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OUR NEXT GENERATION

Young People in Caithness and Sutherland
Attitudes and aspirations.
Research report
September 2015

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Highlands and Islands Enterprise
Iomairt na Gàidhealtachd 's nan Eilean

TABLE OF CONTENTS

1 Introduction

1.1 This report presents the findings of a wide-ranging study to explore the attitudes and aspirations of young people aged 15-30 in relation to the Highlands and Islands (H&I) of Scotland, with a particular focus on young people in Caithness and Sutherland. Overall, a total of 4,409 young people from within and outwith the H&I participated in the research, sharing their views on the region as a place to live, work and study. This summary report analyses the views of 234 young people in Caithness and Sutherland who contributed to the research.

1.2 The report presents findings for Caithness and Sutherland as a whole, providing comparisons with the results for the wider H&I. Where possible, analysis is also provided for young people living in Caithness and those in Sutherland separately.[1] Where applicable within Caithness (mainly on employment-related issues), finer analysis is also provided on respondents from Wick and Thurso – the two main towns in Caithness, highlighting where their views differ from each other and the Caithness and Sutherland average.[2]

Approach

1.3 The approach made extensive use of social media, through which young people were invited to complete an online survey. Two high schools in Caithness and Sutherland participated in the study. An online discussion portal allowed young people to provide further insight on their views. The study also gathered perspectives from stakeholders from both within and outwith the H&I region, including representatives from public sector and other organisations.

Study context

1.4 The H&I have a deficit of young people, and there has traditionally been an outflow of young people from the region; this is also the case with Caithness and Sutherland.[3] There are a wide range of factors that impact on the choices and aspirations of young people, including educational and employment opportunities, the cost of living, transport, housing, cultural and connectivity issues. There are also strong local factors affecting decision-making, including close community ties for many young people in the region.

1.5 There are a range of policies and strategic interventions that have been, and are being, implemented, both locally within Caithness and Sutherland, across the H&I region and nationally. These have a varying level of explicit focus and degree of impact on young people in the region.

The Caithness and Sutherland context

Population and Impact of Geography

1.6 Census data from 2011 highlights the 'deficit' of young people that exists across the H&I. In 2011, there were 6,197 young people aged 15-29 recorded as living in Caithness and Sutherland, 16% of the total population, in line with the H&I (also 16%) but below the 20% for

[1] Please note that responses from young people in Sutherland are mainly from along the east coast (along the A9), with very few responses from the more remote, north west Sutherland.

[2] Note: an overview of survey respondents by geography, age, gender, and status, can be found in Appendix 1

[3] Highlands and Islands Enterprise (2014) *Young People in the Highlands and Islands: Socio-economic Profile.* May 2014, p.3

Scotland.[4] [5] Although data are not available at the Caithness and Sutherland level (it is only available at local authority level), the Highland Council area had a net out-migration of 194 young people aged 15-29 years (with a net out-migration of 585 for those aged 17-20 years)[6]. Further, whilst the proportion of young people aged 15-29 years in Caithness and Sutherland grew by 7% between 2001 and 2011, 2012-based population projections suggest that the number of young people is expected to decrease 13% by 2037.[7]

1.7 Caithness and Sutherland covers a large geographic area of approximately 7,650km²[8] and, with a total population of 39,252 according to 2013 mid-year estimates,[9] has a very low population density of approximately 5.1 inhabitants per km.² The largest population centres (from the 2011 Census) are Thurso (9,074) and Wick (8,219).

1.8 Compared to the rest of the H&I and Scotland, it is the primary industry sectors of agriculture, forestry and fishing and mining, quarrying and utilities that are more prominent, along with the construction sector, with a higher proportion of employment in the skilled trades rather than professional occupations. Unemployment levels tend to be above the H&I average and the proportion of adults with no formal qualifications is higher than both the H&I and Scottish averages.[10]

1.9 The Dounreay nuclear power plant is the largest employer in Caithness, and at the time of reporting this was still in the region of 1,000 in direct employment and the same again in sub-contractors[11]. Although the power plant stopped generating electricity in 1994, the decommissioning process is still ongoing, supporting a number of highly technical jobs locally.[12] Indeed, while it was estimated in 2006 that Dounreay supports one in every four jobs in Caithness, it was also estimated that, including both direct and indirect employment:

> *"as many as one in three jobs in Caithness and North Sutherland depend on the decommissioning activities at Dounreay. It is estimated that currently £80 million is injected each year into the local economy as a result of the decommissioning programme. Therefore the closure of Dounreay will result in major social and economic challenges for Caithness and North Sutherland."*[13]

1.10 A number of interventions have been implemented by Dounreay Site Restoration Limited (DSRL) and the Nuclear Decommissioning Authority (NDA) as a result, seeking to diversify the skills base of local employees for when the decommissioning process completes (see below).

1.11 Caithness and Sutherland covers the very north and east of Scotland and parts of the area are very remote. Trains service the east coast of the area, and there is also an airport at

[4] http://www.scotlandscensus.gov.uk/documents/censusresults/release1c/rel1ctableA1.pdf

[5] Census (2011) – area office breakdown provided by Highlands and Islands Enterprise.

[6] Please note, data on net out-migration between 2010 and 2012 for Caithness and Sutherland is not available due to data limitation issues; data for Highland Council is the best available.

[7] Highlands and Islands Enterprise (2014) *Young People in the Highlands and Islands: Socio-economic Profile.* May 2014, p.18

[8] http://www.caithness.org/geography/caithnesssuthstats.htm

[9] Mid-Year Population Estimates 2013 (NRS), provided by Highlands and Islands Enterprise.

[10] Highlands and Islands Enterprise (2014) *Caithness and Sutherland Area Profile.* May 2014, p.2

[11] DSRL: http://www.dounreay.com/jobs-and-spending

[12] http://www.hie.co.uk/regional-information/area-information/caithness-and-sutherland/overview.html

[13] Dounreay Site Restoration Limited (2009) *Socio-economic Strategy 2009-2010*, p. 1. Online at: http://www.dounreaystakeholdergroup.org/files/downloads/download1100.pdf

Wick. Nevertheless, a number of communities suffer from economic fragility, particularly in north and west Sutherland.[14] This remoteness gives rise to a number of infrastructure and connectivity issues that have a bearing on potential growth opportunities, at least to some extent.

Key policies and strategies

1.12 The key employment sectors in Caithness and Sutherland are the public services of: health and social care; education; public administration and defence; construction; agriculture and mining. Other significant employment sectors are private sector services including the primary industries, construction, wholesale and retail trade; motor repairs; and accommodation and food services.[15] This reflects a lower representation of sectors related to the knowledge economy. Employment in Caithness and Sutherland also covers a number of growth sectors supported by HIE's long-term strategy and current Operating Plan priorities, notably Sustainable tourism, Food and drink and Energy, which are seen as crucial to pursuing the regional goal of economic diversification, ownership and sustainability. The diversification of the economy and the need for sustainable economic growth are particularly important as the decommissioning of Dounreay continues.

1.13 In 2012, the Highland Economic Forum (under Highland Council) prepared an Action Plan for Economic Development designed to address local business growth needs, academic research funding, skills development, youth unemployment and job creation.[16] This followed the Council's Employability Development Plan (2010), aiming to *"ensure a coordinated approach to engaging with people who are disengaged from the labour market to enter, sustain and progress in work."*[17]

1.14 Further, a number of specific policies and strategies have been developed for Caithness and Sutherland, seeking to address the acute problems in the area. These include DSRL's *Socio-economic Strategy 2009-2010* and the NDA's *Socio-Economic Caithness and North Sutherland Priority Area Plan* (2009). DSRL's Socioeconomic Strategy aims to:

- Prepare and support transition of employees into alternative sustainable employment
- Use skills and infrastructure to create new growth opportunities, and
- Nuclear industry skills development through education, retraining and skills development.

1.15 To do this, DSRL aims to: *"support and influence national and local regeneration agencies; communicate with employees and Trade Unions to develop workforce transition plans; assist in the development of individual transition plans and transition training/ support programmes;* [and] *work with our supply chain to inform and support them in developing their own workforce transition plans."* As such, DSRL has developed a socio-economic plan which is updated equally to support these objectives.[18]

[14] http://www.hie.co.uk/regional-information/area-information/caithness-and-sutherland/overview.html

[15] Census 2011, cited in Highlands and Islands Enterprise (2014) *Caithness and Sutherland Area Profile.* May 2014, p.6

[16] Highland Council, Action Plan for Economic Development, page 1. http://www.highland.gov.uk/downloads/file/1023/action_plan_for_economic_development

[17] Highland Works: Employability Development Plan 2010, p. 2. http://www.highland.gov.uk/downloads/file/1008/highland_works

[18] Dounreay Site Restoration Limited (2009) *Socio-economic Strategy 2009-2010*, p. 4. Online at: http://www.dounreaystakeholdergroup.org/files/downloads/download1100.pdf

1.16 Further, Caithness and Sutherland is one of four priority areas in the NDA's Socio-economic Policy. Its vision is *"to support the creation of dynamic, sustainable local economies for communities living near our sites, in Partnership with regional development agencies and organisations."*[19] In order to minimise the impact, and maximise the opportunity, of decommissioning and clean up, the NDA seeks to enhance local employment opportunities, support the diversification of the economy, and *"increase the attractiveness of areas close to NDA sites as places to live, work and invest, with particular emphasis on achieving environmental, social, cultural and infrastructure improvements."* The thematic priorities are: employment, education/skills, economic and social infrastructure and economic diversification.[20]

1.17 Caithness and Sutherland is also covered by the Highland Community Planning Partnership's Single Outcome Agreement (SOA)[21]. One of the key SOA outcomes of particular relevance to young people is to provide a *"coherent and individualised approach to post school transition for young people experiencing significant barriers to employment."*[22]

1.18 At a regional level, the Highlands and Islands Regional Skills Investment Plan[23] (RSIP), developed by Skills Development Scotland (SDS), identifies skills challenges. It cites the greatest challenge for the H&I as the retention and attraction of working age people. Out-migration is also identified as a major skills challenge, with net out-migration evident for all ages from 15-39. The plan identifies growth opportunities for the region, including Energy and the Creative industries.

Key Investments

1.19 HIE, Highland Council, and other partners are responding to the opportunities and challenges in Caithness and Sutherland through key investments. Many of these are related to the decommissioning of Dounreay, mentioned previously, and are typified by initiatives to diversify the skills base and key sectors of the local economy. For example, Making the Right Connections is a £2.3m programme, led by the Caithness Chamber of Commerce, seeking to diversity the skills mixes within the Dounreay workforce and local supply chain.[24]

1.20 There are also a number of property developments ongoing in the area, with the aim of *"marketing the region as the place to do business in a modern, forward-looking and vibrant way."* These include the marine wave and tidal development at the Pentland Firth and Orkney Waters; developments at Scrabster Harbour, including a renewable energy facility and the creation of an industrial park; and the development of a 70 berth marina at Wick harbour.[25]

1.21 Further, 'Ambitious for Tourism – Caithness and North Sutherland' is an initiative led by HIE, working with partners, with the aim of *"bringing together public and private sector businesses and encouraging partnership working through a destination development approach."*

[19] Nuclear Decommissioning Authority (2009) *Socio-economic Caithness and North Sutherland Priority Area Plan*. June 2009, p. 3

[20] Nuclear Decommissioning Authority (2009) *Socio-economic Caithness and North Sutherland Priority Area Plan*. June 2009, p. 3

[21] Highland Works: Employability Development Plan 2010, p. 4

[22] Highland Council (2013) Single Outcome Agreement Between the Highland Council Community Planning Partnership and the Scottish Government 2013/14 – 2018/19, p.40

[23] SDS (2014) Highlands and Islands Skills Investment Plan

[24] http://www.mtrc.me.uk/about-us

[25] http://www.investcaithness.com/property/key-developments

The aim is to foster the development of Sustainable tourism in the area, as a key growth sector.[26]

1.22 Other initiatives include the development of six new workshops at Morefield Industrial Estate in Ullapool; HIE support to Handa Shellfish and to Loch Duart, an award-winning independent Scottish salmon farm based in Sutherland and the Hebrides; and the implementation of a home-working pilot which will create up to 15 jobs in Easter Ross. There is also a masterplan being implemented for John O'Groats, led by HIE and the private sector.[27]

1.23 The University of the Highlands and Island's (UHI) North Highland College, the area's principal institute of higher learning, will continue to support local industry with research, innovation, and overall skills development in line with community, regional and national priorities. A significant investment programme is currently underway on rationalising and developing the appropriate estate at the Thurso campus, and two key projects have been confirmed which will bring significant value to the local economy: a Centre for Energy and the Environment and an Engineering Skills Centre.[28]

[26] http://www.hie.co.uk/regional-information/area-information/caithness-and-sutherland/

[27] http://www.hie.co.uk/regional-information/area-information/caithness-and-sutherland/projects/

[28] http://www.investcaithness.com/property/key-developments/the-north-highland-college-uhi

2 Staying and Leaving

2.1 This section of the report considers whether respondents are likely to stay in or leave the H&I (and whether this is out of choice or out of necessity, real or perceived), and how respondents view the choices of others.

Self-identification

2.2 Young people in Caithness and Sutherland are more likely to want to stay in their local area than is the case across the H&I as a whole, and they are also much more likely to leave *reluctantly* than their counterparts from elsewhere in the region. In all, more than half (51%) regard themselves as **committed stayers**, eight percentage points higher than in the H&I as a whole (43%). Further, the proportion of **reluctant leavers,** at 23%, is considerably higher than the 13% across the wider region. As the report goes on to show, this reflects a strong attachment to local communities yet a perception of limited local employment availability. Correspondingly, a much smaller proportion of young people in Caithness and Sutherland (22%) describe themselves as **committed leavers** than regionally (40%).

Table 2.1

Which of the following best describes you? *Expressed in terms of % of total excluding potential returners, new residents and none of the above*	**Caithness and Sutherland (n=227)**	**Highlands & Islands (n=3,607)**
	%	%
Committed stayer*: I live in the H&I and I plan on living and working here*	51	43
Reluctant stayer*: I live in the H&I; I would prefer to leave but I don't think I will be able to*	5	5
Reluctant leaver*: I live in the H&I; I would prefer to stay but I don't think I will be able to live and work here*	23	13
Committed leaver*: I live in the H&I, but I plan to leave, and live and work elsewhere*	22	40

Geographic variations

2.3 Respondents from Sutherland are more likely to identify as committed leavers – around 28% do so, compared to just 17% in Caithness, which is still significantly lower than the regional average of 40%. In all, 47% in Sutherland are committed stayers compared to 53% in Caithness, against the 43% regionally. Sutherland has a slightly lower proportion of reluctant leavers (22%) than Caithness (24%).

