of less than £15,599 (63%) and between £15,600 and £25,999 (50%)
- People with a limiting health condition (57%).

Residents of some areas in the Highlands and Islands are more likely than others to say that local training opportunities mean more young people can stay in the area:

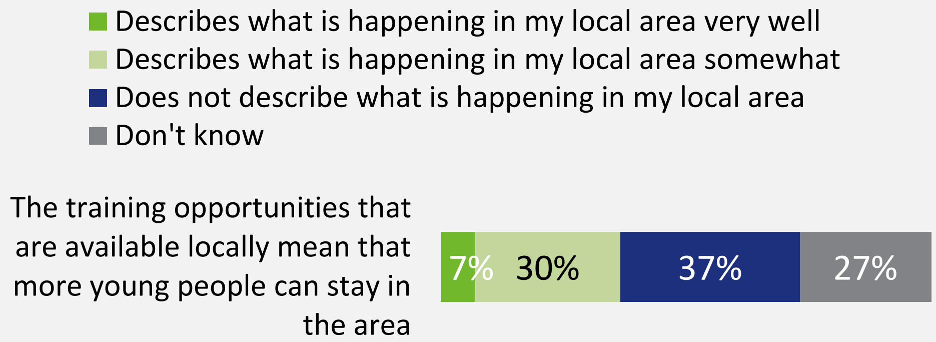
- Residents in Orkney (54%) and Shetland (55%), in towns (41%) and in the least deprived areas (49%) are more likely to say this describes their local area *at least somewhat*
- In contrast, residents in Argyll and the Islands (50%), Caithness and Sutherland (46%), Lochaber, Skye and Wester Ross (51%), and in remote rural areas (45%) are more likely to say it *does not.*

Q. Have you undertaken any courses or training either for your work or for your own interest in the past five years?



Base: all residents, aged 16+ (5,301); fieldwork = 28 January - 25 March 2022

Q. To what extent would you say each of these does or does not describe what is happening in your local area?



Base: all households (4,442); fieldwork = 28 January - 25 March 2022

NOTES

[1]Figures do not sum as some people studied both online and in person

SKILLS AND TRAINING (2)

Just under a third of residents (30%) feel it would be difficult to access courses or training in person, while 9% feel it would be difficult to do so online.

The top three reasons for finding it difficult to access courses or training are: having to spend time away from home, broadband connection not being reliable enough, and broadband speed not being fast enough.

Some groups were more likely to find it *difficult to attend in person*:

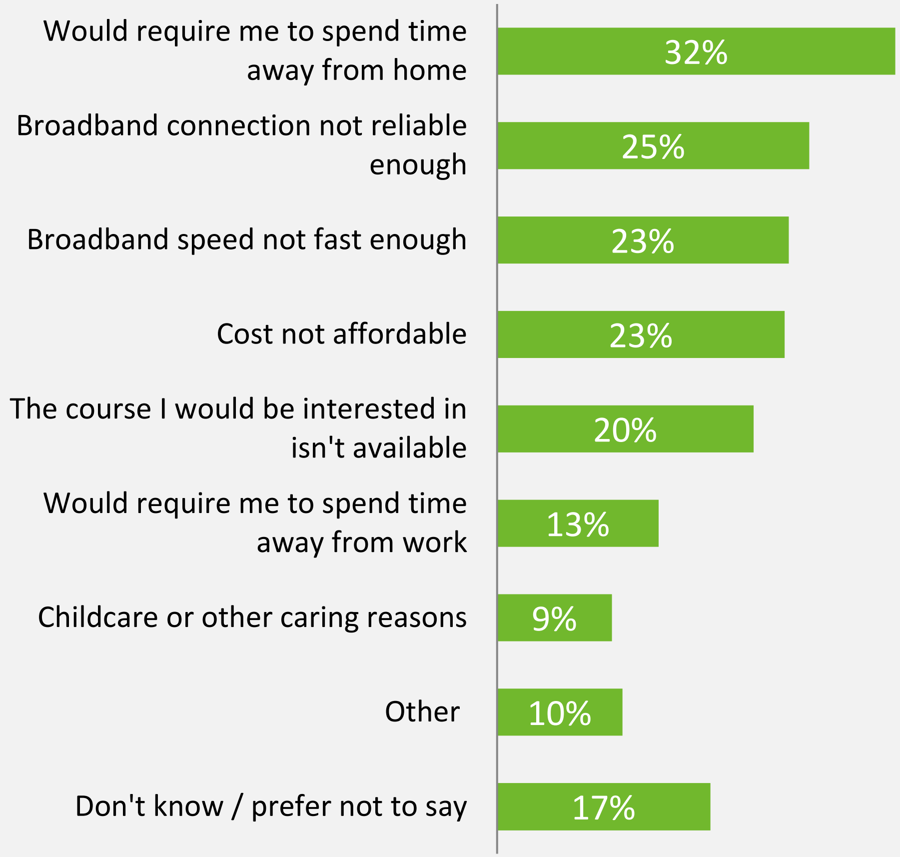
- People who are self-employed (40%), and people who work in the private sector (39%)
- People living in remote rural areas (46%) and people living on islands (41%).

People living in remote rural areas were also more likely to find it *difficult to access courses or training online (13%).*

Certain factors were more likely to be a challenge for some groups:

- Residents in accessible rural areas – broadband connection (40%) and speed (38%)
- Those working full time – having to spend time away from home (50%)
- Residents in towns, and those on the lowest incomes (annual household earnings of £15,599 or less) – cost (36% and 34%)
- Households with children – childcare or caring reasons (43%).

Q. Why do you think it would be difficult to access an educational course or a work-related training course from where you live?



Base: all who think it would be difficult to access learning, aged 16+ (853); fieldwork = 28 January - 25 March 2022

SKILLS AND TRAINING – DISCUSSION GROUP FINDINGS

Participants were aware of training courses and apprenticeships available in local industries, such as trades, maritime, hospitality, and whisky distilleries. In some cases, training and apprenticeships were available locally, while in others participants mentioned they would have to travel elsewhere if they wanted to do this, which could be a barrier to those with family commitments.

Participants who had accessed training courses through their employer were generally satisfied that these helped them to carry out their job effectively. However, if they wanted to access training courses independently, outside their job, it was felt that these could be prohibitively expensive, particularly in terms of travel and accommodation costs if they had to attend courses away from home.

In terms of apprenticeships, participants were unsure if there would be permanent job opportunities available at the end of these. They also mentioned the challenge of living independently on apprenticeship wages.

> "I think if you want to reskill as an adult it's very, very difficult…they put you back on to apprenticeship wages if you do a Modern Apprenticeship.
> **16–34 year old participant, Accessible/Urban**

Participants thought that training opportunities could be improved if there were more courses available locally and greater collaboration between training providers and local businesses so students can gain practical experience without having to travel, to the mainland in particular.

STUDYING

Just over half of students are studying at an institution within the Highlands and Islands.

Of those studying within the region (33 students):

- 7 study at a campus within a 15-20 minute walk of their home
- 17 study at a campus within a 20-minute drive of their local area
- 8 study at a campus further away within the region.

In terms of qualifications, **41%** were studying for an ordinary or honours degree, **38%** for Nationals, Highers or Advanced Highers, **11%** for a post-graduate qualification and **10%** for an HNC/HND or equivalent.

There is a mix of course organisation:

29% All in-person on campus

30% Mostly in-person with some online teaching

27% Mostly online with some in-person teaching

14% All online

The top three reasons for studying outside the region are:

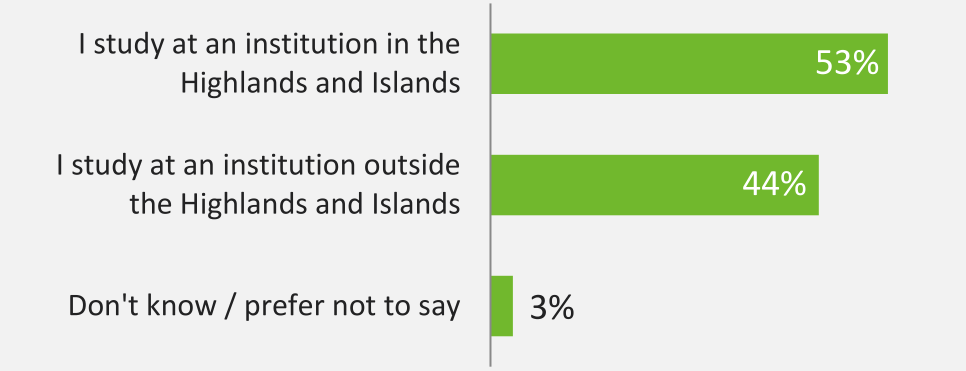
- Wasn't possible to study the course they wanted to in the region (19 mentions from 24 respondents)
- For the reputation of the college or university (10 mentions)
- For new experiences (8 mentions)

If it had been possible to study the course of interest in the region, **10 out of 18 students** might or would definitely have preferred to do so.

NOTES

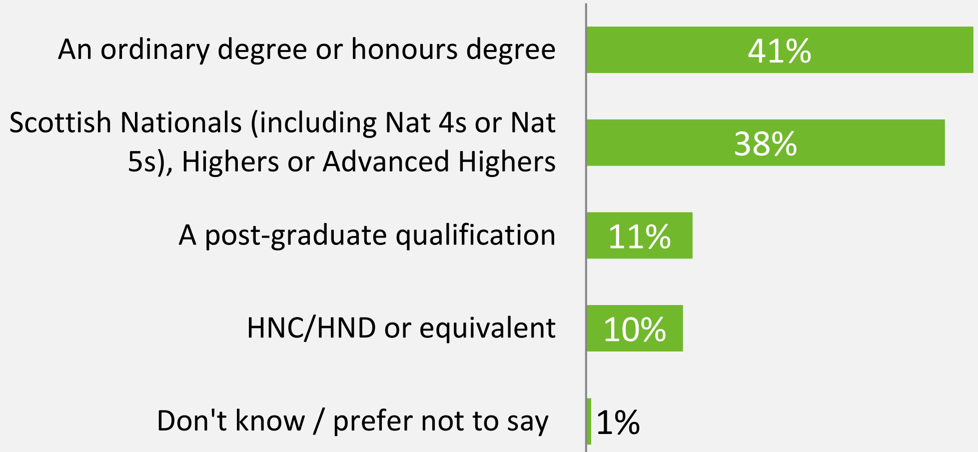
Findings should be interpreted with caution, given the low base size for students (59).

