

MY LIFE IN THE HIGHLANDS AND ISLANDS RESEARCH

Lochaber, Skye and Wester Ross

Summary report

October 2022



Highlands and Islands Enterprise
Iomairt na Gàidhealtachd 's nan Eilean

EXECUTIVE SUMMARY – LOCHABER, SKYE AND WESTER ROSS

This report presents the findings of a large-scale survey conducted by Ipsos on behalf of Highlands and Islands Enterprise (HIE), between 28th January and 25th March 2022. In total, 5,301 adults aged 16+ living in the Highlands and Islands responded to the survey, including 419 in Lochaber, Skye and Wester Ross.

Connectivity and access to services

Households in Lochaber, Skye and Wester Ross are less likely than those in the region overall to be able to access a primary school (68% can), convenience store (65%), daytime bus service (64%), post office (62%), secondary school (36%), residential care (35%), supermarket (31%), recycling centre (30%), evening bus service (24%) and cottage/community hospital (22%) within a 15-20 minute walk.

Households in Lochaber, Skye and Wester Ross are more likely than average to face challenges in accessing health services. Of those who know about service availability, more than regionally say they are unable to access mental health services (33%), a dentist (29%), physiotherapist (20%), or home care services (11%) within a 20-minute drive or online.

22% of households in Lochaber, Skye and Wester Ross say they would find it difficult to stream a TV programme or film online without pauses or buffering.

Housing

Most households in Lochaber, Skye and Wester Ross feel their own housing situation meets their needs, though more than half (55%) feel their home is expensive to heat. Compared to the region overall, households in the area are more likely to perceive a range of housing challenges in their local area including a shortage of housing generally (90%) and of the right types of housing (86%), that local people can't afford to buy housing (90%), and that too many houses are bought as second homes (85%) or used for short-term holiday rents (81%).

Employment and training

Residents in Lochaber, Skye and Wester Ross are more likely than those across the region overall to have more than one job (20% vs 13%) and to be self-employed (29% vs 19%). 14% would like to start their own business (12% overall). Those who have not accessed training in Lochaber, Skye and Wester Ross are more likely than average to find it difficult to do so in person (44% vs 30%), with time away from home the main barrier. One in ten say they would find it hard to access training online.

Impact of Covid-19 and transport

90% of households in Lochaber, Skye and Wester Ross say goods and services are more expensive in their local area now than they were before the pandemic. Residents are more likely than average to say it has been more difficult to get tradespeople and goods and services since the pandemic, that increased numbers of tourists have made it hard for local people to access ferry or air services and that more people have moved to the area because they can work from home.

The vast majority of residents (94%) in Lochaber, Skye and Wester Ross rely on a car or van, higher than the region overall at 87%.

Participation, pride and local decision making

Residents in Lochaber, Skye and Wester Ross are more likely than those across the region overall to take part in activities in their local community (66% vs 55%), most commonly local community events, membership of local groups or sports clubs, and volunteering.

93% of residents take pride in living in Lochaber, Skye and Wester Ross, higher than the region overall (88%), but they are split about whether local people are able to influence decision-making.

Towards net zero

38% of households are planning to make energy efficiency improvements in the next two to three years (in line with the region overall), most commonly installing a smart meter (19%) or a new boiler/heating system (12%).

48% of those in work in Lochaber, Skye and Wester Ross believe their job will be affected by the move towards net zero, in line with the region overall.

Priorities for communities to thrive

More than half of residents (55%) are optimistic about their community (52% regionally). The top priorities for communities in Lochaber, Skye and Wester Ross to thrive are: housing for local families (66%), more job opportunities (32%) and more working age people moving to the area (25%). Housing and more working age people are higher than average priorities for residents than regionally.

ACCESS TO FACILITIES AND SERVICES (1)

Most households in Lochaber, Skye and Wester Ross have a hall/function room (68%), primary school (68%), convenience store (65%), daytime bus service (64%) and a post office (62%) available within a 15-20 minute walk. However, local access to other key services and facilities explored is more limited, and generally lower than the regional average. For example, 76% do not have a cottage/community hospital available locally and more than 6 in 10 do not have a supermarket (68%), recycling centre (66%), evening bus service (61%) or secondary school (61%) within a 15-20 minute walk of their home.

22%

OF HOUSEHOLDS SAY IT IS DIFFICULT TO STREAM A TV PROGRAMME OR FILM similar to the region overall (21%)

34%

OF HOUSEHOLDS SAY IT IS DIFFICULT TO TAKE OUT MONEY FROM A CASH MACHINE higher than the region overall (28%)

