

OUR NEXT GENERATION

**Young people and the Highlands and Islands:
Attitudes and aspirations research**
Executive summary - June 2015





ATTITUDES AND ASPIRATIONS

INTRODUCTION

This report presents the findings of a wide-ranging study to explore the attitudes and aspirations of young people in relation to the Highlands and Islands of Scotland.

A total of 4,409 young people contributed to the research, sharing their views on the Highlands and Islands as a place to live, work and study.

The review builds on a previous study undertaken in 2009 to understand the attitudes and migration choices of young people to and from the Highlands and Islands. This study identified key segments which formed the analytic core of the 2015 research: *committed stayers*; *reluctant leavers*; *reluctant stayers*; *committed leavers*; *potential returners* and *potential new residents*.*

APPROACH

The research study involved a large scale survey of young people aged 15-30 from both within and outwith the Highlands and Islands. The approach made extensive use of social media to foster interest and engagement in the research, with schools across the region also participating. An online discussion portal provided further insights into some of the themes identified in the survey, and stakeholders from a wide variety of public and private sector agencies and organisations were consulted.

CONTEXT

The Highlands and Islands has a “deficit” of young people (aged 15-30) when compared with Scotland as a whole (16% compared with 20%). This is largely caused by net out-migration - of those aged 17-20 years, although there is evidence that this is decreasing. Factors impacting upon the migration choices of young people include education, training and employment opportunities, housing availability, transport provision and digital and mobile connectivity. Strong community factors also affect decision-making, including affinity with and ties to local areas.

The study revealed an extensive range of policies and strategic interventions that have, and are being implemented to help address the challenges of out-migration. Some are explicit in their focus on young people, while others are more indirect in nature or may focus on specific issues such as employability or youth unemployment.

Policy response includes:

- **The Highlands and Islands Skills Investment Plan**, developed by Skills Development Scotland, recognises the need to retain young people and attract new ones into the region as part of planning for the future and addressing skills gaps and shortages across the region.
- **Inverness Campus**, a flagship development to create an internationally significant location for business, research and education in the Highlands and Islands which opened in May 2015. It provides an innovative co-location centre to stimulate innovation and business growth, as well as being a centre for education and learning.
- **Broadband investment** through Digital Highlands and Islands has the potential to transform access to economic and educational opportunity for all, including young people.
- **Transport subsidy policies** such as the Road Equivalent Tariff and the Air Discount Scheme are targeted at aiding more peripheral parts of the Highlands and Islands in making travel more affordable.
- Other initiatives, such as the **ScotGrad graduate placement scheme** provide opportunities for predominately young people to gain experience, using their graduate skills in an innovative, growing business.

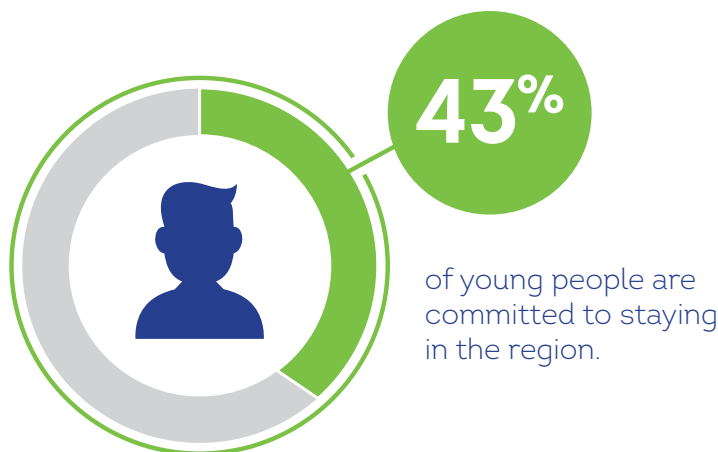
The development of UHI and initiatives associated with aligning skills needs with employment opportunities are seen as being particularly effective in addressing out-migration. Sustained investment and policy intervention will be required if the region is to address the long-term challenges associated with outmigration. There is a need to explicitly address the needs of the region's young people through co-ordinated and multi-agency action, and to do so over a long period of time.