Variation by age and status

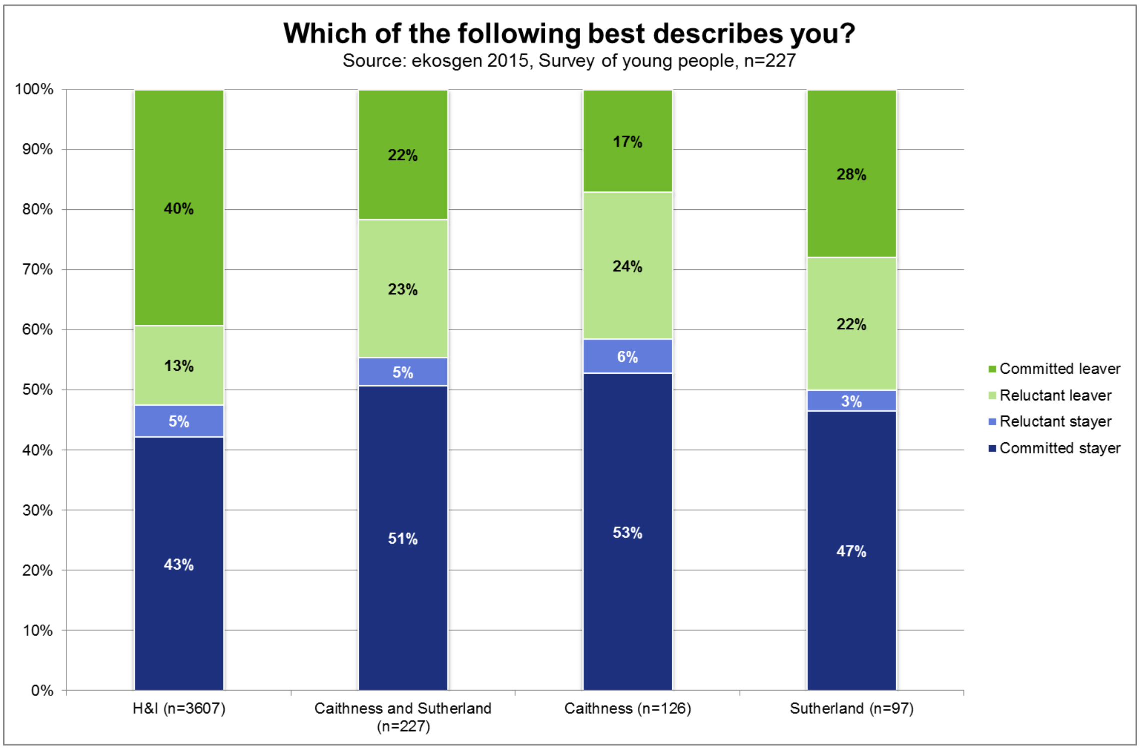
2.4 For Caithness and Sutherland as a whole, it is the 15-18 age group that is most likely to see themselves as committed leavers (42%), lower than for the H&I for this group (52%). This level remains at 42% for this age group in Sutherland, but rises to 58% in Caithness. More than twice the proportion of 25-30 year-olds in Sutherland are committed leavers (25%) compared with (12%), although both are above the regional average of 9%. Similarly, 25% of current university/college students are committed leavers compared to 20% regionally.

2.5 The vast majority of 25-30 year-olds in Caithness and Sutherland identify themselves as committed stayers (71%), with little sub-area variation. There is a more pronounced difference with the 19-24 age group, with 60% identifying as committed stayers in Sutherland falling to 48% in Caithness. For those in Caithness and Sutherland as a whole, it is 19-24 year-olds who are most likely to be reluctant leavers (31%), more than two-and-a-half times the regional rate for this age group (12%). This is related to the perceived lack of Further and Higher Education opportunities.

2.6 In keeping with the regional picture, the majority of school pupils are committed leavers (51%) compared to 56% across the H&I, rising to 67% in Caithness. However, a significantly higher proportion of school pupils than regionally identify themselves as *reluctant* leavers (26% versus 12% in H&I). Despite this, the proportion of committed stayers is lower than for the H&I (21% versus 23%), falling markedly to 11% in Caithness. In Sutherland school pupils are less likely to be committed leavers (49%), they are far more likely to do so reluctantly (27%) – more than double the proportion for Caithness and Sutherland (13%) and regionally (12%).

2.7 University and college students are far more likely to be reluctant leavers than any other group. In all, 39% describe themselves as such, rising to 42% of in Sutherland. This is more than two and a half times the proportion of students that are reluctant leavers regionally (16%).

Figure 2.1



Perceptions of stayers and leavers

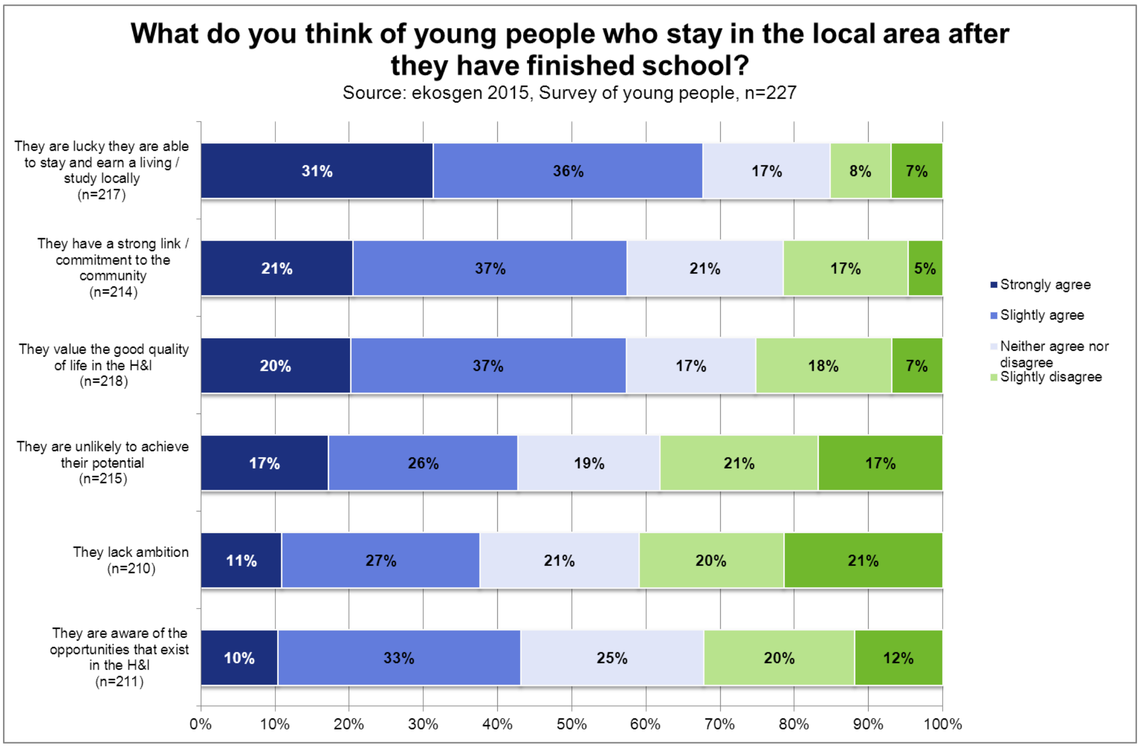
Views on those who stay

2.8 Almost six in 10 (58%) young people in Caithness and Sutherland view those who stay in the local area following school as having a strong commitment to the local community. This compares to 54% in the H&I. A similar proportion, 57%, also think that those who stay value the good quality of life in the H&I (58% regionally), whilst more than two thirds (67%; 31% strongly agreeing) think that they are lucky to be able to stay and earn a living or study locally, more than across the H&I as a whole (61%).

2.9 These positive perceptions of others' decisions to stay are somewhat higher in Caithness than in Sutherland. For instance, 59% of those in Caithness think that stayers have a strong link to their community (54% in Sutherland), and 61% think they value the good quality of life, 10 percentage points more than in Sutherland. However, those in Sutherland are more likely to think that those who stay are lucky to be able to do so (73% versus 65% in Caithness).

2.10 More negative perceptions of the decision to stay in Caithness and Sutherland are slightly higher than in the H&I as a whole. Just under four in 10 (38%) think that stayers lack ambition, compared to 34% regionally, whilst 43% think that others limit their potential (39% regionally). Negative perceptions are also stronger in Caithness – 39% think stayers lack ambition, and 46% think that they limit their potential.

Figure 2.2

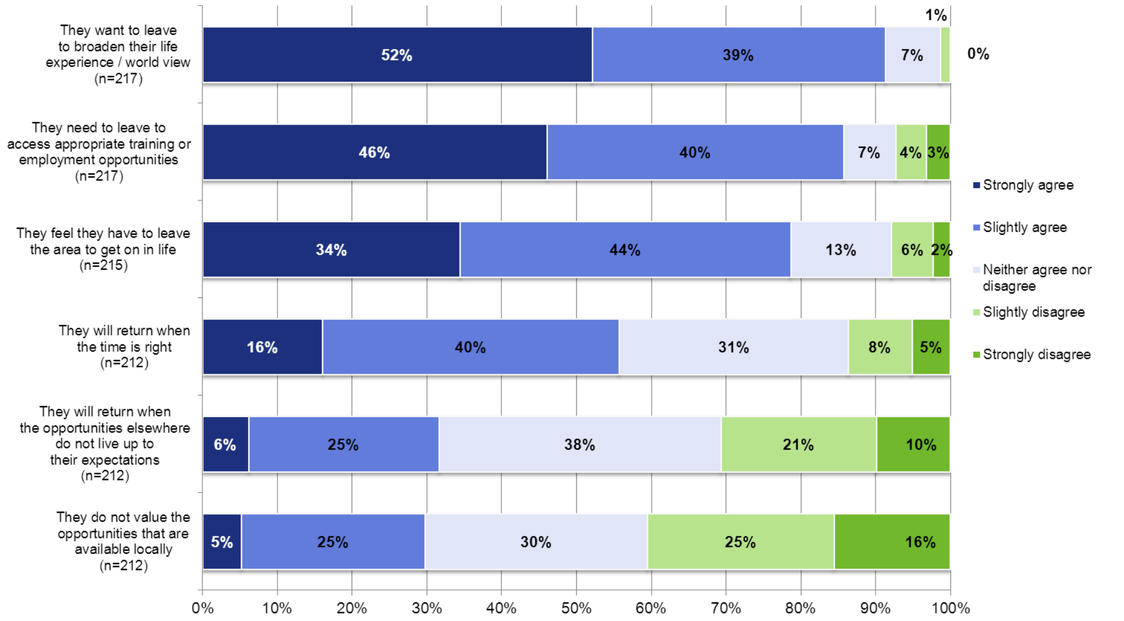


Views on those who leave

2.11 A total of 91% of young people in Caithness and Sutherland (93% in Caithness) agree that leavers wish to do so to broaden their world view, higher than the regional average (87%), although the proportion who strongly agree is comparable to the H&I as a whole (52%). Almost nine in 10 (86%) think that leavers do so to access appropriate training or employment opportunities, more than the H&I average of 78%, again highest in Caithness (89%). Over half (56%) consider that leavers will return when the time is right, equal to the regional figure. Overall, 78% think that leavers have to do so to get on in life, higher than the 71% regionally, and this is particularly high in Caithness (82%) compared to Sutherland (75%).

Figure 2.3

What do you think of young people who leave the local area after they have finished school?
Source: ekosgen 2015, Survey of young people, n=227

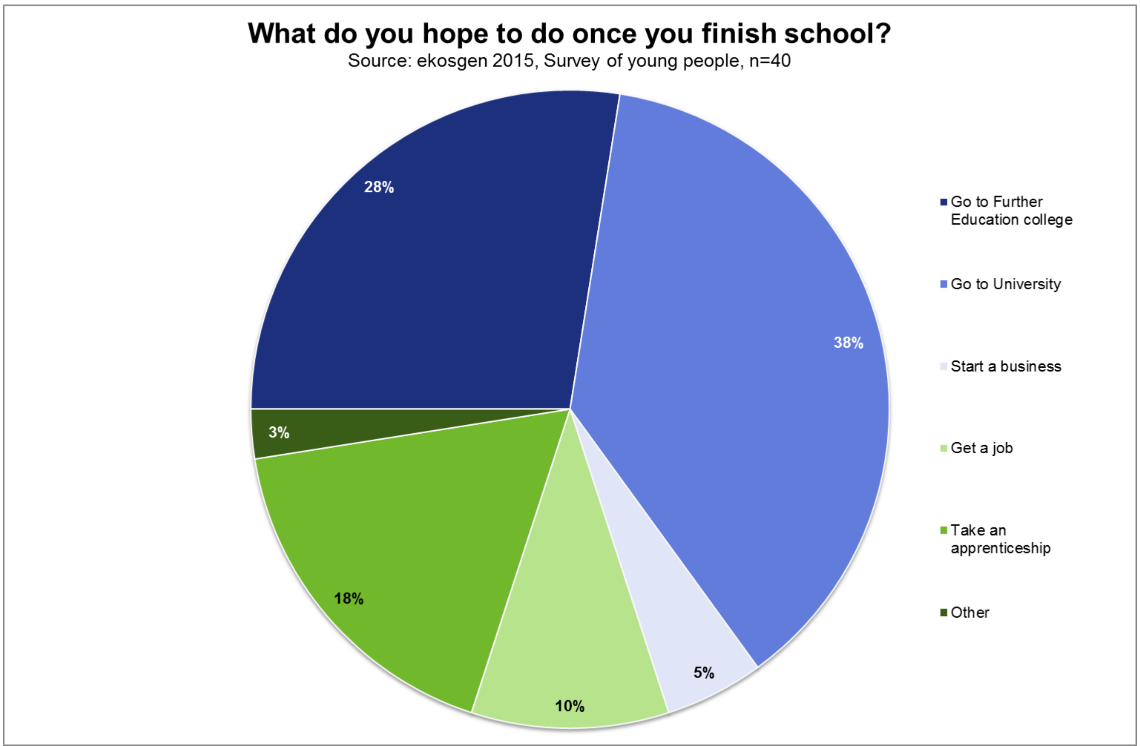


Aspirations of school leavers

2.12 Although the majority of school pupils in Caithness and Sutherland wish to go to university or undertake further education after leaving school (65%), this is lower than for the H&I area (72%). More wish to attend university (38%) than undertake further education (27%). However, there is a contrast between Caithness and Sutherland. In Caithness, 71% wish to go to university (greater than the 51% in the H&I), but none indicate a desire for further education (probably more a factor of sampling). However, 14% would like to start their own business, well above the regional average of 2%. In Sutherland just 28% want to go to university and 34% into further education. A fifth (19%) want to undertake an apprenticeship, indicating a greater preference for vocational training. In all, 13% of young people in Sutherland want to go straight into employment, which is comparable to regionally.

2.13 Across Caithness and Sutherland as a whole, just over one quarter of school pupils want to stay either locally (15%) or elsewhere in the H&I (12%) post-school. Although from a low base, the most popular destinations for post-school activity are locally, elsewhere in Scotland and elsewhere in the UK (15% each). For those wishing to stay locally this is slightly higher than for the H&Is as a whole (14%). A lower proportion wish to go to the Central Belt (12%, below the regional average of 19%), elsewhere in the world (12%, below the regional average of 18%), or Aberdeen (10%, above the 8% regionally). Whilst most in Sutherland (18%) wish to stay locally, *no* respondents from Caithness wish to do so; further, no respondents from Caithness wish to go to either elsewhere in the H&I or the Central Belt, yet 43% wish to go elsewhere in Scotland, and a further 29% want to go elsewhere in the world (though the number of responses here is quite low, so results should be viewed with caution).

Figure 2.4

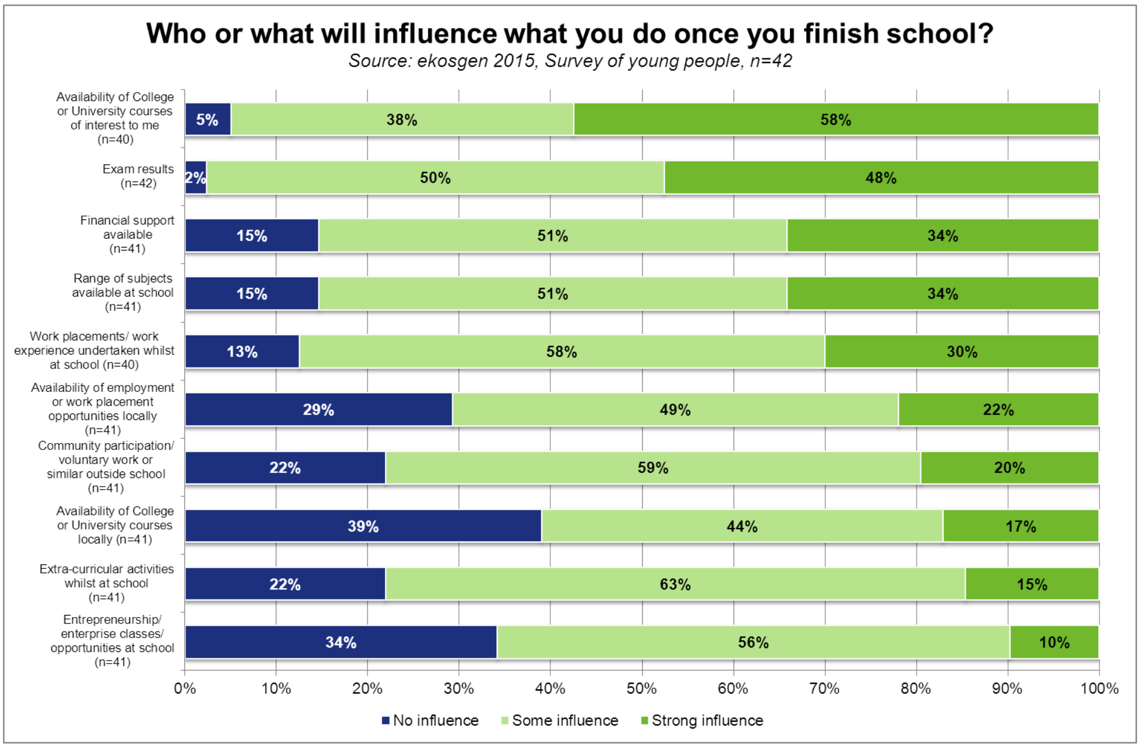


2.14 Males are much more likely to want to stay locally – 30% wish to do so compared with just 7% of females. Conversely, males are more likely to go to the Central Belt (20% versus 10% of females). In all, 14% of females want to go somewhere in the H&I after leaving school, and 21% elsewhere in Scotland (other than the Central belt or Aberdeen).