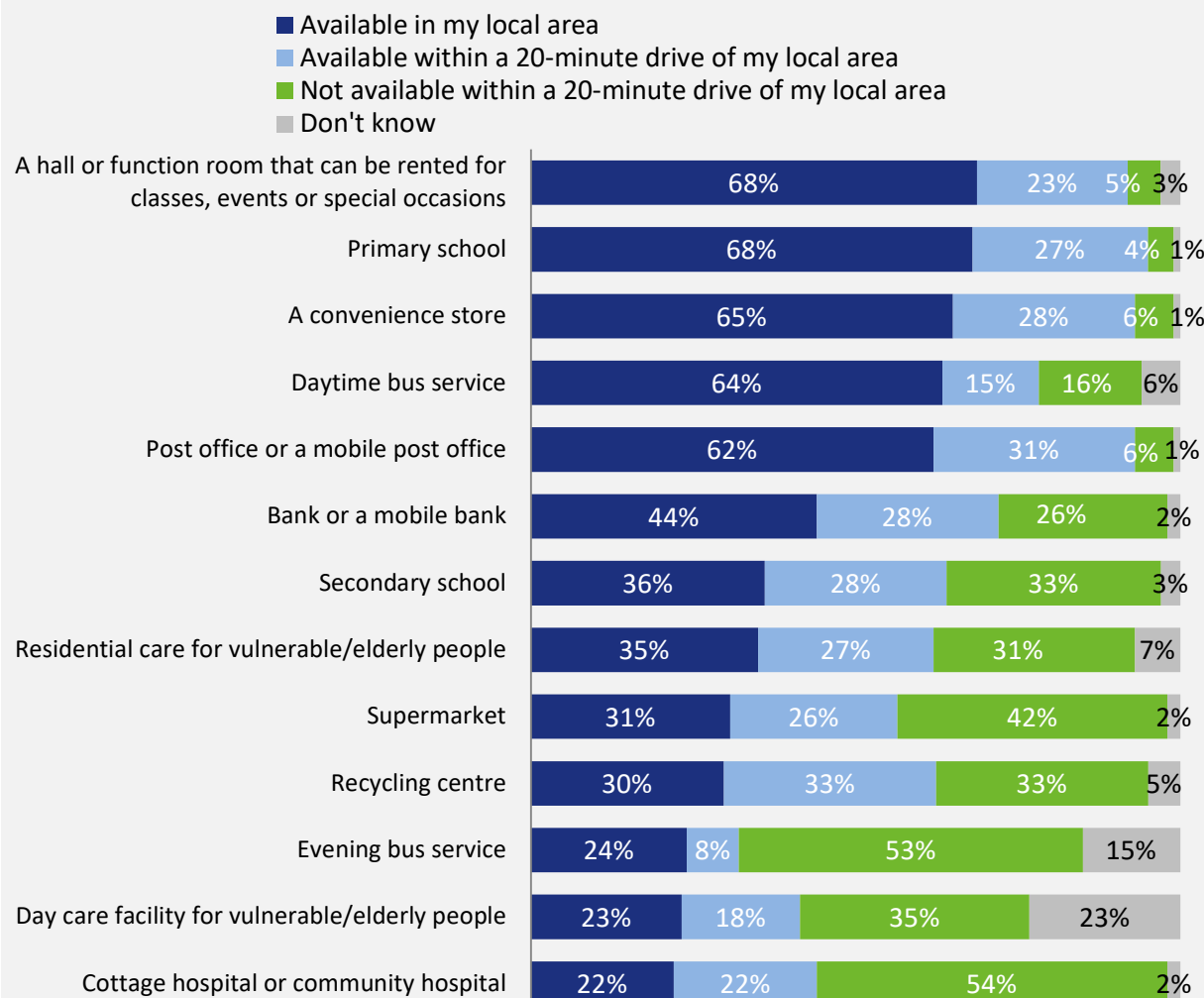
72%

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

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

- a **primary school** (68% vs 77%)
- a **secondary school** (36% vs 51%)
- a **post/mobile post office** (62% vs 68%)
- a **cottage/community hospital** (22% vs 35%)
- **residential care** (35% vs 43%)
- a **convenience store** (65% vs 74%)
- a **supermarket** (31% vs 47%)
- a **daytime bus service** (64% vs 77%)
- an **evening bus service** (24% vs 43%)
- a **recycling centre** (30% vs 41%)

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



Base: All households in Lochaber, Skye and Wester Ross (347); fieldwork = 28 January – 25 March 2022

ACCESS TO FACILITIES AND SERVICES (2)

Households in Lochaber, Skye and Wester Ross are more likely to face challenges in accessing health services compared to the region overall. Most households have access to a GP (79%) permanently located within a 20-minute drive of their local area, and around half have a dentist (52%) within this distance. Fewer say they can access home care services, physiotherapist or mental health services in person, although more than three in ten don't know about local access to these services.

Excluding those who don't know whether each is available locally, households in Lochaber, Skye and Wester Ross are more likely than those across the region overall to say they **are unable to access mental health services (33% vs 20%), a dentist (29% vs 15%), physiotherapist (20% vs 11%), or home care services (11% vs 6%)** either within a 20-minute drive or online.

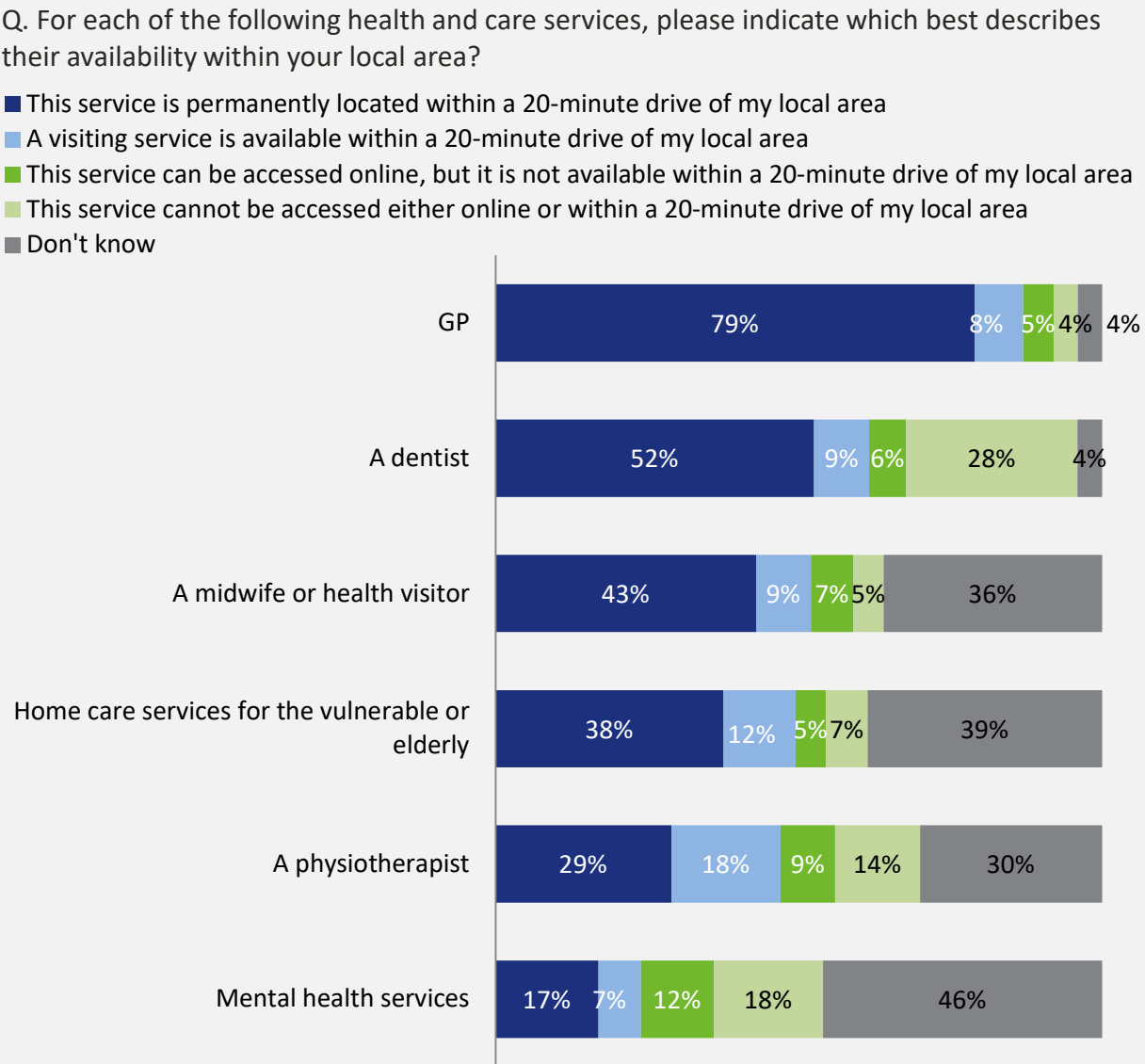
Proportions unable to access a **GP (5% vs 3%)** and a **midwife or health visitor (8% vs 5%)** are in line with regionally.