Q. Which of the following best describes your current studying situation?



Base: all students, aged 16+ (59); fieldwork = 28 January - 25 March 2022

Q. What type of qualification are you studying for?



Base: all students, aged 16+ (59); fieldwork = 28 January - 25 March 2022

4. PEOPLE ATTRACTION AND RETENTION

SUMMARY

- **Residents' pride in living in their local area is high across all areas of the Highlands and Islands.** Those living in Orkney, Innse Gall, Lochaber, Skye and Wester Ross, and Argyll and the Islands are especially likely to take pride in living in their local area. Though still high (at around 70%), pride is lowest among those living in the most deprived areas, those who plan to stay in their local area for less than five years and young people aged 16-29.

- **Just over half of residents report taking part in activities in their local community.** Most commonly these were attending local community events, local groups or sports clubs, or volunteering for a charity, social enterprise or community group.

- **Despite fairly high community participation, views on whether local people can influence local decision making are mixed**: while around a third agree local people are able to influence local decision making, a third disagree, and a further third neither agree nor disagree.

- **More than a third of residents say they have always lived in the Highlands and Islands. Just over two-thirds have lived in their local area for more than ten years, while one in five have lived there for fewer than five years.** Residents in Orkney are more likely to have lived in their local area for less than five years.

- **Half of residents say they do not intend to move away from their local area, while 14% say they plan to stay for five years or less.** Most notably, almost half (47%) of those aged 16-29 plan to move away in the next five years, compared to 14% overall.

- **Among those who had not always lived in the Highlands and Islands, the main reasons for moving to the region had been for a better quality of life, to take up a job or be closer to family.** Residents living on islands and in remote rural locations were more likely to have moved to the Highlands and Islands for a better quality of life.

- **In terms of current, local migration, around half of households feel that most of the people who move to their local area are retired or that people are leaving because they can't find work. However, three in ten say people are moving to their local area for new job opportunities.**

PRIDE

Residents' pride in living in their local area is high across all areas of the Highlands and Islands. Those living in Orkney, Innse Gall, Lochaber, Skye and Wester Ross, and Argyll and the Islands are especially likely to take pride in living in their local area.

88% **TAKE A GREAT DEAL OR A FAIR AMOUNT OF PRIDE IN LIVING IN THEIR LOCAL AREA**

Levels of pride were highest amongst:

- Those **living on islands** (94%) and in **remote rural locations** (92%)
- Those who planned to **stay in their local area for 5 or more years** (93%)
- **Older people aged 65 or more** (92%)
- Those living in the **least deprived (SIMD 5) areas** (92%).

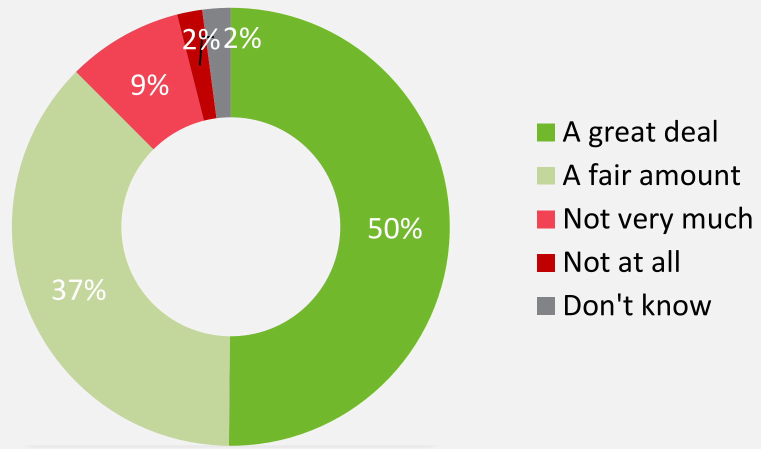
The areas with the highest levels of pride are:

- Orkney
- Innse Gall
- Lochaber, Skye and Wester Ross
- Argyll and the Islands.

In contrast, though still high, pride was lowest amongst:

- Those living in the **most deprived (SIMD 1) areas** (73%)
- Those who planned to **stay in their local area for less than 5 years** (70%)
- **Young people aged 16-29** (68%).

Q. Overall, how much would you say you take pride in living in your local area?



Base: All residents, aged 16+ (5,301); fieldwork = 28 January - 25 March 2022

PARTICIPATION AND LOCAL DECISION MAKING

Just over half of residents (55%) took part in activities in their local community. Most commonly these were attending local community events (39%), local groups or sports clubs (30%) or volunteering for a charity, social enterprise or community group (21%).

There is scope to improve feelings of influence over local decision making. Residents are split on this: while around a third agree local people are able to influence local decision making, a third disagree, and three in ten neither agree nor disagree.

Participation

39% ATTEND LOCAL COMMUNITY EVENTS

30% ARE MEMBERS OF LOCAL GROUPS OR SPORTS CLUBS

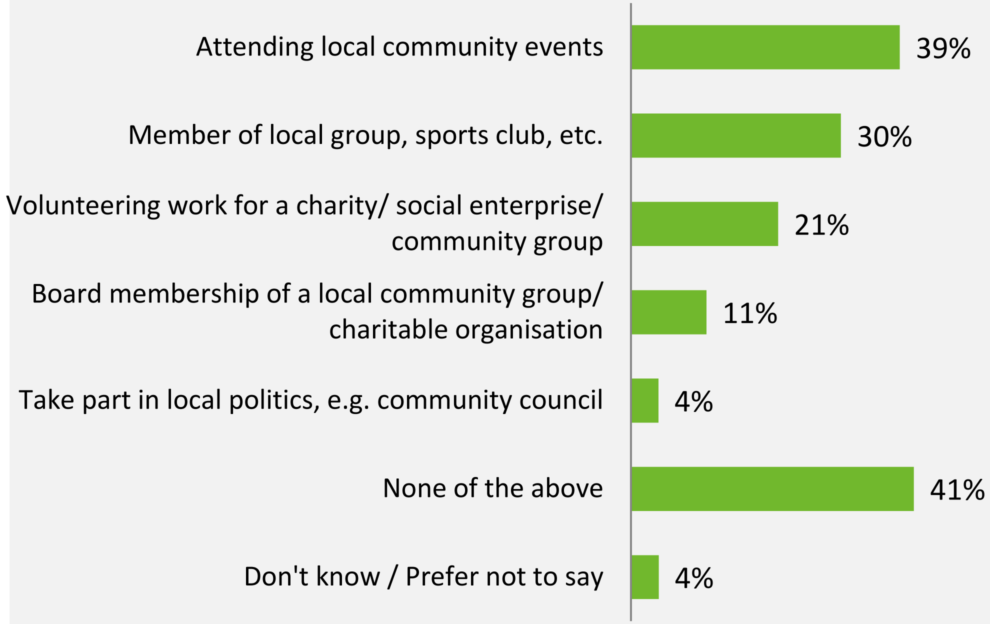
21% VOLUNTEER

Those living on islands and in **remote rural locations,** and **those aged over 30,** were more likely to:

- Attend local community events
- Volunteer
- Be a board membership of a local community group / charitable organisation.

Board membership is more common in Innse Gall (18%), Lochaber Skye and Wester Ross (15%), Orkney (16%) and Shetland (15%).

Q: Which of the following do you personally participate in as part of your community, if any?



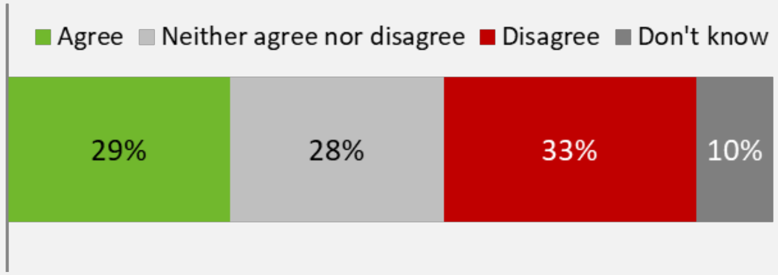
Base: All residents, aged 16+ (5,301); fieldwork = 28 January - 25 March 2022

Local decision making

29% AGREE THAT LOCAL PEOPLE CAN INFLUENCE DECISION MAKING IN THEIR LOCAL AREA

This rises to 33% amongst those **living on islands** and 35% of those in the **least deprived (SIMD 5) areas.**

Q: To what extent would you agree or disagree that local people are able to influence decisions made about your local area?



Base: All residents, aged 16+ (5,301); fieldwork = 28 January - 25 March 2022

LENGTH OF RESIDENCY AND FUTURE PLANS

Just over a third of residents say they have always lived in the Highlands and Islands. A majority say they have lived in their local area for more than ten years, while one in five have lived there for less than five years.

Half of residents say they do not intend to move away from their local area, while 14% say they plan to stay for five years or less.

Length of residency in the Highlands and Islands

37% HAVE ALWAYS LIVED IN THE HIGHLANDS AND ISLANDS

Those living in the **Shetland Islands** (59%) and **Caithness and Sutherland** (56%) are more likely to say they have always lived there.

Seven in 10 (69%) have lived in their local area for more than ten years, including half (50%) for more than twenty years.