Factors influencing decisions after leaving school

2.15 The post-school decisions of young people in Caithness and Sutherland are influenced by a broader range of factors than elsewhere in the H&I. In all, well over nine in 10 young people consider that interesting college or university courses would have at least some influence, with 58% stating that this would be strongly influential, higher than the regional average (55% strongly, and 89% in total). Similarly, 98% (48% strongly so) stated that exam results are influential. The range of subjects available at school is more strongly influential in Caithness and Sutherland than in the H&I as a whole (85% compared with 80%), reflecting the importance of a strong/broad school curriculum.

Figure 2.5



2.16 Work experience / local work placements whilst at school seem to have a stronger influence on post-school decisions than in the H&I overall (88% versus 74%). This reflects both the strong vocational interest amongst those from Sutherland and the desire to gain work experience from those in Caithness. However, the availability of local employment / work placement opportunities, at 71% is slightly lower than the regional average. The availability of local college / university courses (61%) is also less influential than regionally (69%).

2.17 Within Caithness and Sutherland some differences are evident. For those in Sutherland, the availability of local college or university courses is more strongly influential (18% versus 14% in Caithness), whilst those in Caithness are more likely to view community participation and voluntary work as influential – 86% do so compared to 76% in Sutherland (61% in the H&I). Those in Caithness are also more likely to view work experience / placements as influential: all do so, 16 percentage points higher than Sutherland, and 24 percentage points higher than regionally. However, whilst 57% of those in Caithness thought that entrepreneurship and enterprise classes have little influence (a greater proportion than regionally), 73% of those in Sutherland think that they *are* influential.

3 Learning in Caithness and Sutherland

3.1 This chapter explores attitudes and aspirations evident in Caithness and Sutherland in relation to learning, covering Further Education (FE) and Higher Education (HE), and related matters such as graduate placements and the opportunities presented in terms of routes into employment from FE and HE.

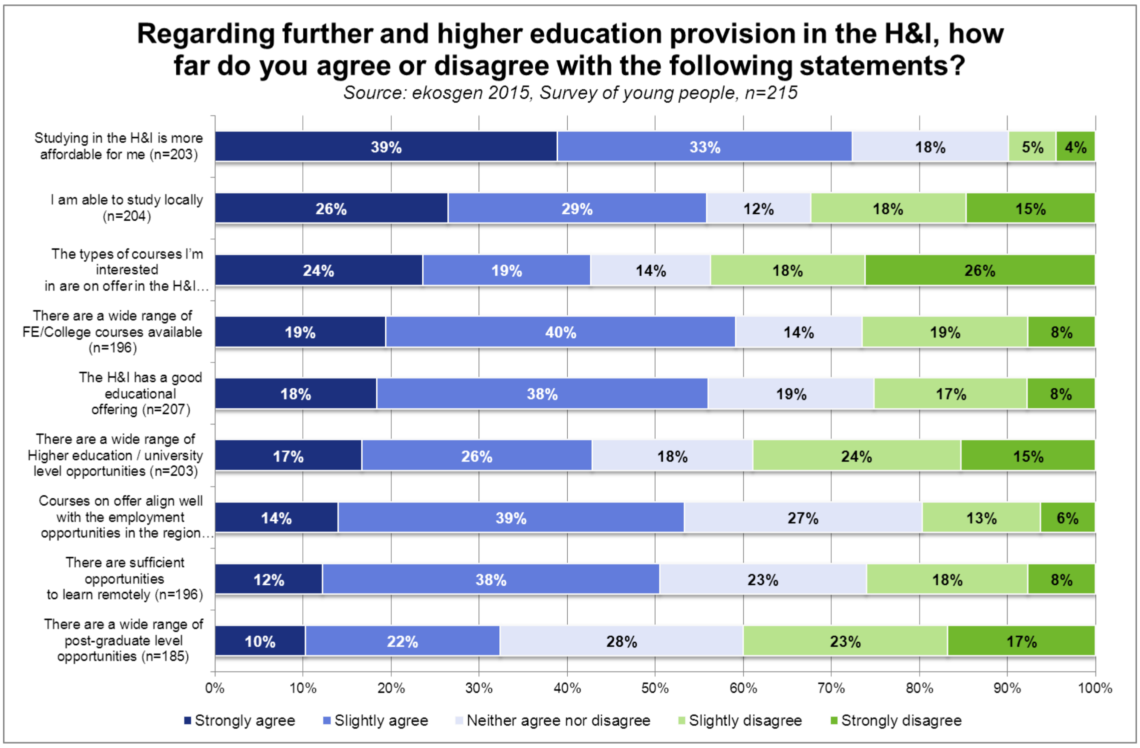
Further and higher education provision

3.2 Young people in Caithness and Sutherland generally consider there to be a good educational offering in the H&I. In all, 56% think so (and 18% strongly agree), both in line with the regional averages (56% and 17%). Over seven in 10 agree that studying in the H&I is more affordable, compared with 61% regionally. The proportion agreeing they are able to study locally (55%) is similar to that across the H&I (57%).

3.3 FE opportunities are viewed more positively in Caithness and Sutherland than is the case across the H&I overall, with 59% agreeing that there are a wide range of courses available, compared to 54% regionally. At 43%, perceptions of HE opportunities are comparable with the regional average (45%). Slightly more young people also agree that there are interesting courses available in H&I: 43% do so, compared to 40% regionally (though more also disagree (44% versus 42% regionally). A little over half (53%) think that the educational offer is well aligned to employment opportunities, in line with the H&I average.

3.4 More of those in Caithness think studying locally is affordable (78%, 42% strongly so) compared to 64% in Sutherland. Around 51% overall deem there to be sufficient opportunities to learn remotely, compared to 49% regionally, though in Sutherland, this falls to 44%, with only 7% strongly agreeing.

Figure 3.1



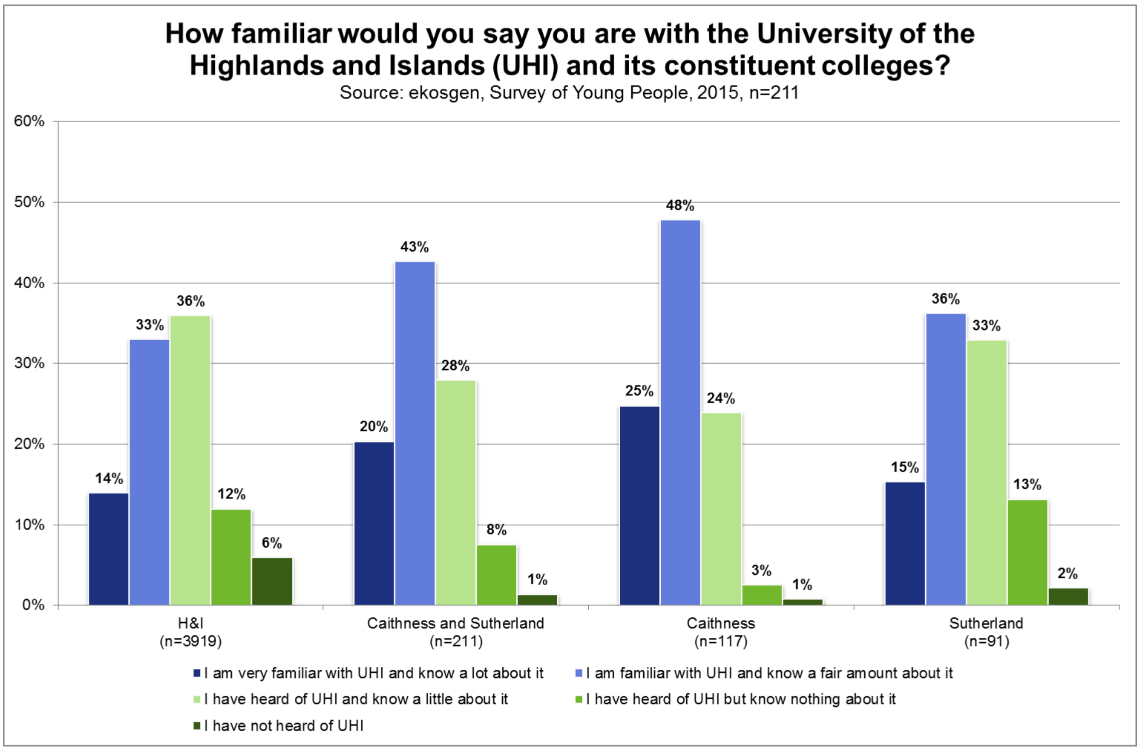
3.5 Young people aged 15-18, including school pupils, are more likely to *strongly* agree (23%) there is a good educational offering (as well as agree overall – 59%) when compared to other age groups. Fewer aged 25-30 think studying locally is affordable. Those at college / university, and those aged 15-18, are more likely to agree that the range of courses available is good, particularly FE courses (65% in the case of students). Additionally 75% of students agree that studying in the H&I is affordable, though only 56% of this group feel they are able to study locally.

3.6 Markedly fewer young people in Sutherland feel they can study locally in comparison with those in Caithness (40% compared to 69%). Additionally, fewer in Sutherland agree that studying in the H&I is more affordable; at two-thirds this is 14 percentage points lower than for Caithness, though still above the average for the H&I as a whole (61%).

Awareness of UHI and its offer

3.7 Although there is good awareness of UHI amongst young people in the H&I generally, this is even higher in Caithness and Sutherland. In all, some 91% know something about UHI (compared to 83% regionally), whilst 20% know a lot (versus 14% for the H&I). Awareness is strongest amongst those in Caithness, where nearly three quarters (73%) know at least a fair amount about UHI, around 22 percentage points higher than in Sutherland.

Figure 3.2



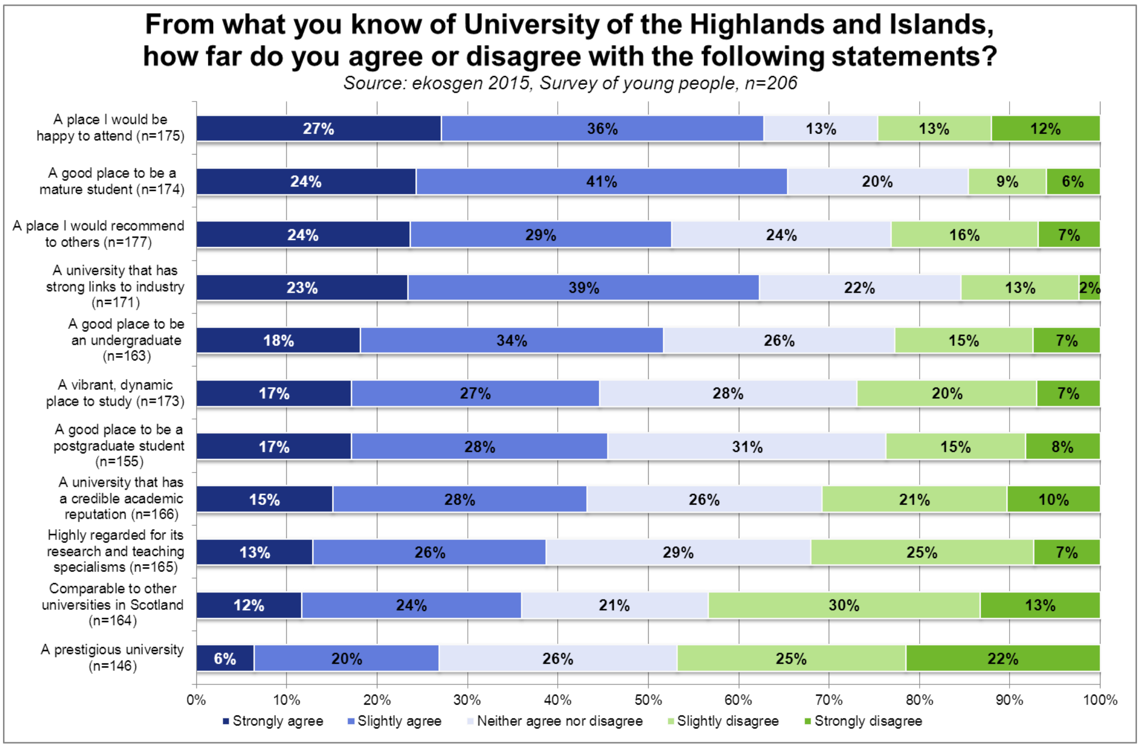
3.8 Awareness of UHI in general is highest amongst those aged 19-24 (65% know at least a fair amount) and students (78%). All of the responding 19-24 year-olds in Caithness and Sutherland have heard of UHI. In Sutherland, all of those aged 25-30 have heard of UHI, and in contrast to Caithness (and regionally) it is this age group that reports knowing most about UHI.

3.9 Two thirds of young people in Caithness and Sutherland (65%) perceive UHI as a good place to be a mature student, in line with the regional average of 64%, although in Sutherland this falls slightly to 62%. A larger proportion than regionally (52% versus 48%) see UHI as a good place to be *undergraduate* student, and the proportion is slightly higher amongst those from Caithness (53%) than in Sutherland (51%). Slightly more in Caithness and Sutherland (almost half) also rate its suitability for *postgraduate* study compared to the H&I (43%). More than half of *students* agree that it is good for undergraduate study – comparable to the regional figure (53%), though less agree strongly (17% versus 20%).

3.10 A similar proportion as regionally (43% compared with 42% for the H&I) think UHI has a credible academic reputation. In Caithness, 44% agree while almost one third disagree. However, more than four in 10 (43%) *do not* consider it comparable to other universities in Scotland, five percentage points higher than regionally; and higher still in Caithness (53%). In Sutherland, more *agree* that it is comparable (44%), with only 30% disagreeing.

3.11 Overall, 63% of young people in Caithness and Sutherland would be happy to attend UHI, higher than the H&I average of 57% and rising to 66% in Caithness. However for students and for 19-24 year-olds this falls to 55% (it is 58% regionally). In all, 66% of school pupils (and 67% of 15-18 year-olds) would be happy to attend UHI, which is considerably higher than the regional average of 50%. Further, 69% of 25-30 year-olds would also be happy to study at UHI.