* This research was carried out between January and April 2015.

KEY FINDINGS

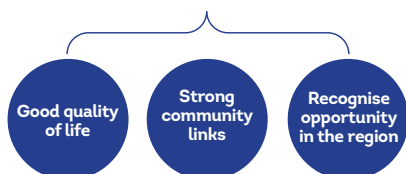
PERCEPTIONS OF STAYERS AND LEAVERS

- **Young people typically fell into two key segments, committed stayers, or committed leavers;** some 43% of those currently living in the Highlands and Islands are committed stayers. This rises to 53% for Orkney, 51% for Shetland and 48% for Caithness and Sutherland.
- **Commitment to leaving reduces with age:** though 40% identify themselves as committed leavers, this is far higher amongst those of school age who are more likely to say they wish to leave the region.



6 out of 10

respondents recognise that young people want to stay in the region for positive reasons.



Almost half

of respondents who have never lived in the region are interested in doing so, and three in four of these are aged under 25.

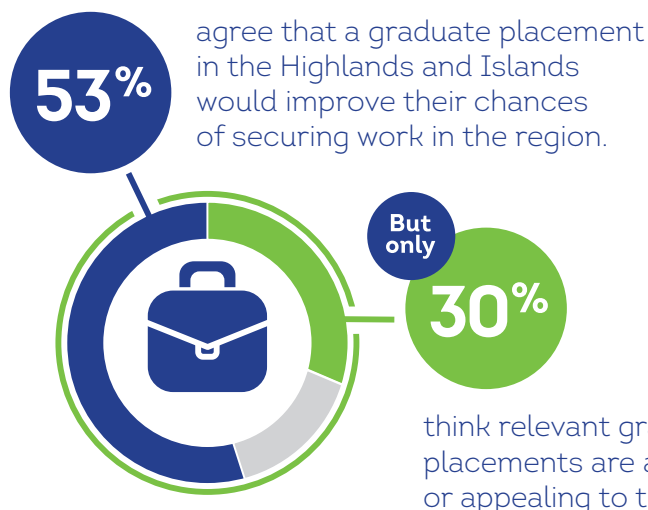
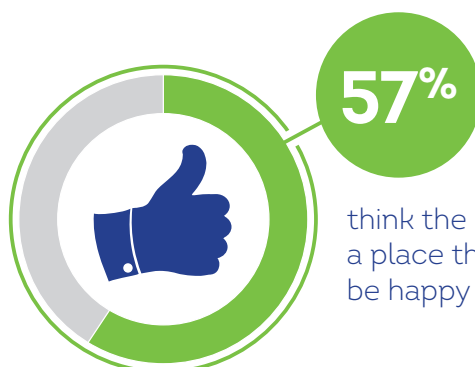
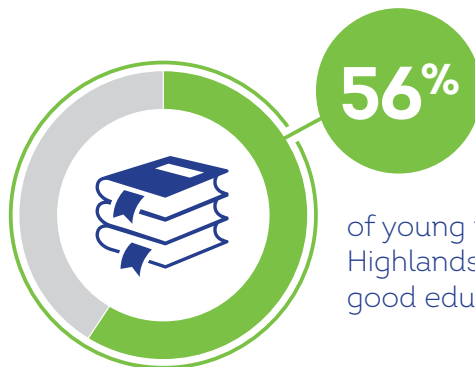
- **There is a strong pool of potential returners, and potential new residents:** Almost half of those young people who have never lived in the region are interested in doing so, and three in four of these are aged under 25. Potential returners are most typically in employment and post-study.
- **There is now a more positive view of those who stay:** The proportion thinking that those staying are doing so for negative reasons, such as a lack of ambition, has fallen. Views on those who stay are now dominated by positive connotations: six in 10 say stayers do so because they value the quality of life and are considered lucky to be able to do so.
- **School leaver decisions are strongly influenced by exam results and the availability of courses that are of interest to them:** The range of subjects available at school is the third greatest influence, although response suggests this can be seen as a limiting factor.