Almost a fifth (18%) have lived in their local area for less than five years, with residents in **Orkney** (25%) more likely to say this.

Plans to stay in the local area

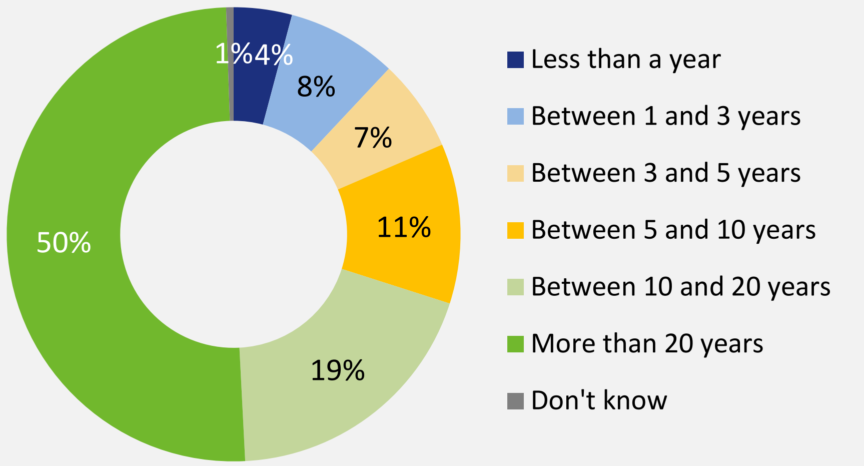
Those most likely to say they do not intend to move are:

- Residents aged 45 years and older (59%)
- Those who are optimistic about their community's future (59%)
- People living in Innse Gall (57%).

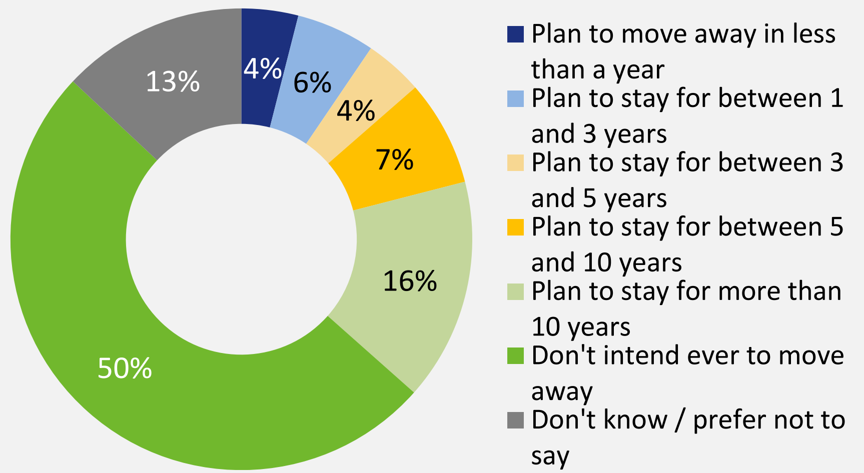
Those most likely to move away from their local area in the next five years are:

- Young people aged 16-29 (47%)
- Those who have lived in their local area for up to a year (28%)
- Residents who feel pessimistic about their community (27%).

Q: How long have you lived in your local area?



Q: Which of these best describes how long you plan to stay in the local area where you currently live?

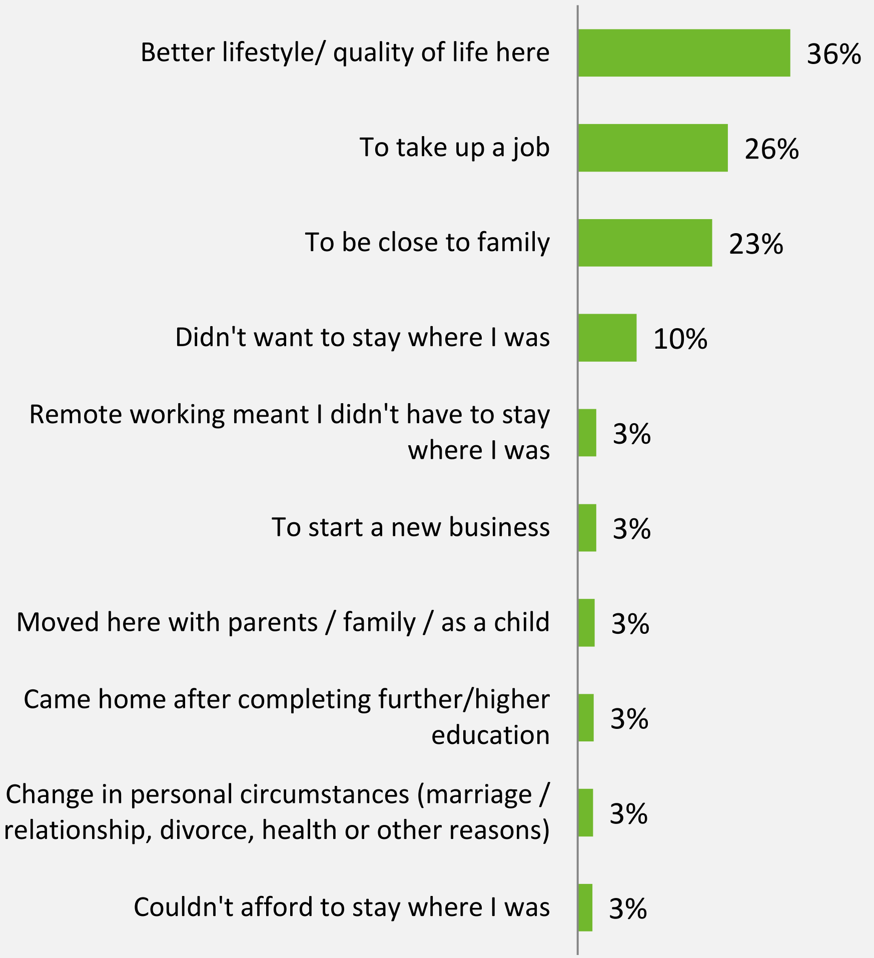


Base: All residents, aged 16+ (5,301); fieldwork = 28 January - 25 March 2022

REASONS FOR MOVING TO THE HIGHLANDS AND ISLANDS

Among those who had not always lived in the Highlands and Islands, the main reasons for moving to the region had been for a better quality of life, to take up a job or be closer to family.

Q: Why did you move to, or move back to, the Highlands and Islands?
[Top ten reasons]



Base: All residents who have not always lived in the Highlands and Islands, aged 16+ (3,449); fieldwork = 28 January - 25 March 2022

Better lifestyle / quality of life

Residents **living on islands** (46%) and in **remote rural locations** (44%) were more likely to have moved to the Highlands and Islands for a better quality of life.

Residents of **Argyll and the Islands** were more likely than average to say they moved there for a better quality of life (47%).

To take up a job

Residents **working in the public sector** (34%), **men** (31%) and those living in **urban locations** (30%) were more likely to have moved to the Highlands and Islands to take up a job.

Residents living in **Innse Gall** and **Caithness and Sutherland** were less likely to say this (15% and 17%).

To be close to family

Residents with **children living in their household** (30%) and **women** (27%) were more likely to have moved to the Highlands and Islands to be close to family.

MIGRATION

Around half of households feel that most of the people who move to their local area are retired or that people are leaving because they can't find work. However, three in ten (29%) say people are moving to their local area for new job opportunities.

56% **say most of the people who move to their local area are retired**

21% say this statement describes their local area very well. This is most common in:
- Argyll and the Islands
- Innse Gall
- Lochaber, Skye and Wester Ross
- Caithness and Sutherland.

47% **feel that people are leaving because they can't find work**

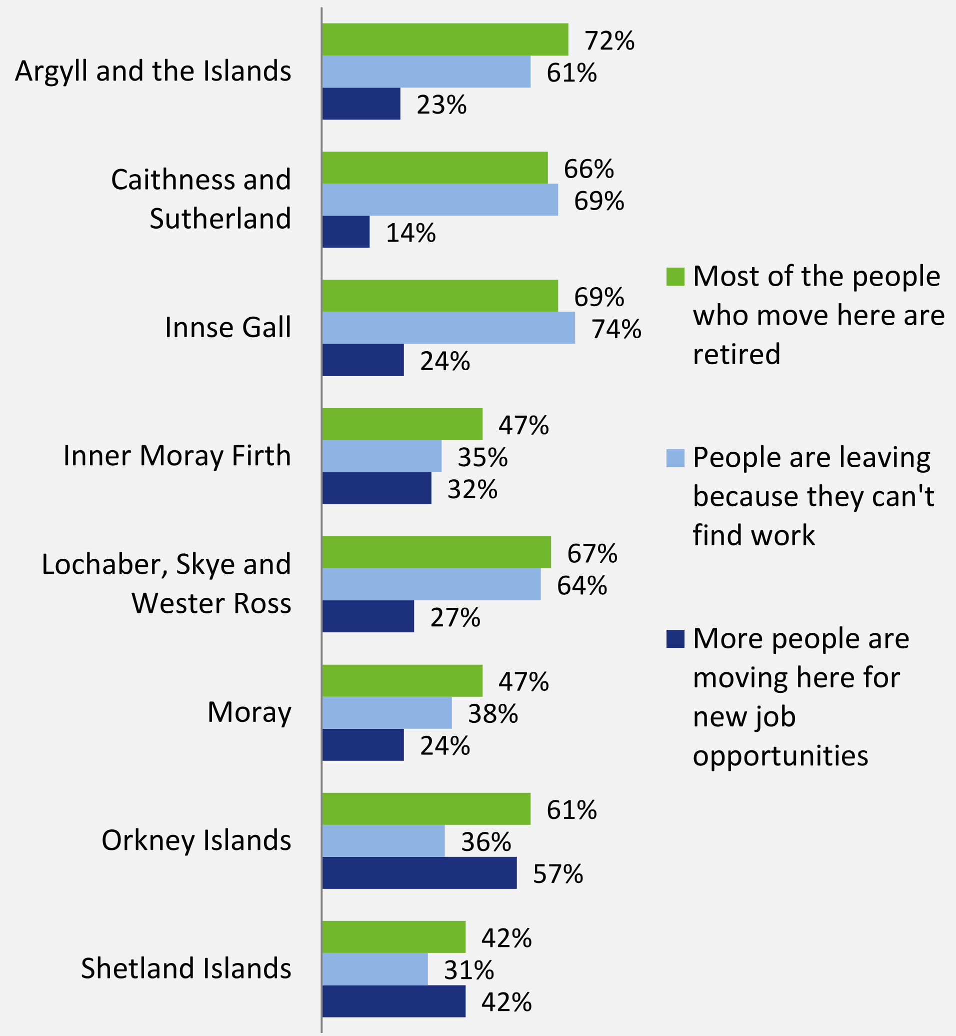
16% say this statement describes their local area very well. This is most common in:
- Innse Gall
- Caithness and Sutherland
- Lochaber, Skye and Wester Ross
- Argyll and the Islands.
- Young people aged 16-29 are more likely to say this describes their local area at least somewhat (55%).

