

# ENABLING OUR NEXT GENERATION

Young People and the Highlands and Islands:  
Maximising Opportunities

November 2018



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# 1 INTRODUCTION

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## OVERVIEW

1.1 This report presents the findings of a major research study focused on the changing attitudes and aspirations of young people aged between 15 and 30, in relation to living in the Highlands and Islands, and how opportunities can be maximised for all those keen to live, work and study in the region. The study involved large-scale engagement with young people as well as extensive desk research and consultations with key stakeholders. It builds on similar research undertaken in 2015 by ekosgen for Highlands and Islands Enterprise (HIE) titled 'Young People and the Highlands and Islands: Attitudes and Aspirations'.<sup>1</sup>

1.2 The population of young people living in the Highlands and Islands remains a key issue for economic growth. Overall 17% of the population is aged 15-30, compared with 21% across Scotland as a whole. Net out-migration of 15-19 year olds remains a significant issue as many leave to access Further or Higher Education (FE or HE). Just under 80% of 20-24 year olds from the region who are studying at universities in Scotland are doing so outside of the Highlands and Islands. Many also leave, or stay away following their education, driven by a desire to pursue a broader range of employment and career progression opportunities. Whilst many young people do choose to return to the region later in life, the out-migration of young people has a significant impact on the overall population size, on community sustainability, and on the possibilities for economic growth.

1.3 The 2015 Attitudes and Aspirations research explored young people's views on the region, their aspirations for the future and the extent to which they felt they could fulfil such aspirations whilst living in the Highlands and Islands. It found that young people have a strong affinity with the region and have immense pride in their local communities. Despite this connection there was a perception that young people must leave the Highlands and Islands to access education or employment opportunities. Whilst many young people viewed this as a temporary move, stating a desire to return when they were older, there were barriers associated with doing so, including a lack of high-quality employment opportunities and affordable housing. The findings of the 2015 study informed a number of policy initiatives implemented by HIE and its strategic partners, including the establishment of STEM Hubs, work to address skills shortages, and transport and connectivity improvements.

1.4 A key focus of policy dealing with issues relating to young people in the Highlands and Islands is talent attraction, retention and return. This is in response to the identified need to support ongoing efforts to rebalance the region's population. Central to this is maximising the opportunities for young people to stay in, return or move to the Highlands and Islands to live, work and study.

## OBJECTIVES

1.5 The study has two principal aims. The first is to provide an overview of the evolving attitudes and aspirations of young people in the Highlands and Islands, and how these have changed since 2015. The second is to identify gaps within the current provision of education, training and employment and make recommendations as to how these can be addressed so that opportunities can be maximised for all young people. The research was designed to address the following objectives:

- Provide a socio-economic profile of young people in the Highlands and Islands overall, and of its sub-regions;
- Provide a brief overview of key regional and national policy initiatives designed to support population growth and talent attraction strategies, along with a discussion of their strengths

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<sup>1</sup> [www.hie.co.uk/young-people-research](http://www.hie.co.uk/young-people-research)

and weaknesses, with a view to identifying areas where policy could be further improved/tailored to support aspiration;

- Track how the attitudes and aspirations of young people have changed, if at all, since the previous study was undertaken in 2015;
- Explore provision of and attitudes to education, training and employment opportunities across the region, identifying gaps, areas of inequality, and good practice examples; and
- Identify areas and specific points for consideration in terms of how to better position the Highlands and Islands as a place where young people want to live, work and study, and further policy interventions which may be required to support this.

## STUDY APPROACH

1.6 The research study consisted of an in-depth survey of young people aged 15-30 both within and outwith the Highlands and Islands, coupled with a programme of online focus groups. These were supported by a social media engagement campaign to foster interest and engagement in the research. A broad programme of consultation with stakeholders across the region was undertaken to explore the perspectives of employers, policy-makers and key groups in relation to the study. Additionally, desk research around regional and national policy aimed at population growth and talent attraction was carried out alongside socio-economic profiling and data analysis of young people in the Highlands and Islands and sub-regions. A more detailed description of the study methods is provided at Appendix 1.

## RESPONDENT PROFILE

1.7 In total 3,130 young people responded to the survey. Whilst the research draws comparison between the results of the 2018 survey and the findings from 2015, it is important to note that there are differences in the respondent profile that are likely to have impacted upon the results. For example, as shown at Table 1.1, there was more even distribution between the three age groups in the 2018 survey, whereas in 2015 over half (51%) of respondents were aged 15-18. The gender split was fairly similar to 2015 as again females were over-represented, comprising over two thirds of total respondents.

**Table 1.1: Respondents by age and gender, 2018 and 2015**

	2018 (%)	2015(%)	+/-
15-18	29%	51%	-22%
19-24	37%	27%	+10%
25-30	34%	21%	+13%
Female	69%	66%	+3%
Male	31%	34%	-3%

*Source: ekosgen survey of young people (2015 and 2018)*

1.8 There were also differences relating to respondents' identification as stayers and leavers. In the 2018 survey nearly half (46%) of respondents identified as committed stayers, compared to 36% in 2015. Conversely the percentage identifying as committed leavers reduced from 34% to 22%. This may be partly related to the more balanced age profile of respondents in 2018, as older respondents are more likely to identify as committed stayers.

1.9 In terms of geography, key differences between 2015 and 2018 include a higher proportion of respondents from the Inner Moray Firth and the Outer Hebrides, where the proportion of respondents increased by six and three percentage points respectively. Conversely the percentage of respondents from Argyll and the Islands and Moray were five and three percentage points lower respectively. More detailed information on the respondent profile is provided at Appendix 2.



1.10 Analysis has also been undertaken on responses by young people from fragile and non-fragile areas. A fragile area<sup>2</sup> is characterised by a declining population, an under-representation of young people, a lack of economic opportunities, and other issues including transport problems and low income levels.

## REPORT STRUCTURE

1.11 The report is structured as follows:

- **Chapter 2** contains a socio-economic profiling of the Highlands and Islands and its population of young people. It also provides a summary of the findings of the 2015 Attitudes and Aspirations research and gives an overview of key policy relating to the retention and attraction of young people to the Highlands and Islands;
- **Chapter 3**, the first of the results analysis chapters, explores the segmentation and self-identification of respondents as stayers or leavers and the perceptions of those who stay or leave held by young people;
- **Chapter 4** discusses the views on education in the Highlands and Islands, particularly regarding the FE and HE offer in the region;
- **Chapter 5** explores the aspirations of young people following education by examining attitudes towards employment and related opportunities in the Highlands and Islands;
- **Chapter 6** looks at community and culture and is focused on the experience of living in the Highlands and Islands. It considers the views of young people on a range of factors from housing and transport to digital connectivity and culture;
- **Chapter 7** is focused on maximising opportunities. It explores what compromises young people feel are necessary to live in the Highlands and Islands and the key opportunities that need to be enabled for young people;
- **Chapter 8** concludes the analysis and provides recommendations for addressing key gaps in the region's employment, education and training offer that can make the Highlands and Islands a more attractive place for young people to live, work and study.

1.12 The following appendices are also provided:

- Appendix 1: Method
- Appendix 2: Survey response profile
- Appendix 3: Consultees

## ACCOMPANYING REPORTS

1.13 In addition to the main report, ekosgen has produced a series of accompanying reports. These comprise eight sub-area reports providing specific analysis of findings within each HIE area office, and an equalities report, which provides analysis of findings related to groups with protected characteristics.

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<sup>2</sup> <http://www.hie.co.uk/regional-information/economic-reports-and-research/archive/review-of-fragile-areas-and-employment-action-areas-in-the-highlands-and-islands---executive-summary.html>

## 2 SOCIO-ECONOMIC PROFILE AND CONTEXT

### Headline messages

- There is a deficit of young people in the Highlands and Islands – those aged 15-30 comprise 17% of the total population compared to 21% across Scotland – and this is projected to continue.
- Much of this deficit is a result of out-migration within the 15-19-year-old age group as significant numbers leave to pursue education and employment opportunities.
- Over half of HE and nearly one third of FE students from the Highlands and Islands are studying at institutions outside of the region.
- Whilst employment and economic activity amongst the region's young people is higher than nationally, those young people who live and work in the region tend to have lower level qualifications than elsewhere in Scotland.
- The 2015 *Attitudes and Aspirations research* found that young people in the Highlands and Islands had a strong sense of pride in their local communities but there were persistent issues around infrastructure and access to education and employment opportunities which acted as a barrier to population attraction and retention.
- Since the publication of the 2015 report, a number of key policy developments within education, employment and infrastructure development have taken place.

### INTRODUCTION

2.1 This chapter provides an overview of the socio-economic and policy context shaping the study. It starts with a socio-economic profile of the Highlands and Islands and outlines particular issues affecting young people. The chapter then goes on to summarise the findings and recommendations of the previous research – Young People and the Highlands and Islands: Attitudes and Aspirations<sup>3</sup> – carried out by ekosgen for HIE in 2015. Finally, it provides an overview of the policy developments of relevance to young people and recommendations from the previous study that have come into effect since 2015

### SOCIO-ECONOMIC PROFILE

#### Overview of the Highlands and Islands

2.2 At just over 40,000km<sup>2</sup>, the Highlands and Islands stretches from Shetland in the north to Campbeltown at the southern tip of Argyll, and from the Outer Hebrides in the West to Moray in the East. With a population density of c.12.1 people per km<sup>2</sup>, in comparison to 131.3 per km<sup>2</sup> in the rest of Scotland (based on 2017 mid-year population estimates), the region has the lowest population density in the UK, and one of the lowest in Europe.<sup>4</sup>

#### Population and migration trends

2.3 Mid-2017 population estimates show that the total population of the Highlands and Islands was just over 470,000. However, there is a lower proportion of young people in the region compared to nationally. In 2016 there were just over 79,000 15-30 year-olds living in the Highlands and Islands comprising 17% of the total population, compared to 21% across Scotland as a whole. From mid-2011 to mid-2016, the population of young people in the Highlands and Islands fell by 2%, whilst the total

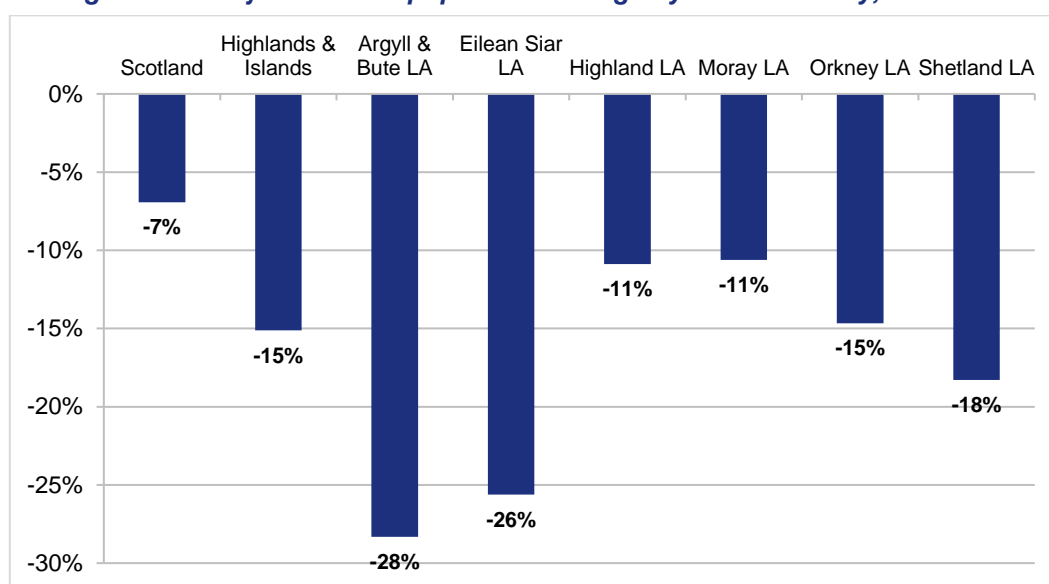
<sup>3</sup> [www.hie.co.uk/young-people-research](http://www.hie.co.uk/young-people-research)

<sup>4</sup> HIE (2013) The Highlands and Islands in Numbers. Please note, figures are based on mid-2017 population estimates from National Records Scotland (NRS)

population remained stable. By comparison, across Scotland the population of young people remained stable while the overall population grew by 2%. By 2041 it is projected that the total population of the Highlands and Islands will decrease slightly by 2%, whilst the number of 15-30 year olds will decrease substantially, by 15% – a far greater decrease than the national projection of 7%.

2.4 There are significant differences in the proportion of young people in the populations of different areas in the Highlands and Islands. The Inner Moray Firth, Moray and Shetland had the highest proportions of young people in mid-2016 at 18% of the total population, whilst the Outer Hebrides, Lochaber, Skye and Wester Ross and Argyll and the Islands had the lowest, at 15%. In the period from mid-2011 to mid-2016 the population of 15-30 year olds declined in all areas except Moray and Lochaber, Skye and Wester Ross where there were 1% and 2% increases respectively. The Outer Hebrides, and Caithness and Sutherland had the most significant declines at 7% each. As shown at Figure 2.1, there are also significant differences in the projected populations of young people in each area. Whilst decreases are projected across all areas, these vary from 11% in Moray and across the Highland local authority area, to 28% in Argyll and Bute.<sup>5</sup>

**Figure 2.1: Projected 15-30 population change by local authority, 2016-2041**



Source: National Records of Scotland (2018)

2.5 Outward migration of young people is a particular concern for the Highlands and Islands, with many moving away to pursue education and employment opportunities. In 2015/16 the net outward migration of 15-29 year olds in the region was 525.<sup>6</sup> It was particularly concentrated within the 15-19 age group where net out-migration was 942, in the 20-24 and 25-29 age groups there were net in-migrations of 99 and 318 respectively. Across all areas there was a net out-migration of young people aged 15-19. As a percentage of the total population size, Eilean Siar (Outer Hebrides) had the highest rates of out-migration of young people, whilst Highland had the lowest. By comparison, across all ages there was a net migration of +2,829 in the Highlands and Islands. There was also positive net migration in every area except Eilean Siar.<sup>7</sup>

## School enrolment and attainment

2.6 Across the Highlands and Islands there were just under 12,000 pupils enrolled in S4 to S6 (aged 15-18) in 2017, accounting for 10% of the total school enrolment in Scotland. Reflecting the population

<sup>5</sup> Local authority areas have been used to measure population projections as figures are not available for HIE office areas.

<sup>6</sup> Whilst the study has defined young people as those aged 15-30, data for migration is only available to cover the 15-29 age group.

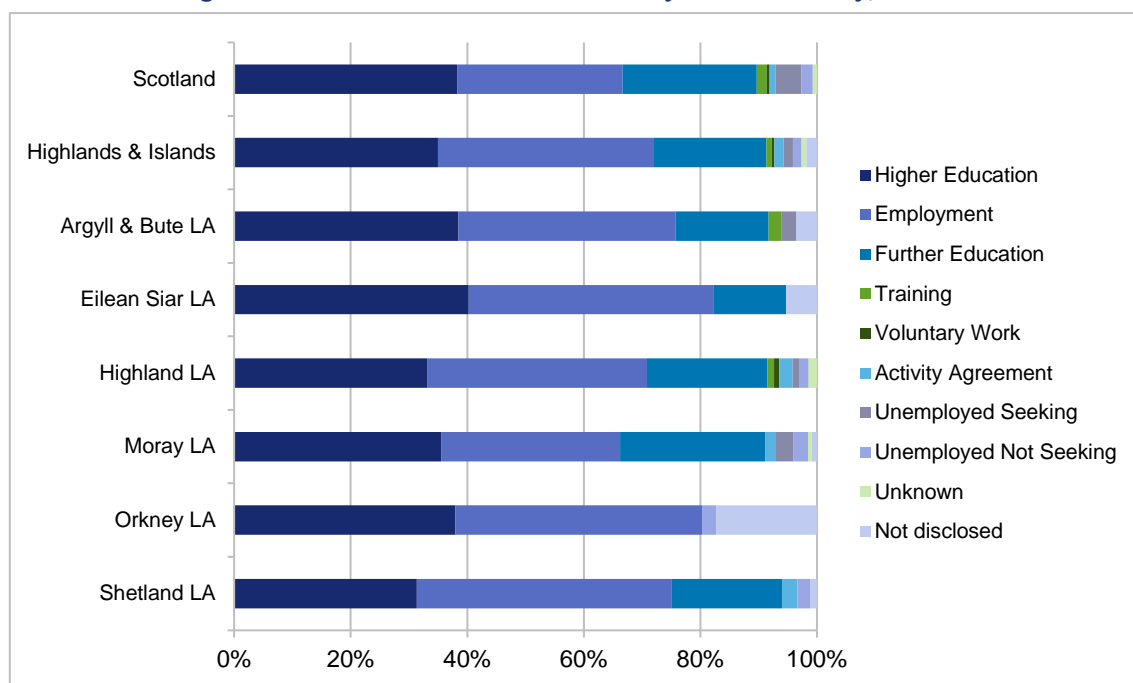
<sup>7</sup> Local authority areas have been used to measure net migration as data is not available at HIE office area level.



spread, just over half of these pupils were based in the Highland local authority area. School leaver attainment in the Highlands and Islands is broadly similar to the national average. In 2016/17 pupils in the Highlands and Islands were more likely to have achieved at least one award at SCQF Level 5 (National 5), but were marginally less likely to have achieved one or more awards at SCQF levels 6 and 7 (Higher and Advanced Higher). Levels of attainment vary by area. For example, 71% of school leavers in the Eilean Siar local authority area achieved at least one Higher, compared to 56% of school leavers in Moray.<sup>8</sup>

2.7 The rate of achievement of positive destinations by young people across the Highlands and Islands is higher than nationally. Approximately 95% of school leavers in the region in 2016/17 went on to a positive destination, compared with 93% across Scotland. School leavers in the Highlands and Islands were much more likely to enter employment, with 37% doing so compared with 28% nationally. However, they were less likely to enter HE – 35% did so, compared with 38% across Scotland. Whilst across all areas a similar percentage of school leavers went on to positive destinations (Figure 2.2), there were differences within the destinations accessed. For example, 44% of school leavers in Shetland went on to employment, compared with 31% in Moray.

**Figure 2.2: School leaver destination by local authority, 2016/17**



Source: Scottish Government (2018)

## Further and Higher Education

2.8 Within the Highlands and Islands FE and HE is, for the most part, delivered through the University of the Highlands and Islands' (UHI) network of 13 independent partner colleges and research institutions.<sup>9</sup> The colleges are based across the region with provision covering each of HIE's area office geographies.<sup>10</sup> Other FE and HE provision in the region is through the following institutions:

- Heriot-Watt University, International Centre for Island Technology, Orkney;
- Glasgow School of Art, Highlands and Islands Campus, Forres;

<sup>8</sup> Local authority areas have been used for school enrolment and attainment figures as data is not available at HIE office area level.

<sup>9</sup> This includes Perth College, which is located just outside of the region.

<sup>10</sup> <https://www.uhi.ac.uk/en/campuses/>

- Scotland's Rural University College, Epidemiology Research Unit, Inverness Campus;
- University of Aberdeen, Highland Medical Education Centre, Inverness Campus;
- Robert Gordon University, Highland Pharmacy Education Centre, Inverness Campus; and
- University of Dundee, dental school placements, Inverness campus.

2.9 In 2016/17 there were just under 9,000 HE enrolments and just under 32,000 FE enrolments at UHI.<sup>11</sup> Inverness College is the largest educational institution in the region, accounting for 24% and 14% of all HE and FE enrolments respectively. Across the 13 UHI partner colleges, 63% of HE students and 67% of FE students are from the Highlands and Islands. In comparison with the national average, students studying in the Highlands and Islands tend to be older – 48% of HE students are aged 25+, compared to 39% nationally. Similarly, 50% of FE students in the region are aged 25+ compared to 41% across Scotland.

2.10 As well as students studying in the region, a significant number of students from the Highlands and Islands are studying elsewhere (Figure 2.3). In 2016/17, 56% of HE and 31% of FE students from the Highlands and Islands studied at institutions outside of the region.<sup>12</sup> For FE, this is close to the national average (29% of FE students across Scotland studied outside their home region). However, it is important to note that outside of the Highlands and Islands it is generally easier for students to commute between different college regions. This is particularly the case in areas such as the west Central Belt where there are many college regions in close proximity (Lanarkshire, Glasgow, Ayrshire and West) making it easier for students to attend colleges outside of their own locality and thus to access particular specialisms. For HE the data suggests that it is far more common for HE students from the Highlands and Islands to study outside of their home region than students from other parts of Scotland. For example, in two comparator local authorities – Aberdeen and Edinburgh – 26% and 34% of HE students respectively studied outside of their local area in 2016/17. In total 12% of HE students from the Highlands and Islands were studying through the Open University, so were likely to be studying from their home. This compares with 10% of HE students across Scotland.

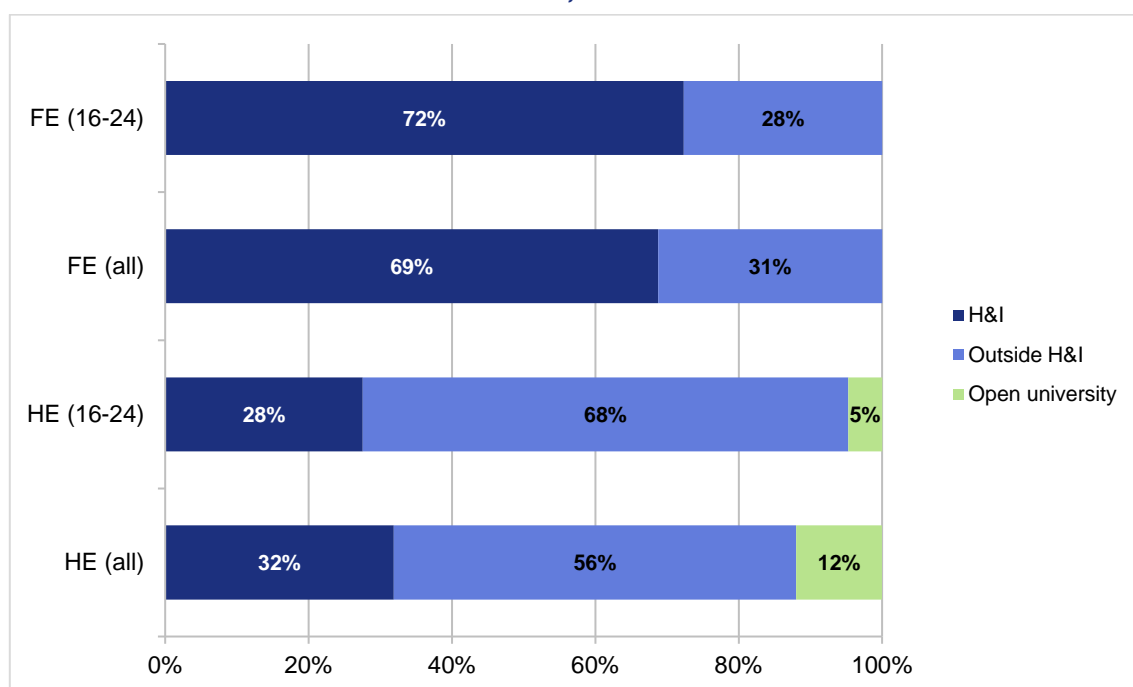
2.11 It is also important to note that younger HE students from the Highlands and Islands were more likely to study outside of the region, with 68% of 16-24 year olds doing so (Figure 2.3). The trend was not replicated for FE students, proportionally fewer 16-24 year olds (28%) studying outside of the region. For those HE students from the Highlands and Islands who were studying outside the region, universities in Aberdeen were most popular, with Robert Gordon University accounting for the largest number (1,444), followed by the University of Aberdeen (1,051) and then the University of Glasgow (809). For FE students, the most common institutions for students from the Highlands and Islands to attend outside of the region were City of Glasgow College (1,712), West College Scotland (1,285) and North East Scotland College (808). These colleges offer specialisms including Transport Services and Business Management (City of Glasgow College), Nautical Studies and Marine Engineering (City of Glasgow College), Health Care (West College) and Energy (North East College).

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<sup>11</sup> It was not possible to provide a breakdown of students studying at other institutions in the Highlands and Islands.

<sup>12</sup> Scottish Funding Council (SFC) Data

**Figure 2.3: Geography of HE/FE institution attended by students from the Highlands and Islands, 2016/17**



Source: Scottish Funding Council (2018)

## The labour market

2.12 Across the Highlands and Islands, just under 70% of 16-24 year olds were employed in 2017 and 77% were economically active.<sup>13</sup> This compares favourably with the national averages of 59% in employment and 66% economically active. This may reflect the higher proportion of school leavers in the Highlands and Islands moving in to employment. It is also part of a wider trend of higher rates of overall employment and economic activity in the region. In 2017 both total employment and economically active rates were five-percentage points higher than nationally. In the period from 2012 to 2017 there was a five-percentage point growth in employment of 16-24 year olds in the Highlands and Islands and a three-percentage point growth in economic activity. This is likely a reflection of recovery from the recession and the effect of national policies and strategies to tackle youth unemployment (such as Developing the Young Workforce, detailed below).

2.13 In 2017, just under half (48%) of employed 16-24 year olds in the Highlands and Islands worked in the retail and hospitality sector, compared with 21% of the total population of the region. This has increased from 40% in 2013. It is also above the national average of 41% of employed 16-24 year olds working in retail and hospitality. The retail and hospitality sector tends to offer lower pay and conditions and the prevalence of jobs in this sector may be influencing perceptions of a lack of positive career opportunities in the region.

2.14 It is also notable that despite school attainment being in line with the national average, 16-24 year olds living in the Highlands and Islands tend to have lower level qualifications than elsewhere in Scotland. For example, in 2017, 25% had a qualification at NVQ Level 4 (undergraduate degree) or higher, compared to 27% across Scotland. This may be influenced by young people from the region gaining their university education elsewhere, or by perceptions of job and education opportunities in the region, leading to young people with higher level qualifications moving elsewhere in the pursuit of higher level jobs and educational opportunities. The results of the 2018 survey showed that those young people aged 15-30 who identified themselves as reluctant stayers tended to have lower levels of

<sup>13</sup> Whilst the study has defined young people as those aged 15-30, data for youth unemployment is only available to cover the 16-24 age group.

qualifications, whilst school pupils who identified as committed leavers were far more likely to plan to attend university (72%) than those who identified as committed stayers (33%).

## Unemployment

2.15 The unemployment rate for 16-24 year olds in the Highlands and Islands is low, at 6.9% in 2017 compared with 9.2% nationally. This reflects the lower unemployment rate across the Highlands and Islands overall. Similarly, the economic inactivity rate is well below the national average, at 22.1% compared with 34.5%. In recent years there has been a trend of increased employment and economic activity and the proportion of unemployed and economically inactive 16-24 year olds in the region fell by three and two percentage points respectively from 2012 to 2017.

## 2015 ATTITUDES AND ASPIRATIONS STUDY

2.16 The 2015 Attitudes and Aspirations research examined the attitudes and aspirations of young people aged 15-30 in relation to the Highlands and Islands.<sup>14</sup> It built upon initial research undertaken in 2009<sup>15</sup>, and was based on a large-scale survey and online focus groups with young people living in and outwith the region. It was complemented by desk research and consultations with key stakeholders.

2.17 The 2015 study concluded that young people in the Highlands and Islands had an overwhelmingly positive view of the region, but a significant number still felt that there was a need to move away to access employment and education opportunities. Of those who did move away, many planned to return at some stage but there were and remain barriers to doing so, including the availability and affordability of housing and higher-level job opportunities.

2.18 Between 2009 and 2015, it was notable that attitudes towards young people who choose to remain in the Highlands and Islands had become more positive. The study found that there was a fairly even split between those who described themselves as “committed stayers” (43%) and those who described themselves as “committed leavers” (40%). A significant number of respondents (14%) described themselves as “reluctant leavers”. School pupils were far more likely to be committed leavers than those towards the upper end of the age band. In 2015, of those who had left the Highlands and Islands to live elsewhere, a quarter were potential returners, and half of the respondents who had not previously lived in the region were interested in the possibility of doing so.

2.19 The 2015 report considered various aspects of life in the Highlands and Islands, and the push and pull factors that affect young people’s choices about staying and leaving the region. One key issue was education, as the study found that with the growing presence of UHI, the FE and HE offer in the Highlands and Islands was rated more positively in 2015 than it had been previously. In 2009 just under half of participants (45%) rated access to FE and HE in the region as poor, falling to 23% for FE and 33% for HE in 2015. Despite greater recognition of UHI and more than half of respondents saying they would be happy to attend a UHI institution, it was still not seen as comparable with other universities in Scotland and was not widely considered to be prestigious. Overall, education was ranked as the fourth most important issue for attracting young people to the Highlands and Islands. Other more secondary issues included access to transport, digital connectivity and recreational and social opportunities.

2.20 As well as issues to be tackled in attracting young people to the Highlands and Islands, there were considerable pull factors leading young people to want to stay in or return to the region. Over half of all survey respondents wanted to be living in the Highlands and Islands by the time they were 35. An important factor supporting this was the pride young people have in their communities – nearly 80% of participants agreed they were proud to be associated with their local community, with 40% strongly agreeing. This was a six-percentage point increase on 2009, reinforcing the view that the Highlands

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<sup>14</sup> ekosgen/HIE (2015) Our Next Generation: Young People and the Highlands and Islands: Attitudes and Aspirations, Research Report – June 2015

<sup>15</sup> HIE (2009) Young people in the Highlands and Islands: Understanding and influencing the migration choices of young people to and from the Highlands and Islands of Scotland

and Islands was a better place to live than five years previously, which three-quarters of participants agreed with.

2.21 However, the survey found that a significant number of barriers remained which worked against attracting and retaining young people in the region. Employment/career progression and housing were highlighted as the two most important factors influencing the attractiveness of the Highlands and Islands as a place to live. Just 35% and 29% of respondents respectively rated employment opportunities and career progression opportunities as good/very good. For housing, which was ranked as a more important issue than it had been in 2009, one quarter felt there was a good choice of property to buy in the region, with only slightly more, 30%, feeling there was a good choice of property to rent.

2.22 Recommendations from the 2015 Attitudes and Aspirations research included:

- Developing the availability and the take-up of the FE offer, particularly in Argyll and the Islands and the Outer Hebrides;
- Broadening the appeal of UHI and developing its HE and postgraduate offer;
- Creating a larger, more diverse pool of employment opportunities and working to improve opportunities for career progression through supporting employers with upskilling and succession planning;
- Increasing young people's awareness of better paid opportunities within the key growth sectors of Food and Drink and Sustainable Tourism;
- Increasing the supply of affordable housing to buy and housing to rent, promoting help to buy schemes and tackling the issue of second home ownership;
- Reducing costs of transport and tackling issues around poor timetabling and co-ordination; and
- Increasing the awareness and use of NGA broadband to support remote learning and working.

## POLICY CONTEXT

2.23 Since its publication, the 2015 Attitudes and Aspirations research has been used extensively by HIE and its partner agencies to inform and progress a range of policies, strategies and other initiatives directly related to its recommendations on creating greater opportunities for young people to remain in the region. This has included work to develop employment opportunities, educational provision, understand and address housing concerns and other infrastructure improvements.

### Developing the Young Workforce

2.24 The Developing the Young Workforce (DYW) Programme has been a particularly important area of national policy. The Commission for Developing Scotland's Young Workforce (the Wood Commission), was established in January 2013 during a period of high youth unemployment. It considered how to achieve better connectivity and co-operation between education and the world of work, alongside the development of the intermediate vocational education and training system. The aim was to ensure young people at all levels of education understand the expectations of employers, and that employers are properly engaged. The report, published in June 2014, contained 39 recommendations relating to schools, colleges, apprenticeships, employers and equalities.

2.25 Following this, the Scottish Government's Youth Employment Strategy, Developing the Young Workforce, was published in December 2014. It accepted all 39 recommendations in the Commission's report and set out how these would be implemented.<sup>16</sup> The DYW Strategy aims to create an excellent, work-relevant education offer to young people in Scotland, giving them the skills for the current and

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<sup>16</sup> Scottish Government (2014) *Developing the Young Workforce - Scotland's Youth Employment Strategy*

future jobs market. This includes creating new vocational learning options; enabling young people to learn in a range of settings in their senior phase of school; embedding employer engagement in education; offering careers advice at an earlier point in school; and introducing new standards for careers guidance and work experience. The Strategy is targeted at improving Scotland's young workforce on issues such as better preparing school leavers for the world of work and encouraging employers to engage with education and recruit more young people.

2.26 DYW has been implemented locally through a network of area-based groups. Within the Highlands and Islands there are eight DYW groups: Argyll and Bute, Inverness and Central Highland, North Highland, Shetland, Orkney, Outer Hebrides, Moray and West Highland. Their activity has included working with employers to promote local career opportunities in schools. This has been important for both raising young people's awareness of the opportunities available and for encouraging employers to offer work experiences, apprenticeships and other employment opportunities to support young people. North Highland DYW's work within schools has included the development of work experience opportunities for pupils, workshops for mock interviews, CV preparation and entrepreneurship competitions. For Moray DYW there has been a focus on support for young people to enter the "middle ground" (between high and low skilled jobs) through building confidence and capability.

## Highlands and Islands Regional Skills Investment Plan

2.27 The Highlands and Islands Regional Skills Investment Plan (SIP) was developed by Skills Development Scotland (SDS) and published in 2014.<sup>17</sup> It identified the biggest skills challenge to the Highlands and Islands as the retention and attraction of working age people, with an identified shortage of skilled workers in the 15-39 age group, and a higher proportion of hard-to-fill and skills shortage vacancies than nationally. The SIP highlighted a need for better alignment, and better cross-sector collaboration around employers' needs, especially around Science, Technology, Engineering and Mathematics (STEM) industries and the digital sector. The SIP is supported by the Regional Skills Assessment, updated on an annual basis by SDS.<sup>18</sup> The most recent update demonstrates that the skills shortage in the Highlands and Islands remains significant, and that there is a net replacement demand of around 72,000 workers in the Highlands and Islands between 2018 and 2028.

## Employability and talent attraction

2.28 Other employability initiatives have been implemented at local authority level. For example, Highland Council's Youth Employment Initiative offers opportunities to all care-experienced young people and is looking to increase the number of Highland Council Modern Apprenticeships from 90 to 150. Through the Moray Growth Deal there have been efforts to encourage employers to employ or give opportunities to young people.

2.29 The Highlands and Islands Talent Attraction, Retention and Return Strategy and Action Plan is another key development. This can be considered a direct response to the issues and recommendations raised by the *Attitudes and Aspirations* research. Initial research to inform the Strategy was first published in November 2016.<sup>19</sup> This outlined the need for the Strategy and Action Plan to address key issues within the Highlands and Islands, including a declining working age population, out-migration of young people, underemployment and skills deficits. The Strategy aims to address these issues by:

- Increasing the number of working age people living and working in the region;
- Reversing the forecast decline in population while rebalancing from aging to young/working age residents by achieving year-on-year positive net migration;

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<sup>17</sup> SDS (2014) Highlands and Islands Skills Investment Plan

<sup>18</sup> <http://www.skillsdevelopmentscotland.co.uk/regional-skills-assessments/>

<sup>19</sup> <http://www.hie.co.uk/growth-sectors/universities/talent-attraction.html>



- Ensuring that businesses located in (or locating into) the Highlands and Islands can access an appropriate scale and scope of skilled future talent; and
- Developing a co-ordinated approach across the Highlands and Islands to talent attraction and retention.

2.30 The key purpose of the Strategy is to retain and attract young people to the Highlands and Islands. To do this, it responds to the recommendations of the 2015 report around developing and marketing the region's education and employment offer through the accompanying Action Plan. Key points within the Action Plan include:

- Promoting the unique offer of the University of the Highlands and Islands (UHI) in subjects such as Archaeology, Outdoor adventure, Golf and Forestry;
- Demonstrating the education opportunities available across the region and all sectors;
- Working with young people who have remained in or returned to the Highlands and Islands to promote their career pathways via Skills Development Scotland and Talent Scotland;
- Developing resources for teachers to use with pupils that showcase the range of employment, training, education and apprenticeship opportunities available across the Highlands and Islands;
- Considering the development of a passport system to offer young people clear and continual support in early stage careers;
- Offering business support services to encourage the growth and development of local businesses; and
- Developing marketing and information around the local economies and skills needs within specific areas.<sup>20</sup>

## Education

2.31 In relation to education, the opening of Inverness Campus in May 2015 has been a key development. The campus is focused on Life Sciences and takes a triple helix approach through co-location of public, private and educational institutions in order to foster collaboration. Inverness Campus is home to teaching and research centres/collaborative projects involving five different institutions – UHI, University of Dundee, University of Aberdeen, Robert Gordon University and Glasgow School of Art. Student residences were built on the Inverness Campus as part of Inverness College moving its main site to the Campus, offering student residences to Inverness College students for the first time.

