

MY LIFE IN THE HIGHLANDS AND ISLANDS RESEARCH

Argyll and the Islands

Summary report

October 2022



EXECUTIVE SUMMARY – ARGYLL AND THE ISLANDS

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 of Scotland responded to the survey, including 690 in Argyll and the Islands.

Connectivity and access to services

Most households in Argyll and the Islands have a daytime bus service (83%), primary school (72%), convenience store (71%), hall/function room (69%) and post office (65%) within a 15-20 minute walk of their home. Some need to travel further to access other key services. For example, more than half cannot access a day care facility (52%) recycling centre (54%), secondary school (55%), residential care (56%) or supermarket (57%) locally. Relative to the region overall, fewer households than average can access a primary or secondary school, residential care, day care or a supermarket locally.

Access to certain health services is also lower than average. Excluding those who don't know about service availability, 21% cannot access a dentist, 16% a physiotherapist, 8% a midwife or health visitor, or 5% a GP within a 20-minute drive or online.

More households in Argyll and the Islands than regionally said they would find it hard to have a takeaway delivered (52%). 28% would find it difficult to take money out of a cash machine and 22% to stream a TV programme/film online.

Housing

Most households in Argyll and the Islands say their housing situation meets their needs well, although more than half find their home expensive to heat. Compared to the Highlands and Islands overall, households in Argyll and the Islands are more likely to perceive certain housing challenges in their area: too many houses being used for short-term holiday rents (73%) or bought as holiday homes (78%), a shortage of housing (79%) and the right types of housing (80%) for local people, and a lack of affordable housing to rent (81%).

Employment and training

Levels of self-employment are higher than average in Argyll and the Islands (27% vs 19%) and 16% would like to start their own business (12% overall). 16% of those in work have more than one job (13% regionally). Of those who have not accessed training, 46% would find it difficult to do so in person and 13% to do so online, with time away from home and the reliability and speed of broadband key barriers.

Impact of Covid-19 and transport

86% of households in Argyll and the Islands say goods and services are more expensive in their local area now than they were before the pandemic, and they are more likely to find it difficult to access tradespeople (74% vs 67% regionally) or say people have been moving to live here because they can work from home (52% vs 45%).

Households in Argyll and the Islands are more likely than those across the region overall to rely on ferry services (59% vs 23%). Levels of dissatisfaction with reliability (50% dissatisfied) and frequency (35%) of ferry services are higher than average (34% and 26%) and over half (57%) feel that increased numbers of tourists have made it hard for local people to access ferry or air services.

Participation, pride and local decision making

Two thirds (67%) of residents report taking part in activities in their local community. Most commonly these are: attending local community events, membership of local groups or sports clubs, and volunteering.

91% of residents express pride in living in Argyll and the Islands, higher than the average for the Highlands and Islands overall (88%). But they are split about whether local people are able to influence decision-making, in line with regionally.

Towards net zero

38% of households in Argyll and the Islands are planning to make energy efficiency improvements in the next two to three years, most commonly installing a smart meter (18%), draught proofing (11%) or new boiler/heating system (9%).

46% of those in work in Argyll and the Islands believe their job will be affected by the move towards net zero, in line with the region overall.

Priorities for communities to thrive

While more residents in Argyll and the Islands are optimistic (51%) than pessimistic (20%) about their community, levels of pessimism are higher than average (16%). Top priorities for communities in Argyll and the Islands to thrive are: housing for local families (56%), more job opportunities (38%) and more working age people moving into the area (32%). All are higher priorities for these communities, than for residents of the Highlands and Islands overall.

ACCESS TO FACILITIES AND SERVICES (1)

Most households in Argyll and the Islands have a **daytime bus service (83%)**, **primary school (72%)**, **convenience store (71%)**, **hall/function room (69%)** and **post office (65%)** 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. More than half do not have access to a **supermarket (57%)** residential care (56%), **cottage/community hospital (56%)**, **secondary school (55%)**, **recycling centre (54%)**, or a **day care facility (52%)** within their local area.

22% OF HOUSEHOLDS SAY IT IS DIFFICULT TO STREAM A TV PROGRAMME OR FILM in line with the region overall (21%)

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

52% OF HOUSEHOLDS SAY IT IS DIFFICULT TO HAVE A TAKEAWAY DELIVERED higher than in the region overall (44%)

