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National Islands Plan Survey Final Report

AGRICULTURE, ENVIRONMENT AND MARINE

social research

The National Islands Plan Survey

Final Report

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The views expressed in this report are those of the researchers and do not necessarily represent those of the Scottish Government or Scottish Ministers.

Contents

List of figures

List of tables

Highlights

What is the report about?

The Scottish Government developed Scotland's National Islands Plan (2019) following the Islands (Scotland) Act 2018. This plan aims to improve people's lives in Scotland's islands. The National Islands Plan Survey gathered data with a view to collecting information about people's lives against which we'll measure the effectiveness of the Plan.

What did we do?

In October 2020, 20,000 surveys were posted to adult residents of 76 permanently inhabited islands, with options to complete it on paper, online or by phone, and in English or Gaelic. A total of 4,347 people responded to the survey from 59 islands, giving a response rate of 22%.

What did we learn?

Survey findings highlight that experiences of island life vary considerably by island group and by age groups.

Respondents feel there is a lack of support for young people to remain, move or return to the islands. The data reveals that respondents feel there are a lack of employment, training and higher education opportunities and a lack of childcare options to fit with residents' working patterns. Respondents also feel there is a poor variety of housing types, sizes and tenures to meet people's needs and a lack of affordable housing. Respondents also have mixed experiences of accessing healthcare services and of speed and reliability of internet connections. Some feel there is inadequate infrastructure for the number of tourists their islands attract.

The National Islands Plan Survey has significantly improved the availability of data held about Scotland's islands. It has provided baseline data against which to measure the effectiveness of the Plan.

An interactive data explorer can be found.This allows you to explore the data by island region, age group, gender, household income, long term health condition/disability, and household type.

What needs to change in the future?

Changes need to be made about assumptions that are sometimes made about Scotland's island residents. Just one in five island respondents works in more than one paid job or business; Scottish Gaelic and Orkney and Shetland dialects are spoken more widely among young respondents than older respondents; and the majority of respondents plan to stay on their island for at least the next five years.

What do we recommend?

Any recommendations or polices should recognise that life is considerably different in each island group and that different age groups, too, have distinct experiences of island life. Therefore tailoring to each island group and different age groups seems appropriate.

Executive Summary

The Scottish Government developed the National Islands Plan following the Islands (Scotland) Act 2018. The National Islands Plan aims to improve life in Scotland's islands. This plan sets out 12 objectives for improving outcomes for island communities across Scotland. The National Islands Plan Survey gathered data relating to these objectives, with a view to:

- improving the availability of data held about Scotland's islands
- measuring aspects of the National Islands Plan consistently within and across Scotland's island communities
- providing baseline data against which to measure the effectiveness of the Plan

The National Islands Plan Survey gathers the views of island residents to improve the islands' evidence base and help measure progress towards the Plan's strategic objectives.

Methods

In October 2020, 20,000 surveys were posted to adult residents of 76 permanently inhabited islands, with options to complete it on paper, online or by phone, and in English or Gaelic. A total of 4,347 people responded to the survey from 59 islands, giving a response rate of 22%.

General observations

Survey findings highlight that experiences of island life vary considerably by island group. Differences are particularly striking between residents of Orkney Mainland and Outer Isles, and Shetland Mainland and Outer Isles, with “mainland” islanders generally more positive about a range of measures. These differences may be attributable to proximity to a small town (associated with access to services and more diverse economies) and direct access to mainland Scotland from the “mainland” islands, unlike in the outer islands.

The findings show that different age groups, too, have distinct experiences of island life, and a young person’s views can contrast with those of an older person living in the same island group. This is especially true of perceptions of opportunities for population growth and economic development, about which younger respondents are more positive.

A number of the survey findings appear to contradict assumptions that are sometimes made about Scotland's island residents. Just one in five island respondents works in more than one paid job or business, Scottish Gaelic and Orkney and Shetland dialects are spoken more widely among young respondents than older respondents, and the majority of respondents plan to stay on their island for at least the next five years.

More detailed findings on each of the main topics are below.

Population

Most islanders say they plan to stay on the island for the next five years but report that it is not easy for young people to live and work in their local area, with some variation between island groups. Perceptions are more positive in Orkney and Shetland Mainlands and substantially more negative in Skye and the Small Isles, and Arran, Bute and the Cumbraes. Younger islanders tend to be more positive than older islanders, although the majority of all age groups perceive that it is not easy.

Access to crofting is generally felt to be difficult, with low availability of croft tenancies and dissatisfaction with the support available for crofters.

Sustainable economic development

Perceptions of the availability of jobs in fishing, agriculture, forestry, tourism and renewables, as well as support to find and keep jobs, varied greatly between the island groups. There were large differences reported between Orkney Mainland, Shetland Mainland and their Outer Isles counterparts, with Outer Isles residents generally feeling less positive. Tourism is the sector that islanders feel most positive about.

Younger island residents are more positive than older island residents about the availability of job opportunities across all sectors.

Transport

There was large variation between island groups with respect to the accessibility of island transport, with patterns of use dictated by island location and infrastructure. For example, residents of Shetland and Orkney Outer Isles make greatest use of inter-island ferries, while residents of Mainland Shetland and Mainland Orkney make most use of flights to and from mainland Scotland. Compared to other measures, residents express least satisfaction with fares for both residents and visitors.

Access to buses was reported much more favourably in Orkney Mainland, Shetland Mainland and Lewis and Harris than in Orkney Outer Isles, Shetland Outer Isles and Uist and Barra.

Different patterns of transport use are notable between different age groups, with older people making greater use of local buses and mainland ferries, younger people flying to and from the mainland more often, and middle-aged residents (aged 36 to 50) making more use of inter-island ferries. Older people were more likely to express dissatisfaction with roads, paths and pavements.

Housing

There is strong evidence of dissatisfaction with housing among respondents, with perceived poor availability of housing – and affordable housing – in many islands.

In contrast, the majority of island groups reported high proportions of holiday and second homes.

Fuel poverty

The majority of island residents reported that their heating bills had increased in the past year. While most said that they could afford to keep their home warm, a significant minority could not and some had to choose between food and heating.

Digital connectivity

The majority of respondents could access the internet from home. However, speed and reliability of internet connections are an issue for many, particularly in Orkney and Shetland Outer Isles. Mobile signals vary, with particularly poor reports from Orkney Outer Isles.

Islanders are generally confident in using the internet for most tasks, but slightly less confident in using the internet to attend online health and social care appointments.

Health, social care and wellbeing

There are striking differences in reported levels of access to health, social care and wellbeing services between the island groups. Almost all residents of Orkney Mainland and Shetland Mainland report that they can easily access a hospital, a dentist and a pharmacy. However, substantially fewer residents of Orkney Outer Isles and Shetland Outer Isles report this. Argyll Islanders report notably lower satisfaction with local sports facilities than other island groups.

Perceived access to mental health services is low, with a large degree of uncertainty about what services are available.

Environmental wellbeing and climate change

Islanders rate their local environment very highly, and high proportions engage in pro-environmental behaviours, notably buying food locally and generating their own renewable energy, which is particularly common in the Orkney Outer Isles. Lower proportions of residents report that the local environment is clean and litter-free, however, and the ability to dispose of bulky household waste is a particular issue in the outer islands of Orkney and Shetland.

Communities

Islanders, particularly young islanders, have a greater sense of empowerment within their own communities than they do at regional or national level. Island residents generally have a strong sense of belonging to their local area, but sense of community is stronger in some areas than others.

Arts, culture and language

Experiences of culture and language vary considerably across island groups, age groups and genders, with different patterns of cultural participation and perceptions of the extent to which island culture is supported. Of note, residents of Orkney Mainland and Shetland Mainland are most likely to feel that there is investment in cultural and historic places, and that islanders' creative talents are supported and nurtured.

Those who speak Gaelic have mixed views on how much they are able to use the language in their community, with residents of Lewis and Harris most likely to report that they can use Gaelic in a range of situations. Younger people are more likely to speak and understand Gaelic than older people.

Education

Perceptions of the quality of education available locally are very positive with regard to primary education but decrease notably in some islands in relation to secondary education, likely due to limited subject availability. Agreement rates with respect to college and university education and professional qualifications are successively lower, with more positive perceptions among those living in island groups where there are small towns.

1. Introduction

Scotland's National Islands Plan (2019) was developed following the Islands (Scotland) Act 2018 and sets out a series of objectives for improving outcomes for island communities across Scotland. The National Islands Plan Survey gathered data relating to these objectives, with a view to:

- improving the availability of data held about Scotland's islands
- measuring aspects of the National Islands Plan consistently within and across Scotland's island communities
- providing baseline data against which to measure the effectiveness of the Plan

The strategic objectives are as follows:

1. To address population decline and ensure a healthy, balanced population profile
2. To improve and promote sustainable economic development
3. To improve transport services
4. To improve housing
5. To reduce levels of fuel poverty
6. To improve digital connectivity
7. To improve and promote health, social care and wellbeing
8. To improve and promote environmental wellbeing and deal with biosecurity
9. To contribute to climate change mitigation and adaptation and promote clean, affordable and secure energy
10. To empower diverse communities and different places
11. To support arts, culture and language
12. To promote and improve education for all throughout life

This report describes the survey, methods, findings and conclusions.

2. Methodology

A large proportion of the island population is situated in a small number of islands, and there are many islands with very low or zero population. Nine subregions were defined, and used to calculate the sample, based on the combination of subregion, gender and age group.

The final sample therefore covered the maximum number of islands possible, with clear consideration of representativeness based on age group, gender and subregion (18 to 75) population.

20,000 surveys were sent to 76 individual islands. 4,347 people responded to the survey, with an overall response rate of 22%.

Responses have been weighted based on population structure, to ensure representativeness.

An important aim of the survey was to gather responses from as many permanently inhabited islands as possible, and to reach a representative sample of adult residents (aged 18 and over) in terms of age, gender and island group. The survey only targeted island residents and excluded users of holiday or second homes who are resident elsewhere.

The survey was sent to 20,000 island residents in October 2020 and asked about their perceptions of aspects of island life, including population levels, economic development, transport, housing, fuel poverty, digital connectivity, health and social care, environmental wellbeing, community empowerment, and culture and education. Respondents could complete the survey by post, online or by phone, and in English or Gaelic. The survey was formally open until 23 November 2020 but responses continued to arrive throughout December. All responses received until 4 January 2021 have been included in the analysis.

4,347 people responded to the survey (4,147 or 95% by post, 3 or 0.1% by phone and 197 or 5% online including 7 in Gaelic). This report summarises the main findings. More detailed summary data will be available through a publicly accessible online tool, to be launched in July 2021.

2.1 The survey framework: subregions and sampling design

The geography of the Scottish islands is complex and presents challenges for conducting social research. A large proportion of the island population is situated in a small number of islands, and there are many islands with very low or zero population. Furthermore, the sparse population of the region creates issues in acquiring data on the location of people and demographic characteristics. An important part of the survey framework was the definition of a set of custom island-based subregions – appropriate geographical groupings of islands allowing for an understanding of spatial differences in characteristics and perceptions. The following is a simplified description of the sampling process.

1. The Scottish Postcode Directory, produced by National Records of Scotland (NRS), contains an index of information on ‘small user’ postcodes, and parts of split postcodes. This, and other NRS data (Census Indexes, Geography metadata from the postcode directory, and information on the recent 'Islands 2020' definition) were used to identify postcodes or parts of split postcodes which were a) in the six council areas of interest (that is, Argyll and Bute, Na h-Eileanan Siar, Highland, North Ayrshire, Orkney Islands and Shetland Islands), b) not located on the Scottish mainland, or on islands on mainland lochs, and c) active (not deleted) and either populated in the 2011 Census, or introduced in 2011 or after. The resulting list of postcodes provided a proxy for the location of people on islands in 2020. The lookups to and between other geographies (including NRS Island Groups, based on Output Areas and used for reporting 2011 Census data), and ‘Islands 2020’ - individual islands identified by NRS in 2020) formed the basis of the subregion definition and sampling.

2. A lookup between Census Output Areas and Island Groups was used to create draft subregions for consideration by the Research Advisory Group[1]. Suggested changes included the re-definition of the Orkney and Shetland subregions to group ‘connected’ islands with the Mainland islands.