2.32 Other educational developments have included increased research activity at UHI, which has helped to attract more students. For example, at the last Research Excellence Framework (REF) exercise in 2014 there were five FTE researchers working in health, there are now 25 FTEs. The Oban as a University Town project has also been an important development, which has sought to target young people and make Oban a more attractive place to study. This has included increasing the curriculum offer at Argyll College, which has led to a significant increase in enrolment, and engaging with employers to ensure education meets industry need.

2.33 The launch of e-Sgoil in August 2016 has been an important development for educational provision in the Outer Hebrides. e-Sgoil uses video technology to allow teachers to deliver classes from their homes, schools or e-Sgoil hubs to schools that are unable to employ staff within a particular subject. It was introduced to improve equity of subject choice in the Outer Hebrides but has been used to provide classes, particularly in Gaelic, to schools across Scotland.

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<sup>20</sup> Ibid.

## Infrastructure

2.34 Since the publication of the 2015 study there have been a number of infrastructure developments relevant to the recommendations around housing, digital connectivity and transport. HIE recently published research on Stimulating Housing Development in the Highlands and Islands which highlighted the significant number of “young and stuck” people – young people aged 26+ who are in full-time work but are neither the householder nor the spouse in the household. In response, the study made a number of recommendations, including refocusing housing supply targets to be based on what is required rather than what is achievable; activity to develop possibilities for self-build including the potential provision of loans for site acquisition; and simplifying the availability of funding.<sup>21</sup> Other developments within housing have included £5 million funding through the Inverness and Highland City Region Deal for new mid-market housing projects. The project will see the building of 61 new homes aimed at young people and let at mid-market rates (80% of the average rate charged by private landlords in the area).<sup>22</sup>

2.35 Key developments in digital connectivity have included the continuing rollout of superfast broadband across the region through the Digital Highlands and Islands Project. Starting in 2013, rollout has continued into 2018 with the aim of having fibre access in 86% of premises in the region by the end of the project. Looking ahead, the Scottish Government has committed to 100% superfast availability by 2021 (the R100 commitment<sup>23</sup>) and plans are currently being developed for how this can be achieved.<sup>24</sup>

2.36 Other developments have included the Scottish Government’s Mobile Action Plan, which was launched in 2016 in agreement with the UK’s four biggest mobile operators. The Action Plan is based on the objective of improving mobile coverage across Scotland by identifying where gaps will be after commercial rollout and setting out steps that can be taken (e.g. business rates relief and investment in infrastructure) to address barriers to rollout in non-commercial areas. The Scottish Government has also developed the Scottish 4G Infill programme in collaboration with the Scottish Futures Trust and the mobile industry. The programme seeks to deliver future-proofed mobile infrastructure and services in around 60 to 70 complete mobile “not spots”. The contract for the programme has now been awarded and it will be delivered over four years from 2018 to 2022.<sup>25</sup> The improvement of mobile coverage is particularly important as in the 2015 Attitudes and Aspirations research young people cited mobile connectivity more frequently than broadband as a factor to be addressed to make the region more attractive to young people.

## Inverness and Highland City Region Deal

2.37 There are a number of developments flowing from the Inverness and Highland City Region Deal. City Deals in Scotland are a UK and Scottish Government initiative to put cities and their environs in direct control of both exploiting their economic opportunities and tackling their challenges. City Deals are agreements between government and a city that give cities the necessary resources and control to: take responsibility for decisions that affect their area; do what they think is best to help businesses grow; stimulate economic growth; and decide how public money should be spent.<sup>26</sup> The Inverness and

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<sup>21</sup> <http://www.hie.co.uk/regional-information/economic-reports-and-research/archive/stimulating-housing-development-in-the-highlands-and-islands.html>

<sup>22</sup> [https://www.highland.gov.uk/news/article/10824/city\\_region\\_deal\\_funding\\_for\\_new\\_homes\\_across\\_the\\_highlands](https://www.highland.gov.uk/news/article/10824/city_region_deal_funding_for_new_homes_across_the_highlands)

<sup>23</sup> <https://beta.gov.scot/publications/digital-scotland-reaching-100-programme/>

<sup>24</sup> <http://www.hie.co.uk/regional-information/digital-highlands-and-islands/can-i-get-it.html>

<sup>25</sup> <https://beta.gov.scot/policies/digital/broadband-and-mobile/>

<sup>26</sup> <https://www.gov.uk/government/publications/2010-to-2015-government-policy-city-deals-and-growth-deals/2010-to-2015-government-policy-city-deals-and-growth-deals>

Highland City Deal was agreed in March 2016 and its main priorities include supporting economic growth and attracting more young people to live, work and study in the region.<sup>27</sup>

2.38 Key City Deal projects looking to address barriers to attracting and retaining young people in the region include the East Link and Longman Interchange road infrastructure project. This £109 million transport project will see the building of a new “East Link” road between Inshes and Smithton in Inverness and a flyover at the Longman Roundabout to allow better connectivity and the opening up of areas to economic development.<sup>28</sup>

2.39 Other developments have been focused on the areas of skills and innovation, which are key in addressing recommendations around employment and education opportunities and career progression. The Science Skills Academy project was established in 2017 with £3 million of City Deal funding. The project is based at Inverness Campus and aims to increase the uptake of STEM and Digital subjects by school pupils. Its core work will be the establishment and delivery of Newton Rooms across the Highlands.<sup>29</sup> Newton rooms are centres to support schools in practical STEM activity and a base for extracurricular projects that can inspire children and young people to pursue careers in STEM. The first Newton room will soon be opened at North Highland College in Thurso.<sup>30</sup>

2.40 Also part of the Inverness and Highland City Region Deal, the Northern Innovation Hub (NIH) was announced at the end of 2017 with the first projects beginning in 2018. The NIH has received £16 million in funding to support its work with SMEs in the Highland Council area to improve and develop their business performance through innovation. The Hub is focused on four sectors – Life Sciences, Tourism, Food and Drink and Creative Industries, and has a specific strand of activity focused on Young People and Technology. The work of the NIH will help to improve employment and career progression opportunities for young people in the Highlands and Islands. Activity specifically aimed at young people includes technology-based work placements for students and graduates, long-term support for entrepreneurs aged under 30 and a coding academy to train junior software developers.<sup>31</sup>

2.41 Outside of the Inverness and Highland City Region Deal, a Regional Skills Manager post has been created at HIE as a direct result of the 2015 Attitudes and Aspirations research. The post’s remit covers the development of a smart, sophisticated education offer across FE and HE. However, it also has a much wider focus, in partnership with other strategic actors, on encouraging a more supportive environment in the Highlands and Islands to ensure that young people ‘stick’ – identifying the missing components that allow young people to develop their careers in the region, and stay.

## Future developments

2.42 Other policy developments of relevance to the 2015 study’s recommendations have not yet come to fruition but are currently in the proposal stage. These include the proposed Islands Deal, which would cover Orkney, Shetland and the Outer Hebrides and would be similar to City Region Deals which have been put in place elsewhere. Within the planned Islands Deal, key proposals for young people include a series of projects around innovation and workplace development that will contribute to employment and career progression opportunities, as well as plans for new models of housing to offer affordable accommodation to students and young people.<sup>32</sup> Similarly the Argyll Rural Growth Deal is currently at the proposal stage but includes a number of relevant potential actions around skills

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<sup>27</sup>[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/520760/Heads\\_of\\_terms\\_agreement.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/520760/Heads_of_terms_agreement.pdf)

<sup>28</sup>[https://www.highland.gov.uk/info/209/regeneration\\_and\\_town\\_centre\\_management/715/city\\_region\\_deal\\_project\\_information/8](https://www.highland.gov.uk/info/209/regeneration_and_town_centre_management/715/city_region_deal_project_information/8)

<sup>29</sup><http://www.hie.co.uk/regional-information/science-skills-academy/about-us.html>

<sup>30</sup><http://news.hie.co.uk/all-news/firm-appointed-to-create-scotland-s-first-newton-room-in-thurso/>

<sup>31</sup><http://www.hie.co.uk/business-support/northern-innovation-hub.html>

<sup>32</sup><https://www.cne-siar.gov.uk/media/8198/K%20Item%2011B%20-%20Appendix%20to%20IOF%20Report%20Islands%20Deal%20Executive%20Summary%20at%20250117.pdf>

development and housing and infrastructure improvement.<sup>33</sup> The Moray Growth Deal is also at the proposal stage, with its planned actions including work to increase the number of higher paid jobs in the area, improve the skills offering and boost infrastructure.<sup>34</sup> In North Ayrshire there are possibilities around the pilot basic income scheme, which may be tested in Arran and Cumbrae to see if this would help young people to remain on the islands and work in self-employment.

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<sup>33</sup> <https://www.argyll-bute.gov.uk/rgd>

<sup>34</sup> <http://www.mymoray.co.uk/moray-growth-deal/>

### 3 STAYING AND LEAVING

#### Headline messages

- More young people living in the Highlands and Islands intend to remain in the area, or would prefer to stay in the region, than in 2015.
- As in 2015, 25-30-year olds are more likely to be committed stayers, however the proportion of school pupils who see themselves as committed leavers has fallen since 2015.
- Those in fragile areas are more likely to be reluctant leavers and having left, to want to return, than those in non-fragile areas.
- Young people who remain in the Highlands and Islands are regarded less negatively by their peers than in 2015. Those who leave the region are assumed to be looking to broaden their life experiences and worldview or pursuing education or employment opportunities, and most young people think that leavers will return when the time is right.
- Almost three quarters of school pupils expect to continue studying when they leave school, with most hoping to go to university. Those in non-fragile areas are more likely to want to enter employment on leaving school than those in fragile areas, with the latter more likely to aspire to further or higher education.
- Experiences outside of school and advice provided by family and friends have most influence on young peoples' decisions about what to do when they leave school.
- School pupils are broadly happy with available subject choices although there is a perception that the range offered/available limits their post-school options. Subject choices at school are viewed as more limited in fragile areas and to have a greater impact on post-school choices.
- Extending the use of online delivery and distance learning could help broaden access and subject choice for young people in the Highlands and Islands.
- There is scope for careers advice to be enhanced and delivered more consistently across the region. In addition, increasing the awareness of employment opportunities would have a positive impact on population attraction and retention, particularly in the most fragile areas.

#### INTRODUCTION

3.1 This chapter examines the attitudes and perceptions of young people in relation to staying in, or leaving the Highlands and Islands, their likelihood of doing so, and whether their decision is out of choice or necessity. It also looks at how the young people in the research view the choices of *other* young people.

3.2 There are six broad categories that best describe the respondents in terms of their likelihood of staying in, leaving or moving to the region,<sup>35</sup> shown in Table 3.1. Survey respondents were asked to select the category that best described them.

<sup>35</sup> HIE (2009) *Young people in the Highlands and Islands: Understanding and influencing the migration choices of young people to and from the Highlands and Islands of Scotland*, pp 66-73

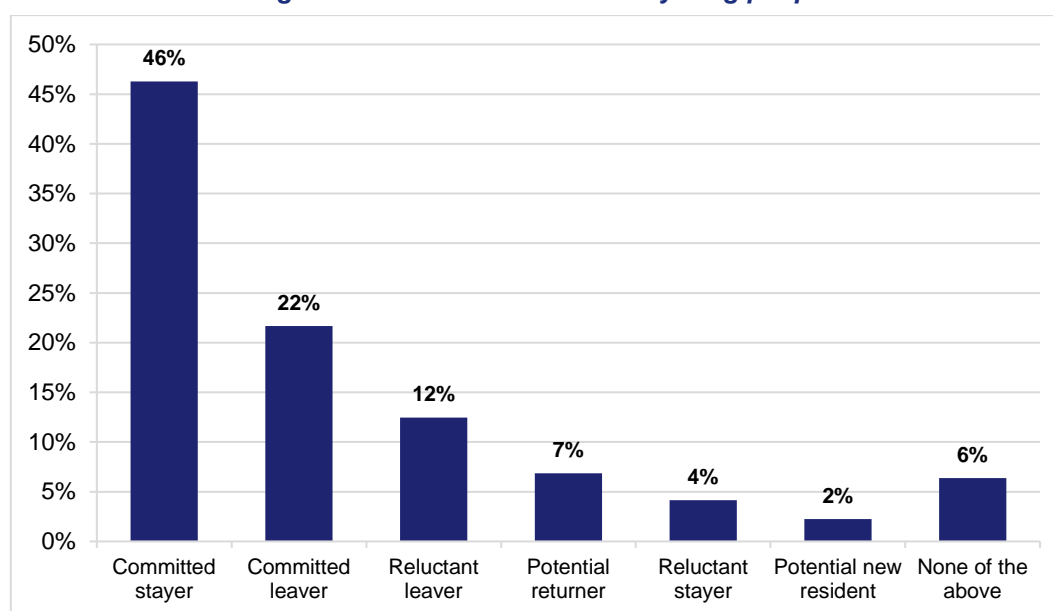
**Table 3.1: Self-identification segmentation categories**

Category	Description
<b>Committed stayer</b>	I live in the Highlands and Islands and plan on living and working here
<b>Reluctant stayer</b>	I live in the Highlands and Islands; I would prefer to leave but I don't think I will be able to
<b>Reluctant leaver</b>	I live in the Highlands and Islands; I would prefer to stay but I don't think I will be able to live and work here
<b>Committed leaver</b>	I live in the Highlands and Islands, but plan to leave, and live and work elsewhere
<b>Potential returner</b>	I live outside the Highlands and Islands, but I would like to return having lived there previously
<b>Potential new resident</b>	I live outside the Highlands and Islands, and am interested in living there though have not done so previously

## SELF-IDENTIFICATION AND SEGMENTATION

3.3 Almost half (46%) of survey respondents identified themselves as committed stayers (i.e. living in the Highlands and Islands and wanting to continue to live and work there) (Figure 3.1). Those who identified as reluctant stayers (i.e. they would prefer to leave the region but didn't think they would be able to) represented the smallest group of young people living in the region (4%). Just over a fifth (22%) were committed leavers.

3.4 This is a marked change from 2015 where there were almost equal numbers of committed stayers and leavers (36% and 34% respectively). It indicates that young people living in the Highlands and Islands are now more likely to intend to live and work in or would prefer to live and work in the region, and so are more likely to be retained.

**Figure 3.1: Self-identification of young people**

Source: ekosgen survey of young people, 2018 (n=2,539)

3.5 Amongst respondents living in the Highlands and Islands, committed stayers (55%) and reluctant leavers (15%) represent a combined total of 70%. This is an increase on the 2015 findings (43% committed stayers and 13% reluctant leavers), which suggests that efforts to retain young people in the region may be starting to pay dividends.



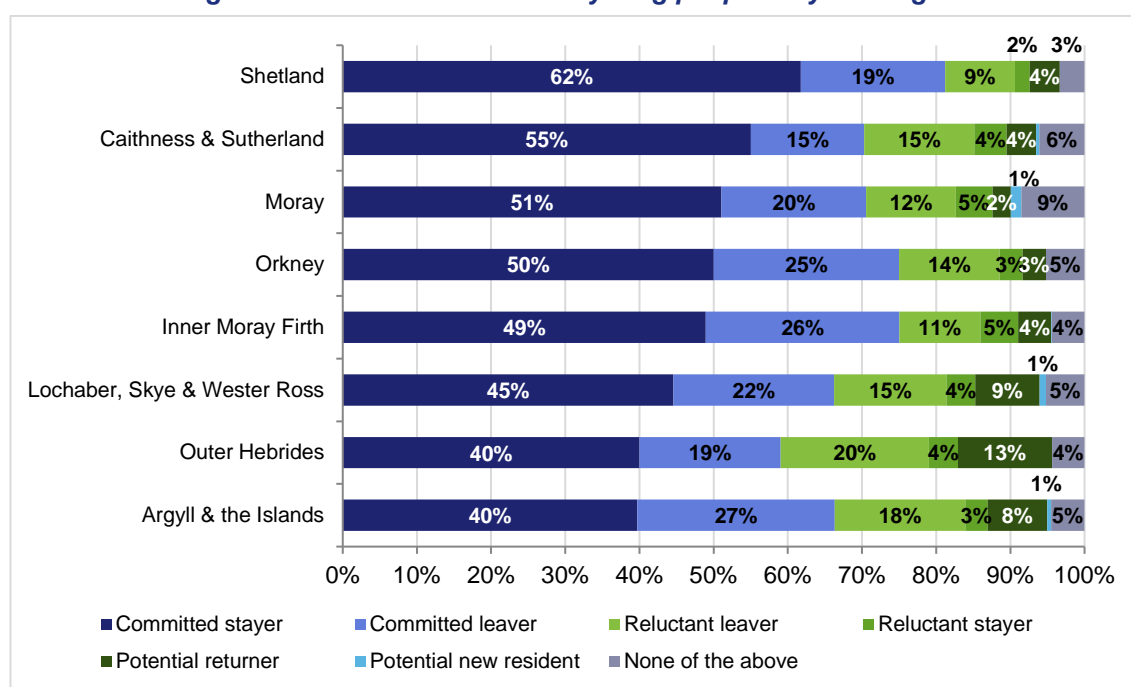
3.6 There is no significant gender difference in terms of how the young people in the study identify themselves.

### Geographic variations

3.7 In all areas, most respondents intend to or would like to stay in the region. More than half of respondents were committed stayers in Shetland (62%), Caithness and Sutherland (55%), Moray (51%) and Orkney (50%). The biggest proportional increases in committed stayers from 2015 were in the Moray (an increase of sixteen percentage points) and Lochaber Skye and Wester Ross (an increase of fourteen percentage points) areas.

3.8 Argyll and the Islands (27%), the Inner Moray Firth (26%) and Orkney (25%) have the highest proportion of respondents who identify as committed leavers, whilst Caithness and Sutherland (15%), Shetland and the Outer Hebrides (both 19%) have the lowest (Figure 3.2).

**Figure 3.2: Self-identification of young people – by sub-region**



Source: ekosgen survey of young people, 2018 (n=2,388)

3.9 The proportion of reluctant leavers has increased in four of the areas since 2015. The largest increase (by proportion) is in the Outer Hebrides (up seven percentage points), followed by Argyll and the Islands (up six percentage points), whilst Orkney increased by five percentage points and Moray by three percentage points. There are often less tangible reasons why young people might move, or not move from rural communities to more populated areas. One young person from a rural area commented that moving away is almost an expectation:

*"I think because everyone else is, it's pushed in schools and you don't want to be the one left behind." (Young person from Lochaber, Skye and Wester Ross aged 25-30)*

### By type of area

3.10 Young people in fragile areas are more likely to want to stay locally to live, work and study. The 2015 Attitudes and Aspirations research highlighted that young people in fragile areas tended to have a stronger sense of connection to their community. It appears that this affinity remains strong. A smaller proportion of young people in fragile areas are committed leavers (19%) than in non-fragile areas (22%). However, while similar proportions want to stay (around 6 in 10 are committed stayers or reluctant

leavers), less feel they can in fragile areas – 17% are reluctant leavers as opposed to 12% in non-fragile areas).

## By age

3.11 Young people at the older end of the age bracket (i.e. those aged 25-30) are more likely to want to stay in the Highlands and Islands than people in the *younger* age categories. There are marked variations by age, with just over a quarter (28%) of school age young people identifying as committed stayers, rising to almost two thirds (63%) amongst 25-30-year olds.

3.12 As in 2015, school pupils are more likely to see themselves as committed leavers, with 42% planning to live and study or work elsewhere. However, this proportion has fallen in the past three years from 56%. This indicates that young people who are still at school are less likely to leave the region than school pupils in 2015, perhaps demonstrating a shift in attitudes among this younger age group.

## Potential returners and potential new residents

3.13 This section covers young people currently living outside the Highlands and Islands, who have either lived there previously and would like to return (potential returners) or have not lived there but are interested in doing so (potential new residents).

3.14 Three quarters (174 people) of all respondents currently living outside the region identified as potential returners. This proportion has increased threefold since the 2015 survey which points to a marked increase in interest in, and attraction to, living in the region by young people from the Highlands and Islands but living elsewhere. Females are more likely than males to be potential returners, and twice as many people from fragile areas than non-fragile areas are interested in returning to the Highlands and Islands.

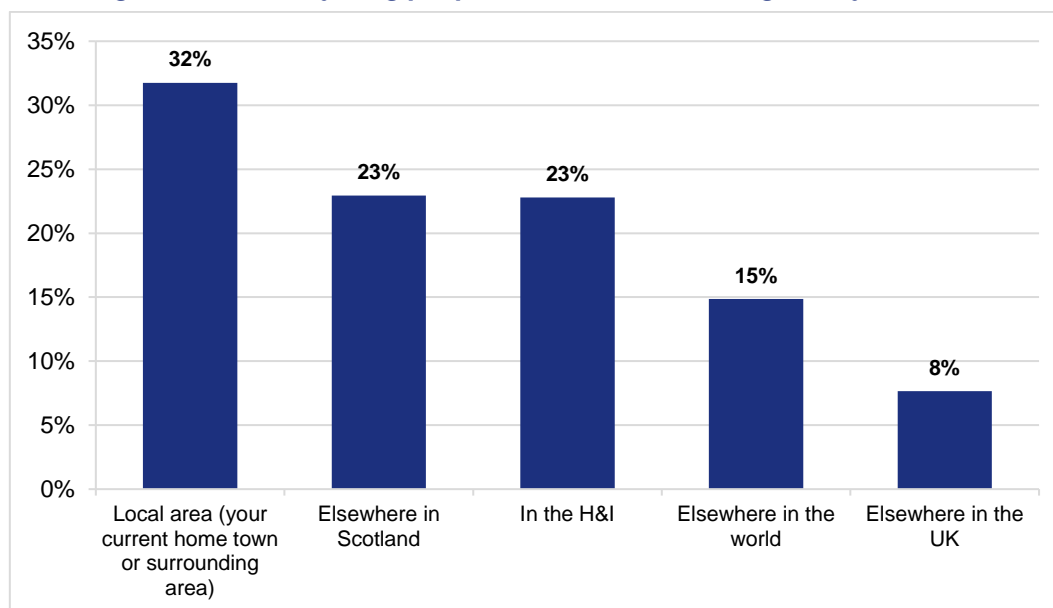
3.15 A quarter of respondents living outside the Highlands and Islands (and who have never lived there before) identify themselves as potential new residents, (57 young people in total). This is a decline from 2015 when 40% of respondents living outside the region, and who had never lived there, reported an interest in returning.

3.16 In 2018, most potential new residents (80%) are aged 24 years and under, which may suggest an interest in the region as a place to study.

## Future plans

3.17 Figure 3.3 shows that most young people see themselves living somewhere in Scotland 10 years from now. Around a third (32%) anticipate living in their local area and almost all (96%) of these are currently living somewhere in the Highlands and Islands. A further 23% of all respondents anticipate living *somewhere* in the Highlands and Islands, suggesting that over half (54%) of all young people see themselves living somewhere in the region by 2028.

3.18 Young people living in Shetland (69%) are the most likely to see themselves living in their area or elsewhere in the Highlands and Islands in 10 years' time, followed by those in the Outer Hebrides and Lochaber, Skye and Wester Ross (both 60%).

**Figure 3.3: Where young people see themselves living in 10 years' time**

Source: *ekosgen survey of young people, 2018 (n=2,523)*

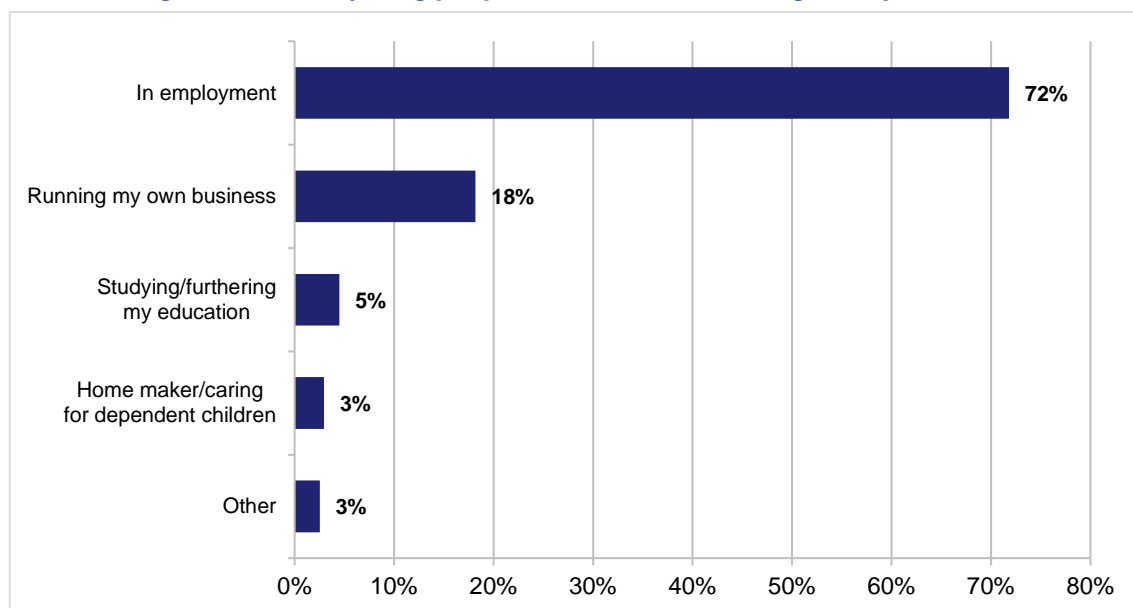
3.19 Almost three quarters (72%) of young people anticipate being in employment in 10 years' time (Figure 3.4), with slightly more males (74%) than females (71%) expecting to be employed. Around a fifth (18%) expect to be running their own business, although this varied substantially across the region ranging from 13% in Orkney to 23% in Lochaber, Skye and Wester Ross.

3.20 Young people at the older end of the age bracket are more likely to consider running their own business as an employment option (21% of 25-30-year olds as opposed to 14% of 15-18-year olds). A number of factors could be at play here – a greater understanding of the jobs market and its limitations, wider experience to help identify an opportunity, better access to finance and more confidence and skills to set up and run an enterprise. This might indicate that more awareness and support is needed around entrepreneurialism among young people.

3.21 Young people in fragile areas (22%) are more likely to see self-employment as an option than those in non-fragile areas (18%). It is not clear whether this is because of a lack of local employment opportunities or whether young people in fragile areas are more exposed to people and role models who work for themselves and so more receptive to it as a viable option. It is very likely to be a blend of these push and pull factors.

3.22 Unsurprisingly (given the age range of respondents), only 5% of young people anticipate being in Further or Higher Education (FE or HE) in 10 years' time. Of this 5%, three times as many females expect to be studying than males. Reluctant stayers are most likely to think they may be in HE or FE 10 years from now (9%) and are also the least likely to expect to be working. This may reflect a lack of confidence in career opportunities in the Highlands and Islands.

**Figure 3.4: What young people see themselves doing in 10 years' time**

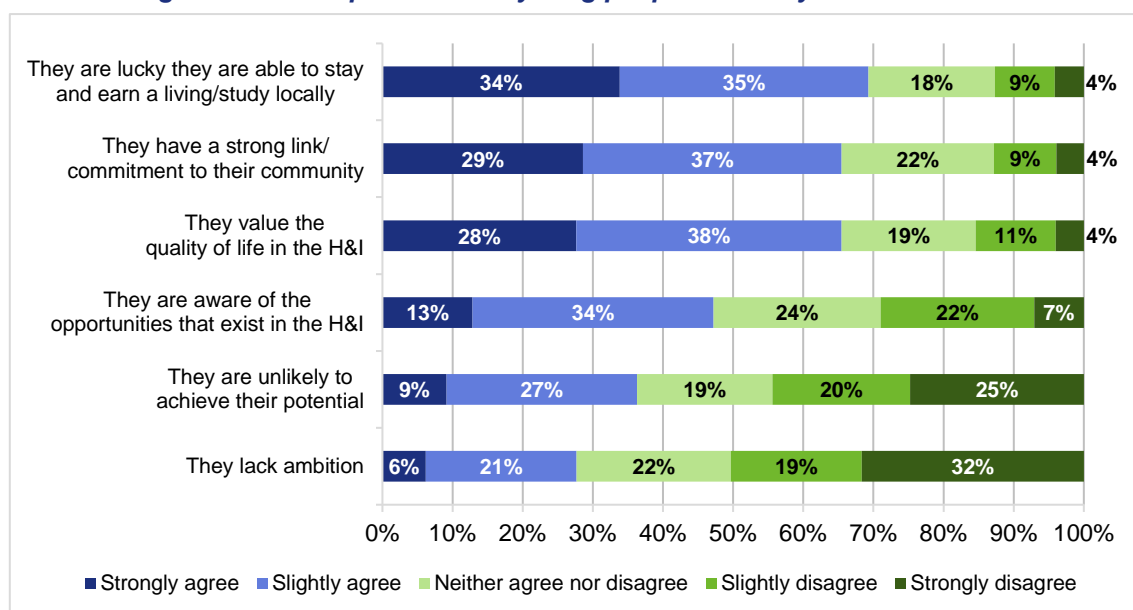


Source: ekosgen survey of young people, 2018 (n=2,526)

## PERCEPTIONS OF STAYERS AND LEAVERS

3.23 This section discusses young peoples' perceptions of other young people's choices on whether to stay or leave the region and how this has changed over time.

**Figure 3.5: Perceptions about young people who stay in the local area**



Source: ekosgen survey of young people, 2018 (n=2,527)

## Views on stayers

3.24 Since 2015, young people's perceptions of other young people who stay in the Highlands and Islands have become more positive and less negative (Figure 3.5). The proportion of respondents who agree that people who stay are lucky to be able to work or study locally increased from 62% in 2015 to 69% in 2018. Less than a quarter (24%) strongly agreed with this in 2015, increasing to more than a third (34%) in 2018. Young people aged 25-30 were most likely to agree or strongly agree that young people are lucky to be able to stay. Supporting this shift in attitude, there has been a fall in the proportion

of young people who believe that those who choose to stay lack ambition or are unlikely to achieve their potential (27% and 36% in 2018 respectively compared to 34% and 39% in 2015).

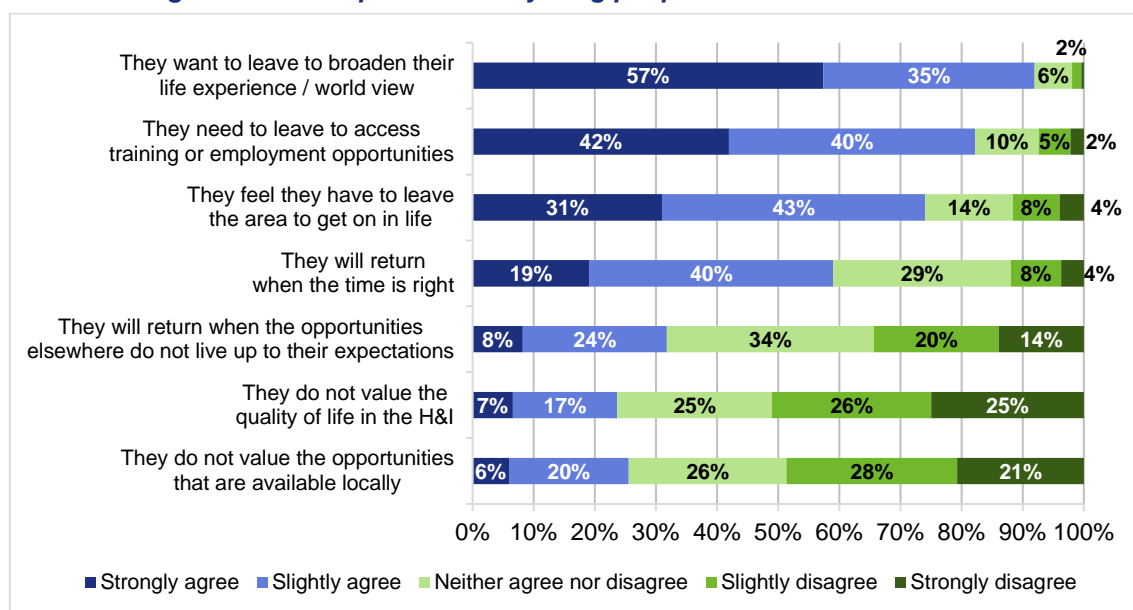
3.25 There is greater agreement that those who stay have strong links and commitment to the local community, and value the quality of life (both 66%) than in 2015 (54% and 58% respectively), which demonstrates another attitudinal shift. It indicates that factors other than economic or employment decisions have become more important to young people. There are no significant differences between the responses of males and females.

## Views on leavers

3.26 The vast majority of young people (92%) believe that people who leave their local area want to broaden their life experience and world view (Figure 3.6). There was broad agreement that leavers often do so to pursue education and employment opportunities. These views are illustrated by the following comment from a young person living in the Highlands and Islands:

*“... I think I was keen to leave home to gain independence and experience city living for a while so while I was intrigued by the education opportunities at home, I'm not sure I could have been convinced to stay. However, in hindsight I think I would have enjoyed staying at home to study more and would have got just as much out of the experience as I did moving away.” (Young person from Lochaber, Skye and Wester Ross aged 19-24)*

**Figure 3.6: Perceptions about young people who leave the local area**



Source: ekosgen survey of young people, 2018 (n=2,523)

3.27 The majority (59%) believe that leavers will return to the region when the time is right, with just 12% disagreeing that leavers will return. There was less certainty about whether people would return when opportunities elsewhere did not live up to their expectations. Around a third (32%) felt they *would* return, with equal proportions (34%) either disagreeing or not aligning with either view.

3.28 Interestingly, even those young people who would prefer to stay in the region are conflicted about why people leave the Highlands and Islands. One young island resident commented that:

*“I love living here, but I am not satisfied with the employment opportunities for young people so I have to move away to progress (which just now, I can't see happening in the near future). It's a vicious cycle. I'll end up having to stay, with a job with no opportunity to progress and that is currently going through pay cuts. I'm scared that I'll end up being*

*unhappy and hating where I'm from because of this.” (Young person from the Outer Hebrides aged 19-24)*

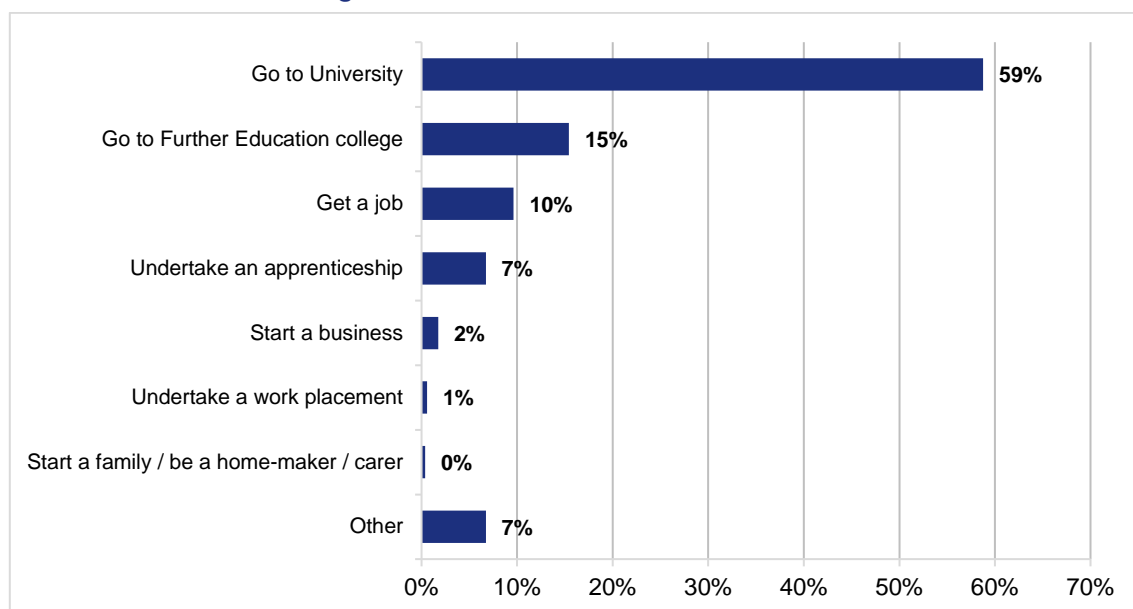
## ASPIRATIONS OF SCHOOL PUPILS

3.29 The most common aspiration reported by school pupils is to enter FE or HE (Figure 3.7), with almost three quarters (74%) wanting to do so – a slight increase on the 2015 figure of 72%. The proportions vary by geography, from 63% in Shetland to 81% in Caithness and Sutherland.

3.30 In terms of FE/HE, most school pupils reported a preference for university, although this ranged from 41% in Shetland to 69% in Caithness and Sutherland. Females are much more likely than males to want to go to university at 69% and 43% respectively. Male school pupils are more likely than females to aspire to an apprenticeship (12% vs 4%) or a job (15% vs 7%).