29% **say that more people are moving to their local area for new job opportunities**

7% say this statement describes their local area very well. This is most common in:
- Orkney Islands
- Shetland Islands
- Inner Moray Firth.

Q. To what extent would you say each of these does or does not describe what is happening in your local area?

(% Describes what is happening in my local area very well / somewhat)



Base: All households (4,442); fieldwork = 28 January – 25 March 2022

5. TOWARDS NET ZERO

KEY FINDINGS: TOWARDS NET ZERO (1)

- **The most commonly used energy sources for home heating are electricity, mains gas, oil and wood or other biomass. 13% of Highlands and Islands households report they are currently using green technology to heat their home:** air source heat pumps (7%) and solar panels (5%) are the most used green technologies for home heating in the region.

- **When it comes to the next two to three years, only around a third of households are planning to make home energy efficiency improvements.** The most common improvements planned are installing a smart meter (16%), having a new boiler or heating system installed (11%) and draught proofing (9%).

- **Among discussion group participants, cost was cited as a central barrier to making homes more energy efficient** and it was felt that more information was needed on the impact and benefits of net zero changes.

- **Just 6% of households are planning to switch fuel type in the next two to three years.** Among households that are not planning to make this change, cost ('too expensive to make the change') is the reason given by more than half. Other common reasons are not wanting to make this change (34%) and not enough financial support being available from government to do so (30%).

- **Information provision and public engagement has a role to play in encouraging residents to switch fuel type:** 13% of households not planning to change the fuel type they use say that they do not know how to go about it or need more information.

- **7% of households have bought or leased an electric or hybrid car**, while 6% are planning to do so in the next two to three years, and a further 24% are considering it but have not yet made a decision. A quarter (26%) have thought about an electric/hybrid car and decided against it.

- **Cost and range are key concerns that need addressing when it comes to electric or hybrid cars**, with more than 80% of residents finding it convincing that 'electric/hybrid cars are too expensive' and 'the distance electric cars are able to travel on a single charge is not far enough'. Lack of public charging points was also a concern for three-quarters.

- **Two in five of those in work expect that their job will not be affected by the need to reduce carbon emissions in future, while almost one in five say it would be difficult for their job to adapt to these changes.** Among those who do think their job would need to adapt, the most commonly expected impacts of the changes for them personally are to be able to work with new technology and the need to invest in new tools or equipment.

TOWARDS NET ZERO – ENERGY SOURCES

The most commonly used energy sources for home heating are electricity, gas, oil and wood/biomass. Air source heat pumps (7%) and solar panels (5%) are the most used green technologies for home heating. Orkney residents are especially likely to use an air source heat pump to heat their home (36%).

Variations in current use of green technology in households

- Solar panels are most common among households with older residents aged 65+ (7%)
- Solar panels are used by more households in rural areas (7%) than urban areas (2%)
- Households in Orkney are much more likely than the regional average to report using air source heat pumps (36%).

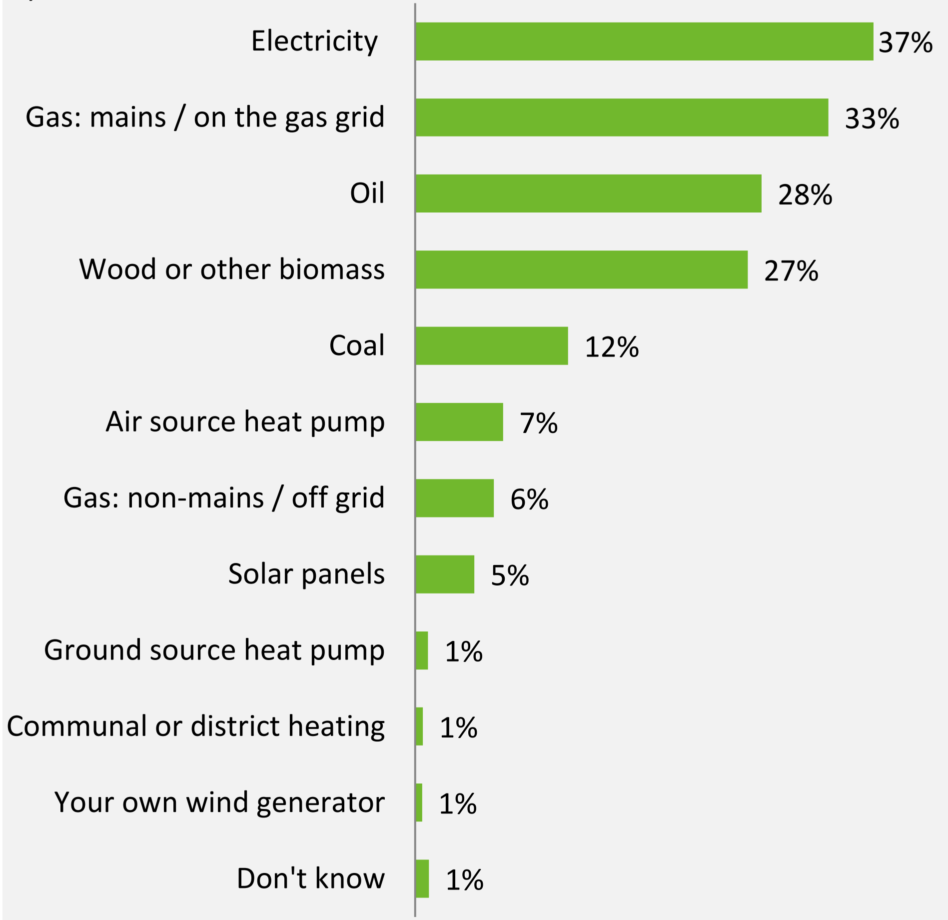
Oil use is more common in accessible rural (41%) and remote rural (44%) areas. Similarly, electricity is more common in remote rural areas, (40%) while mains gas use is more common in urban areas (65%), reflecting access to the grid.

Households on the lowest incomes (£15,599 per annum or less) are more likely to use electricity (43%). Those on the highest incomes of £52,000 or more per annum are more likely to be using oil (36%) and wood or other biomass (37%).

Looking at tenure, renters are more likely to be using electricity (50%), although there is some variation for those renting from a local authority or housing association, with 41% using mains gas and 13% using an air source heat pump.

People living in a house with a working croft are more likely to use oil (60% of these households), wood or other biomass (42%) and coal (26%).

Q. Which of these types or sources of energy do you use to heat your home?



Base: All households (4,442); fieldwork = 28 January - 25 March 2022

NOTES

In this report, green technology refers to air/ground source heat pumps, solar panels and wind generators.

TOWARDS NET ZERO – ENERGY EFFICIENCY IMPROVEMENTS

Around a third of households are planning to make energy efficiency improvements in the next two to three years. The most commonly planned actions are having a smart meter fitted (16%), installing a new boiler/heating system (11%) and/or draught proofing (9%). Around a quarter of households cannot plan any improvements either because they are renting and so it is beyond their control, or because they are not applicable/cannot be installed.

36% **OF HOUSEHOLDS ARE PLANNING TO MAKE AT LEAST ONE ENERGY EFFICIENCY IMPROVEMENT IN THE NEXT TWO TO THREE YEARS**

Those living in Innse Gall (45%), households with children (42%), and households with an income of £26,000+ before tax (45%) are more likely to be planning such improvements. Those less likely to be planning improvements include those not in work (25%) and those in the most deprived areas (25%).