3. The final series of subregions were then produced (Table 1 and Map 1, below). For local authorities outside of Orkney and Shetland, subregions were based on Island Groups which contained potentially populated postcodes. In Orkney and Shetland, to ensure an accurate division between the ‘Mainland and connected’ and outer islands, subregions were based on individual islands containing postcodes which may be populated. Spatial data - NRS Island boundaries and Ordnance Survey data - were used to define the Orkney and Shetland subregions.

4. A list of potentially populated postcodes was provided to Experian, who produced a list of over 24,000 names and addresses with accompanying gender and age group data for each person. Experian do not hold the names and addresses of people aged over 75, meaning that the 18 to 75 population was used for the survey sample.

5. Lookups, population totals and demographic characteristics were calculated for sampling, partly using Census 2011 data. For each individual island, a lookup to the appropriate subregion, the total population of the island (based on postcode-level data), and the estimated population aged 18 to 75 were produced. For each subregion, the total population and 18 to 75 population were calculated and adjusted, and the population structure (the proportions of the 18 to 75 population within eight cohorts defined by age group and gender) were calculated.

[1] The Research Advisory Group was set up to guide the development of the survey through local knowledge. It comprised representatives from the Scottish Government's Islands Team, the Scottish Islands Federation, Highlands and Islands Enterprise, CoDeL and Scottish Rural Action.

6. The total number of surveys required for each subregion was calculated, based on 20,000 surveys being distributed in proportion to the 18 to 75 population size within each subregion, and the number of surveys required for each demographic cohort was then calculated using the population structure information. The resulting 72 totals of surveys for combinations of subregion, gender and age group represent ‘targets’ for a representative, stratified sample.

Table 1. Island subregions used in this survey

Island Group	Island
Argyll Islands	Coll, Colonsay, Easdale, Gometra, Iona, Islay, Isle of Gigha, Isle of Mull, Jura, Kerrera, Lismore, Luing, Oronsay, Seil, Tiree, Ulva
Arran, Bute and the Cumbraes	Bute, Great Cumbrae Island, Isle of Arran
Lewis and Harris	Great Bernera, Isle of Lewis and Harris, Scalpay
Orkney Mainland	Burray, Mainland of Orkney, South Ronaldsay
Orkney Outer Isles	Eday, Egilsay, Flotta, Graemsay, Hoy, North Ronaldsay, Papa Stronsay, Papa Westray, Rousay, Sanday, Shapinsay, Stronsay, Westray, Wyre
Shetland Mainland	East Burra, Mainland of Shetland, Muckle Roe, Trondra, West Burra
Shetland Outer Isles	Bressay, Bruray, Fair Isle, Fetlar, Foula, Housay, Papa Stour, Unst, Whalsay, Yell
Skye and the Small Isles	Canna, Eigg, Eilean Tioram, Isle of Ewe, Isle of Raasay, Isle of Skye, Muck, Rona, Rùm, Sanday, Soay
Uist and Barra	Baleshare, Barra, Benbecula, Berneray (North Uist), Eriskay, Grimsay (North), Grimsay (South), North Uist, South Uist, Sunamul, Vatersay

7. The table of names, addresses and age group and gender data from Experian were joined to the individual island and subregions using the partially populated postcodes, following manual checks of some postcodes against OS and web mapping. Finally, 23,990 names, addresses and data were available for sampling.

8. Names and addresses were selected for sampling based on the individual island they were located on, and the combination of subregion, gender and age group noted above – before the sample selection, these combined cohorts were calculated for each name and address and the total number of names and addresses within each cohort was identified. However, to ensure that surveys reached all possible islands (76), and to increase the

likelihood of responses from smaller/less populated islands, the individual islands were considered first. Firstly, for islands where less than 10 names and addresses were available, all names and addresses were included in the sample (based on the assumption of a 10% response rate). Secondly, we calculated the expected number of surveys that would be delivered to each island if surveys were distributed evenly, given that a sample size of 20,000 represents around 27% of the island population aged 18 to 75. Where this number was below 20 we sampled all available names and addresses as in these cases there was a significant risk that we would not receive any responses given that we expected the response rate may be as low as 10%. The subregion, gender and age group cohorts of names/addresses sampled in these first two steps were subtracted from the initial totals, and the third stage of the sampling process used these cohorts.

9. For each of the 72 cohorts, if the number of available names and addresses was below its 'target' for a representative, stratified sample in the sampling frame, all names and addresses associated with that cohort were sampled. If the number of names and addresses was above the target then a random sample of these was taken. The fourth and final stage of the sampling involved a comparison across the subregions of all names and addresses sampled in the first three stages, with the target number for each subregion (based on 20,000 surveys distributed to the nine subregions in proportion to the size of the 18 to 75 population). Names and addresses were randomly sampled from those remaining as a 'top up' based on the numbers required to meet the nine subregion targets and the subregions of the remaining names and addresses. These stages produced a sample of 20,009 names and addresses: nine within the Uists and southern islands were removed at random as that subregion was over-sampled relative to its target number of surveys.

The final sample of 20,000 names and addresses therefore covered the maximum number of islands possible, with clear consideration of representativeness based on age group, gender and subregion (18 to 75) population. A random, unique five-digit ID number was added to each name and address in the final sample. This was included on the cover of paper surveys, and online survey forms contained an input field for this value, which enabled survey responses to be joined to the individual island and subregion information.

2.2 Who responded to the survey?

The data sets containing returned paper questionnaires and online questionnaires were cleaned and combined. The cleaning task involved checking numeric responses and ID values, checking for duplicate IDs, flagging invalid survey responses, considering informed consent on online surveys and calculating new variables for 'tick all that apply' questions. The sampling information, including individual islands and subregions, was joined to the survey responses using the ID.

Following cleaning and combination of postal and online questionnaire survey data sets, the final data set contained 4,372 cases. Of these, 25 surveys contained no valid responses to any survey question (that is, questions 1 to 46, excluding the ID, consent information and comments). If these are excluded, the overall response rate is 22% from 20,000 distributed questionnaires. Response rates to the individual questions varied, and the full data available for each question is used to produce the summary statistics in this report.

The age and gender of survey respondents are summarised below, alongside the number of responses received from the nine subregions. Although the sample targeted people aged 18 to 75, 141 responses were received from people aged 76 or older. The mean age of a respondent was 56.1 years old (range: 18 to 98, n = 4,339). Compared with the characteristics of the survey sample, people aged 51 to 65 and 66 to 75 are over-represented in the survey responses, and younger people are under-represented: the estimated response rate increases with age. The survey respondents were relatively balanced in terms of gender, with a slightly higher proportion of women (54%). The response rates by subregion show some variation, with particularly high response rates in the Argyll Islands and Orkney and Shetland Outer Isles.

Table 2. Survey respondents by age, gender and islands group

		Survey sample (20,000 surveys)		Survey responses (n = 4,347)	Estimated group response rate	
Variable	**Group**	**n**	**% (1 d.p.)**	**n**	**% (1 d.p.)**	**% (1 d.p.)**
Age	18 to 35	4256	21.3	492	11.3	11.6
	36 to 50	5688	28.4	893	20.6	15.7
	51 to 65	6519	32.6	1617	37.3	24.8
	66 to 75	3537	17.7	1196	27.6	33.8
	76 and over			141	3.2	
Gender*	Female	10086	50.4	2341	54.0	23.2
	In another way			2	0.0	
	Male	9914	49.6	1978	45.6	20.0
	Prefer not to say			15	0.3	
Island group	Argyll Islands	1677	8.4	440	10.1	26.2
	Arran, Bute and the Cumbraes	2409	12.0	585	13.5	24.3
	Skye and the Small Isles	2038	10.2	449	10.3	22.0
	Lewis and Harris	4117	20.6	830	19.1	20.2
	Orkney Mainland	3586	17.9	630	14.5	17.6
	Orkney Outer Isles	549	2.7	160	3.7	29.1
	Shetland Mainland	3799	19.0	805	18.5	21.2
	Shetland Outer Isles	632	3.2	179	4.1	28.3
	Uist and Barra	1193	6.0	269	6.2	22.5

* For the survey sample, these are based on information provided by Experian. For the survey responses, these are the values given or responses selected in the survey.

In addition to the subregion-level response breakdown, surveys were posted to 76 individual islands, the highest number of islands possible from available names and addresses. Surveys with valid responses were received from 59 islands, showing success in survey distribution at this level. The largest four islands by total population (Lewis and Harris, the Mainland islands of Orkney and Shetland, and Skye and Highland Islands) had 65% of the population of all 76 sampled islands, received 65% of all surveys, and 60% of all returned surveys were from these four islands, collectively. Survey responses were received from the vast majority of islands (50 out of 54) with a population above 50, although the very small numbers of available names and addresses for the very small islands (with a population of 50 or less) limited survey returns from these islands.

Table 3. Surveys and responses by island population

Total population* of each island	Number of sampled islands	Surveys in final sample	Survey responses	Islands providing survey responses
over 10,000	4	12,953	2,625	4
1,001-10,000	10	4,875	1,157	10
201-1,000	16	1,570	392	13
101-200	14	375	112	14
51-100	10	148	43	9
50 or less	22	79	18	9

* Census 2011 – based on postcode-level data

A large number of individual islands had low numbers of responses: eight islands provided more than 100 survey responses each, but 28 islands returned less than 10 surveys. This emphasises the need to report data at the subregion level. It is notable that the three largest islands (by population) which were sampled but did not return any surveys were in the Orkney Islands (South Ronaldsay, Burray, Rousay). These three islands were allocated 270 surveys in the sample, between them, and this unusual spatial pattern suggests issues with postage or survey distribution in parts of Orkney.

2.3 Weighting of responses

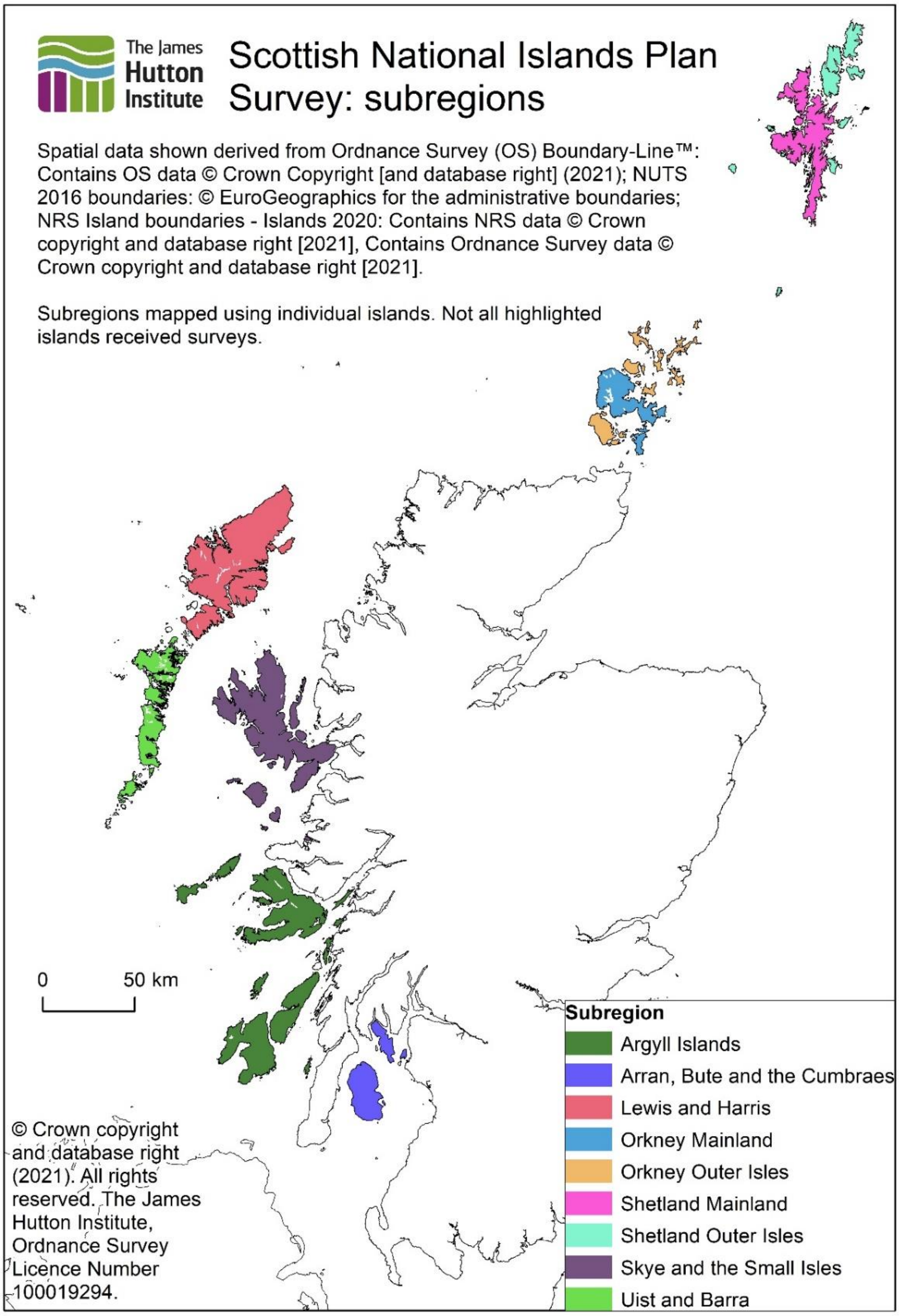
The survey was designed to ensure that the sample was as representative as possible of the combined subregion, gender and age cohorts. However, response rates differed between cohorts with some cohorts (particularly older age groups) being over-represented compared with others (particularly younger age groups). Survey responses were therefore weighted. Weights for the individuals in a particular cohort were calculated by dividing the proportion of the target census population in the cohort by the proportion of the total responses in that cohort. Where possible the stated age and gender of respondents was used as this was considered more reliable than the information in the Experian database. The survey targeted the population aged between 18 and 75 but some respondents stated that their age was greater than 75; these were included with the responses for the 66-75 age group. To calculate the weighted proportion giving a particular answer to a survey question the responses were coded as 1 for those who gave that answer and 0 for those who responded to the question with an alternative answer. Each of these coded responses was then multiplied by the corresponding weight and the sum of the weighted responses was calculated and divided by the sum of the weights.