3.31 Young people living in non-fragile areas (17%) are more likely to hope to enter employment on leaving school than their counterparts in fragile areas (10%) either by taking up a job or an apprenticeship. A greater proportion (79%) of school pupils in fragile areas than non-fragile areas (73%) want to go to university or college when they leave school.

**Figure 3.7: Destinations of school leavers**

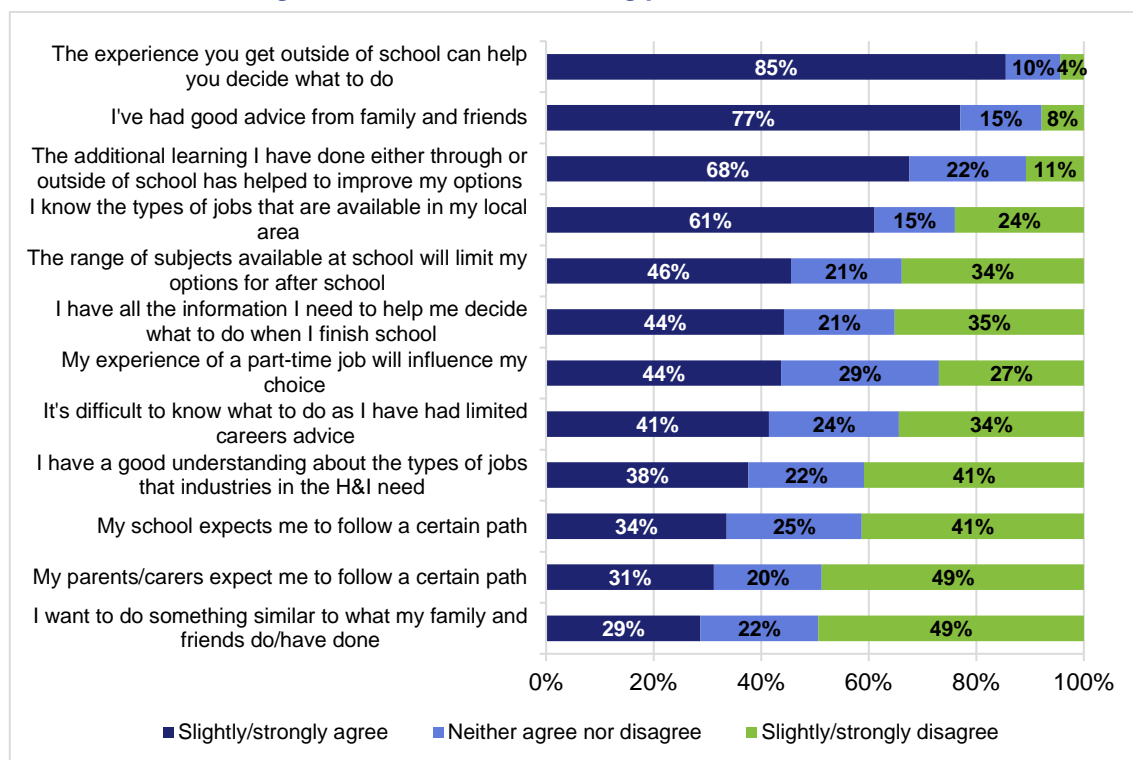


Source: *ekosgen survey of young people, 2018 (n=519, asked of all school pupils)*

## INFLUENCING FACTORS

3.32 The survey findings indicate that factors external to school (i.e., experiences outside of school – 85%, and advice provided by family and friends – 77%) are the most important factors influencing young peoples' decisions about what to do when they leave school (Figure 3.8). More young people (63%) living in non-fragile areas than fragile areas (53%) felt that the additional learning both carried out inside and outside of school helped to improve their options on leaving school.



**Figure 3.8: Factors influencing post-school choices**

Source: *ekosgen survey of young people, 2018 (n=522, asked of all school pupils)*

3.33 Knowledge and understanding of the types of jobs that are available locally is also, and understandably, very important in the decisions that young people make. Awareness of employment opportunities is reasonably high amongst young people with 61% saying that they know about the jobs that are available locally. However, there is less understanding about the specific types of jobs that industries in the Highlands and Islands *need* (38% agree they have an understanding while 41% disagree). Awareness is higher amongst young people living in non-fragile areas (38%) than in fragile areas (29%).

3.34 Committed stayers report a better understanding about jobs that industries in the Highlands and Islands *need*, and more awareness of the types of jobs that are *available* in their local area (43% and 67% respectively) than committed leavers (33% and 62%). Increasing the knowledge about the demand for skills and availability of jobs in the Highlands and Islands could encourage more young people to consider staying in the region once they leave school.

3.35 The perceived limitations of careers advice may be a factor in this with 41% of young people agreeing that inadequate careers advice makes it difficult for them to know what to do when they leave school. This sense of inadequate careers advice ranged from 29% of pupils living in Orkney and Shetland, to almost half (49%) in Lochaber, Skye and Wester Ross, indicating inconsistency in quality across the region. There are clearly important policy and service delivery implications and scope for careers advice and information to be enhanced, particularly in fragile areas. A greater proportion of young people in fragile areas (45%) than non-fragile areas (39%) identified that limited careers advice made it difficult for them to know what to do when they leave school.

3.36 Almost two thirds of school pupils (62%) had a part-time job whilst at school with females more likely to than males to do so (65% and 58% respectively). Of those who work, 44% believe that their experience of part-time work would influence their options on leaving school.

3.37 The majority of school pupils in the Highlands and Islands are happy with the subjects they can study, with 71% citing the range available at school as 'good' or 'very good' (Figure 3.9). Pupils living

in Orkney, and Argyll and the Islands are most likely to be satisfied with their subject choices (83% and 80% respectively), whilst pupils living in Lochaber, Skye and Wester Ross, and Caithness and Sutherland are least satisfied (59% and 61% respectively).

3.38 There is a marked difference in this satisfaction between fragile and non-fragile areas. Only half of pupils from fragile areas consider subject choices as ‘good/very good’ compared to 73% in non-fragile areas. This suggests that, subject choices are more limited in fragile areas and that opportunities for distance learning that broaden subject choice are not being well communicated, do not significantly enhance provision or are not being taken up. The viability of delivering a wider curriculum may be a barrier but more could potentially be made of online delivery and distance learning. UHI has a range of courses that are available in all schools in the Highland Council region. A common timetable of column choice selections is used across all the schools in the area.<sup>36</sup> College lecturing staff lead each class using the virtual schools network using a combination of Google Hangouts, Video Conference and other virtual learning environments.

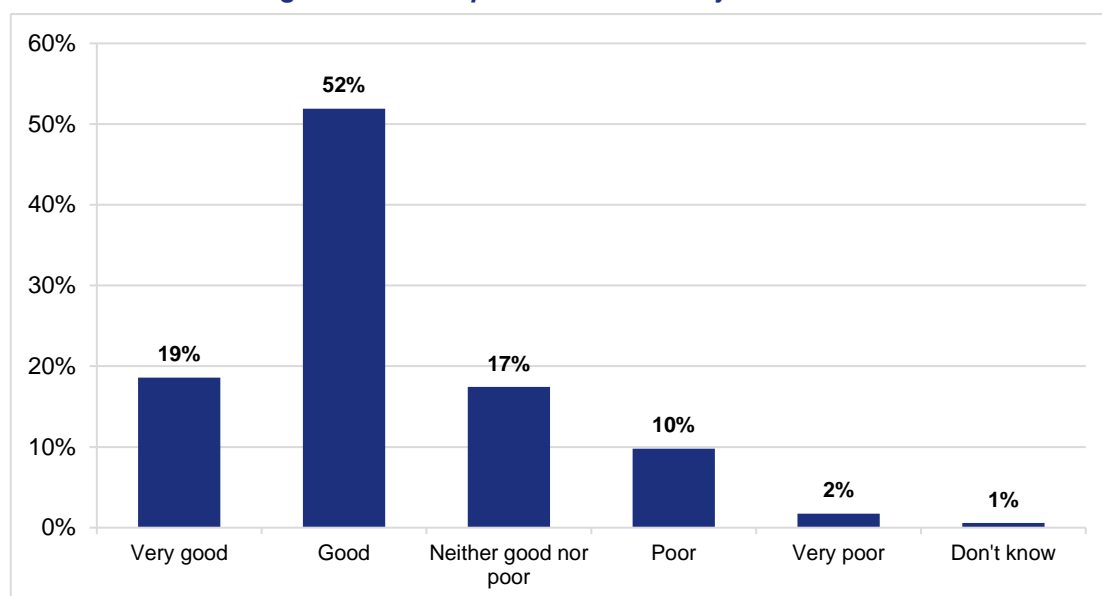
3.39 Almost half of young people (46%) reported that the range of subjects available at school will limit their options on leaving school, rising to 63% in fragile areas.

3.40 Reluctant leavers are more likely to believe that the range of subjects available at school limits their post-school options, suggesting that expanding the choices could make a difference to the longer-term plans of young people in the Highlands and Islands. The following comments support this:

*“I think [it] is probably particularly true for those in my field as further training and exams are required which are more easily accessed in the cities.” (Young person from Lochaber, Skye and Wester Ross aged 19-24)*

3.41 Three in 10 school pupils had no access to any kind of digital delivery (either in school, outside of school, or via online learning) to supplement the subject choices they had at school. Most digital delivery took place in school settings (with 54% receiving digital learning at National 3-5 or SVQ 1-2 level, and 53% at Highers, Advanced Highers, or SVQ 3 level). A relatively small proportion of school pupils accessed other non-digital learning (such as evening classes), most of which (13%, 57 people) were learning at National 3-5 or SVQ 1-2 level.

**Figure 3.9: Perception of school subject choices**



Source: ekosgen survey of young people, 2018 (n=522, asked of all school pupils)

<sup>36</sup> <https://www.whc.uhi.ac.uk/schools/why-choose-a-school-college-partnership-course/virtual-schools/>

## 4 EDUCATION

### Headline messages

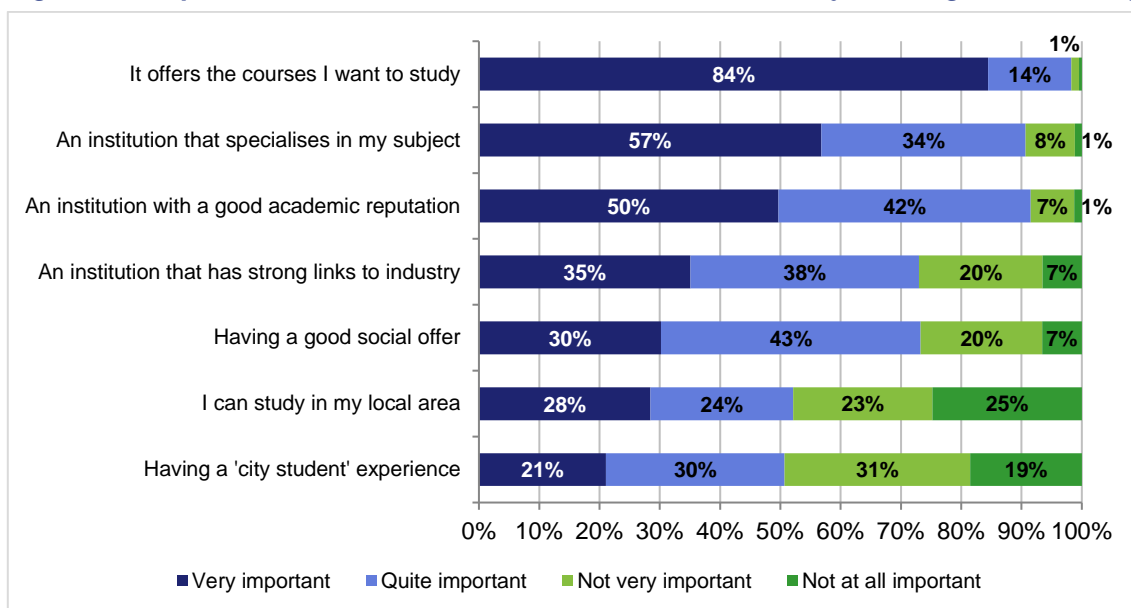
- The expansion of education provision seems to have positively impacted on perceptions of availability and choice.
- Slightly more young people feel the region has a good overall educational offering now, compared with 2015.
- More than half of students responding to the survey from the Highlands and Islands study at a college or university outside the region.
- Overall, young people are more likely to choose a college or university based on the educational offering and reputation, rather than the social aspects, or the proximity of a college or university to the student's home.
- However, those young people who choose to study in the region reported that the cost of studying and being close to friends and family had a bigger influence on their decision than lifestyle, or the quality or reputation of the university or college offerings. For those choosing to study outside the region, gaining independence or a new experience are key factors.
- More than half of young people currently studying in the Highlands and Islands reported barriers to doing so with lack of transport, accommodation and living costs most commonly cited.
- More than half of young people who are from the Highlands and Islands and study outside the region do so because their course is unavailable in the region. Around half of these young people say they would have studied in the region if the course was available, and this is more common amongst those from fragile areas.
- New experiences and gaining a degree of independence are also more influential factors for those who choose to study outwith the region.
- Awareness of the apprenticeship offer is reasonably high and generally recognised as an effective route into employment, although the take-up is relatively low. In common with other parts of Scotland, more needs to be done to enhance understanding about apprenticeships and encouraging participation.

## INTRODUCTION

4.1 This chapter explores the perceptions and aspirations of young people in relation to learning, Further Education (FE), Higher Education (HE), and other pathways into employment.

## AWARENESS OF AND ACCESS TO OPPORTUNITIES

4.2 The main factors affecting young people's decisions to choose a particular FE/HE institution are related directly to the educational offering and reputation, rather than the social aspects, or the proximity of a college or university to the student's home – although these factors are still important for more than half of all young people (Figure 4.1).

**Figure 4.1: Importance of factors in decision about where to study at college or university**

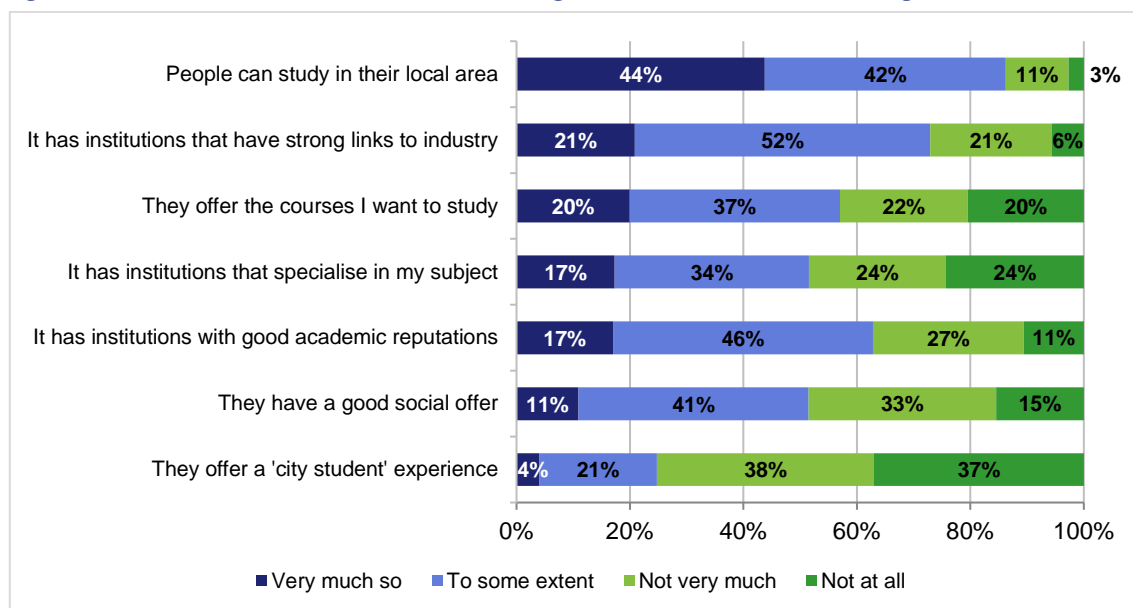
Source: *ekosgen survey of young people, 2018 (n=2,269)*

4.3 There is a mismatch between the factors that influence a young person's decision about where to study, and the ability of FE/HE institutions in the region to meet this expectation. Almost all respondents (98%) identified that offering the courses they wanted was the most important factor in deciding to attend a particular college or university. However, only 57% stated that the courses they wanted to study were available in the region (Figure 4.2). One young person who left the Highlands and Islands to study said:

*"....when I went to uni, staying at home was simply not doable. The courses on par with what I chose to study were not available and the uni experience seemed better in the cities. However, I know there has been a lot more done to the education systems locally since then and more has been done to increase courses." (Young person from Lochaber, Skye and Wester Ross aged 19-24)*

4.4 The findings also indicate that FE/HE institutions in the region are unable to meet expectations regarding subject specialisation, and there is another disparity between what young people see as important, and what the region can provide. Whilst 91% of young people reported that subject specialisation of the institution was important to them, just over half (51%) felt that institutions in the region offered this type of specialisation.

4.5 Nearly three quarters (73%) of young people recognise that the strong links they have to industry is an important characteristic of colleges and universities in the Highlands and Islands region. Where employers and FE/HE institutions build relationships and collaborate, they create alternative pathways and opportunities for people to develop relevant and valuable higher-level skills.

**Figure 4.2: Qualities/characteristics of colleges or universities in the Highlands and Islands**

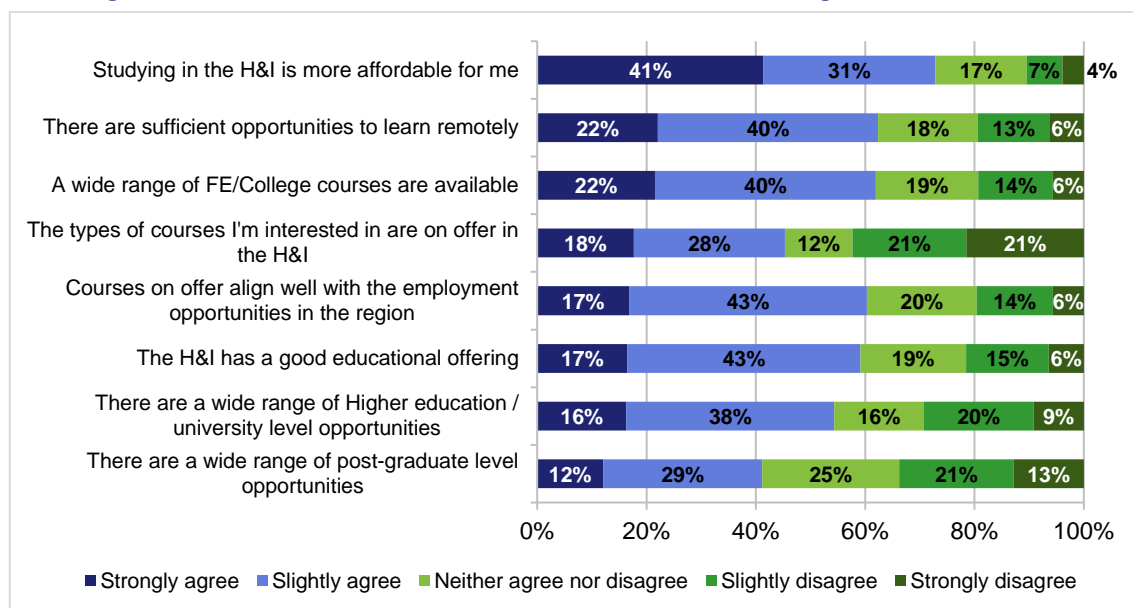
Source: ekosgen survey of young people, 2018 (n=2,264)

4.6 The proportion of young people who feel the region has a good overall educational offering (60%) has increased slightly from 2015 (56%) (Figure 4.3). The uplift likely reflects recent expansion in provision, for example through Inverness College's relocation to the Inverness Campus, through the introduction of new courses, and with strengthened relationships between academia, business and research.

4.7 Almost two thirds of respondents (62%) agree that there is a good range of FE/college courses available in the Highlands and Islands, up from 54% in 2015, reflecting expansion in FE provision in the region.

4.8 A smaller proportion (54%) of young people agree that there is a good range of HE opportunities in the Highlands and Islands, although again, this represents an uplift from 2015 when the proportion was 45%. Provision at UHI and other institutions has expanded, and it is likely that this has impacted on the findings.

4.9 Around two in five young people (41%) agreed that there is a wide range of postgraduate opportunities in the region, up from 35% in 2015. Although awareness of postgraduate opportunities is lower than awareness of both HE and FE opportunities, the uplift in response is encouraging.

**Figure 4.3: Qualities/characteristics of FE and HE in the Highlands and Islands**

Source: ekosgen survey of young people, 2018 (n=2,262)

4.10 Affordability emerged as a significant factor affecting young peoples' decisions to study in the Highlands and Islands. Nearly three quarters (72%) of students agree to some extent that studying in the region is more affordable for them.

4.11 More young people reported that there are opportunities to learn remotely than in 2015, with 62% identifying sufficient opportunities (an increase of 13%). The comment below adds to this:

*"There is a greater variety of courses available than there ever has been up here due to the remote studying strategy the UHI has, delivering courses to all its partners from any one college. As mentioned above it can't be expected to supply every course and many people would prefer to do it down south even if there is an alternative up here simply to experience the city student life." (Young person from Caithness and Sutherland aged 19-24)*

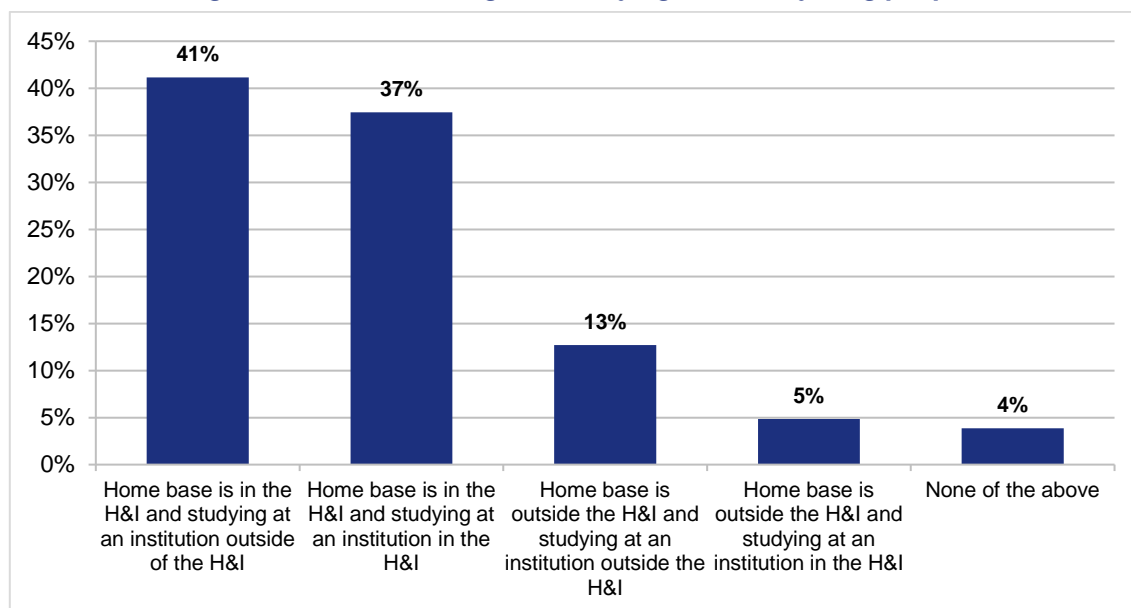
## PERCEPTIONS OF PROVISION

### Studying in the Highlands and Islands

4.12 Whilst most students participating in the research (78%) report that they live in the Highlands and Islands, less than two-fifths of them have a home base in the region *and* study at a college or university in the Highlands and Islands (37%; Figure 4.4). For those living within the region but studying outside, it is likely that although they are studying outside of the region and may be living near their college or university during term time, they have reported 'home' as being in the Highlands and Islands. More than half of respondents studying at institutions in the Highlands and Islands are aged between 19 and 24, and more male respondents (41%) than female (36%) are studying in the region.

4.13 A greater proportion of young people living and studying in the Highlands and Islands are based in non-fragile areas (38%) than fragile areas (32%). The spread of students probably reflects the locations of UHI colleges, with around half of students living in the Inner Moray Firth, Argyll and the Islands, the Outer Hebrides, Caithness and Sutherland and Orkney study locally, compared to fewer than a fifth who live in Moray, Shetland and Lochaber, Skye and Wester Ross.



**Figure 4.4: Current living and studying status of young people**

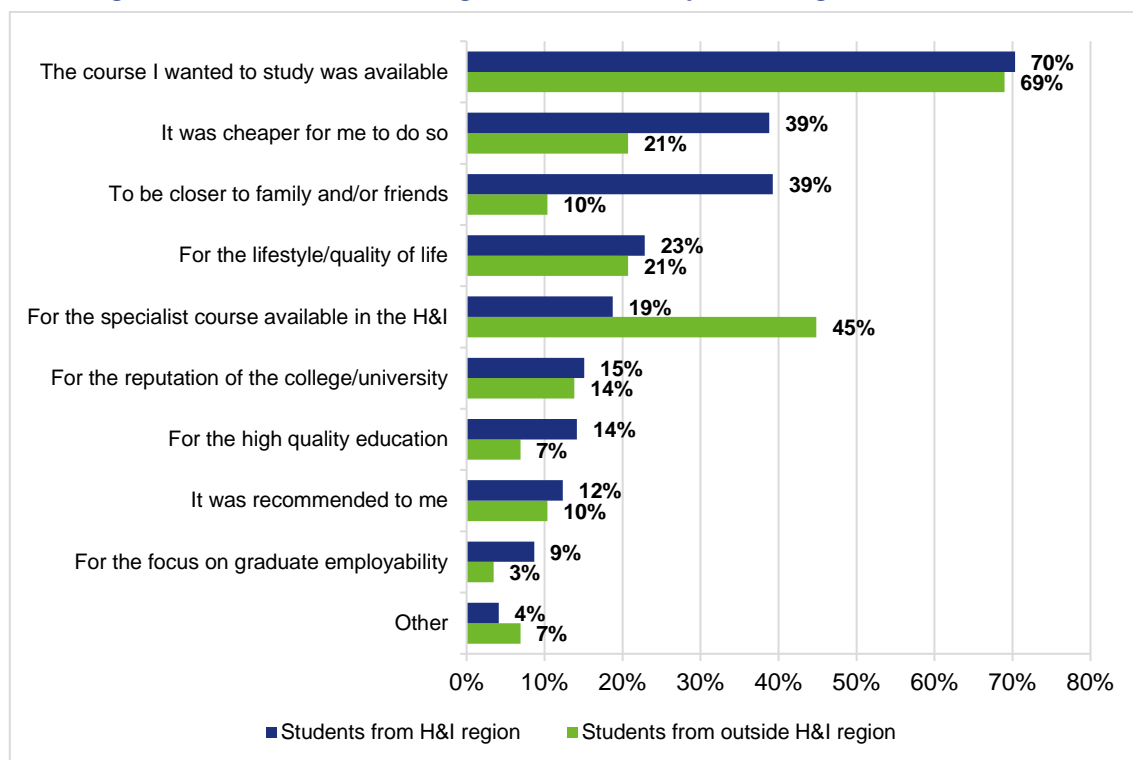
Source: *ekosgen survey of young people, 2018 (n=598, asked of all students)*

4.14 The majority (70%) of students studying in the region chose to do so because of its educational offering (Figure 4.5). More female than male students identified that the course they wanted to study was available (74% and 61% respectively).

4.15 A greater proportion of students from outside the Highlands and Islands region than within it (45% and 19% respectively) chose to study there because of the availability of a specialist course in the region (though it should be noted that this is drawn from a relatively small sample size). A similar proportion (14%) of students from outside the region opted to study there because of the reputation of the college or university (15% of those from the region). This is a positive finding and reflects the significance of both the FE and HE offerings in the Highlands and Islands.

4.16 There are several recent examples of this expanded educational provision, especially in the healthcare sector. A shortened midwifery programme<sup>37</sup> has been developed enabling nurses in the region to become fully qualified midwives in 20 months. The programme (being delivered in conjunction with NHS Highland and NHS Western Isles) will be available to local registered adult nurses, and those from further afield who wish to study at UHI and then work in the region. UHI is also developing a BSc degree in optometry to address the growing demand for eyecare services in the region. This is part of the university's wider plans to develop a School of Health, Social Care and Life Sciences. These, along with other initiatives and activities have boosted perceptions, and indeed the reality of the educational offer in the region.

<sup>37</sup> <http://www.nhshighland.scot.nhs.uk/News/Pages/Fasttrackmidwifeeducation.aspx>

**Figure 4.5: Factors influencing decision to study in the Highlands and Islands**

Source: *ekosgen survey of young people, 2018 (n=219 for students from H&I region, n=29 for students from outside H&I region)*

4.17 The availability of courses was viewed more positively by students currently living in fragile areas, and students living in the Outer Hebrides, Shetland, and Lochaber, Skye and Wester Ross. Illustrating this a postgraduate student living in the Highlands and Islands commented:

*"I moved south to Glasgow to study for an undergraduate degree in the city before returning to the Highlands upon completion. The single reason this was possible was the University of the Highlands and Islands offering postgraduate study. I wanted to carry on studying but back home in the Highlands and this was possible through UHI. The course with UHI wasn't a quick or easy option to return to the Highlands, it was exactly what I wanted to do and a course of the same calibre would be difficult to find elsewhere."*  
(Young person from Caithness and Sutherland, aged 25-30)

4.18 However, not all young people are able to study the subjects they want at the right level in the region and some have very limited options when it comes to accessing the qualifications they want to work towards. One young person acknowledged that whilst they were fortunate in being able to live and study in the region:

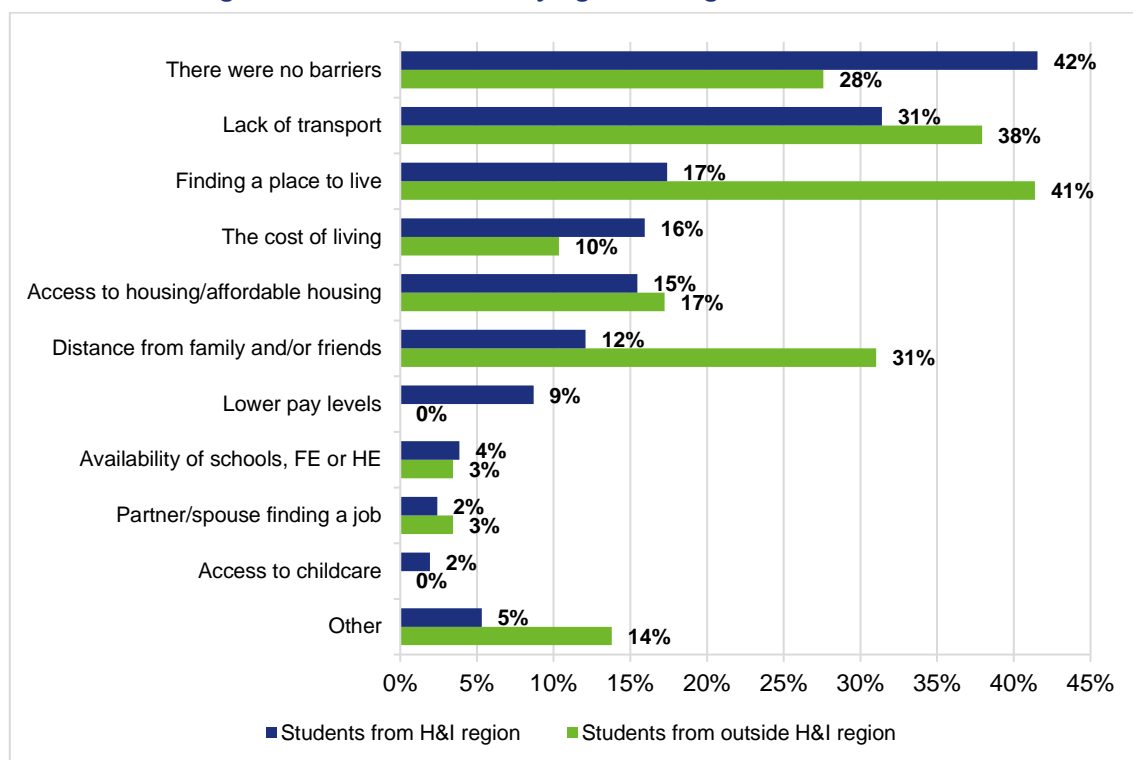
*"...if there's no UHI centre in your area it makes it very hard to stay in your local area."*  
(Young person from Lochaber, Skye and Wester Ross aged 25-30)

4.19 The proximity of family and friends and affordability are bigger influences in terms of studying in the region than lifestyle or quality or reputation of the university or college offerings. At 45%, females are slightly more likely than their male counterparts, at 41%, to want to be closer to family and friends. Committed stayers (45%) are more than twice as likely as committed leavers (19%) to cite proximity to family and friends as a factor in choosing to study in the region. The affordability of studying in the Highlands and Islands was slightly more important for students from fragile areas (42%) than those from non-fragile areas (39%).

4.20 Despite the factors that encourage young people to study in the Highlands and Islands, more than half of young people currently attending HE or FE institutions in the region report barriers (Figure 4.6). The most commonly cited are lack of transport, as well as housing issues and living costs.

4.21 Transport and housing issues are the main barriers reported in the responses from those students who are not from the Highlands and Islands region.

**Figure 4.6: Barriers to studying in the Highlands and Islands**

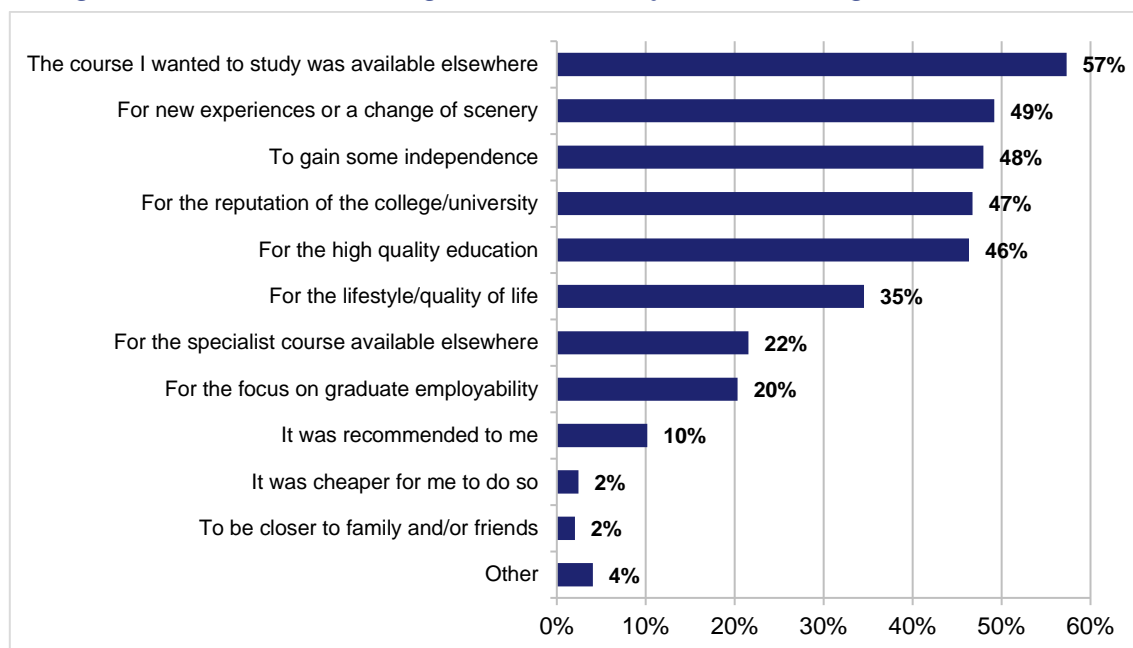


Source: *ekosgen survey of young people, 2018 (n=207 for students from H&I region, n=29 for students from outside H&I region)*

## Studying outside the Highlands and Islands

4.22 More than half (52%) of students who report that they live in the Highlands and Islands study outside the region. A higher proportion (65%) of students from Moray, the Outer Hebrides, and Lochaber, Skye and Wester Ross pursue their education at an institution outside the Highlands and Islands.

4.23 The most common reason for studying outside the region is to undertake a course that was available outside the Highlands and Islands (Figure 4.7). Additionally, just over a fifth (22%) of students studying outside the region stated that they opted to do so because of a specialist course that was available outside the region. Of those who reported these two factors as influencing their decision to study outside the region, the vast majority (91%) stated that their course was not available in the Highlands and Islands, or that they were unsure of its availability. This points to ongoing gaps in provision at both FE and HE level.

