MY LIFE IN THE HIGHLANDS AND ISLANDS RESEARCH

Caithness and Sutherland

Summary report

October 2022

Highlands and Islands Enterprise
Iomairt na Gàidhealtachd 's nan Eilean

EXECUTIVE SUMMARY – CAITHNESS AND SUTHERLAND

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. 5,301 adults aged 16+ living in the Highlands and Islands of Scotland responded to the survey, including 455 in Caithness and Sutherland.

Connectivity and access to services

Most households in Caithness and Sutherland have a primary school (79%), a rentable hall/function room (72%), convenience store (72%), post office (71%) or daytime bus service (69%) available within a 15-20 minute walk. However, some need to travel further to access other key services. For example, just under a third (31%) cannot access a cottage/community hospital within a 20-minute drive and 22% cannot access a supermarket within this distance.

Relative to the Highlands and Islands region overall, households in Caithness and Sutherland are less likely to say they can access daytime bus services (69% vs 77%) or evening bus services (23% vs 43%) within their local area.

Excluding those who don't know about service availability, over a third (34%) cannot access mental health services either within a 20-minute drive or online, higher than in the region overall (20%).

Households in Caithness and Sutherland are more likely than regionally to find it difficult to have a takeaway delivered (55%), take out money from a cash machine (38%) or stream a TV programme/film online (32%).

Housing

Most households feel their housing situation suits their needs well. Compared to the Highlands and Islands overall, households in Caithness and Sutherland are less likely to say there is a shortage of housing for locals (69% say this), that people can't afford housing (67%), a lack of the right types of properties for local people (65%) or there aren't enough properties to rent at a reasonable price (65%). However, around two thirds do still agree with each of these statements.

Employment and training

10% of those in work in Caithness and Sutherland have more than one job, 17% are self-employed and 10% would like to start their own business (compared with 13%, 19% and 12% regionally). Residents who have not accessed training are more likely than those in the region overall to say they find it hard to do so in person in their local area (40% vs 30%).

Impact of Covid-19 and transport

The pandemic has impacted on people's access to goods and services in Caithness and Sutherland: 88% say goods and services are more expensive in their local area now than they were before the pandemic, and 73% find it more difficult to get tradespeople to do work (higher than across the region).

Reliance on different modes of transport is broadly in line with the region overall, although fewer in Caithness and Sutherland rely on buses and ferries. Levels of dissatisfaction with the frequency and reliability of air services, buses and trains are higher amongst those in Caithness and Sutherland than regionally.

Participation, pride and local decision making

Just over half of residents take part in activities in their local community, most commonly attending local events, local groups or sports clubs, or volunteering.

86% express pride in their local community (88% regionally). However, 46% disagree that they can influence local decision making (33% do so regionally).

Towards net zero

37% of households are planning to make energy efficiency improvements in the next two to three years, most commonly installing a smart meter (18%), a new boiler/heating system (11%) and/or draught proofing (10%).

Fewer in Caithness and Sutherland than regionally say they would like to have a job that helps the environment or helps to prevent climate change (14% vs 22%) or feel that their job will be affected by the move towards net zero (38% vs 46%).

Priorities for communities to thrive

Residents in Caithness and Sutherland are more likely than average to be pessimistic about their community (23% vs 16% regionally), although twice as many - just under half - are optimistic (46%). The top priorities for communities in Caithness and Sutherland to thrive are: more job opportunities, housing for local families, and local businesses and trades. More job opportunities (46%) and more working age people moving into the area (25%) are higher priorities for these communities, than regionally (32% and 19% respectively).

ACCESS TO FACILITIES AND SERVICES (1)

Most households in Caithness and Sutherland have a primary school (79%), a hall or function room that can be rented (72%), a convenience store (72%), a post/mobile post office (71%) and a daytime bus (69%) available within a 15-20 minute walk of their home, while almost all have these available within a 20-minute drive. However, other key services and facilities are less accessible. Two thirds (66%) do not have a cottage or community hospital, 52% do not have a recycling centre, and half do not have a supermarket (51%) or a residential care facility (51%) within a 15-20 minute walk of their home.

32% **OF HOUSEHOLDS SAY IT IS DIFFICULT TO STREAM A TV PROGRAMME OR FILM** higher than the average across the region overall (21%)

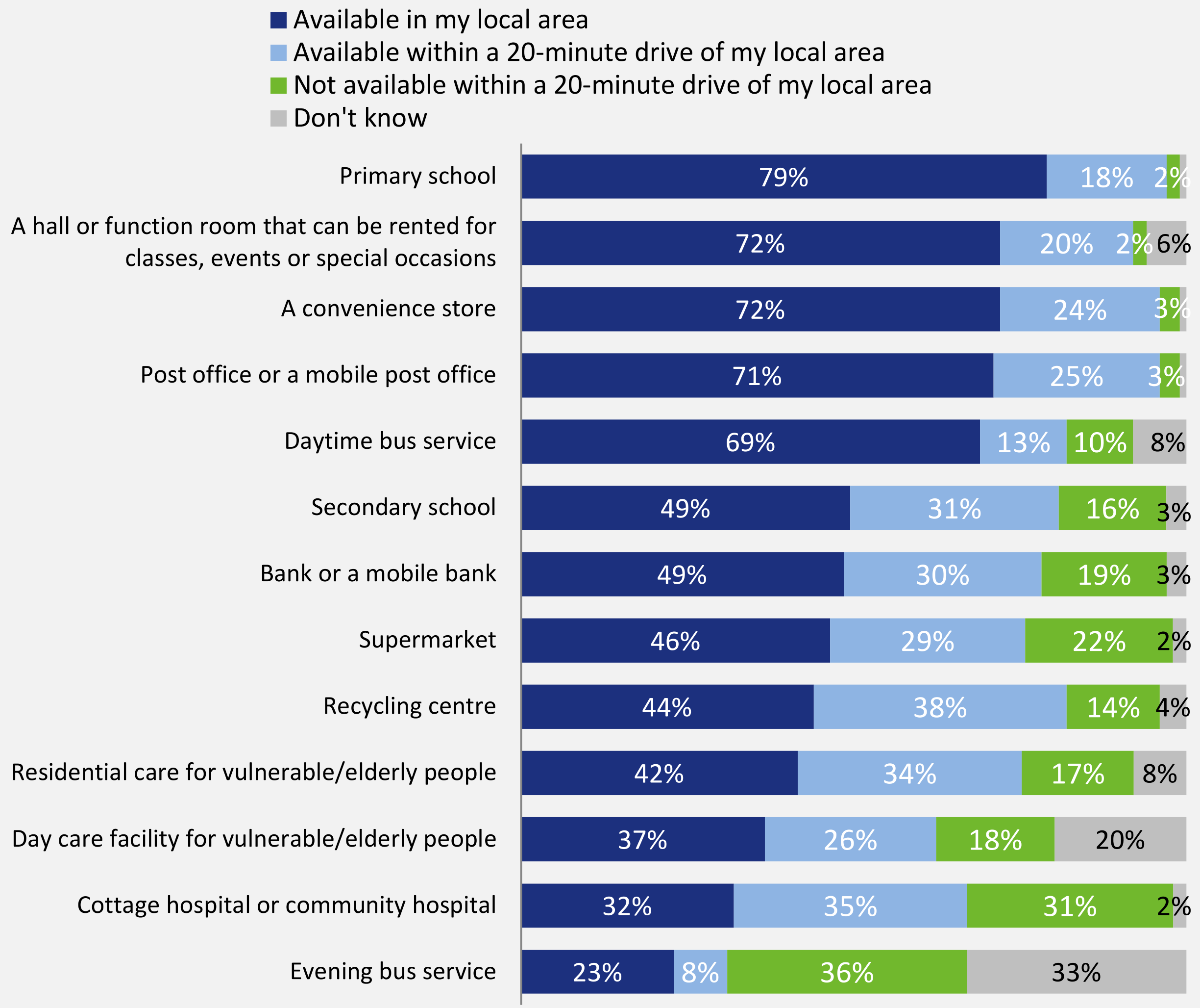
38% **OF HOUSEHOLDS SAY IT IS DIFFICULT TO TAKE OUT MONEY FROM A CASH MACHINE** higher than the average across the region overall (28%)