Figure 3.3



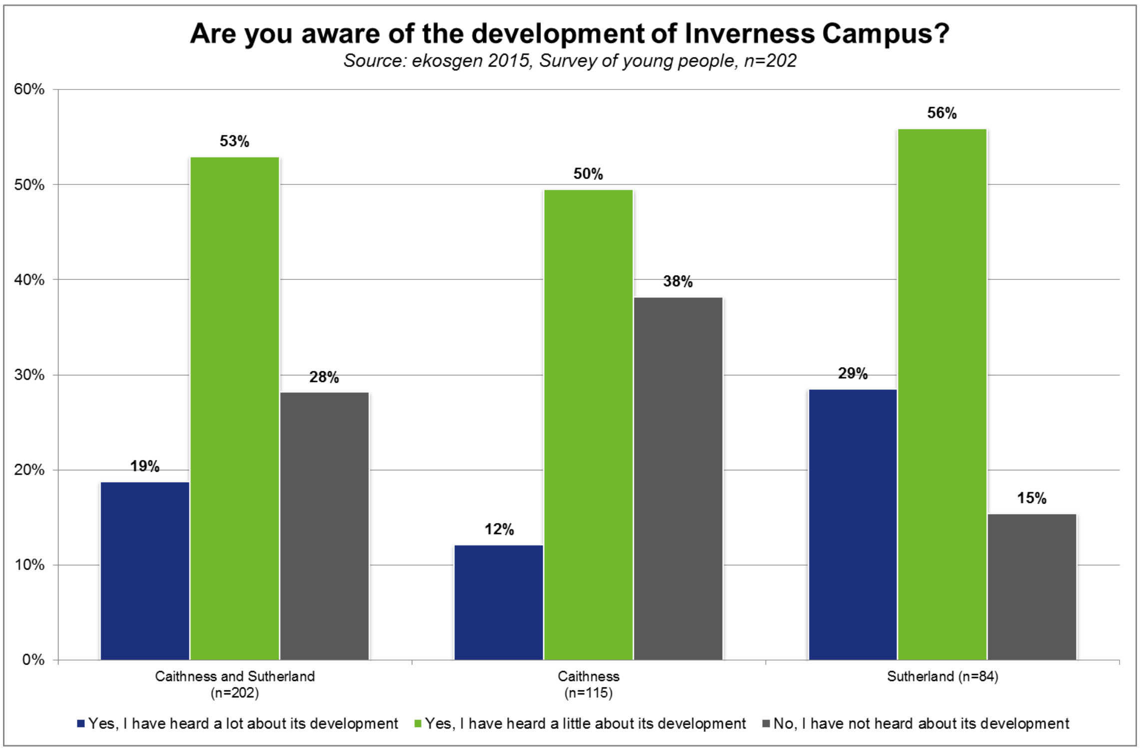
Inverness Campus

3.12 Inverness Campus, which will see Inverness College UHI co-located with centres for business and research, opened in May 2015. Whilst across the H&I, almost six in 10 know something of the Campus, 72% of young people in Caithness and Sutherland do so; further breaking down to 62% in Caithness and 85% in Sutherland.

3.13 This relatively strong knowledge of Inverness Campus is reflected in the positive views of the Campus. Whilst two-thirds think it offers a city university experience for the region (compared to 60% for H&I overall), just over half (52%) think it would help career aspirations (compared to 46% across the region). Also, 72% agreed (compared to 60% regionally) that the education-business-research links offer great opportunities for young people at the start of their careers.

3.14 Over six in 10 (62%) would recommend Inverness Campus to others, 10 percentage points above the regional average (52%). Young people in Caithness were particularly positive about the Campus development, the proportion strongly agreeing with statements on the Campus being several percentage points higher than in Sutherland, (and there being considerably more agreement overall). This was especially evident in terms of both the city university experience and the education-research-business links offering great career opportunities for young people, where around 80% agree, and 35% do so strongly.

Figure 3.4



Graduate placements

3.15 Almost six in 10 (58%) felt that undertaking a graduate placement would improve their chances of securing employment in the region (above the 53% regionally). However, a third considered there to be a wide range of placement opportunities (34%, compared to 31% for the H&I), and fewer still (29%, compared to 27% regionally) felt there were sufficient placement opportunities in the more rural areas. Three in 10 (31%) considered placements to be appealing, in line with the H&I overall (30%). It is worth noting that almost one-fifth *did not know* whether there were sufficient opportunities available.

3.16 Awareness of the ScotGrad programme in Caithness and Sutherland is slightly higher than across the H&I as a whole (25% versus 21%). The ScotGrad programme provides graduate and summer placements, and is designed to support business innovation, knowledge transfer and growth in the H&I by assisting graduates with their career progression, as well as encouraging young people to stay in the H&I, and overcome market failures around graduate recruitment and innovation, which tend to be particularly severe in remote rural areas. In all, 75% of respondents in Caithness and Sutherland are unaware of the ScotGrad programme, lower than regionally (79%). Awareness is highest in Caithness, where almost a third is aware of the programme (compared to 19% in Sutherland). A marginally higher proportion from Caithness has also applied (6%), with almost 4% overall being successful. This rises to 10% for those aged 19-24, with 6% being successful.

4 Working in Caithness and Sutherland

4.1 This section identifies what young people in Caithness and Sutherland think about local employment and career progression opportunities, their ideal location to work, familiarity with and interest in H&I growth sectors, and characteristics valued most in employers. Again it seeks to draw out sub-area variations where these exist.

Employment-Related Factors in the Local Area

Opportunities for Apprenticeships

4.2 Nearly half of young people in Caithness and Sutherland view local opportunities for apprenticeships positively (47%), although almost one third regard them as quite or very poor. This compares with 49% and 23% at regional level. Opportunities are rated more positively by those in Caithness (53%) compared to 38% in Sutherland. Within Caithness, young people in Thurso (55%) are more positive than those in Wick (50%).

4.3 Within Caithness and Sutherland, in terms of age group, young people aged 15-18 are the most positive about apprenticeships, with 58% rating opportunities as quite or very good (higher than the 53% for this age group across the H&I). University/ college students are more optimistic still, with 60% rating these opportunities positively.

Self-Employment Opportunities

4.4 Around a third (32%) of young people in Caithness and Sutherland rate local opportunities for self-employment as either quite (23%) or very good (9%), lower than the 29% and 10% respectively across the region. Those in Sutherland are more positive (39%, equal to the regional average), compared with 28% in Caithness.

4.5 Again, those aged 15-18 years are most positive, with 42% rating local self-employment opportunities positively (rising to 53% for school pupils specifically). In all, 27% of 19-24 year olds rate these opportunities positively, while a third of 25-30 year olds do so.

Opportunities for Personal Development

4.6 Just under a third (30%) of young people in Caithness and Sutherland rate local opportunities for personal development as either quite (25%) or very good (5%), lower than the 37% across the H&I. This is slightly higher in Caithness (31%) than in Sutherland (28%), although both are below the regional average. Within Caithness, young people in Thurso are more positive than those in Wick (33%, compared to 25%).

4.7 Those aged 15-18 were markedly more positive than other age groups about opportunities for personal development, with four in 10 rating these favourably, compared to around a quarter of 19-24 and 25-30 year olds.

Local Employment Opportunities

4.8 Almost a quarter of young people in Caithness and Sutherland rate local employment opportunities as quite (20%) or very good (4%), and this is some 11 percentage points lower than the 35% across the H&I. Those in Sutherland perceive local opportunities to be particularly weak (with just 18% thinking they are good), with perceptions a little more positive in Caithness (28%).

4.9 As with many of the other employment-related factors, young people aged 15-18 years are most optimistic, with 29% rating local employment opportunities as good, compared to 20% of 19-24 year olds and 23% of those aged 25-30. School pupils are most optimistic still, with 33% rating opportunities positively, although this is still two percentage points lower than the regional average for this group. The proportion reduces to 26% amongst those at university/ college, and further still to 20% amongst those in employment/ self-employment.

Pay Levels

4.10 Pay levels are rated poorly by young people in Caithness and Sutherland, with just one in five rating them as quite or very good, lower than the 27% across the region. This is slightly higher in Sutherland (22%) than in Caithness (20%). Within Caithness, those in Thurso are more positive, with nearly a quarter (24%) rating pay levels favourably, compared to just 12% in Wick.

4.11 Once again, those aged 15-18 are most positive about pay levels, with 31% rating them as quite or very good, compared to just 15% amongst 19-24 and 25-30 year olds. While 35% of school pupils rate pay levels positively; this reduces to 21% amongst university/ college students and 11% amongst those in employment/ self-employment.

Opportunities for Career Progression Locally

4.12 Only a fifth of young people rate opportunities for local career progression as quite or very good, lower than the H&I average of 29%. Again, this is slightly higher in Caithness (21%) than in Sutherland (16%) but for both areas the proportion is well below the regional average. School pupils are most optimistic (with 33% rating career progression opportunities positively), compared to 20% of university/ college students and 13% of those in employment/ self-employment.

Diversity of Employment Opportunities

4.13 The diversity of employment opportunities is viewed least positively of all, with fewer than one five (18%) rating these as quite or very good, compared to 29% across the H&I. Young people in Sutherland are slightly more optimistic (19%) than those in Caithness (16%).

4.14 Once again, school pupils are the most optimistic, with over a third (36%) rating diversity of employment opportunities positively, compared to 16% of college/ university students and 10% of those in employment/ self-employment.

Employment-Related Factors in the H&I

4.15 As elsewhere in the H&I, young people in Caithness and Sutherland think that there are more opportunities across the region than locally. The difference is most pronounced for the diversity of employment opportunities (37% in the H&I compared to 18% locally), opportunities for employment (42% compared to 24%) and opportunities for career progression (34% compared to 20%). The difference is least marked for apprenticeship opportunities (51% versus 47%) and pay levels (27% in contrast to 20%).

Figure 4.1

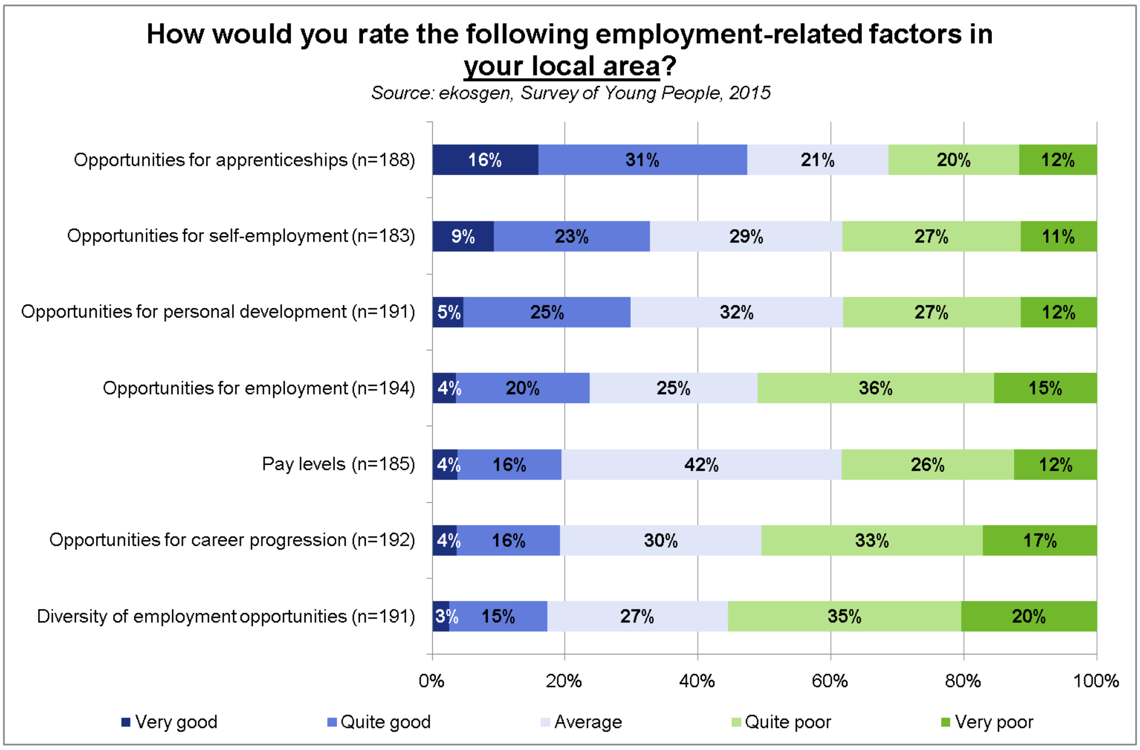
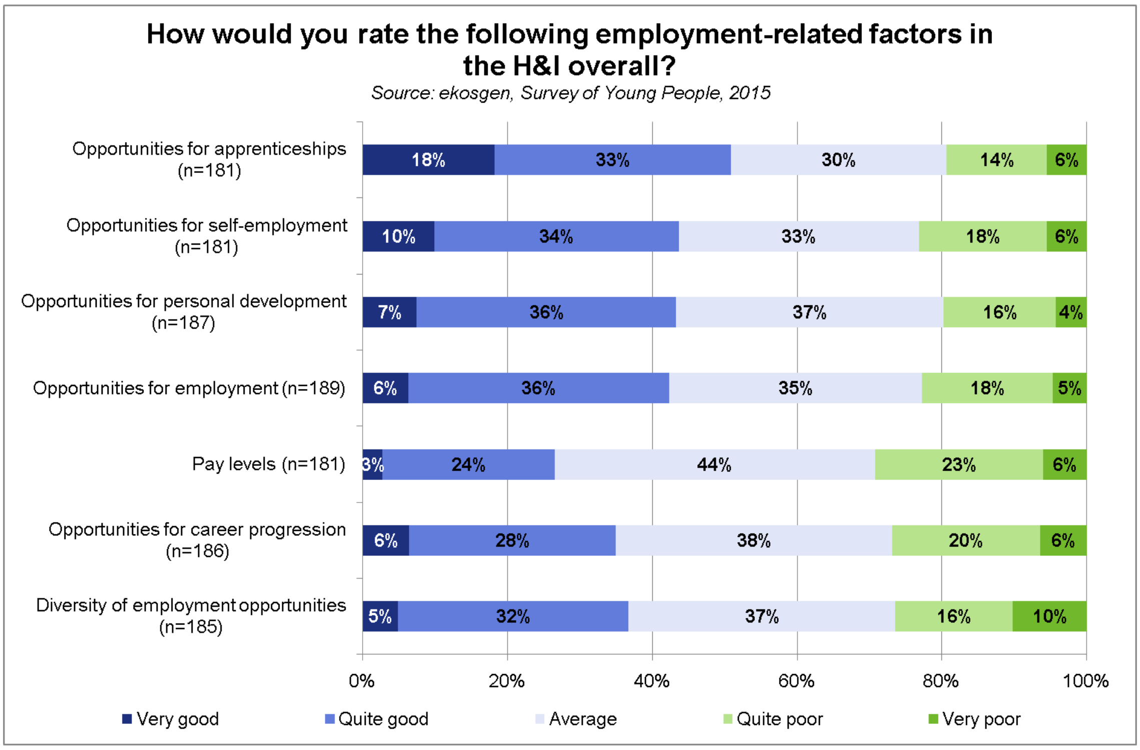


Figure 4.2



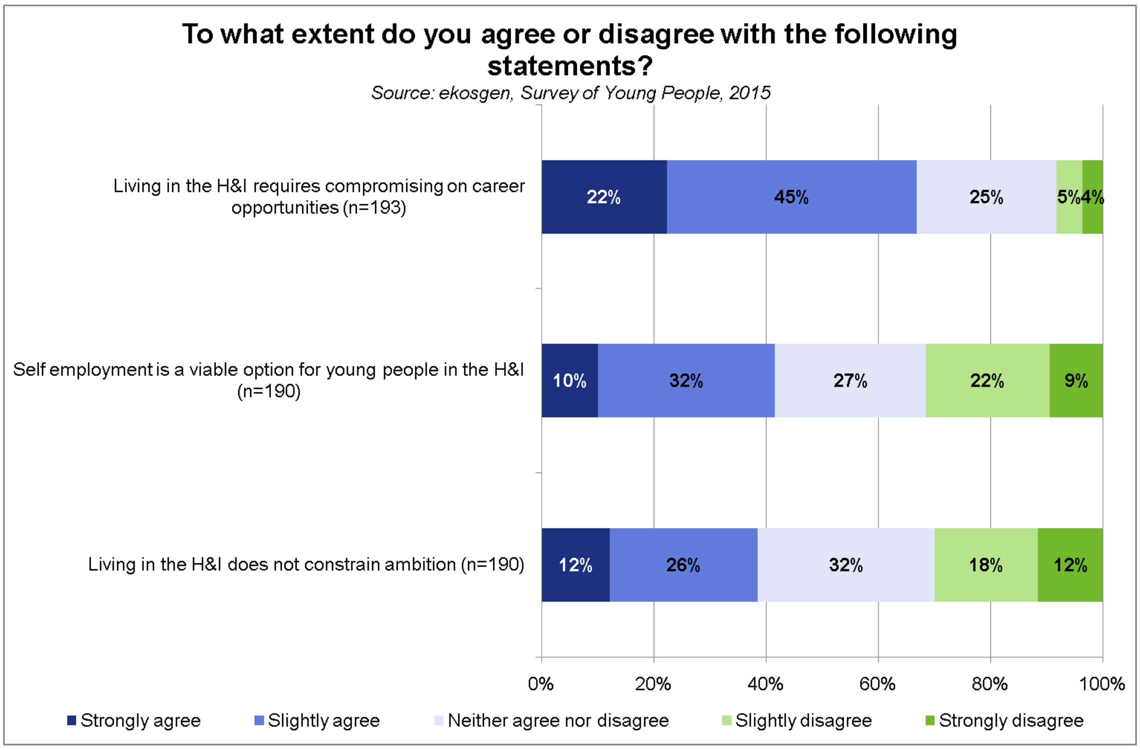
4.16 In all, over two thirds (67%) of young people in Caithness and Sutherland either strongly (22%) or slightly (45%) agree that living in the H&I requires compromising on career opportunities, and this is above the regional average of 60%. Those in slightly higher in Caithness compared to Sutherland (69% versus 65%) and, within Caithness, this is most marked in Wick (80% agreeing) compared with Thurso (65%). Further, young people aged 19-

24 are more inclined to agree compromise is required (72%) compared to 68% of 25-30 year olds and 58% of 15-18 year olds.