LEARNING IN THE HIGHLANDS AND ISLANDS

- **There is a general perception that the Highlands and Islands has a good educational offering:** 56% per cent of respondents think so, although more than one in five think more can be done to increase the breadth of provision for both Further Education and Higher Education courses.
- **More than half think there is a good range of Further Education/College courses:** although in some parts of the region, almost a third disagree. Overall, more young people say that courses are available that are of interest to them than do not.
- **UHI continues to develop and be viewed positively by young people, although they feel it still needs to build credibility and prestige:** around six in ten (57%) see it as a place they would be happy to attend; almost half of respondents think it is a good place to be an undergraduate, although more think it is still better suited to mature students. Fewer (35%) agree it is comparable to other HE institutions, or rate it highly for research and teaching specialisms (36%). There is also weak visibility in parts of the region, particularly in Argyll and the Islands, and amongst school pupils generally.
- **Inverness Campus offers considerable potential for the region:** young people believe the Inverness Campus development will strengthen UHI's educational offer and its links with industry. However, awareness of the development diminishes with distance from Inverness. The potential for Inverness Campus to facilitate the development of relationships between academia, business and research is recognised and favourably viewed.

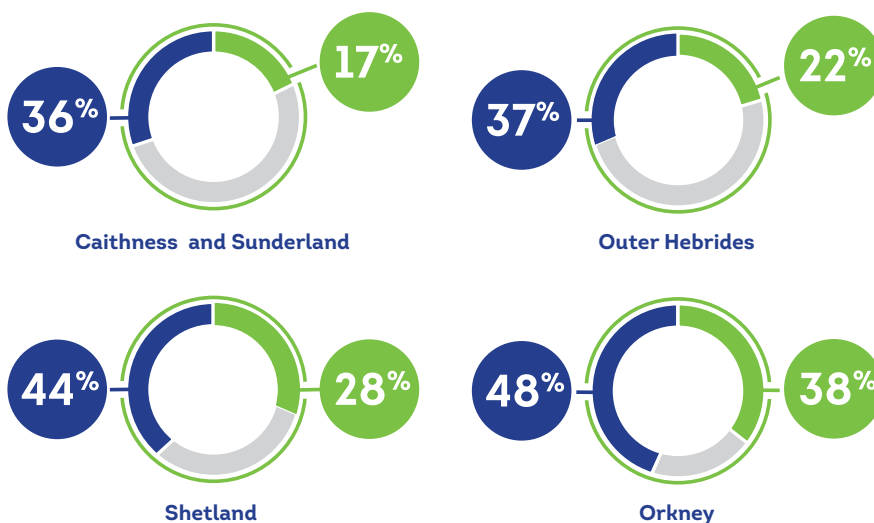
- **The Highlands and Islands offers affordable local study opportunities:** almost six in 10 feel they are able to stay and study locally and there are increasing opportunities to learn remotely. There are, however, considerable geographical differences – those from Argyll and the Islands (48%) are least likely to say they are able to stay and study in their local area.

- **More needs to be done to improve graduate placement availability and visibility:** despite the success of those who undertake graduate placements (including placements through ScotGrad), there is a perception of a lack of availability – only 30% agree that adequate/interesting placements are available or appealing in the region. Furthermore, 80% of young people are not aware of ScotGrad.