55% **OF HOUSEHOLDS SAY IT IS DIFFICULT TO HAVE A TAKEAWAY DELIVERED** higher than the average across the region overall (44%)

Compared to the Highlands and Islands overall, households in Caithness and Sutherland are **less likely to say they can access daytime bus services (69% vs 77%) or evening bus services (23% vs 43%)** within their local area.

A higher proportion of households in Caithness and Sutherland (72%) than the region overall (62%) agree that voluntary organisations and volunteers are having to provide services in their local area that should be done by local authorities.

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 Caithness and Sutherland (373); fieldwork = 28 January – 25 March 2022

ACCESS TO FACILITIES AND SERVICES (2)

A majority of households in Caithness and Sutherland have access to a GP (87%) permanently located within a 20-minute drive of their local area, while more than half say they can access a permanent or a visiting midwife or health visitor (59%) or home care services (55%) within this distance. A third (33%) say they can access mental health services either online or in person (although 49% don't know). Meanwhile around a fifth can't access dental services (19%) or a physiotherapist (15%) in person (within a 20 minute drive of their local area).

Excluding those who don't know whether the service is available locally, households in Caithness and Sutherland are more likely than those across the region overall to say they are unable to access **mental health services (34% vs 20%)** or **home care services (10% vs 6%)** within a 20-minute drive or online.

Proportions unable to access other services reflect regional averages – **dental services (14% vs 15%), physiotherapist (11% vs 11%), midwife or health visitor (6% vs 5%)** and **GP (3% vs 3%).**

Reliance on and satisfaction with transport services

The majority of households own at least one vehicle (88%), with half (50%) owning two or more (in line with the regional averages of 87% and 44%).

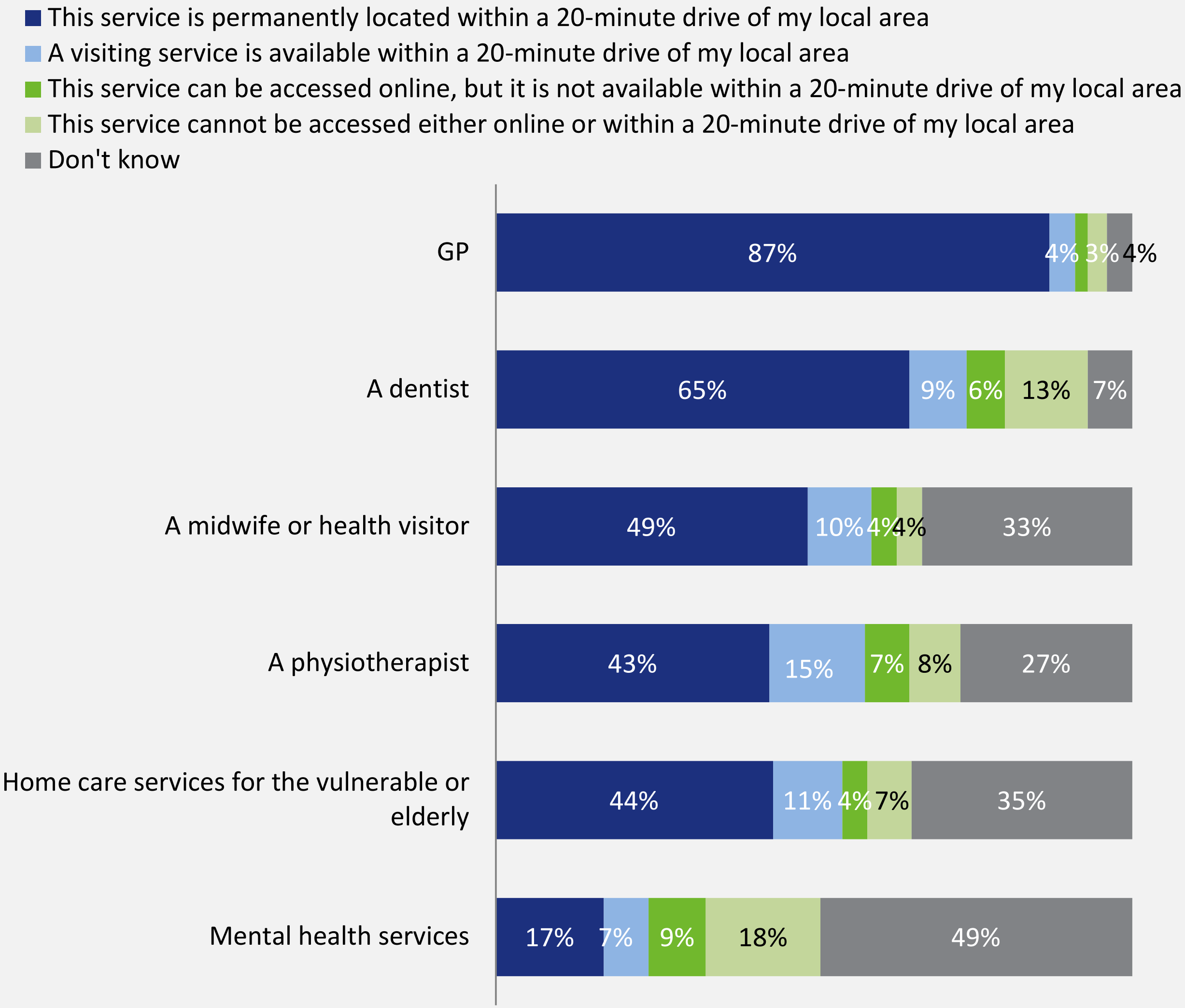
- 90% rely on a car or van, in line with the region overall (87%)
- 14% rely on air transport, in line with the region overall (17%)
- 13% rely on buses, lower than in the region overall (20%)
- 12% rely on trains, in line with the region overall (12%)
- 5% rely on ferries, lower than in the region overall (23%)