**Figure 4.7: Factors influencing decision to study outside the Highlands and Islands**

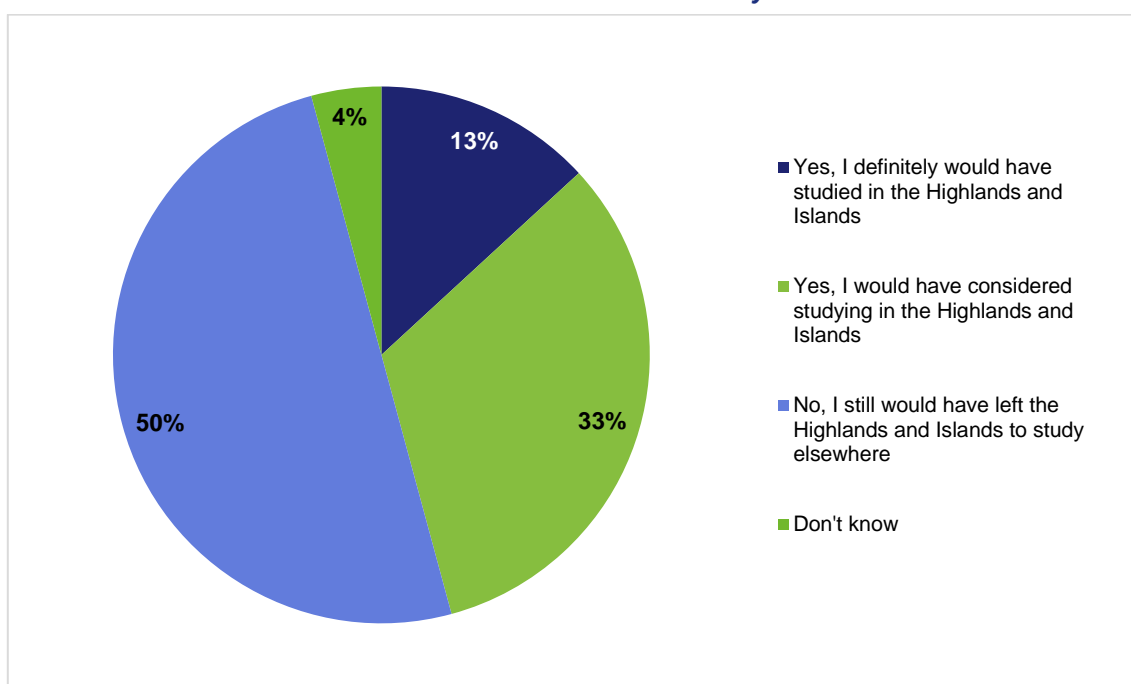
Source: *ekosgen survey of young people, 2018 (n=246, asked of those who have moved outside H&I for study)*

4.24 Almost half of the young people studying outside the Highlands and Islands chose to do so to access new experiences and a change of scenery (49%) and gain some independence (48%). This was expanded on in the online focus groups, with one young person commenting:

*"It seems many young people up here definitely want to have a "city experience" in their lives, and university is a perfect time to do this. I don't think I'd appreciate living here nearly as much if I had never lived in a big city before; I imagine it would be easy to take the things that make the Highlands and Islands great for granted if you've always lived here." (Young person from Orkney aged 25-30)*

4.25 This drive to leave the Highlands and Islands region for reasons unrelated to the availability of courses and the quality of education is illustrated in Figure 4.8. Half of young people studying outside the region stated that even if their course had been available in the Highlands and Islands, they would still have left the region to study elsewhere. A greater proportion of male students (62%) than female (47%) said that course availability had no bearing on their decision to stay. It is also worth noting that 46% of young people would definitely have studied in the region (13%), or would have at least considered it (33%), stressing the importance of having a wider offering.

**Figure 4.8: Influence of course availability in the Highlands and Islands on decision to move for study**



Source: *ekosgen survey of young people, 2018 (n=190, asked of those who have moved outside H&I for study)*

4.26 Given that there are more students from fragile areas studying outside the region, it is perhaps unsurprising that a slightly greater proportion of students from these areas would have considered studying in the Highlands and Islands region if their course had been available (39% vs 31% of students from non-fragile areas).

## ENABLING EMPLOYMENT AND CAREER OPPORTUNITIES

4.27 The research explored young people's awareness and understanding of the apprenticeship family, their access to employment and career opportunities, and the effectiveness of the apprenticeship family and student placements as a route into employment.

### Awareness of employment and career opportunities

4.28 Whilst the majority of young people are aware of modern, graduate and foundation apprenticeships, a much smaller proportion appear to be interested in undertaking them or have or are doing so. This may point to a negative perception amongst young people of apprenticeships as a route to qualification and employment, but it is not unique to the Highlands and Islands region. There is a wider acknowledgement that apprenticeships are often still viewed as a fall-back option, with young people and their influencers often seeing them as a 'Plan C'.

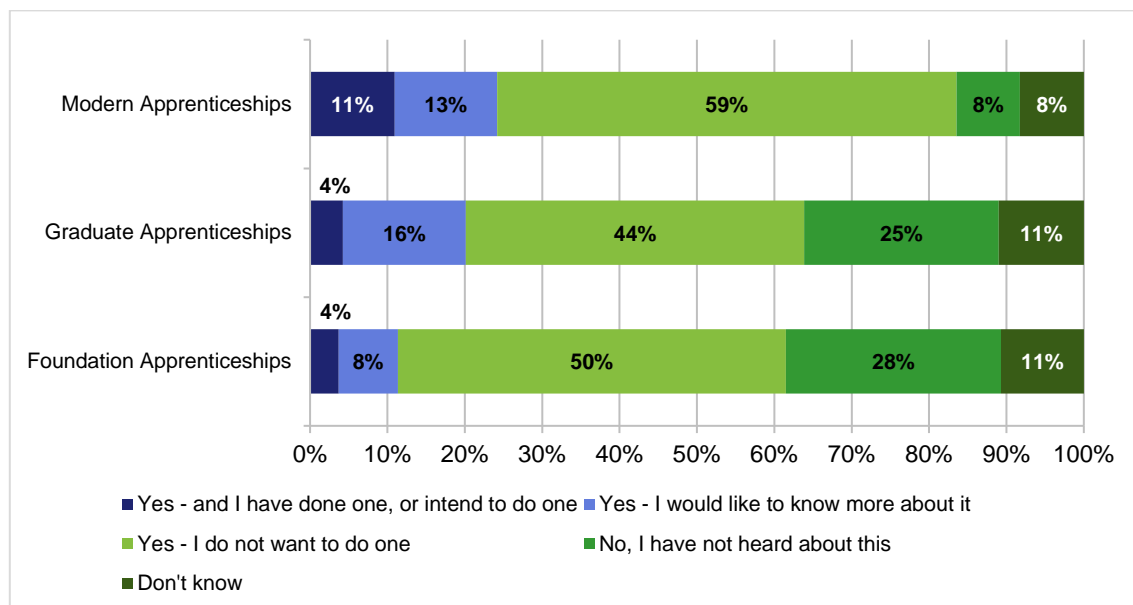
4.29 In comparison to Modern Apprenticeships (MAs), figure 4.9 demonstrates the relatively low awareness levels that young people have about Foundation and Graduate Apprenticeships, with 36% of young people unaware of Graduate Apprenticeships and 39% unaware of Foundation Apprenticeships as routes into employment.<sup>38</sup>

4.30 There is a marked gender difference when it comes to attitudes towards MAs. A third of males reported an interest in MAs compared to only one in five females. This broadly reflects the gender balance of MA starts across Scotland. There was also greater interest amongst the 15-18 and 19-24-

<sup>38</sup> These figures combine both "No, I have not heard about this" and "Don't know" responses.

year-old age groups than 25-30 years, again reflecting the fact that the majority of MA starts in Scotland are by young people aged 16-24.

**Figure 4.9: Awareness and understanding of apprenticeships**



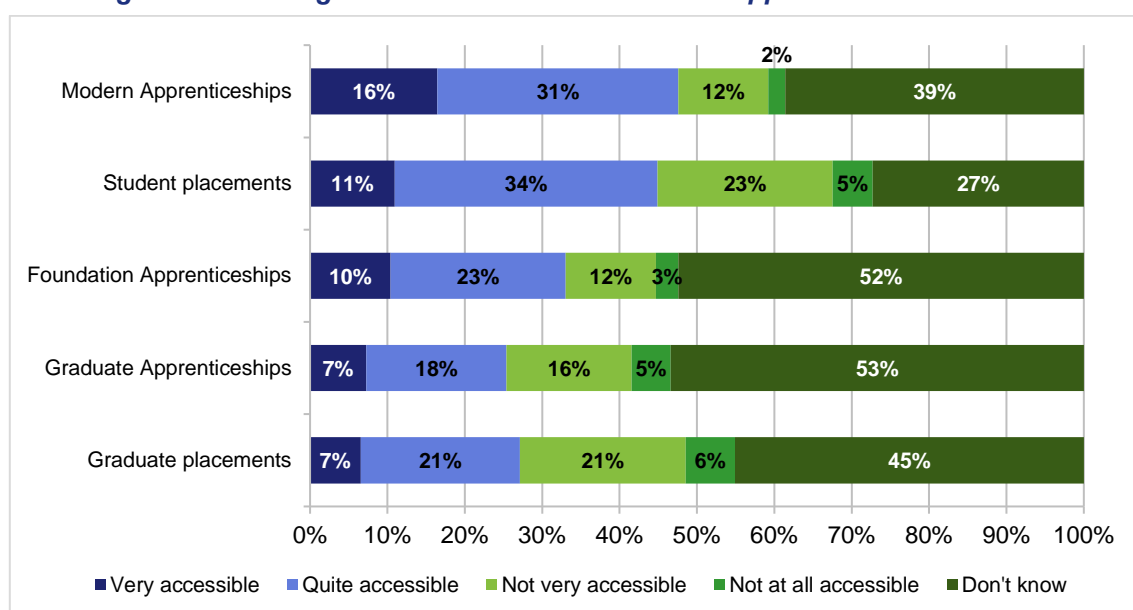
Source: ekosgen survey of young people, 2018 (n=2,255)

## Access to employment and career opportunities

4.31 Of the apprenticeship family, MAs are viewed as the most accessible to young people (47%), whilst Graduate Apprenticeships are the least accessible (Figure 4.10). In terms of placements, student placements are more accessible than graduate placements.

4.32 People in the youngest age group (15-18 years) report the highest level of knowledge and access to all apprenticeships in the family, which is very likely to be because of the information and advice provided by schools and careers advisers.

**Figure 4.10: Rating of access to education-related opportunities in local area**



Source: ekosgen survey of young people, 2018 (n=2,261)



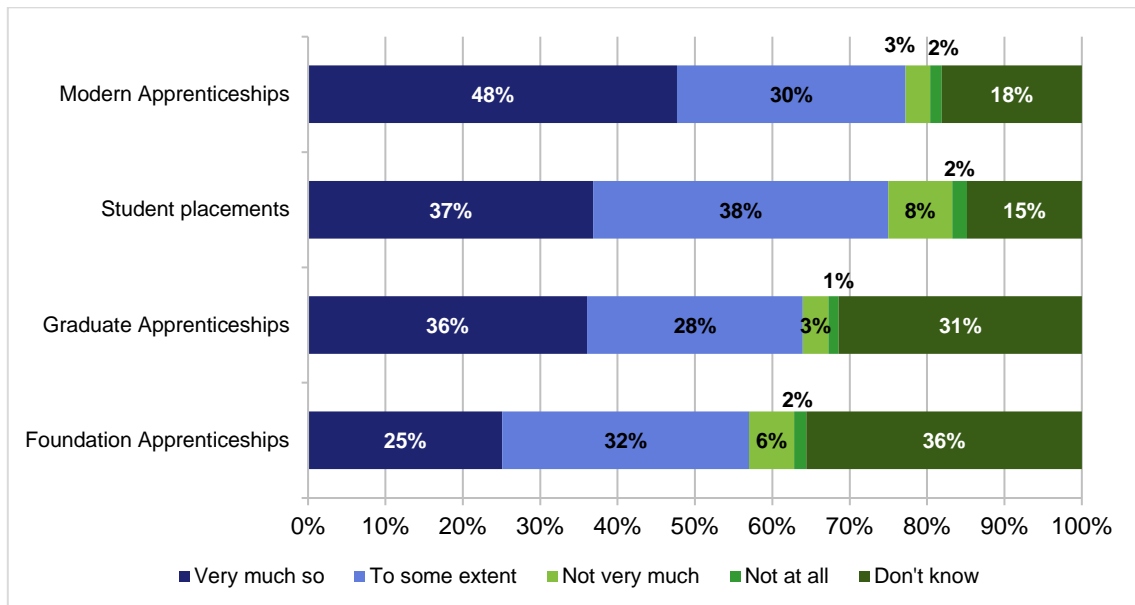
## Effectiveness of employment and career opportunities

4.33 Where respondents felt able to comment, out of all the apprenticeship family, MAs were acknowledged as the most effective route into employment (Figure 4.11), by equal proportions of males and females.

4.34 Of the options listed, the next most effective route into employment (identified by three quarters of young people) is student placements, which was seen as more effective than Graduate or Foundation Apprenticeships. Substantially more females (78%) than males (68%) consider this an effective route. The gender difference might simply reflect that a greater proportion of students are female and so may have more exposure to, and insight into the benefits of student placements.

4.35 Young people who are aware of Graduate and Foundation Apprenticeships consider them to be a valuable route to employment. Three quarters of young people who know about Foundation Apprenticeships believe they are effective and 82% of those who are aware of Graduate Apprenticeships think they are a good route into employment.

**Figure 4.11: Effectiveness of routes into employment**



Source: ekosgen survey of young people, 2018 (n=2,258)

## 5 EMPLOYMENT

### Headline messages

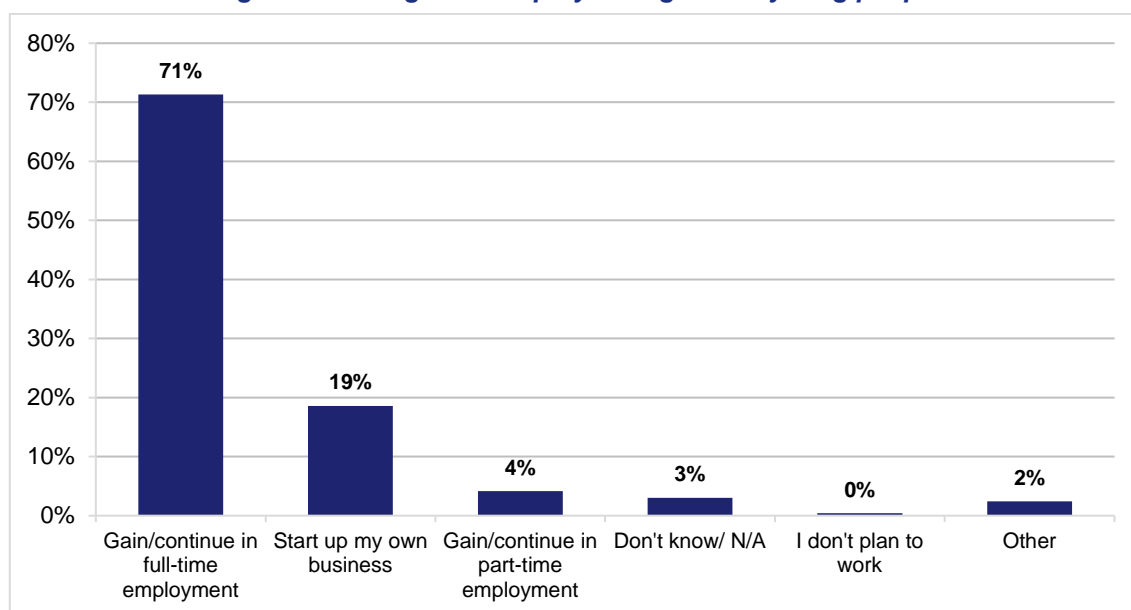
- Most young people in the Highlands and Islands want to work full time, but for nearly 40% a lack of local opportunities is a barrier. This is particularly so for females, those living in fragile areas and 19-24 year olds. Housing, know-how, confidence and experience were also cited as barriers to achieving employment goals by around a fifth of young people.
- There is significant appetite amongst young people to start their own business, and many feel they have the business idea to do so; however access to finance is a barrier for many young people to start-up businesses.
- Young people are most concerned with having a steady job and a good work-life balance. Over half feel that what they are looking for in a job is at least to some extent available in the region, although around one fifth don't know if what they are looking for is available. This group will therefore need more information and guidance on local and regional opportunities.
- Nearly two thirds of all young people in/from the Highlands and Islands want to work in their local area or elsewhere in the region.
- Many young people want to work in the region but feel that there is a lack of employment and career progression opportunities compared to elsewhere, particularly within graduate posts.
- Lack of employment opportunities is a critical issue to be tackled to make the Highlands and Islands more attractive to young people.

### INTRODUCTION

5.1 This section provides an overview of young people's views on employment. It considers their employment goals, their views on enablers and barriers to achieving their career aspirations, what they are looking for in a job and in an employer, and their perception of employment opportunities in the Highlands and Islands.

### EMPLOYMENT GOALS, ENABLERS AND BARRIERS

5.2 In the longer term, most young people in the Highlands and Islands (71%) aspire to full-time employment, with around a fifth (19%) interested in starting their own business (Figure 5.1). This was similar across most demographic factors, although those aiming for part-time employment were more likely to be aged 25 to 30. This perhaps reflects current or anticipated care responsibilities. Young people in Lochaber, Skye and Wester Ross are most likely to aspire to starting up their own business (24%), whilst respondents in Orkney are least likely to do so (11%). Variations may reflect perceived opportunities for being self-employed, a prevalence of self-employment in the area, and a lack of employment opportunities.

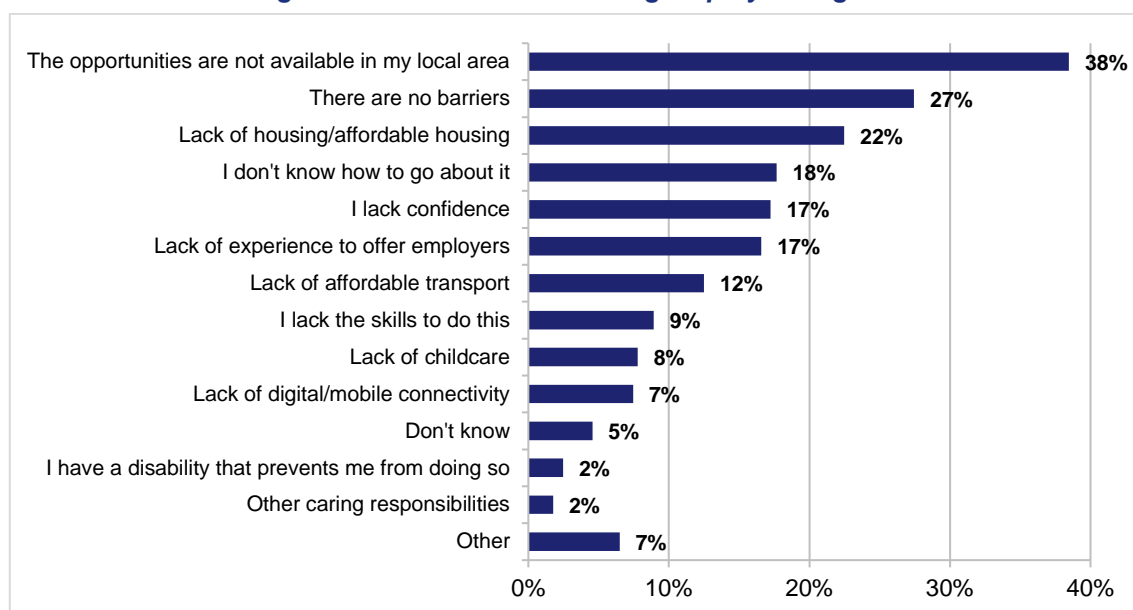
**Figure 5.1: Long-term employment goals of young people**

Source: *ekosgen survey of young people, 2018 (n=2,135)*

5.3 Whilst most young people in the Highlands and Islands wish to pursue full-time employment, lack of opportunities in their local area can be a barrier, as cited by almost two-fifths of respondents (38%) (Figure 5.2). The second most commonly identified barrier to achieving employment goals is a lack of housing/affordable housing (22%). This was followed by lack of knowledge/know-how to pursue goals (18%), lack of confidence (17%) and lack of experience to offer employers (17%). Twenty-seven percent of respondents feel that there are no barriers to achieving their employment goals.

5.4 Respondents in the Outer Hebrides and Caithness and Sutherland were the most likely to identify a lack of opportunities to pursue their employment goals in their local area with just under half (48%) doing so, whilst respondents in Shetland were least likely, at 35%. Respondents in fragile areas are more likely to report a lack of local employment opportunities; 45% did so compared to 38% in non-fragile areas. There is also a noticeable gender difference among responses; 32% of males report a lack of opportunities in their local area and 33% feel there are no barriers at all to achieving their employment goal. In comparison, 41% of female respondents stated that there is a lack of opportunities locally and only 25% feel there are no barriers. Respondents aged 19-24 were most likely to report a lack of opportunities in their local area at 43%, compared to 36% for 15-18 year olds and 35% for respondents aged 25-30.

5.5 Committed stayers are least likely to perceive a lack of opportunities in their local area (28%), whilst, perhaps influencing their belief that they must leave the region, reluctant leavers are the most likely (62%).

**Figure 5.2: Barriers to achieving employment goals**

Source: ekosgen survey of young people, 2018 (n=2,106)

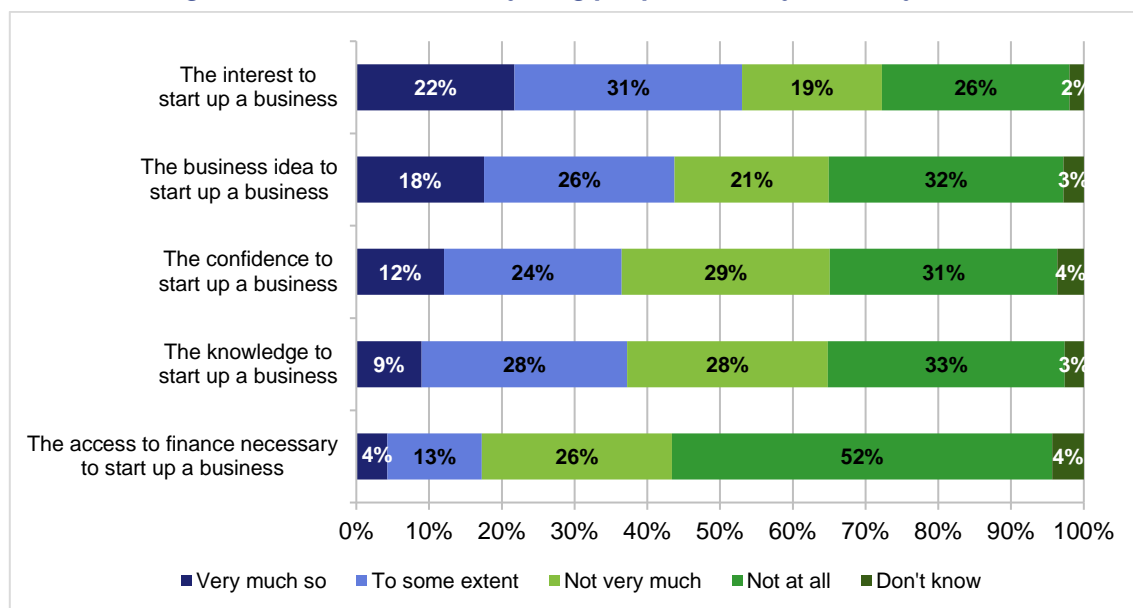
5.6 Availability of employment opportunities in the Highlands and Islands was explored in the online discussion groups. As with the survey, the discussions highlighted a lack of opportunities in the region, particularly in higher paid jobs. The following comment illustrates that whilst there are opportunities in some fields this is not the case across all sectors.

*"I was relatively lucky in being able to find work in the area of my work, post-graduation. I do however know many people who "settle" for work that isn't in their field or with a much lower salary due to the lack of opportunity." (Young person from Caithness and Sutherland)*

5.7 Although full-time employment rather than self-employment was cited by most as a longer-term employment goal, just over half (53%) of respondents expressed some interest in starting up a business and over two-fifths (44%) felt they had the ideas, at least to some extent, to do so (Figure 5.3). Access to finance, however, emerged as a barrier with over half (52%) stating they did not have the necessary finance to set up a business, and a further quarter (26%) had very limited access to finance required. Knowledge and confidence were also barriers – just over a third felt they had the necessary knowledge (37%) or confidence (36%) to establish a business.

5.8 Young people aged 25-30 are more likely to have some interest in, and ideas needed to, start-up a business, compared to those aged 15-18 and 19-24. However, the 25-30 are also more likely to report the finance needed to set up a business as a barrier to doing so. There was also more interest amongst young people from fragile areas in starting up a business (60%) than those from non-fragile areas (52%), although access to finance was again a barrier for both groups.

5.9 When isolating those who expressed some interest in starting up a business, they are more likely to feel they have the ideas (74%), knowledge (52%) and confidence (52%) to do so. Accessing finance to start-up a business, however, was again a significant barrier for this group.

**Figure 5.3: Extent to which young people feel they currently have:**

Source: *ekosgen survey of young people, 2018 (n=2,130)*

5.10 Respondents were asked to comment on what they think employers are looking for in young employees. Figure 5.4 shows that respondents consider a good attitude/work ethic and commitment to the job are essential for employers (85% and 81% respectively). Interestingly only half (50%) feel that relevant qualifications/skills are essential and less than half (45%) believe that experience to do the job is essential.

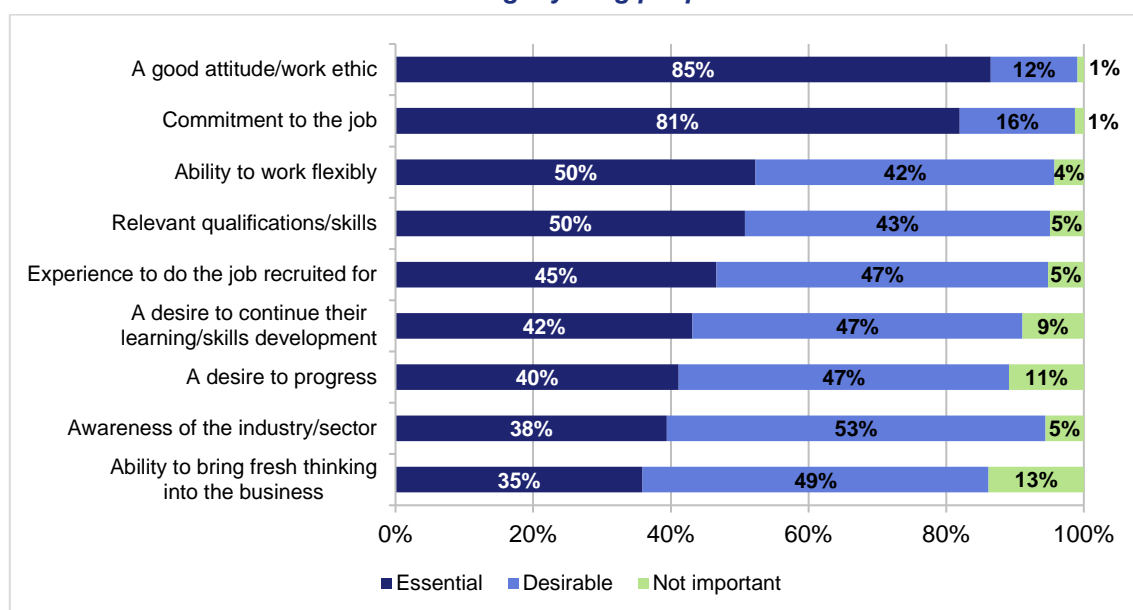
5.11 Some young people's perspectives on employer requirements match with what employers seek when recruiting young talent, and some do not. The HIE Business Panel Survey<sup>39</sup> asked employers what characteristics they looked for when recruiting young talent. The most common response was a good attitude/work ethic (88% of employers), and this was most commonly reported as essential by young people. Similarly, 48% of employers reported that relevant qualifications or skills were a characteristic they looked for when recruiting young people, and 50% of young people felt this was an essential requirement for employers.

5.12 Employers are much more interested in young people who have a desire to continue their learning/skills development (77%), can bring fresh thinking into the business (61%) and have an awareness of the industry or sector (57%) than young people think they are (42%, 35% and 38% respectively).

5.13 In contrast, young people feel that having previous experience to do the job (45% felt this was essential for employers) is much more important to employers than it actually is. Only 24% of employers said that they looked for young people with previous experience.

<sup>39</sup> <http://www.hie.co.uk/regional-information/economic-reports-and-research/archive/hie-business-panel-survey---workforce--skills-and-young-talent.html>

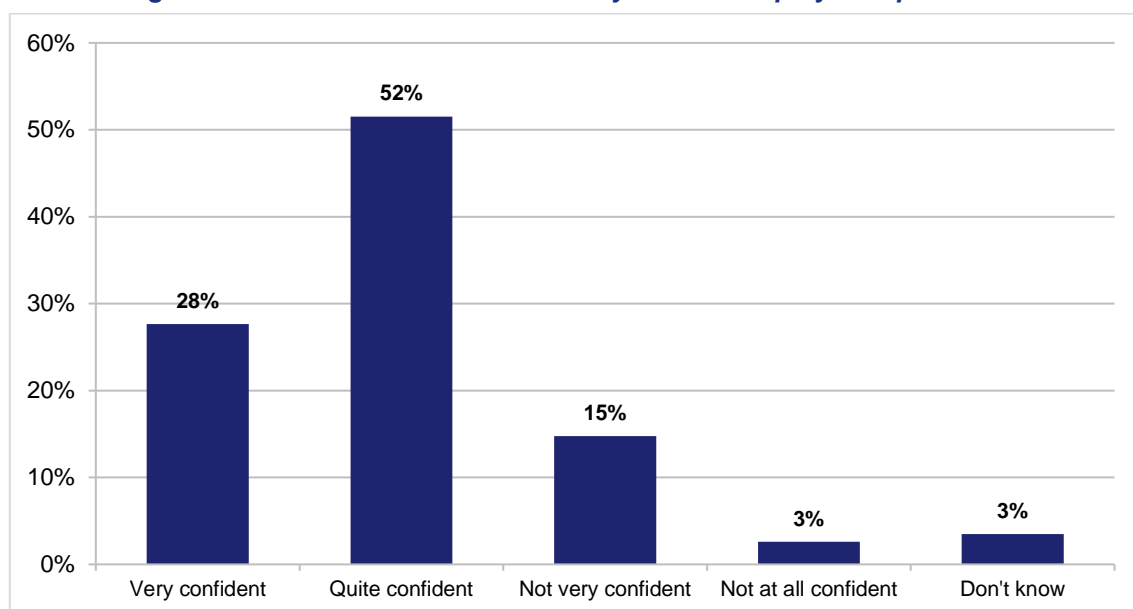
**Figure 5.4: Perspectives on employer requirements of young employees amongst young people**



Source: ekosgen survey of young people, 2018 (n=2,127)

5.14 Most respondents (80%) are very or quite confident that they have the attributes and attitudes that employers are looking for. Not surprisingly younger respondents (those aged 15-18) are less likely to be confident they have what employers are looking for, at 66%. Reluctant stayers are also less confident in their ability to meet employer requirements with just 56% being very or quite confident. Reluctant stayers are more likely to hold lower level qualifications, which may impact their lower levels of confidence.

**Figure 5.5: Confidence in current ability to meet employer requirements**



Source: ekosgen survey of young people, 2018 (n=2,126)

## EMPLOYMENT ASPIRATIONS

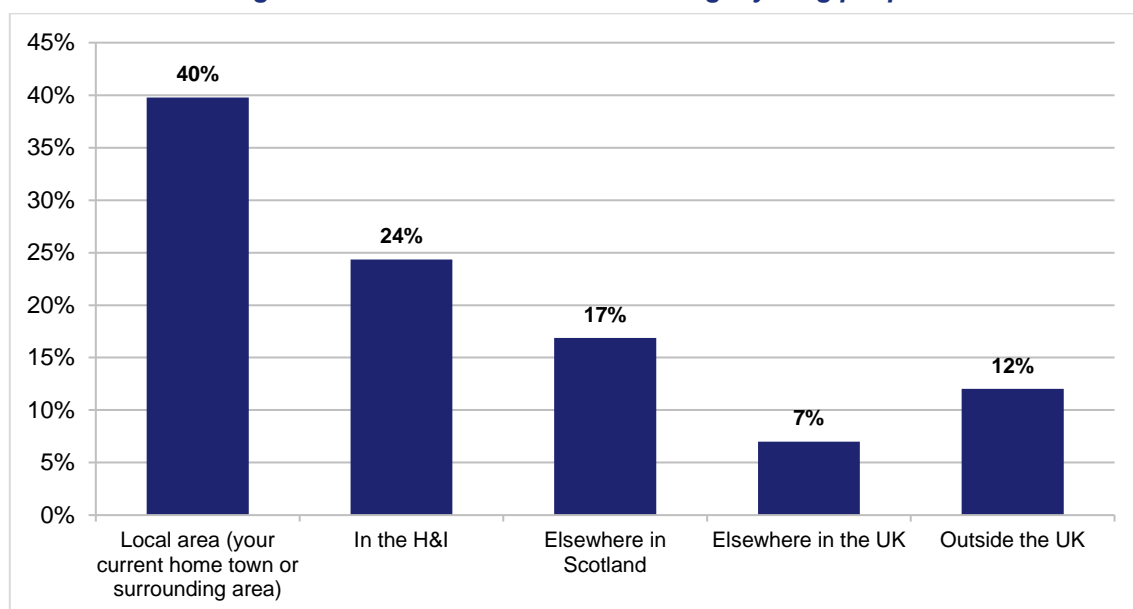
5.15 When asked about their ideal work locations, around two-thirds of young people in/from the Highlands and Islands want to work in the region (Figure 5.6). Two in five (40%) want to work in their local area and a further 24% want to work somewhere else in the Highlands and Islands. This combined



figure of 64% is an increase from the 2015 survey which found that 44% of respondents wanted to work in the Highlands and Islands, suggesting the region is becoming more attractive to young people.

5.16 Young people at the older end of the age band are more likely to want to work in the Highlands and Islands with 81% of 25-30 year olds reporting this compared to 43% of 15-18 year olds. This is likely to reflect their age and stage as 25-30 year olds are more likely to have actively chosen to live in the region and be settled there, and those aged 15-18 are more likely to see themselves as committed leavers. Respondents from Shetland are most likely to want to work in their local area, at 63%, whilst respondents from the Inner Moray Firth are least likely, at 33%. As is to be expected there are significant differences in the aspirations of those who identified as stayers and leavers. The vast majority (91%) of committed stayers want to work in the region, compared with just 15% of committed leavers. Interestingly, only 34% of reluctant stayers want to work in the Highlands and Islands, compared with 71% of reluctant leavers. This suggests that reluctant stayers plan to leave the region at some point, whilst reluctant leavers may plan to return after at some point in the future. Nearly half (47%) of potential returners wanted to work in the Highlands and Islands.

**Figure 5.6: Ideal work locations amongst young people**



*Source: ekosgen survey of young people, 2018 (n=2,001, excluding those from outside the region)*

5.17 The online discussions groups suggest that for some young people, whilst they may *want* to stay in the region they feel that they *have* to move to access opportunities and gain job experience.