4.17 Just over four in 10 young people in Caithness and Sutherland slightly (32%) or strongly (10%) agree that self-employment is a viable option in the H&I, just under the regional average of 45%.

4.18 In all, 38% agree that living in the H&I does not constrain ambition, which is close to the 39% across the H&I. More than four in 10 young people in Caithness agree (42%), although this falls to a third in Sutherland. Within Caithness, nearly half (46%) of those living in Thurso agree, compared to just 35% in Wick.

Figure 4.3



Ideal place to work

4.19 Just over a third (36%) of young people in Caithness and Sutherland would like to work locally, compared to 29% across the H&I, and a further 21% would like to work somewhere in the H&I, again a higher proportion than the 15% regionally.

4.20 In all, a quarter would like to work outwith the H&I but somewhere in Scotland (as would 26% regionally): 10% in the Central Belt, 4% in Aberdeen and 11% elsewhere in Scotland. Just 5% would like to work elsewhere in the UK (just below the H&I wide average of 7%) and 12% would like to work elsewhere in the world (compared to 20% across the H&I).

4.21 Table 4.1 shows where young people would ideally like to work by sub-area. Those in Caithness have the greatest connection to their local area, with 45% ideally wanting to work locally, compared to 25% in Sutherland. In contrast, over twice as many young people from Sutherland (29%) would like to work somewhere else in the H&I than is the case in Caithness (14%).

Table 4.1: Desired Place to Work by Sub-Area

	Caithness and Sutherland (n=195)	Caithness (n=110)	Sutherland (n=83)
Local area*	36%	45%	25%
Somewhere in the H&I	21%	14%	29%
Central Belt	10%	10%	10%
Aberdeen	4%	3%	5%
Elsewhere in Scotland	11%	14%	7%
Elsewhere in the UK	5%	2%	10%
Elsewhere in the world	12%	12%	12%
Other	2%	2%	2%

*Source: ekosgen, Survey of Young People, 2015; * current home town/village*
Please note, percentages may not sum due to rounding.

4.22 The proportion wanting to work in their local area or somewhere else in the H&I generally increases with age/ stage. Across Caithness and Sutherland, 58% of 25-30 year olds want to work locally, and 15% somewhere else in the H&I; this is 36% and 23% respectively for 19-24 year olds; and 15% and 25% for 15-18 year olds.

In all, two thirds of those in employment or self-employment want to work either locally (51%) or elsewhere in the H&I (16%). School pupils are the least likely to want to do so (16% and 14%), whilst they are most likely to want to work elsewhere in the world (24%). This is typical of the age group and not confined to young people in Caithness and Sutherland. University/ college students are most likely to want to work elsewhere in the H&I (27%) compared to the other groups.

4.23 Table 4.2 (below) compares the percentage of those wanting to work locally alongside the proportion thinking there is good *diversity* of local employment opportunities to give an indication of perceived supply of diverse jobs versus demand. Far greater proportions wish to work locally than consider there to be a good range of diverse opportunities (a 19 percentage point difference across Caithness and Sutherland). This is most pronounced in Caithness, where 45% would like to work locally but just 16% rate the diversity of employment opportunities as quite or very good.

Table 4.2

Caithness and Sutherland sub-area	Those ideally liking to work in their local area	Those rating diversity of employment opp's as quite or very good	Percentage point (pp) difference
Caithness	45%	16%	-29%
Sutherland	25%	19%	-6%
Overall Caithness and Sutherland average	*36%*	*17%*	*-19%*

Source: ekosgen, Survey of Young People, 2015.

Views on H&I Growth Sectors

4.24 HIE's Operating Plan recognises that the region's natural assets, ambition, skills base and cultural background provide a range of opportunities to develop a vibrant sectoral economy.[29] HIE's growth sectors - *Financial and business services*; *Creative industries (including digital); Sustainable tourism (including hospitality); Food and drink; Life sciences*; and

[29] HIE (2014) Building Our Future: Operating Plan 2014-2017

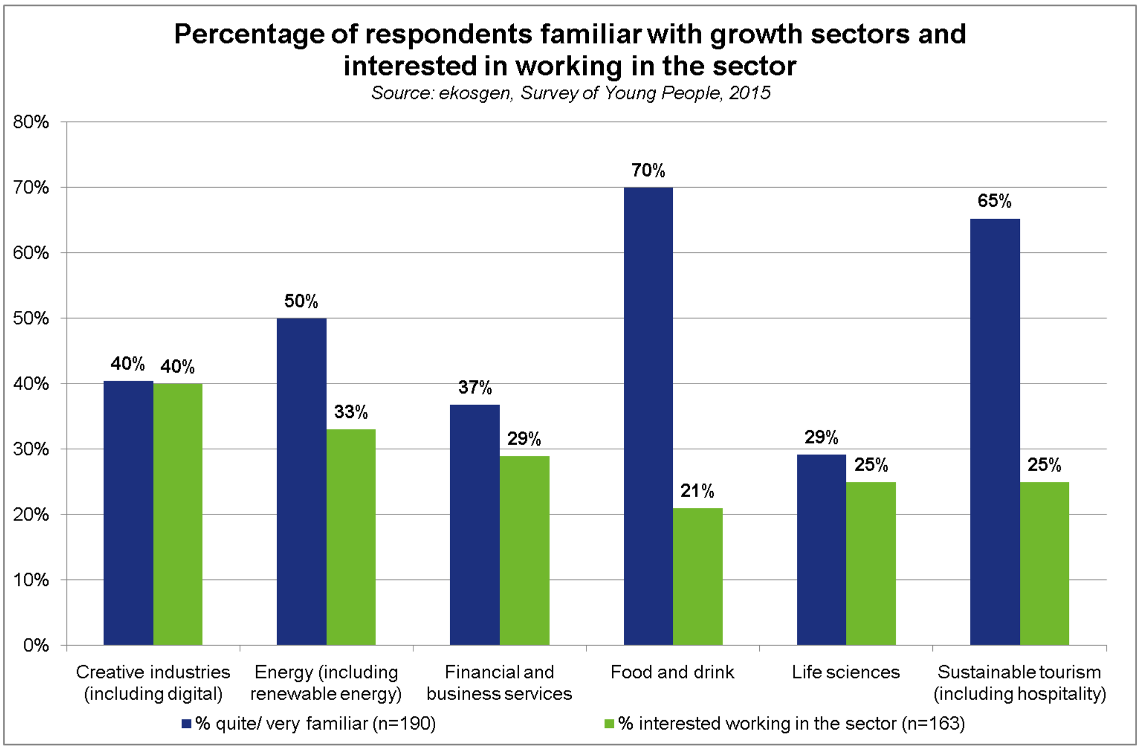
Energy (including renewable energy) are aligned to the key sectors identified in the Scottish Government's Economic Strategy, but with key regional specialisms under each sector.

4.25 The most well-known sector in Caithness and Sutherland amongst young people is Food and drink (70%), followed by Sustainable tourism (65%). Awareness of growth sectors is equal or higher than awareness levels elsewhere in the H&I. This is particularly true for Food and drink (70% in Caithness and Sutherland versus 62% overall), Sustainable tourism (65% versus 60%), Financial and business services (37% versus 32%) and Energy (50% compared to 45%).

4.26 As in the rest of the H&I, Creative industries emerged as the most desirable sector for young people in Caithness and Sutherland, with 40% interested in working in the sector (equal to the percentage that is aware of the sector). This is followed by Energy (33%) and Financial and business services (29%). A quarter of young people (25%) are interested in working in Life sciences and Sustainable tourism, while just over a fifth (21%) are interested in working in Food and drink.

4.27 Figure 4.4 compares the level of awareness of growth sectors with interest in working in the sector. The greatest disparities are in Food and drink (70% compared to 21%), Sustainable tourism (65% versus 25%) and Energy (50% in contrast to 33%).

Figure 4.4



Desired Qualities in Employers

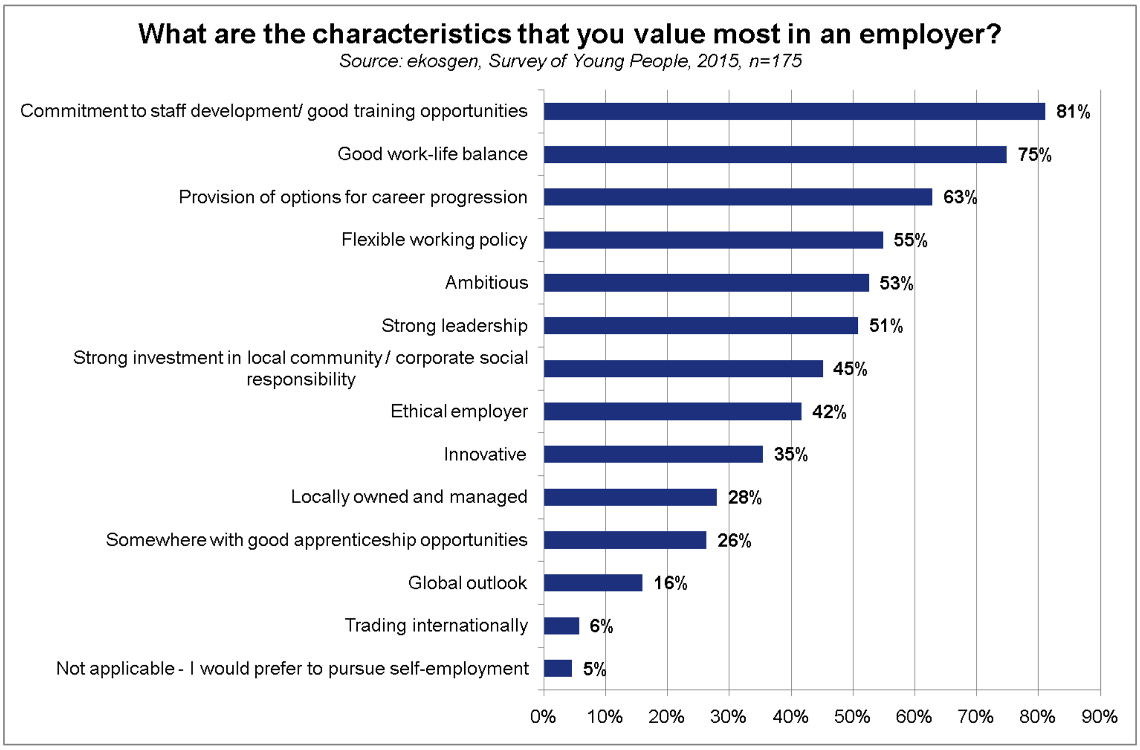
4.28 Young people in Caithness and Sutherland have broadly similar views to those in the rest of the H&I on what they value in employers, the most important being a commitment to staff development and training (cited as important by 81% of young people in Caithness and Sutherland, even higher than the 76% across the H&I). This is followed by a work-life balance (75% compared to 74% in the H&I) and the provision of options for career progression (63% compared to 58%), reflecting the strong desire to see more local opportunities to progress. Also important is a flexible working policy (55%, compared to 56% across the H&I), an ambitious nature (53% compared to 56%) and strong leadership (51% compared to 57%).

4.29 As is the case across the region, ethical business practices are also relatively highly valued by young people in Caithness and Sutherland, with 45% valuing a strong investment in the local community/ corporate social responsibility (compared to 44% regionally), 42% an ethical employer (versus 44%) and a locally owned and managed business (28%, versus 27%).

4.30 In contrast, young people in Caithness and Sutherland are even less interested in a global outlook from employers than is the case across the H&I (16%, versus 22% regionally) and in an employer that trades internationally (6%, versus 12%). This may suggest that young people in Caithness and Sutherland place a high value on an employer that is rooted in the local area, rather than one with a more outward-looking perspective. It may also reflect a lack of understanding about the benefits of international trade to local businesses.

4.31 There are some sub-area variations, with young people from Sutherland preferring strong leadership (59% versus 46% in Caithness), locally owned and managed business (32% versus 23%), and a strong investment in the local community/ corporate social responsibility (49% compared to 41%). In contrast, respondents from Caithness are more likely to value an employer who provides a good work-life balance (75% compared to 73%).

Figure 4.4



5 Life aspirations in Caithness and Sutherland

5.1 There are a range of other factors, beyond education and employment, which affect a young person's decision on whether to stay or leave Caithness and Sutherland. These include housing, transport, mobile and internet connectivity, arts, leisure and culture and the strength of the local community. Any significant variations by sub-region within Caithness and Sutherland are outlined in the analysis.

Housing

5.2 As the overall H&I report shows, the lack of available and affordable housing is a serious issue for young people[30] and one that has risen in importance since 2009, relative to other factors. Whilst market conditions mean that housing has likely become an issue for young people more generally, housing availability and affordability are clear concerns for young people in the H&I. This is also true for young people in Caithness and Sutherland.

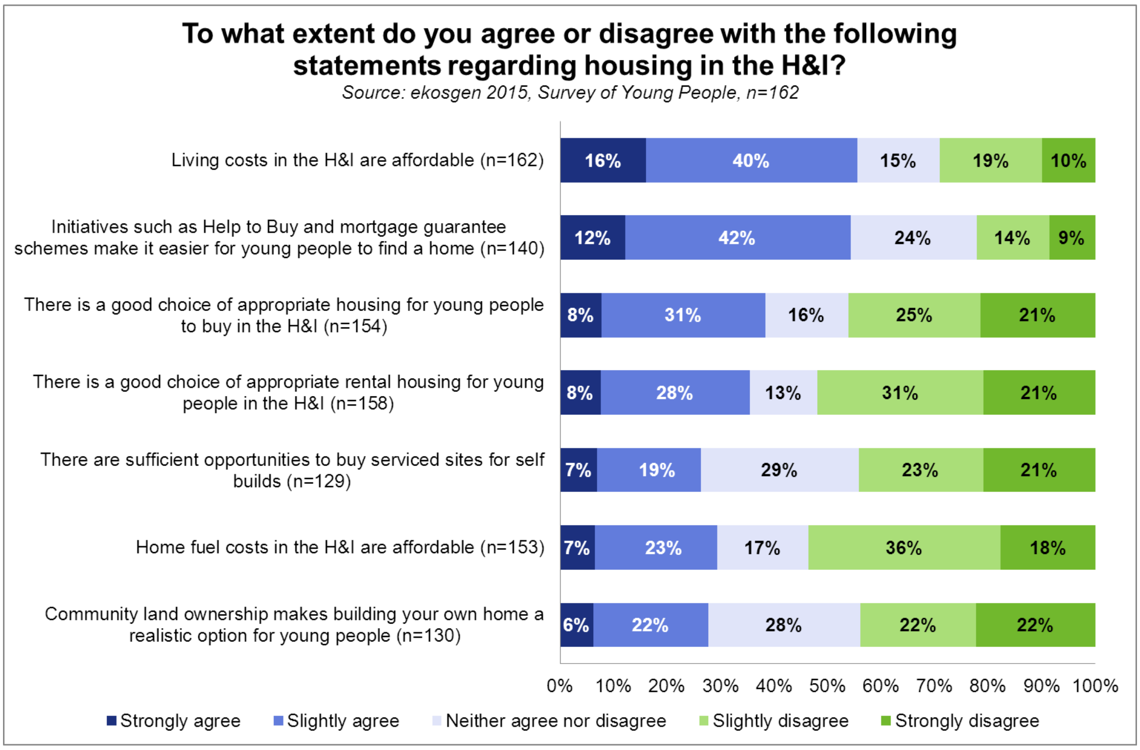
5.3 In terms of housing in the region, the views of young people in Caithness and Sutherland are more positive than those across the H&I. Almost four in 10 (39%) consider there to be an appropriate choice of housing *to buy*, compared to 26% across the H&I, while 46% disagree, compared to 57% across the H&I. Similarly, just over one third (36%) think there is a good choice of appropriate *rental* housing in the H&I, more positive than the 29% regionally, although just over half (52%) disagree, close to the 53% regionally.