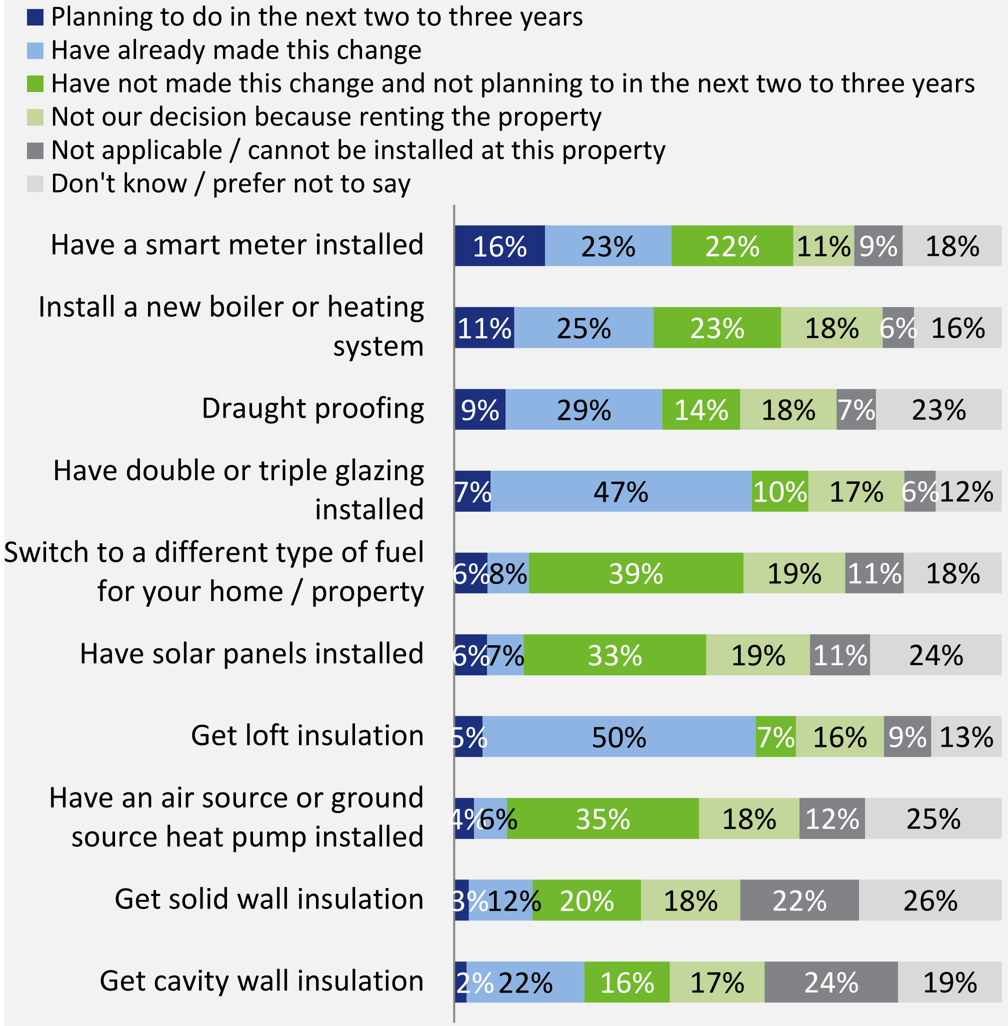
Those living in a house with a working croft are more likely to be planning to get loft insulation (10%) and cavity wall insulation (7%).

Certain groups are more likely to have already made home energy efficiency improvements:

- Older residents (aged 65+)
- Households earning £52,000 or above annually
- Those living in accessible or remote rural areas.

However, residents in urban areas are more likely to have installed a smart meter (30% compared to 23% overall) or a new boiler or heating system (28% compared to 25% overall).

Q. Which of the following, if any, are you planning to do in the next two to three years?



Base: All households (4,442); fieldwork = 28 January - 25 March 2022

TOWARDS NET ZERO – BARRIERS TO SWITCHING FUEL TYPE

Only 6% of households are planning to switch fuel type over the next two to three years. Of the households who are not planning to switch fuel type, over half say financial cost is a main reason for not making the switch. Around one in three don't want to change the type of fuel they use and a similar proportion say not enough financial support is available from government for them to make the switch. There is scope for awareness-raising and better information provision on this topic, since around 1 in 8 households are not sure how to go about changing fuel type or feel they need more information.

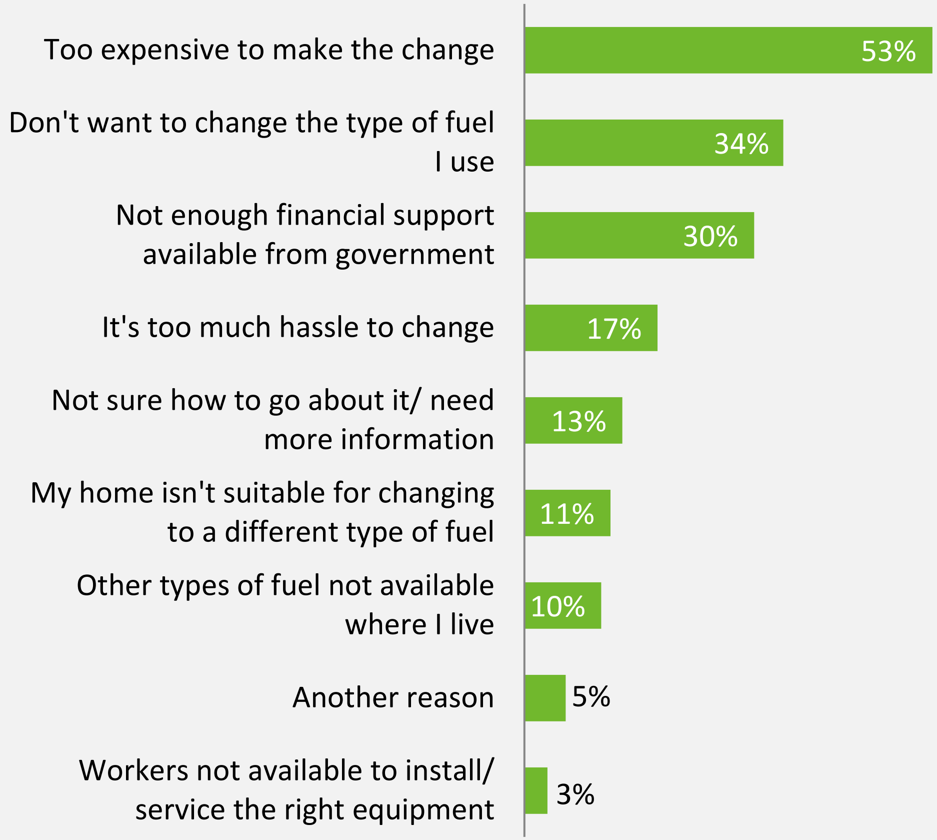
Households most likely to switch fuel type in the next two to three years:

- Households with 3+ adults with children (11%)
- Remote rural households (9%)
- Households with an income of over £52,000+ before tax (9%)
- Those who say their house is difficult (10%) or expensive (8%) to heat.

More than half of households currently using oil (51%) are not planning to switch in the next two to three years. They are more likely than average to say that it is too expensive to make the change (57%) and there is not enough financial support from government to switch (35%).

Households currently using non-mains gas and coal are also more likely to say cost is a main reason for not switching (53% vs 66% and 65% respectively).

Q. What is the main reason or reasons why you are unlikely to change the type of fuel you use in your home/property in the next two to three years?



Base: Households who are not planning to switch fuel type (1,929); fieldwork = 28 January - 25 March 2022

TOWARDS NET ZERO – ELECTRIC/HYBRID CARS

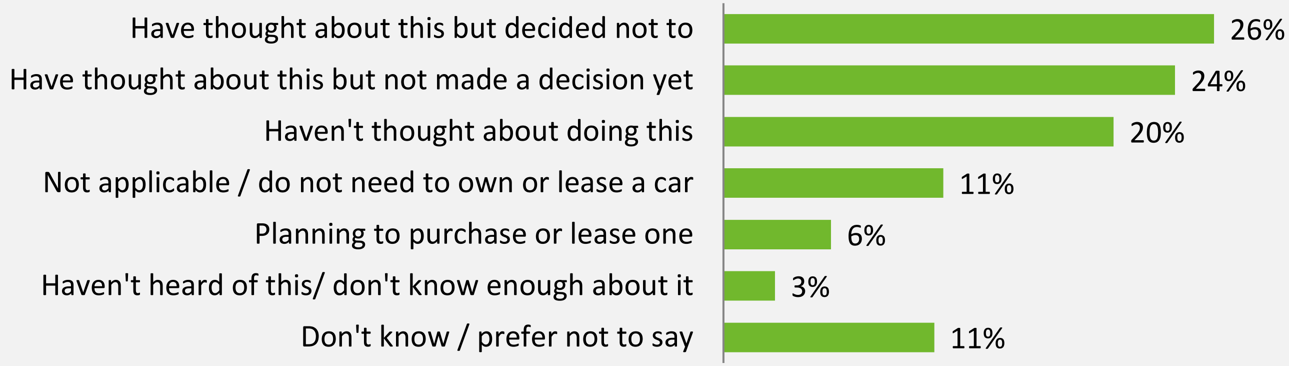
Around 1 in 15 households have purchased or leased an electric/hybrid car. Of those who have not done this, a quarter have thought about an electric/hybrid car and decided against it, while another quarter have not made a decision yet. Cost, range and availability of public charging points are key concerns that need addressing when it comes to electric or hybrid cars.

7% purchased/leased electric/hybrid car

90% not electric/hybrid

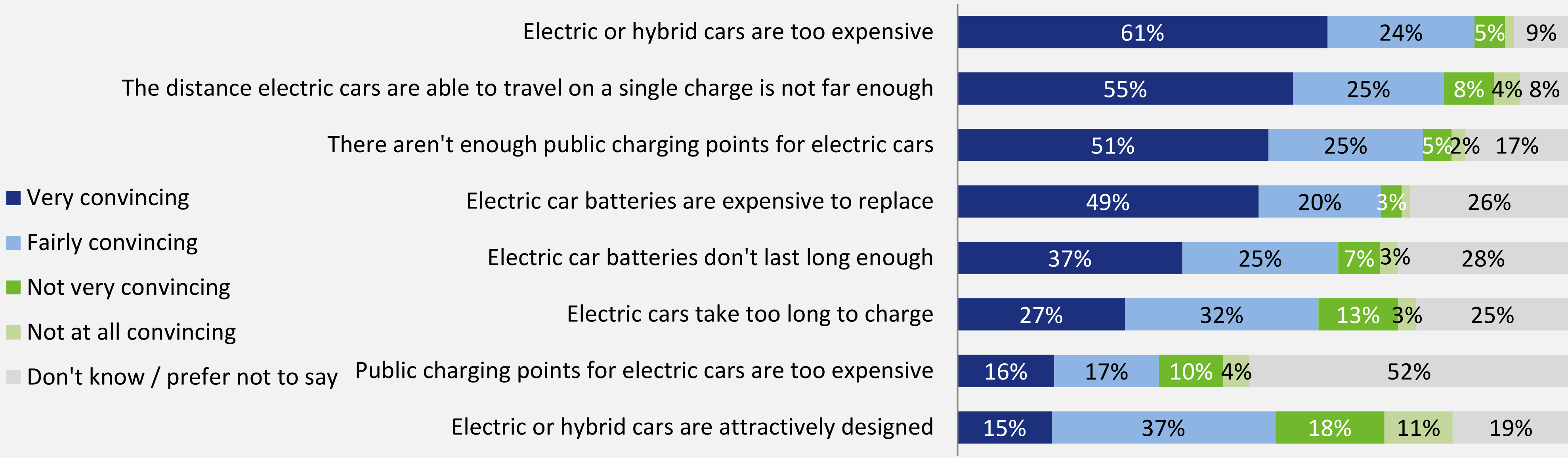
The use of electric/hybrid cars in urban areas is lower (5%) compared to accessible rural (10%) and remote rural (8%) areas. Generally, the highest earners were more likely to have considered doing so.