*"I would say that everyone in my age group is currently trying to get basic job experience in a city even though they would rather stay at home." (Young person from Lochaber, Skye and Wester Ross aged 19-24)*

5.18 Similarly, the following quote demonstrates that some young people are being prevented from returning to their local area due to a lack of employment opportunities:

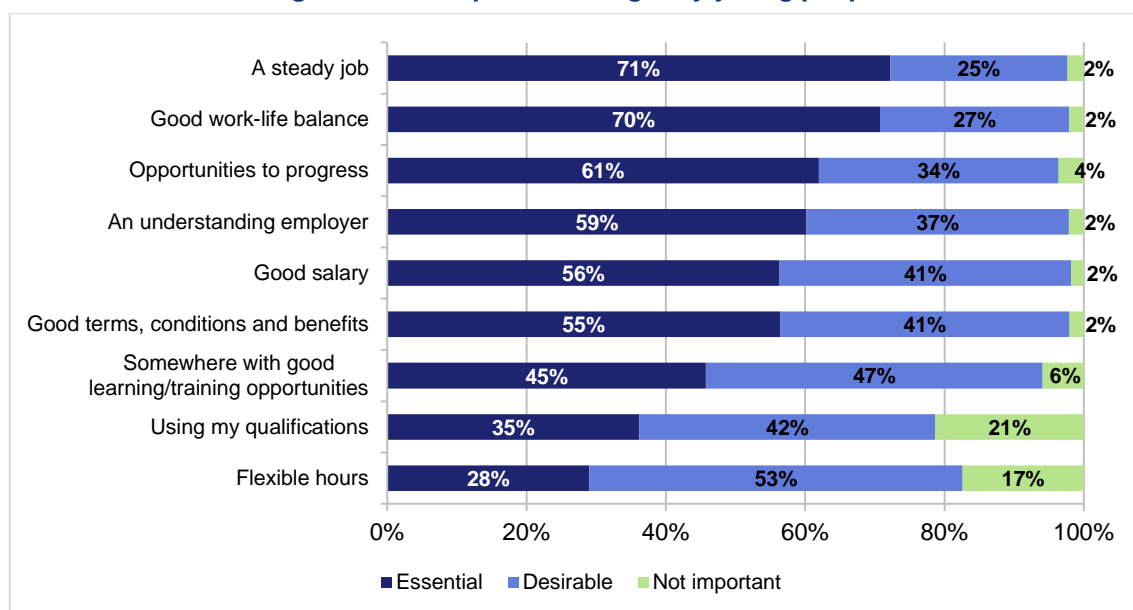
*"There are no job opportunities at the right level for me at my home island. If there were, I would be far more likely to return at a later stage in life." (Young person from Argyll and the Islands aged 19-24)*

5.19 In terms of employment aspirations, young people in the Highlands and Islands are most concerned about having a steady job and a good work-life balance – each cited as essential by 71% and 70% of respondents respectively, and desirable by a further quarter (25% and 27%) (Figure 5.7). Around three-fifths saw opportunities to progress as essential (61%) and a similar proportion sought an

understanding employer (59%). Over half were concerned with the rewards package, 56% citing the need for a good salary, and 55% flagging up the need for good terms, conditions and benefits.

5.20 While 77% of young people view using their qualifications in a job as essential (35%) or desirable (42%), just over one fifth (21%) see it as unimportant. The desire to use their qualifications was higher amongst reluctant leavers (88%) and committed leavers (81%) than committed stayers (73%). This greater desire to use their qualifications may influence leavers' feelings that they either need or want to leave the Highlands and Islands if they can't find a suitable job in the region.

**Figure 5.7: Job qualities sought by young people**



Source: ekosgen survey of young people, 2018 (n=2,134)

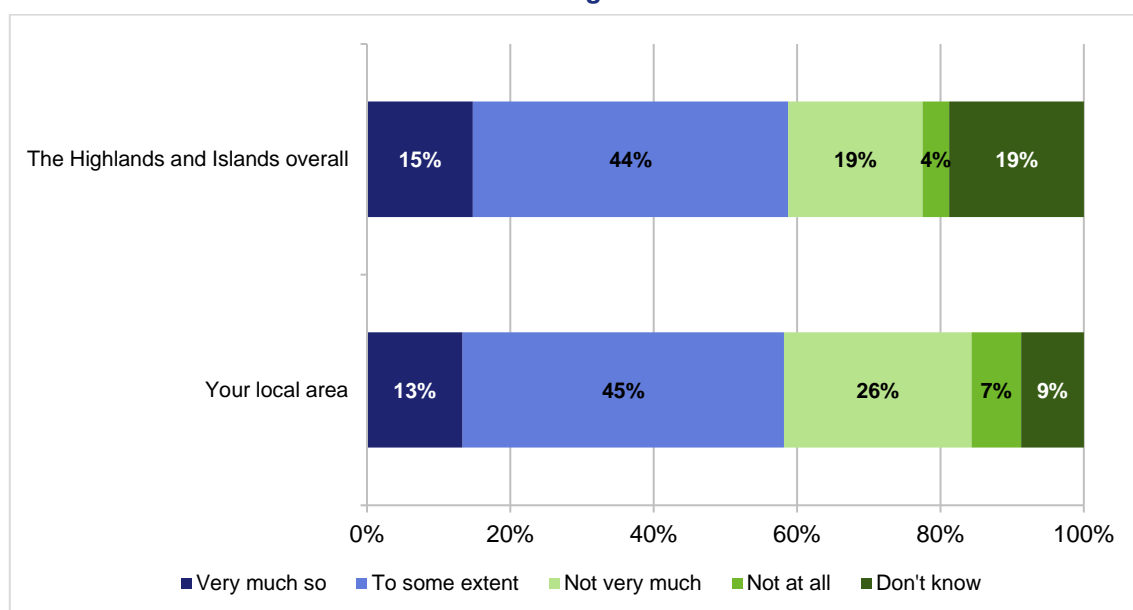
## ACCESSING EMPLOYMENT OPPORTUNITIES

5.21 Nearly 60% of respondents said that the employment factors they are looking for (as shown in Figure 5.7) are available to at least some extent in the Highlands and Islands overall, and in their local area (Figure 5.8). However, those in the 15-18 age band are more negative about the availability of employment factors that are important to them. Less than half (49%) of 15-18-year-old respondents believe that these are available in the region to some extent or very much so.

5.22 A sizeable minority reported that they don't know if the employment factors they are looking for are available, at 19% for the region and 9% for local areas. This highlights a cohort of young people who do not have a good understanding of the opportunities available to them, particularly outwith their local area. This is particularly high for 15-18 year olds (28% for the region and 17% for local areas), suggesting a need to ensure information and guidance on local and regional employment opportunities reaches this target group.

5.23 Young people living in Shetland are most likely to feel the employment factors they are looking for are available locally, with 74% saying they are very much available or are to some extent. By comparison less than half (49%) of young people in the Outer Hebrides reported that what they are looking for is available in the area. Again, there are significant differences between stayers and leavers. Nearly three quarters (72%) of committed stayers said that what they are looking for in a job is to some extent or very much so available in their local area and the Highlands and Islands overall. For committed and reluctant leavers, this drops to 46% and 53% respectively across the region. This underlines the importance of perceptions around employment opportunities for influencing young people's decisions on staying and leaving.

**Figure 5.8: Extent to which employment factors sought by young people are available in the Highlands and Islands**



Source: ekosgen survey of young people, 2018 (n=2,120)

5.24 Young people suggested that there are still limitations on the employment opportunities available in the Highlands and Islands. Just over three-quarters (76%) of respondents said that a lack of job opportunities is a key compromise that young people make to live in the region, while 62% feel they have to compromise on opportunities for career progression. Compromises are further explored in Chapter 7. The focus group discussions highlighted the lack of availability of job opportunities for graduates outside of particular sectors:

*"I know people that have been to uni and come back ending up on tills in retail, there is graduate work available (I myself am on an internship scheme) though only in specific fields." (Young person from Caithness and Sutherland aged 19-24)*

5.25 When asked about their opinions on young people who leave the Highlands and Islands to live elsewhere, 82% of survey respondents strongly or slightly agree that they need to leave to access training or employment opportunities (see Figure 3.6) – up from 72% in the 2015 survey. Some focus group participants spoke of their own experiences of having to move for better terms and conditions and employment opportunities:

*"Having been offered a job in Glasgow with a much better reputation and benefits than that available here, but with not far off double the starting salary of the same type of job in the Highlands. This gap only gets bigger the higher up the ladder I go in my field." (Young person from Lochaber, Skye and Wester Ross aged 19-24)*

5.26 As well as the limited employment opportunities, the research findings underline the importance of access to employment and career progression for retaining and attracting young people to the Highlands and Islands. This was evidenced in the survey as availability of high-quality jobs and good pay levels were the two top ranked economic factors for making the Highlands and Islands a more attractive place for young people to live. It was reflected in the discussion groups where a number of participants stated that they or others they knew would return if they could access the right career opportunities:

*"I would return if the career path I have chosen was viable on the island. With the correct level of pay, and career opportunities being available." (Young person from Argyll and the Islands aged 19-24)*

## 6 COMMUNITY AND CULTURE

### Headline messages

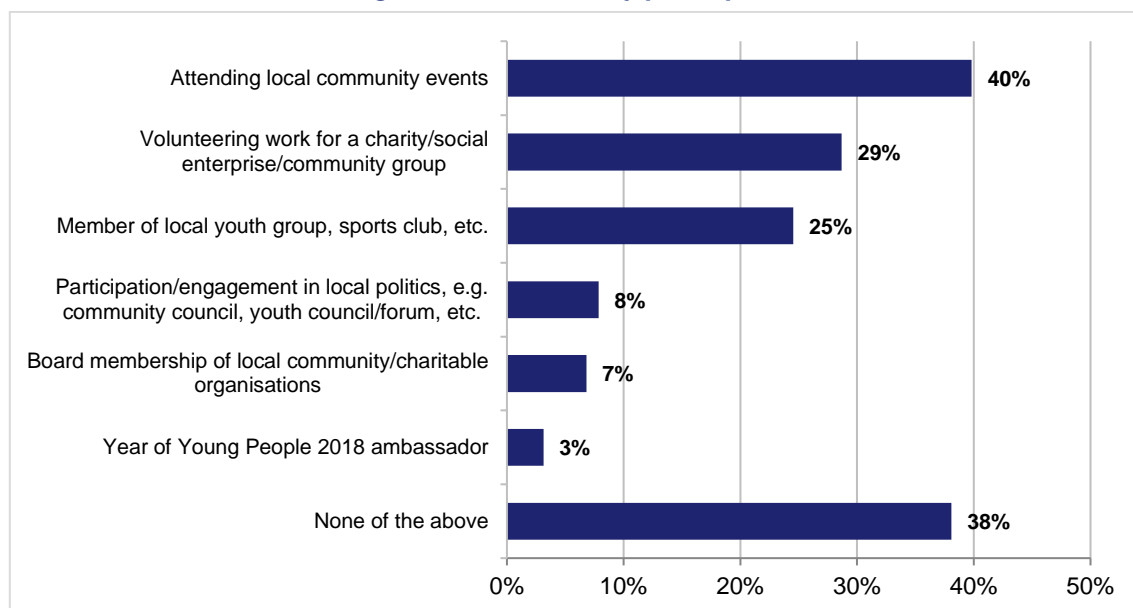
- Young people have a good connection with their local community and a good level of community participation, although community participation has fallen slightly since 2015.
- Young people have a very positive perception of their local community. They feel it is a safe place, with a good quality of life, a good place to bring up a family, and somewhere they are proud to be associated with. These perceptions have increased since 2015, particularly young people's high levels of pride in their local communities.
- Addressing perceptions of intolerance remains a challenge, with no change in the proportion of young people agreeing their community is a place where it is okay to be different since 2015. This is an issue particularly felt by those living in the Outer Hebrides and Caithness and Sutherland.
- Since 2015, there has been an increase in the proportion of young people who perceive that their needs are not being fully met in their local community. This varies widely across the region, and is particularly felt in Caithness and Sutherland. Those in Shetland are most likely to feel their needs are being met.
- Many young people engage with arts, leisure and culture amenities, particularly in island communities. Engagement in outdoor activities and attractions, gyms, leisure centres and sports facilities is particularly high.
- Young people are keen to engage in arts, leisure and culture but are hampered by a lack of affordable transport and limited availability.

### INTRODUCTION

6.1 This chapter examines the views of young people about their community, the extent to which they participate in their community, engagement with arts, leisure and culture activities and the barriers to accessing them. It draws out comparisons with the 2015 Attitudes and Aspirations research where possible, and examines variations by geography, age and gender.

### COMMUNITY PARTICIPATION

6.2 Overall, young people in the Highlands and Islands have a good connection with their local community. Sixty-two percent participate in their local community in some form, although this is lower than the 71% reported in 2015. Attending local community events (40%) is the most frequent form of community participation, although 29% do volunteering work for a charity, social enterprise or community group (Figure 6.1). The proportions engaging in local politics (8%) and taking up Board membership of community/charitable organisations (7%) remains disappointingly low.

**Figure 6.1: Community participation**

Source: *ekosgen survey of young people, 2018 (n=1,949)*

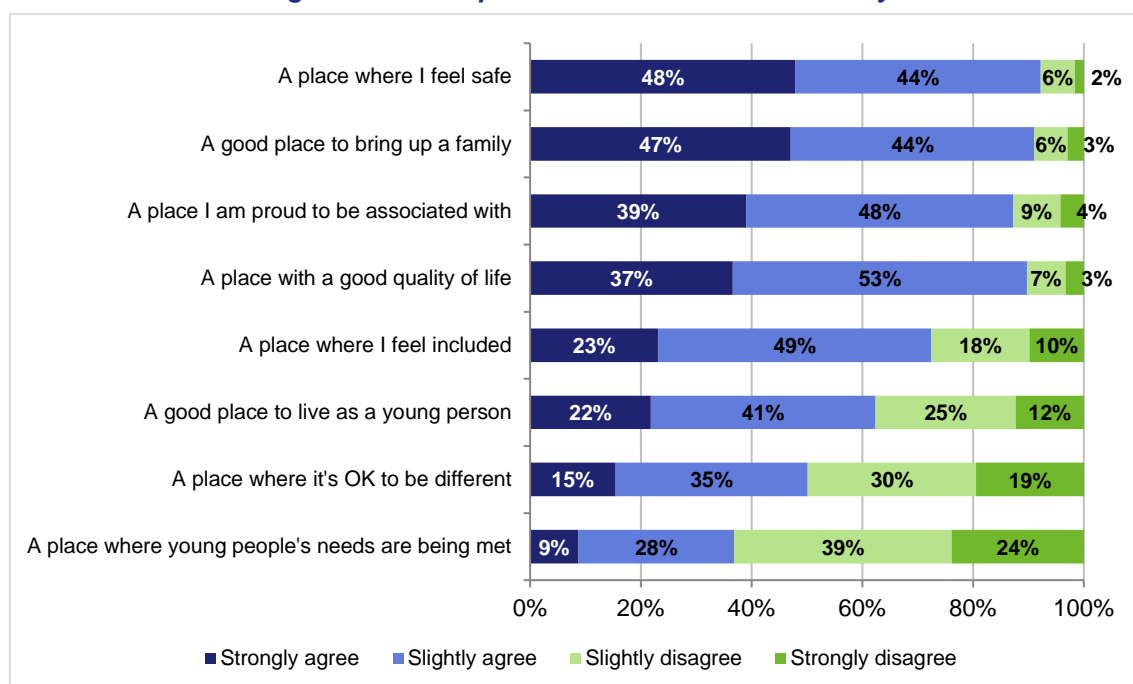
6.3 Levels of community participation in 2018 vary by geography, with the highest levels reported by young people in Orkney (81%), Shetland (72%) and the Outer Hebrides (70%). Participation is lowest in the Inner Moray Firth (54%) and Moray (58%). This reflects findings in 2015 which identified a greater degree of participation in island communities. Islands have a relatively high proportion of fragile areas and linked to this, young people in fragile areas are more likely to participate in their community than their counterparts in non-fragile areas (73% and 60% respectively).

6.4 Anecdotal evidence in the research suggests that there may be stronger community links in fragile areas as a result of, and response to, their peripherality. In addition, community activities and services may be more likely to be delivered through social enterprises and community groups, and can be more visible in smaller communities.

6.5 Whilst there is little variation by gender, young people aged 19 or over are less likely to participate in their communities than those aged 15-18 (59% vs 70% respectively), a change from 2015 where there was no notable variation by age.

## PERCEPTION OF THE COMMUNITY

6.6 As in 2015, young people have a very positive perception of their local town or community. Overwhelmingly, young people agree that their local community is safe (92% strongly or slightly agree with this), is a good place to bring up a family (91%) and has a good quality of life (90%). Almost nine in 10 young people (87%) are proud to be associated with their community, and almost four in 10 feel this very strongly (Figure 6.2).

**Figure 6.2: Perceptions of the town or community**

Source: *ekosgen survey of young people, 2018 (n=1,965)*

6.7 The picture in 2018 is even more positive than in 2015, when 87% reported that their community was a safe place to live (compared to 92% now), and the same proportion reported it is a good place to bring up a family (compared to the 2018 figure of 91%)

6.8 Increases were also apparent in the number of young people reporting that they are proud of the place they currently live (from 78% to 87%), that it is a place they feel included (69% to 72%), and that it is a good place to live as a young person (59% to 63%). Age and gender do not seem to influence young peoples' perceptions of their community as a place to live although pride in their community tends to increase with age.

6.9 Pride in their community is highest amongst young people from Shetland (96%) and the Outer Hebrides (95%), although pride is highly evident across all geographic areas. Four in five (80%) young people from both Lochaber, Skye and Wester Ross and Shetland feel included in their community, and around 75% from Caithness and Sutherland, Orkney and Argyll and the Islands, all higher than the Highlands and Islands average.

6.10 As in 2015, young people in Shetland and Orkney tend to have the strongest affinity with their local community. Although based on relatively low numbers (72), all respondents from Orkney agree that their community is a good place to bring up a family and that there is a good quality of life. Nearly all respondents in Shetland feel the same way about their area.

6.11 In 2018, 50% of young people agree that their community is a place where it is OK to be different, in line with the 2015 findings (51%). Young people in Lochaber, Skye and Wester Ross (56%) and the Inner Moray Firth (54%) are most likely to agree that it is OK to be different in their community. They are least likely to believe this in Caithness and Sutherland (34%) and the Outer Hebrides (35%). Of the young people who identify as gay, lesbian or bisexual, 34% agree that it is OK to be different in their community, compared to 53% of heterosexual young people. This points to a need for more proactive inclusion of different groups within communities.

6.12 Despite high levels of pride and affinity, there has been a sharp decline in the proportion of young people agreeing that their community is a place where young peoples' needs are being met, down from 54% in 2015 to 37% in 2018. This was most marked in Caithness and Sutherland with less



than a fifth (19%) of young people being of the view that their needs are being met. This contrasts greatly with Shetland, where almost two-thirds (65%) felt their needs were met, substantially higher than the regional average of 37%. Chapter 7, which explores the compromises that young people feel they have to make to live in the region, may provide further insight as to the needs that young people are looking to have addressed.

## THE HIGHLANDS AND ISLANDS AS A PLACE TO LIVE

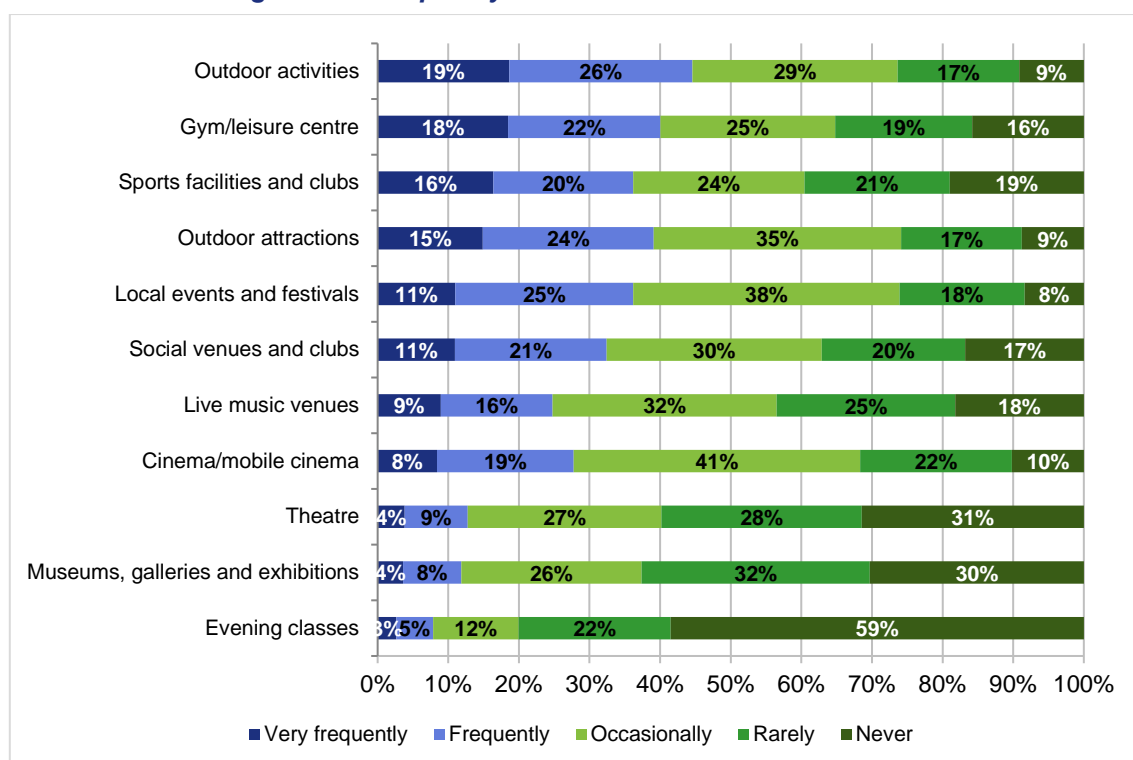
6.13 Access to amenities can be a key determinant of whether a place is attractive to live in or not, and arguably, this is particularly important for young people. Limited access to arts, leisure and culture and a lack of things for young people to do can be a driver of out-migration and also make it more difficult to attract young people to an area. The following comment from a young person illustrates this point:

*“We have a wealth of leisure opportunities in the Highlands and Islands. I think by encouraging your people to enjoy the countryside and appreciate the area that we live in would open up a lot more opportunities” (Young person from Caithness and Sutherland aged 25-30)*

### Frequency of using arts, leisure and culture offerings

6.14 Young people in the Highlands and Islands report a good level of engagement with arts, leisure and culture (Figure 6.3). Almost half (45%) participate in outdoor activities frequently/very frequently and two-fifths use gyms/leisure centres (40%) or access outdoor attractions in their area (39%). Over a third attend local events and festivals (36%), sports facilities and clubs (36%) and social venues and clubs (32%) on a frequent or very frequent basis.

**Figure 6.3: Frequency of use of amenities and activities**



Source: ekosgen survey of young people, 2018 (n=2,033)

6.15 Participation in arts, leisure and cultural amenities was explored in online focus group discussions, where many young people spoke highly of the level and quality of amenities open to them:

*“Growing up in the Highlands and Islands we were never short of activities. There has always been good access to swimming pools and cinemas (or the Screen Machine<sup>40</sup>) where I have lived. There was always access to youth clubs, holiday programmes as well as a fair amount of freedom to take advantage of our natural environment” (Young person from Caithness and Sutherland aged 25 to 30)*

*“I wouldn’t want to live anywhere else, we all go swimming, fishing, boat trips, sessions – there’s plenty of other young people” (Young person from Lochaber, Skye and Wester Ross aged 25 to 30)*

6.16 Young people in island communities seemed to engage more frequently than young people in other areas with arts, leisure and culture. This may reflect ease of access to outdoor activities and attractions, but also a sense of making the most of what is available when it is available. Over half the respondents in Argyll and the Islands (53%) and the Outer Hebrides (51%) took part in outdoor activities on a frequent or very frequent basis. Accessing outdoor attractions is highest among young people in the Outer Hebrides (48%) and Orkney (46%). There is also frequent engagement with local events and festivals amongst young people in Shetland (44%) and the Outer Hebrides (43%); and with cinema/mobile cinema for those from Shetland (36%).

6.17 Young people in Moray, Lochaber, Skye and Wester Ross and Caithness and Sutherland tend to have the lowest levels of engagement with arts, leisure and culture. Engagement with theatres (5%) and cinemas/mobile cinemas (15%) is particularly low amongst young people in Lochaber, Skye and Wester Ross; live music venues in Caithness and Sutherland (15%) and Moray (16%); and sports facilities and clubs (28%) and gyms/leisure centres (29%) in Moray.

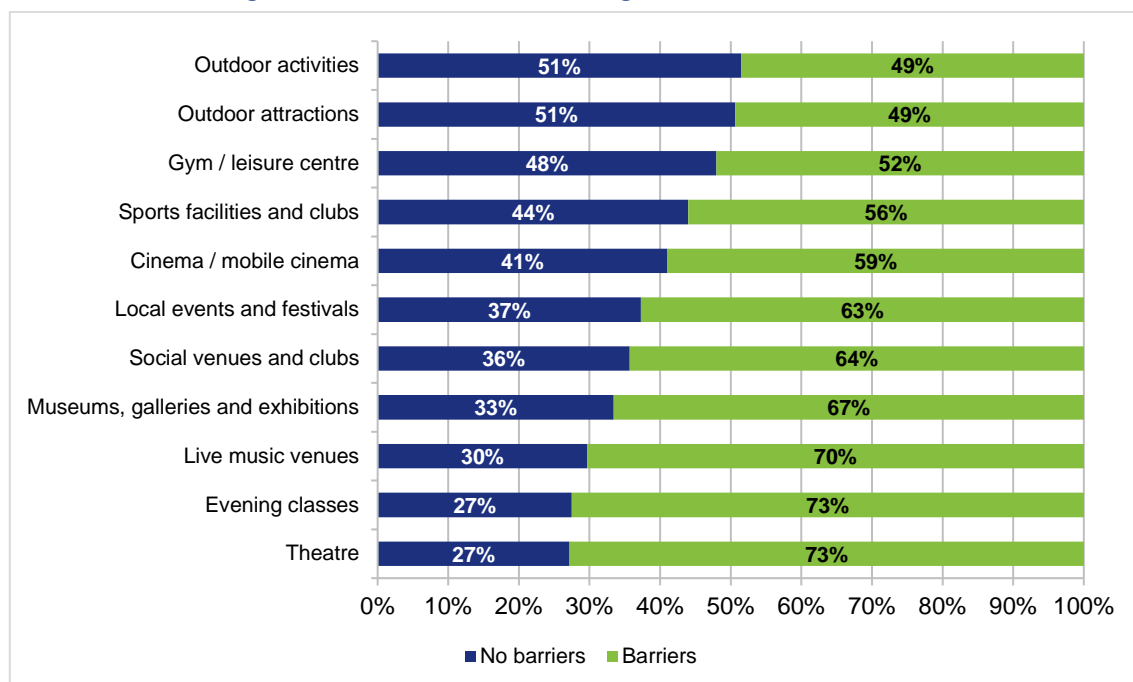
6.18 Evening classes do not appear to be particularly popular with young people responding to the survey with only 40% reporting that they have, at some point, taken part in classes. Just 8% report accessing evening classes very frequently or frequently and this is most likely in the Outer Hebrides (14%) and Argyll and the Islands (12%).

### **Barriers to accessing arts, leisure and culture offerings**

6.19 There is often a mismatch between the demand for arts, leisure and culture offers and young peoples’ ability to access them. The survey examined the extent to which young people face barriers to accessing these offers, and what these barriers are. The findings show that young people experience fewest barriers when accessing outdoor activities, outdoor attractions and gyms/leisure centres. Around half of young people report no barriers to accessing each of these (Figure 6.4). There is very little difference in barriers to accessing these offers between fragile and non-fragile areas.

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<sup>40</sup> <https://www.screenmachine.co.uk/>

**Figure 6.4: Barriers to accessing services and amenities**

Source: ekosgen survey of young people, 2018 (n=2,015)

6.20 In general, barriers relate to limited accessibility rather than the *quality* of amenities or a lack of interest amongst young people. The main barrier to taking part in arts, leisure and cultural activities is a lack of local availability. Cost and a lack of transport to reach them were also frequently cited.

6.21 Over 70% report that they face barriers in accessing theatres, evening classes and live music venues. Again, this reflected availability with 32% reporting a lack of live music venues, 31% a lack of theatre and 27% a lack of evening classes. Availability of local events and festivals was also highlighted by respondents, a particular example being cited in the following comment:

*“The loss of RockNess was felt strongly and more should have been made of this”  
(Young person from Caithness and Sutherland aged 25-30)*

6.22 It was also felt that there is a lack of variety and choice in social venues and clubs, reinforced by the following comment:

*“There is a lack of social opportunities in the area I live, whereas leisure maybe less so due to access to outdoors” (Young person from the Outer Hebrides aged 25-30)*

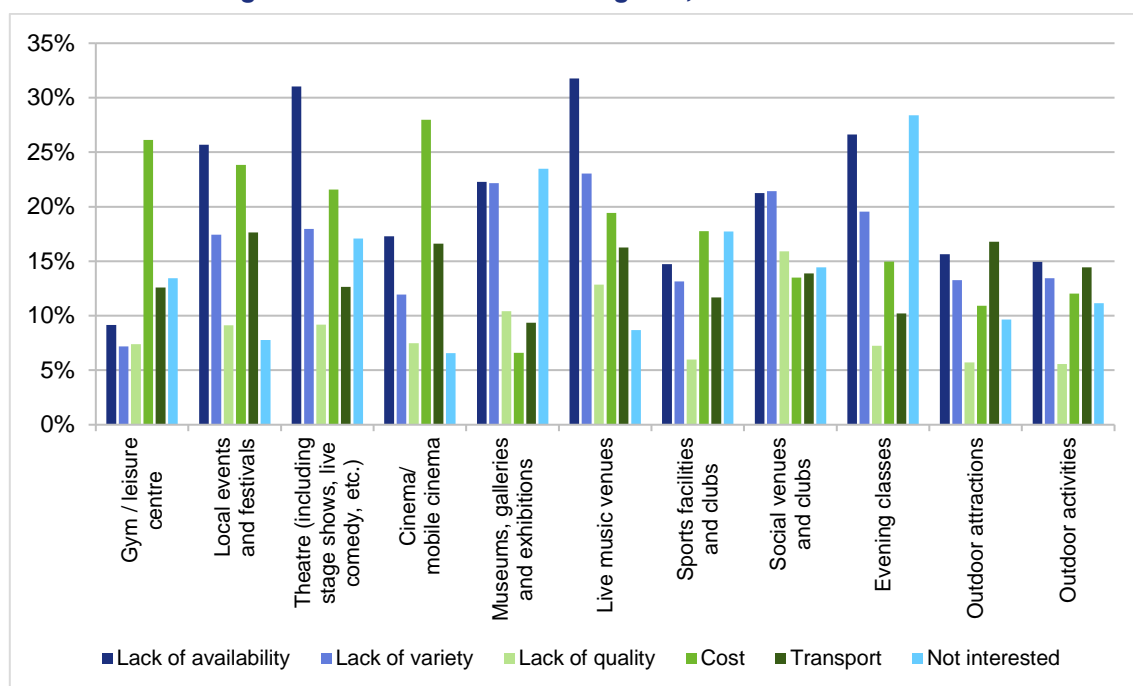
6.23 Cost emerged as a key barrier to taking part in sports, such as gyms, leisure centres and sports facilities and clubs, in some areas, particularly in more rural communities, as illustrated by the following comment:

*“I think local businesses monopolise on the lack of variety for recreational activities in rural areas, which makes it more expensive. For example, gym membership. In the Highlands, High Life have a full membership for single adults for less than £20 per month... the Islands are paying over twice this amount for sometimes a more limited service” (Young person from Shetland aged 25-30)*

6.24 Although the Screen Machine has gone some way to making film more accessible to young people across the whole of the Highlands and Islands, cost is still cited as a barrier in accessing cinema.

6.25 Figure 6.5 sets out the reported barriers for each arts, leisure and culture offering.

**Figure 6.5: Barriers to accessing arts, culture and leisure**



Source: ekosgen survey of young people, 2018 (n=2,015)

6.26 Where there are barriers to accessing outdoor attractions, they tend to be more about transport availability. This issue was discussed further in the online focus groups, and the following comments provide a flavour of the findings:

*“In terms of leisure there is lots of opportunities...plenty of outdoor opportunities not available elsewhere...but my issue is that I live in the middle of nowhere so I can’t access any of this as it is in towns or villages and the transport is not there for after work/evening so I lose out on that” (Young person from Caithness and Sutherland aged 19-24)*

*“It is extremely challenging to live an active and fulfilling life in the Highlands and Islands without ownership or access to a vehicle.” (Young person from Argyll and the Islands aged 25-30)*

*“There isn’t a lot to do in the Highlands and Islands area...having more regular transport could make attending events more attractive as people could attend and then get home safely” (Young person from the Inner Moray Firth aged 25-30)*

## 7 MAXIMISING OPPORTUNITIES

### Headline messages

- Young people see compromises as a necessary feature of living in the Highlands and Islands, and this is most common in fragile and more remote parts of the region.
- Transport underpins access to a wide range of opportunities, and young people are most likely to perceive – and make – compromises on transport. It is seen more as an inconvenience than a barrier, but it is nevertheless a challenging issue.
- Fewer job and career progression opportunities is something that many young people compromise on, as well as on salary levels and underemployment. However, the variety of opportunities is felt to be improving.
- Compromising on education – and education choice – is more frequent in Caithness and Sutherland and Shetland. Across the region, many young people still feel that subject range availability limit their employment and career choices.
- Compromises on accommodation are clearly dependent on life stages of young people. The proportion of young people that see housing as a compromise, and have compromised on accommodation, is lower than expected – but where this is an issue, it is significant. Housing for young people is therefore still a challenge to address in the region.
- Limited access to services, amenities and connectivity for young people is a significant compromise, and this contributes to young people seeking opportunities outside the region.
- Very few young people consider that there is any compromise to be made on quality of life in the Highlands and Islands. Instead it is considered a real strength.
- Good pay, availability of high-quality jobs and low cost of living are identified as critical to making the region attractive for young people, along with quality of life and affordable housing.

### INTRODUCTION

7.1 This chapter seeks to better understand some of the “push” and “pull” factors influencing the choices of young people in relation to whether they stay, leave, return to or move to the Highlands and Islands. It explores their views on whether compromises are necessary to live, work and study in the Highlands and Islands and if so, what types of compromises. It investigates the compromises they have or would be prepared to make, and the compromises they are *not* prepared to make. It also identifies the economic and social factors that need to be in place to make the region more attractive for young people. Some comparison is made with findings from the 2015 Attitudes and Aspirations research, and links are made with existing initiatives and policy interventions.

7.2 Findings will enable HIE to ensure that young people benefit from and contribute to the inclusive elements of growth across the Highlands and Islands, including its rural, remote and island communities. It is recognised that there is hidden poverty in small communities as a result of the cost of living, and accessibility of transport, education and employment impact more negatively on rural populations. By meeting the needs of young people whose decisions to leave or stay are influenced by the compromises they face, we can strengthen talent attraction and retention, building the skills base and future workforce of our region.

7.3 This is consistent with the Scottish Government's inclusive growth and fair work agendas, and will contribute to meeting targets across its National Performance Framework indicators, as well as to HIE's delivery of its equality outcomes to increase the diversity of leadership and workforce participation in the Highlands and Islands. HIE's new socio-economic (Fairer Scotland) outcome focuses on growing the working age population in every part of the Highlands and Islands. Addressing youth out-migration

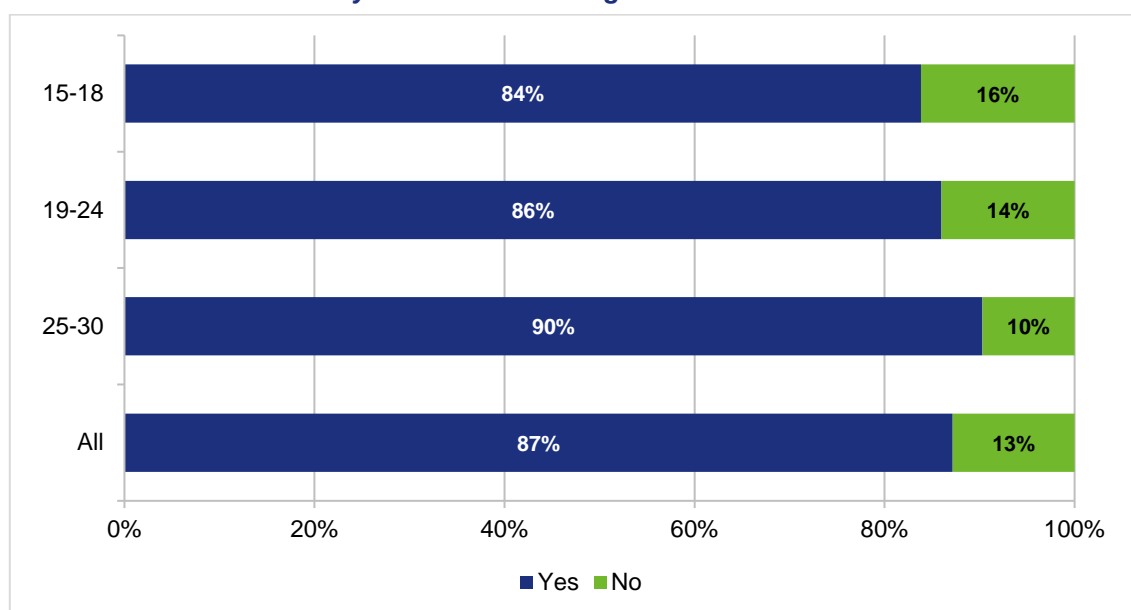
through tackling the compromises that young people have to make is an essential component of achieving this outcome.

## COMPROMISING ON OPPORTUNITIES

### Compromises to live, work and study in the Highlands and Islands

7.4 Young people clearly think that life in the Highlands and Islands requires making compromises on some aspects of life (Figure 7.1). Most respondents (87%) acknowledge this, with no difference between genders. A high proportion of all ages report the need for compromise, but this is particularly marked among young people at the upper end of the 15-30 age band. Around 90% of respondents aged 25-30 feel that compromises are necessary compared to 84% in the 15-18 age group.