All percentages cited in this report are based on the weighted data and are rounded to the nearest whole number.

2.4 Analysis

All comparisons described in the text (between different age groups or between islands) are statistically significant at the 95% level or above, unless otherwise specified. This means that the probability of having found a difference of at least this size, if there was no actual difference in the population, is 5% or less. The term 'significant' is used in this report to refer to statistical significance and is not intended to imply substantive importance.

Map 1. Island subregions used for the survey



3. Main findings

3.1 Population

Most islanders say they plan to stay on the island for the next five years but report that it is not easy for young people (under 40) to live and work in their local area, with some variation between island groups.

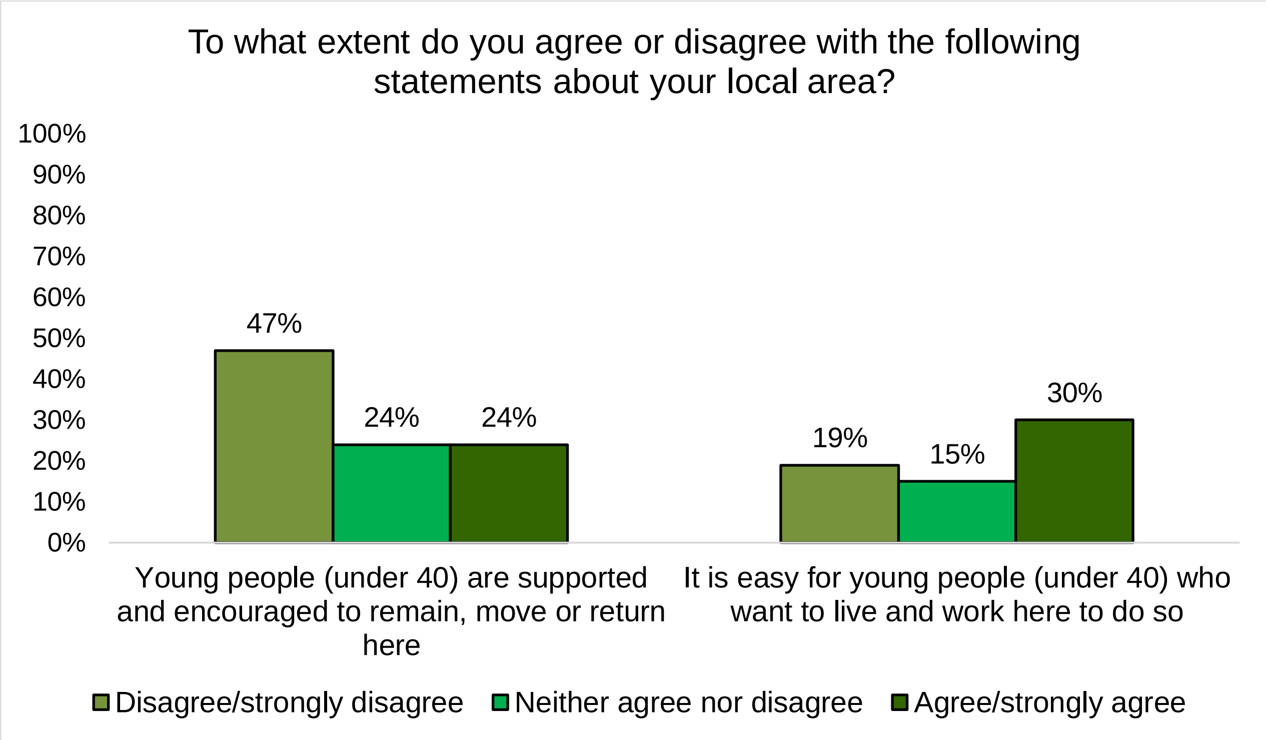
Perceptions are more positive in Orkney and Shetland Mainlands and substantially more negative in Skye and the Small Isles, and Arran, Bute and the Cumbraes. Younger islanders tend to be more positive that it is easy for them to live and work in their local area, significantly more so than older residents.

Access to crofting is generally felt to be difficult, with low availability of croft tenancies and dissatisfaction with the support available for crofters.

3.1.1 Population growth

- 86% of islanders think they are likely to stay on the island for the next five years.
    - Residents of the Shetland Outer Isles are most likely to think they will stay (93%) and residents of Orkney Outer Isles are least likely (79%); however, this was not a significant difference.
    - Young islanders are significantly less likely to say they will stay (71%) compared to other age groups.
- Less than a third of island residents agree that it is easy for young people (under 40) who want to live and work in their local area to do so.
    - More than half of respondents in Orkney Mainland (53%) and Shetland Mainland (52%) agreed with this statement. These are significantly greater when compared to Skye and the Small Isles (13%) and Arran, Bute and the Cumbraes (14%).
    - Agreement with this statement declined with age. 39% of 18 to 19-year-olds agreed that it is easy for young people to live and work in the local area, significantly more than those aged 66 and over (23%).
- A quarter of island residents agree that young people are supported to remain, move or return to the local area.
    - Agreement with this statement was low across all age groups.
    - Orkney Mainland (39%) and Shetland Mainland (37%) had the highest levels of agreement, although not significantly greater than other subregions.

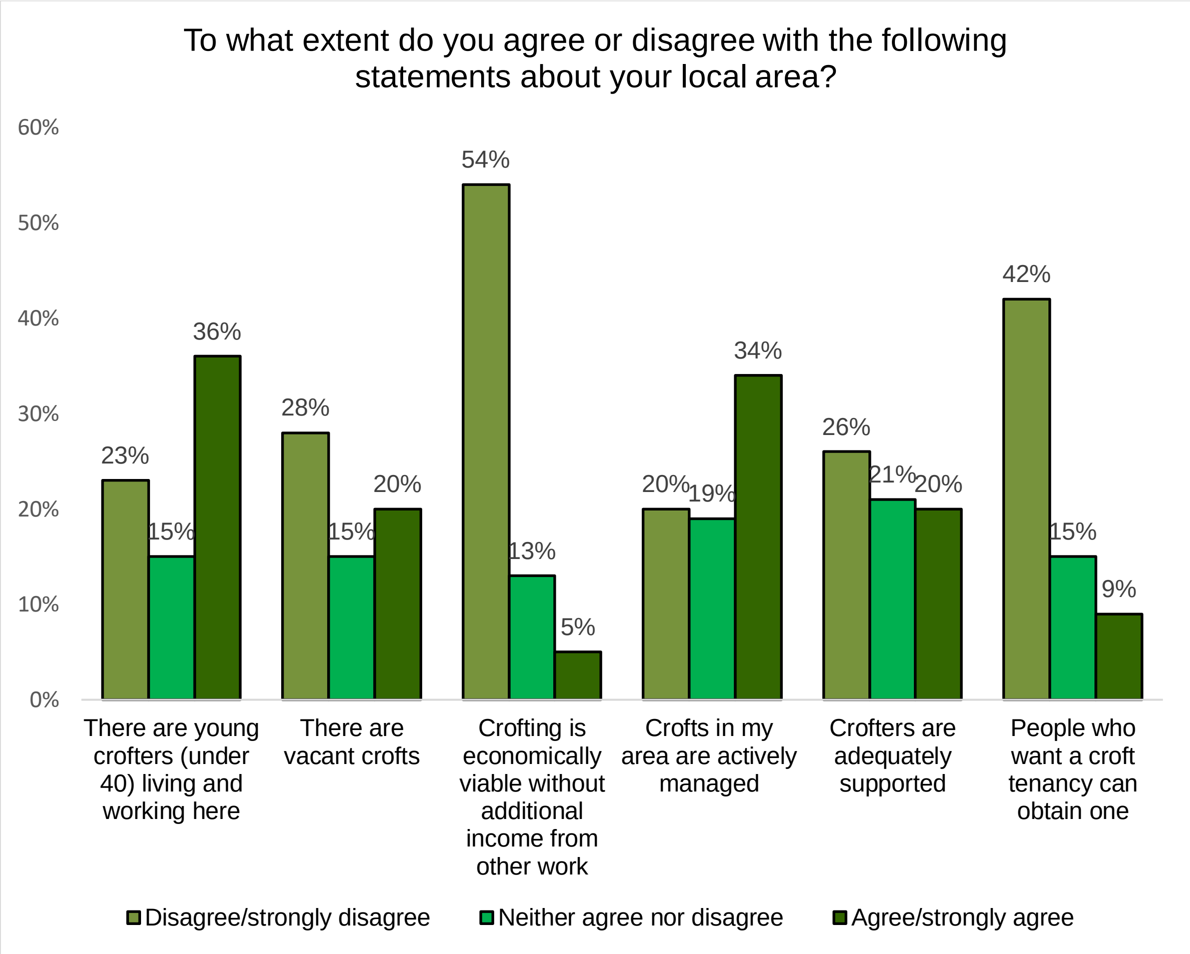
Figure 1. Support for young people to live in and move to the islands



3.1.2 Perceptions of crofting

- 19% of respondents live and/or work on a croft or smallholding, including a significantly greater proportion of respondents from Uist and Barra (41%), Orkney Outer Isles (36%) and Shetland Outer Isles (36%) than the rest of the island subregions.
- 20% of island residents agree that there are vacant crofts in their local area, and 9% agree that people who want a croft tenancy can obtain one.
    - There are significant differences between all regions regarding the availability of crofts. The highest levels of agreement are in Lewis and Harris, where more than half of respondents reported that there were vacant crofts and 22% that croft tenancies are available.
- 20% of islanders agreed that local crofters are adequately supported.
- Some disagreement with these measures may be attributed to lack of crofting knowledge among some respondents.

Figure 2. Crofts are occupied and supported



3.2 Sustainable economic development

Perceptions of the availability of jobs in fishing, agriculture, forestry, tourism and renewables, as well as support to find and keep jobs, varied greatly between the island groups.

There were large differences reported between Orkney Mainland, Shetland Mainland and their Outer Isles counterparts (Outer Isles residents generally feeling less positive).

Tourism is the sector that islanders feel most positive about.