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

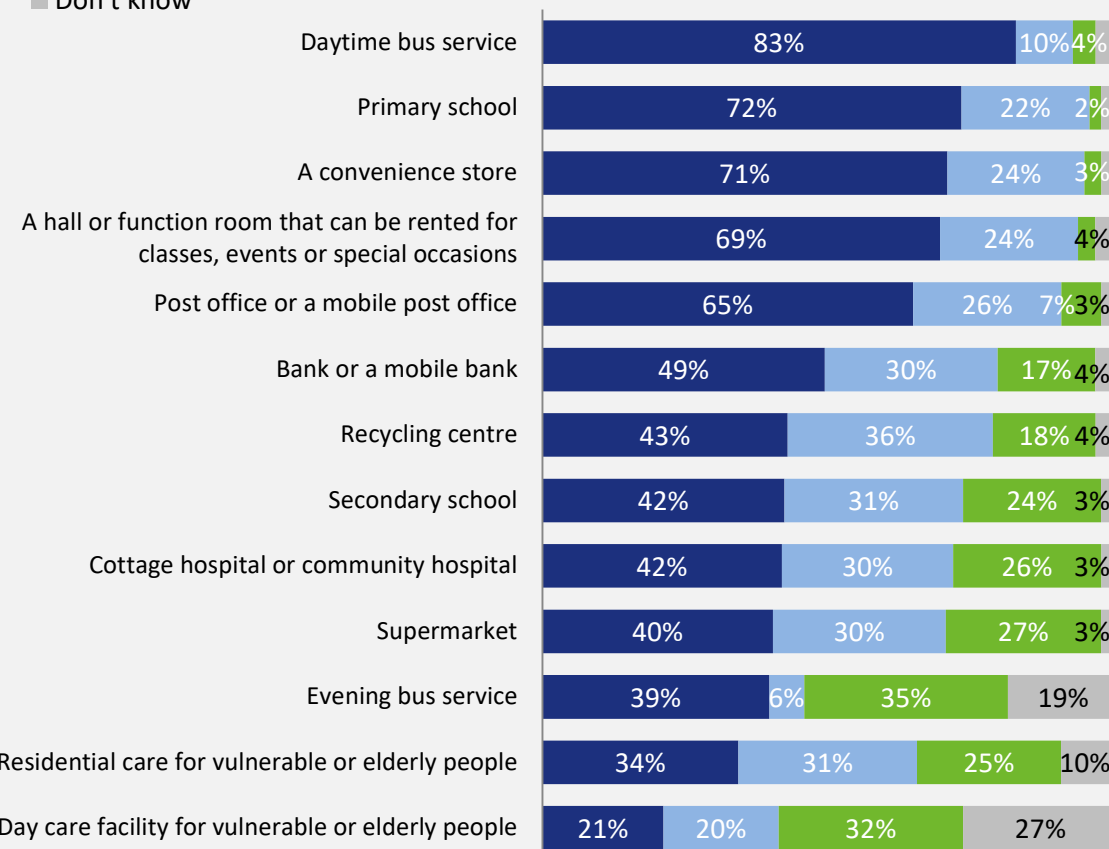
- a **primary school** (72% vs 77%)
- a **secondary school** (42% vs 51%)
- **residential care** (34% vs 43%)
- **day care facilities** (21% vs 27%)
- a **supermarket** (40% vs 47%).

However, households are **more likely** than average to have access a **daytime bus service** (83% vs 77%).

Furthermore, while more than half (56%) do not have access to a cottage/community hospital in their local area, 45% do, higher than the average regionally (35%).

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.

- Available in my local area
- Available within a 20-minute drive of my local area
- Not available within a 20-minute drive of my local area
- Don't know



Base: All households in Argyll and the Islands (582); fieldwork = 28 January – 25 March 2022

ACCESS TO FACILITIES AND SERVICES (2)

A majority of households have access to a GP (80%) or dentist (60%) permanently located within a 20-minute drive of their local area. More than half can access a permanent or a visiting midwife or health visitor (57%), home care services (61%), or physiotherapist (51%) within this distance, although around three in ten don't know whether these services are available or not. Over half (52%) say they can access mental health services in person or online, although 46% don't know of their availability.

Excluding those who don't know whether the service is available locally, households in Argyll and the Islands are more likely than those across the region overall to say they are **unable to access dental services (21% vs 15%), a physiotherapist (16% vs 11%), a midwife or health visitor (8% vs 5%) or a GP (5% vs 3%),** within a 20-minute drive or online.

Proportions unable to access the other services are in line with the region overall – **mental health services (21% vs 20%), and home care services (5% vs 6%).**

Reliance on and satisfaction with transport services

The vast majority of households in Argyll and the Islands own at least one vehicle (85%), with 39% owning two or more (in line with the region overall at 87% and 44% respectively). They are less likely to own three or more vehicles than in the region overall (7% vs 10%).

- 85% rely on a **car or van**, similar to the region overall at 87%
- 59% rely on **ferries**, higher than the region overall at 23%
- 22% rely on **buses**, similar to the region overall at 20%
- 14% rely on **trains**, similar to the region overall at 12%
- 11% rely on **air transport**, lower than the region overall at 17%.

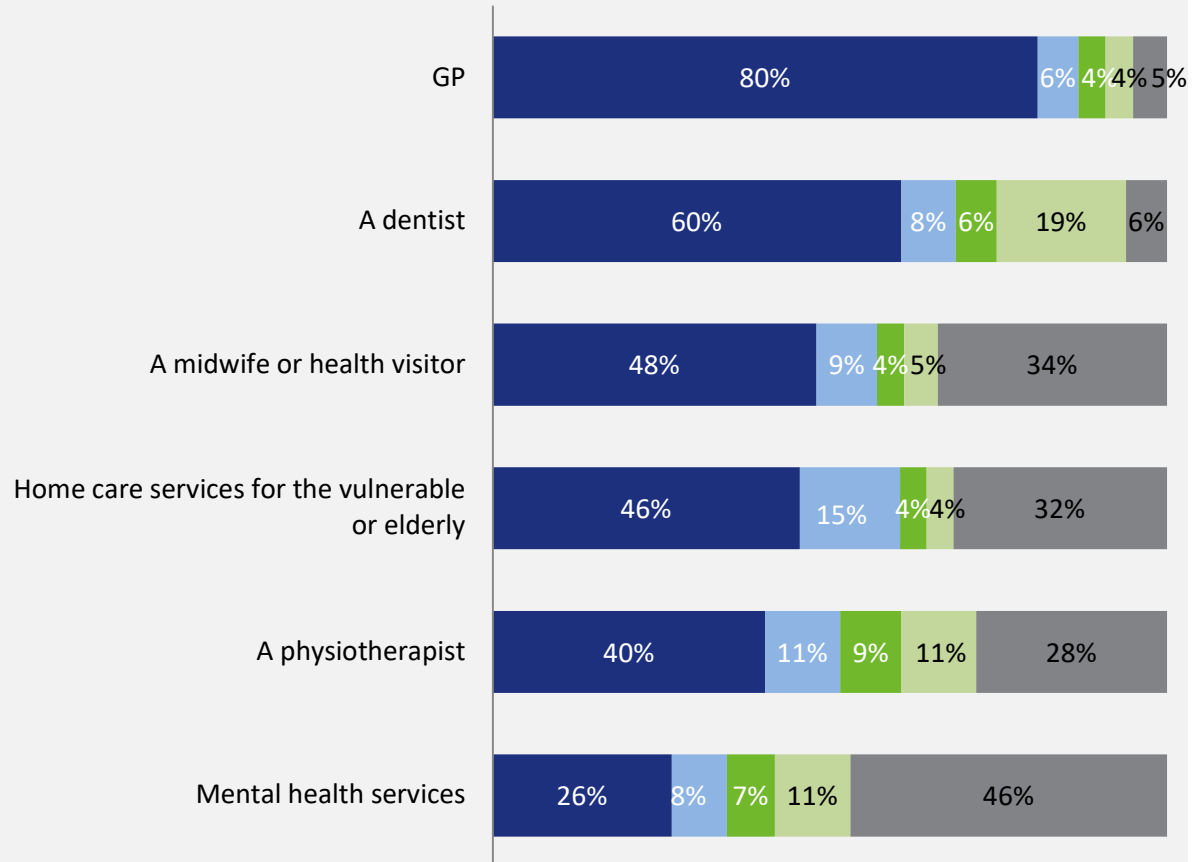
Levels of satisfaction with frequency (51% satisfied) and cost (34%) of **train services** are higher than in the region overall (43% and 21%).