5.4 A greater proportion that regionally considers living costs in the H&I to be affordable (56%, compared to 41%). However, this masks a considerable mismatch within Caithness and Sutherland. Significantly more of those in Caithness (63%) regard costs as affordable, compared with 42% in Sutherland.

5.5 Almost three in 10 (28%) young people in Caithness and Sutherland agree that community land ownership makes building your own home a more realistic option – in line with the regional average. A marginally smaller proportion (26%) agree that there are sufficient opportunities to buy serviced sites for self-build, although again this is in line with those from across the H&I.

[30] The Housing questions were only asked to those respondents via the main online survey, i.e. they were not asked in the schools paper and online surveys.

Figure 5.1



Transport

5.6 Transport is a key issue for young people in Caithness and Sutherland, particularly amongst those from Sutherland.

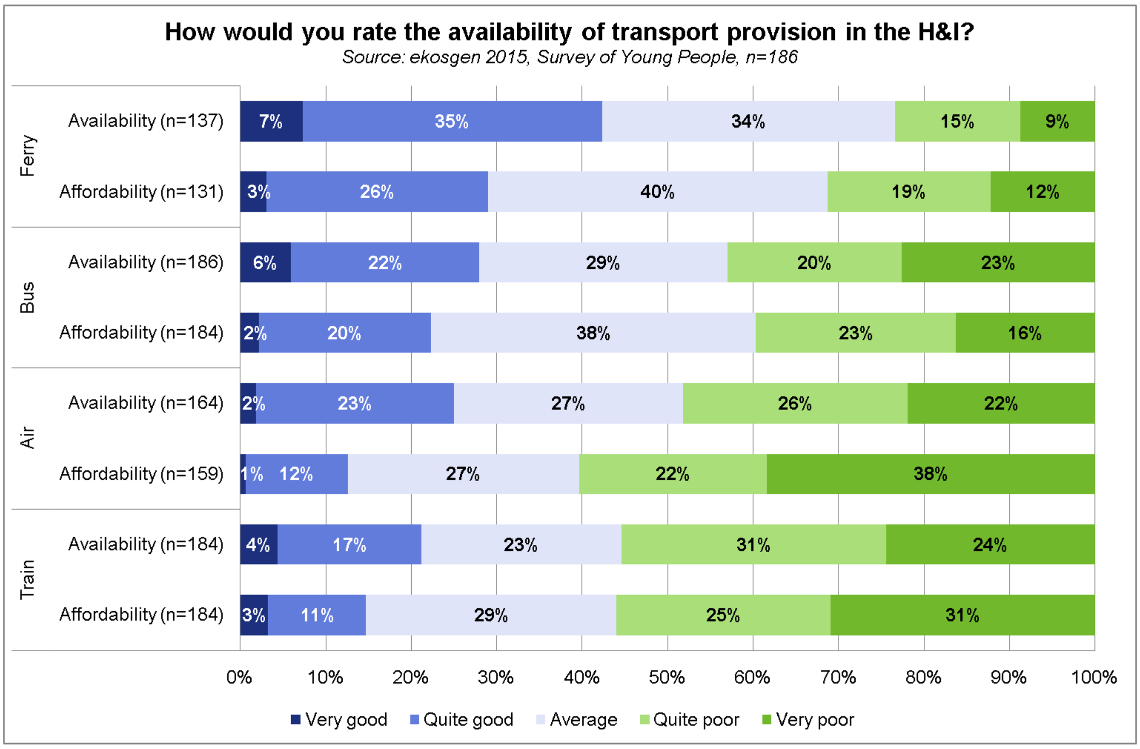
5.7 **Ferry** services are the most well rated transport mode for young people living in Caithness and Sutherland. Ferry availability is rated as good by over four in 10 (42%), in line with the H&I average. This rises to 55% in Caithness, possibly due to the ferry links to Orkney from Gills Bay, Canisbay and Scrabster, and Thurso ferry terminals, but falls markedly to 19% in Sutherland. Around three in 10 (29%) rate ferry affordability as good, in line with the regional average. A similar proportion (31%) rate them as poor.

5.8 **Bus services** are rated second in terms of availability, by over a quarter (28%), well below the regional average of 40%, although a far greater proportion (43%) rate bus services as poor. A lower proportion (22%) rated bus affordability as good, and this is well below H&I as a whole (34%). Almost twice as many (39%) rated them as poor.

5.9 The *availability* of **air travel** within Caithness and Sutherland is rated as at least 'quite good' by one quarter (25%) of young people. With Wick John O'Groats airport in Caithness the only airport in the area, air travel is more available to those from Caithness (30%) than those from Sutherland (16%). The *affordability* of air services is rated poorly by six in 10 (60%) young people, and this is felt most acutely in Caithness.

5.10 **Train travel** is the least *available* (21%) and *affordable* (14%) transport mode in Caithness and Sutherland, and this is the lowest across the H&I (with the exception of the Outer Hebrides who have no railway). Trains are considered more available (25% versus 18%) although less affordable (9% versus 19%) to those in Sutherland than in Caithness.

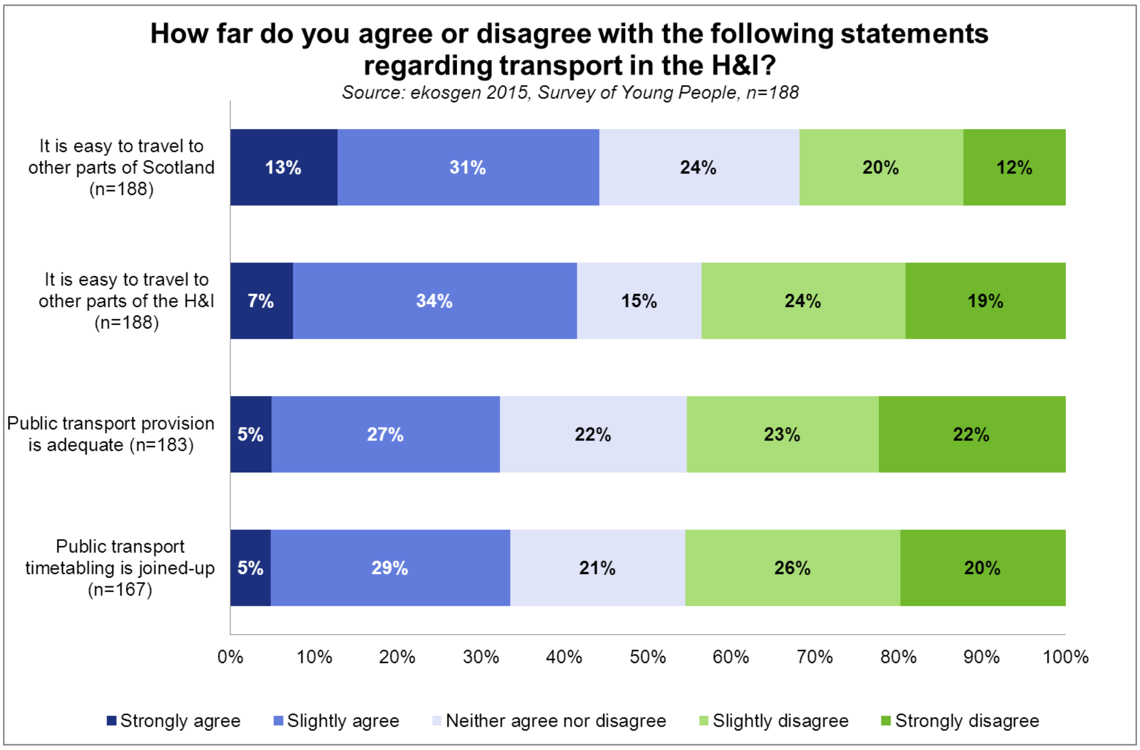
Figure 5.2



5.11 There is a slight disconnect between young people in Caithness and Sutherland and the rest of the country. Just over four in 10 (44%) agree that it is easy to travel to other parts of Scotland from Caithness and Sutherland (the lowest proportion across the H&I), and to travel to other parts of the H&I (41%). For both, these are below the regional averages (56% and 49%), linked to poor air, bus and train availability and affordability. Those from Sutherland feel significantly more isolated from the rest of Scotland than those from Caithness.

5.12 Around a third (34%) agree that public transport timetabling is joined-up, in line with the regional average, and almost half (46%) disagree. There is little variation within the area. Just a third of young people agree that public transport provision is adequate, which is below the H&I average of 40%, and lower in Sutherland (26%) than Caithness (38%)

Figure 5.3

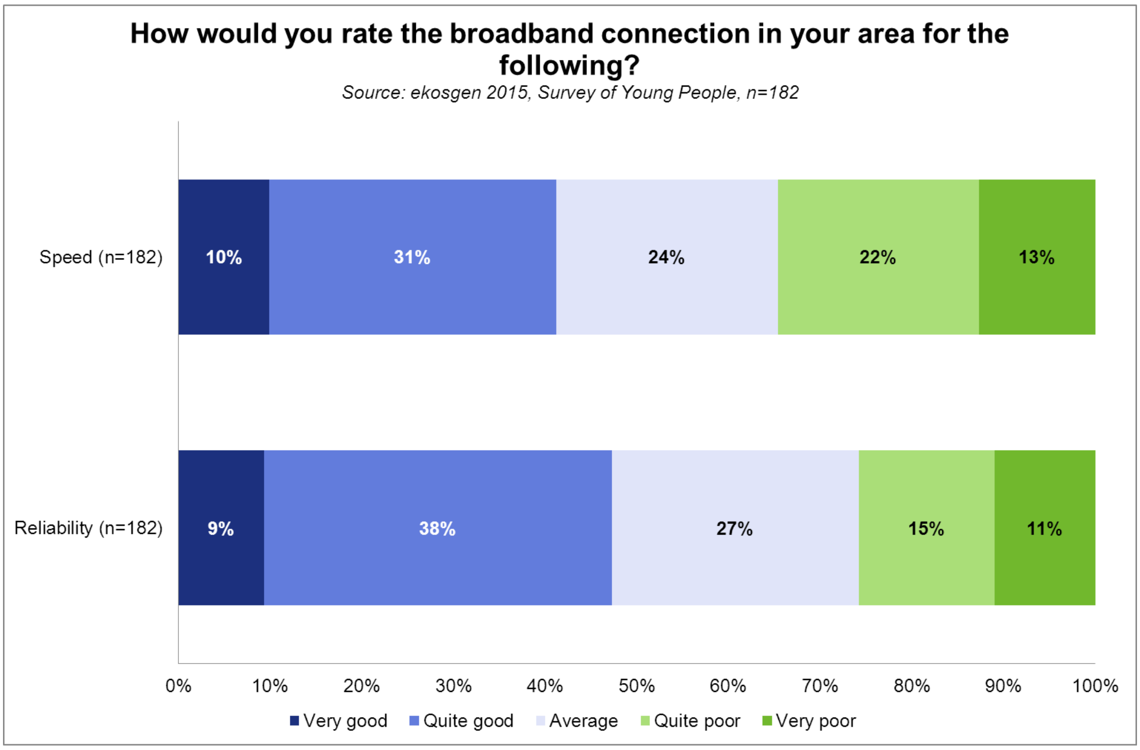


Digital Connectivity

5.13 In all, 96% of young people in Caithness and Sutherland have access to broadband internet (standard broadband or NGA broadband), in line with the H&I average, although the vast majority of this is standard broadband. Just 10% had access to NGA broadband at the time of the survey (April 2015), compared to 14% across the region, although this is set to rise significantly in the next 12-18 months with the roll out of NGA. At 62%, awareness of the NGA roll-out is higher in Caithness and Sutherland than any other part of the H&I, with the exception of Orkney.

5.14 Broadband *reliability* in Caithness and Sutherland rates favourably, with almost half (47%) of young people rating it positively, compared to the regional average of 43%, and around one quarter (26%) rating it negatively. Broadband *speeds*, however, are rated positively by a smaller proportion of young people (41%), although this is still above the 38% average across the H&I. Both broadband reliability and speed are rated better by young people from Caithness than by those from Sutherland.

Figure 5.4

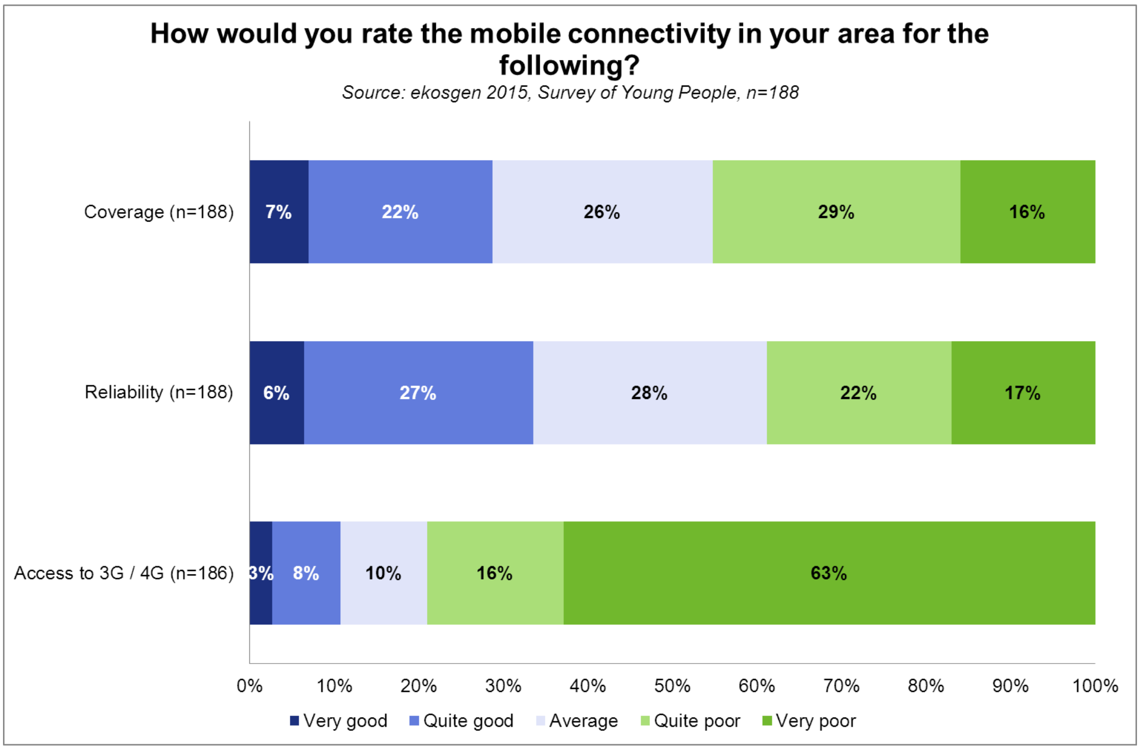


5.15 The three key benefits of NGA broadband reported by young people in Caithness and Sutherland were the same as for those across the H&I, namely 1) better music, film and entertainment streaming 2) improved communication with family and friends and 3) better access to education and learning materials.