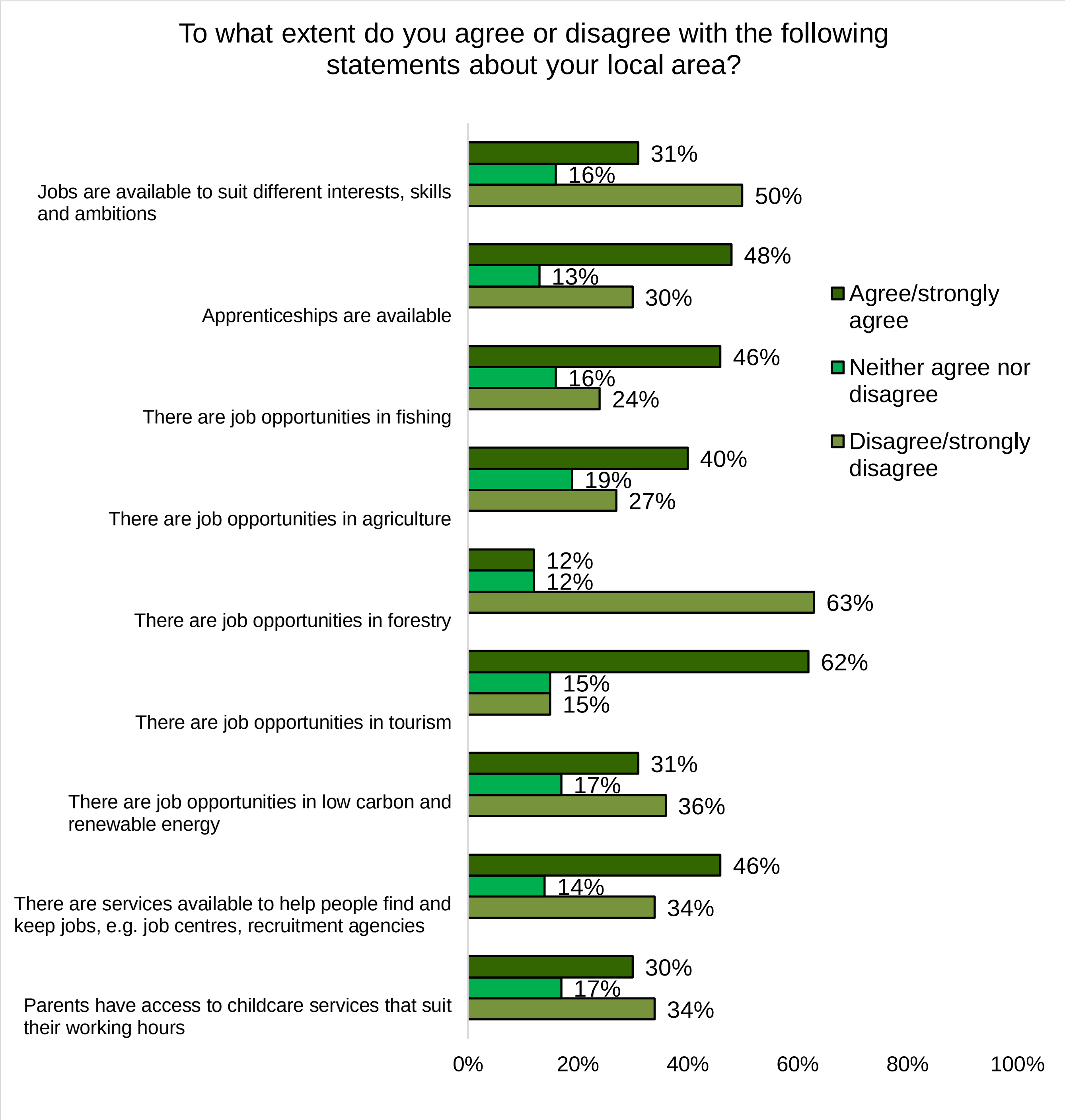
Younger island residents are more positive than older island residents about the availability of job opportunities across all sectors.

3.2.1 Job opportunities and support

- Young people (aged 18 to 35) are significantly more positive about all measures of job availability, compared to other age groups (Figure 3).
- 31% of island residents agree that there are jobs available to suit different interests, skills and ambitions in the local area.
    - A significantly higher level of agreement was reported by residents in Orkney Mainland (59%) than by residents of Orkney Outer Isles (15%). A similarly significant, albeit smaller, difference was noted between Shetland Mainland (42%) and Shetland Outer Isles (20%).
    - Uist and Barra (15%), Skye and the Small Isles (16%), and Arran, Bute and the Cumbraes (16%) also recorded significantly lower agreement compared to the highest subregions.
- 48% of islanders believe that apprenticeships are available.
    - Again, agreement rates significantly varied between Shetland Mainland (61%) and Shetland Outer Isles (32%), and Orkney Mainland (71%) and Orkney Outer Isles (12%).
- Perceptions of the availability of job opportunities in different sectors significantly vary between all island groups. Argyll Islanders were most positive about jobs in fishing and Orkney Mainland residents most positive about jobs in agriculture. Jobs in forestry were felt to be fewer, with Skye and the Small Isles residents most likely to report opportunities.
- 31% of island residents agree that there are job opportunities in low carbon and renewable energy.
    - Highest agreement was reported by residents in Orkney Mainland (76%), whilst the Argyll Islands (6%), and Bute, Arran and Cumbrae (10%) reported significantly lower agreement.
- 46% of island residents agree that there are services available to help people find and keep jobs.

    - Highest agreement was reported by Orkney Mainland residents (73%) whilst the Orkney Outer Isles reported significantly lower levels (15%).
    - Lewis and Harris residents reported 54% agreement while Uist and Barra reported only 17% agreement.
    - Significantly lower agreement was found in the Argyll Islands (9%) than the other islands.
- 30% of island residents agree that parents have access to childcare services that suit their work hours.
    - Argyll Islands (9%) and Orkney Outer Isles (9%) have especially low levels of agreement.

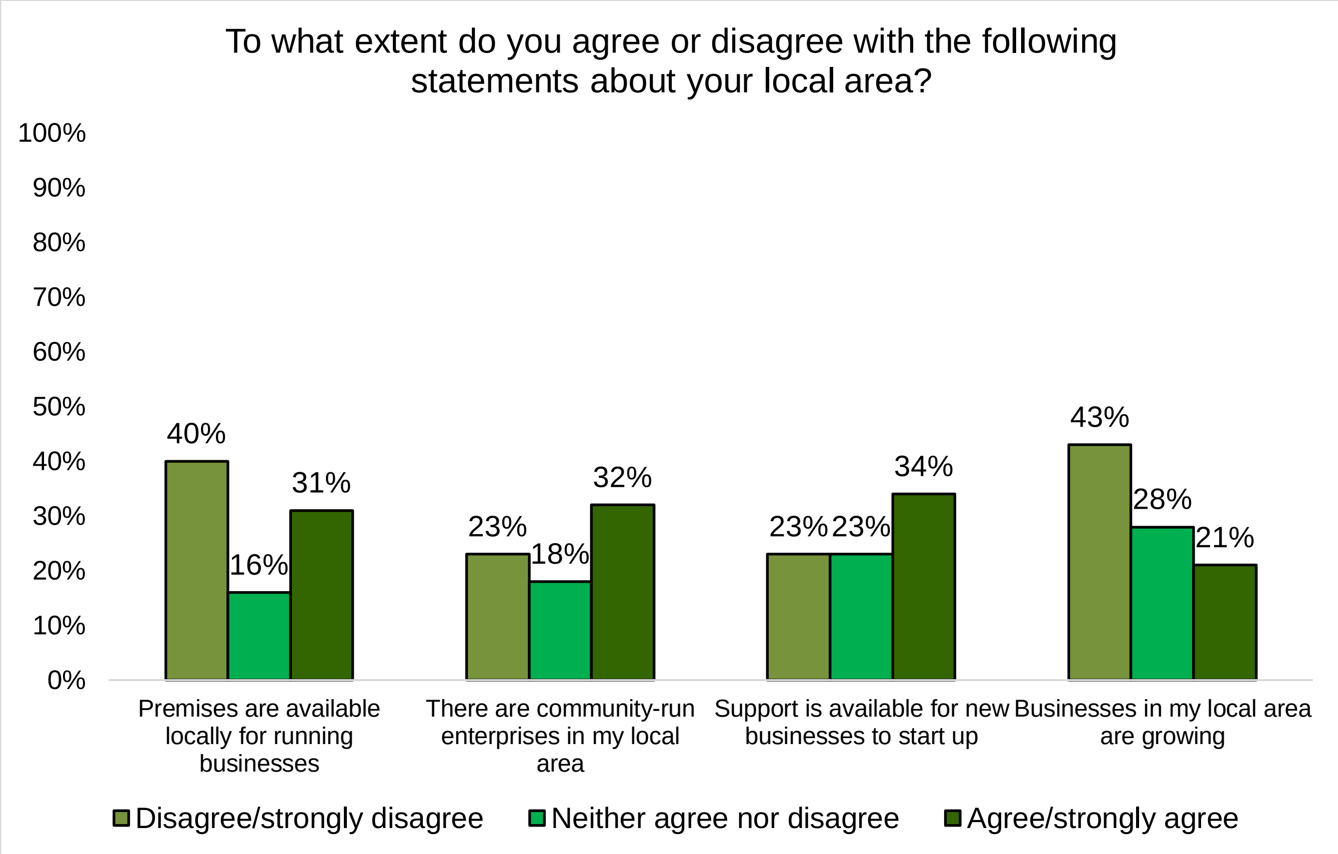
Figure 3. Job opportunities and support



3.2.2 Business opportunities

- 21% of residents perceive that businesses in their local area are growing.
  - Although there was no significant difference between all regions, the lowest agreement was reported in Uist and Barra (14%) and Lewis and Harris (15%).
  - Highest agreement was reported in Orkney Mainland (29%) and Skye and the Small Isles (25%).

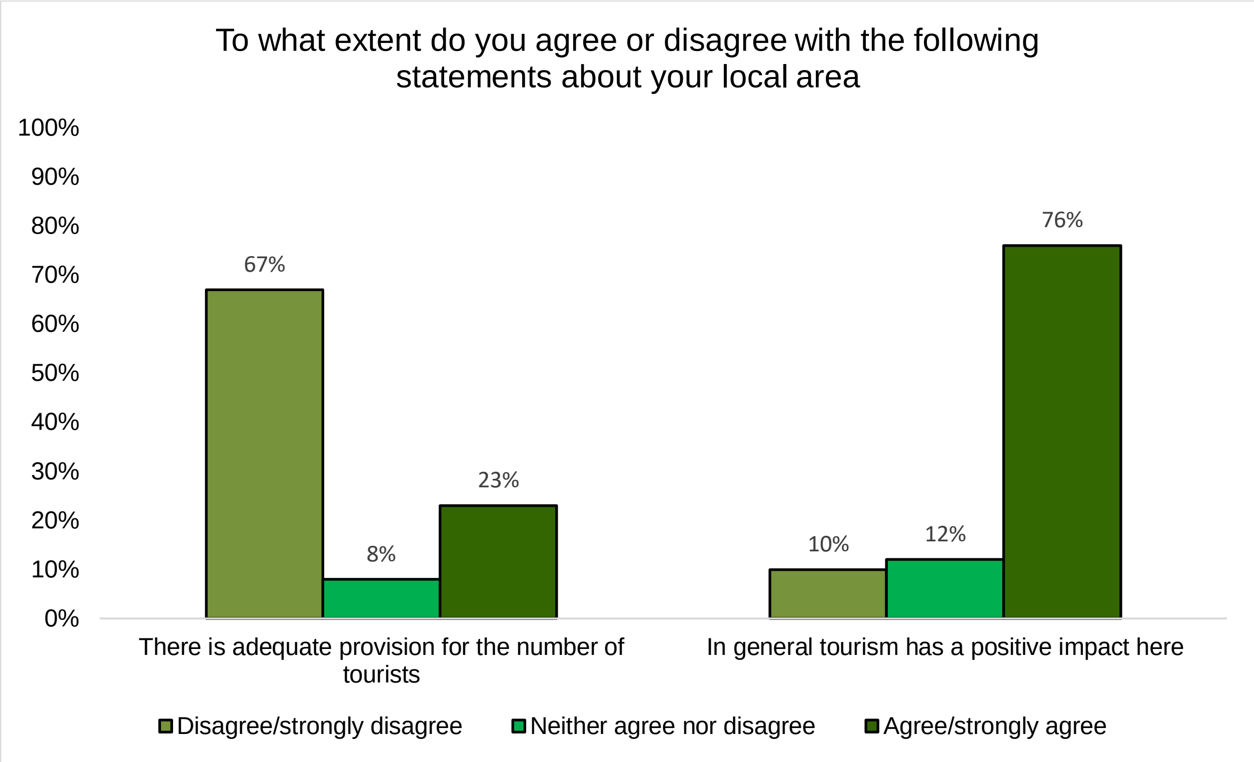
Figure 4. Business opportunities



3.2.3 Tourism

- Tourism was perceived as a source of job opportunities across the islands, with significantly higher perceived availability in Orkney Mainland (81%), Skye and the Small Isles (81%) and Argyll Islands (74%). The lowest level of agreement that jobs are available in tourism was reported by Shetland Outer Isles (30%).
- Around three quarters of islanders perceive that the number of tourists visiting their local area has increased in the past 5 years and that it has a positive impact in their local area. However, a minority of residents (23%) feel that there is adequate provision for the number of tourists, with the significantly lower levels of agreement in Skye and the Small Isles (4%) than other islands.