Q. Which of the following best applies to your household's current thinking about owning/leasing a hybrid/ electric car?



Base: Households who have not purchased/leased an EV/hybrid (4,129); fieldwork = 28 January - 25 March 2022

Q. How convincing, or otherwise, do you personally find each of the following statements about electric or hybrid cars?



Base: All who have at least thought about purchasing/leasing an EV/hybrid (2,520); fieldwork = 28 January - 25 March 2022

TOWARDS NET ZERO – REDUCING CARBON EMISSIONS AT WORK

Two in five residents in work expect the need to reduce carbon emissions will not change their job at all. A quarter think these changes could quite easily be made, while nearly one in five residents feel it would be difficult for their job to adapt. The most commonly expected impacts of the changes for them personally are to be able to work with new technology and the need to invest in new tools or equipment.

19% THINK IT WOULD BE DIFFICULT FOR THEIR JOB TO ADAPT TO THE CHANGES NEEDED TO REACH NET ZERO

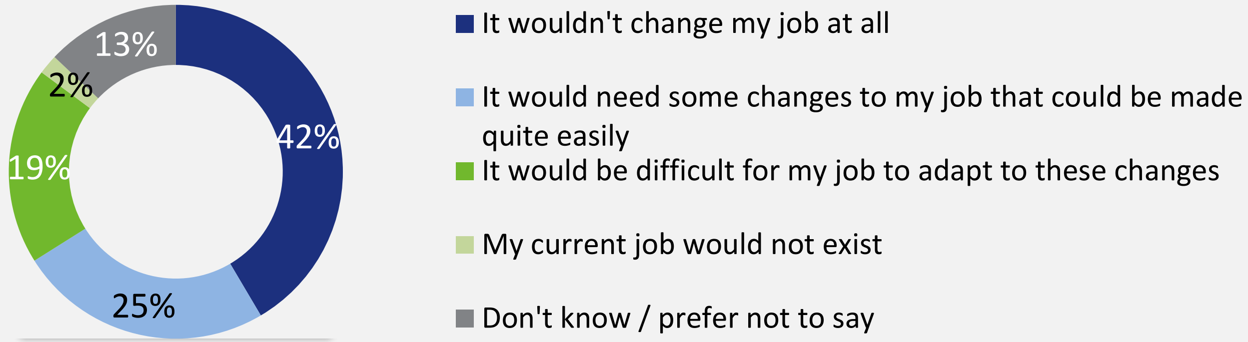
Those who are more likely to say it would be difficult to adapt:

- Men than women (23%, vs. 16%)
- Those with children in their household (23%)
- People working in transport (47%), fisheries (41%) and health/social care (26%)
- Those in energy/utilities were more likely to say their job would not exist (18%), and that they would need to move away from their local area to work (17%) or retrain (27%).

Variation in what changes would mean (those more likely to cite each):

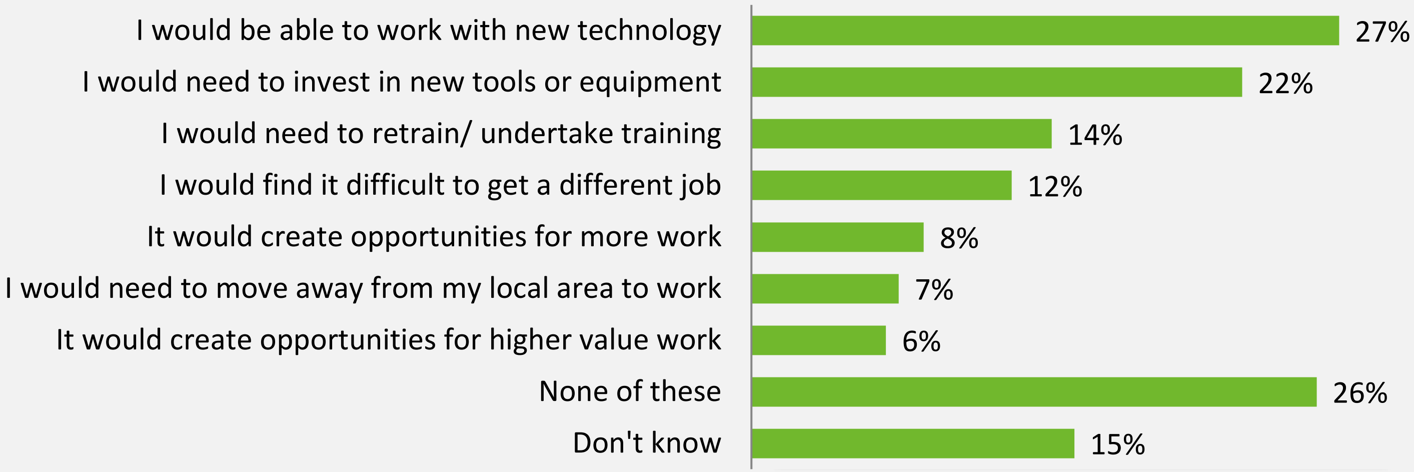
- *Create opportunities for more work* - those working in environment/agriculture (21%)
- *Need to invest in new tools/equipment* - self-employed (55%), those working in the private sector (32%) or environment/agriculture (40%)
- *Able to work with new technology* - those in the region's least deprived areas (40%), *young* people aged 16-29 (39%), men (33%).
- *Need to retrain* - those on the lowest incomes (25%).

Q. In the future it is likely that the need to reduce carbon emissions will mean that many jobs will change. To what extent, if at all, could your job adapt to these changes?



Base: All in work (2,420); fieldwork = 28 January - 25 March 2022

Q. What would these changes mean for you personally?



Base: All whose job would need to adapt to reduce carbon emissions (1,080); fieldwork = 28 January - 25 March 2022

TOWARDS NET ZERO – DISCUSSION GROUP FINDINGS (1)

Local changes towards net zero

Changes that discussion group participants had noticed in their local area included:

- increased use/ownership of **electric vehicles** (EV) (cars and buses)
- availability of **EV charging points**
- construction of **wind farms**
- increased **use of plastic replacements or recyclable plastics** in shops or businesses
- improved **recycling facilities**.

Participants also mentioned the increased use of **solar panels and air/ground source heat pumps**, particularly in new buildings.

Personal lifestyle changes

Changes people had made personally included purchasing an **electric vehicle** or **improvements to make their home more energy efficient**, such as installing double or triple glazed windows, upgrades to heating systems (such as a new boiler) or improved insulation. There were also examples of participants who were consciously trying to reduce their use of plastics and the amount of plastic waste.

However, the **primary motivations behind these and any future changes tended to be financial** (e.g. to save money), rather than environmental. This is consistent with other recent research into low carbon behaviours in Scotland[1], which found that factors such as convenience and cost were more important than environmental considerations in driving positive net zero behaviour change during the Covid-19 pandemic.

[1] Net zero behaviours in the recovery from COVID-19 (climatexchange.org.uk)

TOWARDS NET ZERO – DISCUSSION GROUP FINDINGS (2)

Barriers to achieving net zero locally

While participants were generally in favour of the Scottish Government's net zero target, they also noted barriers to achieving this in their local area. These included:

- local **resistance to the construction of new windfarms**
- a lack of reliable **EV charging points**
- **limited public transport** routes
- a lack of **suitably skilled / approved installers of green technology**
- a lack of accessible **recycling centres**
- limitations to the extent of **changes that can be made to older / listed buildings** to improve energy efficiency
- **resistance among landlords** to improve the energy efficiency of their properties
- a **lack of knowledge** among people on the effectiveness and benefits of net zero changes.

Cost was cited as **a central barrier to improving the energy efficiency of participants' homes** (such as the cost of installing solar panels or heat pumps). They also thought that it could be some time before they saw any financial benefits from these upgrades.

> I looked into getting heat exchangers on my roof. But it would have taken almost 30 years before it became financially beneficial and I might not be around then! It's the same with ground source heat pumps.
> **Potential Entrepreneur, Accessible/Urban**

In addition to the cost of the vehicles themselves, participants noted their **reservations about purchasing an electric vehicle**, particularly those living in remote rural areas. Important here were concerns about the vehicles' **range** and the **feasibility and cost of installing charging points** at their property.

For participants on lower incomes, buying an electric vehicle or upgrading their home heating was not something they felt they could conceivably consider at present, particularly due to rises in the cost of living.

> I've no idea how the government think we're going to get rid of our cars and go electric when we can't even feed ourselves.
> **Potential Entrepreneur, Remote rural**

One participant also highlighted that the cost of living crisis meant that people in her local area were reverting to less environmentally friendly but cheaper methods of heating their home, including cutting peat to use on their open fires / solid fuel stoves.