Reliance on and satisfaction with transport services

The vast majority of households in Lochaber, Skye and Wester Ross own at least one vehicle (94%), with 48% owning two or more cars, similar to the region overall (87% and 44% respectively).

- 94% rely on a car or van, higher than in the region overall at 87%
- 19% rely on ferries, similar to the region overall at 23%
- 15% rely on buses, lower than in the region overall at 20%
- 11% rely on trains, similar to the region overall at 12%
- 8% rely on air transport, lower than in the region overall at 17%.

Levels of satisfaction with bus reliability are higher than in the region overall (61% satisfied vs 52%).



Base: All households in Lochaber, Skye and Wester Ross (347); fieldwork = 28 January – 25 March 2022

HOUSING SITUATION

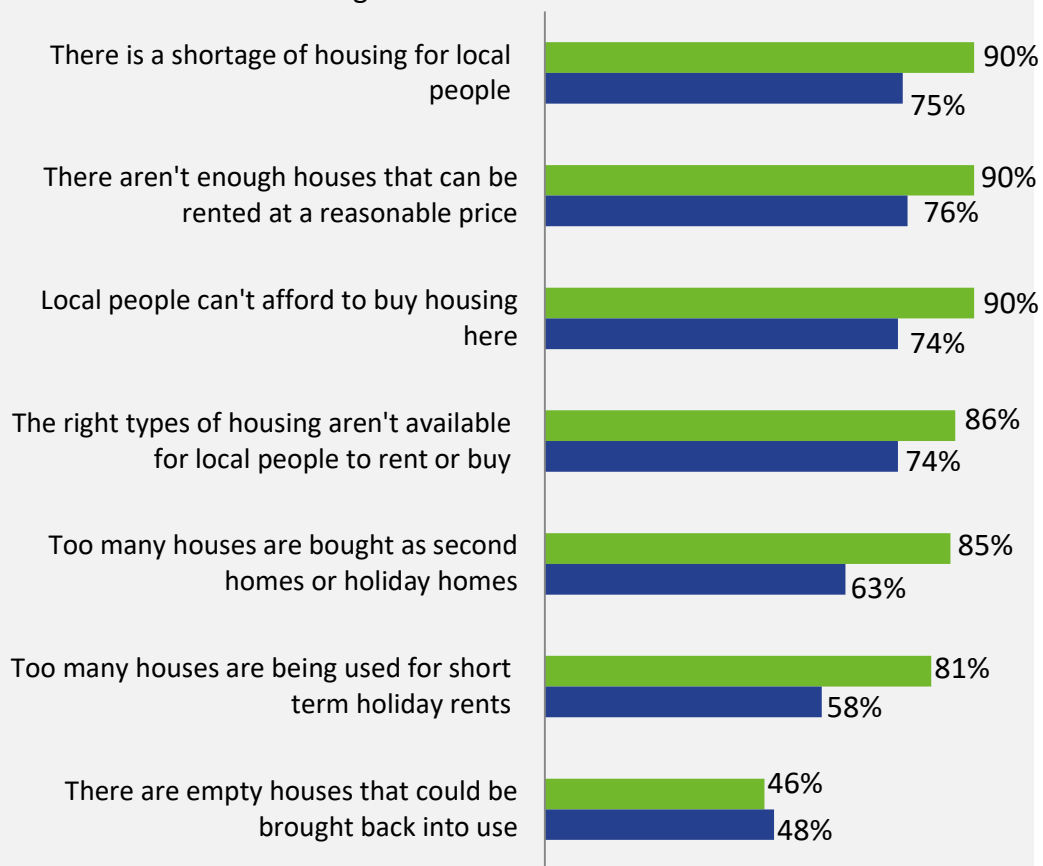
Most households in Lochaber, Skye and Wester Ross (89%) say their housing situation meets their needs well (90% regionally). However, more than half (55%) say their home is expensive to heat and 20% that it is difficult to heat. More households than overall say their property is in poor condition (11% vs 7%). Households in Lochaber, Skye and Wester Ross are more likely than those in the region overall to say that there is a shortage of housing, there aren't enough houses that can be rented at a reasonable price, local people can't afford to buy housing, the right types of housing aren't available, and too many houses are bought as second homes or are being used for short-term holiday rents.