Levels of dissatisfaction with train frequency (42% dissatisfied) and reliability (33%) are higher than in the region overall (25% and 25%).

Those in Caithness and Sutherland are also more likely than average to be dissatisfied with the cost (48% vs 41%), frequency (45% vs 19%) and reliability (36% vs 17%) of air services.

Dissatisfaction with bus reliability (33% dissatisfied) and frequency (48%) is also higher than regionally (22% and 31%).

Q. For each of the following health and care services, please indicate which best describes their availability within your local area?



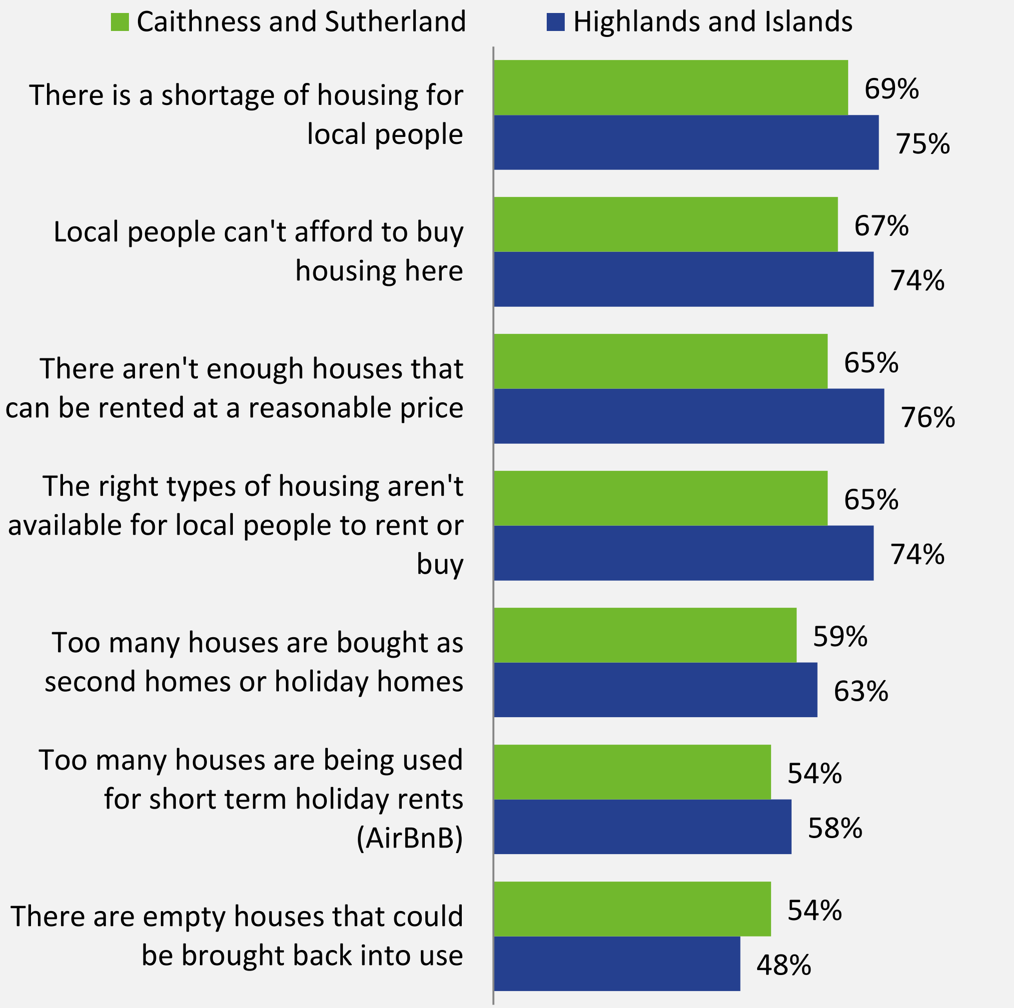
Base: All households in Caithness and Sutherland (373); fieldwork = 28 January – 25 March 2022

HOUSING SITUATION

The majority (91%) of households in Caithness and Sutherland say their housing situation meets their needs well (90% regionally). However, just over half (54%) feel their home is expensive to heat and 19% that it is difficult to heat. Compared to households in the region overall, those in Caithness and Sutherland are less likely to say that there is a shortage of housing in their local area (69% vs 75%), that locals can't afford housing (67% vs 74%), that there aren't enough houses that can be rented at a reasonable price (65% vs 76%) or that the right types of housing aren't available for local people (65% vs 74%). However, around two thirds do still agree with each of these statements.

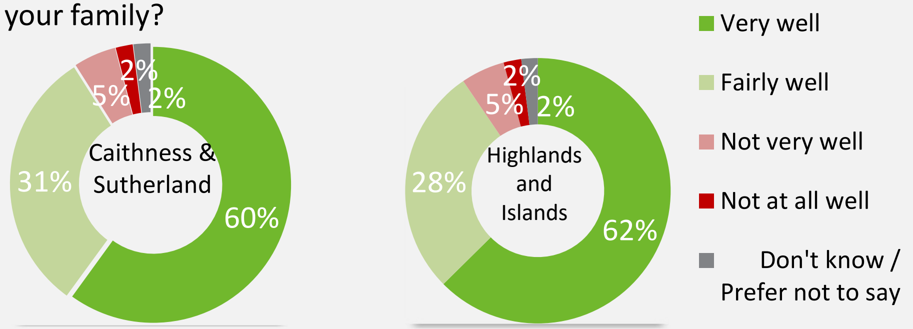
Q. To what extent does each of these describe the housing situation in your local area?