**Figure 7.1: Views on whether compromises are necessary to live, study and work in the Highlands and Islands**



*Source: ekosgen survey of young people, 2018 (n=1,737)*

7.5 Geographical variations are very apparent in considering the extent and type of compromises that young people feel they have to make to live in different parts of the region. Young people in fragile areas are more likely to report that compromises need to be made (92% v. 86% in non-fragile areas), as are those living in Lochaber, Skye and Wester Ross and the Outer Hebrides (92%). In contrast, those who live in the Inner Moray Firth (83%) are least likely to think that people have to make compromises. Clearly, compromises are associated more with living in remote parts of the Highlands and Islands.

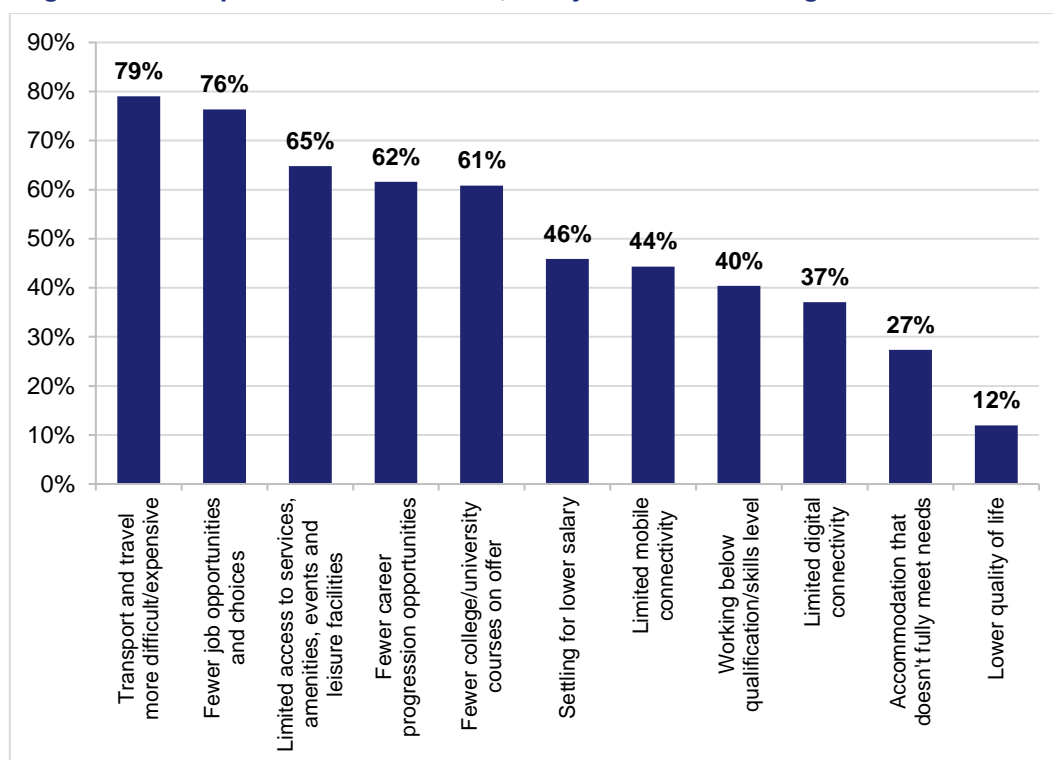
7.6 The proportion of young people who consider compromises a necessary feature of life in the Highlands and Islands is particularly high amongst reluctant stayers (94%), reluctant leavers (93%), potential returners (93%) and committed leavers (89%). This suggests that the perception and reality of compromises is a major push factor for young people living, studying and working in the Highlands and Islands. It is also a barrier to attracting young people back to the region.

7.7 In contrast, young people that identify as committed stayers (84%) are less likely to agree that compromises need to be made, although exploration of types of compromises reveal that most do actually feel they are necessary. This suggests an acceptance and tolerance of compromise. Potential new residents (75%) are also much less likely to think that there are compromises to be made, which could reflect a lack of understanding of the region and/or idealistic perceptions about life there. For both

groups, it may be that making compromises is outweighed by the benefits to be gained by living in the region.

7.8 There are a range of compromises that young people perceive people generally have to make in order to live in the Highlands and Islands (Figure 7.2). These range from transport and job opportunities, which the majority of young people feel that people have to compromise on, to quality of life, which few young people believe is a compromise that has to be made when living, studying and working in the Highlands and Islands.

**Figure 7.2: Compromises made to live, study or work in the Highlands and Islands**



Source: ekosgen survey of young people, 2018 (n=1,438, asked of all who think H&I living requires compromises)

## Making compromises

7.9 Young people themselves have already made a number of compromises in living, studying and working in the region, as typified by the following comment:

*“Clearly, at home in the Highlands and Islands we have to compromise by living with fewer transport links, often fewer services such as gyms, swimming pools, etc., and fewer job opportunities and perhaps less diversity in the job market with fewer large employers.”*

*(Young person from Lochaber, Skye and Wester Ross aged 25-30)*

7.10 When asked what types of compromises they have made, or would be prepared to make, for nearly all compromise types the largest proportion indicated that they have made compromises already, or would not be prepared to make them (Table 7.1).

7.11 The types of compromises, and how young people view these, are explored more fully in the following sections.



**Table 7.1: Compromises young people have made or are prepared/not prepared to make**

	I have already made	I would be prepared to make	I would not be prepared to make	I do not think this compromise exists
Accepting that transport and travel is more difficult and expensive	61%	22%	13%	5%
Having limited access to amenities, events, services and leisure facilities	47%	26%	16%	12%
Having limited mobile connectivity	45%	22%	16%	17%
Having fewer job opportunities and choices	40%	19%	33%	7%
Having limited digital connectivity	37%	22%	20%	21%
Having fewer opportunities for career progression	31%	21%	39%	9%
Having fewer courses on offer at college/university	29%	24%	37%	11%
Settling for a lower salary	29%	24%	36%	11%
Working below my qualification and skills level	24%	27%	37%	12%
Living in accommodation that doesn't fully meet my needs	19%	19%	34%	27%
Having a lower quality of life	12%	8%	36%	44%

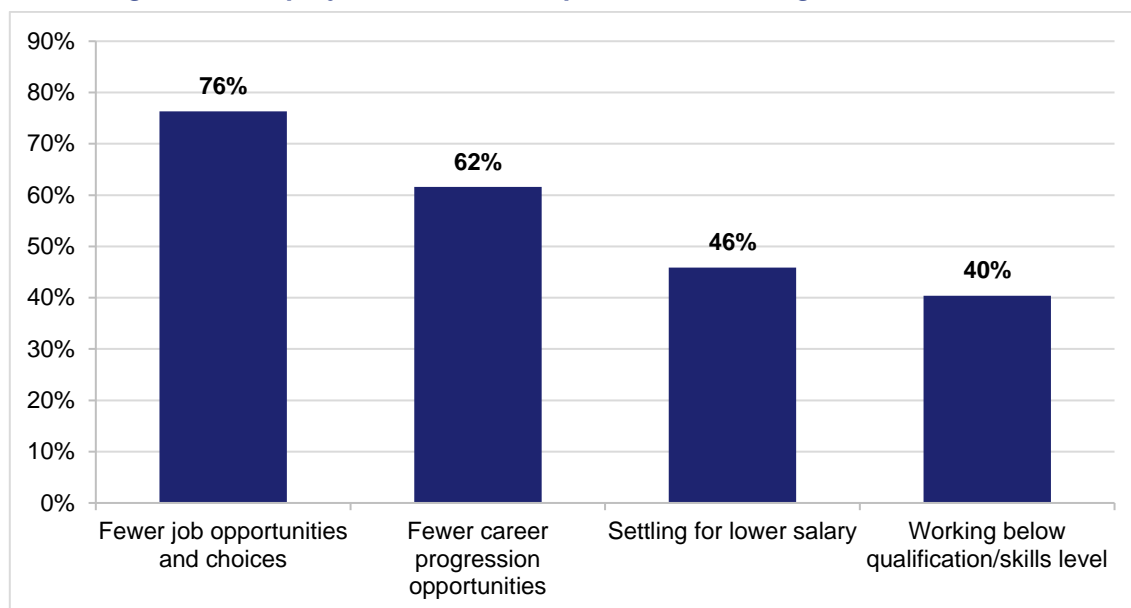
Source: ekosgen survey of young people, 2018 (n=1,337, asked of all in the H&I who think H&I living requires compromises)

## COMPROMISING ON EMPLOYMENT AND CAREER PROGRESSION

### Employment, pay and career opportunities

7.12 Access to and awareness of employment and career opportunities is an important element of talent retention and attraction in any region, and has been a significant focus for HIE and strategic partners for several years. HIE's Young People and the Highlands and Islands: Attitudes and Aspirations research in 2015 identified high-quality jobs and opportunities for career progression as the top two factors that needed to be in place to make the region a more attractive place to live, work and study. Employment is still perceived as an area where significant compromises are necessary.

7.13 More than three quarters of respondents (76%) feel that there are fewer job opportunities in the region compared to the rest of Scotland, and a further 62% think that there are fewer opportunities for career progression (Figure 7.3). Lower salary levels and underemployment are also cited by sizeable minorities as compromises related to working in the region. These are likely to be important drivers or "push" factors for leaving the region – and also barriers to talent attraction. This reflects the challenges targeted by the Highlands and Islands Talent Attraction, Retention and Return Strategy, and wider DYW activity.

**Figure 7.3: Employment-related compromises in the Highlands and Islands**

Source: *ekosgen survey of young people, 2018 (n=1,337, asked of all who think H&I living requires compromises)*

7.14 Females are more likely to perceive that there are employment and career compromises to be made. For example, 78% of females (versus 73% of males) think that people have to accept fewer job opportunities to live in the Highlands and Islands. Most committed stayers (74%) think that there are fewer job opportunities, and a lower proportion (58%, versus 62% overall) think that there are fewer opportunities for career progression in the region.

7.15 Young people in Caithness and Sutherland, the Outer Hebrides and Orkney are more likely than average to agree that compromise is required on job and career progression opportunities (at least five to six percentage points higher than regionally). This suggests that employment and career opportunities are perceived as more limited in more remote parts of the region.

7.16 Almost half (46%) of respondents feel that people have to settle for a lower salary in the Highlands and Islands, highest in Orkney (54%) and the Outer Hebrides (53%). Reluctant stayers (60%) and young people aged 25-30 (53%) are also more likely to think that people need to settle for a lower salary.

7.17 Underemployment in terms of the incidence of skills underutilisation across the workforce has increased by 5% to 34% between 2015 and 2017 in the Highlands and Islands.<sup>41</sup> Two in five young people saw underemployment as a necessary area of compromise to work in the region, rising to 50% in the Outer Hebrides (50%), and 49% in fragile areas more generally. Females are also more likely than males to perceive it as a challenge (43% vs 34%).

7.18 Underemployment is a challenge that is often hidden; and HIE and partners recognise its importance and are focusing on it. The talent attraction and retention work being undertaken also considers more indirect factors (i.e. things 'behind' the workers attracted to or retained in the region) such as opportunities for spouses and family. Evidence drawn from our online focus groups suggests that underemployment is very much an ongoing issue for the region's young people:

*"I am currently underemployed with my post-grad and travel for over three hours per day for work." (Young person from Argyll and the Islands aged 25-30)*

<sup>41</sup> Department for Education (2017) Employer Skills Survey 2017, Scotland slidepack

*“My partner works from home and does very well for himself. When we moved to Orkney, I looked at job offers, but ended up deciding it's best for me to do work around the house and garden, freelance tech work, and some volunteering, than spend all my time away from home for a salary that would only minimally increase our income.” (Young person from Orkney aged 25-30)*

## **Making compromises on employment, pay and career opportunities**

7.19 A considerable proportion of young people in the Highlands and Islands feel that they have already compromised on employment factors (Figure 7.4). Around 40% feel they have compromised on job opportunities, and a further 31% on career progression opportunities to live and work in the region. This broadly aligns with the findings regarding the regional availability of employment factors that young people look for, and the lack of appropriate employment opportunities, as set out in Chapter 5. The prospect of compromising on employment and career opportunities is a significant push factor in terms of young people deciding where to look for employment, and whether this is in or outwith the region.

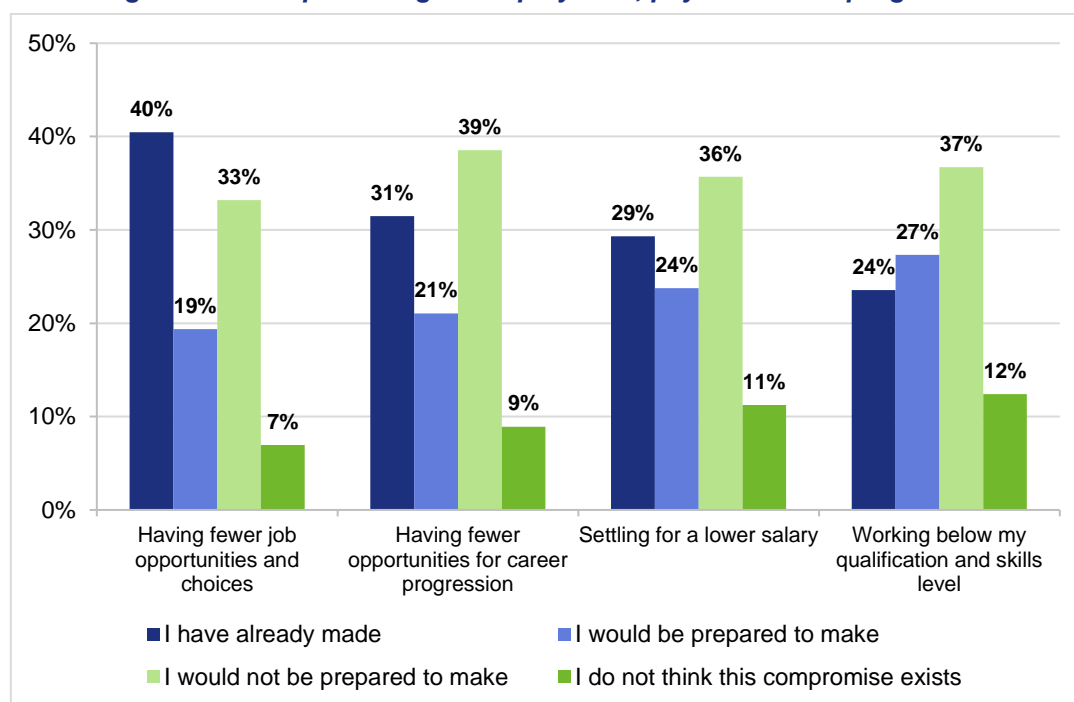
7.20 Almost three in ten young people in the region (29%) cite salary levels as a compromise they have already made (Figure 7.4). This is a serious challenge in terms of talent attraction and retention. The online focus groups found that young people feel many employment opportunities in the region are at a much lower salary for comparable jobs than elsewhere in Scotland. This is exemplified by the following comments:

*“Young people who live in the Highlands and Islands currently face that their salaries are going to be lower than a Scottish average and the cost of living is going to be higher than a Scottish average, for some significantly.” (Young person from Caithness and Sutherland aged 25-30)*

*“There are many graduate opportunities for me in Highlands and Islands but pay is a lot lower than that of the central belt...when [the] price of living in rural Highlands and Islands [is] much, much higher.” (Young person from Lochaber, Skye and Wester Ross aged 25-30)*

*“Not being from here, I was pretty shocked when I started looking at jobs and saw the low salaries offered, even for jobs that require a degree and...experience.” (Young person from Orkney aged 25-30)*

7.21 Almost a quarter of young respondents (24%) report underemployment as a compromise they have already made.

**Figure 7.4: Compromising on employment, pay and career progression**

Source: ekosgen survey of young people, 2018 (n=1,337, asked of all in H&I who think H&I living requires compromises)

7.22 Females are more likely to have made compromises on employment factors than males (by an average of six percentage points). There are also some notable geographical variations, with compromises most apparent in more remote areas. Young people in fragile areas are more likely to report having already made compromises on all employment-related factors. Respondents from Caithness and Sutherland (44%) and Lochaber, Skye and Wester Ross (43%) are more likely to state they have made compromises on job opportunities, while young people in the Outer Hebrides (38%) and Moray (34%) are more likely to state they have made career progression compromises. Whilst young people in the Outer Hebrides and Moray (34%) are more likely to feel that they have already compromised on salary levels, young people in Orkney and Shetland are less likely to report having done so.

7.23 A significant proportion of young people *would not* be prepared to make a compromise on employment matters (Figure 7.4). Almost two in five would not be prepared to compromise on career progression opportunities (39%), working below their skills or qualification levels (37%), or accepting a lower salary (36%) to work in the region. Younger age groups, committed leavers and those living in the Inner Moray Firth were most likely to state this. A third also stated that they would not accept a more limited range of job opportunities. This was highest for those living in student accommodation (53%) and potential returners (52%). This is also reinforced by the view of leavers as needing to do so to pursue better employment opportunities (Chapter 3).

7.24 That said, given that a considerable proportion of young people are aware of the employment opportunities in their local area, there is some encouraging evidence to suggest that employment choice is gradually improving. For example, one online focus group participant stated:

*"I'm not from the Highlands and Islands originally...Just from what I've observed, there are less [sic] higher paying/degree-level jobs up here... though this seems to be changing quickly; I think there are a lot more degree-level jobs up here than even 10 years ago."*  
(Young person from Orkney aged 25-30)

7.25 Maximising the employment opportunities available, and adequately promoting the availability of these is acknowledged as a challenge by strategic partners. The work of the DYW partnerships across the region is going some way to addressing this, by working with employers to engage with schools and colleges to better promote employment and career opportunities in key sectors in the Highlands and Islands. Some local authorities and growth deals are also putting initiatives in place to open up more employment and work experience placements; for example, Highland Council has implemented its own youth employment initiative. However, there is acknowledgement from some stakeholders that the promotion of employment and career opportunities is “not quite right”, so more clearly remains to be done to address this issue.

7.26 As reflected earlier in the report (Chapter 5) fewer young people (38%) cite barriers in terms of availability of job opportunities compared to those that identify the need for compromise. This suggests that though there may be a sufficient *number* of opportunities, there is less *diversity* of opportunities, with some perhaps requiring less skill or using fewer or different qualifications than those typically held by individuals undertaking these roles. This is reinforced by findings through the qualitative research as demonstrated by the following comments:

*“I...believe that the jobs available at home may not be as challenging as those further south/in the cities.” (Young person from Lochaber, Skye and Wester Ross aged 19-24)*

*“Graduates are frequently settling for a job at a level which is much below what they have qualified for... employers would like someone with a minimum of two years’ experience, this means there are limited opportunities.” (Young person from Caithness and Sutherland aged 25-30)*

*“There are clearly more diverse job opportunities elsewhere...in Highlands and Islands, there are fewer jobs of certain levels on offer which may result in a less well-suited job.” (Young person from Lochaber, Skye and Wester Ross aged 19-24)*

## EDUCATION COMPROMISES

7.27 The limited availability of courses, and other issues relating to accessibility of education such as transport, have traditionally meant that young people have had to leave the Highlands and Islands to study. In recent years, there has been major effort by FE and HE providers, and UHI in particular, to broaden curriculum offerings and improve access to courses, including greater use of digital technologies to extend reach. There has also been development and expansion of campuses in the Highlands and Islands from universities based outside the region e.g. Aberdeen and Heriot-Watt. This is borne out by the positive findings relating to education highlighted in Chapter 4.

7.28 Despite this, access to education remains an issue and is a key area of compromise for young people. More than 60% of respondents report that access to fewer college and university courses in the Highlands and Islands is a necessary compromise of living and studying in the region. Females (64%) are more likely than males (54%) to perceive the need for compromise, as are those at the younger end of our target age band (62% of those aged 15-18 and 63% of those aged 19-24).

*“To study here, there are certainly compromises as often the institutions here do not have the reputation or breadth of courses on offer as those in the central belt or elsewhere.” (Young person from Lochaber, Skye and Wester Ross aged 19-24)*

7.29 Whilst there is undoubtedly less choice of courses in the region, there may also be a lack of awareness amongst young people of the full range that is available. As identified previously, there is scope to better communicate and raise awareness of what is available at FE and HE level, as well as through vocational education pathways such as apprenticeships.

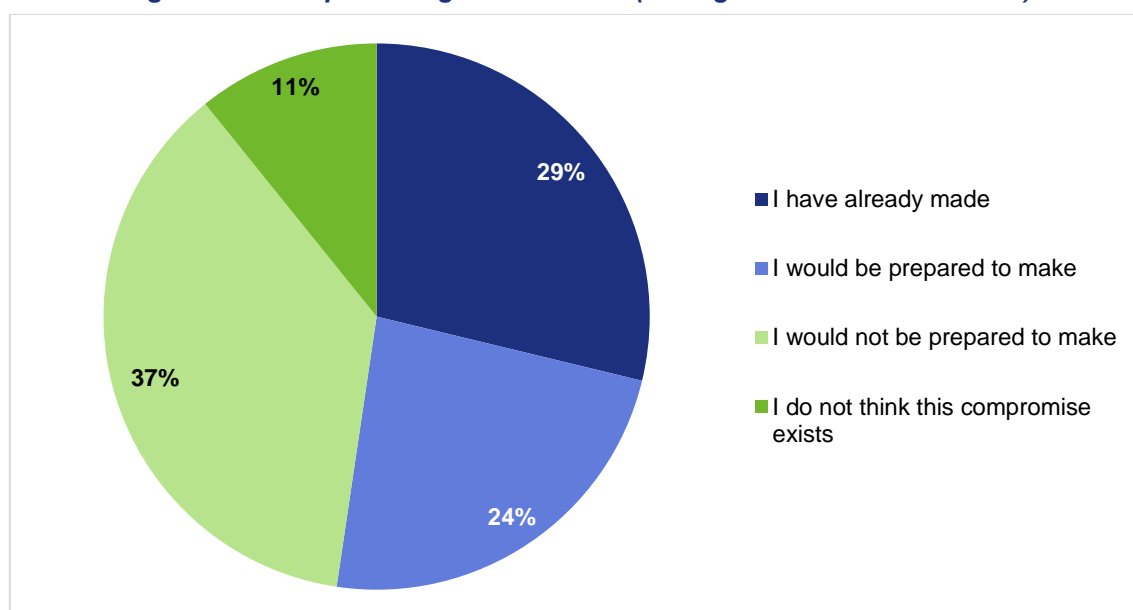
7.30 There is a clear geographical split on perceptions of education-related compromise. In contrast to the rest of the region, and possibly reflecting changes associated with the opening of the Inverness

Campus in 2015 (and Inverness College's relocation to it), young people in the Inner Moray Firth (56%) and Moray (53%) are least likely to agree that people in the Highlands and Islands must compromise on access to education. Young people in Orkney are most likely to state that there are compromises to be made (74%).

7.31 As illustrated in Figure 7.5, accepting this compromise is something that over half of young people in the Highlands and Islands have either done (29%), or are prepared to do (24%). Those in Shetland (40%) and Caithness and Sutherland (37%) are most likely to have compromised to access education in the region. For some, this ultimately means having to leave their local area.

7.32 Thirty-seven percent of young people state that they would not be prepared to compromise on education choice. Those in Orkney are most likely to not accept this compromise (42%), as are young people at the lowest end of the target age range (47% of those aged 15-18).

**Figure 7.5: Compromising on education (having fewer courses on offer)**



Source: ekosgen survey of young people, 2018 (n=1,324, asked of all in H&I who think H&I living requires compromises)

7.33 This is undoubtedly a factor in the decision of many young people to leave the region to pursue HE, and to a lesser extent FE, opportunities. However, there is evidence to suggest that initiatives for curriculum expansion and improving access are having a positive effect. Anecdotally, better alignment of the curriculum to key industries in Argyll and the Islands has led to a significant recent increase in enrolments at Argyll College UHI, for example. UHI is also networking FE and HE programmes to widen the variety of courses on offer to students in more remote areas, opening up access through novel and innovative means such as its Virtual Learning Environment (VLE). This was backed up with evidence from the online focus groups, suggesting that awareness of curriculum improvements and perceptions of the choice available is improving:

*"I feel that the UHI offers fantastic opportunities and if it was not for the UHI, I would not be in the position to consider a career change into teaching." (Young person from Inner Moray Firth aged 25-30)*

*"[The course choice in the Highlands and Islands is] most definitely becoming [sic] up to speed with bigger areas." (Young person from Moray aged 19-24)*

*"A lot of people seem to study remotely here in Lewis which offers access to courses which could not be justified to be run in the Outer Hebrides based on the numbers who*

*would sign up. This should be explored further to try and bring more courses to those who don't want to move away to study.” (Young person from the Outer Hebrides aged 25-30)*

## COMPROMISING ON TRANSPORT

7.34 Transport underpins access to a wide range of other economic, social and cultural opportunities. HIE's research on a Minimum Income Standard for Remote Rural Scotland<sup>42</sup> highlighted that people in more rural communities typically have to travel further to access employment and services, but have more limited public transport options than counterparts in urban areas.

7.35 Reflecting this, transport is the factor where most young people perceive compromise as necessary, with almost 80% of young people acknowledging that transport and travel is more difficult and expensive in the Highlands and Islands. At 81%, young women are more likely to consider transport a compromise than men (75%).

7.36 As identified in Chapters 4 and 5, around a third of young people (31%) see lack of transport (or lack of affordable transport) as a barrier to study and 12% as a barrier to employment. The 2015 Attitudes and Aspirations research highlighted high levels of car ownership amongst young people; in 2018, almost 70% of young people stated that they have access to transport for their own use, such as their own vehicle or a family vehicle that they are able to use.

7.37 This suggests that many take steps to address this issue. It is likely that many young people see transport challenges as an inconvenience or 'fact of life' rather than an insurmountable barrier, but this should not detract from the fact that difficult and expensive travel is of disproportionate significance for young people in more rural communities:

*“[I] accept having to travel 150 miles to the nearest hospital.” (Young person from Caithness and Sutherland aged 19-24)*

*“Poor quality roads, expensive trains, slow connectivity in rural areas.” (Young person from Inner Moray Firth aged 19-24)*

7.38 Transport is the factor that most young people have (61%) or would (22%) make compromises on in order to live in the region (Figure 7.6). More females (63%) than males (53%) report having made compromises on transport. It is already recognised that transport is a barrier for women in rural areas where inadequate transport facilities can serve to isolate women and travel patterns and participation in activities often reflect persistence of traditional gender roles.<sup>43</sup> While more women hold driving licences in rural areas than in urban, this is still a smaller proportion than men.

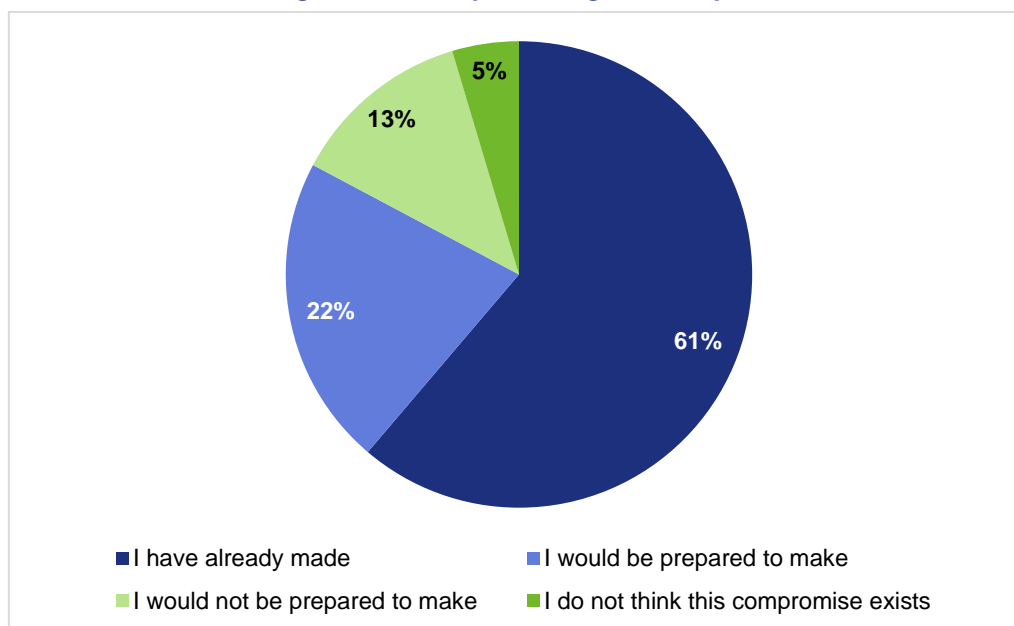
7.39 There is also a clear geographical divide. Young people outside of the Inner Moray Firth (57%) and Moray (53%) are much more likely to have already compromised on transport. For example, those in Lochaber, Skye and Wester Ross (70%) are most likely to have compromised on transport, along with young people on Orkney and Shetland (67%). Young people in fragile areas are also more likely to have compromised on transport (69% vs 58%).

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<sup>42</sup> <http://www.hie.co.uk/regional-information/economic-reports-and-research/archive/a-minimum-income-standard-for-remote-rural-scotland.html>

<sup>43</sup> Scottish Government Rural Science and Analysis Unit (2015) Review Of Equality Evidence In Rural Scotland



**Figure 7.6: Compromising on transport**

Source: *ekosgen survey of young people, 2018 (n=1,341, asked of all in H&I who think H&I living requires compromises)*

## COMPROMISING ON ACCOMMODATION

7.40 Housing, particularly access to suitable and affordable housing, is a recognised challenge in the Highlands and Islands and more so in more remote parts of the region. It emerged as a barrier for young people in the 2015 Attitudes and Aspirations research and more recent HIE research<sup>44</sup> identified a large proportion of “young and stuck” people, with limited access to affordable and suitable housing.

7.41 At an overall level, most young people do not perceive that it is necessary to compromise on housing to live in the Highlands and Islands – only 27% do so (Figure 7.2). This corresponds to the findings discussed earlier that most young people do not see access to accommodation as a barrier to studying and working in the region. However, geographical variations were apparent. Young people in fragile areas are somewhat more likely to perceive compromises on accommodation as necessary than those in non-fragile areas (31% versus 27%). Young people in Argyll and the Islands and in Lochaber, Skye and Wester Ross are more likely to perceive the need for compromise on housing – around 40% do so. Reluctant stayers are also more likely to agree that housing compromises are necessary (44%).

7.42 Additional analysis revealed housing as being more of a life-stage issue, influenced by age and current living arrangements of young people in the study. Older age groups are more likely to consider compromising on housing as necessary – 29% of those aged 19-24 and 30% of those aged 25-30 do so compared to 18% of 15-18 year olds.

7.43 Around half of the survey respondents live in a family/parental home, and a further 17% in a home they own. Young people who live in the family home (24%) or in a home they own (20%) are less likely to consider housing compromises necessary than those living in shared (47%), or rented (33%) accommodation. Clearly, those living independently of the family home, but not yet home owners, are experiencing or anticipate challenges around securing appropriate accommodation:

*“Accommodation here [has] some of the highest [costs] in the country. £575 a month for a one-bedroom flat. It’s disgusting.” (Young person from Argyll and the Islands aged 25-30)*

<sup>44</sup> HIE (2017) Stimulating Housing Development in the Highlands and Islands

7.44 However, for those living in the family home in particular, this likelihood increases with age. Around 11% of those aged 15-18 report that compromises on housing are necessary, but this increases to 28% for 25-30 year olds.

7.45 In terms of making compromises, 19% of young people feel they have already compromised on accommodation (Figure 7.7), highest in Argyll and the Islands (32%) and Lochaber, Skye and Wester Ross (25%), and amongst reluctant stayers (42%). Those at the older end of the target age range (25-30) are also more likely to have compromised on housing (25%), as have those living in shared accommodation (36%).

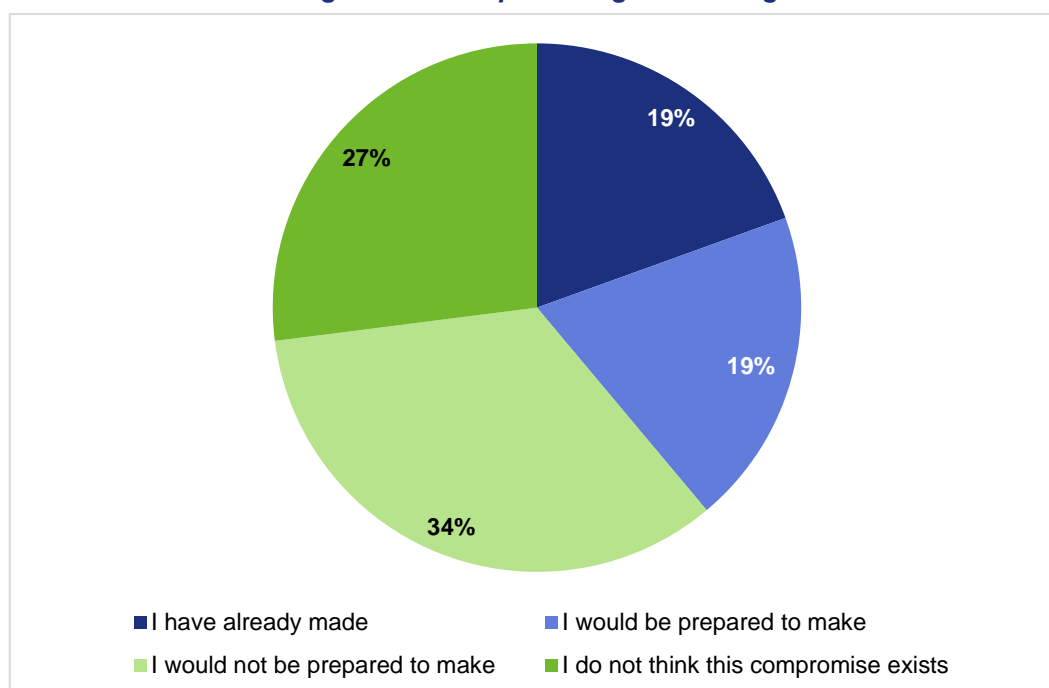
7.46 One contributory factor to housing compromise for some may be the lack of availability of rental properties in the region. This can limit the options available to young people:

*“In Orkney at least, the vast majority of people own their home, and the rental market is quite small...I think rental property in the Highlands and Islands in general is hard to come by for the most part, especially in small towns, villages, and rurally.” (Young person from Orkney aged 25-30)*

7.47 Although around a fifth of young people (19%) would be prepared to compromise on housing, just over a third (34%) *would not* (Figure 7.7). This is highest in Orkney (42%) and Moray (41%). Committed leavers (37%), potential returners (39%) and potential new residents (40%) are most likely to not be prepared to compromise on housing. Also, those aged 15-18 are most likely to not compromise.

7.48 Around a quarter of respondents (27%) did not feel there were compromises to be made on housing. This was highest in the Outer Hebrides (37%), Shetland (33%) and Orkney (32%), and for those aged 25-30 (28%). This was also higher in fragile areas where 31% did not feel housing compromises were necessary, versus 26% in non-fragile areas. Those living in their own home (41%) and committed stayers (31%) in particular did not think there were compromises to be made in terms of accommodation. In contrast, whilst a quarter of respondents who live in a family/parental home did not think accommodation compromises exist overall, almost half of 19-24 year olds (47%) and 38% of 25-30 year olds reported that they had already made such a compromise.

**Figure 7.7: Compromising on housing**



*Source: ekosgen survey of young people, 2018 (n=1,426, asked of all in the H&I who think H&I living requires compromises)*

7.49 The findings demonstrate that although this is not a universal challenge, the issues are complex and related to life stages of young people. Where compromises on housing are felt necessary, this is a significant issue. The prospect of compromising on accommodation may amplify the lack of availability, and lead to more young people leaving the area.