Figure 5. Impacts of tourism



3.3 Transport

There was large variation between island groups with respect to the accessibility of island transport, with patterns of use dictated by island location and infrastructure.

For example, residents of Shetland and Orkney Outer Isles make greatest use of inter-island ferries, while residents of Mainland Shetland and Mainland Orkney make most use of flights to and from mainland Scotland. Compared to other measures, residents express least satisfaction with fares for both residents and visitors.

Access to buses was reported much more favourably in Orkney Mainland, Shetland Mainland and Lewis and Harris than in Orkney Outer Isles, Shetland Outer Isles and Uist and Barra.

Different patterns of transport use are notable between different age groups, with older people making greater use of local buses and mainland ferries, younger people flying to and from the mainland more often, and middle-aged residents (aged 36 to 50) making more use of inter-island ferries.

Older people were more likely to express dissatisfaction with roads, paths and pavements.

3.3.1 Public transport

General

- Just over a third of island residents say that it is easy to connect between different forms of transport when making journeys to or from their home.
- Arran, Bute and the Cumbraes has higher levels of agreement with this statement (60%), and Uist and Barra has significantly lower levels (9%).

Local buses

- Less than a third of islanders use buses more than once a year, with greatest use in Arran, Bute and the Cumbraes (50%), and significantly less use in Shetland Outer Isles (12%) and Uist and Barra (12%).
    - People aged 66 and over make greater use of local buses compared to 52-65 year olds, with 42% of the 66 and over age group reporting that they use them more than once a year.
- Less than half of islanders agree that the local bus service runs when they need it and that fares are good value for locals and visitors. 52% say the service is reliable and that they can easily find out about routes and times. There are significant differences between all regions, with residents of Uist and Barra least likely to agree with these statements.
- Most island residents (80%) say they can access a bus within walking distance of their home.

  - Residents of Arran, Bute and the Cumbraes (92%) were significantly more likely to agree than other regions.
  - There were also significant differences between Orkney Mainland (88%) and Orkney Outer Isles (36%); Shetland Mainland (84%) and Shetland Outer Isles (43%); and Lewis and Harris (91%) and Uist and Barra (58%)
- 69% of islanders agree that their local bus connects to essential services, with significant differences between Orkney Mainland (81%) and Orkney Outer Isles (25%), and between Shetland Mainland (74%) and Shetland Outer Isles (33%).

Ferries to and from the mainland

- Overall, ferries to and from the mainland are the most frequently used form of transport for islanders.
  - 96% of residents of Arran, Bute and the Cumbraes use mainland ferries more than once a year, and 20% use them more than once a week.
  - Lower levels of use is reported from Skye and the Small Isles, where only 19% of residents use the ferry more than once per year.
  - Across the islands, people over the age of 51 use mainland ferries significantly more frequently than those under 50. 69% of those aged 66 and over use them more than once a year.
- Two thirds of island residents agree that the mainland ferry service runs when they need it, 58% that it is reliable and 64% that there is usually space when they need it. Less than half agree that fares are good value for locals and visitors.
  - Island subregions had significantly different perspectives on reliability, with Arran, Bute and the Cumbraes having the lowest agreement that mainland ferries are reliable (35%).
  - Residents also significantly differ on whether fares are good value, with Shetland Mainland (20%) and Shetland Outer Isles (23%) least in agreement.

Inter-island ferries

- Island residents significantly differ in their use of inter-island ferries.
  - The greatest use of inter-island ferries is made in Shetland Outer Isles, with 98% of residents using inter-island ferries more than once a year and 47% using them more than once a week.
  - Use is also high in Orkney Outer Isles, with 79% of residents using them more than once a year and 22% using them more than once a week.
  - Across all island groups, the 36-50 age group made most use of inter-island ferries, with 51% using them more than once a year.

- Satisfaction with inter-island ferries is highest in Shetland Outer Isles, where 66% of residents say the service runs when they need it, 70% that it is reliable and 78% that there is usually space on board. Agreement drops with respect to fares being good value for residents (36%) and visitors (34%).
    - Satisfaction with inter-island ferries in Orkney Outer Isles is lower, but not significantly. 54% of residents agree that the service runs when they need it, 60% that it is reliable and 59% that there is usually space. Agreement that fares are good value is lower, at 39% for residents and 37% for visitors.

Flights to and from the mainland

- Residents of Mainland Shetland and Mainland Orkney make most use of flights to and from the mainland, with 58% doing so more than once a year. This is significantly greater than residents of Arran, Bute and the Cumbraes, who had the lowest levels of use.
- Across the islands, younger people are significantly more likely to use mainland flights, with 49% of 18 to 35-year-olds using them at least once a year, compared to 27% of those aged 66 and over.
- 55% of island residents agree that mainland flights run when they need them, 45% that the service is reliable and 50% that there is space when they need it. Less than one in five residents feel the fares are good value.

Inter-island flights

- Use of inter-island air services differs across island subregions. The greatest use is in Orkney Outer Isles, with 35% of residents using this service more than once a year, followed by Uist and Barra (23%).
- Satisfaction with inter-island flights is generally low. However, significantly greater satisfaction levels were recorded in Orkney Mainland and Orkney Outer Isles, where 39% and 37% of residents say the service runs when they need it, when compared to the lowest satisfaction rates in Skye and the Small Isles.
- Of those living in Orkney's Outer Isles, 49% say the service is reliable, but less than a quarter of residents say there is space on the service when they need it. 38% feel fares are good value for residents, and just 19% feel they are good value for visitors.

Figure 6. Transport connections

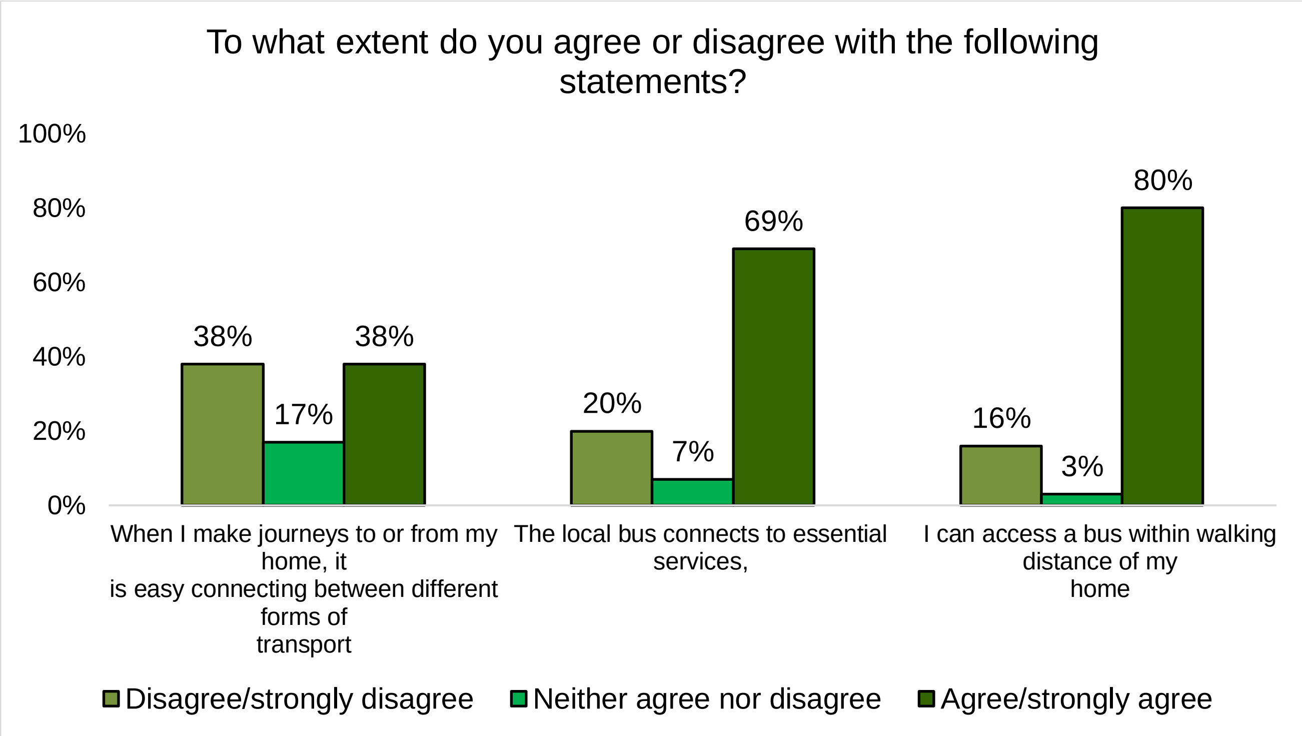


Table 4. Frequency of use of public transport

Thinking about times before COVID-19 and lockdown (before March 2020), how often did you use buses, ferries and planes?					
	Flights to and from the mainland	**Inter-island air services**	**Ferries to and from the mainland**	**Inter-island ferries**	**Buses (on your own or a neighbouring island)**
Service is not available	16%	18%	1%	7%	4%
Never	16%	54%	7%	18%	39%
Less than once a year	12%	12%	9%	16%	16%
Once a year	16%	6%	17%	14%	10%
Several times a year	37%	8%	51%	33%	20%
At least once a month	3%	1%	10%	7%	5%
At least once a week	0%	1%	5%	5%	6%

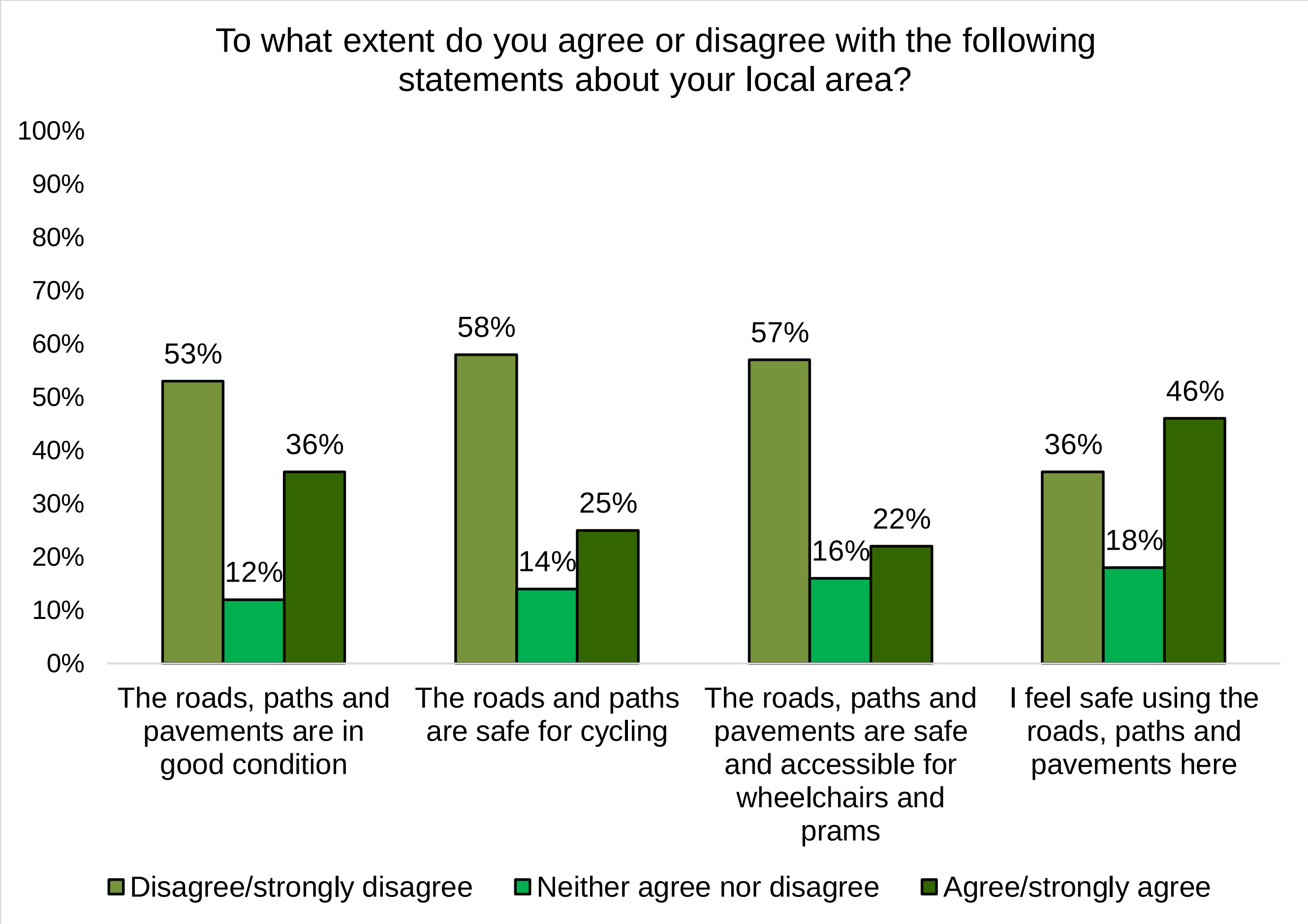
Table 5. Quality of public transport

Which of these statements do you agree with?					
	Flights to and from the mainland	**Inter-island air services**	**Ferries to and from the mainland**	**Inter-island ferries**	**Local bus service**
The service runs when I need it	55%	23%	66%	45%	44%
The service is reliable	45%	22%	58%	45%	52%
There is usually space on the service when I need it	50%	21%	64%	48%	59%
Finding out about routes and times is easy	62%	33%	77%	54%	52%
The fares are good value for local residents	19%	13%	42%	33%	45%
The fares are good value for visitors	13%	12%	37%	32%	41%
I do not have access to this service	7%	12%	3%	6%	5%