Levels of satisfaction with the cost (53% satisfied) and reliability (63%) of **bus travel** are higher than in the region overall (44% and 52%).

Levels of dissatisfaction with **ferry** frequency (35% dissatisfied) and reliability (50%) are higher than in the region overall (26% and 34%).

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

- This service is permanently located within a 20-minute drive of my local area
- A visiting service is available within a 20-minute drive of my local area
- This service can be accessed online, but it is not available within a 20-minute drive of my local area



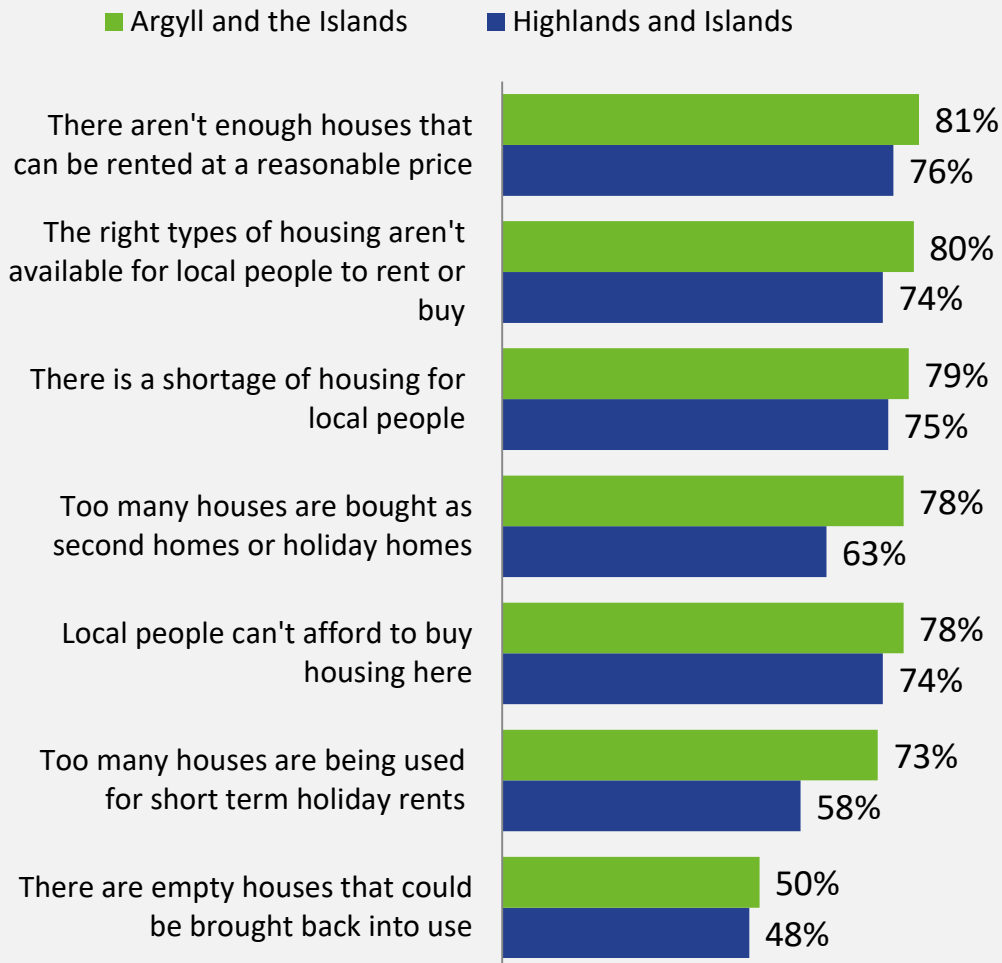
Base: All households in Argyll and the Islands (582); fieldwork = 28 January – 25 March 2022

HOUSING SITUATION

The majority of households in Argyll and the Islands say their housing situation meets their needs well, in line with the region overall (both 90%). However, 54% say their home is expensive to heat, and more households than regionally say their home is difficult to heat (22%, compared to 17%). Households are more likely to say there is a shortage of housing for local people, that the right types of housing aren't available for local people, too many houses are being used for short-term holiday rents or bought as holiday homes and there aren't enough houses that can be rented at a reasonable price than is the case in the region overall.