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

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

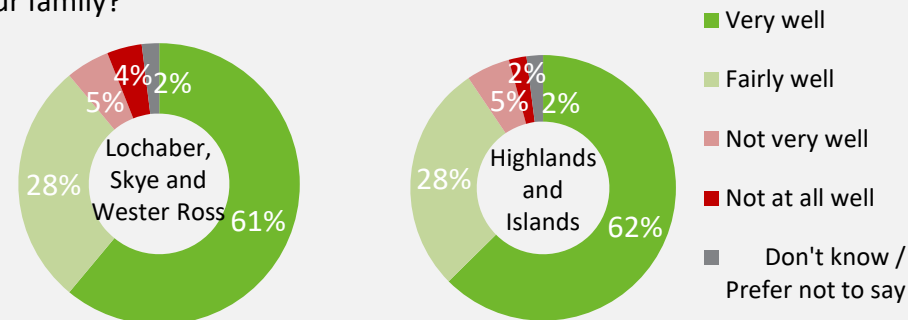
■ Lochaber, Skye and Wester Ross

■ Highlands and Islands



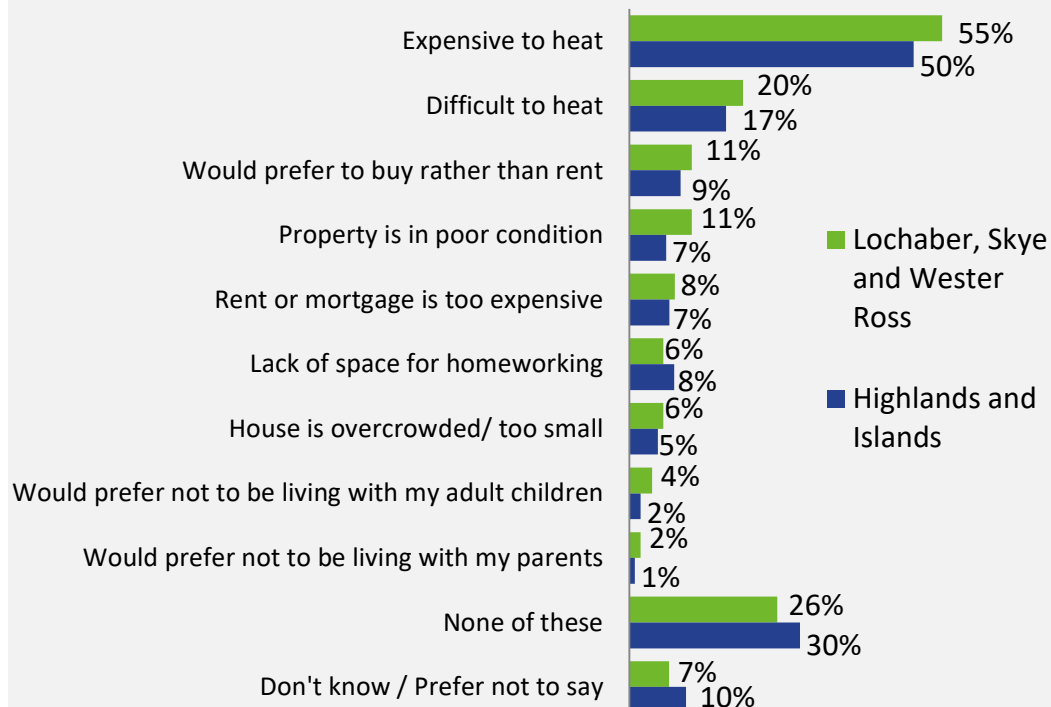
Base: All households in Lochaber, Skye and Wester Ross (347) and the Highlands and Islands (4,442); fieldwork = 28 January - 25 March 2022

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



Base: All households in Lochaber, Skye and Wester Ross (347) and the Highlands and Islands (4,442); fieldwork = 28 January - 25 March 2022

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



Base: All households in Lochaber, Skye and Wester Ross (347) and the Highlands and Islands (4,442); fieldwork = 28 January - 25 March 2022

EMPLOYMENT, ENTREPRENEURSHIP AND TRAINING

Those in work in Lochaber, Skye and Wester Ross are more likely than regionally to have more than one job (20%) and to be self-employed (29%). Those aged 65+ in the area are also more likely than average to still be in work. 62% of those in work in Lochaber, Skye and Wester Ross are happy in their current job and 37% feel they have opportunities to develop their skills. However, those who have not accessed training are more likely than average to find it difficult to do so in person.

54% work in the private sector

(similar to the region overall at 49%)

33% work in the public sector

(lower than the region overall at 42%)

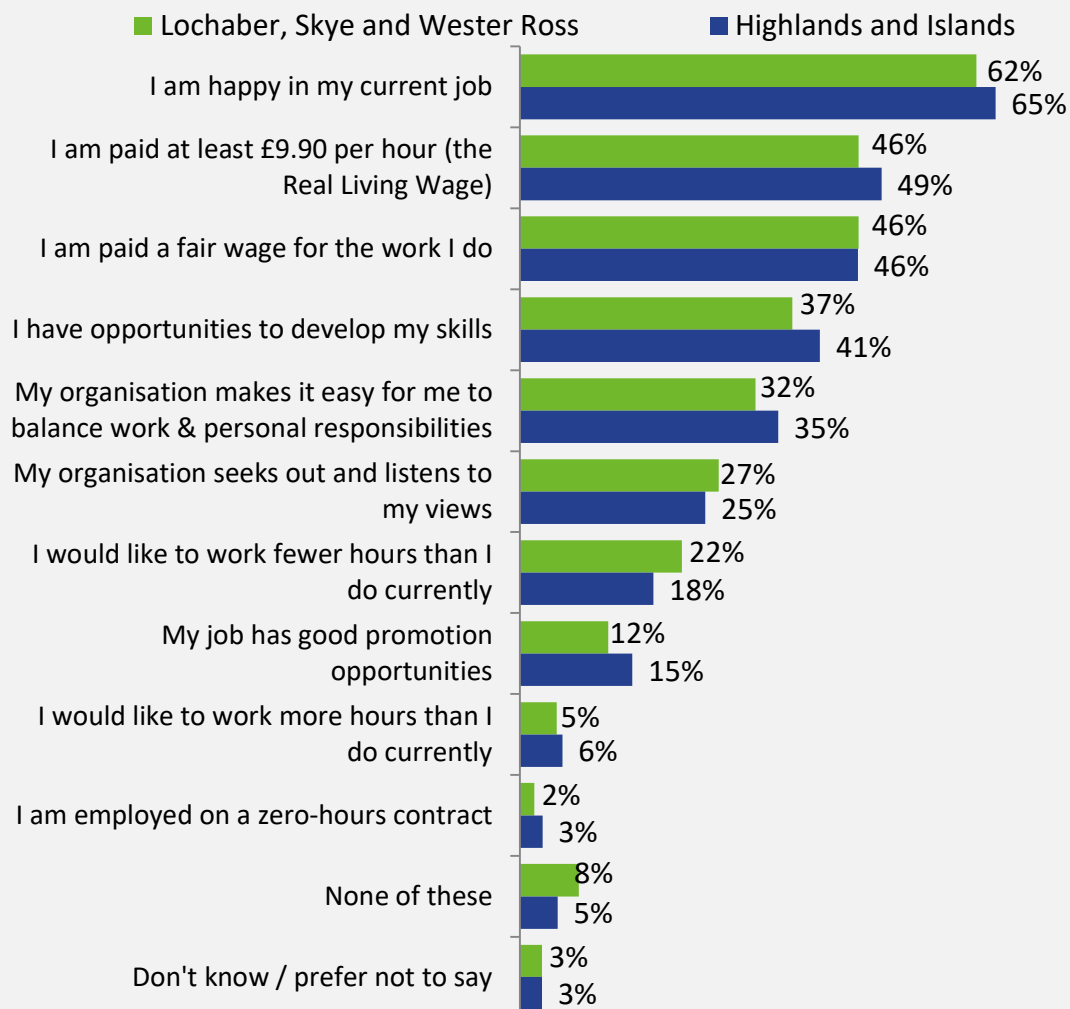
10% work for a charity/voluntary organisation

(higher than the region overall at 6%)

29% are self-employed

(higher than the region overall at 19%)

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



Base: All in work, aged 16+ in Lochaber, Skye and Wester Ross (198) and in the Highlands and Islands (2,240); fieldwork = 28 January - 25 March 2022

20% of those in work have more than one job, higher than the region overall at 13%.