3.3.2 Walking and cycling infrastructure

- Just over a third of island residents agree that roads, paths and pavements in their local area are in good condition, although responses may have been affected by the non-availability of paths and pavements in some areas.
    - A quarter of island residents agree that their local roads and paths are safe for cycling, and safe and accessible for wheelchairs and prams.
    - Shetland and Orkney Mainland and Outer Isles residents felt safest using local roads, paths and pavements, with more than half of residents agreeing they felt safe. This is significantly greater than Uist and Barra (21%), Skye and the Small Isles (22%) and Argyll Islands (24%), who all reported low agreement with this statement.
    - People aged 66 and over people were less likely to report that roads, paths and pavements were safe compared to those aged 18 to 35.

Figure 7. Quality and safety of roads, paths and pavements



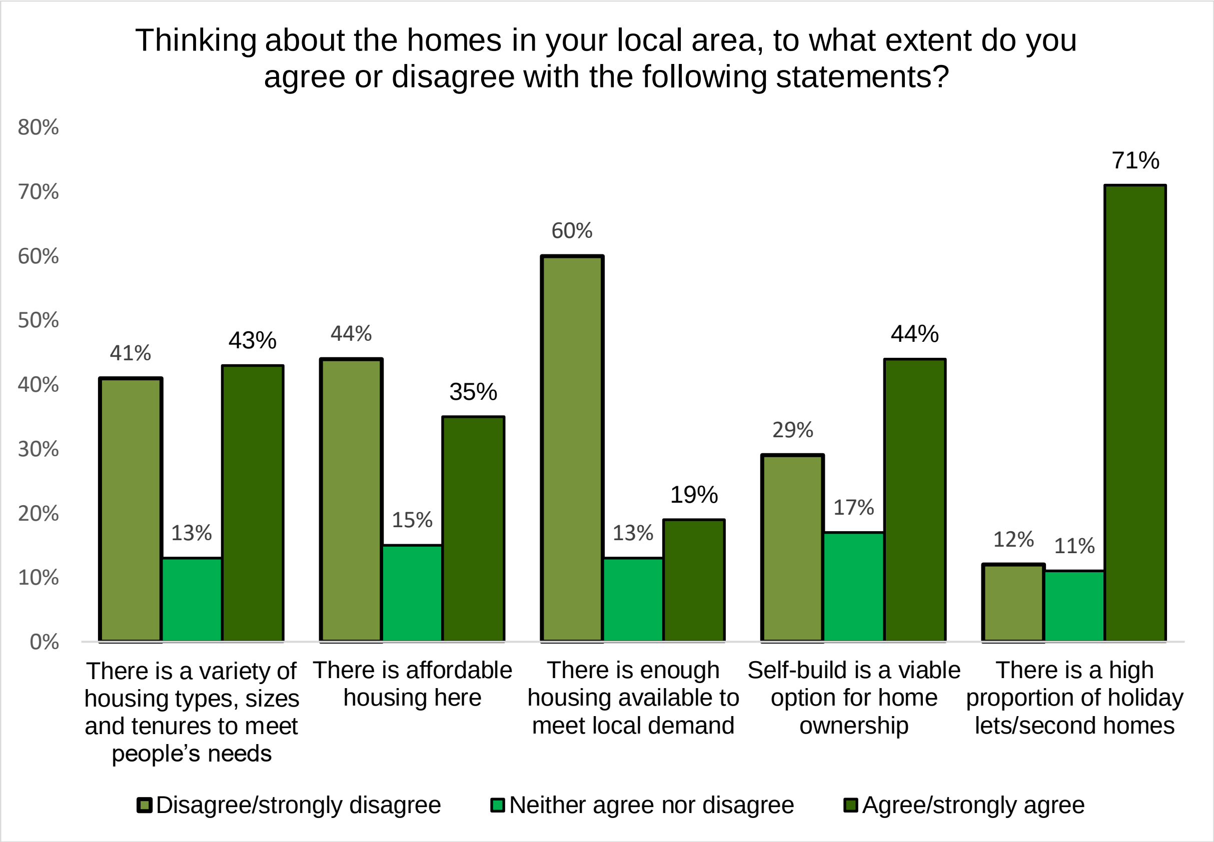
3.4 Housing

There is strong evidence of dissatisfaction with housing among respondents, with perceived poor availability of housing – and affordable housing – in many islands. In contrast, the majority of island groups reported high proportions of holiday and second homes.

3.4.1 Housing

- Less than half of island residents agree that there is a variety of housing types, sizes and tenures to meet people's needs.
  - Agreement was significantly greater in Orkney Mainland (55%) and Shetland Mainland (54%), compared to much lower levels in Skye and the Small Isles (21%) and the Argyll Islands (22%).
- Just over a third of island residents agree that there is affordable housing locally.
  - Agreement was significantly lower in Skye and the Small Isles (19%), Argyll Islands (20%), and Uist and Barra (20%) than other island regions.
- 19% of islanders agree that there is enough housing available to meet local demand.
  - Argyll Islands (8%) and the Skye and the Small Isles (7%) had significantly lower levels of agreement.
- 45% of island residents agree that self-build is a viable option for home ownership, with lowest levels of agreement in Arran, Bute and the Cumbraes (23%), and significantly higher levels in Lewis and Harris (56%).
- 71% of island residents agree that there is a high proportion of local holiday lets and second homes.
  - Agreement was generally high, with six of the nine island groups reporting between 75% and 90% agreement.
  - Shetland Mainland (40%), Shetland Outer Isles (35%) and Orkney Outer Isles (39%) reported significantly lower agreement in comparison.

Figure 8. Availability of housing



3.5 Fuel poverty

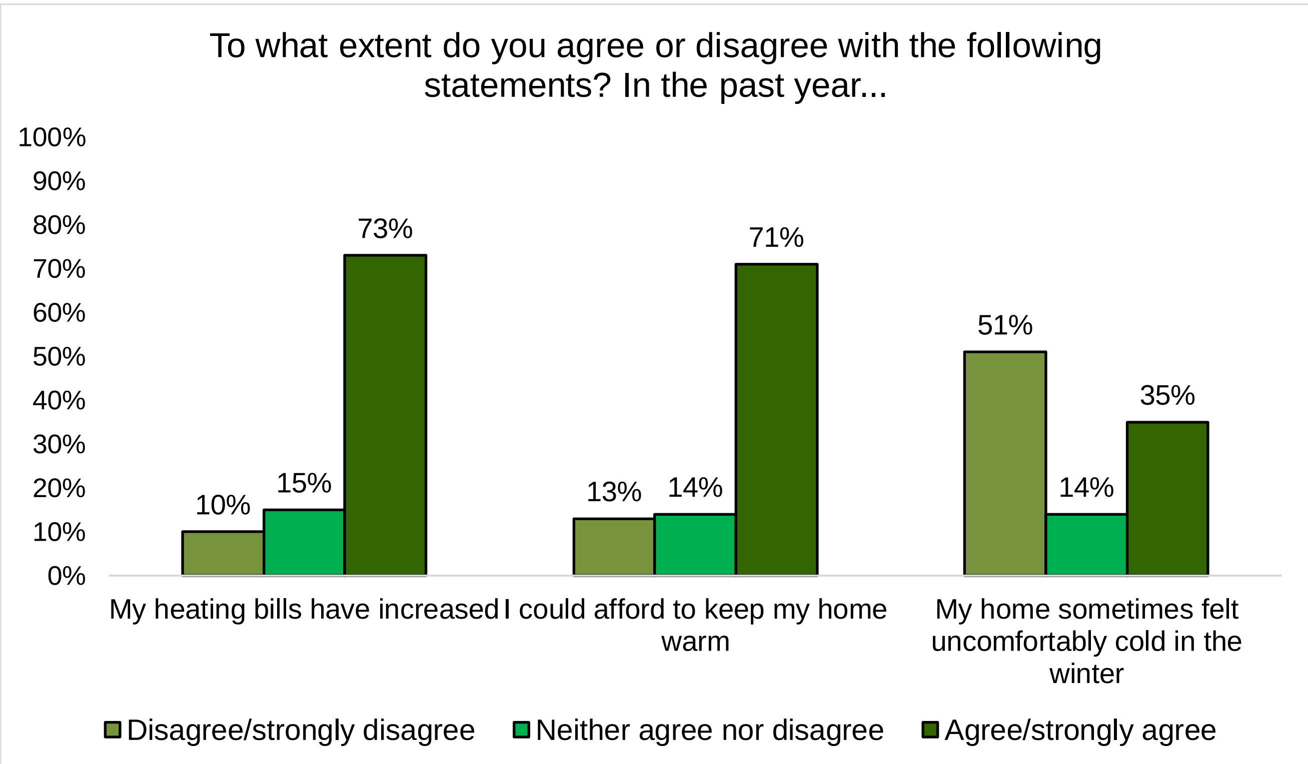
The majority of island residents reported that their heating bills had increased in the past year.

While most said that they could afford to keep their home warm, a significant minority could not and some had to choose between food and heating.

3.5.1 Fuel poverty

- 73% of islanders agreed that their heating bills have increased in the past year.
  - 78% of people aged 66 and over reported an increase compared to 69% of 18 to 35-year-olds
- 71% of island residents agreed that they could afford to keep their home warm in the past year. 13% could not.
  - Shetland Mainland had significantly lower levels of agreement (63%) than other regions.
- Over a third of island residents said that their home sometimes felt uncomfortably cold in the winter.
- 8% of island residents have had to choose between keeping their home warm and buying food or essentials for themselves and their family.
  - An additional 4% indicated 'Prefer not to say' which may imply a higher level of fuel/food poverty.

Figure 9. Home heating



3.6 Digital connectivity

The majority of respondents could access the internet from home. However, speed and reliability of internet connections are an issue for many, particularly in Orkney and Shetland Outer Isles.

Mobile signals vary, with particularly poor reports from Orkney Outer Isles.

Islanders are generally confident in using the internet for most tasks, but slightly less so in attending online health and social care appointments.

