

MY LIFE IN THE HIGHLANDS AND ISLANDS RESEARCH

Innse Gall

Summary report

October 2022



EXECUTIVE SUMMARY – INNSE GALL

This report presents the findings of a large-scale survey conducted by Ipsos on behalf of Highlands and Islands Enterprise (HIE) between 28th January and 25th March 2022. In total, 5,301 adults aged 16+ living in the Highlands and Islands responded to the survey, including 361 in Innse Gall.

Connectivity and access to services

Around six in ten households in Innse Gall can access a primary school (60%), convenience store (60%) and post/mobile post office (59%) in their local area, although this is lower than the region overall. They are also less likely than average to be able to access a secondary school, supermarket or residential care – around one in three cannot access them within a 20-minute drive. In addition, 35% cannot access a cottage/community hospital within a 20-minute drive and around two in ten cannot access a recycling centre (23%) or bank/mobile bank (19%) within this distance.

Excluding those who don't know whether the service is available locally, households in Innse Gall are more likely than regionally to say they are unable to access a dentist (24% vs 15%) or home care services (10% vs 6%) within a 20-minute drive or online.

In line with the region overall, around a fifth of households (17%) would find it difficult to stream a TV show or film without buffering.

Housing

While most households in Innse Gall feel their own housing situation meets their needs, they are more likely than average to perceive local housing. Higher proportions than regionally reported a shortage of housing (85%), that the right types of housing aren't available for local people (82%) and local people can't afford housing (80%). They are also more likely to feel that too many houses are bought as second or holiday homes (77%) or used for short-term rents (74%), and that there are empty houses that could be brought back into use (74%).

Employment and training

As with regionally, 13% of those in work in Innse Gall have more than one job. 20% are self-employed (19% regionally) and a further 16% would like to start their own business (12% for the region overall). Of those who have not accessed training in Innse Gall, 29% say they would find it difficult to do so in person (30% overall). A higher proportion than average cite their course of interest not being available as a barrier (34% vs 20% regionally).

The Impact of COVID-19 and transport

The pandemic has impacted on access to goods and services, with most households in Innse Gall (91%) saying that goods and services are now more expensive. They are also more likely than average to say it is now harder to get hold of the goods they need.

Innse Gall residents are more likely than regionally to rely on ferry (76%) and air (52%) services. Levels of dissatisfaction with the reliability and frequency of ferry services are also higher, and most (90%) feel that an increased numbers of tourists has made it hard for local people to access ferry or air services.

Participation, pride and local decision making

Three fifths (59%) of residents take part in local activities (55% regionally), including attending local community events, membership of local groups or sports clubs or volunteering for a charity, social enterprise or community group.

95% of residents express pride in their local community (88% regionally), but they are split about the extent to which they can influence local decision-making.

Towards net zero

Households in Innse Gall are more likely than average to be planning energy efficiency improvements in the next two to three years (45% vs 36% regionally). The most commonly planned actions are installing a smart meter (21%), new boiler/heating system (15%) and/or draught proofing (12%).

A third (35%) of those in work in Innse Gall believe their job will be affected by the move towards net zero, which is lower than regionally (46%).

Priorities for communities to thrive

Around half (51%) of Innse Gall residents are optimistic about their communities, and a higher proportion than regionally say they don't intend ever to move away from their local area (57% vs 50%). They cite the top priorities for their communities to thrive as: housing for local families (54%), more job opportunities (38%) and more working age people moving into the area (33%). Local housing and an increased working age population are higher priorities for communities in Innse Gall than regionally.

ACCESS TO FACILITIES AND SERVICES (1)

Most households in Inne Gall have a daytime bus service (79%) available within a 15-20 minute walk of home, while around six in ten have access to a hall/function room (61%), a primary school (60%), a convenience store (60%) and a post office (59%) within this distance. However, other key services and facilities are less accessible. Only around one in three households can access a supermarket (32%), secondary school (31%), cottage/community hospital (28%), or recycling centre (27%) within their local area.

17% OF HOUSEHOLDS SAY IT IS DIFFICULT TO STREAM A TV PROGRAMME OR FILM compared to 21% for the region overall

31% OF HOUSEHOLDS SAY IT IS DIFFICULT TO TAKE OUT MONEY FROM A CASH MACHINE compared to 28% for the region overall

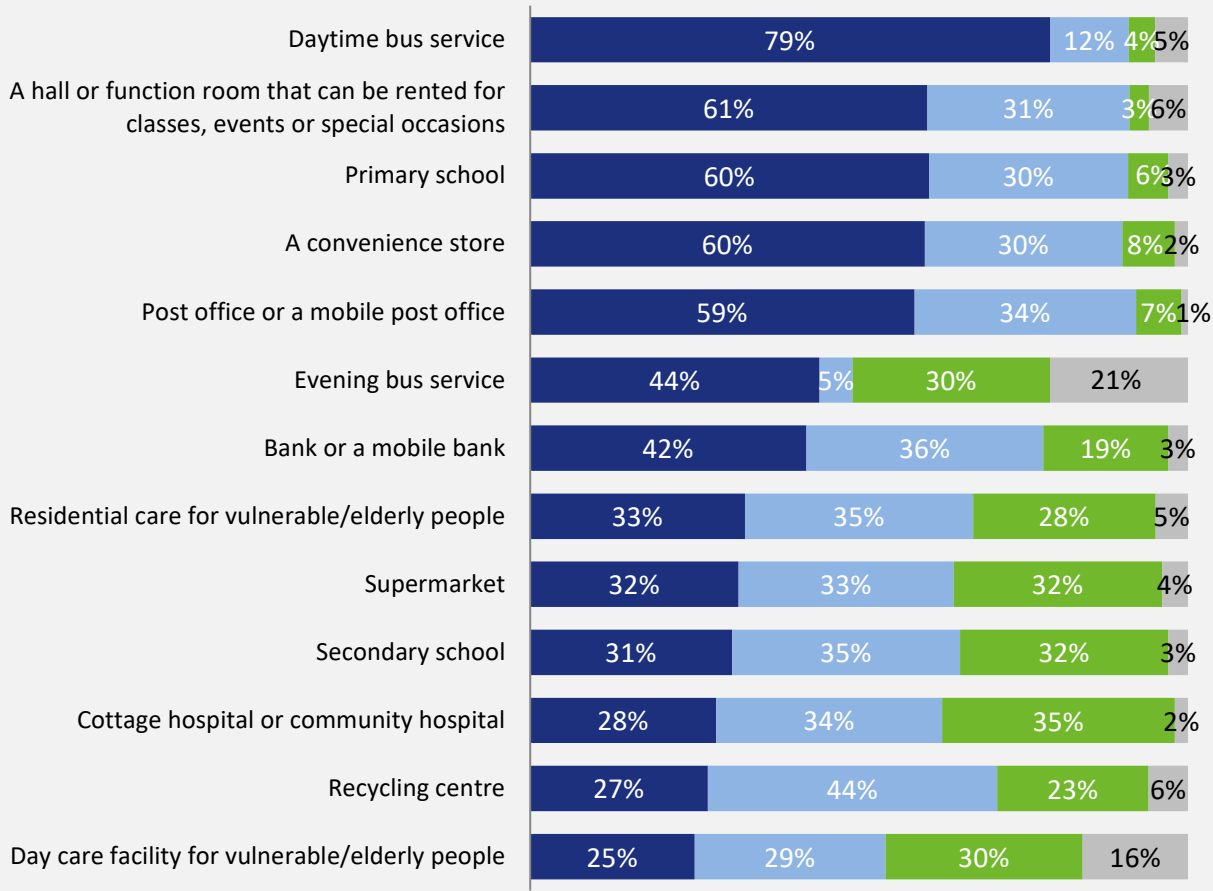
81% OF HOUSEHOLDS SAY IT IS DIFFICULT TO HAVE A TAKEAWAY DELIVERED higher than the region overall (44%)