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



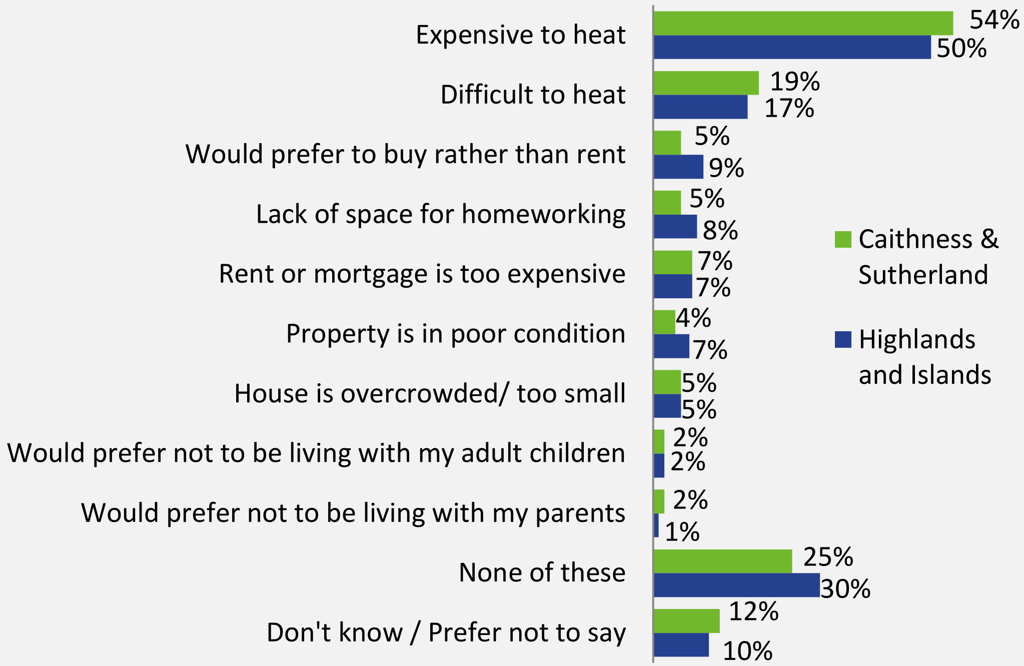
Base: All households in Caithness and Sutherland (373) and in Highlands and Islands (4,442); fieldwork = 28 January - 25 March 2022

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



Base: All households in Caithness & Sutherland (373) and in 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 Caithness and Sutherland (373) and in Highlands and Islands (4,442); fieldwork = 28 January – 25 March 2022

EMPLOYMENT, ENTREPRENEURSHIP AND TRAINING

Three in five Caithness and Sutherland residents in work say they are happy in their current job, in line with the region overall. A smaller proportion than regionally say they would like to work fewer hours (10% vs 18%) or, in terms of future aspirations, have a job that helps the environment or prevents climate change (14% vs 22%).

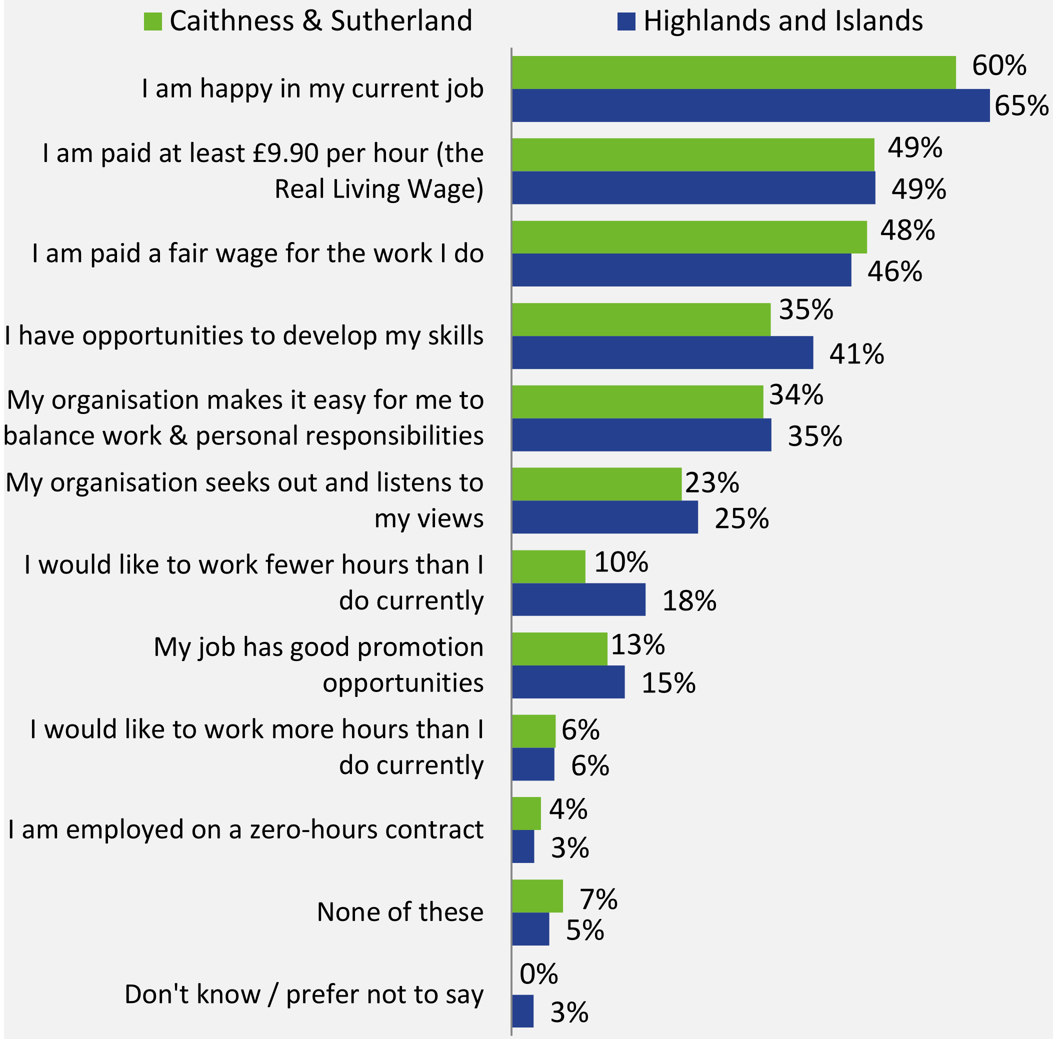
41% work in the private sector (similar to the region overall at 49%)