TOWARDS NET ZERO – DISCUSSION GROUP FINDINGS (3)

Opportunities from net zero

Participants' suggestions for encouraging the transition towards net zero living among people in their local area included more widely available and accessible **EV charging points and recycling centres**, and **improved government grants or subsidies** to help people upgrade the energy efficiency of the homes.

Participants also felt that more compelling **information and evidence on the environmental impact and benefits of net zero changes** a household can make may encourage people to adopt these in the future.

Green jobs

In general, while participants were uncertain if the move to net zero would affect their current job, they had **noticed examples of their workplace adopting more sustainable practices**, such as the use of EVs, improved recycling practices and a reduction in the use of plastics.

While it was noted there were some opportunities for green jobs in their local area, largely in the energy sector (e.g. wind farms, hydroelectric power, climate hubs), participants had not considered moving to a green job (with the exception of one participant who was planning to start their own electric vehicle repair business). They noted that, while they were largely in favour of green jobs, if they were to change jobs themselves, the **financial benefits of doing so would be more important than any environmental motivations**.

6. FUTURE ASPIRATIONS

SUMMARY

- **More than half of Highlands and Islands residents (52%) feel optimistic about the community they live in, while just 16% are pessimistic.** Certain groups are more likely to feel optimistic about their community, including: retired people, higher earners (£26,000+), those living in Orkney and newer residents (people who have been in the region for up to 1 year).

- **The top priorities for communities in the region to thrive are: housing for local families, more job opportunities, and local businesses and trades.** Certain economic opportunities are more likely to be a top priority for men, people on lower incomes, young people and those who plan to stay in the region for up to a year.

- **While top priorities are fairly consistent across areas within the region an urban/rural split is apparent** with job opportunities, jobs that pay better and social activities more of a priority in towns. In contrast, housing, broadband, more working age people moving to the area and transport connections are felt to be more important in rural areas.

OPTIMISM

More than half of Highlands and Islands residents (52%) feel optimistic about the community they live in, while just 16% are pessimistic.

Groups more likely to feel optimistic about their community:

- Newer residents (lived in the region for up to a year) (69%)
- Those living in Orkney (69%)
- Those with household incomes of £26,000 to £51,999 or £52,000+ (both 58%)
- Those in remote rural areas (56%)
- Retired people (56%).

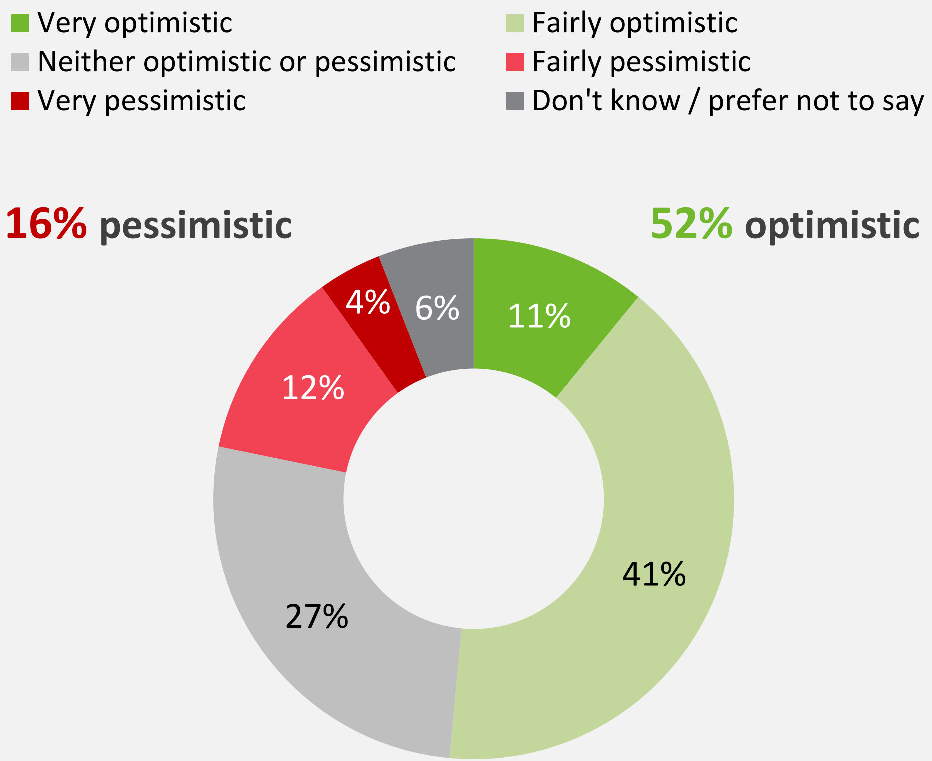
Those more likely to feel pessimistic about their community:

- Young people aged 16-29 (26%)
- Single-adult and children households (27%), and larger households with 3 or more adults and children (24%)
- Those who are not working (21%)
- Those with a disability or limiting health condition (20%).

Feelings of community pessimism are also higher among people living in Caithness and Sutherland (23%), Argyll and the Islands (20% pessimistic), and in towns (18%).

Levels of optimism are comparable with those found in a 1999 survey report prepared for HIE, which showed that 53% of people living in the region were optimistic about their community. Similarly, young people felt less optimistic about their community than older people did.[1]

Q. How would you describe your overall level of confidence or feelings of optimism about the community you live in?



Base: all residents, aged 16+ (5,301); fieldwork = 28 January - 25 March 2022

NOTES

Highlands and Islands Community Confidence, System Three for Highlands and Islands Enterprise, 1999. The comparison is indicative only as a different survey method and answer scale were used in the 1999 study.

PRIORITIES (1)

The top priorities for communities in the region to thrive are: housing for local families, more job opportunities, and local businesses and trades.

In addition to the top ten factors shown in the chart, 12% of respondents cited having shops within 20 minutes of their home as a priority, 11% improved mobile phone network coverage, 7% better childcare provision, 6% more skilled work and 6% spaces for community activities.

There are demographic differences in priorities. Economic opportunities are more likely to be a priority for certain groups:

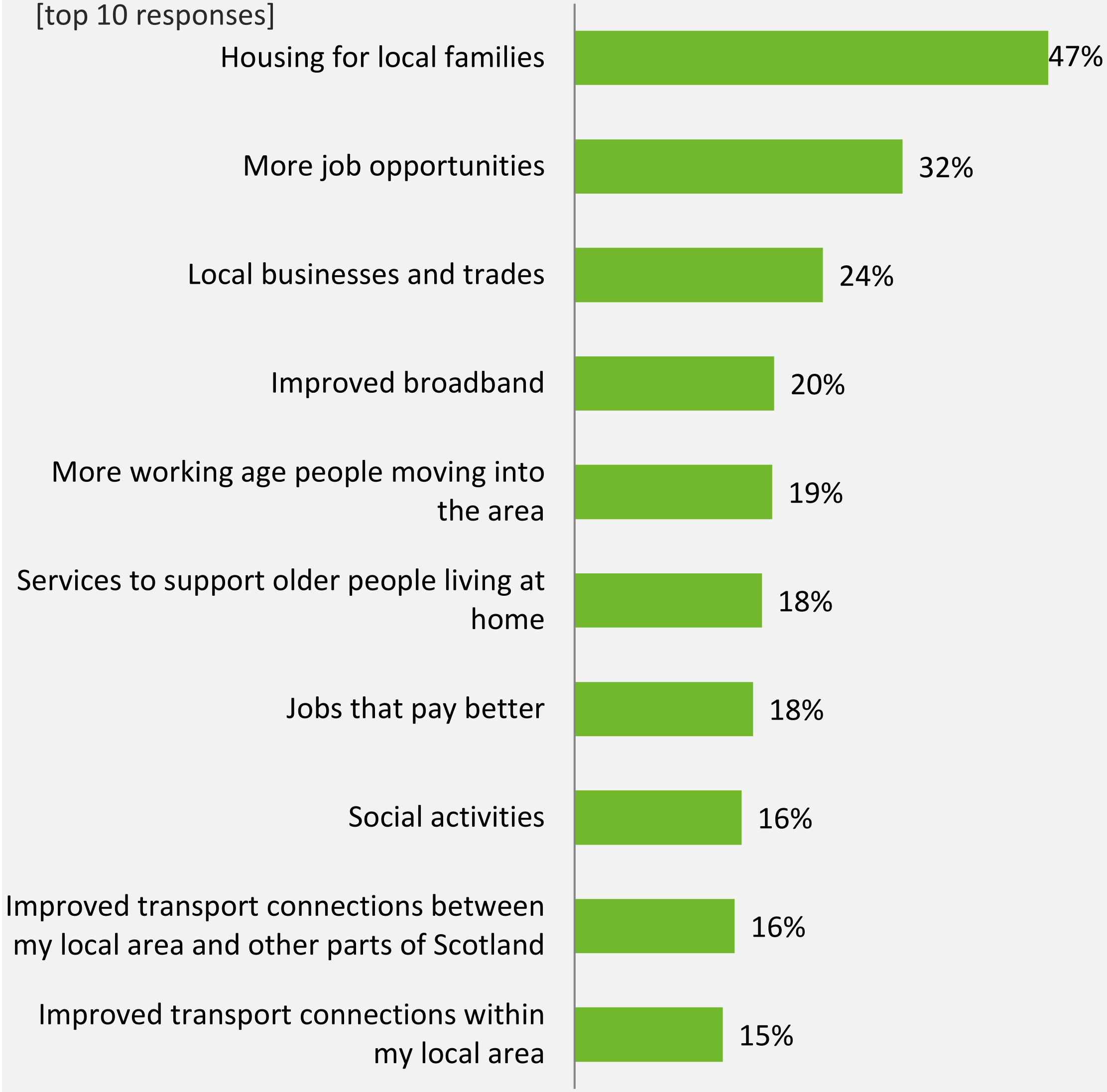
- Men – more job opportunities (35%)
- People on lower incomes (household income £15,599 or less) - more job opportunities (39%)
- Young people (aged 16 to 29) – jobs that pay better (30%)
- Older people (aged 65+) – more working age people moving into the area (23%)
- People who plan to stay in the region for up to 1 year - jobs that pay better (35%).