Households in Inne Gall are less likely to say they are able to access certain services within their local area compared to the Highlands and Islands overall, including:

- a **primary school** (60% vs 77%)
- a **secondary school** (31% vs 51%)
- a **convenience store** (60% vs 74%)
- a **supermarket** (32% vs 47%)
- a **post/mobile post office** (59% vs 68%)
- **residential care** (33% vs 43%)
- a **hall/function room** that can be rented (61% vs 70%)
- a **recycling centre** (27% vs 41%).

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.

- Available in my local area
- Available within a 20-minute drive of my local area
- Not available within a 20-minute drive of my local area
- Don't know



Base: All households in Inne Gall (317); fieldwork = 28 January – 25 March 2022

ACCESS TO FACILITIES AND SERVICES (2)

A majority of households in Innse Gall have access to a GP (82%) permanently located within a 20-minute drive of their local area, while more than six in ten can access a permanent or visiting dentist (65%), midwife or health visitor (63%) and home care services (62%) within a 20-minute drive, and 57% can access a physiotherapist. 52% say they can access mental health services either in person or online, although one in three do not know of their availability.

Excluding those who don't know whether the service is available locally, households in Innse Gall are more likely than those across the region overall to say they are unable to access a **dentist (24% vs 15%)** and **home care services (10% vs 6%)**, within a 20-minute drive or online.

Levels of those unable to access the other services is not significantly different to the region overall – **mental health services (25% vs 20%)**, **physiotherapist (15% vs 11%)**, **midwife or health visitor (5% vs 5%)** and **GP (4% vs 3%)**.

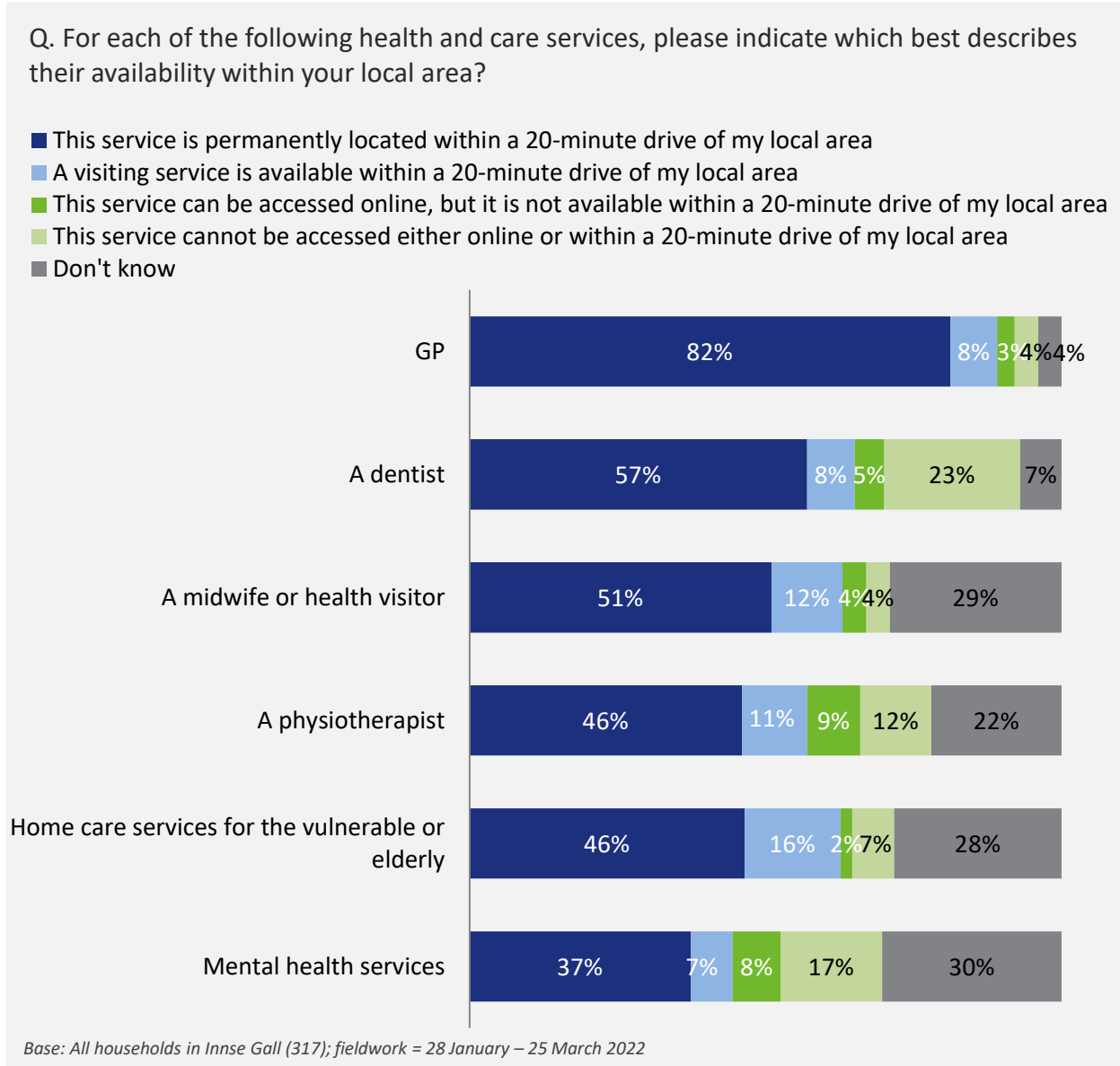
Reliance on and satisfaction with transport services

Looking at transport, **most households own at least one vehicle (88%)**, and 47% own two or more cars (87% and 44% regionally). In Innse Gall, people are more likely than average to own three or more cars, relative to the region overall (15% vs 10%).