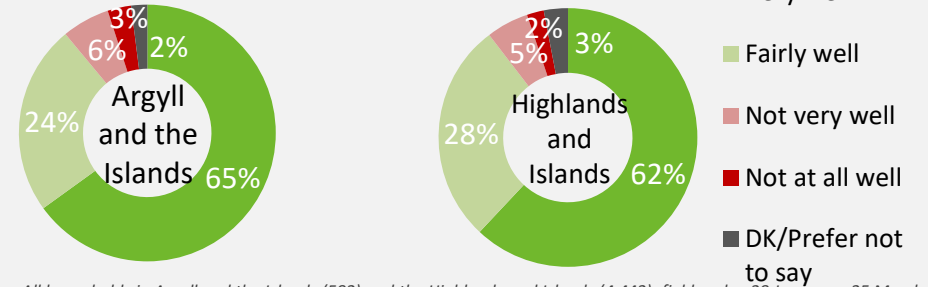
Q. To what extent does each of these describe the housing situation in your local area?

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



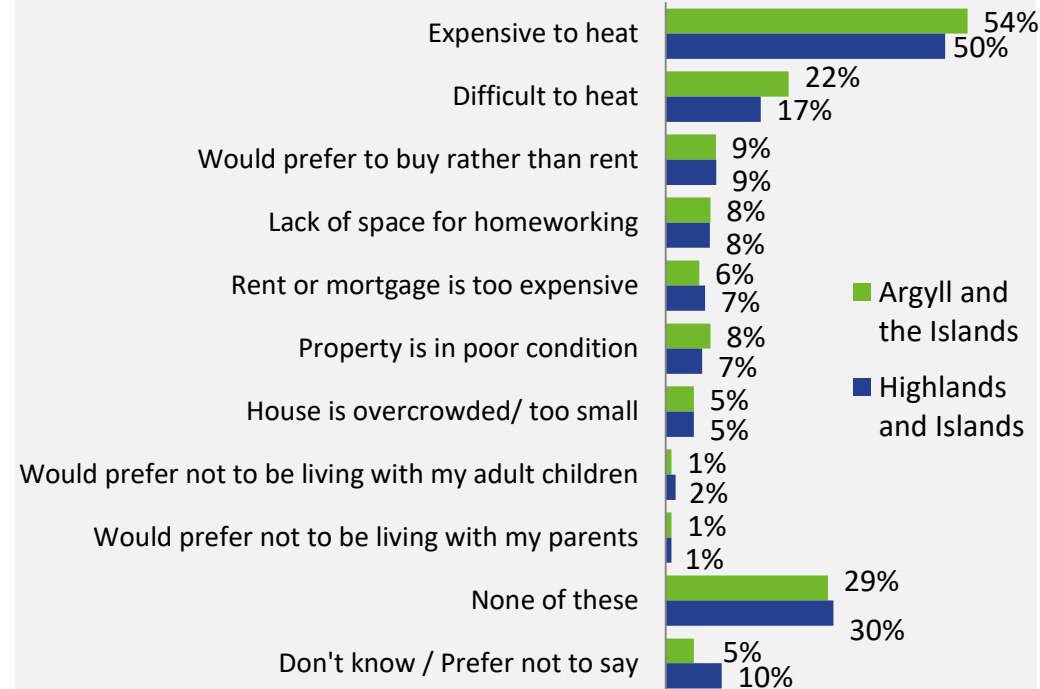
Base: all households in Argyll and the Islands (582) and the Highlands and Islands (4,442); fieldwork = 28 January - 25 March 2022

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



Base: All households in Argyll and the Islands (582) 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 Argyll and the Islands (582) and the Highlands and Islands (4,442); fieldwork = 28 January - 25 March 2022

EMPLOYMENT, ENTREPRENEURSHIP AND TRAINING

A quarter (27%) of those in work in Argyll and the Islands are self-employed (compared to 19% in the region overall) and 16% would like to start their own business.

Most (61%) residents are happy in their current job. 46% say they are paid the Real Living Wage and 41% that they are paid a fair wage. 46% also say their job would be affected by the move towards net zero. These findings are in line with the region overall.

59% work in the private sector (higher than the region overall at 49%) **32%** work in the public sector (lower than the region overall at 42%) **5%** work for a charity/voluntary organisation (similar to the region overall at 6%) **27%** 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?



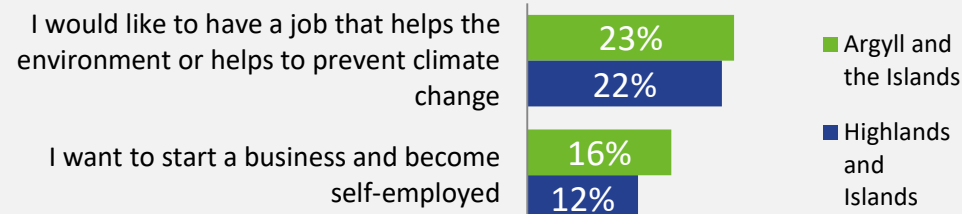
Base: all in work, aged 16+ in Argyll and the Islands (287) and in the Highlands and Islands (2,240); fieldwork = 28 January - 25 March 2022

16% of those in work have more than one job, in line with the region overall at 13%.

14% of those aged 65+ are still in work, similar to the region overall at 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+ (2,031), Argyll and the Islands (219); fieldwork = 28 January - 25 March 2022

46% 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%).

46% of residents feel it would be difficult to access courses or training in person and 13% say it would be difficult to do so online (higher than regionally, 30% and 9%). The main reasons are: having to spend time away from home (35%), broadband not being reliable (30%) or fast enough (29%).