21% of those aged 65+ are still in work, higher than regionally (13%).

Work aspirations are in line with the region overall.

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



Base: All who are employees, looking for work or studying, aged 16+ in Lochaber, Skye and Wester Ross (144) and the Highlands and Islands (2,031); fieldwork = 28 January - 25 March 2022

48% of those in work say that their job would be affected by the need to reduce carbon emissions, in line with the region overall (46%).

44% of Lochaber, Skye and Wester Ross residents who have not accessed training say they would find it difficult to do so in person, higher than the region overall (30%). The main barrier to accessing training is having to spend time away from home (36%). **10%** say they would find it difficult to access training online, similar to the region overall (9%).

Residents in Lochaber, Skye and Wester Ross are **less likely to feel that the training opportunities available locally allow young people to stay in the area** (51% disagree vs 37% regionally).

IMPACT OF COVID-19 ON ACCESSING GOODS AND SERVICES

There is consensus among residents of Lochaber, Skye and Wester Ross that it is more expensive to buy goods and services now than it was pre-pandemic: 90% say this is the case in their local area, in line with the region overall. Residents are more likely to say it has been more difficult to get tradespeople and goods and services since the pandemic, that increased numbers of tourists have made it hard for local people to access ferry or air services, and that more people have been moving to the area because they can work from home. Fewer people than regionally say that businesses that closed because of lockdown haven't reopened.



90% say it is more expensive to buy goods and services now than it was before the pandemic, similar to the region overall (89%).



68% say people are supporting local businesses more than they used to, similar to the region overall (67%).



74% say community events have been cancelled and haven't restarted, similar to the region overall (72%).



50% of households say increased numbers of tourists have made it hard for local people to access ferry or air services, higher than the region overall (34%).



74% say it has been more difficult for households in Lochaber, Skye and Wester Ross to get tradespeople to do work around residents' houses, higher than the region overall (67%).



52% say people have been moving to live here because they can work from home, higher than the region overall (45%).



68% of households say it is more difficult to get hold of goods needed now than it was before the pandemic, higher than the region overall (61%).



45% say businesses that closed because of lockdown haven't reopened, lower than the region overall (56%).

PARTICIPATION, PRIDE AND LOCAL DECISION MAKING

Two-thirds of residents in Lochaber, Skye and Wester Ross (66%) report taking part in activities in their local community, higher than the region overall at 55%. Most commonly these are: attending local community events, membership of local groups or sports clubs or volunteering for a charity, social enterprise or community group.

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

Participation



49%

ATTEND LOCAL COMMUNITY EVENTS
higher than the region overall



27%

ARE MEMBERS OF LOCAL GROUPS OR
SPORTS CLUBS



26%

VOLUNTEER
higher than the region overall



15%

ARE BOARD MEMBERS
higher than the region overall

Pride

93%

ARE PROUD TO LIVE IN LOCHABER, SKYE
AND WESTER ROSS higher than the region
overall at 88%

Local decision making



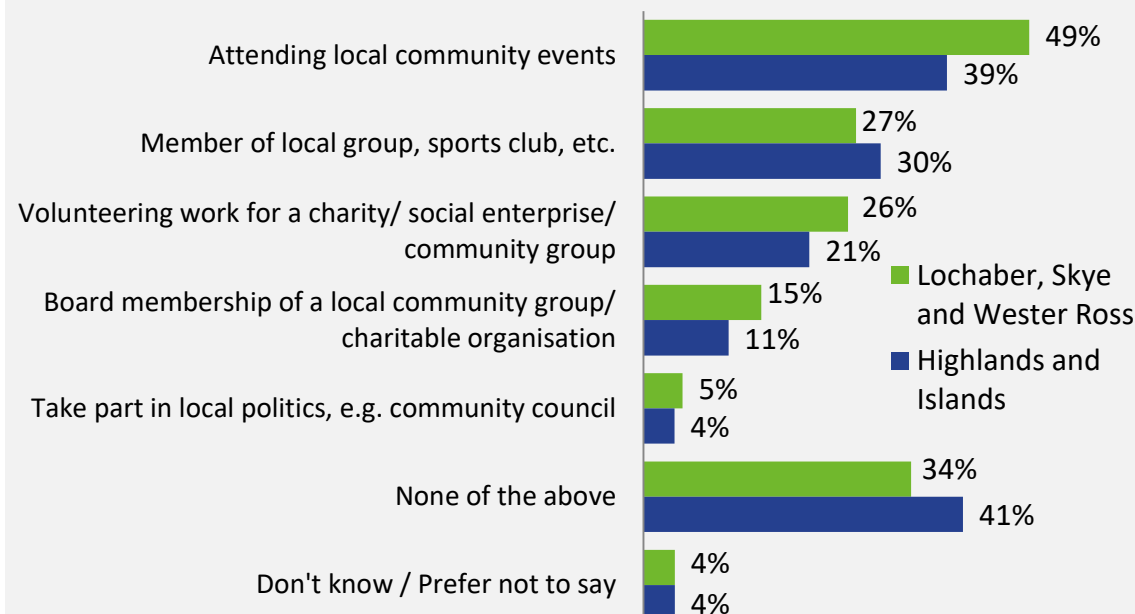
34%

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

32%

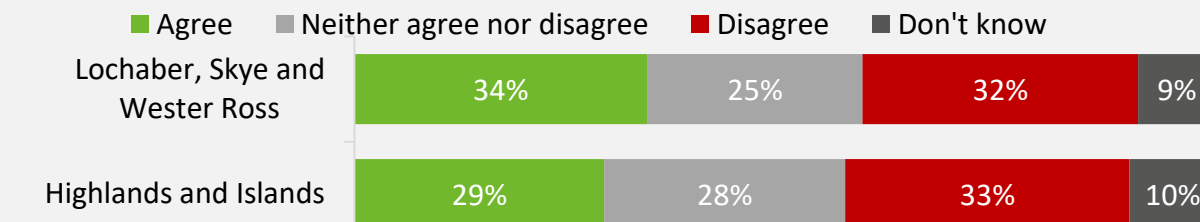
DISAGREE

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



Base: All residents, aged 16+ in Lochaber, Skye and Wester Ross (419) and the Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