- 87% rely on a car or van, in line with the region overall at 87%
- 76% rely on ferries, higher than in the region overall at 23%
- 52% rely on air transport, higher than regionally at 17%
- 19% rely on buses, in line with the region overall at 20%.

Levels of dissatisfaction with ferry reliability (64% dissatisfied) and frequency (41%) are higher than in the region overall (34% and 26%). Two thirds (65%) are dissatisfied with the cost of air services, higher than the average of 41% for the Highlands and Islands as a whole.

On the other hand, people are more likely to be satisfied with the cost (56%) and reliability (65%) of bus travel in Innse Gall, compared to the region overall (44% and 52% respectively).



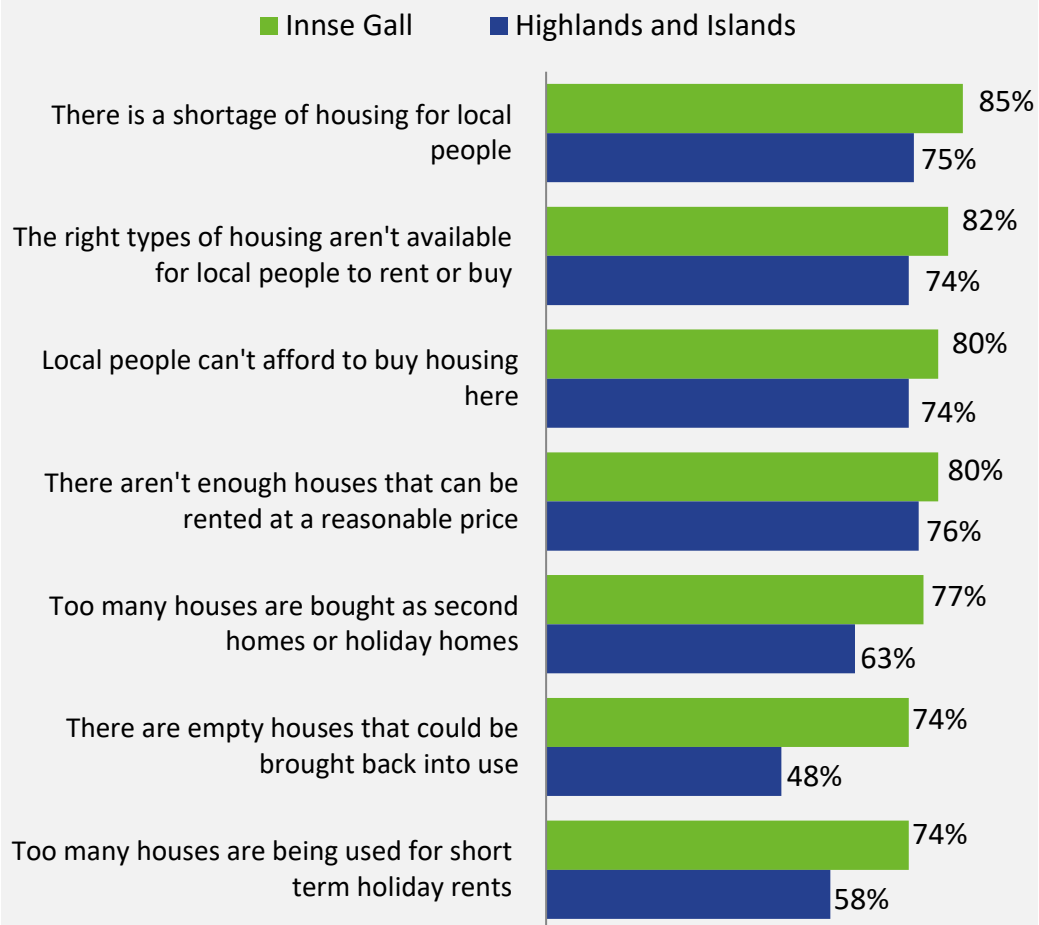
Note: Figures on access to health services (excluding those who don't know) were revised on 18 November 2022 following initial publication on 13 October 2022.

HOUSING SITUATION

The majority (92%) of households in Innse Gall say their housing situation meets their needs well (90% regionally). However, around half (53%) say their home is expensive to heat and 21% that it is difficult to heat. Households in the area are more likely than those in the region overall to report that there are empty houses that could be brought back into use, a shortage of housing, the right types of housing aren't available for local people, too many houses are used for short-term rents, locals can't afford housing, and too many houses are bought as second or holiday homes.

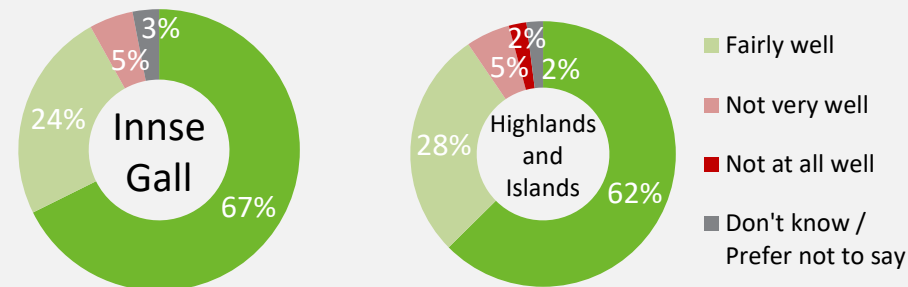
Q. To what extent does each of these describe the housing situation in your local area?