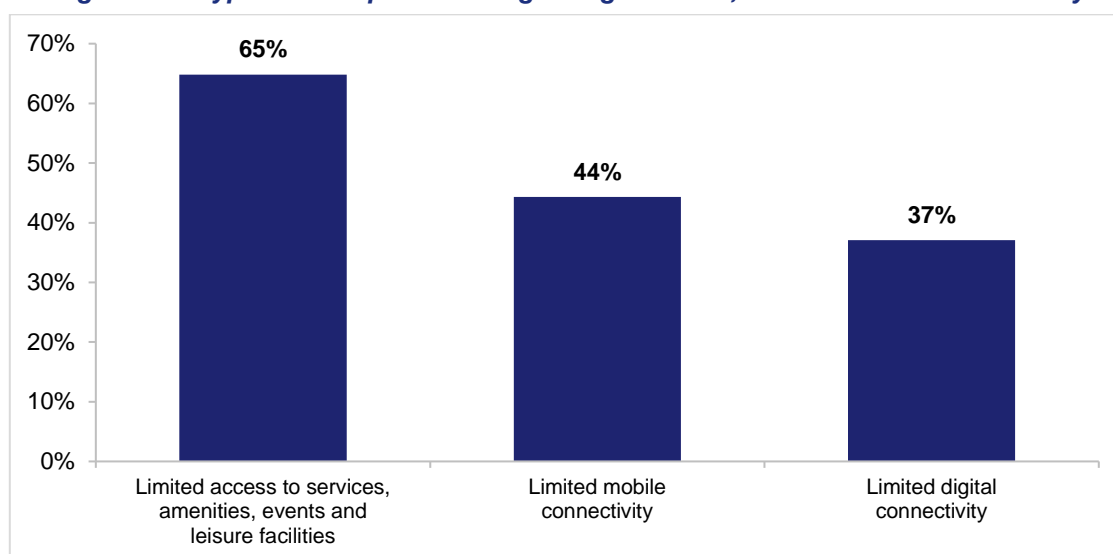
## LIVING COMPROMISES: SERVICES, AMENITIES, CONNECTIVITY

### Services and amenities

7.50 The research has illustrated the high levels of pride and affinity that young people have for their local communities, and the positive perceptions they hold. However, many still feel that their needs are not being fully met. While there is a good level of engagement with services and amenities, a range of accessibility and availability barriers exist – particularly in terms of transport to/from services and cultural amenities.

7.51 Consequently, compromising on access to cultural amenities and services is seen as necessary by the majority of young people in the region. Sixty-five per cent of respondents agree that people accept more limited access to events, services, amenities and leisure facilities when they live in the Highlands and Islands. This is highest in Caithness and Sutherland (75%) and Moray (72%). In contrast, young people in Shetland (58%) are least likely to agree that people compromise on access to services and amenities, as are young people in the Inner Moray Firth (59%), where there is arguably better access to services and amenities.

**Figure 7.8: Types of compromises regarding services, amenities and connectivity**



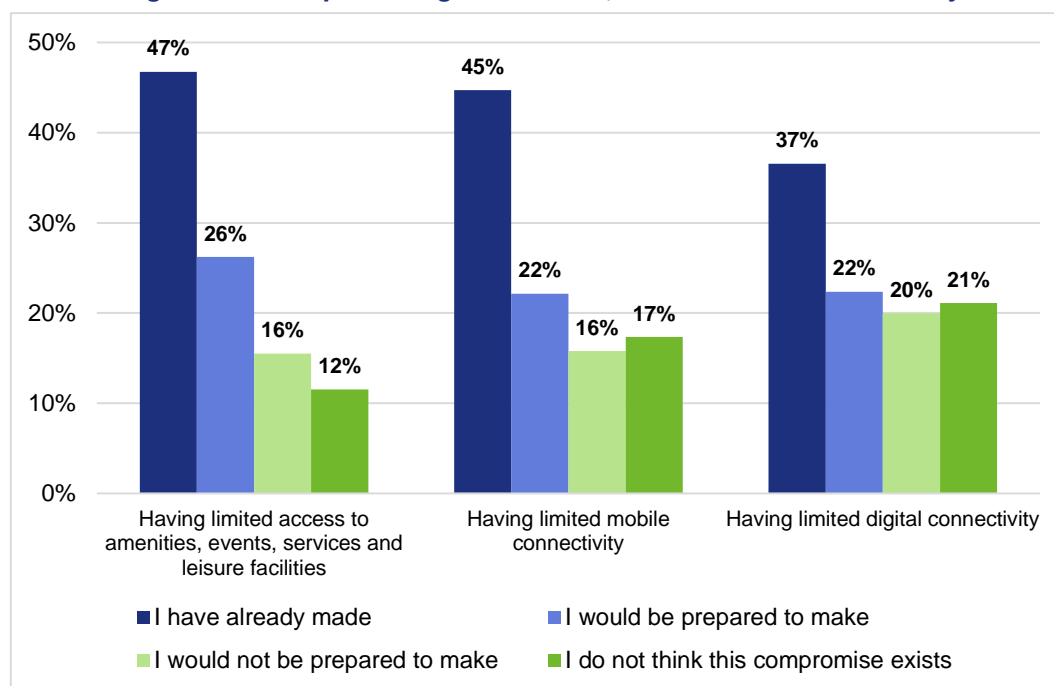
*Source: ekosgen survey of young people, 2018 (n=1,438, asked of all who think H&I living requires compromises)*

7.52 Compromising on access to a range of amenities, events, services and leisure facilities seems to be an accepted fact of life for many young people in the Highlands and Islands (Figure 7.9). Forty-seven percent feel that they already compromise on a limited range of services and amenities. This is much higher in fragile areas – 55% have done so, versus 44% in non-fragile areas (Figure 7.10). Those in Caithness and Sutherland are most likely to state that they have made compromises on having limited access to amenities, events, services and leisure facilities (62%), followed by Argyll and the Islands (52%).

7.53 Committed and reluctant stayers (53% and 60% respectively) are more likely than committed and reluctant leavers (38% and 45%) to have made compromises on access to services and amenities.

Females (48% versus 39%) are more likely to have made such compromises, as have younger people at the upper end of the target age band – 54% of young people age 25-30 have done so, versus 46% of 19-24 year-olds and 26% of 15-18 year-olds.

**Figure 7.9: Compromising on services, amenities and connectivity**



Source: *ekosgen survey of young people, 2018 (n=1,337, asked of all in the H&I who think H&I living requires compromises)*

## Connectivity

7.54 The 2015 Attitudes and Aspirations research highlighted that almost two thirds of young people rated mobile (3G/4G) connectivity access poorly. Broadband was rated slightly better in terms of speed and reliability (accessibility was not explored in 2015). However, since the study, there has been a shift in policy focus. The Scottish Government's commitment to reach every home and business with superfast broadband by 2021 – R100 – is a key component of the Digital Strategy, and has £600 million of initial investment.<sup>45</sup> There is also greater focus on improving mobile connectivity in the Highlands and Islands and elsewhere, with the Scottish 4G Infill programme delivering future-proofed mobile infrastructure and services in mobile "not spots".<sup>46</sup>

7.55 The evidence from the 2018 research indicates that there has been some improvement, though around 44% of respondents still feel that living in the Highlands and Islands means accepting limited mobile connectivity, and 37% feel that there is limited broadband connectivity (Figure 7.8). Males are more likely than females to perceive this (51% and 42% for mobile and broadband connectivity respectively). The perception that there are compromises necessary on connectivity also increases with age: perceptions of compromises on digital connectivity rise from 30% amongst those aged 15-18 to 43% for those aged 25-30, and from 39% to 47% regarding perceived compromises on mobile connectivity.

7.56 Young people in fragile areas are much more likely than those in non-fragile areas to perceive the need for compromise on mobile (56% vs 42%) and digital (49% vs 35%) connectivity, as do those living in the Outer Hebrides (59% and 46% respectively), Argyll and the Islands (51% versus 47%) and

<sup>45</sup> <https://www.gov.scot/publications/reaching-100-superfast-broadband/>

<sup>46</sup> <https://www.gov.scot/policies/digital/broadband-and-mobile/>

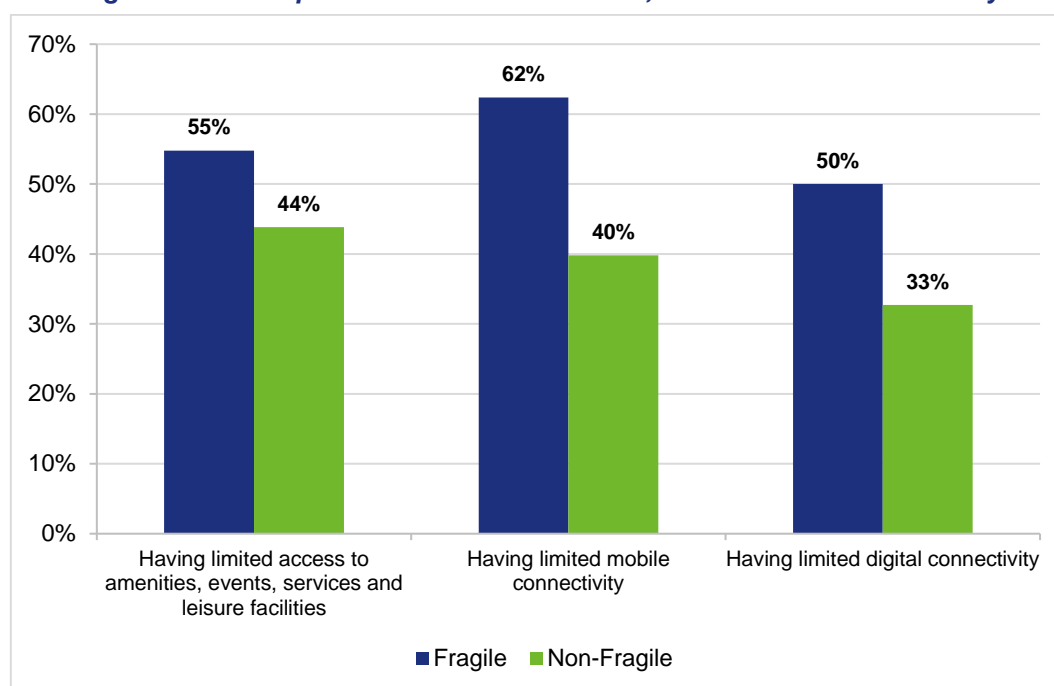
Shetland (53% compared to 41%). Connectivity, especially mobile connectivity, remains a major “push” factor for young people, particularly in more remote areas of the region.

7.57 In terms of making compromises on connectivity, around 45% of young people feel they have compromised on access to good mobile connectivity to live in the Highlands and Islands (Figure 7.9). A smaller proportion (37%) consider that they have forgone good broadband access to do so. Reluctant leavers are most likely of the segmentation groups to have made compromises on mobile connectivity (48%), but committed stayers are most likely to have compromised on mobile connectivity (40%).

7.58 Young people in the Outer Hebrides are most likely to state that they have compromised on mobile connectivity (60%). Those in Shetland are most likely to have made compromises on digital connectivity (52%). A high proportion of young people have also made compromises on connectivity factors in Argyll and the Islands (45% digital, 47% mobile), Caithness and Sutherland (47%, 52%) and Lochaber, Skye and Wester Ross (40%, 50%).

7.59 As with perceptions on compromises relating to access to services and amenities, young people in fragile areas are more likely to have made compromises. The difference in the proportion of young people that feel they have already compromised on such factors is most pronounced for mobile connectivity, where there is a difference of 22 percentage points (Figure 7.10).

**Figure 7.10: Compromises made on services, amenities and connectivity**



Source: ekosgen survey of young people, 2018 (n=1,426, asked of all in the H&I who think H&I living requires compromises)

7.60 This reinforces the messages regarding barriers to accessing services and amenities discussed in Chapter 6. When considering that 92% of young people think that leavers do so to broaden their life experience and world view, it is clear that the limitations of the leisure, amenities and connectivity offering for young people in the Highlands and Islands can be a major driver for young people to seek education and employment opportunities elsewhere.

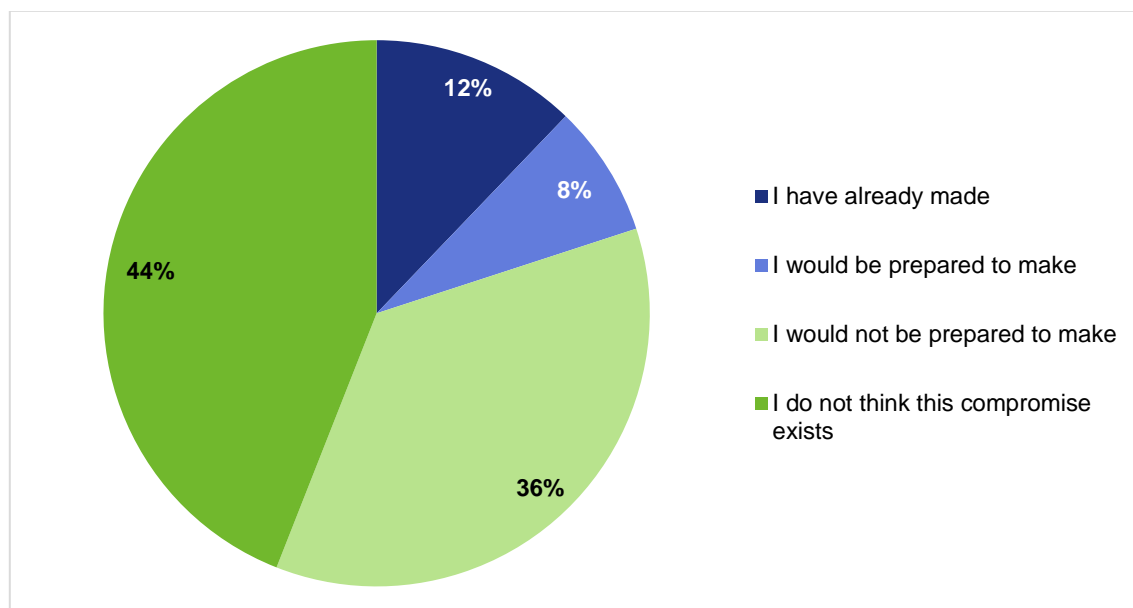
## QUALITY OF LIFE AS A COMPROMISE?

7.61 In sharp contrast to the range of factors viewed, perceptions around compromise on quality of life are much more positive. Just 12% think that people generally compromise on quality of life. Whilst around 20% feel that they have either made or would be willing to make a compromise in terms of quality

of life, more than twice as many (44%) feel is an area where no compromise exists (Figure 7.11). Respondents from fragile areas (52%) and the islands areas in particular – in Shetland (60%), the Outer Hebrides (51%) and Orkney (50%) – are much more likely to agree that there is no compromise to be made in terms of quality of life to live in the region. Quality of life in the Highlands and Islands is clearly valued by young people, and considered a strength of the region:

*“I much prefer to live in the Highlands as the lifestyle is suited for me and I don't think I could live long-term in a city environment.” (Young person from Lochaber, Skye and Wester Ross aged 19-24)*

**Figure 7.11: Compromising on quality of life**



Source: ekosgen survey of young people, 2018 (n=1,426, asked of all in the H&I who think H&I living requires compromises)

## ENABLING OPPORTUNITIES FOR YOUNG PEOPLE

7.62 In the 2015 Attitudes and Aspirations research, a range of factors were identified as very important in making the Highlands and Islands an attractive place for young people to live, work and study. This included high-quality jobs (68%); opportunities for career progression (64%); good access to housing (62%); good access to further/higher education (61%); and affordable transport links (61%). The 2018 study sought to explore, in slightly greater detail, both the economic and the social factors that young people seek.

### Economic factors

7.63 Employment-related factors remain critically important in attracting and retaining young people (Figure 7.12). The vast majority of respondents see all listed factors as essential or desirable for increasing the region's attractiveness for young people.

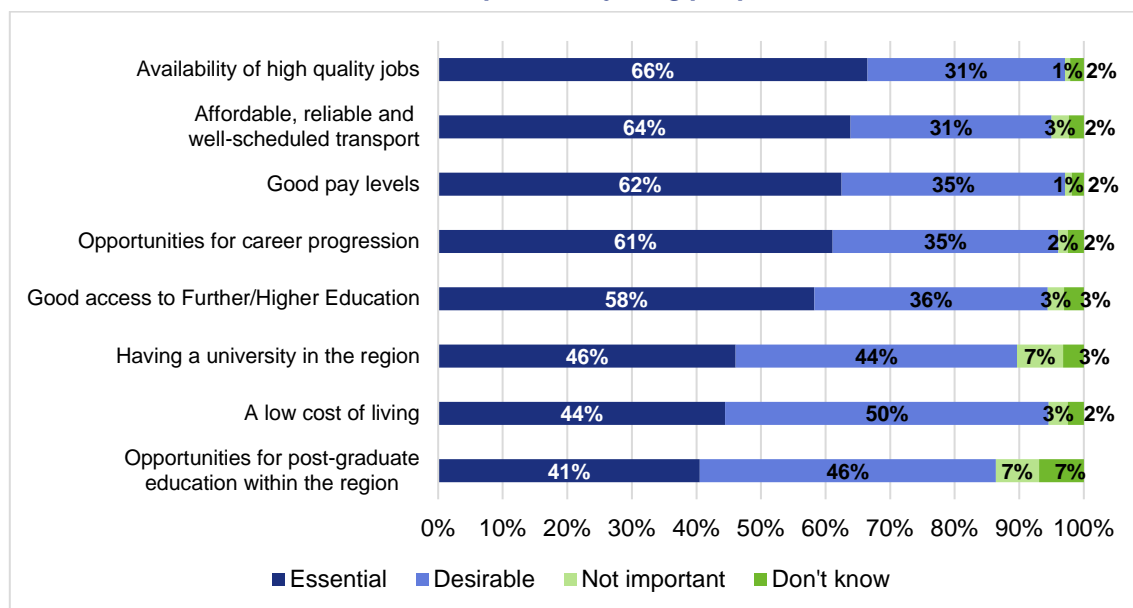
7.64 High-quality jobs (66%), transport (64%), good pay levels (62%) and career progression opportunities (61%) are identified as being most essential to make the region an attractive place for young people (Figure 7.12). These findings are consistent with the 2015 Attitudes and Aspirations research. Living costs are important overall, though somewhat more people consider them to be desirable (50%) rather than essential (44%).

7.65 Education-related factors are viewed as important. For many, good access to college or university (58%) and having a university in the region (46%) play a crucial role in ensuring the Highlands and Islands can cater for young people. Respondents from Orkney are slightly more likely to highly rate

education factors. Young people in the Inner Moray Firth and Moray are more likely to rate having a university in the region as essential to making the Highlands and Islands a more attractive place for young people to live in.

7.66 Though females and older age groups of young people are more likely to rate economic factors as either essential or desirable, there is little discernible difference between areas in the region, and between fragile and non-fragile areas. Reluctant leavers are most likely to rate employment and education factors highly in terms of importance. Reluctant stayers are most likely to rate a low cost of living as essential (55%).

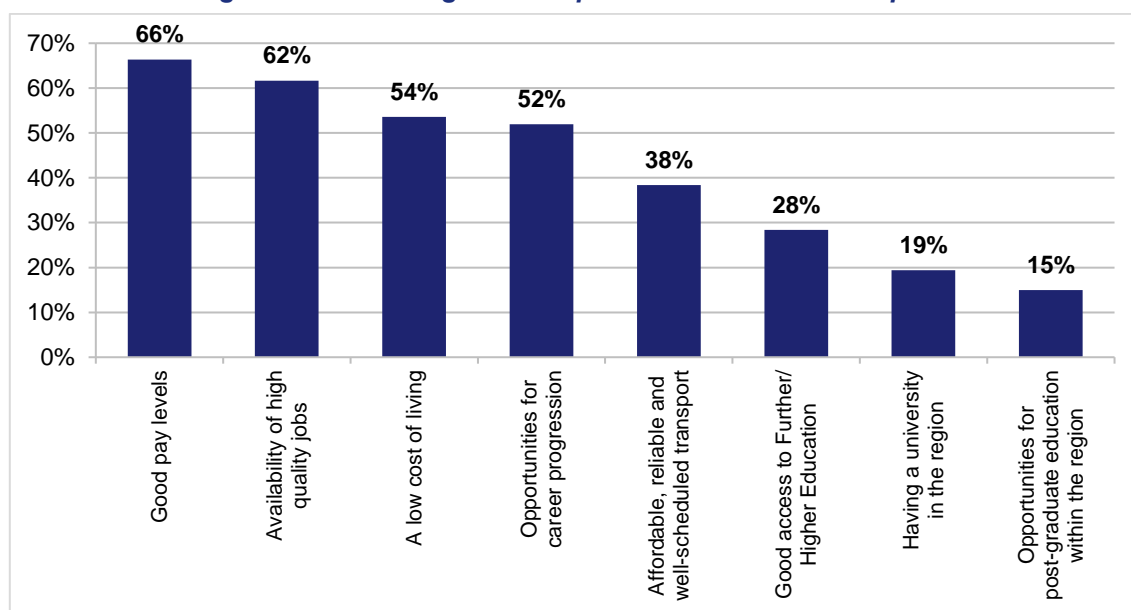
**Figure 7.12: Importance of economic aspects in making the Highlands and Islands a more attractive place for young people to live in**



Source: ekosgen survey of young people, 2018 (n=1,842)

7.67 Reflecting the factors seen as most essential, when ranking economic factors, employment-related factors, as well as cost of living, dominate (Figure 7.13). In citing the top three economic factors of importance, two-thirds (66%) identified good pay levels, and three in five (62%) selected high-quality jobs. This was followed by low cost of living (54%) and opportunities for career progression (52%). Educational factors emerged lower in the ranking. This pattern of ranking is broadly similar across all groups, between genders, and across sub-regional areas in the Highlands and Islands.



**Figure 7.13: Ranking of the importance of economic aspects**

Source: ekosgen survey of young people, 2018 (n=1,828)

## Social factors

7.68 There was clear evidence through the 2015 Attitudes and Aspirations study that, alongside economic considerations, a number of social factors were also considered by young people to be important to making the Highlands and Islands an attractive place for young people. These continue to be important to young people (Figure 7.14). Unsurprisingly, the majority of survey respondents (75%) consider quality of life as essential to make the Highlands and Islands more attractive to live in. Of other factors, 72% view good healthcare and 70% access to affordable housing as essential.

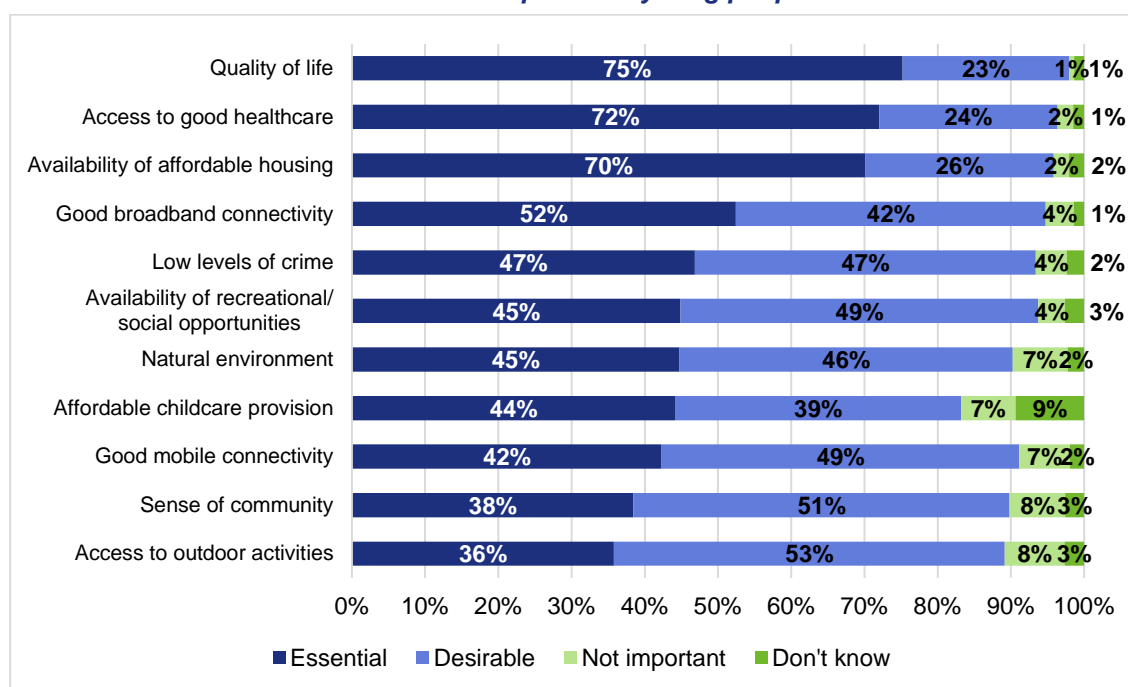
*"I am lucky in that I live in good quality, affordable social housing which is a result of local industry. I am well aware that this is not representative across the Highlands and Islands... it's fairly apparent that providing good quality (and more emphasis needs to be put on this), affordable housing can be the basis of solving a whole number of issues affecting young people in the Highlands and Islands." (Young person from Caithness and Sutherland aged 25-30)*

7.69 More females consider social factors essential, as do older age groups – and particularly 25-30 year olds. Somewhat fewer committed leavers rate social factors as essential, but more reluctant stayers do so.

7.70 There are some geographical variations. Those in the Outer Hebrides are more likely to consider social factors as essential overall. Young people in Lochaber, Skye and Wester Ross and in the Outer Hebrides are more likely to consider that sense of community is essential (50%), whilst more young people in Orkney (50%) think that low levels of crime are essential than regionally. Additionally, all respondents in Orkney see quality of life, as well as access to healthcare, as either essential or desirable. Interestingly, young people in Shetland are most likely to consider that access to affordable childcare is essential (57%).

*"I just wish it was made easier for young people to live here. When you have young people wanting to stay and work in Highlands and Islands, why would it be made so hard?" (Young person from Lochaber, Skye and Wester Ross aged 25-30)*

**Figure 7.14: Importance of social aspects in making the Highlands and Islands a more attractive place for young people to live in**

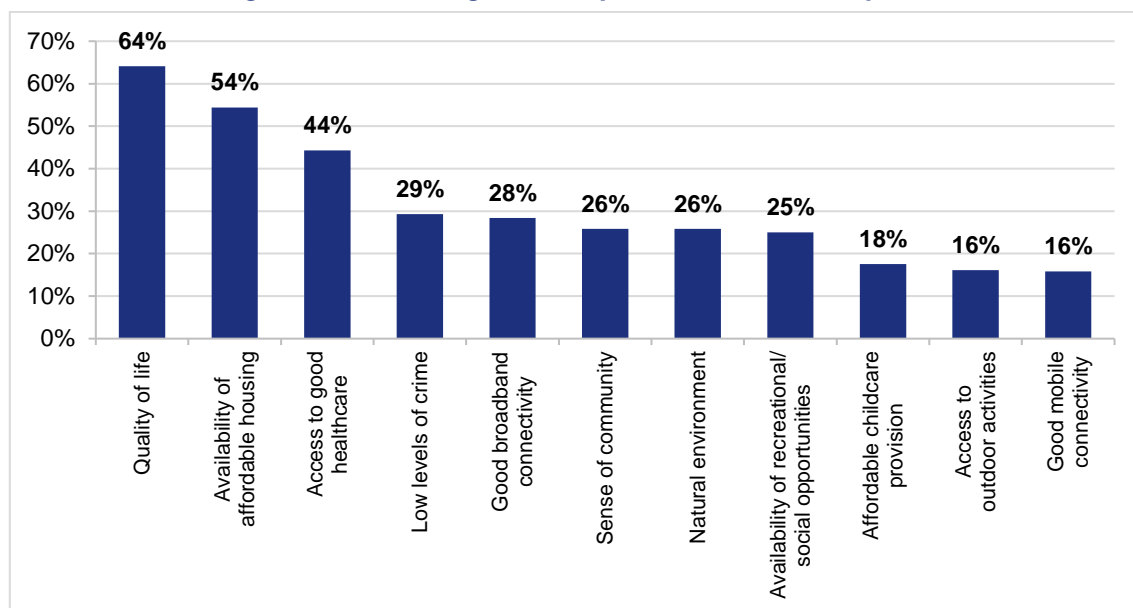


Source: ekosgen survey of young people, 2018 (n=1,834)

7.71 In ranking the importance of the social factors, quality of life (64%), availability of affordable housing (54%) and access to good healthcare (44%) are cited most frequently (Figure 7.15). This pattern of ranking is broadly consistent, except for in Caithness and Sutherland, where young people rate access to good healthcare (77%) as more important than availability of affordable housing (62%).

7.72 What this demonstrates is that the high level of importance ascribed to social aspects demonstrates the importance of the “sticky stuff” – the factors that sit behind the economic drivers that serve to attract and retain talent in the first instance, and will help to anchor young people in an area, whether they choose to stay in, come to or return to the region. This will ultimately make it easier for young people to stay in Highlands and Islands. This is a key consideration for HIE and strategic partners.

**Figure 7.15: Ranking of the importance of social aspects**



Source: ekosgen survey of young people, 2018 (n=1,803)

## 8 CONCLUSIONS AND FUTURE CONSIDERATIONS

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### INTRODUCTION

8.1 The preceding chapters set out the analysis of the evidence from the 2018 research into young people and the Highlands and Islands. Across each of the chapters that deal with specific thematic policy areas, the report identifies the factors that influence the aspirations of young people regarding studying, working and living in the region. This chapter sets out the conclusions drawn from this analysis. It details the key findings across the relevant policy areas under consideration, and sets out areas for future consideration for HIE and its strategic partners.

### CONCLUSIONS

8.2 There continues to be a deficit of young people in the Highlands and Islands, and the proportion of young people is projected to decrease further over the next 20 years or so. Outward migration of young people continues to be a concern for the region.

8.3 Since the publication of the 2015 Attitudes and Aspirations research, there have been a number of key policy developments and areas of focus/activity that have sought to address the challenges identified by the research, such as the establishment of a Talent Attraction, Retention and Return Forum tasked with implementing a talent attraction, retention and return strategy. Some recent initiatives also offer opportunities through which to address these challenges, such as the Inverness and Highland City Region Deal, and the proposed growth deals for Argyll and Bute, Moray and the Islands.

### Staying and leaving

8.4 Given the challenges around retaining and attracting talent, the 2015 Attitudes and Aspirations research recommended that policy interventions were targeted in the first instance on the needs of reluctant leavers, and on potential returners. This would act to address the most immediate barriers to staying or returning, and be the most efficient use of available resources. It was also recommended that potential new residents could be targeted through new education and employment opportunities. An important aspect of this activity was the promotion of positive reasons for staying.

8.5 As a region-wide approach to ensuring the skills demand of employers is met, the Talent Attraction, Retention and Return Strategy, and associated Action Plan, is considered to be a good basis for attracting people to the area. The Highlands and Islands Skills Investment Plan (SIP) underpins this activity, providing a robust evidence base on skills gaps and shortages for key sectors in the region.

8.6 The research demonstrates that the region is increasingly attractive to young people, with an increased proportion of young people stating an intention or preference to stay. 'Stayers' are also viewed more positively by their peers. This suggests that though many interventions are at an early stage, they are beginning to have a positive effect on the aspirations of young people in the region.

8.7 However, there is evidence to suggest that more local tailoring of interventions is necessary to ensure more effective implementation. National policies are often difficult to translate, particularly to more remote parts of the region, whilst significant differences at a local level mean that regional policies are not always relevant across all areas. There is a need for more localised solutions and geographically targeted activity below the regional level. This could help to increase the proportion of young people that see themselves living and working in the Highlands and Islands in the future, rather than simply somewhere in Scotland.

8.8 More can also be done to attract returners or potential new residents, as a key component of talent attraction and retention. For example, there is an identified gap in DYW activity. This is perceived to be overwhelmingly focused on young people already living in the region. This could be expanded to include those who have recently finished FE or HE elsewhere in Scotland, as a defined target market

segment. ScotGrad is one example where this has been done effectively, but it could be expanded, as noted below. In addition, replacement and expansion demand for skills in the Highlands and Islands will require substantial levels of in-migration and so attracting people in to the region will be important.

## Education

8.9 The educational offering across all levels and institutions in the region was identified as a particular barrier in 2015, and it was previously recommended that subject and mode of delivery was broadened across secondary and tertiary education. The 2015 report also noted that awareness of the existing offer needed to be raised, as well as identifying specific opportunities to be maximised, such as remote learning and establishing Oban as a university town.

8.10 UHI and other academic institutions in the region have demonstrably developed and expanded their curricula in the short period since 2015. It is considered more relevant to industry, and there is recognition that there is more of a focus on horizon scanning and future economic need for the region's growth sectors. This expanded curriculum has resulted in an increased number of students. Other successes for UHI have included a strong performance in the 2018 National Student Satisfaction Survey, where it outperformed the University of Strathclyde, University of Glasgow, University of Edinburgh and Glasgow School of Art.

8.11 This expansion of the curricula is evident in the findings of the research. Young people view the education offering in the Highlands and Islands more positively than in 2015, and those who leave to pursue education opportunities do so primarily for a change in lifestyle. However, there is still a perception that subject range available at school limits employment and career choices, particularly in more remote parts of the region. Further expansion of online delivery, distance learning, and networking of courses across UHI's partner institutions can help in this regard. Stakeholders felt that there was scope for further alignment of skills and training with industry need. Additionally, there is a perception that both UHI and employers need more profile and engagement within schools.

8.12 Consultees identified a number of Inverness and Highland City Region Deal projects as being important to meet the skills and education needs of key sectors in the region. The Science Skills Academy and Northern Innovation Hub are ideally placed to address sectoral skills shortages and gaps through strands of activities aimed specifically at young people. More broadly, STEM development work is considered useful for aligning young people's skills with available employment opportunities.

8.13 However, there is a concern that some aspects of the Inverness City Region Deal are overly Inverness-centric, rather than covering the whole of the Highland area. Consequently, other parts of the Highlands beyond the Inner Moray Firth, and indeed elsewhere in the region, could benefit from extending or replicating the delivery of initiatives such as the Northern Innovation Hub.

8.14 A further education recommendation of the 2015 Attitudes and Aspirations research was to develop vocational pathways into employment through apprenticeships. Work-based learning is highly valued by employers as providing skills development for staff in the workplace that is considered to be more effective and aligned to working practices. Consequently, there is increasing demand for vocational training, highlighted by a number of recent skills reviews. However, whilst most young people are aware of the existence of apprenticeships, for many they remain less attractive than more conventional, academic education routes. Opportunities for work-based learning and vocational training should be actively promoted, to increase both the awareness and attractiveness of apprenticeships in the Highlands and Islands – and particularly amongst older age groups of young people. This will ultimately offer a greater range of employment opportunities to young people. Further, some employers should be encouraged to think about vocational qualifications as well as graduates to help meet skills demand.

8.15 There is also a need to promote certain sectors and pathways to young people. For example, there is an identified need for local initiatives to fill NHS posts, which could involve the NHS working with schools and FE and HE providers to raise awareness of career opportunities in health and social care.

## Employment

8.16 A key challenge for HIE and partners in recent years has been to increase the diversity of employment *and* career progression opportunities in local areas, and to raise awareness of such opportunities in priority sectors. This was recognised through the 2015 report's recommendations. There is increased awareness of opportunities available to young people, and a strong desire to work in the region. However, the lack of opportunities, and having to compromise on the range of opportunities – and the perceived salary and career limitations that are associated with this – remains a critical barrier to retaining and attracting young people, despite some evidence to suggest that the variety of opportunities is improving.

8.17 This is particularly the case for graduate posts. The perception that there is a greater variety of posts at higher salaries available elsewhere is a significant push factor, making the region comparatively unattractive for young people leaving higher education.

8.18 ScotGrad has worked well in providing employment opportunities to young people, and many young people are retained by their employer after having completed the programme. However, the numbers progressing into employment through this route are relatively limited, despite it being held in high regard by young people and stakeholders. Boosting the uptake of ScotGrad can help to widen access to graduate employment opportunities.

8.19 The 2015 report also recommended that work should be undertaken to encourage greater levels of entrepreneurship amongst young people. This is a major focus of innovation and entrepreneurship policy at the national level. Although more than half of young people expressed a degree of interest in self-employment, many fewer see it as a viable long term employment aspiration. There is clearly some untapped potential here that, if the barriers can be addressed, could mean that more young people would establish and run their own business. Barriers tend to be around lack of confidence, cost and access to finance, and having a business idea. There is also a perception amongst some stakeholders that the perceived status of self-employment and running a small business amongst young people is relatively low, and there is room to promote the value of entrepreneurship in education leavers.

8.20 An important part of raising awareness of a variety of opportunities will be influencing the influencers – parents and teachers – to increase their awareness of opportunities outside of university, as well as encouraging employers to think about vocational as well as graduate level qualifications.

8.21 Whilst good quality careers advice is delivered in the Highlands and Islands, this needs to be delivered more consistently. It is important that young people and teachers are aware of opportunities within the wider region, not just the immediate locality. This will help to promote the idea that young people can stay and work in the Highlands and Islands throughout their careers. It may also help address negative perceptions around major sectors in the region, such as Hospitality.

## Housing

8.22 HIE's *Stimulating Housing Development in the Highlands and Islands* research identified the need to put in place measures to increase the supply of affordable housing and properties for rent, as well as to extend community land ownership and self-build schemes. This was also a key recommendation of the 2015 Attitudes and Aspirations research.

8.23 Suitable and affordable accommodation is still seen as one of the main barriers to studying and working in the region although it is heavily influenced by life stage and experience as demonstrated in Chapter 7, with many young people still living in the family home. Consequently it is not a universal issue for young people: the results overall show that this is less of a compromise for young people than expected but where it is a compromise, it is a significant challenge. This is demonstrated through its ranking as the second most important social factor to making the region attractive to young people to work, live and study in. Housing for young people is therefore still a significant issue in the region, and

this should not be understated. Affordable housing is still seen as an essential component of an attractive region for young people.