3.6.1 Digital inclusion in Island communities

- 96% of island households have access to the internet from home.
  - Older residents, aged 66 and over, report slightly but significantly lower levels of access than other age groups, at 92%.
- 65% of island residents agree that their internet connection at home is fast enough to do what they want online.
  - Only 27% of Shetland Outer Isles residents agreed with this statement compared to 66% of Shetland Mainland residents.
  - A significant difference was also noted between the Orkney Outer Isles (45%) and Orkney Mainland (70%).
- 62% of island residents agree that their internet connection at home is reliable, with significantly lower agreement in Shetland Outer Isles (30%) and Orkney Outer Isles (35%).
- Confidence in using the internet for various activities was high, with lowest confidence (52%) in attending health and social care appointments.
- 60% of island residents agree that there is a good mobile phone signal in their home, and 56% that there is a good signal in their local area.
  - Residents of Orkney Outer Isles report significantly poorer mobile coverage (27% have a good signal at home, and 29% in the local area) compared to residents of Orkney Mainland (78% have a good signal at home, and 69% in the local area)

Figure 10. Internet access at home

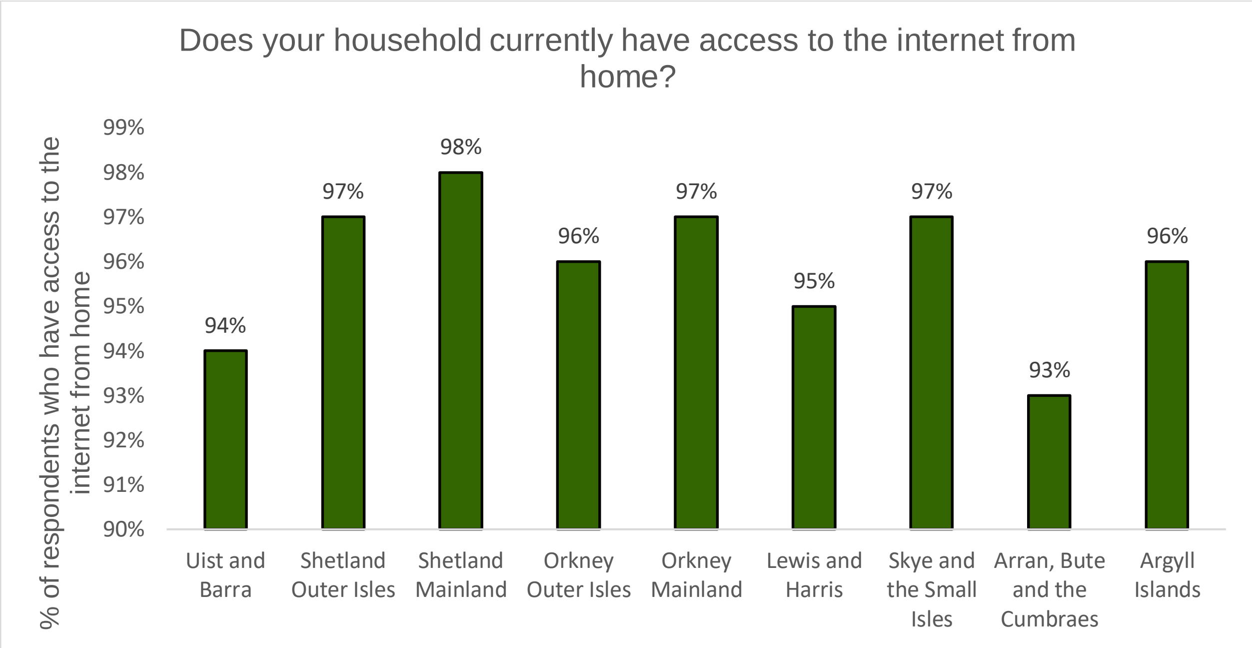


Figure 11. Speed and reliability of internet access

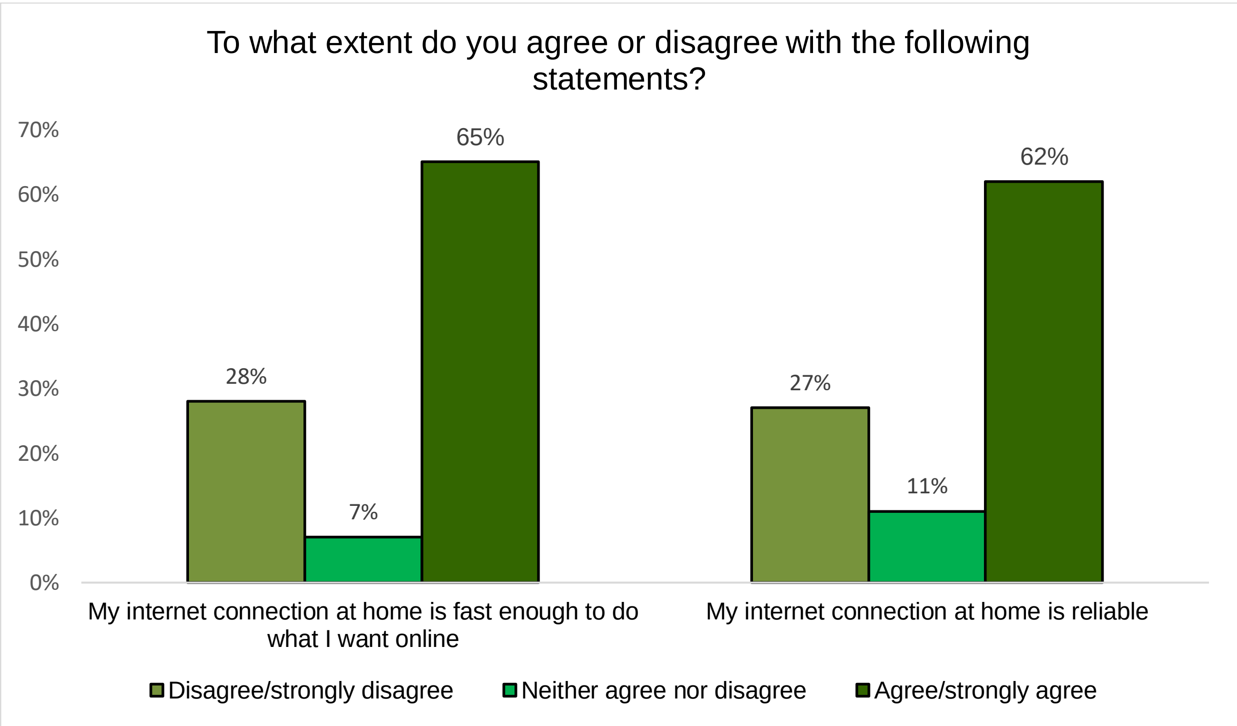


Figure 12. Confidence in using the internet for various activities

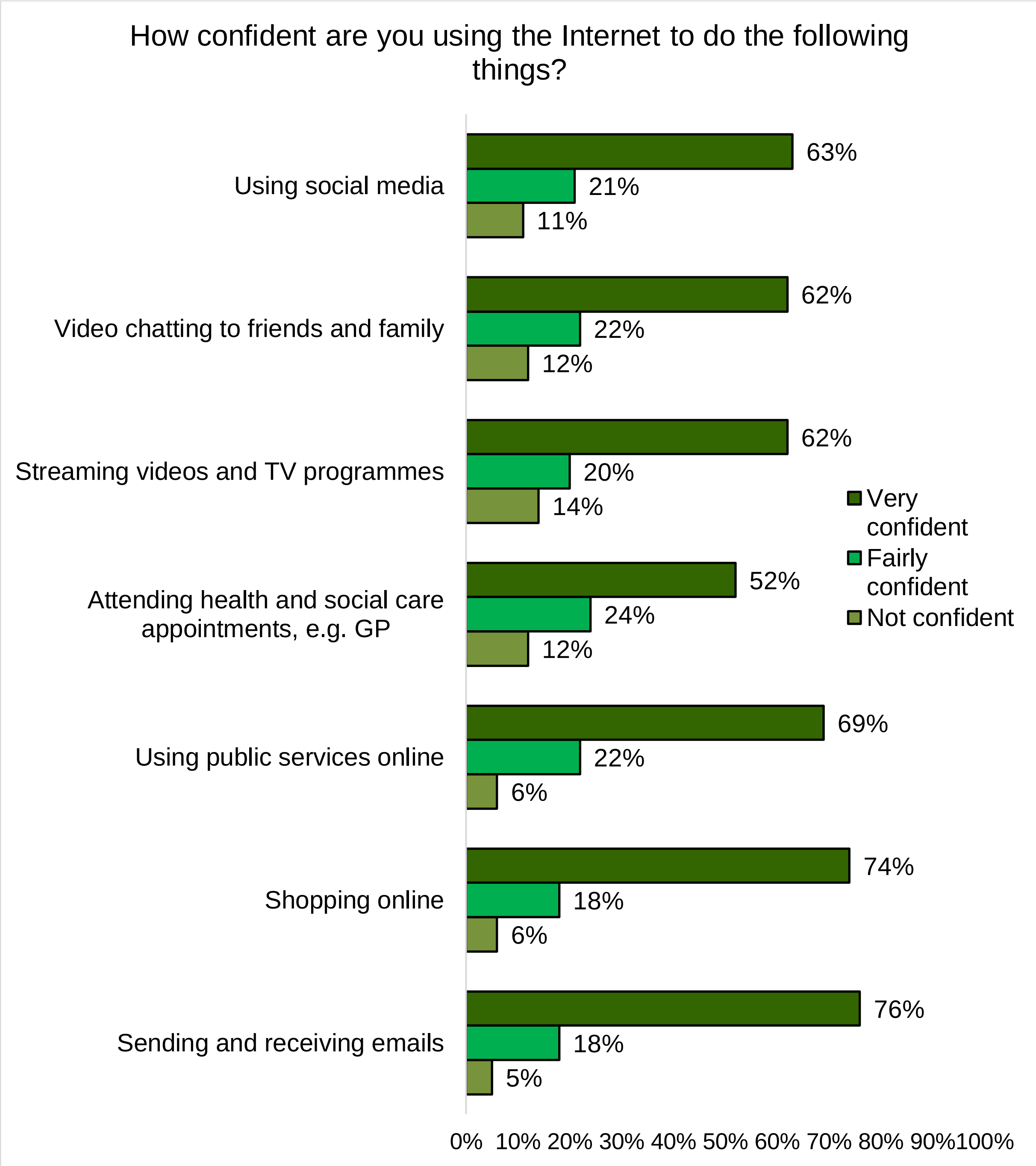
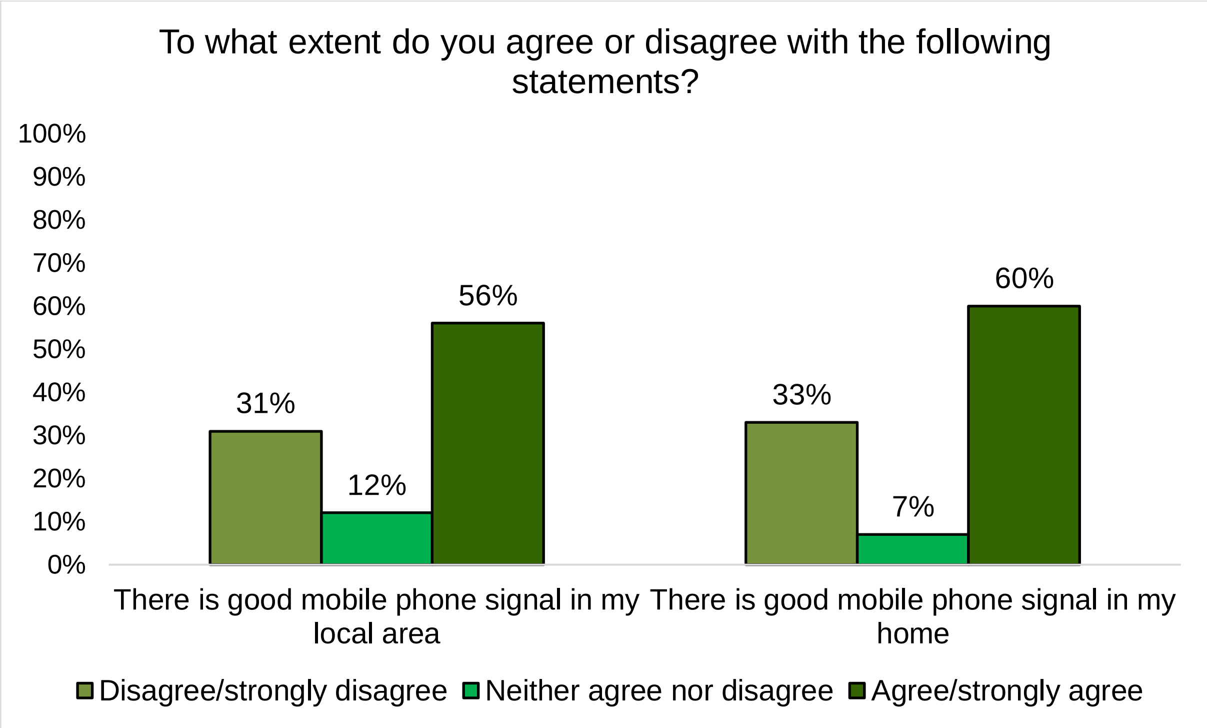


Figure 13. Access to mobile signal



3.7 Health, social care and wellbeing

There are notable differences in reported levels of access to health, social care and wellbeing services between the island groups.