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



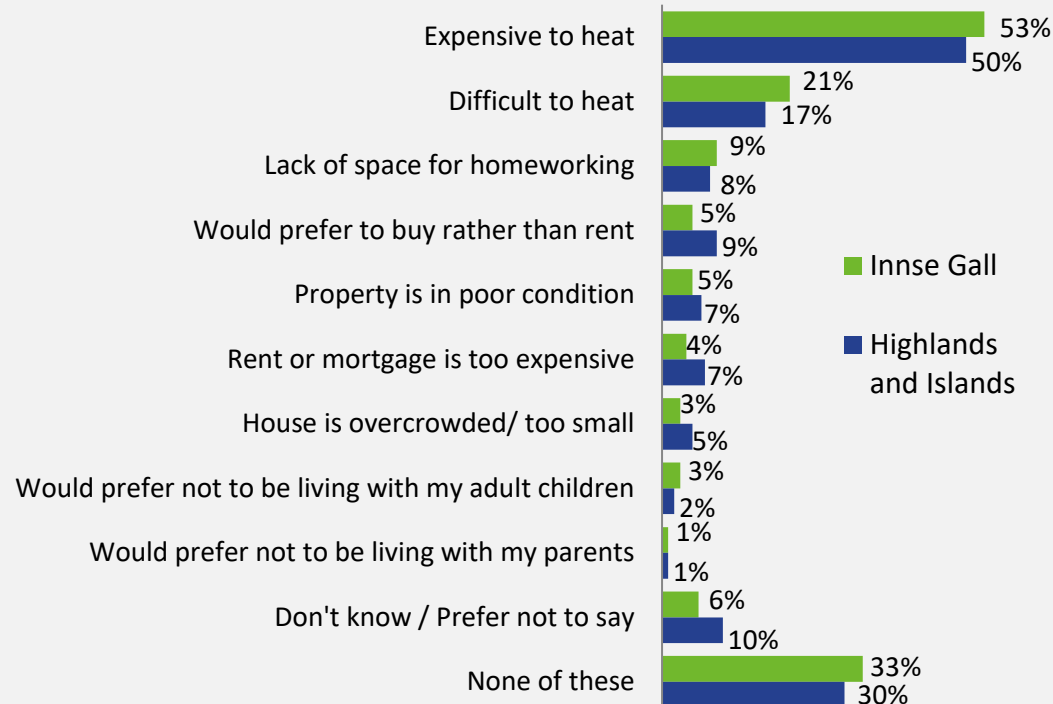
Base: All households in Innse Gall (317) and the Highlands and Islands (4,442); fieldwork = 28 January - 25 March 2022

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



Base: All households in Innse Gall (317) and the Highlands and Islands (4,442); fieldwork = 28 January - 25 March 2022

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



Base: All households in Innse Gall (317) and the Highlands and Islands (4,442); fieldwork = 28 January - 25 March 2022

EMPLOYMENT, ENTREPRENEURSHIP AND TRAINING

A fifth of those in work in Inne Gall are self-employed and 16% would like to start their own business. 71% of those in work say they are happy in their current job, in line with the region overall. Regarding future aspirations, fewer in Inne Gall say their job would be affected by the need to reduce carbon emissions compared to those in work in the Highlands and Islands overall.

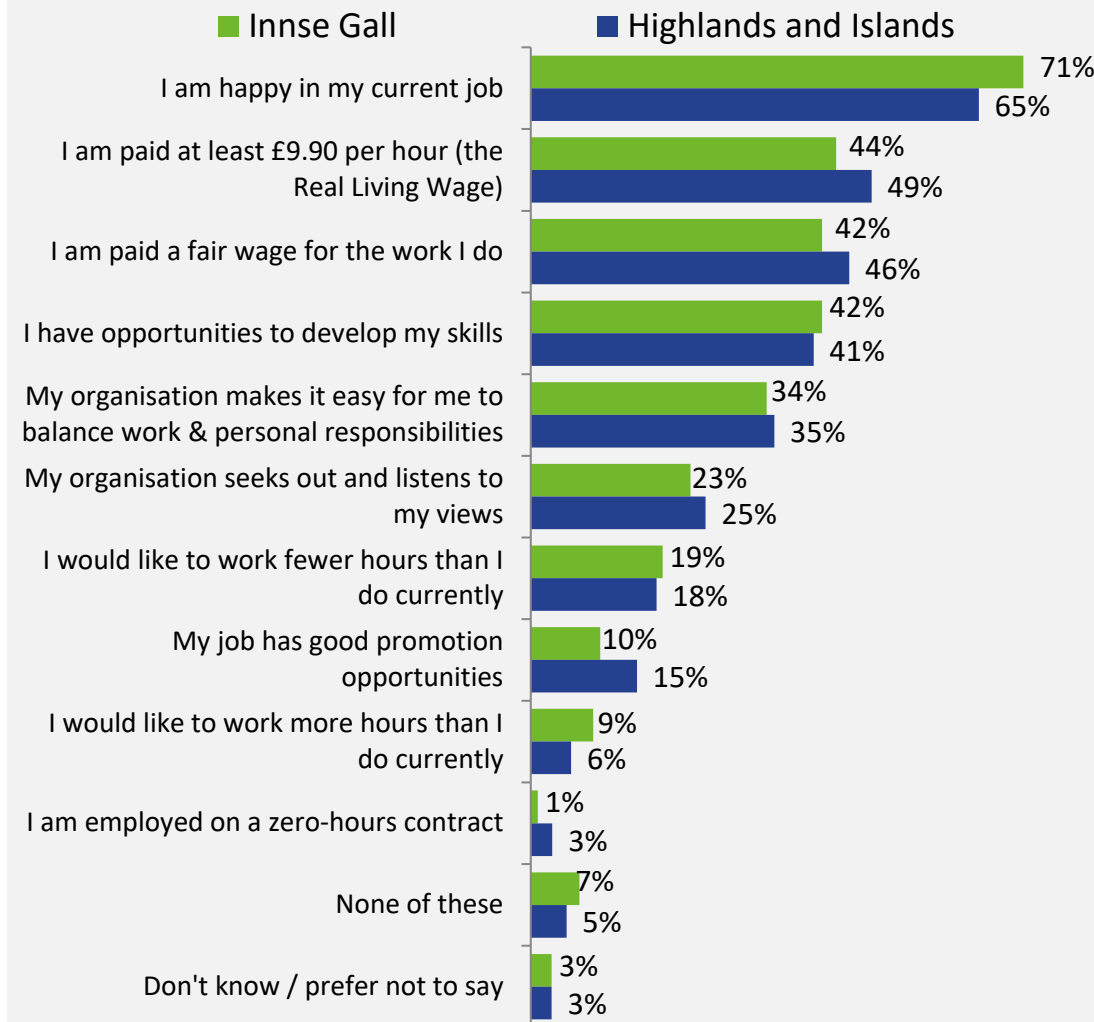
42% work in the private sector
(similar to the region overall at 49%)

46% work in the public sector
(similar to the region overall at 42%)

7% work for a charity/voluntary organisation
(in line with the region overall at 6%)

20% are self-employed
(similar to the region overall at 19%)

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



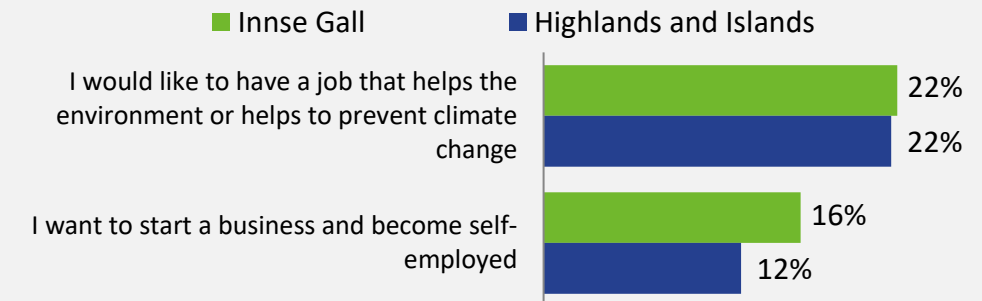
Base: all in work, aged 16+ in Inne Gall (171) and in the Highlands and Islands (2,240); fieldwork = 28 January - 25 March 2022

13% of those in work have more than one job, in line with the region overall at 13%.