5.16 Mobile connectivity in Caithness and Sutherland is rated poorer than broadband connectivity, and slightly fewer young people perceive mobile connectivity to be good compared to the H&I average. Around one third (33%) rate mobile *reliability* positively (compared to 35% across the H&I), and almost three in 10 (29%) rate mobile *coverage* positively, in line with the regional average. Those from Sutherland rate mobile reliability and coverage slightly better than young people in Caithness.

5.17 Most notably, almost two thirds (63%) of young people from Caithness and Sutherland rate access to 3G/4G as ‘very poor’, and this is significantly higher than regionally (47%). Just one in 10 (11%) in Caithness and Sutherland rate 3G/4G access positively.

Figure 5.5



Arts, Leisure and Culture

5.18 As with the H&I as a whole, there is a mixed picture on the perceived availability and strength of the arts, leisure and culture offer in Caithness and Sutherland. In general terms, however, the offer in Caithness and Sutherland is perceived as far less available than in other parts of the region.

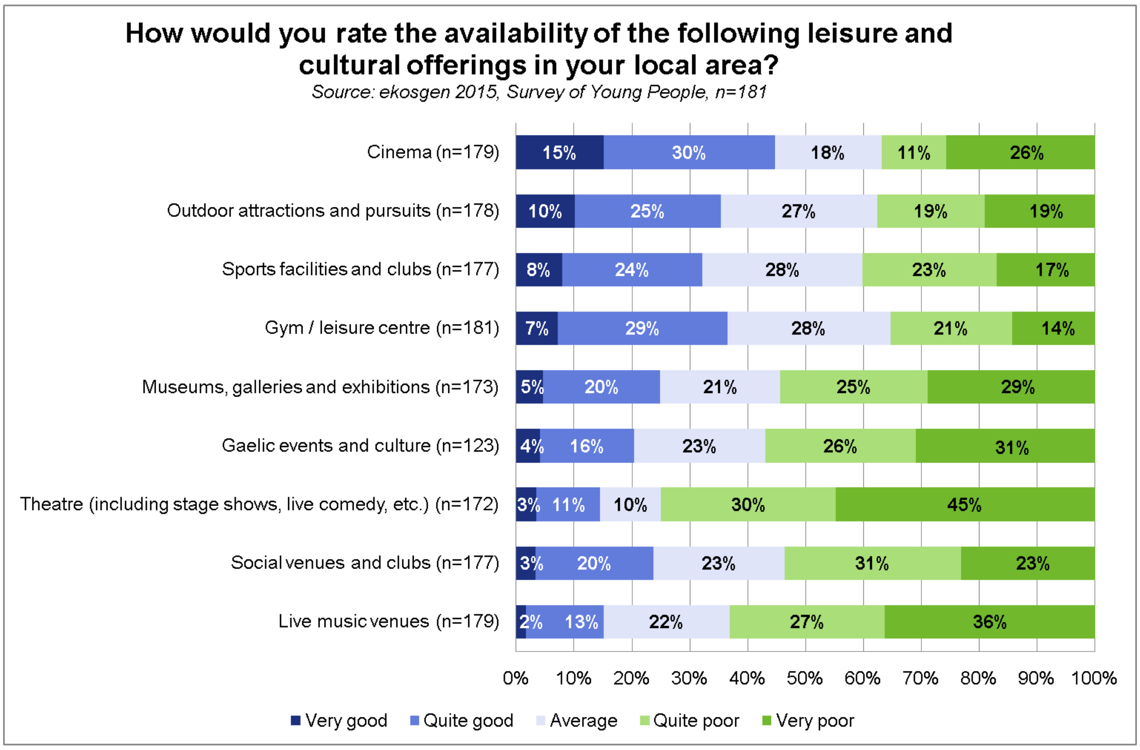
5.19 The top three most available offers in Caithness and Sutherland are cinema (rated as quite or very good by 45% of young people, compared to 39% for the H&I overall), gyms/ leisure centres (36%, compared to 59%) and outdoor attractions and pursuits (35%, versus 52%). Of the nine cultural offerings covered in the survey, only access to cinema in Caithness and Sutherland ranks above the regional average.

5.20 Access to sports facilities and clubs (32%, compared to 53% for the H&I), museums, galleries and exhibitions (25%, compared to 27%), social venues and clubs (23% compared to 27%) and Gaelic events and culture (20%, compared to 34%) are all rated below the regional average.

5.21 The least accessible offerings in Caithness and Sutherland are live music venues and theatres, both rated positively by around one in seven young people.

5.22 On the whole, there is significant variation in the perception of cultural offerings between those from Caithness and those from Sutherland. Cinemas, social venues, museums, live music venues and theatres are more accessible to those from Caithness, while outdoor attractions, gyms and leisure centres and Gaelic events and culture are more available to young people living in Sutherland.

Figure 5.6



5.23 There is a high degree of disparity between the availability and importance of cultural offerings for young people in Caithness and Sutherland. The greatest mismatch occurs with live music venues (79% rated this as important, while just 15% considered it available to them), social venues and clubs (86% versus 23%), outdoor attractions and pursuits (84% versus 35%) and gym/ leisure centres (83% versus 36%).

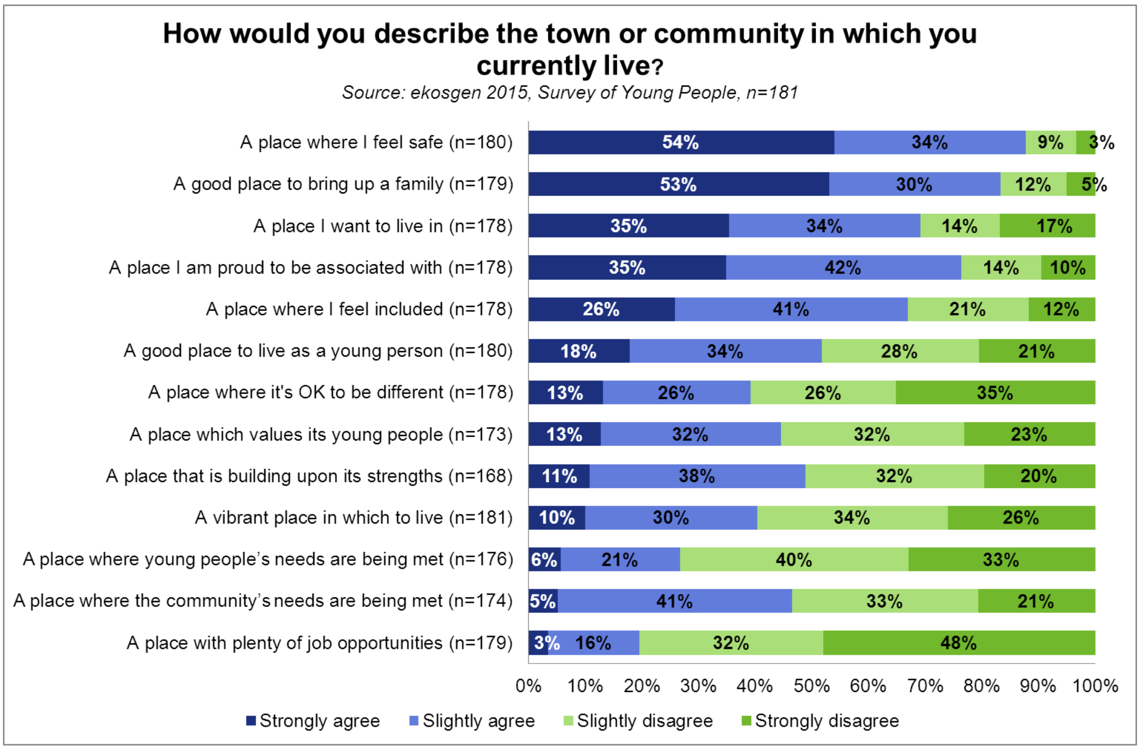
5.24 For both young people from Caithness and from Sutherland, having good access to social venues and clubs was the most important cultural offer, followed by gym/ leisure centre access and outdoor attractions and pursuits.

Community

5.25 There are some strong and positive feelings amongst young people from Caithness and Sutherland about the place in which they live. Just over three quarters are proud to be associated with their local community, marginally below the regional average of 78%. This sense of pride is slightly stronger in Caithness than it is in Sutherland.

5.26 The vast majority of young people in Caithness and Sutherland feel safe in their local community (88%) and agree that it is a good place to bring up a family (83%), both similar to the regional averages. Although two thirds (67%) feel included in their local community, marginally below that across the H&I (69%), a much lower proportion agrees that it is a place where it is OK to be different (39%), and over one third strongly disagrees with this. Within the H&I region, Caithness and Sutherland has the lowest proportion of young people who perceive their local community as a place where it is OK to be different.

Figure 5.7



5.27 Young people are well engaged with their community in Caithness and Sutherland, more so than in the H&I overall. Over half (52%) attend local community events (45% for the H&I overall), while almost four in 10 (38%) undertake volunteer work for the community (31% for the H&I) and almost as great a proportion (36%) are members of local youth groups or clubs (32% for the H&I). Less than a quarter (23%) do not participate in the community in any way, which is lower than for the H&I as a whole (29%).

5.28 However, against a number of indicators, Caithness and Sutherland is perceived more negatively by its young people than is the case for many parts of the H&I. This includes being a good place to live as a young person (52%, compared to 59% for the H&I), a place that is building upon its strengths (49%, compared to 63% for the H&I), and a place where young people's needs are being met (27%, compared to 41% for the H&I). There is little variation between those from Caithness and those from Sutherland in these perceptions.

6 Future aspirations of Young People in Caithness and Sutherland

6.1 The previous chapters have explored the education, employment, and other lifestyle factors that affect a young person's decision as to whether they stay in or leave Caithness and Sutherland. This chapter looks at the relative importance of these various factors, as well as examining the future aspirations of young people living in Caithness and Sutherland.

Making Caithness and Sutherland an Attractive Place to Live In

6.2 Employment is clearly a significant issue in Caithness and Sutherland. The top two most important themes for young people in Caithness and Sutherland are having opportunities for career progression and the availability of high quality jobs. These are rated as *very* important by 76% and 73% respectively, in making the region attractive to young people, both higher than across the H&I as a whole (64% and 68%). This varies little within Caithness and Sutherland.

6.3 Having good access to education (FE or HE) ranked as the third most important theme, rated as *very* important by two thirds of respondents (66%), higher than the H&I average of 61%. Further, having affordable transport links is very important to 62% of young people, and particularly so for those in Sutherland, where this emerged as the second most important factor in making the area more attractive.

6.4 Good access to housing is another important issue for those in Caithness and Sutherland, cited as very important by 61%, although this is marginally lower than for the H&I overall (62%). The issue is greater for those living in Caithness.

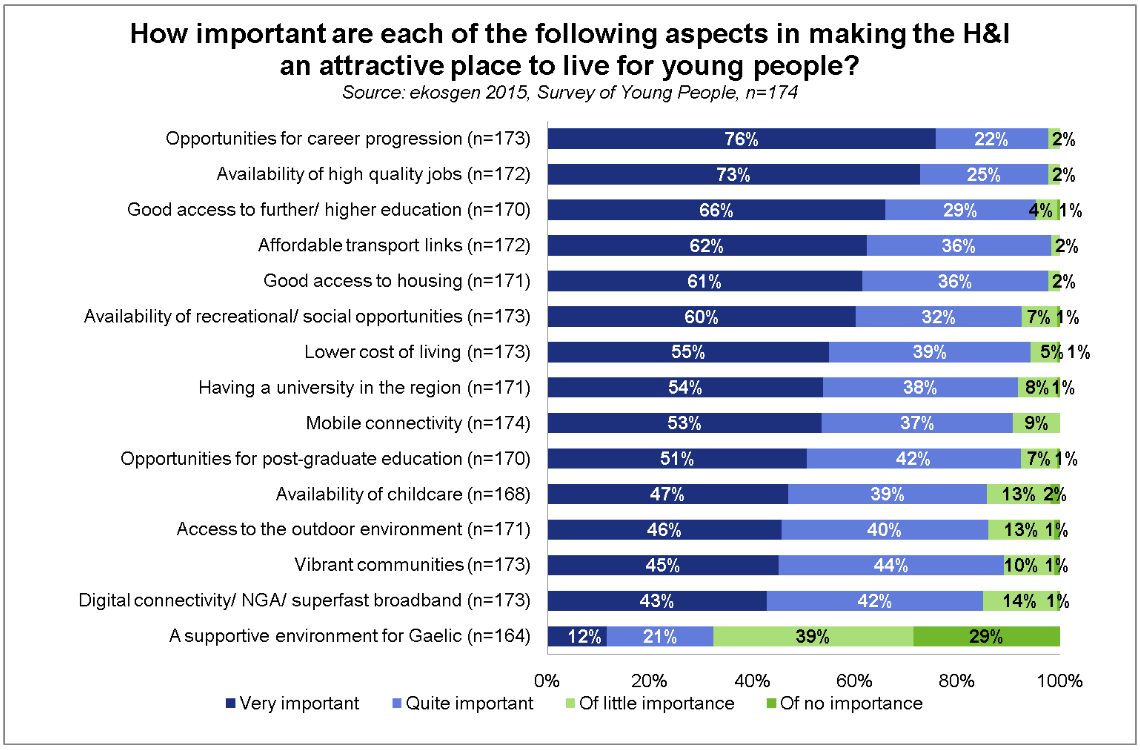
6.5 The availability of recreational or social opportunities (60%, compared to 50% for the H&I), having a university in the region (54%, compared to 48%), mobile connectivity (53%, compared to 51%) and post-graduate opportunities (51%, compared to 45%) all rank as more important in Caithness and Sutherland than in the region as a whole. The importance of living costs (55%) in making the region more attractive to live is broadly in line with the H&I overall (56%), and this is more important to young people in Sutherland.

6.6 14 of the 15 themes explored in the survey were reported as important for at least 85% of young people in Caithness and Sutherland, and very important for over four in 10 (43%). The exception is a supportive environment for Gaelic, deemed of little importance by the majority (68%) of Caithness and Sutherland respondents.