Residents in Argyll and the Islands are **less likely than in the region overall to feel that the training opportunities available locally allow young people to stay in the area** (50% disagree vs 37% regionally).

IMPACT OF COVID-19 ON ACCESSING GOODS AND SERVICES

A majority of residents in Argyll and the Islands say it is more expensive to buy goods and services now than it was pre-pandemic, with 86% saying this is the case in their local area, similar to the region overall. However residents are more likely than those in the region overall to say it has been more difficult to access tradespeople, that increased numbers of tourists have made it difficult for local people to access ferry or air services, and that people have been moving to their local area because they can work from home.



86% say it is more expensive to buy goods and services now than it was before the pandemic, similar to the region overall (89%).



63% 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%).



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



57% 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%).



72% say it has been more difficult to get tradespeople to do work around residents' houses, higher than the region overall (67%).



54% say businesses that closed because of lockdown haven't reopened, similar to the region overall (56%).



67% say people are supporting local businesses more than they used to, in line with 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%).

PARTICIPATION, PRIDE AND LOCAL DECISION MAKING

About three fifths of Argyll and the Islands residents (62%) report taking part in activities in their local community, higher than the average of 55% for the region overall. Most commonly these were 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

 **47%** ATTEND LOCAL COMMUNITY EVENTS
higher than in the region overall (39%)

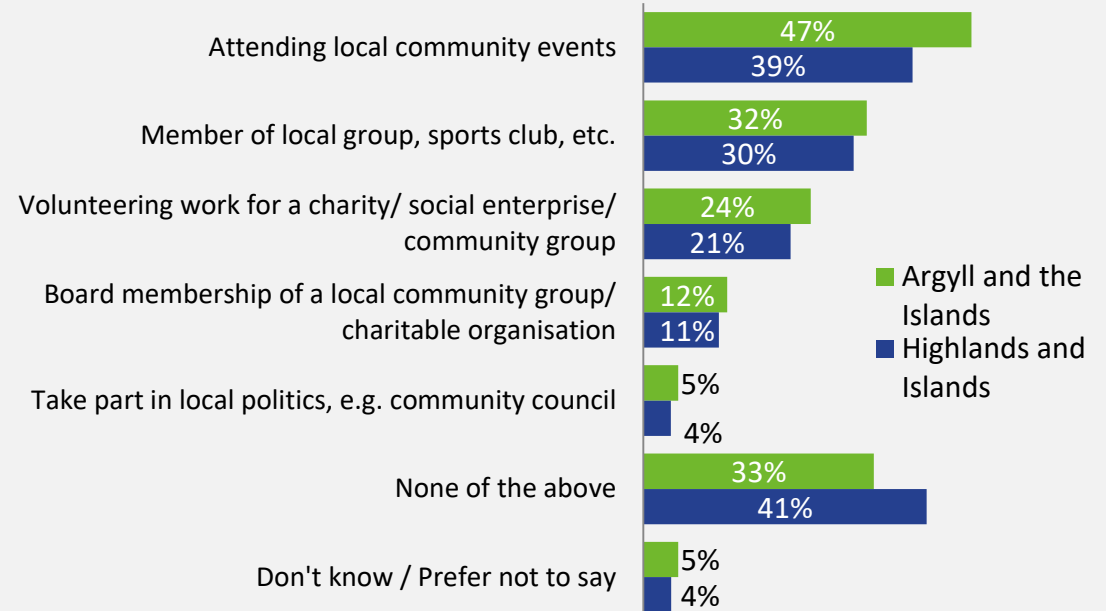
 **32%** ARE MEMBERS OF LOCAL GROUPS OR SPORTS CLUBS

 **24%** VOLUNTEER

 **12%** ARE BOARD MEMBERS

PRIDE
91% ARE PROUD TO LIVE IN ARGYLL AND THE ISLANDS
higher than in the region overall (88%)

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



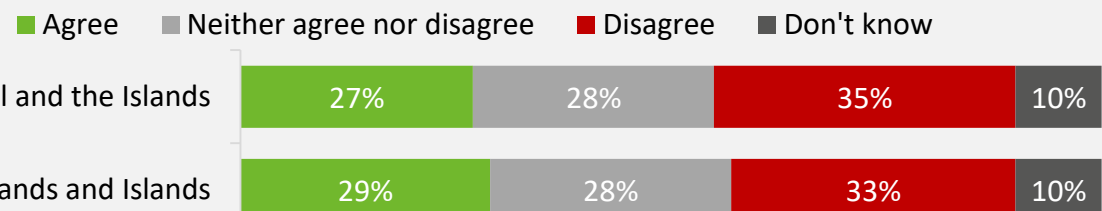
Base: All residents, aged 16+ (5,301), Argyll and the Islands (690) and the Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

Local decision making

 **27%** AGREE THAT LOCAL PEOPLE CAN INFLUENCE DECISION MAKING IN THEIR LOCAL AREA

35% DISAGREE

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+ (5,301), Argyll and the Islands (690) 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 Argyll and the Islands are electricity, wood/biomass and oil, with the use of wood/biomass higher than in the Highlands and Islands overall. Air source heat pumps (8%) are the most commonly used green technology for home heating, similar to the region overall. Fewer than one in ten currently have, or plan to buy or lease an electric car.



Dwelling types

Households in Argyll and the Islands are most likely to live in a detached (44%) or semi-detached house (22%). More households live in a purpose built flat (14%) or converted flat (5%) compared to the Highlands and Islands overall (8% and 1% respectively).



Electric cars

7% of households in Argyll and the Islands own or lease an electric or hybrid car, and 6% plan to buy or lease one (both in line with the region overall at 7% and 6% respectively). Just over a quarter (27%) have thought about buying an electric/hybrid car and decided against it, while 26% have not yet made a decision (26% and 24% regionally).