44% work in the public sector (similar to the region overall at 42%)

4% work for a charity/voluntary organisation (similar to the region overall at 6%)

17% are self-employed (similar to the region overall at 19%)

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



Base: all in work, aged 16+ in Caithness & Sutherland (203) and Highlands and Islands (2,240); fieldwork = 28 January - 25 March 2022

10% of those in work have more than one job, similar to the region overall (13%).

16% of those aged 65+ are still in work, similar to the region overall at 13%.

Fewer say they would like to have a job that helps the environment or prevents climate change than in the region overall (14% vs 22%).

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 Caithness & Sutherland (170) and Highlands and Islands (2,031); fieldwork = 28 January - 25 March 2022

38% of those in work say that their job would be affected by the need to reduce carbon emissions, which is lower than in the region overall (46%).

In Caithness and Sutherland, 40% of those who have not accessed training say they find it difficult to access courses/training in person, higher than in the region overall (30%) and 12% find it difficult to do so online (compared to 9% overall). The main barriers to accessing training are: having to spend time away from home (33%), broadband not being reliable (29%) or fast enough (29%).

Residents in Caithness and Sutherland are **less likely to say that the training opportunities available locally allow young people to stay in the area** (46% disagree vs 37% regionally).

IMPACT OF COVID-19 ON ACCESSING GOODS AND SERVICES

There is consensus among residents in Caithness and Sutherland that it is more expensive to buy goods and services now than it was pre-pandemic, with 88% saying this is the case in their local area, in line with the region overall. However, more in Caithness and Sutherland (73%) than regionally say they find it more difficult to get tradespeople to do work around their house compared with pre-pandemic.

88% of households say it is more expensive to buy goods and services now than it was before the pandemic, in line with the region overall (89%).

75% say community events have been cancelled and haven't restarted, similar to the region overall (72%).

73% of households say it has been more difficult get tradespeople to do work around residents' houses, higher than the region overall (67%).

65% of households say people are supporting local businesses more than they used to, in line with the region overall (67%).

64% of households say it is more difficult to get hold of goods needed now than it was before the pandemic, similar to the region overall (61%).

50% of households say some businesses that closed because of lockdown haven't reopened, compared to 56% in the region overall.

44% say people have been moving to live here because they can work from home, in line with the region overall (45%).

31% of households say increased numbers of tourists have made it hard for local people to access ferry or air services, similar to the region overall (34%).

PARTICIPATION, PRIDE AND LOCAL DECISION MAKING

Just over half (53%) of residents report taking part in activities in their local community (55% regionally). Most commonly these were attending local community events (37%), local groups or sports clubs (27%) or volunteering for a charity, social enterprise or community group (18%).

There is scope to improve feelings of influence over local decision making. Almost half of Caithness and Sutherland residents (46%) disagree they can influence decisions in their local area, higher than in the region overall (33%).

Participation

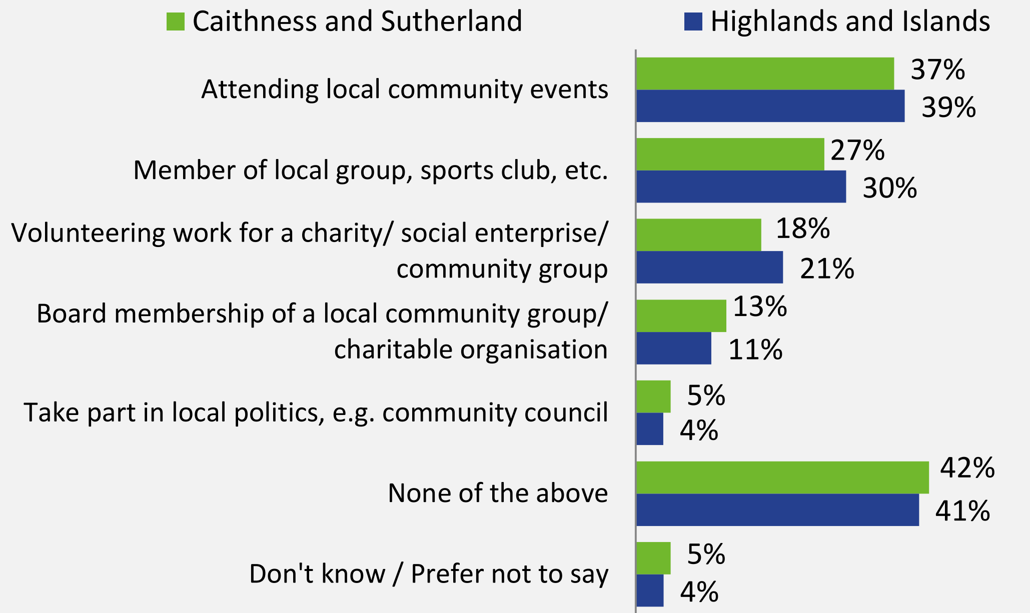
37% ATTEND LOCAL COMMUNITY EVENTS

27% ARE MEMBERS OF LOCAL GROUPS OR SPORTS CLUBS

18% VOLUNTEER

13% ARE BOARD MEMBERS

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



Base: All residents, aged 16+ in Caithness & Sutherland (455) and Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

Pride

86% ARE PROUD TO LIVE IN CAITHNESS AND SUTHERLAND

in line with the region overall (88%)