13% of those aged 65+ are still in work, in line with the region overall at 13%.

Work aspirations are in line with the region overall.

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+ in Inne Gall (141) and the Highlands and Islands (2,031); fieldwork = 28 January - 25 March 2022

35% of those in work say that their job would be affected by the need to reduce carbon emissions, which is lower than in the region overall (46%).

29% of those who have not accessed training in Inne Gall say they would find it difficult to access courses or training in person, in line with the region overall (30%) and 7% find it difficult to do so online (9% regionally). The main barriers to accessing training are: the course of interest isn't available (34%)*, having to spend time away from home (28%), and the cost not being affordable (19%).

*this is higher than in the Highlands and Islands overall (20%)

IMPACT OF COVID-19 ON ACCESSING GOODS AND SERVICES

There is consensus among residents of Innse Gall that it is more expensive to buy goods and services now than it was pre-pandemic, with 91% saying this is the case in their local area, in line with the region overall. However, residents are more likely than regionally to say they find it more difficult to get hold of goods they need compared with pre-pandemic, and that increased numbers of tourists have made it hard for local people to access ferry or air services. More positively, residents in Innse Gall are less likely than average to say that businesses that closed because of lockdown haven't reopened.



91% say it is more expensive to buy goods and services now than it was before the pandemic, in line with the region overall (89%).



70% say people are supporting local businesses more than they used to, similar to the region overall (67%).



90% of households say increased numbers of tourists have made it hard for local people to access ferry or air services, higher than the region overall (34%).



69% say it has been more difficult for households in Innse Gall to get tradespeople to do work around residents' houses, in line with the region overall (67%).



77% say community events have been cancelled and haven't restarted, similar to the region overall (72%).



59% say people have been moving to live here because they can work from home, higher than the region overall (45%).



75% of households say it is more difficult to get hold of goods needed now than it was before the pandemic, higher than the region overall (61%).




49% say businesses that closed because of lockdown haven't reopened, lower than the region overall (56%).

PARTICIPATION, PRIDE AND LOCAL DECISION MAKING

Three fifths of residents (59%) report taking part in activities in their local community, in line with the region overall (55%). Most commonly these are attending local community events, local groups or sports clubs or volunteering for a charity, social enterprise or community group. A higher proportion than regionally attend events or are board members of local groups or charities.


There is scope to improve feelings of influence over local decision making. Residents in Inse Gall are split on the extent of their influence which reflects the regional picture.

Participation

 **46%** ATTEND LOCAL COMMUNITY EVENTS, higher than in the region overall

 **32%** ARE MEMBERS OF LOCAL GROUPS OR SPORTS CLUBS

 **26%** VOLUNTEER

 **18%** ARE BOARD MEMBERS higher than the region overall

Pride

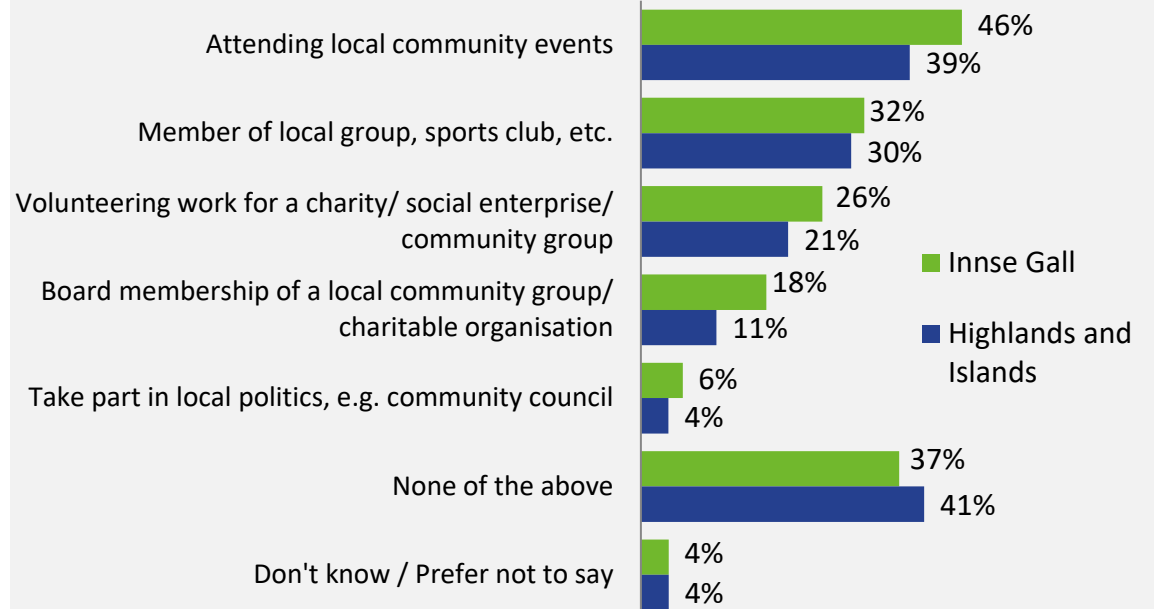
95% ARE PROUD TO LIVE IN INNSE GALL higher than in the region overall (88%)