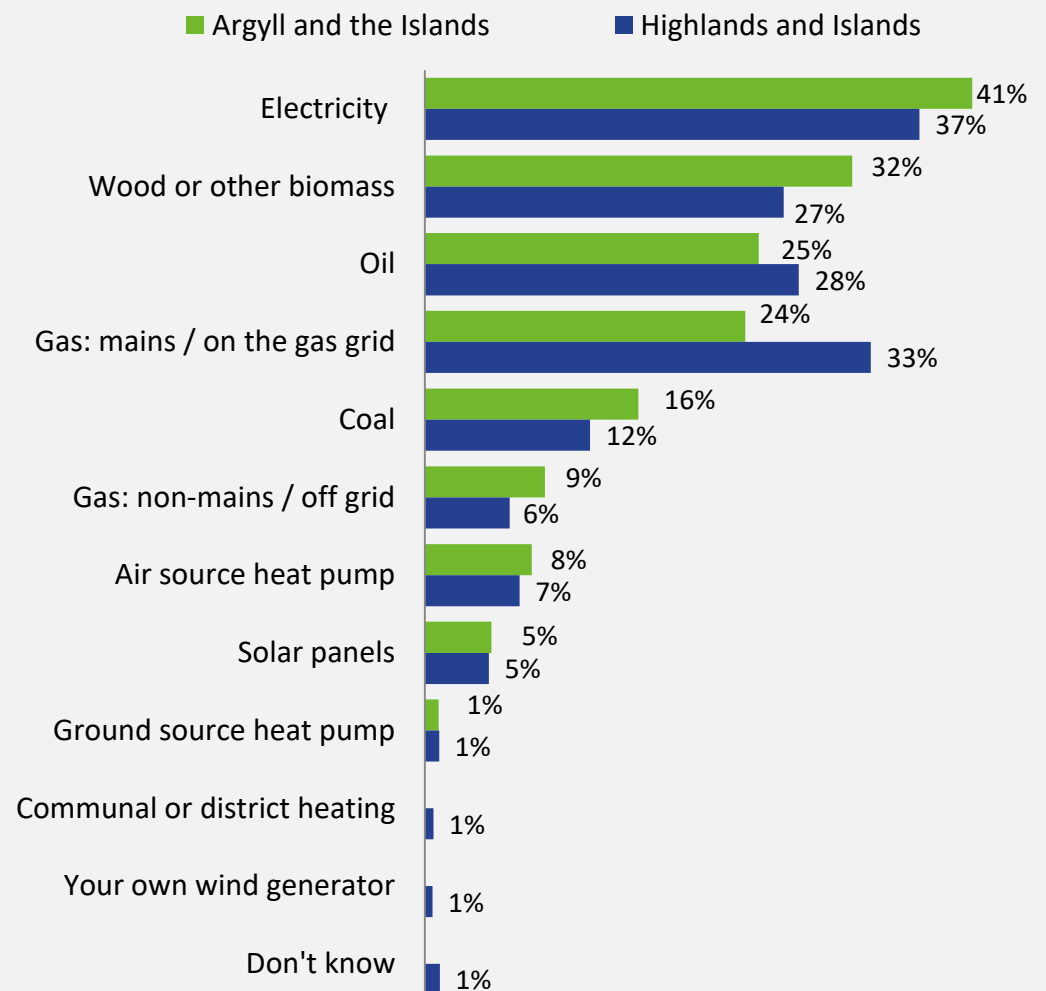
Consistent with the region overall, cost (83%), range (81%) and availability of public charging points (77%) are key concerns in relation to owning or leasing electric or hybrid cars (85%, 80% and 76% respectively regionally).

57% of households would find it difficult to charge an electric vehicle on the street or at a car park, in line with the region overall (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 Argyll and the Islands (582) and the Highlands and Islands (4,442); fieldwork = 28 January - 25 March 2022