Local decision making

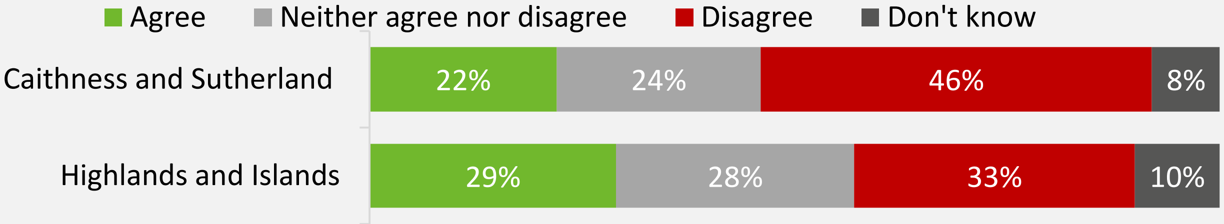
22% AGREE THAT LOCAL PEOPLE CAN INFLUENCE DECISION MAKING IN THEIR LOCAL AREA

lower than the region overall (29%)

46% DISAGREE

higher than the region overall (33%)

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 Caithness & Sutherland (455) and Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

TOWARDS NET ZERO – ENERGY SOURCES AND ELECTRIC VEHICLES

Among households in Caithness and Sutherland, the most commonly used energy sources for heating homes are oil, electricity, wood/biomass and mains gas. The use of oil (40%) and coal (18%) is higher than in the region overall (28% and 12% respectively), while the use of gas is lower (20% vs 33%) (access to the gas grid is limited in the area). Solar panels (6%) and air source heat pumps (3%) are the most commonly used green technologies for home heating, though the use of air source heat pumps is lower than in the region overall. Fewer than one in twenty households currently have, or plan to buy or lease an electric car.

Dwelling types

Households in Caithness and Sutherland are most likely to live in a detached (45%) or semi-detached house (28%). Compared to the Highlands and Islands overall, more live in a house with a working croft (5%) and fewer in a purpose-built flat (4% vs 8%).

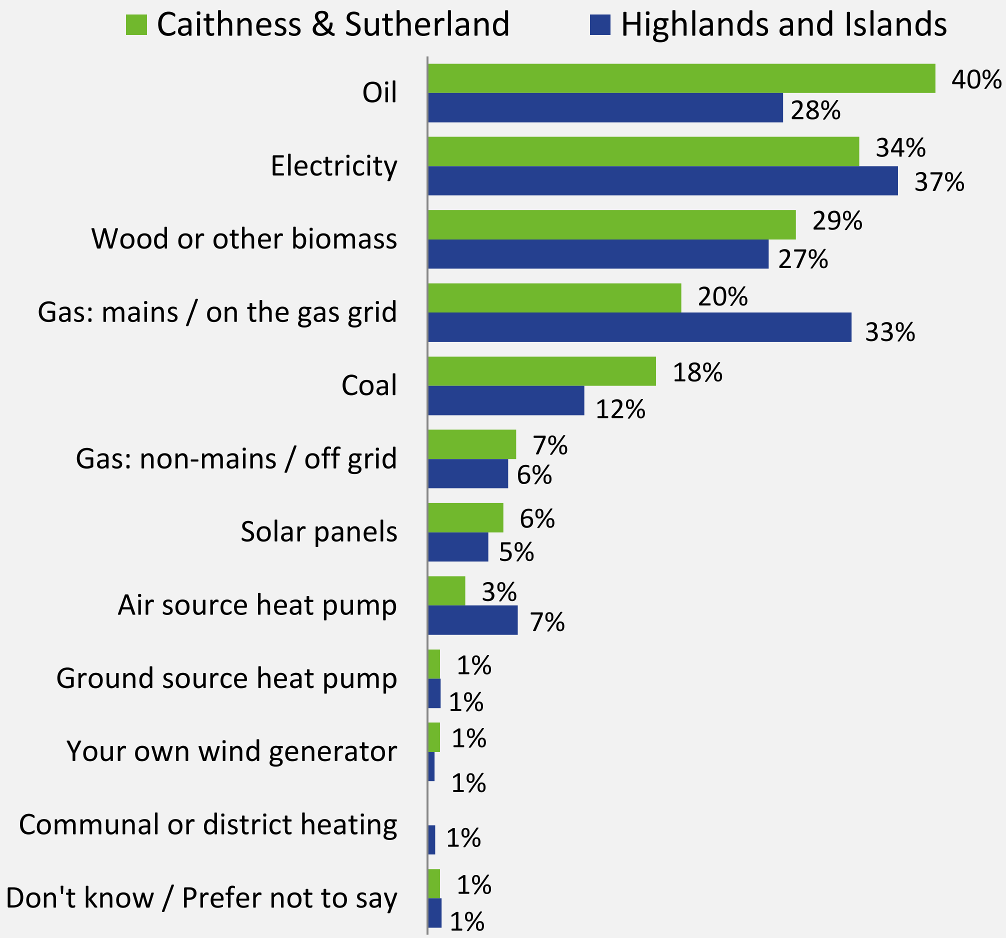
Electric cars

Fewer households in Caithness and Sutherland than regionally have an electric or hybrid car (4% vs 7%) while a similar proportion plan to buy or lease one (4% vs 6% regionally). A third (32%) have thought about buying an electric/hybrid car and decided against it, more than the region overall (26%), while 21% have not yet made a decision (24% regionally).

Consistent with the region overall, cost (88%) and availability of public charging points (76%) are key concerns in relation to owning or leasing electric or hybrid cars (85% and 76% respectively regionally). Concerns are higher than average in terms of battery life (72% vs 62%) and distance covered on a single charge (87% vs 80%).

Households in Caithness and Sutherland are more likely than average to say they would find it easy to charge an electric vehicle on-street or at a car park (33% compared to 26% regionally). However, more than half (53%) would find it difficult to do so (57% regionally).