Local decision making

 **28%** AGREE THAT LOCAL PEOPLE CAN INFLUENCE DECISION MAKING IN THEIR LOCAL AREA

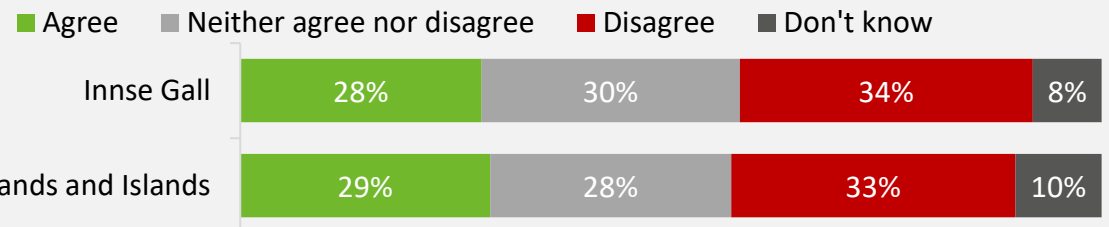
34% DISAGREE

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



Base: All residents, aged 16+ in Inse Gall (361) and the Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

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+ in Inse Gall (361) and the Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

TOWARDS NET ZERO – ENERGY SOURCES AND ELECTRIC VEHICLES

The most commonly used energy sources for heating homes are oil, electricity and coal, with the use of oil and coal in Inne Gall higher than in the Highlands and Islands overall. Use of mains gas is lower than average, reflecting limited access to the gas grid in Inne Gall. Air source heat pumps (8%) are the most commonly used green technology for home heating, and the use of solar panels is less common in Inne Gall than in the region overall. Relatively few households currently have, or plan to buy or lease an electric car.



More households in Inne Gall live in a detached house (56%) or in a house with a working croft (12%), compared to the Highlands and Islands average (47% and 3% respectively). Fewer live in a semi-detached house (17% vs 26%) or a flat in a purpose-built block (2% vs 8%).

Electric cars



3% of households in Inne Gall own or lease an electric or hybrid car, which is lower than in the region overall (7%) and 4% plan to buy or lease one, in line with the region overall (6%). A fifth (19%) have thought about buying an electric/hybrid car and decided against it, lower than the region overall (26%), while 22% have not yet made a decision (24% regionally).

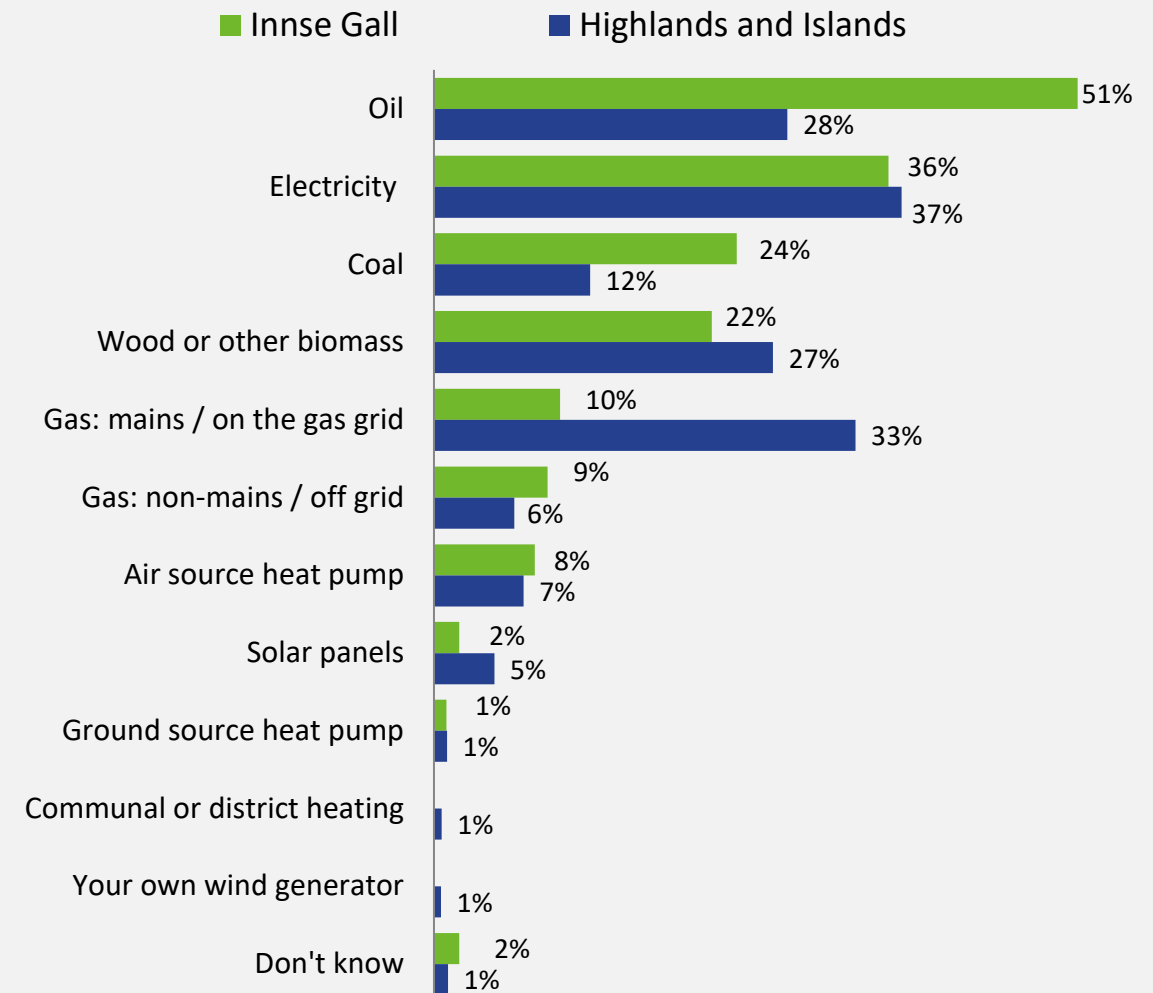
Consistent with the region overall, cost (89%) and availability of public charging points (76%) are key concerns in relation to buying or leasing an electric or hybrid car. Concerns are lower than average in terms of battery life (49% vs 62%) and distance covered on a single charge (68% vs 80%).

63% of households would find it difficult to charge an electric vehicle on the street or at a car park, in line with the region overall (57%).