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



Base: All residents, aged 16+ in Lochaber, Skye and Wester Ross (419) and the Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

TOWARDS NET ZERO – ENERGY SOURCES AND ELECTRIC VEHICLES

The most commonly used energy sources for heating homes in Lochaber, Skye and Wester Ross are electricity, oil and wood/biomass, with the use of each of these higher than in the region overall (access to the gas grid is limited in the area). Air source heat pumps are the most used green technology for home heating, in line with the region overall. Reflecting the regional picture, very few currently have, or are planning to buy or lease an electric car. A higher proportion than average have not even considered buying or leasing an electric or hybrid car.



Dwelling types

Households in Lochaber, Skye and Wester Ross are most likely to live in a detached (52%) or semi-detached house (24%). More households live in a house with a working croft (6%) compared to the average across the region overall (3%).



Electric cars

6% of households in Lochaber, Skye and Wester Ross own or lease an electric or hybrid car and 6% plan to buy or lease one, both in line with the region overall (7% and 6%). Just over a quarter (26%) have thought about buying or leasing an electric/hybrid car and decided against it, and 22% have not yet made a decision (26% and 24% regionally). A quarter (26%) say they haven't thought about owning or leasing one at all, compared to 20% across the region.

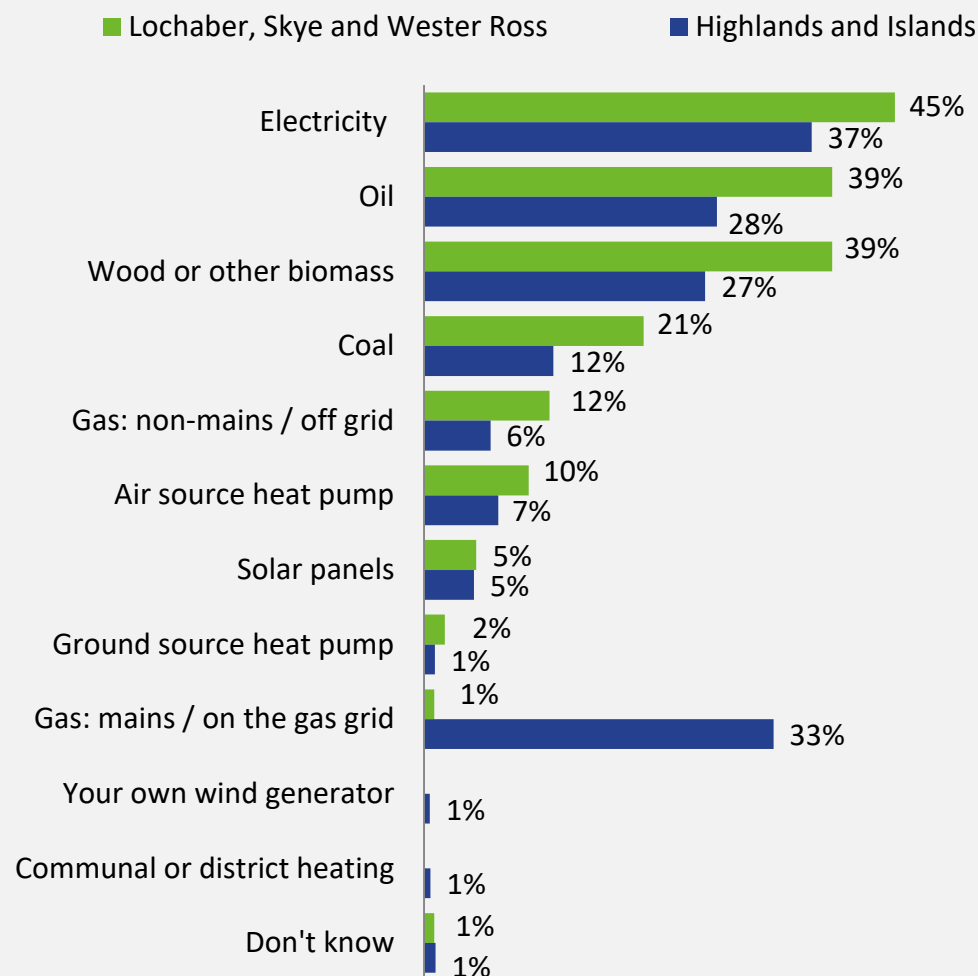
Consistent with the region overall, cost (83%), range (84%) and availability of public charging points (79%) are key concerns in relation to buying or leasing an electric or hybrid car (85%, 80% and 76% respectively regionally).

56% of households would find it difficult to charge an electric vehicle on the street or at a car park, similar to the region overall at 57%.

NOTES

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

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



Base: All households in Lochaber, Skye and Wester Ross (347) and the Highlands and Islands (4,442); fieldwork = 28 January - 25 March 2022