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



Base: All households in Caithness and Sutherland (373) and Highlands and Islands (4442); fieldwork = 28 January - 25 March 2022

NOTES

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

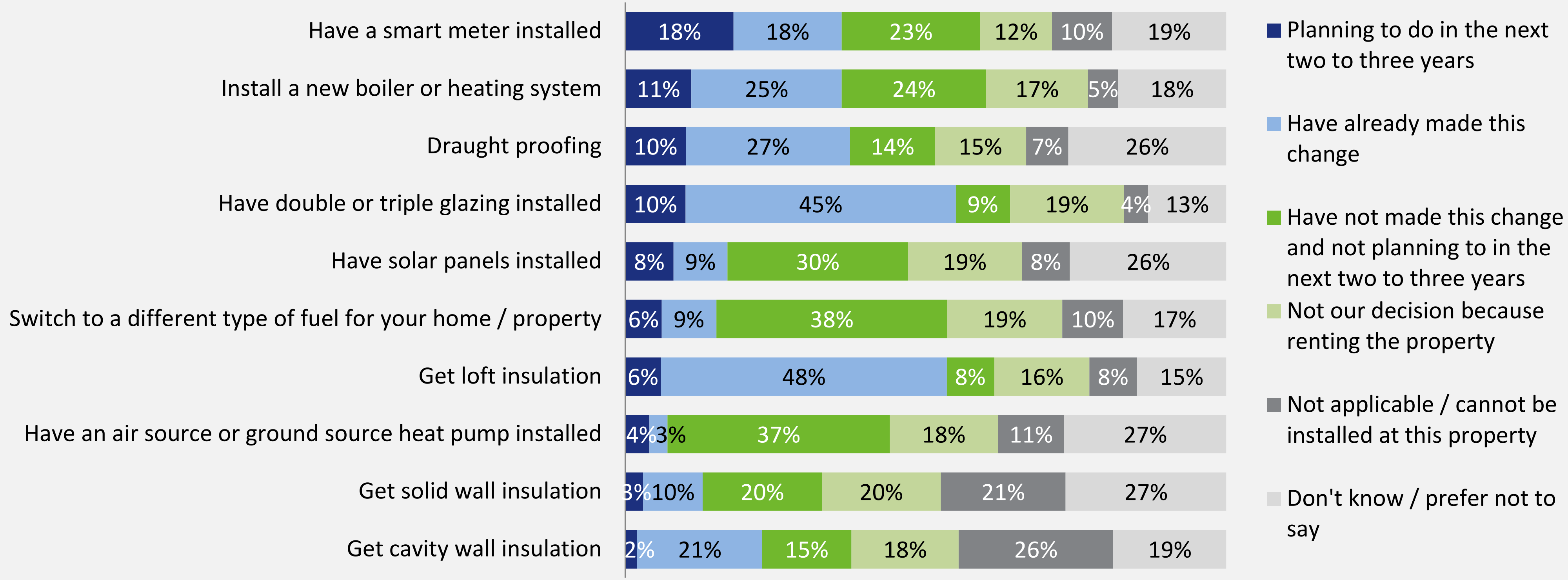
TOWARDS NET ZERO – ENERGY EFFICIENCY IMPROVEMENTS

Almost two in five households in Caithness and Sutherland (37%) are planning to make energy efficiency improvements in the next two to three years. The most commonly planned actions are having a smart meter installed (18%), installing a new boiler/heating system (11%) and/or draught proofing (10%).

Among households who are not planning to switch fuel type, the main reasons are: affordability (46%), not wanting to make the change (40%), and a lack of financial support from the government (35%).

37% OF HOUSEHOLDS IN CAITHNESS AND SUTHERLAND 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?



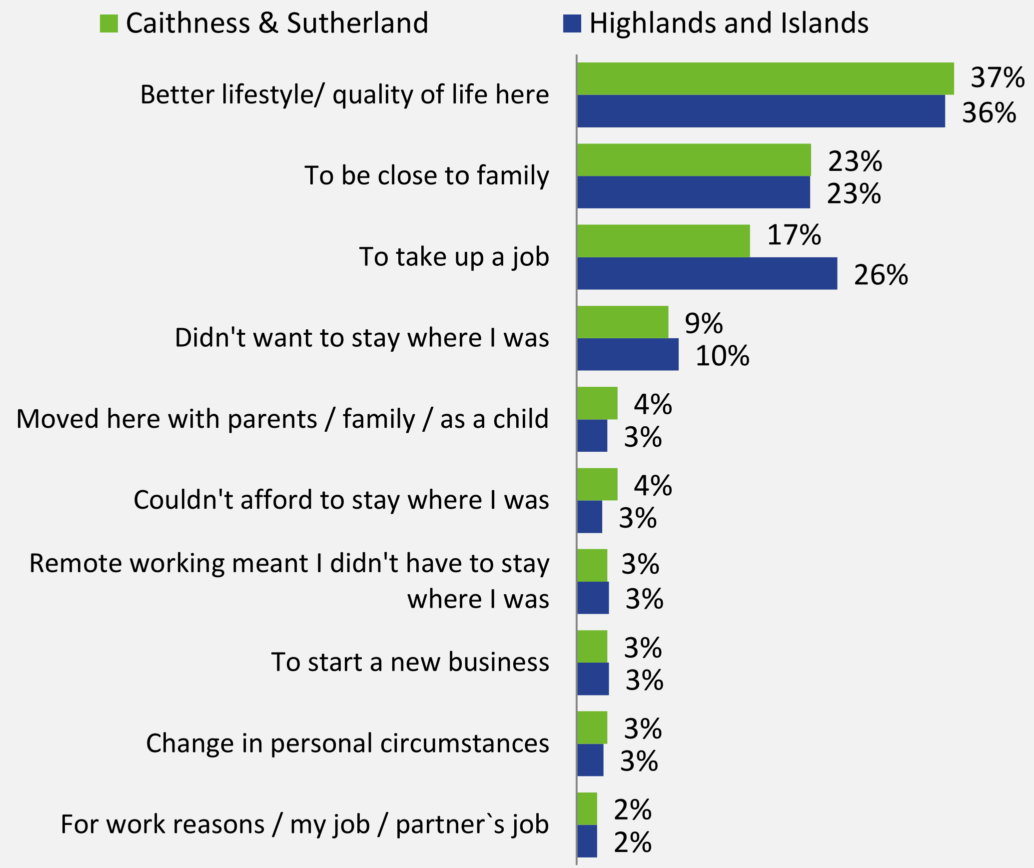
Base: All households in Caithness and Sutherland (373); fieldwork = 28 January - 25 March 2022

POPULATION MOVEMENT AND MIGRATION TO THE AREA

Among residents of Caithness and Sutherland who have not always lived in the Highlands and Islands, the main reasons for moving to the region were for a better quality of life or to be closer to family, in line with the region overall. However, fewer than regionally mention taking up a job as a main reason for moving back.

Reflecting this, households in Caithness and Sutherland are less likely than those in the region overall to agree that people are moving to the area for new job opportunities. They are also more likely than average to feel that people are leaving their local area because they can't find work and that most of the people who move to the area are retired.