Table 6.1

Theme	% 'Very Important'	C&S Ranking	H&I Ranking
Opportunities for career progression	76	1	2
Availability of high quality jobs	73	2	1
Good access to FE/HE	66	3	4=
Affordable transport links	62	4	4=
Good access to housing	61	5	3
Availability of recreational/ social opportunities	60	6	8
Lower cost of living	55	7	6
Having a university in the region	54	8	9=
Mobile connectivity	53	9	7
Opportunities for post-graduate education	51	10	13
Availability of childcare	47	11	14
Access to the outdoor environment	46	12	9=
Vibrant communities	45	13	12
Digital connectivity	43	14	9=
A supportive environment for Gaelic	12	15	15

Figure 6.1

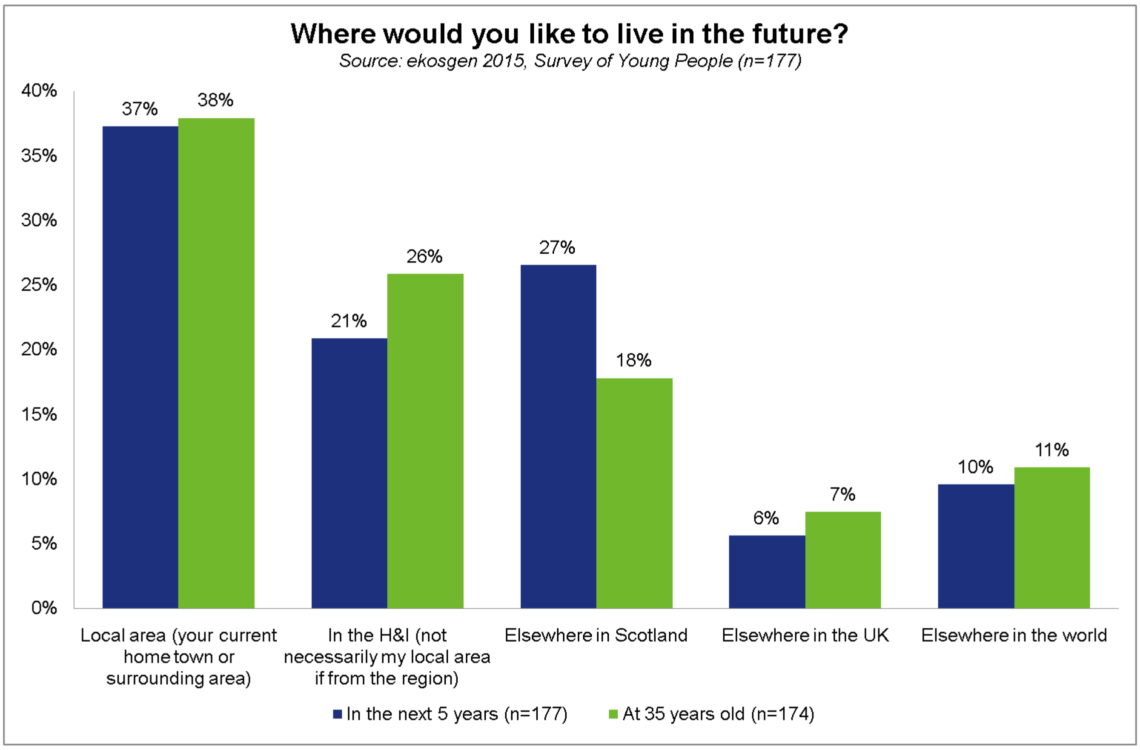


Future Aspirations

6.7 Marginally above the H&I as a whole, 37% of young people aspire to live in their local area in five years' time (36% regionally). This rises marginally to 38% at 35 years old, which is above the region's average of 33%. However, there is a clear divide within Caithness and Sutherland, with young people from Caithness more likely to want stay in their local area in the short and medium term (both 45%), compared to young people from Sutherland (26% and 30%). Within Caithness, those in Thurso (48%) are marginally more likely to want to stay in their local area in five years' time than those in Wick (43%), although this trend reverses by the age of 35.

6.8 There is a relatively high aspiration amongst young people in Caithness and Sutherland to live elsewhere in the H&I, which is likely to include Inverness given its role as the largest employment and education centre in the region. Over a fifth (21%) of young people wish to live in the H&I (outwith their local area) in five years' time, rising to over a quarter (26%) in later life, higher than the regional averages (12% and 18%).

Figure 6.2



6.9 Almost nine in 10 young people from Caithness and Sutherland either want to be in employment (55%) or studying/furthering their education (32%) in the next five years. The desire to be studying is the lowest in the region, and is particularly low in Caithness, while the desire to be in employment is above the H&I average. The aspiration to be in employment at 35 years old rises to six in 10 (60%) young people. Within Caithness, there is a higher aspiration to be in employment in Wick (64%) than Thurso (54%) in the short term, although this trend levels out in later life.

6.10 The desire to be in self-employment is higher in Caithness and Sutherland than anywhere else in the region. In all, 12% of young people wish to be running their own business in five years' time, rising to three in 10 (30%) at 35 years old, higher than the H&I averages of 8% and 24%. This shows quite a large appetite for self-employment in Caithness and Sutherland, which is prevalent throughout both sub-areas of Caithness and Sutherland.

How the H&I has changed

6.11 Just under half (48%) of young people believe the H&I to be a better place to live now than it was five years ago, below the H&I average of 51%. Almost one third (31%) were unsure, while a fifth (21%) did *not* see the region as being a better place to live now than it was five years ago – the highest proportion in the H&I after the Outer Hebrides (22%). Those in Sutherland are a lot more positive about change in the last five years than those in Caithness.

6.12 Young people in Caithness and Sutherland hold a more optimistic view about life in the H&I in the future, with over half (51%) believing the region will be a better place to live in five years' time, compared to 46% regionally. One third (33%) were unsure and 16% feel the region will not be a better place to live (14% think so regionally). Again, young people in Sutherland are more positive about the future than those in Caithness.

7 Conclusions

7.1 In all, 234 young people across Caithness and Sutherland have given their views on their local area and the H&I. This is a good evidence base of what young people are thinking in relation to a whole range of issues. Young people across Caithness and Sutherland have a strong connection to their local communities, and many want to live locally if they can, yet there are some significant constraints in terms of local opportunities to work and progress. Many look to Inverness for work and education.

Key Summary Findings

Staying and Leaving

- More than half of young people in Caithness and Sutherland see themselves as committed stayers (51%), well above the regional average of 43%. However, another 23% think they will leave reluctantly, almost twice the proportion of reluctant leaves across the H&I, linked to the perceived lack of local opportunity.

- Correspondingly, a much smaller proportion of young people in Caithness and Sutherland (22%) describe themselves as committed leavers than regionally (40%). Within the area, commitment to staying is highest in Caithness.

- Those aged 19-24 are the most likely age group to leave reluctantly, and at 31% this is well above the 12% regionally. This is even higher for University/ College students, where reluctant leavers rise to 39%. More school age pupils also say they will leave reluctantly when compared to the average for this age group elsewhere.

- Young people think other young people that stay are lucky to be able to do so, more so than regionally, especially in Sutherland. Some 86% believe others leave to access appropriate training or employment opportunities.

- Aspiration to go to university is higher in Caithness than in Sutherland, where a greater proportion wishes to undertake FE or an apprenticeship. Across Caithness and Sutherland, males are more likely to want to stay locally than females.

- Work experience, and local work placements are deemed to be important to post-school decision-making, and this is highest in Caithness. This may be seen as important to securing future employment and learning opportunities.

Education

- In all, 56% consider there to be a good educational offer, in line with the regional average. A similar proportion think they are able to study locally – again in line with the regional picture, although this is far higher in Caithness and less so in Sutherland. Across Caithness and Sutherland, half regard there to be sufficient opportunities to learn remotely (51%), but this falls to 44% in Sutherland.

- Awareness of UHI is higher than the regional average, and highest in Caithness. A greater proportion than regionally also think it to be a good place to be an under-graduate. Just over four in 10 think that UHI has a credible academic reputation, broadly in line with the average for the H&I.

- Almost two thirds (63%) would be happy to attend UHI, higher than the regional average of 57%. More are also aware of Inverness Campus, and it is viewed positively in terms of offering a city-university experience and in contributing to career aspirations and education-business research links, especially for those in Caithness.

- Overall, education is important to young people in Caithness and Sutherland – good access to FE/HE ranks as the third most important factor in making the H&I a more attractive place to live, work and study, higher than its ranking of four across the H&I as a whole.

Employment

- Around a quarter of young people in Caithness and Sutherland think local opportunities are good (24%) compared to 35% regionally. The perceived paucity of opportunity is greatest in Sutherland, although in all parts of Caithness and Sutherland opportunities are perceived to be weaker than average.

- Just 18% think there is a good range of *diverse* employment opportunities, and this is lowest in Caithness. Overall, the availability of high quality jobs is the second most important factor for young people in Caithness and Sutherland in making the H&I a more attractive place to live.

- The lack of local opportunity is reflected in poor prospects for career progression. Fewer than one in five perceive there to be good local opportunities to progress, lowest in Sutherland, and far lower than the regional average of 29%. Career progression is seen as the single most important issue in making the H&I a more attractive place to live, work and study.

- Pay levels are also perceived to be poor, and fewer think there are good pay levels than the regional average. This is most extreme in Wick.

- Opportunities for employment and progression are regarded much more favourably in parts of the H&I beyond Caithness and Sutherland. More than twice as many think there are diverse opportunities across the region than think there is good local diversity of employment.

- Just over a third would like to work locally if they could (36%), compared to 29% across the H&I. More would also like to work elsewhere in the H&I than the regional average, attributed to the ‘Inverness-effect’ which offers greater employment and education opportunities than exists locally, especially for those in Sutherland.

- The Food and drink and Sustainable tourism sectors are the most well-known to young people, although fewer than one in four are interested in working in these sectors. The Creative industries attracts the most interest, and in this case interest is equivalent to sector awareness.

- Young people want employers to provide a commitment to staff development and training and to provide options for career development, and both are valued more than the regional average. Fewer in Caithness and Sutherland value a global outlook in their employer, or one that trades internationally, suggesting a weaker appreciation of the benefits to business of trading outside Scotland.

Housing

- Although severe, housing is not considered to be as significant a factor in Caithness and Sutherland compared to the regional average. Although just 39% think there is a good choice of housing to buy, this is higher than the 26% who think this regionally. Fewer regard there to be a good choice of housing to rent (36%), closer to the regional average.

- Almost three in 10 (28%) young people in Caithness and Sutherland agree that community land ownership makes building your own home a more realistic option – in line with the regional average. A smaller proportion (26%) agree that there are sufficient opportunities to buy serviced sites for self-build, again in line with those from across the H&I.

Transport

- Transport is an issue in Caithness, and particularly in Sutherland. At 28%, bus availability is below the regional average of 40%. It is also perceived to be less affordable – just 22% rate affordability of bus services as good, compared to 34% regionally.

- Train travel is perceived to be the least available (21%) and affordable (14%) transport mode in Caithness and Sutherland, and the lowest in mainland H&I. Trains are seen as more available, but less affordable in Sutherland than Caithness

- Ferry travel is more available to those in Caithness than Sutherland, given its greater number of departure points for Orkney. Overall, less than a third think public transport provision is adequate, below the regional average of 40%. It is ranked as the fourth most important issue in making the H&I a more attractive place to live, work and study.

Digital Connectivity

- Mobile connectivity is an issue for young people in Caithness and Sutherland, and more so than broadband. Mobile coverage is rated as good by just under one in three, which is in line with the regional average. Access to 3G/4G is rated very poor by 63%, compared to the regional average of 47%.

- Broadband speed and reliability is rated good by more than the regional average, although this is still just around four in 10. Broadband is rated better by those in Caithness, whereas mobile is rated better by those in Sutherland.

Arts, Culture and Leisure

- The arts, culture and leisure offer is less available in Caithness and Sutherland, and there is a significant mismatch between perceived importance of the offer and its availability. The most available offer is the cinema (rated good by 45%), yet of the nine offers listed, this was the only one more available than the regional average.

- The greatest mismatches between availability and importance are for live music venues; social venues and clubs; and outdoor attractions and pursuits. Around eight in 10 think these offers are important, yet only between 15% and 35% think they are available.

Community

- In all, more than three in four are proud to be associated with their community, although this is marginally lower than the 78% regionally. Pride is slightly stronger in Caithness than it is in Sutherland. Young people feel safe and see it as a good place to bring up a family.

- Rates of community involvement and engagement are above the regional average, and 38% undertakes volunteering in the community. At the same time, less than four in 10 young people in Caithness and Sutherland think it OK to be different (39%), the lowest proportion in the whole of the H&I.

Future Aspirations

- In all, 37% wish to be living in their local area in five years' time, in line with the regional average. A greater proportion, 38%, wishes to be living locally aged 35, above the H&I average of 33%. More wish to live elsewhere in the H&I than the regional average – attributed to the Inverness effect.

- On average, a greater proportion wishes to be in employment in the future than regionally, and a lower proportion in education. More are also seeking self-employment in Caithness and Sutherland, rising to 30% by the age of 35.

- Almost half the young people in Caithness and Sutherland believe the H&I to be a better place than five years ago, although this is below the regional average. Young people are however, more than averagely optimistic about the future.

Concluding Remarks

7.2 Young people in Caithness and Sutherland are proud of their local community and more wish to stay locally than is the case across the region as a whole. There is, however, a significant mismatch between the availability of opportunities, both for education and employment, and the desire to work, study and live locally. Caithness and Sutherland has the highest proportion of reluctant leavers in the H&I, and this is indicative of a desire to stay but a perceived inability to do so. The lack of career progression opportunities is a real issue for young people.

7.3 There are some additional barriers to staying in Caithness and Sutherland, notably transport, particularly in Sutherland. In relative terms however, the cost of living, housing and digital connectivity are no more acute problems in Caithness and Sutherland than regionally. There is a weak arts, leisure and culture offer on the whole, and there is an expectation for many that they will leave Caithness and Sutherland, with higher proportions hoping to go elsewhere in the H&I.

7.4 Despite the higher than average proportion of reluctant leavers, a high proportion regard themselves as committed stayers, which is a positive base on which to build. There is a need to continue to make local employment and education opportunities available, and to help young people realise self-employment aspirations. There is also a need to counter cultural norms about difference, and to help young people see the advantages of a more outward-facing view of the world, including in their choice of employer.

A. Annex 1: survey response profile

This chapter provides an overview of survey respondents by age, gender, geography and status.

Number of Respondents

In all, 234 young people from Caithness and Sutherland responded to the survey (either online or through a paper version). This represents just over 5% of the total survey sample and a strong confidence level of 95% with a +/-6.3% margin of error, based on an estimated 15-30 year old Caithness and Sutherland population of 6,608.[31] This provides a robust survey sample and high reliability in the findings.[32]

Age

Overall, 71 (30%) of respondents were aged 15-18 years at the time of the survey, 92 (39%) of those responding were aged 19-24 years, and a further 71 (30%) were aged 25-30 years at the time of completing the survey. Again, this provides a robust confidence level of at least 95% with a margin of error between +/-11% and +/-12%.

Overall responses are relatively representative by age group, when compared to the distribution of the total population. In comparison to other H&I areas, there is a slightly higher representation of those aged 19-24 years as a result of the proportionally lower response rate amongst school pupils in Caithness and Sutherland.

Table A.1.1: Caithness and Sutherland Survey Response by Age and Representativeness

Age group	Total (survey)		Caithness and Sutherland		Difference (+/-?)
	Number	Percentage	Number	Percentage	
15-18	71	30%	**1,965**	**30%**	**0%**
19-24	92	39%	**2,235**	**34%**	**+5%**
25-30	71	30%	**2,408**	**36%**	**-6%**
Total	**234**	**99%**	**6,608**	**100%**	**N/A**

Source: ekosgen, 2015, Survey of Young People; Census, 2011. Percentages may not sum due to rounding.

Gender

In all, 72% of respondents from Caithness and Sutherland (167) were female, compared to 48% across the region. A total of 63 were male (27%), compared to 52% across the area. Two respondents (1%) preferred not to say.[33]

For both males and females, this again provides a high level of confidence at 95%, with a +/-8% margin of error for females, and a +/-12.5% margin of error for males.[34]

[31] Census (2011) – area office breakdown provided by Highlands and Islands Enterprise.

[32] Please note that a small proportion of young people did not provide answers to all socio-demographic questions. So, while these young people are included in the overall responses, it was not possible to attribute them to age groups; thus, not all of the categories sum to the full 234 responses received.

[33] *National Register of Scotland Mid-year Population Estimates (2013)*

[34] *National Register of Scotland Mid-year Population Estimates (2013)*

Geography

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. Within Caithness and Sutherland, more than half of respondents were from Caithness (129 – 56%), and just over two fifths (100 – 44%) were from Sutherland.[35]

Status

Nearly half (47%) of respondents were in employment or self-employment at the time of responding (109 individuals). One in four respondents (25% - 57) were university/college students and one fifth (20% - 46) were school pupils.

Small numbers responding to the survey were undertaking an apprenticeship (11), had finished education, but were not currently in employment or unemployed (four), or were a carer or home maker (three), respectively representing 5%, 2% and 1% of respondents. No respondents from Caithness and Sutherland were unemployed.

In comparison to the wider sample, respondents from Caithness and Sutherland are more commonly in employment or self-employment, and are less likely to fall within any of the other categories.

Summary

In all, a good number of responses were received from young people in Caithness and Sutherland, and across the area's sub-areas. These responses provide good confidence in the results by age, geography and gender, providing a robust data-set for analysis.

[35] Please note, this is based on the respondents' postcode. There were 5 individuals that it was not possible to determine the sub-area for.

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