8.24 Housing developments through the Inverness and Highland City Region Deal are seen as important for attracting and retaining young people in the region. Similar proposals are anticipated in forthcoming growth deals in the region, such as the proposed Islands Housing Fund in the Islands Deal, and affordable housing proposals in the Moray Growth Deal.

8.25 Despite the increasing high-profile nature of the housing challenge, stakeholders are not convinced that there has been significant progress in this area. Anecdotally there have been suggestions that increased tourism through attractions such as the North Coast 500 have made the rental market even more challenging as properties are being used as Airbnb/holiday lets rather than offering long term leases.

## **Transport, infrastructure and connectivity**

8.26 Transport underpins access to a wide range of opportunities for young people, as well as others in the Highlands and Islands. Recommendations to improve the availability, timetabling and affordability of public transport acknowledged the difficulty of doing so in an area characterised by low population density and challenging geographies. It is therefore unsurprising that transport is a barrier for many young people in more rural areas, and that the factor on which young people are most likely to have compromised. It remains an important issue, whether for access to employment or education, or for social opportunities, including addressing social exclusion and isolation.

8.27 There remains considerable scope to boost opportunities for flexible working with employers, exploiting ongoing measures to extend and improve broadband and mobile coverage. Flexible working is an important offer to young people. Greater consideration needs to be given to how the potential of this could best be harnessed. Some sectors are increasingly recognising the role that flexible working practices can play in attracting workers to previously hard-to-fill roles. The HIE Business Panel survey published in July 2018<sup>47</sup> shows that, at 48%, recruiting new staff in the medium to long term is the key skills-related concern for employers. Amongst those Business Panel members who have recruited or tried to recruit young talent, at 31%, less than a third found it easy while almost two thirds (65%) found it difficult.

8.28 Limitations to digital and mobile connectivity for young people is an area of significant compromise. This contributes to young people seeking opportunities outside the region. However, it is one that is being very actively addressed through current initiatives and so there will be considerably improvements going forward.

## **Community and culture**

8.29 Young people have a very positive perception of their local community or town, and a good level of community participation, demonstrating the strength of communities across the Highlands and Islands. However, community participation has fallen slightly since 2015, suggesting that activity in response to recommendations that strategic partners promote the engagement of young people in communities has had limited impact. The fact that the needs of young people are not being fully met in their local community, particularly in areas such as Caithness and Sutherland, is contributing to this, and is a cause for concern.

8.30 Despite a good level of engagement with arts, leisure and culture amenities, particularly amongst young people from the island communities, barriers to accessing arts, leisure and culture offers

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<sup>47</sup> <http://www.hie.co.uk/regional-information/economic-reports-and-research/archive/hie-business-panel-survey---workforce--skills-and-young-talent.html>



exist. These barriers are more to do with accessibility (e.g. availability, cost and transport to the offer) rather than quality or interest.

## MAXIMISING OPPORTUNITIES: FUTURE CONSIDERATIONS

8.31 Overall, the message from this 2018 study into the changing attitudes and aspirations of young people in relation to the Highlands and Islands is a positive one. There is evidence of improvement across a range of factors, even in the short period since the 2015 Attitudes and Aspirations research. The evidence suggests that the interventions put in place by HIE and its strategic partners are making a difference to young people.

8.32 There are some strong findings in the report for HIE and partners to capitalise upon. Two stand out. Firstly, young people consider that the quality of life in the Highlands and Islands is excellent and not something they need to compromise on. The importance of this cannot be understated. Secondly, when identifying features that make the Highlands and Islands an attractive place to live, work and study in, there is a clear preference amongst young people for:

- Longer-term economic considerations: high-quality, well-paid job opportunities with good career progression prospects, and a relatively low cost of living; and
- Social elements that enhance life in the region, particularly quality of life, affordable housing, and access to essential services such as good healthcare.

8.33 Though challenging to address, these factors can underpin all other considerations in ensuring that the region is in the best position to respond to the aspirations of young people. It should also drive longer-term policy to ensure that policy interventions to meet the needs of young people are 'future-proofed'.

### Existing policies and interventions

8.34 It should be noted that many current interventions directly (or indirectly) addressing barriers and opportunities for young people are at an early stage, with a number only being in place for a year or so. Consequently, it makes sense to not substantially change any approaches being taken to broaden opportunities for young people to live, study and work in the region. These interventions should be given the necessary time to have a demonstrable impact.

8.35 It should also be noted that there has been a shift in focus in terms of talent attraction, retention and return, away from an almost exclusive focus on young people to focusing on the entire working age population more broadly. However, there remains a need to continue to factor young people into policy decisions and interventions. The deficit and continued out-migration of young people is a major component of demographic change in the region, and strategic partners should not lose sight of this.

8.36 Young people should continue to be factored in to all aspects of policy and strategy. One way to ensure this is to involve young people in service and policy design. The Year of Young People has seen greater involvement of young people in the planning and design of events and activities. There is scope to continue this and give this degree of involvement more traction on a more permanent basis, by getting young people more regularly involved in policy design activities. It could also have positive implications for community participation, including in local democracy.

### Regional approaches, local tailoring

8.37 There is scope to capitalise on the extensive intelligence of skills demand and supply for the region provided by the Highlands and Islands SIP, Regional Skills Assessments and additional sectoral work undertaken by HIE and partners. This could be done through the development of more locally-based SIPs, targeting specific geographies and key sectors. This would help to develop a more bespoke approach to identifying and addressing skills challenges, and better inform local policy response.

8.38 This should be done within a regional framework or similar for skills and workforce planning, to help retain skills within the region, rather than just within local areas. There is a criticism that workforce planning at a local level can be counterproductive. Ensuring collaboration at regional level should result in a more strategic and effective approach to attracting and retaining skills within the Highlands and Islands.

8.39 The Talent Attraction, Retention and Return Strategy should be further developed, with specific young people segmentations targeted. The offer to potential returners, potential new residents and reluctant leavers should be carefully articulated. There is a clear role for DYW groups here. They are best placed to package such an offer for those living outside the area to return or move here for the first time, alongside their work developing opportunities already within the region. HIE's Regional Skills Manager is ideally positioned to facilitate this activity, ensuring that there is a co-ordinated approach taken at the regional level.

8.40 Consideration should be given to how the Inverness and Highland City Region Deal projects can effectively permeate the rest of the region. Many projects are pan-Highland, but there is a perception that delivery is very Inverness-centric. Highland Council, HIE and other partners should ensure that the benefits of projects such as the Northern Innovation Hub are realised across the area. Further, whilst other parts of the region are progressing their own growth deals, HIE and partners should explore how best to transfer learning from Inverness and Highland City Region Deal delivery for the benefit of the whole of the Highlands and Islands.

## **Studying in the Highlands and Islands**

### ***Further and higher education***

8.41 There has been a step change in the breadth of the FE and HE courses on offer in the region. UHI's work on horizon scanning activity has helped in this regard. However, there is still scope to further improve this, as demonstrated by the perceptions of young people. Subject range needs to be as wide as possible.

8.42 UHI, partner colleges and other academic institutions need to work better with SDS and with employers to better match FE provision to the needs of local and regional economies, and ensure that skills and training provision is much more agile in responding to industry need, and taking advantage of emerging opportunities.

8.43 Remote learning and networking of courses throughout UHI's partner institutions and local centres has an important role to play in broadening access to learning and education opportunities, including for schools. This should be supported and expanded to further its reach, particularly in more remote and fragile areas.

### ***Apprenticeship family***

8.44 Work-based and vocational learning is highly valued by employers as providing skills development for staff in the workplace that is considered to be more effective and aligned to working practices. There is scope to better promote the value and relevance of apprenticeship family qualifications amongst young people. Some apprenticeships are already delivered on an outreach basis across the region, and this can be an effective means through which to broaden the education offer in remote areas.

## **Education and employment advice**

8.45 School teachers and other influencers (e.g. family) may not have full or up-to-date knowledge of the employment and career opportunities available to young people across the region. There is a need to better influence the influencers. Providing current and relevant *regional* labour market intelligence (LMI) to careers advisors can help to raise awareness of wider regional opportunities outside their catchment or local authority area. There is scope also to engage with a wider range of stakeholders

and actors to challenge mindsets regarding education pathways, and better promote employment and career opportunities – especially through non-academic pathways. This will require a strong partnership approach.

## **Working in the Highlands and Islands**

### ***Routes to employment***

8.46 An important aspect of widening employment opportunities in the Highlands and Islands is to broaden routes to employment. There is scope to undertake complementary activity to promoting apprenticeship routes to young people, and work with employers to diversify recruitment practices. There remains a strong emphasis on degree-level qualifications amongst businesses, to the detriment of other equally relevant qualifications.

8.47 A change in recruitment and training practices amongst employers to give greater credence to Graduate Level Apprenticeships, '2+2' routes where students articulate from HNCs/HNDs to degrees, etc. will help to broaden employment opportunities for the region's young people, as well as ensure parity of education routes to employment. This may also help to boost "middle ground" opportunities in skilled trades in areas characterised by low and/or high-skills level employment opportunities.

8.48 Despite the success of ScotGrad in enabling employment, there is scope to continue to boost uptake of this scheme. HIE, SDS and partners should explore opportunities to expand uptake of graduate placements in the region through ScotGrad.

8.49 Entrepreneurship and self-employment should be more widely promoted and encouraged as a viable route to employment. Self-employment opportunities are relatively widespread in the region, yet young people tend not see this as an option.

8.50 Opportunities for remote working are slowly increasing in some sectors as businesses are recognising the benefits. To exploit these and meet the demand for flexible and remote working amongst young people will require employers to be open to the benefits of remote working for attraction and retention. The HIE Business Panel survey identified that 66% of businesses in the Highlands and Islands are offering flexible working to help retain young talent which will include remote working opportunities. There is a role for all strategic partners to identify ways in which this can be further developed and enabled – and then to connect young people to flexible and remote working opportunities.

### ***Promoting sectoral opportunities***

8.51 There are also a range of key sectoral developments that can be exploited to provide a wider range of employment opportunities for young people. This includes recent work that identified significant opportunities to maximise the Marine Economy in the region (MAXiMAR). Workforce development and routes to employment for education leavers will be key to realising its potential. Renewable energy in the Highlands and Islands also offers employment opportunities through both construction and operation and maintenance. There are also some large-scale schemes currently under development. For example, the proposed development of an alloy wheel factory adjacent to the aluminium smelter in Fort William offers a potentially significant employment opportunity for young people in Lochaber, Skye and Wester Ross. Additionally, there will also be opportunities across early learning and childcare and social care, as high-volume sectors that will see considerable growth as demand increases. The current HIE Operating Plan is well placed to ensure these sectors and employment opportunities are viable avenues for the region's young people.

8.52 For many of these sectors, there is a need to 'reposition or rebrand', to overcome outdated and misplaced perceptions which persist for example in aquaculture and engineering, it is often assumed that the roles and occupations are not suitable for women. Strategic public-sector partners and employers have a role to play in creating positive perceptions to engage young people and diversify

workforces where there is an imbalance and where groups are underrepresented. This can also help to address issues of gender segregation evident in a number of sectors and roles.

## **Living in the Highlands and Islands**

### ***Infrastructure***

8.53 The importance of the necessary infrastructure to underpin employment opportunities, and particularly housing and transport, is recognised by HIE and other strategic partners. Recent policy responses to increase the supply of affordable housing and properties to rent should continue to be actively promoted, particularly in light of development proposals in some areas. Multi-agency partnership working and co-ordination to address transport infrastructure and provision challenges can also help to address barriers to employment and learning.

### ***Amenities, services and culture***

8.54 The importance of the cultural offer, services and amenities available to young people in local areas should not be underestimated. Improvement of the offer, particularly in areas such as Caithness and Sutherland, should be supported to meet the needs of young people in the region. This is vital to ensure that the social factors in the Highlands and Islands are sufficient to help retain young people. Given there has been a fall in the proportion of young people feeling that their communities are not fully meeting their needs, HIE and partners should investigate this further to ensure that the needs of young people are being fully met within their communities.

## **Taking a longer-term strategic approach**

8.55 Following the 2015 Attitudes and Aspirations research, there has been a concerted effort to factor in the needs of young people in policy interventions designed to improve the economic fortunes of the Highlands and Islands. The findings from over 3,100 young people demonstrate that there has been some success in a relatively short period of time.

8.56 To ensure continued success, there is a need to take a longer-term strategic approach. Young people are motivated by long-term considerations; as such, policy responses should reflect this. With the Inverness and Highland City Region Deal and proposed growth deals elsewhere in the region being programmed over a minimum 10-year period, policies to address issues faced by young people should take a similar tack.

8.57 This will of course not be for HIE to deliver in isolation. Rather, a co-ordinated partnership approach, involving actors at local, regional and national levels, will be required to maximise the opportunities that exist for young people.

## APPENDICES

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## APPENDIX 1: METHOD

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### OVERVIEW

This chapter provides an in-depth overview of the methodology used to complete the primary research for the project. The primary research for this study consisted of two main phases: a programme of consultation with key stakeholders in issues concerning young people across the region, and a large-scale survey and focus group programme to gain the views of young people from across – and outwith – the Highlands and Islands.

### STUDY METHOD

#### Stakeholder consultation

The study team set up and conducted consultations with a wide variety of public and private sector agencies and organisations across the following categories:

- Strategic bodies;
- DYW groups;
- Education bodies;
- Local authorities;
- Business organisations; and
- Youth organisations.

The purpose of the consultations was to gain an understanding of consultees' views of the current issues surrounding out-migration of young people, as well as their views on policies in place and their effectiveness in addressing the challenges of out-migration. They provided comment on what they consider to be effective and priority solutions going forward to retaining and attracting young people to the Highlands and Islands, and perspectives they had on young people's aspirations. We sought any views consultees had on whether/how aspirations were being met, and how key strategic partners might address this.

A total of 19 stakeholders were consulted. A flavour of their views has been included thematically within the analysis chapters. This is not designed to be exhaustive or fully representative of the views of all stakeholders across the region, however they nonetheless give a sense of the priority afforded to policies that impact on young people, and the extent to which initiatives are addressing the needs identified in the survey evidence. A list of consulted organisations can be found at Appendix 3.

#### Young people survey

The programme of extensive primary research with young people between the ages of 15-30 is the main focus of this study. The study team took a mixed-methods approach to conducting this research: a large-scale online survey of young people, reinforced by focus groups to gather more qualitative views and opinions; and the use of social media to promote the survey.

The methods were used to identify the issues facing young people in the Highlands and Islands, their aspirations for the area and how opportunities could best be maximised in the region. It covered both those within and outwith the area, seeking to gain insights into the importance of these issues in relation to living, working and studying in the Highlands and Islands. A key objective of the survey was to allow some comparisons with the 2015 Attitudes and Aspirations research to identify changes in young people's views over the intervening period.

A total of 3,130 valid survey responses were obtained, however, not all respondents answered each question. Accordingly, throughout the analysis, each graph/table has an 'n' figure, representing the total number of responses received for that specific question.

Although the survey sample was slightly more highly represented in certain variables, notably amongst females (as detailed in Chapter 4 and Annex 2), the responses were not weighted to reflect the full range of responses received. Even without weighting, there is a strong confidence level and small margin of error against all variables for the population as a whole, and for both genders (please see Annex 2 for further information).

### ***Main study website***

The online survey was designed using SurveyMonkey ([www.surveymonkey.com](http://www.surveymonkey.com)), and was made available via a dedicated page on the HIE website at <http://www.hie.co.uk/young-people-research>.

### ***Social media engagement***

A social media campaign was undertaken to promote the survey and stimulate discussion on key themes pertinent to the study. Channels such as Facebook, Twitter and Instagram were used to generate interest in the survey. This was supplemented by the use of a prize draw including Belladrum Tartan Heart festival tickets, Groove Loch Ness festival tickets and Spotify and Netflix subscriptions as an incentive for participants to stimulate further interest and increase response rates.

### ***School engagement***

Schools across the Highlands and Islands were engaged to secure their participation in surveying school pupils. Pupils from six schools completed the survey within class time whilst several other schools informed pupils about the survey and asked them to complete it in their own time.

### ***FE/HE engagement***

FE and HE institutions across Scotland were engaged to help circulate details of the survey and the weblink to the study page, as part of an effort to gain responses from a key group for the study – students. Institutions across the UHI network engaged with the study, with 10 out of 13 colleges advertising the survey to students via email and intranet.

### ***Employer engagement***

Similarly, key employers across the Highlands and Islands were also engaged to help circulate details of the survey and the weblink to their young employees, as part of an effort to gain responses from another key group for the study – those young people within the region currently in employment.

### ***Focus groups***

Further insights into some of the themes identified were obtained from an online discussion portal. Participants were selected from self-recruited survey respondents. These online discussions were delivered using the online focus group platform, Liveminds ([www.liveminds.co.uk](http://www.liveminds.co.uk)). In total two focus groups were ran with 30 participants invited to each. The focus groups ran over seven days with a new question published each day. The questions covered the following themes: staying and leaving, the ideal employer, employment opportunities at the right skill level, availability of subject choice in education, housing, leisure opportunities and making compromises to live in the Highlands and Islands.



## APPENDIX 2: SURVEY RESPONSE PROFILE

### INTRODUCTION

This Appendix provides an overview of the profile of survey respondents. It gives a breakdown of the respondents by age, gender, geography, current status, qualifications, their plans for staying/leaving the Highlands and Islands, living arrangements, access to transport, Gaelic language ability, sexual orientation, disability/limiting condition/illness, religion and ethnic group.

### AGE

As shown at Table A2.1, 916 respondents (29%) were aged 15-18, 1,151 (37%) were aged 19-24 and 1,063 (34%) were aged 25-30. This offers a good level of representativeness – the proportion of respondents aged 19 to 24 was equal to that of the Highlands and Islands 15-30 population, whilst 15-18 were slightly over-represented, by three percentage points, and 25-30 year olds were conversely slightly under-represented, also by three percentage points. In comparison with the 2015 survey the sample is older and significantly more representative across the three age groups as in the previous survey 15-18 year olds made up over half (51%) of respondents.

**Table A2.1: Survey respondents by age**

Age group	2018 survey	%	Highlands and Islands (%)	+/-	2015 survey (%)	+/-
15-18	916	29%	26%	+3%	51%	-22%
19-24	1,151	37%	37%	-	27%	+10%
25-30	1,063	34%	37%	-3%	21%	+13%
<b>Total</b>	<b>3,130</b>	<b>100%</b>	<b>100%</b>	<b>-</b>	<b>100%</b>	<b>-</b>

*Source: ekosgen survey of young people, 2018*

### GENDER

Females were over-represented within the survey participants, accounting for 69% of all participants compared to 47% across the population aged 15-30 in the Highlands and Islands. Males accounted for 30% of survey respondents, compared to 53% across the Highlands and Islands 15-30 population. This is very similar to the previous survey where females comprised two thirds of the survey sample and males one third.

### GEOGRAPHY

Table A2.2 shows the breakdown of respondents by HIE area office. In total 2,909 (95%) of respondents were from the Highlands and Islands. The Inner Moray Firth accounted for largest number of participants from the Highlands and Islands at just under 1,200 or 41%, meaning that the area was over represented by six percentage points. Moray was the next most common area for participants to live, accounting for 12%. However, this was significantly lower than the proportion of 15-30 year olds across the Highlands and Islands living in Moray (22%). Argyll and the Islands was also under-represented within the survey respondents, accounting for 8% compared to 13% across the Highlands and Islands. Areas that were over-represented within the survey participants included the Outer Hebrides, which accounted for 8% of respondents compared to 5% of the total population of 15-30 year olds living in the Highlands and Islands. Respondents were asked to choose the area in which they live – the location of their current family home rather than a temporary residence used for study or short-term contracts.

In comparison with the 2015 survey, there was a significantly higher proportion of respondents from the Inner Moray Firth and Outer Hebrides, for these areas the proportion of survey respondents increased

by six and three percentage points respectively. On the other hand, the proportion of respondents from Argyll and the Islands decreased by five percentage points.

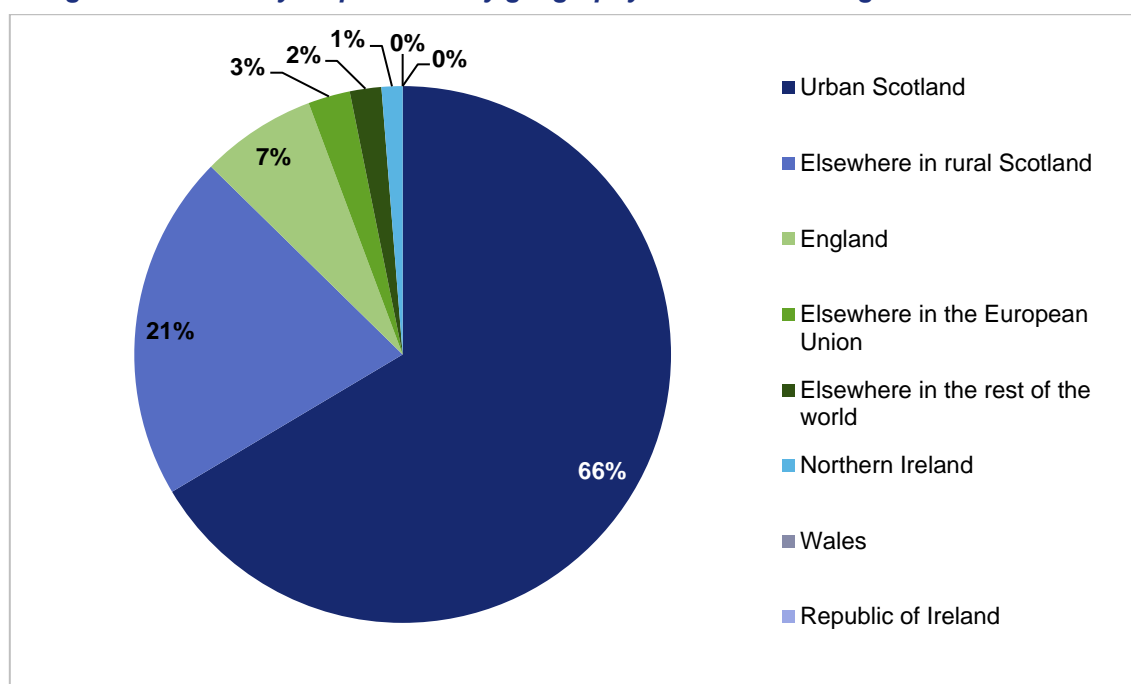
**Table A2.2: Survey respondents by HIE Area office**

HIE Area	2018 survey	%	Highlands and Islands (%)	+/-	2015 survey (%)	+/-
Inner Moray Firth	1,193	41%	35%	+6%	35%	+6%
Moray	341	12%	22%	-10%	15%	-3%
Caithness and Sutherland	272	9%	8%	+1%	8%	+1%
Lochaber, Skye and Wester Ross	268	9%	7%	+2%	7%	+2%
Argyll and the Islands	239	8%	13%	-5%	13%	-5%
Outer Hebrides	233	8%	5%	+3%	5%	+3%
Shetland	167	6%	5%	-1%	5%	+1%
Orkney	121	4%	5%	-1%	5%	-1%
<b>Total</b>	<b>2,909</b>	<b>100%</b>	<b>100%</b>	<b>N/A</b>	<b>100%</b>	<b>-</b>

Source: ekosgen survey of young people, 2018

As shown at Figure A2.1, of those who lived outside the Highlands and Islands (158 respondents), two thirds lived in Urban Scotland, with a further 21% living in rural Scotland. Of the 13% that did not live in Scotland the majority (7%) lived in England.

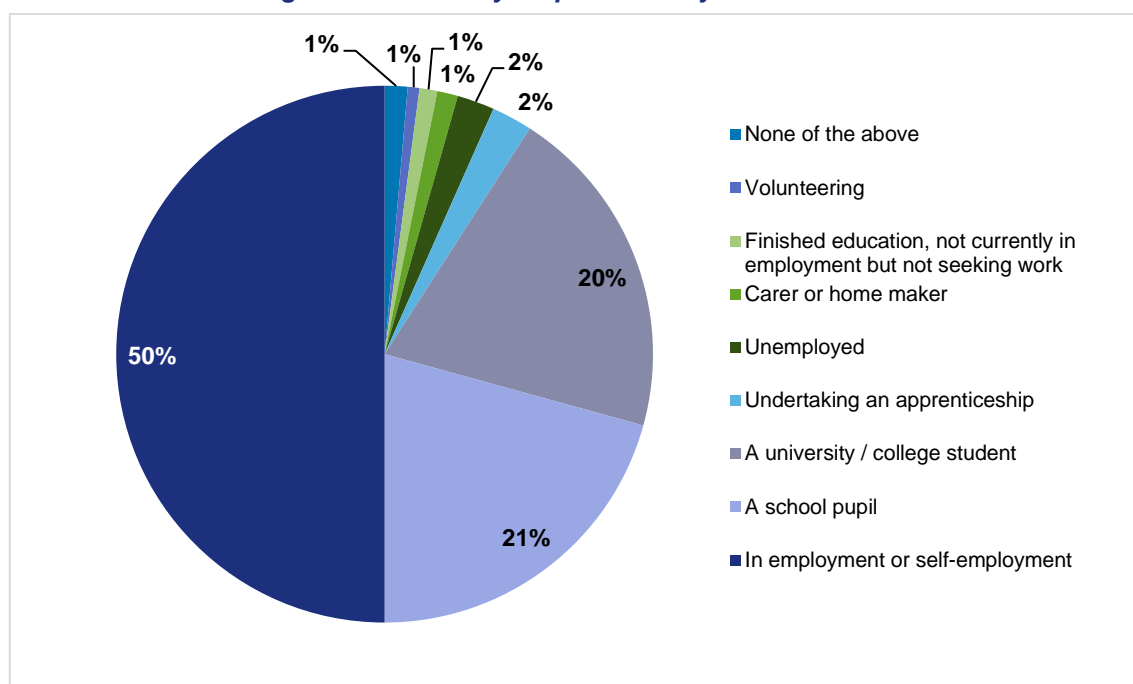
**Figure A2.1: Survey respondents by geography outside of the Highlands and Islands**



Source: ekosgen survey of young people, 2018 (n=158)

## STATUS

Figure A2.2 shows the breakdown of survey respondents by their current status. It shows that half (50%) of respondents were in employment or self-employment. The next most common status was school pupil, which accounted for 21% of participants, followed by university/college student, which accounted for 20%.

**Figure A2.2: Survey respondents by current status**

Source: ekosgen survey of young people, 2018 (n=2,978)

## SEGMENTATION

As shown at Table A2.3, nearly half (46%) of survey participants identified themselves as “committed stayers” who live in the Highlands and Islands and plan to remain there. Committed leavers, who are planning to leave the region, were the next largest group, but were far smaller, comprising 22% of the total cohort. Reluctant leavers far outnumbered reluctant stayers, accounting for 12% of participants compared to 4% for reluctant stayers. In comparison with the 2015 survey, the percentage of committed stayers has increased significantly, by 10 percentage points, whilst the proportion of committed leavers has significantly decreased – by twelve percentage points.

**Table A2.3: Survey respondents by self-identification**

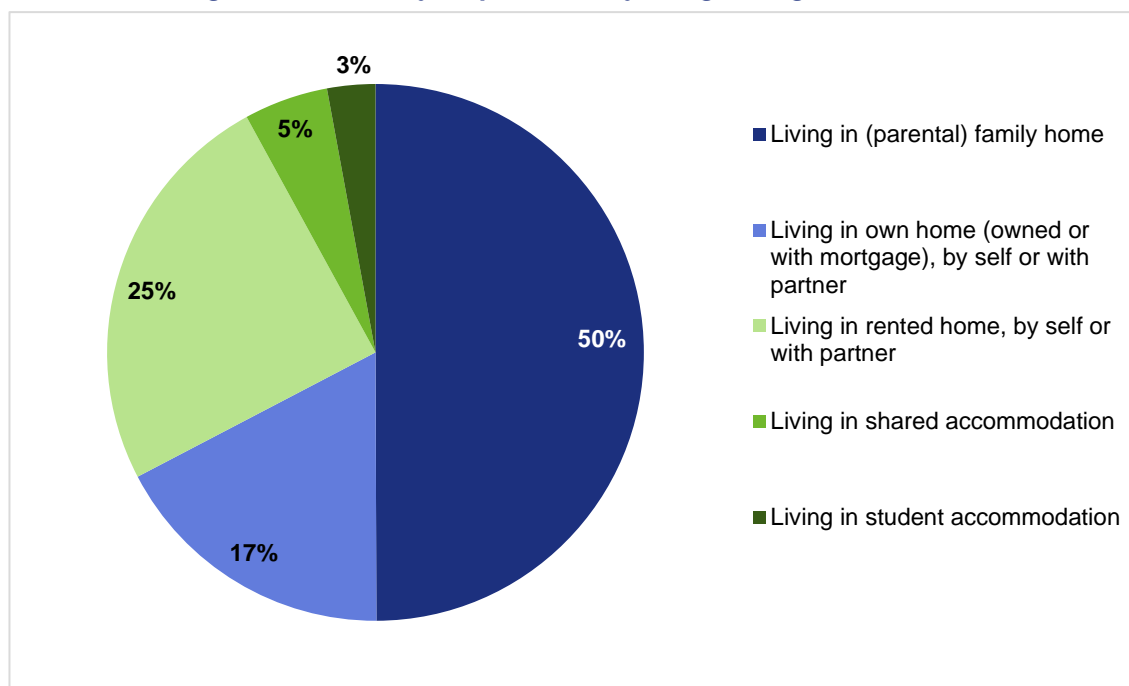
Which of the following best describes you?	2018 survey	2015 survey	+/-
<b>Committed stayer:</b> I live in the Highlands and Islands and I plan on living and working here	46%	36%	+10%
<b>Reluctant stayer:</b> I live in the Highlands and Islands; I would prefer to leave but I don't think I will be able to	4%	5%	-1%
<b>Reluctant leaver:</b> I live in the Highlands and Islands; I would prefer to stay but I don't think I will be able to live and work here	12%	11%	+1%
<b>Committed leaver:</b> I live in the Highlands and Islands, but I plan to leave, and live and work elsewhere	22%	34%	-12%
<b>Potential returner:</b> I live outside the Highlands and Islands, but I would like to return having lived there previously	7%	6%	+1%
<b>Potential new resident:</b> I live outside the Highlands and Islands, and I am interested in living there though I have not done so previously	2%	4%	-2%
None of the above	6%	4%	+2%

Source: ekosgen survey of young people, 2018 (n=2,539)

## LIVING ARRANGEMENTS

Figure A2.3 shows the breakdown of participants by their living arrangements. Half of survey respondents were living in a parental (family) home. This was followed by one quarter living on their own or with a partner in a rented home and 17% living on their own or with a partner in an owned home. Very few were living in shared (5%) or student (3%) accommodation.

**Figure A2.3: Survey respondents by living arrangements**



Source: ekosgen survey of young people, 2018 (n=1,794)

## ACCESS TO TRANSPORT

Over two thirds of participants (69%) had access to their own transport. Just under one third (31%) did not.

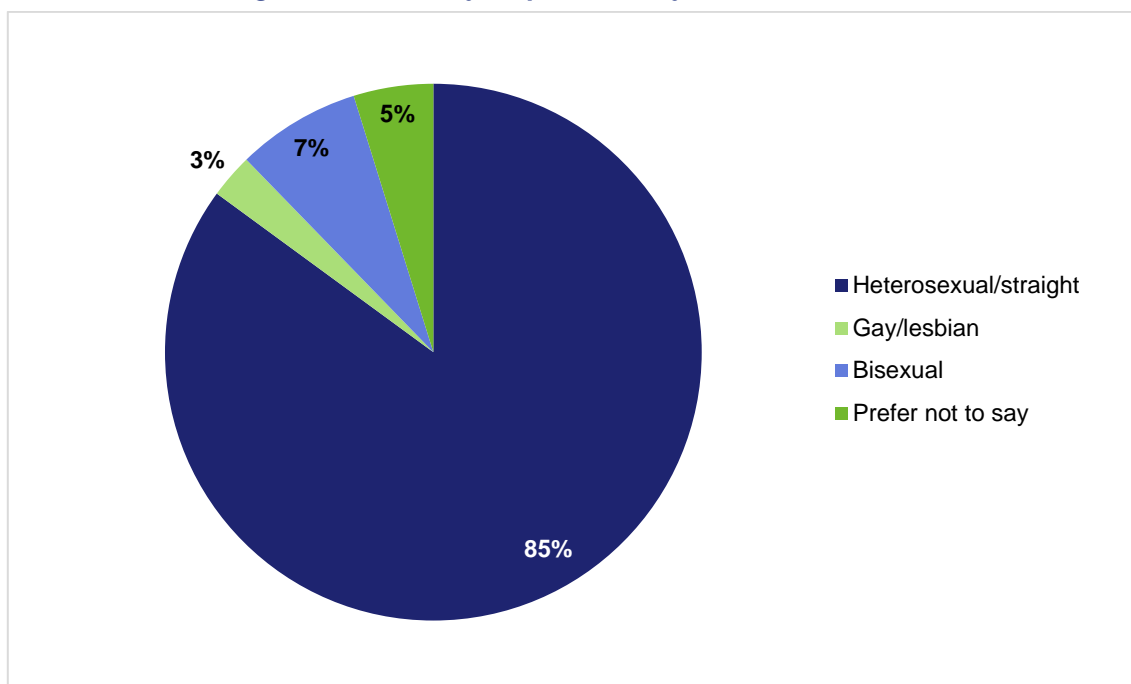
## GAELIC

The majority (68%) of participants did not have any Gaelic language skills. Just under one fifth (18%) had a little Gaelic, 6% said they had some Gaelic and 7% were fluent in Gaelic.

## SEXUAL ORIENTATION

As shown at Figure A2.4, 85% of survey respondents identified as heterosexual/straight, 7% as bisexual, 3% as gay/lesbian and 5% preferred not to say.

**Figure A2.4: Survey respondents by sexual orientation**



Source: ekosgen survey of young people, 2018 (n=1,834)

## DISABILITY/LIMITING CONDITION/ILLNESS

In total 16% of survey respondents had a physical or mental health condition/illness that was expected to last 12 months or more. Of those who did have a condition/illness, 56% stated that it limited their ability to carry out day to day activities a little, whilst for 14% it limited their ability to carry out day-to-day activities a lot. For 27% there was no impact on their ability to carry out day to day activities and 3% preferred not to say.

## RELIGION

As shown at Table A2.4, the majority (69%) of participants had no religious belief. Of those who did have a religious belief, Church of Scotland was the most common, accounting for 12% of all participants. This was followed by other Christian (7%) and Catholicism (6%). There were also small numbers of participants who were Muslims, Buddhists, Hindus, Jews and Sikhs.

**Table A2.4: Survey respondents by religious belief**

Religion	Participants	%
None	1,267	69%
Church of Scotland	217	12%
Other Christian	125	7%
Roman Catholic	101	6%
Prefer not to say	53	3%
Another religion (please specify) <sup>48</sup>	42	2%
Pagan	20	1%
<b>Total</b>	<b>1,825</b>	<b>100%</b>

Source: ekosgen survey of young people, 2018

## ETHNIC GROUP

Table A2.5 shows the breakdown of respondents by ethnic group. The clear majority (82%) of respondents identified as white Scottish. This was followed by white other British (11%). The remaining participants were split across several ethnic groups.

**Table A2.4: Survey respondents by ethnic group**

Ethnicity	Participants	%
White Scottish	1,496	82%
White other British	203	11%
Other White ethnic group	36	2%
Other (please specify) <sup>49</sup>	63	1%
Prefer not to say	18	1%
<b>Total</b>	<b>1,818</b>	<b>100%</b>

Source: ekosgen survey of young people, 2018

<sup>48</sup> Other religions include Buddhist, Muslim, Hindu, Sikh and Jewish.

<sup>49</sup> Other ethnic groups include Mixed or multiple ethnic group; White Irish; White Polish; African, African Scottish or African British; Pakistani, Pakistani Scottish or Pakistani British; Black, Black Scottish or Black British; Arab, Arab Scottish or Arab British.

## APPENDIX 3: CONSULTEES

Organisations
Argyll and Bute Council
Bòrd na Gàidhlig
Comhairle nan Eilean Siar
Developing the Young Workforce (DYW) North Highland
Developing the Young Workforce (DYW) Shetland
Federation of Small Businesses
Glasgow School of Art
Highland Council
Highlands and Islands Enterprise
Inverness College
Moray Council
North Ayrshire council
Scottish Council for Development and Industry
Scottish Funding Council
Shetland Islands Council
Skills Development Scotland
University of the Highlands and Islands
Young Scot



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