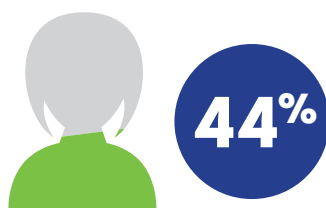


This difference increases in more peripheral areas:



WORKING IN THE HIGHLANDS AND ISLANDS

- **Diverse local employment opportunities are not widely regarded as available:** although 39% feel there are diverse employment opportunities across the region as a whole, this falls to just 29% in considering their local area. The lack of diverse local employment opportunities is particularly acute in Argyll and the Islands, the Outer Hebrides, Lochaber, Skye and Wester Ross and Caithness and Sutherland.
- **Similarly, there are limited opportunities for local career progression:** less than three in 10 believe there are good local opportunities for career progression, yet this emerges as one of the key issues (second after availability of high quality jobs) in making the region an attractive place for young people to work, live and study.



of young people want to stay and work in the region.

- **A sizeable proportion want to work in the Highlands and Islands:** in all 44% want to work in the region, three in 10 wish to do so in their local area, and this proportion increases with age. The proportion wanting to work locally is highest in Orkney (48%), Shetland (44%), the Outer Hebrides (37%) and Caithness and Sutherland (36%) – the same communities where there is the greatest discrepancy between availability of diverse employment opportunities and desire to work locally.
- **Self-employment opportunities are generally regarded as good:** 39% consider there to be good self-employment opportunities in their local area, highest in Orkney and Shetland, and around a quarter see themselves as being self employed by the time they are aged 35.
- **The availability of apprenticeships is viewed positively:** in all, 49% think there are good local opportunities for apprenticeships, rising to 53% at the regional level. This is a positive endorsement of the explicit objective to increase the number of Modern Apprenticeships. Perceived availability is still lowest in Caithness and Sutherland, Lochaber, Skye and Wester Ross and the Outer Hebrides.

- **Young people in the Highlands and Islands are not thinking internationally:** very low proportions of young people place value on a global outlook or international trade among employers. This suggests lack of awareness of the benefits to businesses and economies of global mindset and international trade.



think living in the Highlands and Islands means compromising on career opportunities.

LIVING IN THE HIGHLANDS AND ISLANDS

— **Access to housing is a big barrier for young people:** almost half of all young people live in the parental home (up till age 30); almost twice the proportion nationally for those aged 20-35 years. Access to housing to buy, or even rent, is regarded as limited, with this being particularly acute in the Outer Hebrides and Shetland. Whilst market conditions and access to credit/mortgages challenges are not unique to the Highlands and Islands, the lack of available and affordable housing is a particular barrier.

— **There is increasing recognition of the potential of self-build opportunities:** young people value these options, and support mechanisms such as Help to Buy; yet they are not sufficient to address the scale of demand from young people seeking access to housing.

— **There remain issues associated with transport availability and costs:** there is a mixed picture in terms of mode of travel and by geography. Availability and affordability of bus and ferry services are rated more highly than train and air services. However, the introduction of RET on ferry routes does appear to be impacting positively on attitudes towards cost.



of young people **believe good access to housing is critical** for attracting them to live, work and study in the region.

— **Public transport timetabling is a frustration:** timetabling and travel logistics are considered poor – many young people find it easier to travel to other parts of Scotland than to elsewhere in the Highlands and Islands, and the lack of joined-up service timetabling is cited by many. Although six in 10 have their own transport, there is a poor perception of the adequacy of public transport.



of respondents are still living in parental home up to the age of 30 because of limited housing options.

— **Mobile connectivity is not highly rated:** the lack of mobile 3G/4G is a significant issue, and for young people this is more of a concern than NGA broadband. Views are divided over the reliability of connectivity (35% rate as good and 37% as poor). However, less than a third rate mobile coverage as good (37%), and only a fifth rate access to 3G/4G favourably. The dominant rating for each of these is poor.



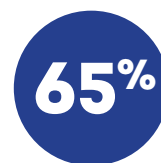
51% think that **mobile connectivity** is very important in making the Highlands and Islands an attractive place for young people.

However...