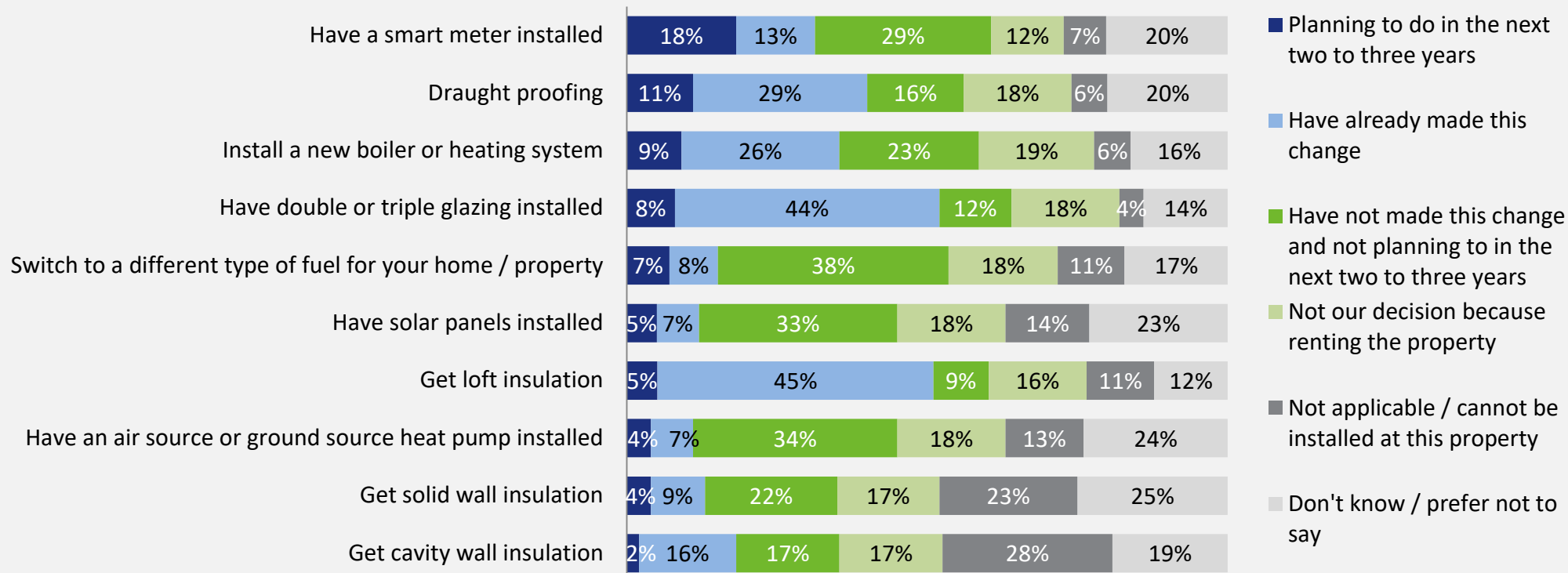
TOWARDS NET ZERO – ENERGY EFFICIENCY IMPROVEMENTS

Almost two in five households (38%) in Argyll and the Islands are planning to make energy efficiency improvements in the next two to three years, similar to the region overall. The most commonly planned actions are having a smart meter installed (18%), draught proofing (11%) and installing a new boiler or heating system (9%).

Among households who are not planning to switch fuel type, the main reasons are: because it is too expensive (52%), there is not enough financial support (32%), and not wanting to change (30%).

38% OF HOUSEHOLDS IN ARGYLL AND THE ISLANDS 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 Argyll and the Islands (582); fieldwork = 28 January - 25 March 2022

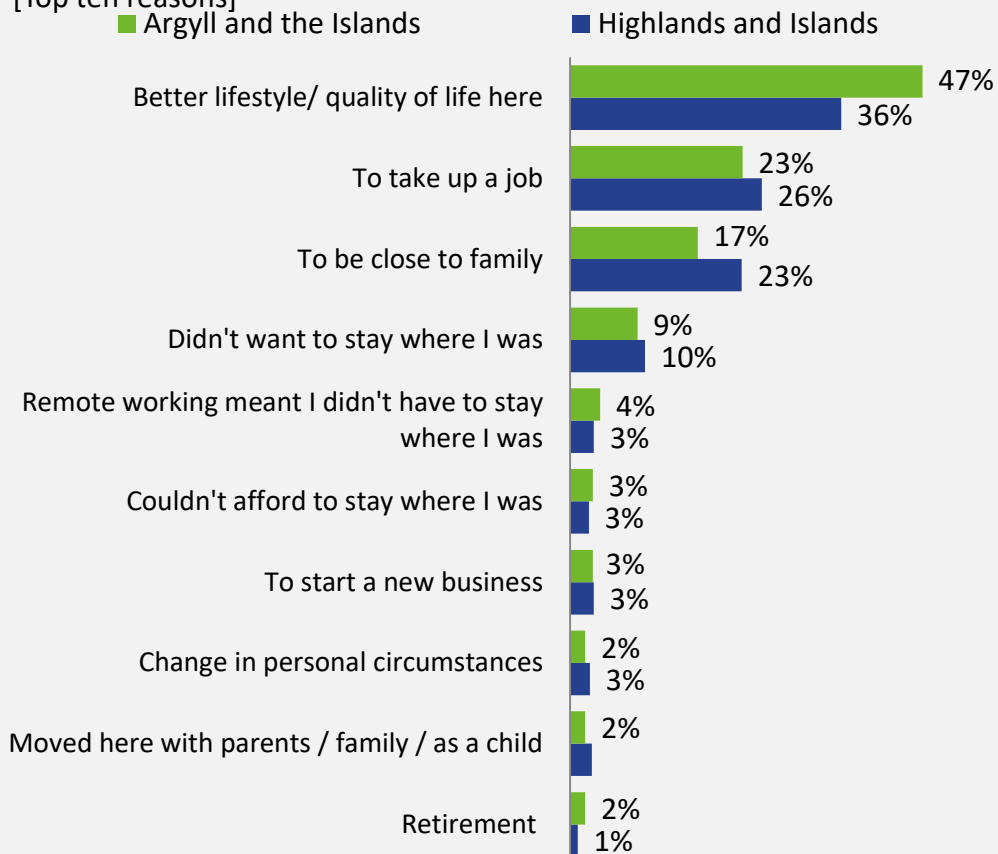
POPULATION MOVEMENT AND MIGRATION TO THE AREA

Among residents of Argyll and the Islands 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, higher than the average overall. However, they were less likely than average to say they moved to be close to family.

Households in Argyll and the Islands are more likely than average to say that most of the people who move to their local area are retired, that people are moving to their area because they can work from home, and that people are leaving their area because they can't find work. Less than a quarter agree that people are moving to their local area for new job opportunities, lower than 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 Argyll and the Islands (528) and the Highlands and Islands (3,449); fieldwork = 28 January - 25 March 2022

Among those in Argyll and the Islands who have not always lived in the region:



47% say they moved there for better lifestyle/quality of life, higher than the region overall



17% say they moved to be close to family, lower than the region overall

Among all households in Argyll and the Islands:

72% say most of the people who move to their local area are retired, higher than the region overall at 56%

61% say people are leaving their local area because they can't find work, higher than the region overall at 47%

47% say new businesses are starting up in their local area, in line with the region overall at 46%

23% 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 Argyll and the Islands to thrive are: housing for local families, more job opportunities and more working age people moving into the area. These are all higher priorities for Argyll and the Islands residents than they are for those in the Highlands and Islands overall.