NOTES

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

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



Base: All households in Inne Gall (317) and the Highlands and Islands (4,442); fieldwork = 28 January - 25 March 2022

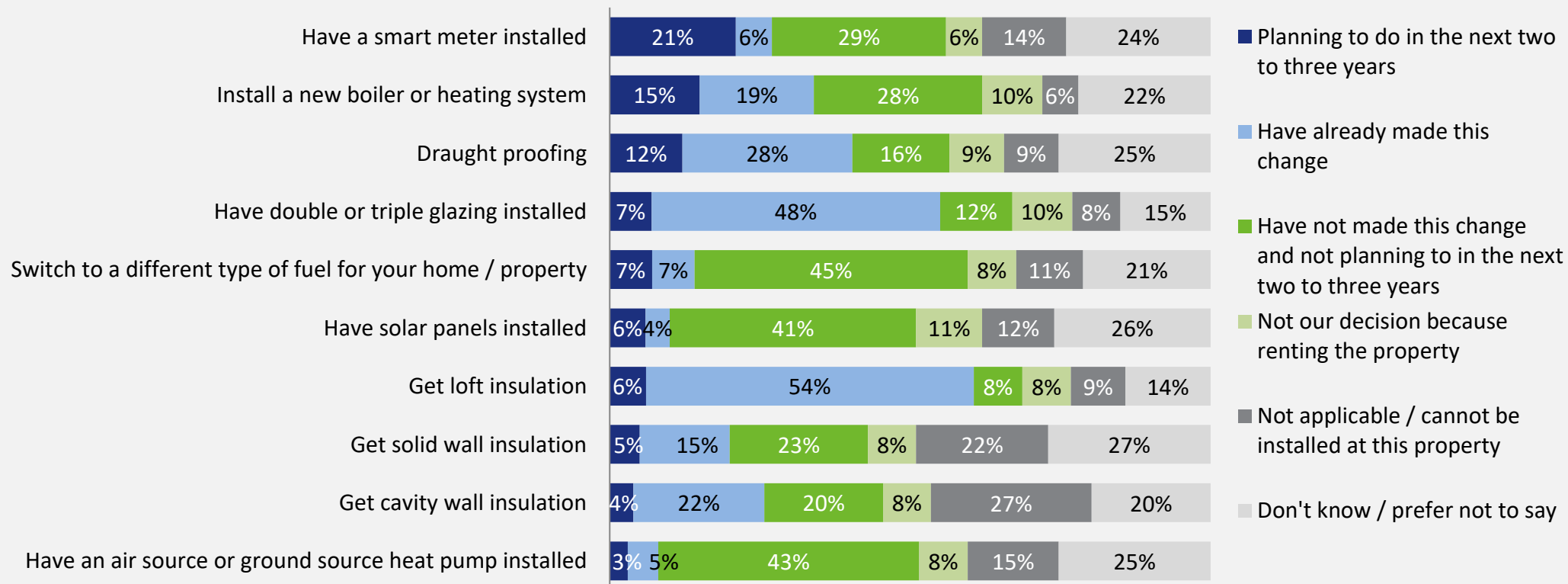
TOWARDS NET ZERO – ENERGY EFFICIENCY IMPROVEMENTS

Households in Inse Gall are more likely to be planning energy efficiency improvements (45%), compared with those in the region overall (36%). The most commonly planned actions are having a smart meter installed (21%), installing a new boiler/heating system (15% and higher than the region overall at 11%) and/or draught proofing (12%).

Among households who are not planning to switch fuel type, the main reasons are: affordability (57%), lack of financial support from the government (39%) and not wanting to make the change (30%).

45% OF HOUSEHOLDS IN INNSE GALL ARE PLANNING TO MAKE AT LEAST ONE ENERGY EFFICIENCY IMPROVEMENT IN THE NEXT TWO TO THREE YEARS, HIGHER THAN THE REGION OVERALL AT 36%

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



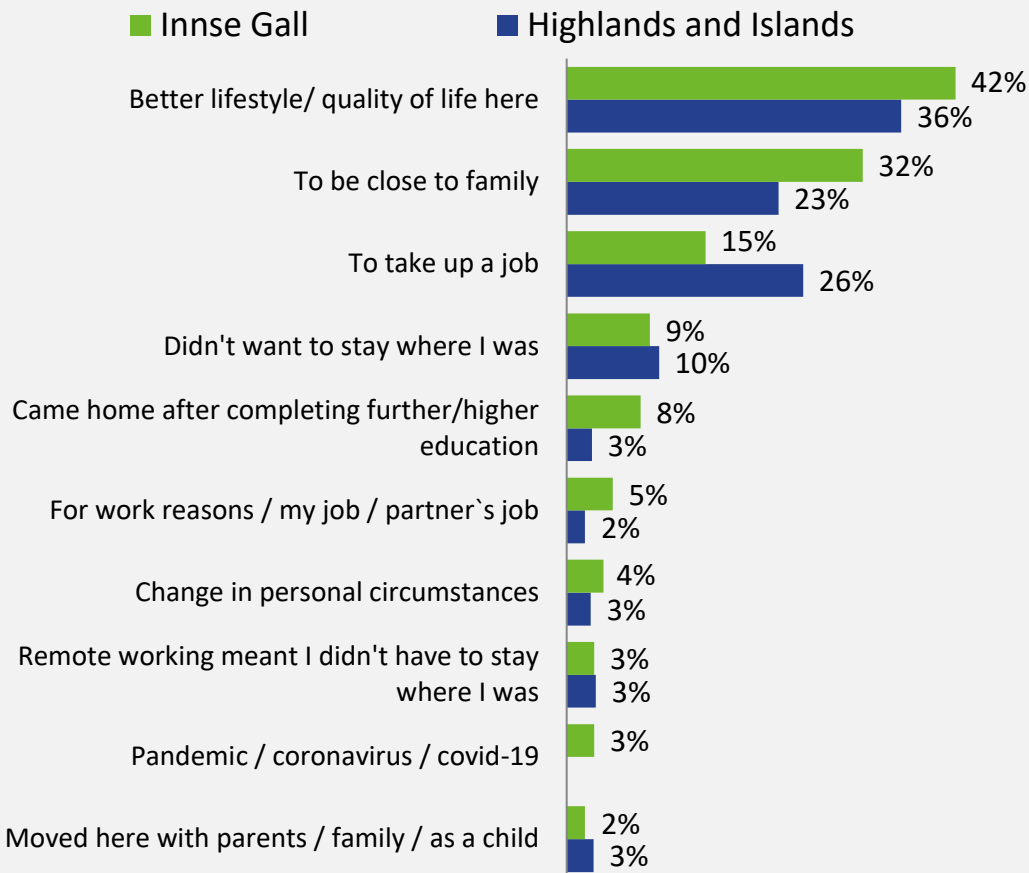
Base: All households in Inse Gall (317); fieldwork = 28 January - 25 March 2022

POPULATION MOVEMENT AND MIGRATION TO THE AREA

Among residents in Innse Gall who have not always lived in the Highlands and Islands, the main reason for moving to the region was for a better quality of life, in line with the regional average. Being close to family was more likely to be mentioned and taking up a job was less likely to be mentioned, compared to the region overall.

Households in Innse Gall are more likely than average to say that most of the people who move to their local area are retired or that people are leaving their area because they can't find work. However, they are also more likely to say that people are moving to their area because they can work from home, and around a quarter agree that people are moving to their local area for new job opportunities (in line with the region overall).