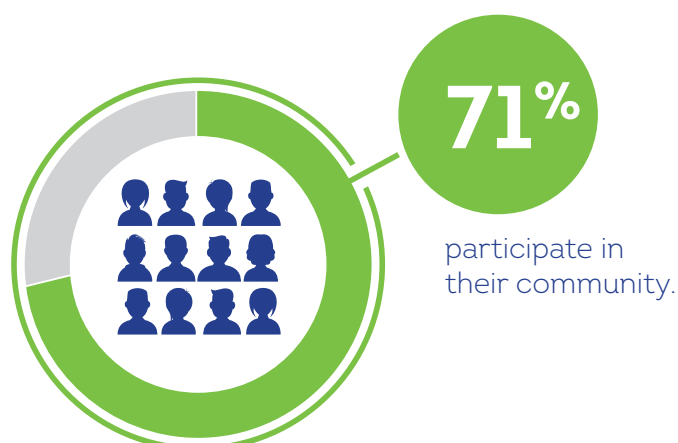
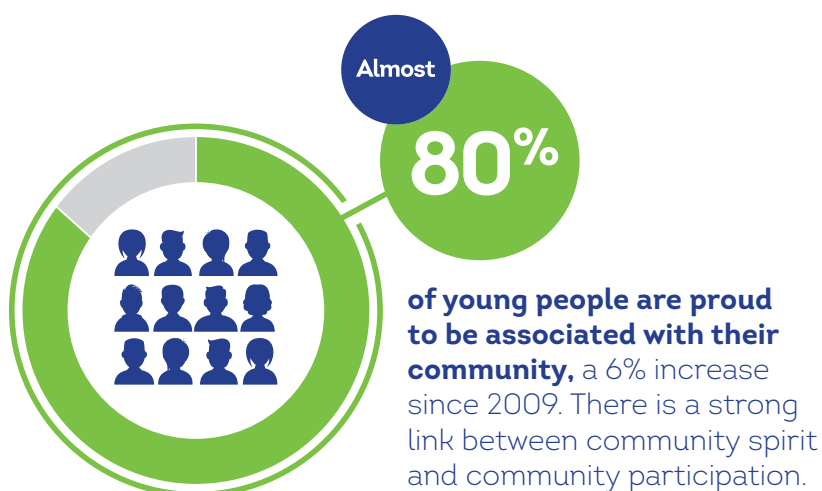
think reliability is poor.

think coverage is poor.



think access is poor.

- **Young people recognise the potential benefits of Next Generation Access for education and flexible working:** although young people see the greatest benefits of NGA as being for entertainment and social interaction, there is wide appreciation of the potential benefits of NGA in improving access to education and in allowing more flexible working.
- **Young people are proud of where they live – and pride is increasing:** today some 78% of young people are proud to be associated with their town or local community, up from 72% in 2009. In some areas, this pride is almost universal in young people (93% in Orkney, 92% in Shetland and 85% in the Outer Hebrides).
- **There are good levels of community participation, and this is closely related to levels of community spirit:** there are good levels of community engagement and participation in parts of the Highlands and Islands such as the Outer Hebrides, Orkney and Shetland, and less so in others, such as Moray and the Inner Moray Firth. In the case of the latter, these are also the areas where young people report a weaker community spirit or attachment.
- **Despite modest improvements in perceived tolerance to differences, this remains an issue for young people in many communities:** although improving by one percentage point since 2009, 49% still do not agree their local area is a place where it is “OK to be different” This is a particular issue in Caithness and Sutherland and the Outer Hebrides.
- **There is a gap between importance and perceived provision of social, cultural and leisure offerings:** three-quarters of young people deem it important to have access to a wide range of leisure and cultural outlets – particularly social venues, sports facilities and outdoor attractions. Conversely, the availability of these has mixed ratings – whilst gym / leisure centre provision is generally considered good, social clubs and venues are not. Nevertheless, many consider the regions’ offer, particularly the outdoors, to compare favourably to elsewhere in Scotland.
- **Demand for arts, leisure and culture varies by location:** there are a number of examples of this, most notably with respect to the Gaelic offer. Having a supportive environment for Gaelic was cited as important to almost half (47%), and very important by around a fifth of all young people, rising to just over a third of young people in the Outer Hebrides where Gaelic culture is particularly strong.