Optimism

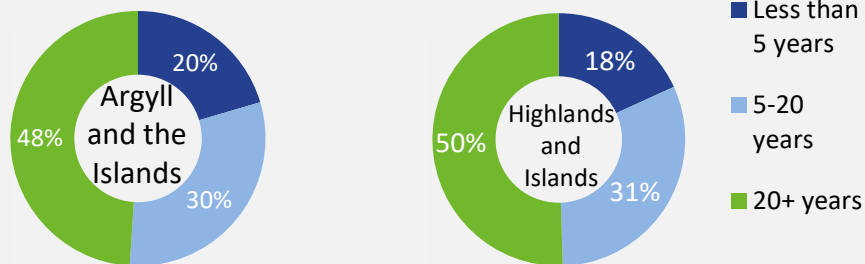
51% of Argyll and the Islands residents are optimistic about their community (52% regionally). Meanwhile 20% are pessimistic, higher than in the region overall (16%).

Length of residence and future intentions

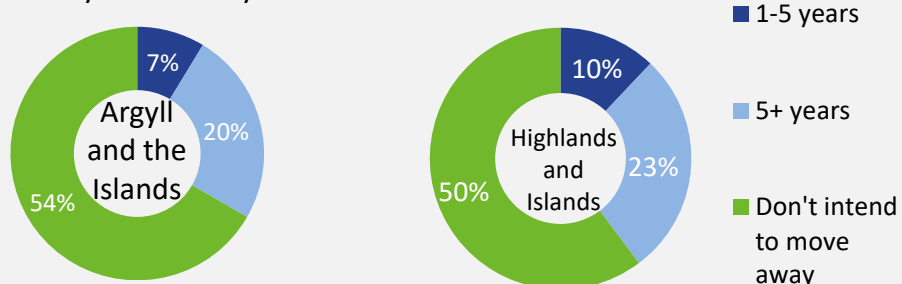
48% of Argyll and the Islands residents have been living in their local area for more than 20 years. 30% have lived there for between 5 and 20 years and 20% for less than five years – in line with the region overall.

In terms of future intentions, 54% 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?

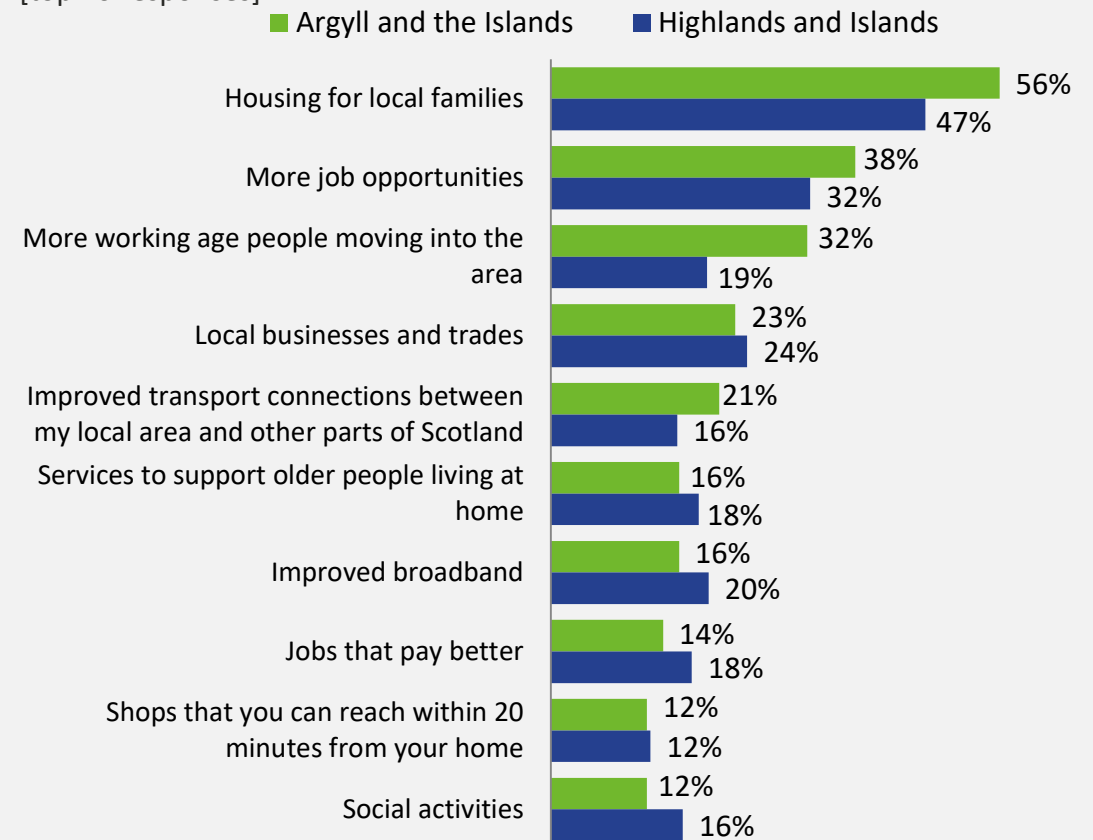


Base: All residents, aged 16+ in Argyll and the Islands (690) and the Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

Priorities

Housing for local families (56%), more job opportunities (38%), more working age people moving into the area (32%) and improved transport connections with other parts of Scotland (21%) are higher priorities for communities in Argyll and the Islands, compared to the region overall.

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



Base: All residents, aged 16+ in Argyll and the Islands (690) 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, Inness 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%.

690 interviews were achieved in Argyll and the Islands.

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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