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+ in Innse Gall (225) and the Highlands and Islands (3,449); fieldwork = 28 January - 25 March 2022

Among those in Innse Gall who have not always lived in the region:



32% say they moved to be close to family, higher than the region overall



15% moved to take up a job, lower than the region overall

Among all households in Innse Gall:

74% say people are leaving their local area because they can't find work, higher than the region overall at 47%

69% feel most of the people who move to their local area are retired, higher than the region overall at 56%

51% say new businesses are starting up in their local area, similar to the region overall at 46%

24% say more people are moving to their local area for new job opportunities, compared to 29% regionally

PRIORITIES FOR COMMUNITIES TO THRIVE

The top priorities for communities in Innse Gall to thrive are: housing for local families, more job opportunities and more working age people moving into the area. Housing for local families and having more working age people moving into the area are higher priorities for residents in Innse Gall than regionally.

Optimism

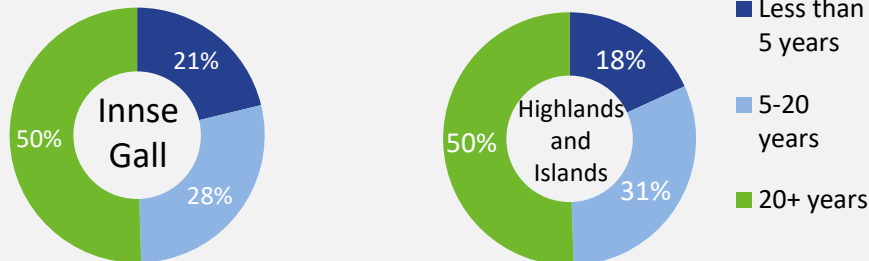
51% of Innse Gall residents are optimistic about their community while 17% are pessimistic - in line with the regional averages (52% and 16% respectively).

Length of residence and future intentions

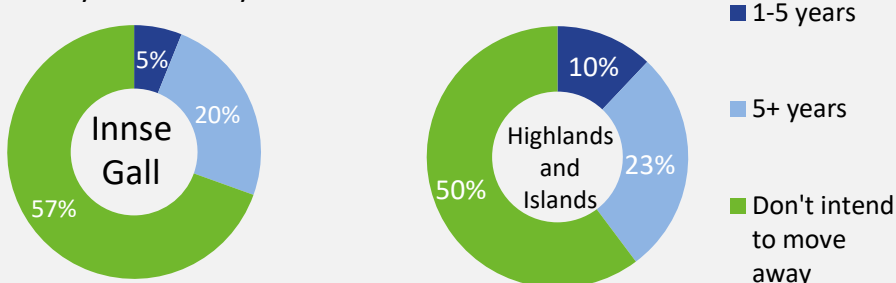
50% of residents have been living in their local area for more than 20 years. Over a quarter (28%) have lived there for between 5 and 20 years and 21% for less than five years – in line with the region overall.

In terms of future intentions, 57% of residents don't intend to ever move away from their local area, higher than the region overall at 50%.

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?

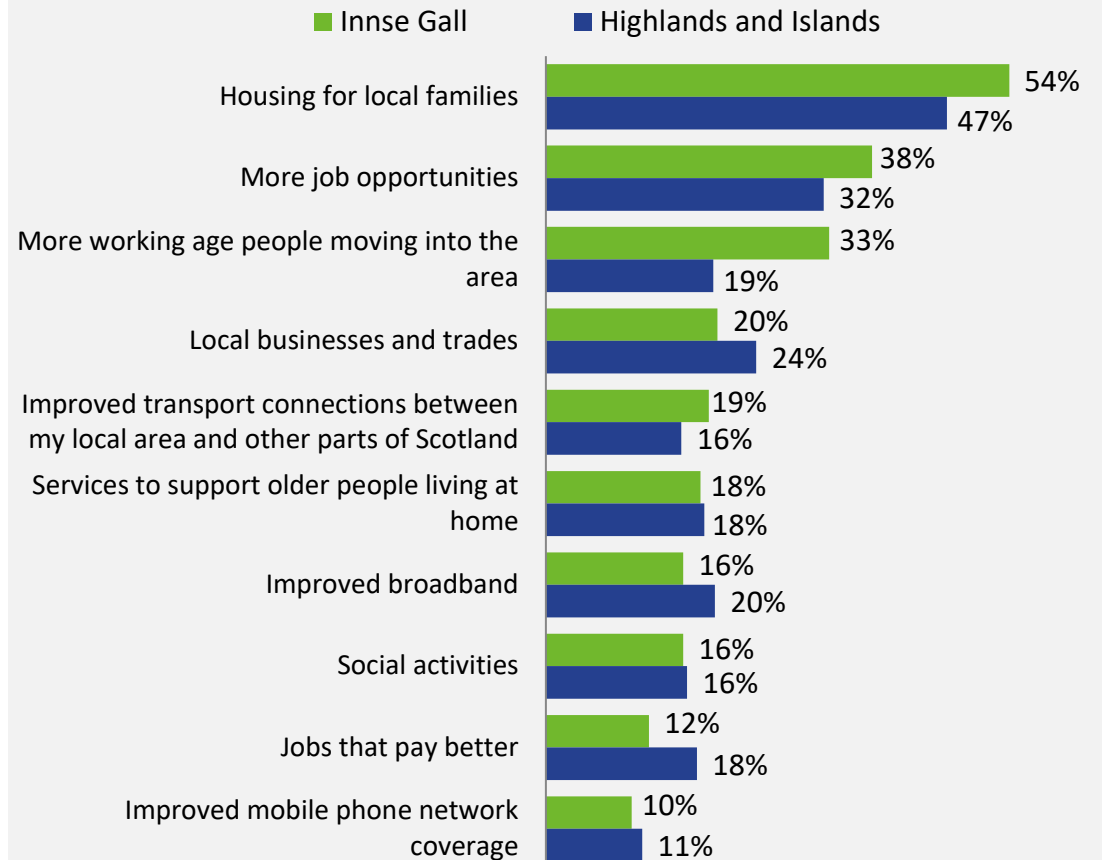


Base: All residents, aged 16+ in Innse Gall (361) and the Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

Priorities

Housing for local families (54%) and more working age people moving into the area (33%) are higher priorities for communities in Innse Gall, compared to those in the region overall (47% and 19% respectively).

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



Base: All residents, aged 16+ in Innse Gall (361) and the Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

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 (3,322 online and 1,979 postal surveys) – a response rate of 28%.

In Innse Gall, 361 interviews were achieved.

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.



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