FUTURE ASPIRATIONS: IMPLICATIONS

- Young people have a clear view on the factors they think would make the Highlands and Islands a more attractive place to live, work and study: high quality jobs, opportunities for career progression, good access to housing, good access to Further Education/Higher Education and affordable transport links are the top five factors for young people with 61% to 68% ranking these as **very important** in making the Highlands and Islands attractive to live in.

- There are strong geographic variations in those wanting to stay or leave in the future: future aspirations are linked closely to the way in which young people describe themselves in terms of committed leavers or committed stayers, and closely related to life stage. Those in Shetland (56%) and Orkney (53%) are most likely to want to live in their local area in five years' time, and even more so wish to do so at 35 years old. In contrast, Lochaber, Skye and Wester Ross (25%) and Argyll and the Islands (32%) have the lowest proportions of young people wanting to stay in their local area in five years' time. Young people from Moray show the highest propensity to want to leave the local area and stay away. Orkney shows the strongest evidence of young people wishing to leave within the next five years, and return later in life.



over 1/2

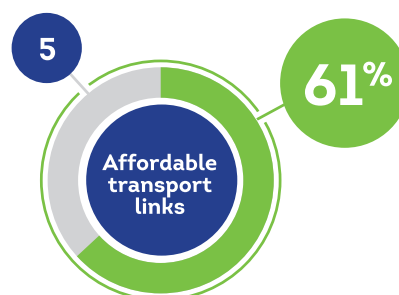
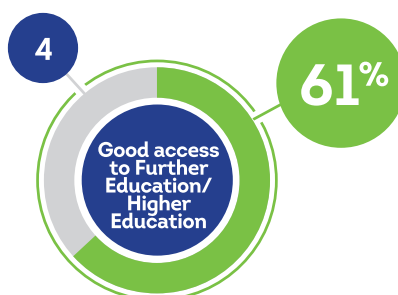
of young people think the Highlands and Islands region is a better place to live now than five years ago.

Half think it will be better still in the next 5 years.

- Young people think the Highlands and Islands is improving: around half (51%) of young people think the Highlands and Islands region is a better place to live now than it was five years ago. Only around one in seven (15%) feel the region has not improved. On the whole, young people are optimistic about the future of the Highlands and Islands where again only around one in seven (14%) do not anticipate improvement in the next five years.

- There is something of an 'Inverness effect': Those in the Inner Moray Firth (58%) and Moray (52%) are the most likely to believe the region is a better place to live now than five years ago. The highest levels of optimism for the future are in the Inner Moray Firth (53%).

Top 5 factors that would make the region a more attractive place to live, work and study:





ATTITUDES AND ASPIRATIONS

POLICY RECOMMENDATIONS

Education, employment and career progression opportunities are central to retaining and attracting young people to the region. There is a need for stakeholders to take appropriate action in co-ordinated and strategic response at both regional and community planning levels.

This includes the targeting of potential returners and potential new residents, and the need to focus on the needs of reluctant leavers. Tailored interventions in the areas where there are the greatest number of reluctant leavers will help meet their needs and improve retention.

With these points in mind, the review gives rise to a number of policy recommendations.

POLICY RECOMMENDATIONS EDUCATION



1

To widen the school subject offering, particularly for rural schools, and raise the profile of UHI and Colleges with school pupils.

2

The need to further develop the Further Education offer, its availability and take-up, and to promote greater links to Higher Education.

3

To broaden the UHI offer across the region, especially Higher Education and postgraduate opportunities. Part of this involves attracting high calibre lecturers and researchers, and extending its collaborative work with businesses. It also involves greater promotion of areas of excellence.