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 Caithness & Sutherland (281) and in Highlands and Islands (3,449); fieldwork = 28 January - 25 March 2022

Among those in Caithness and Sutherland who have not always lived in the region:

17% **say they moved to take up a job, lower than the region overall**

Among all households in Caithness and Sutherland:

69% **say people are leaving their local area because they can't find work, higher than the region overall at 47%**

66% **say most of the people who move to their local area are retired, higher than the region overall at 56%**

40% say new businesses are starting up in their local area, similar to the region overall at 46%

14% **say more people are moving to their local area for new job opportunities, lower than regionally at 29%**

PRIORITIES FOR COMMUNITIES TO THRIVE

The top priorities for communities in Caithness and Sutherland to thrive are: more job opportunities, housing for local families, and local businesses and trades. Job opportunities and having more working age people moving into the area are seen as higher priorities than for the region overall.

Optimism

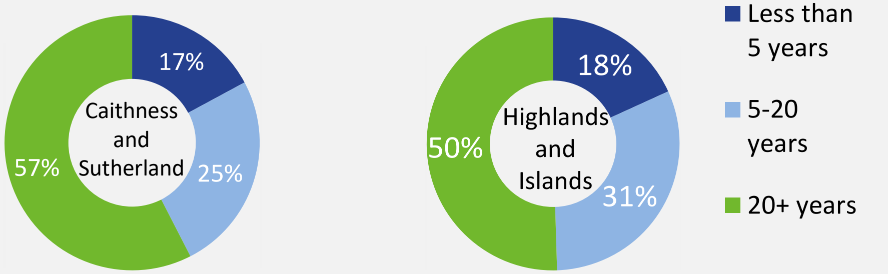
46% of Caithness and Sutherland residents are optimistic about their community (52% regionally). Meanwhile 23% are pessimistic, higher than in the region overall (16%).

Length of residence and future intentions

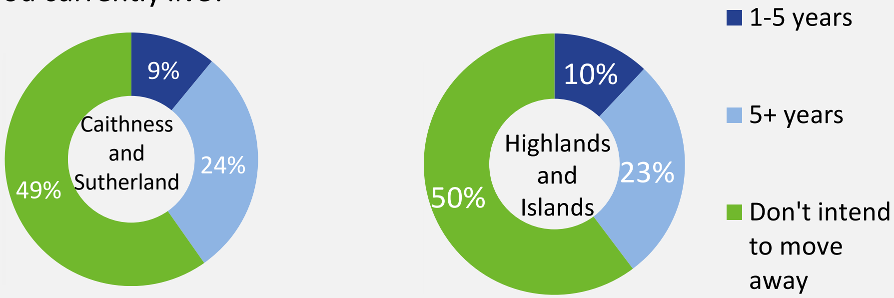
57% of residents have been living in their local area for more than 20 years, higher than regionally (50%). A quarter (25%) have lived in their local area for between 5 and 20 years and 17% for less than five years.

In terms of future intentions, **49% of residents don't intend ever to move away from their local area**, in line with 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?

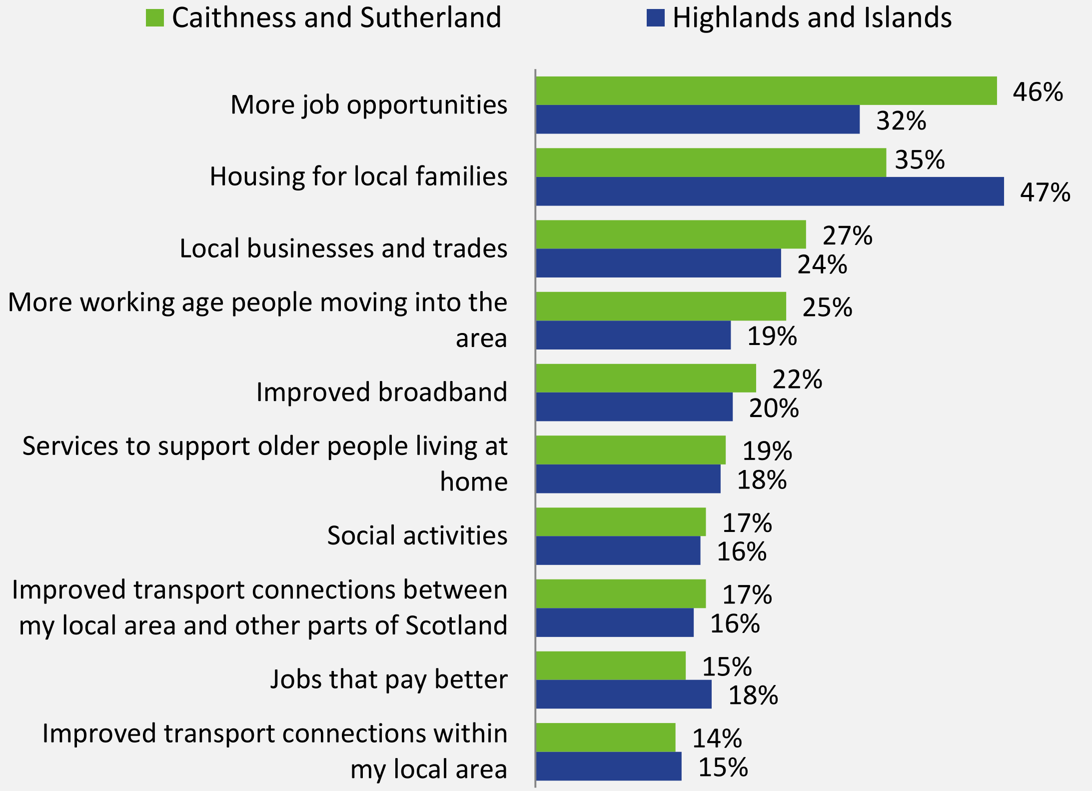


Base: All residents, aged 16+ in Caithness and Sutherland (455) and the Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

Priorities

More job opportunities (46%) and **more working age people moving into the area (25%) are higher priorities for communities in Caithness and Sutherland**, compared to the region overall (32% and 19% respectively). Housing for local families is still a top priority, but lower than the region overall (35% vs 47%).

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



Base: All residents, aged 16+ in Caithness & Sutherland (455) and Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

METHODOLOGY

Sampling

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

Method

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

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

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

Fieldwork

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

In Caithness and Sutherland, 455 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.

For more information contact:
T: +44 (0) 1463 245 245
E: hieresearch@hient.co.uk

Ipsos

HIE
Highlands and Islands Enterprise
Iomairt na Gàidhealtachd 's nan Eilean