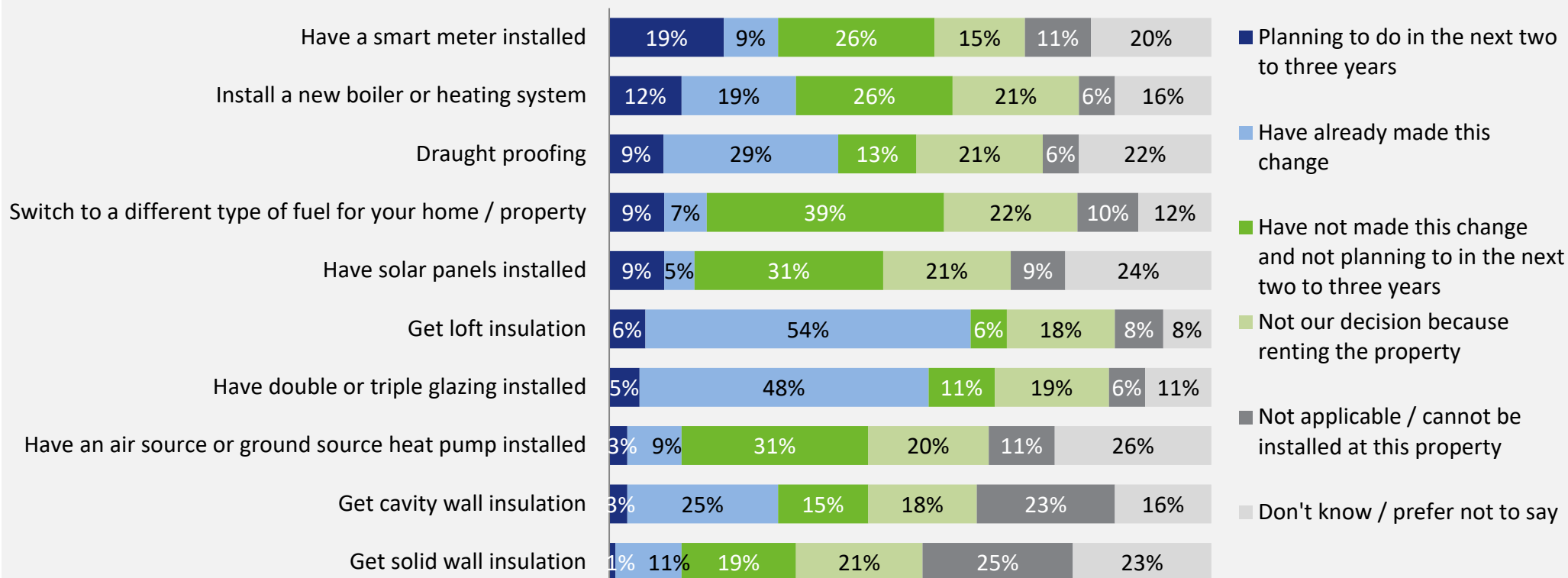
TOWARDS NET ZERO – ENERGY EFFICIENCY IMPROVEMENTS

Households in Lochaber, Skye and Wester Ross are just as likely as those in the region overall to be planning energy efficiency improvements. The most commonly planned actions are installing a smart meter (19%) and a new boiler or heating system (12%).

The main reasons households in Lochaber, Skye and Wester Ross are unlikely to change the type of fuel used in their property in the next two to three years are: it is too expensive (57%), they don't want to (31%) and not enough financial support is available (24%).

38% OF HOUSEHOLDS ARE PLANNING TO MAKE AT LEAST ONE ENERGY EFFICIENCY IMPROVEMENT IN THE NEXT TWO TO THREE YEARS, SIMILAR TO THE REGION OVERALL AT 36%.

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



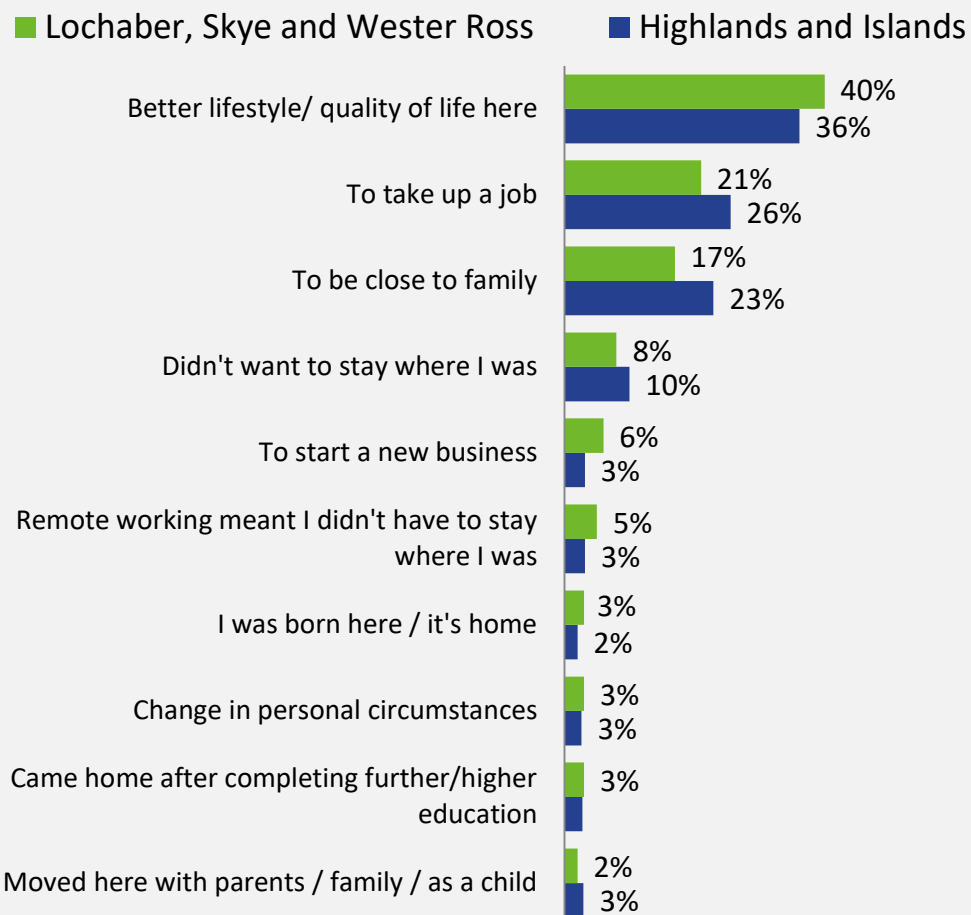
Base: All households in Lochaber, Skye and Wester Ross (347); fieldwork = 28 January - 25 March 2022

POPULATION MOVEMENT AND MIGRATION TO THE AREA

Among residents in Lochaber, Skye and Wester Ross who have not always lived in the Highlands and Islands, the main reason for moving to the region was for a better quality of life.