4

The need to capitalise on the benefits of Next Generation Access broadband to further expand remote learning opportunities for Further Education/Higher Education. In some parts of the region, a very high proportion of school leavers wish to attend University and not all wish to go away to do so.

5

Ensuring that the impact of the Inverness Campus is not limited to Inverness / Inner Moray Firth, and that efforts are made to extend its influence more widely outwards to the rest of Highlands and Islands.

6

To greatly increase the number of graduate placements opportunities. ScotGrad is effective but operates on too small a scale to meet the demand for placements/work experience from young graduates. New programmes need to be developed to support this latent skilled workforce.

POLICY
RECOMMENDATIONS
EMPLOYMENT



1

A significant and sustained focus on creating more employment opportunities for young people at all levels, increasing choice and prospects for progression and reducing the effects of this “push” factor so that those who wish to stay or return can do so.

2

A concentrated focus on developing career progression opportunities, from up-skilling young employees, to increasing the number of progression opportunities to helping businesses with succession planning.

3

Supporting more young people to take up self-employment as a viable alternative to paid employment and increasing entrepreneurship in the Highlands and Islands.

4

Further promotion and targeting of apprenticeships in areas where opportunities are perceived to be poorest, to increase the number of apprenticeships and/or awareness of their availability.

5

Communication of opportunities in growth sectors, including countering negative perceptions in important sectors including Sustainable tourism and Food and drink.

6

A need to raise awareness among young people of the benefits of global thinking and international trade in business, highlighting correlations with innovation, improved productivity and competitiveness and higher wages.

POLICY
RECOMMENDATIONS
HOUSING,
TRANSPORT
AND DIGITAL
CONNECTIVITY



1

Increasing the supply of affordable housing to buy, and to rent. Help to Buy, and variants of schemes which promote shared equity, should be actively promoted and efforts made to encourage community land owners to release serviced sites for self-build and other affordable housing related initiatives.

2

The introduction of further cost reduction measures and improved or joined-up timetabling across all modes of transport to overcome barriers and to make the Highlands and Islands a more affordable place for young people to live.

3

Increasing awareness of the potential benefits of NGA. Whilst there is some recognition of the potential of NGA to support remote learning and flexible working, these opportunities need to be realised.

4

Mobile coverage is now the bigger connectivity issue to address, and measures being explored/ put in place to extend/ improve coverage should be expedited.

POLICY
RECOMMENDATIONS
SOCIAL
AND COMMUNITY



1

The importance of social factors to young people should not be overlooked. Social and live music venues are rated as poor but important. Though difficult to address through permanent venues; events and festivals are very popular and could be developed further.

2

The food and drink offer is rated highly and its value should be emphasised and developed as a means of facilitating social interaction. The outdoor offer is valued by young people as a distinctive regional characteristic and this can be used to further attract returners and new residents.

3

Ensuring it is 'OK to be different' in all parts of the region.

4

Supporting community participation by young people, to foster a higher level of community spirit and engagement where this is currently weaker.



ATTITUDES AND ASPIRATIONS

CONCLUSION

The study revealed some extremely positive findings but also some very clear messages from young people about what needs to be addressed to make the Highlands and Islands an attractive place to live, work and study. There are high levels of pride amongst young people towards their communities and strong attachment is also evident.

Many want to live and work in their local area, and would do so in greater numbers if more opportunities were created. Sustained efforts by public sector partners to broaden education and employment opportunities for young people will lead to an increase in the population of 15-30 year olds across the region.

Although there is an extensive policy landscape with the potential to address out-migration, there is little overt policy that focuses directly on the needs of young people. This needs to be addressed; the range of issues affecting young people in the region are multiple, diverse and inter-related.

This demands shared ownership across the public and private sector and a mix of national, regional and localised interventions to address the associated challenges. Young people do not need to be convinced of the benefits of life in the region, but they need the opportunities to be available to them to enable them to stay or return or move here.

This study provides a robust evidence base upon which to develop and take forward appropriate policy response.

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