In terms of infrastructure, **students and apprentices are more likely to say improved transport connections within their area are a top priority** (26%). **Broadband is more likely to be a priority for people with higher household incomes** of £52,000 or more (26%).

Meanwhile **women and those who are not working are more likely to prioritise social activities** (19% and 22%).

Those aged 65+ are more likely to prioritise services to support older people living at home (29%).

Q. Which of these, if any, does your community need to thrive in the future? [top 10 responses]



Base: all residents, aged 16+ (5,301); fieldwork = 28 January - 25 March 2022

PRIORITIES (2)

The top three priorities are fairly consistent across the region. However people in Innse Gall, Lochaber Skye and Wester Ross and in Argyll and the Islands are more likely to prioritise more working age people moving to the area. Residents in Orkney and Shetland are more likely to prioritise improved broadband.

While not a top priority, people in Argyll and the Islands, the Inner Moray Firth and Shetland were more likely to highlight the importance of transport connections.

There is an urban/rural split with people in towns more likely to prioritise:

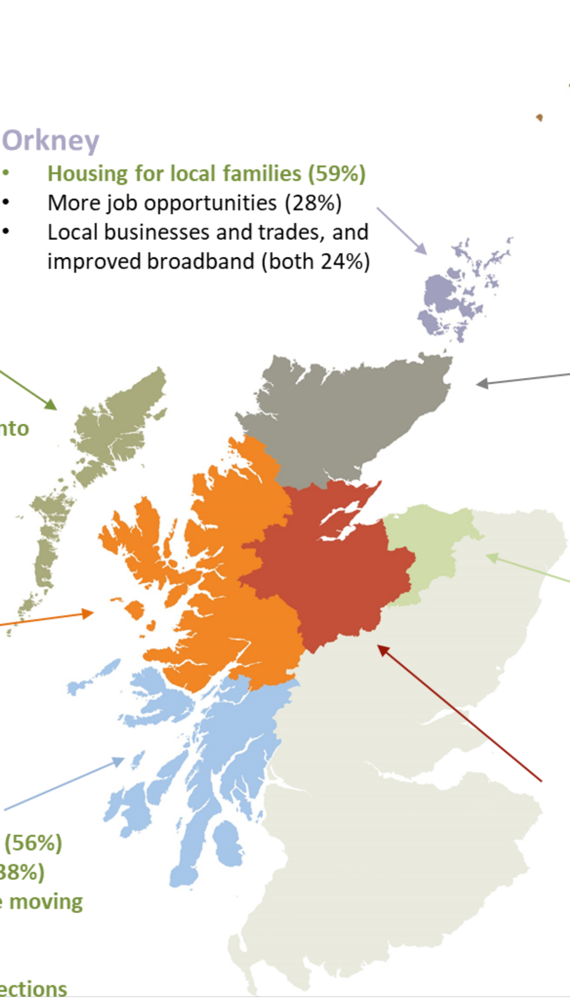
- More job opportunities (37%)
- Jobs that pay better (22%)
- Social activities (19%).

In contrast, people living in remote rural areas are more likely to prioritise:

- Housing for local families (54%)
- More working age people moving to the area (27%)
- Improved broadband (24%).

People living in accessible rural areas are more likely to prioritise:

- Improved broadband (29%)
- Improved transport within the area (24%).



Shetland
- **Housing for local families (55%)**
- **Improved broadband (31%)**
- More job opportunities (23%)

More likely to mention:
- **Improved transport connections with other parts of Scotland (22%)**

Orkney
- **Housing for local families (59%)**
- More job opportunities (28%)
- Local businesses and trades, and improved broadband (both 24%)

Innse Gall
- **Housing for local families (54%)**
- More job opportunities (38%)
- **More working age people moving into the area (33%)**

Caithness and Sutherland
- **More job opportunities (46%)**
- Housing for local families (35%)
- Local businesses and trades (27%)

More likely to mention:
- **More working age people moving into the area (25%)**

Lochaber, Skye and Wester Ross
- **Housing for local families (66%)**
- More job opportunities (32%)
- **More working age people moving into the area (25%)**

Moray
- Housing for local families (32%)
- More job opportunities (33%)
- **Local businesses and trades (30%)**

Argyll and the Islands
- **Housing for local families (56%)**
- **More job opportunities (38%)**
- **More working age people moving into the area (32%)**

More likely to mention:
- **Improved transport connections with other parts of Scotland (21%)**

Inner Moray Firth
- Housing for local families (45%)
- More job opportunities (27%)
- Local businesses and trades (24%)

More likely to mention:
- **Services to support older people living at home (22%)**
- **Social activities (19%)**
- **Improved transport connections within the local area (19%)**

NOTES

Figures in green on the map are significantly higher than the regional average.

Base: all residents, aged 16+ (5,301); fieldwork = 28 January - 25 March 2022

7. TECHNICAL NOTE

PUSH-TO-WEB SURVEY METHODOLOGY

Sampling

In total 18,087 households were invited to take part in the survey. These were randomly selected from the Royal Mail's Postcode Address File (PAF) from among all households based in the eight HIE regional office areas. Households were disproportionately sampled in Caithness and Sutherland, Innse Gall, Orkney and Shetland, to allow for a large enough sample size in these areas to carry out subgroup analysis.

Method

The survey was carried out using a push-to-web methodology. Residents were able to complete the survey online or using a paper questionnaire. Each address on the sample was sent up to three letters, inviting them to take part in the survey:

- The first letter invited participants to take part in an online survey, using a supplied website link and two unique access codes. Up to two members of the household were invited to take part in the online survey.
- Two weeks later a reminder postcard , containing the online survey link and access code, was sent to those households yet to respond.
- In another two weeks a final letter was sent to those households yet to respond which, along with the invite to the online survey, also contained one copy of a paper version of the survey and a postage paid return envelope.

All residents who completed the survey were offered a £5 shopping voucher to thank them for their time.

Fieldwork

The survey fieldwork was conducted between 28 January and 25 March 2022. In total 5,301 eligible interviews were achieved from 4,442 households (3,322 online and 1,979 postal surveys) – an address level response rate of 25%.

Weighting was applied to correct the distribution of the sample to more closely match the overall Highlands and Islands population. The data was weighted by age, gender, working status, number of adults in household, tenure and area of the region using National Records of Scotland Mid-2020 Population Estimates and Scottish Household Survey 2019 data.

METHODOLOGY – WEIGHTED PROFILE OF SURVEY PARTICIPANTS

Household size

Adults	%	wt %
1	29.7%	24.6%
2	52.8%	53.3%
3	9.1%	10.3%
4+	3.8%	5.5%

Age

	%	wt %
16-24	2.4%	6.0%
25-34	5.8%	11.5%
35-54	24.0%	31.7%
55-69	37.9%	27.9%
70+	28.9%	21.6%

Gender

	%	wt %
Male	42.5%	47.0%
Female	55.5%	50.7%
Other / prefer not to say	2.1%	2.3%

Working status

	%	wt %
Self-employed	8.8%	10.6%
Employed full time	25.9%	34.3%
Employed part time	11.0%	11.5%
Looking after the family or home	2.3%	4.1%
Retired	39.7%	30.2%
Unable to work because of sickness or disability	3.6%	2.2%
Other	7.3%	2.4%

Location

	%	wt %
Argyll and the Islands	13.0%	12.8%
Caithness and Sutherland	8.6%	8.2%
Innse Gall	6.8%	7.0%
Inner Moray Firth	32.4%	31.0%
Lochaber, Skye and Wester Ross	7.9%	7.6%
Moray	16.4%	16.2%
Orkney	7.9%	8.0%
Shetland	6.9%	6.8%

Tenure

	%	wt %
Own outright/own with mortgage	77.3%	69.8%
Rent from a private landlord	7.1%	10.2%
Rent from a local authority/housing association	9.8%	15.8%
Other	3.4%	1.4%

GROUP DISCUSSION METHODOLOGY

Sampling

Individuals who had completed the survey and agreed to be recontacted were invited to take part in group discussions covering some of the survey topics in more depth. Recruitment for the groups was carried out by Ipsos and individuals were invited to take part based on the following criteria:

- Location: 18 participants living in remote rural areas (with at least 9 living on an island) and 18 participants living in accessible rural or urban areas (based on the Scottish Government Urban Rural Classification)
- Age: at least 12 16-34 year olds and at least 12 35-54 year olds
- Work aspiration: 12 participants who were interested in becoming self-employed in the next five years (based on survey responses).

Quotas were also set on gender, location and income level.

Method

There were six group discussions with the following participants:

1. Potential entrepreneurs living in remote rural areas
2. Potential entrepreneurs living in accessible rural or urban areas
3. 16-34 year olds living in remote rural areas
4. 35-54 year olds living in remote rural areas
5. 16-34 year olds living in accessible rural or urban areas
6. 35-54 year olds living in accessible rural or urban areas

The group discussions and in-depth interview were carried out on Zoom. Discussions were audio recorded (with permission from participants) for subsequent analysis.

In each group, the discussions covered three main topics:

- Cost of living
- Entrepreneurship (for potential entrepreneurs only)
- Training and Employment opportunities (for groups without potential entrepreneurs)
- Net zero

Discussions were facilitated by the Ipsos research team.

Fieldwork

The group discussions were conducted between 14 June and 23 June 2022. In total there were 34 participants (including one in-depth interview with a participant who was unable to attend a discussion group). Between four and six participants attended each group.

Participants received £40 (cash or voucher) to thank them for taking part in a group discussion or £30 for taking part in an in-depth interview.

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Ipsos

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