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

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



Base: All residents who have not always lived in the Highlands and Islands, aged 16+ in Lochaber, Skye and Wester Ross (330) and the Highlands and Islands (3,449); fieldwork = 28 January - 25 March 2022

Among those in Lochaber, Skye and Wester Ross who have not always lived in the region:



40% say they moved to the region for a better lifestyle/quality of life, similar to the region overall



21% moved to take up a job, similar to the region overall

Among all households in Lochaber, Skye and Wester Ross:

67% say most of the people who move to their local area are retired, higher than the region overall at 56%

64% say people are leaving their local area because they can't find work, higher than the region overall at 47%

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

27% say more people are moving to their local area for new job opportunities, similar to the region overall at 29%

PRIORITIES FOR COMMUNITIES TO THRIVE

The top priorities for communities in Lochaber, Skye and Wester Ross to thrive are: housing for local families, more job opportunities and more working age people moving into the area. Housing and more working age people are higher priorities for residents of Lochaber, Skye and Wester Ross residents than regionally.

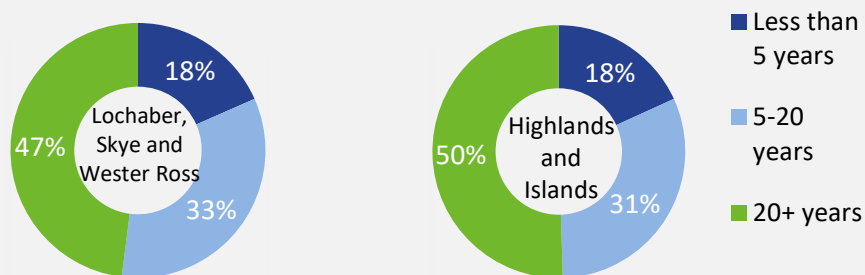
Optimism

55% of Lochaber, Skye and Wester Ross residents are optimistic about their community while 15% are pessimistic, similar to the region overall (52% and 16% respectively).

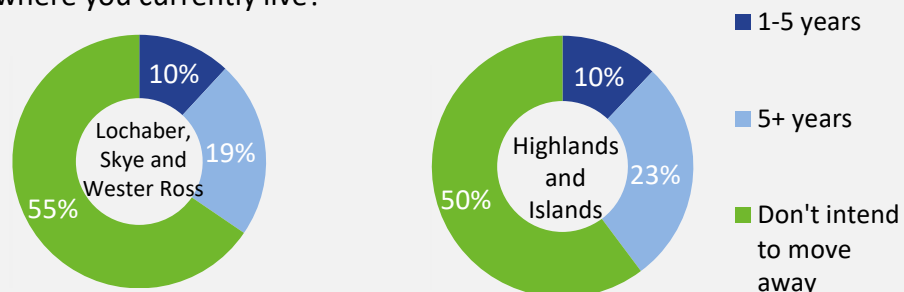
Length of residence and future intentions

47% of residents of Lochaber, Skye and Wester Ross have been living in their local area for more than 20 years. 33% have lived there for between 5 and 20 years. 18% have lived there for less than five years, in line with the regional average. In terms of future intentions, 55% of residents don't intend ever to move away from their local area, similar to the region overall at 50%.

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



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

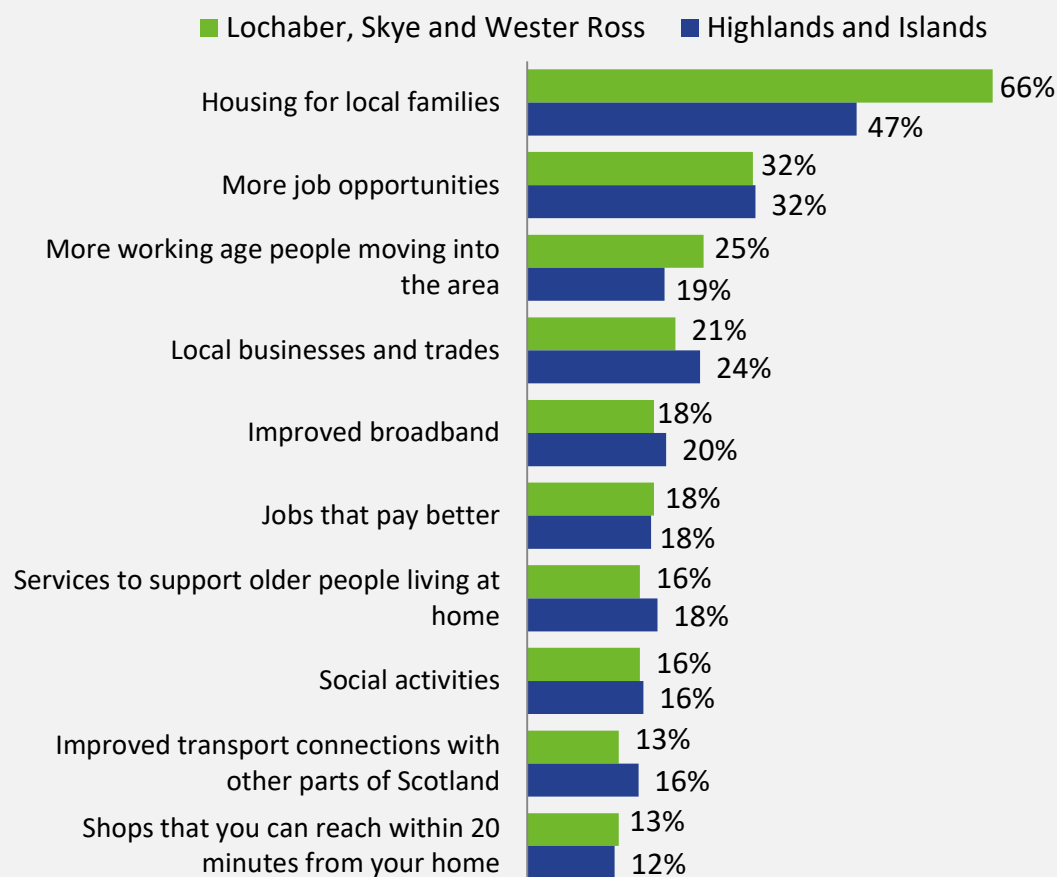


Base: All residents, aged 16+ in Lochaber, Skye and Wester Ross (419) and the Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

Priorities

Housing for local families (66%) and more working age people moving into the area (25%) are higher priorities for communities in Lochaber, Skye and Wester Ross, compared to those in the region overall (47% and 19%).

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



Base: All residents, aged 16+ in Lochaber, Skye and Wester Ross (419) and the Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

METHODOLOGY

Sampling

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

Method

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

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

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

Fieldwork

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

In Lochaber, Skye and Wester Ross 419 interviews were achieved.

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



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Iomairt na Gàidhealtachd 's nan Eilean