Almost all residents of Orkney Mainland and Shetland Mainland report that they can easily access a hospital, a dentist and a pharmacy. However, substantially fewer residents of Orkney Outer Isles and Shetland Outer Isles report this.

Argyll Islanders report notably lower satisfaction with local sports facilities than other island groups.

Perceived access to mental health services is low, with a large degree of uncertainty about what services are available.

A small proportion of respondents used food banks or food support schemes, although ‘Prefer not to say’ responses and subregion-level variation suggest that this figure may be higher than indicated.

3.7.1 Health and social care services

- Most island residents agreed that they could easily access a hospital, with notable differences between Orkney Mainland (95%) and Orkney Outer Isles (62%), Shetland Mainland (92%) and Shetland Outer Isles (62%). A similar pattern is evident with respect to dentists and pharmacies.
- A quarter of islanders agree that they could easily access mental health services.
  - Levels of agreement significantly differed between the highest level in Lewis and Harris (32%), and the lowest in Shetland Outer Isles (18%).
  - An additional 39% of island residents responded “don’t know”.
- A third of island residents have accessed a health or social care appointment online.

Figure 14. Access to health and social care services

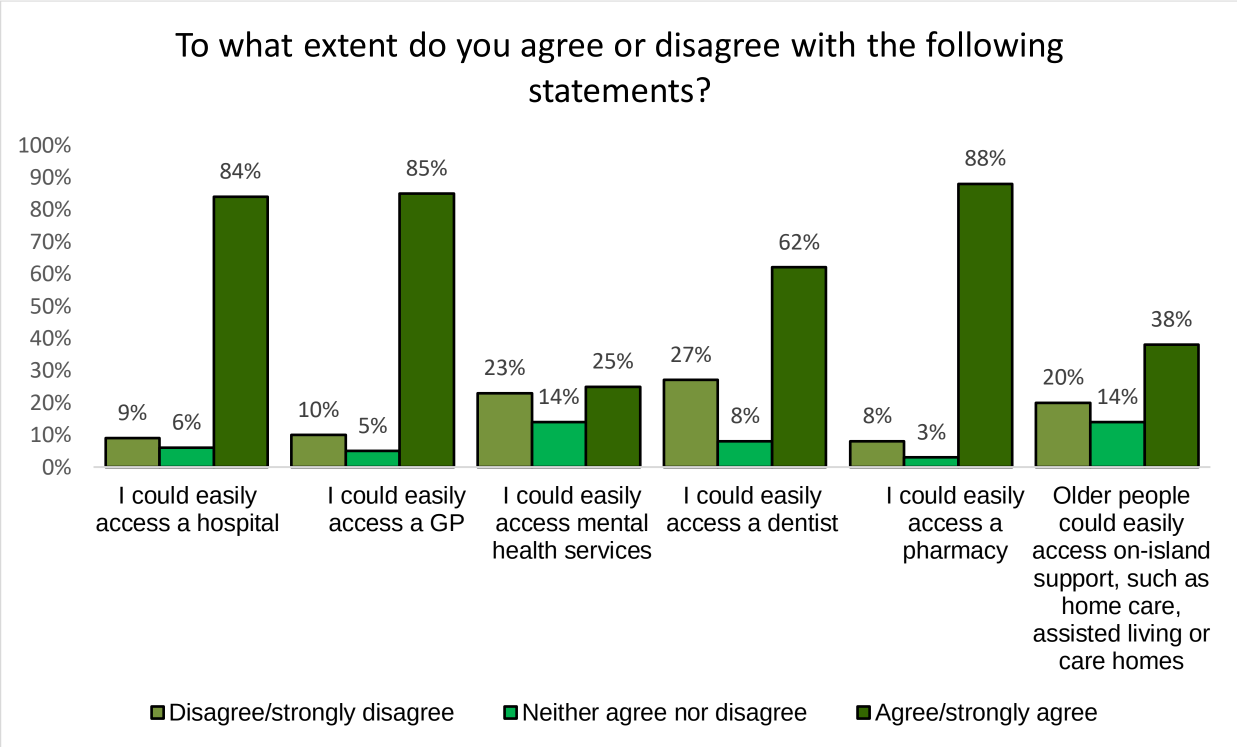
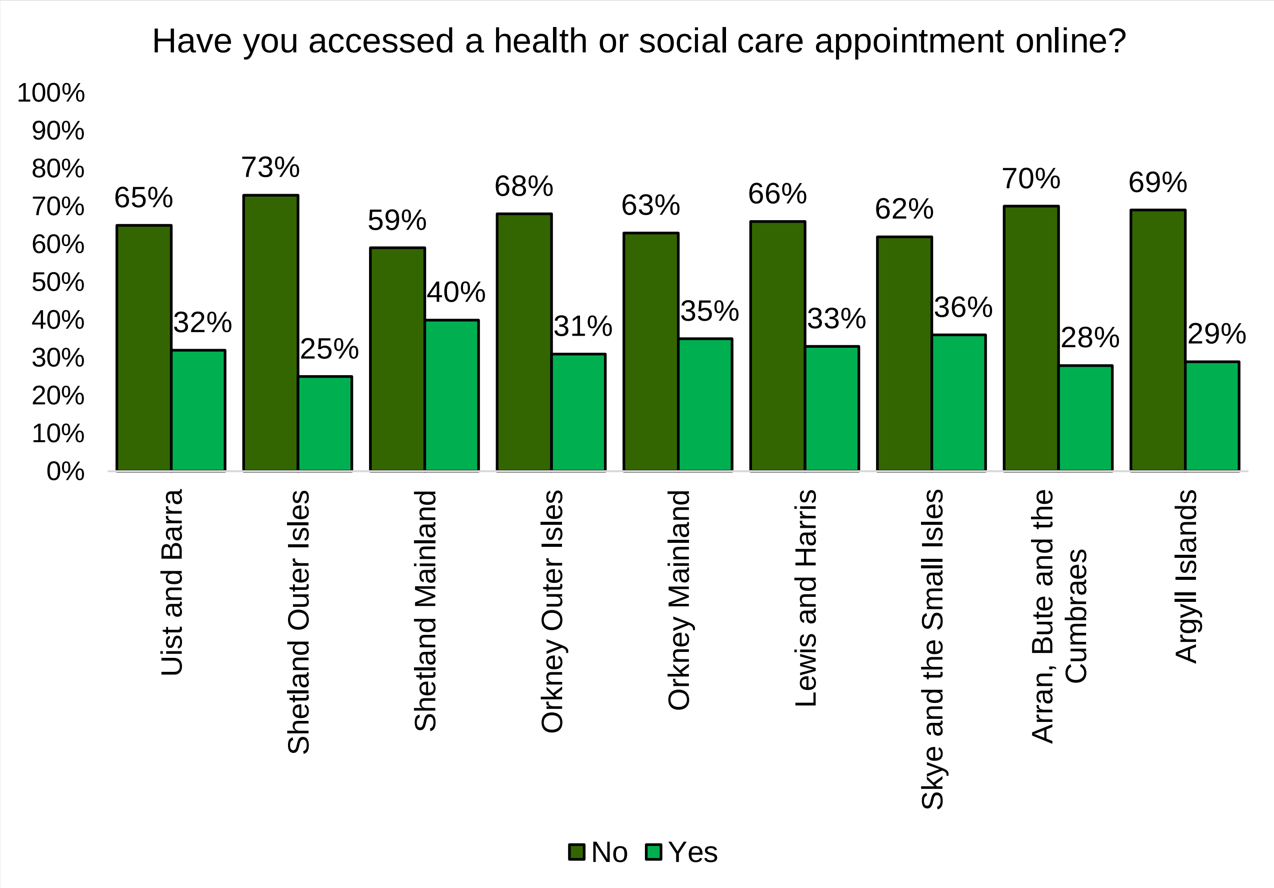


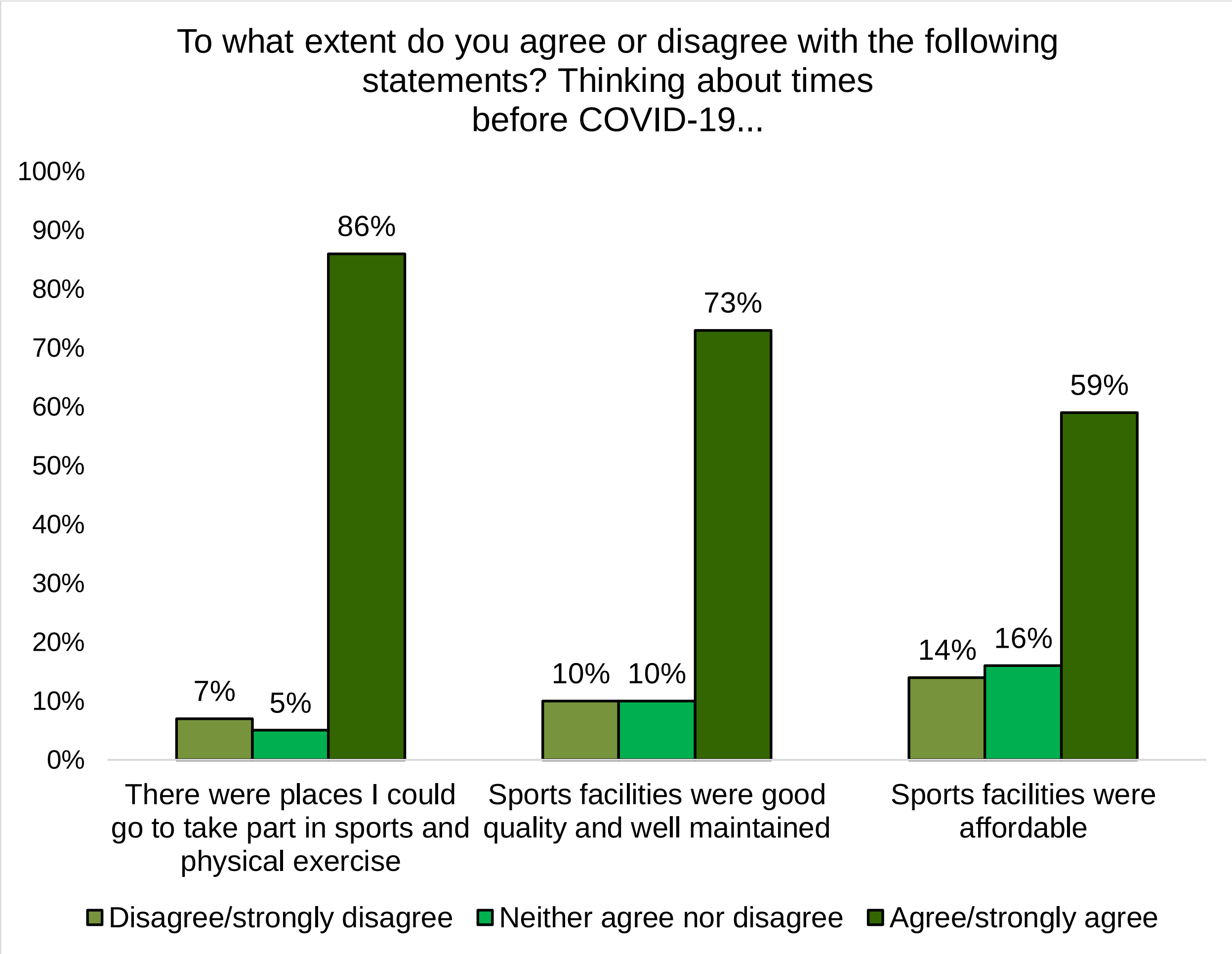
Figure 15. Experience of online health and social care appointments



3.7.2 Physical activity in islands communities

- 86% of island residents agree that there are places where they can go to take part in sports and physical exercise.
    - Island subregions differed greatly on the availability of places for sport and physical exercise, with Argyll Islands reporting lower availability than other islands with only 60% agreement.
- 73% of island residents agree that local sports facilities are good quality and well maintained.
    - Argyll Islands had significantly lower levels of agreement than the rest of the islands at 36%.
- 59% of island residents agree that their sports facilities are affordable.
    - Argyll Islands (40%) and Arran, Bute and the Cumbraes (44%) reported the lowest agreement with this statement.

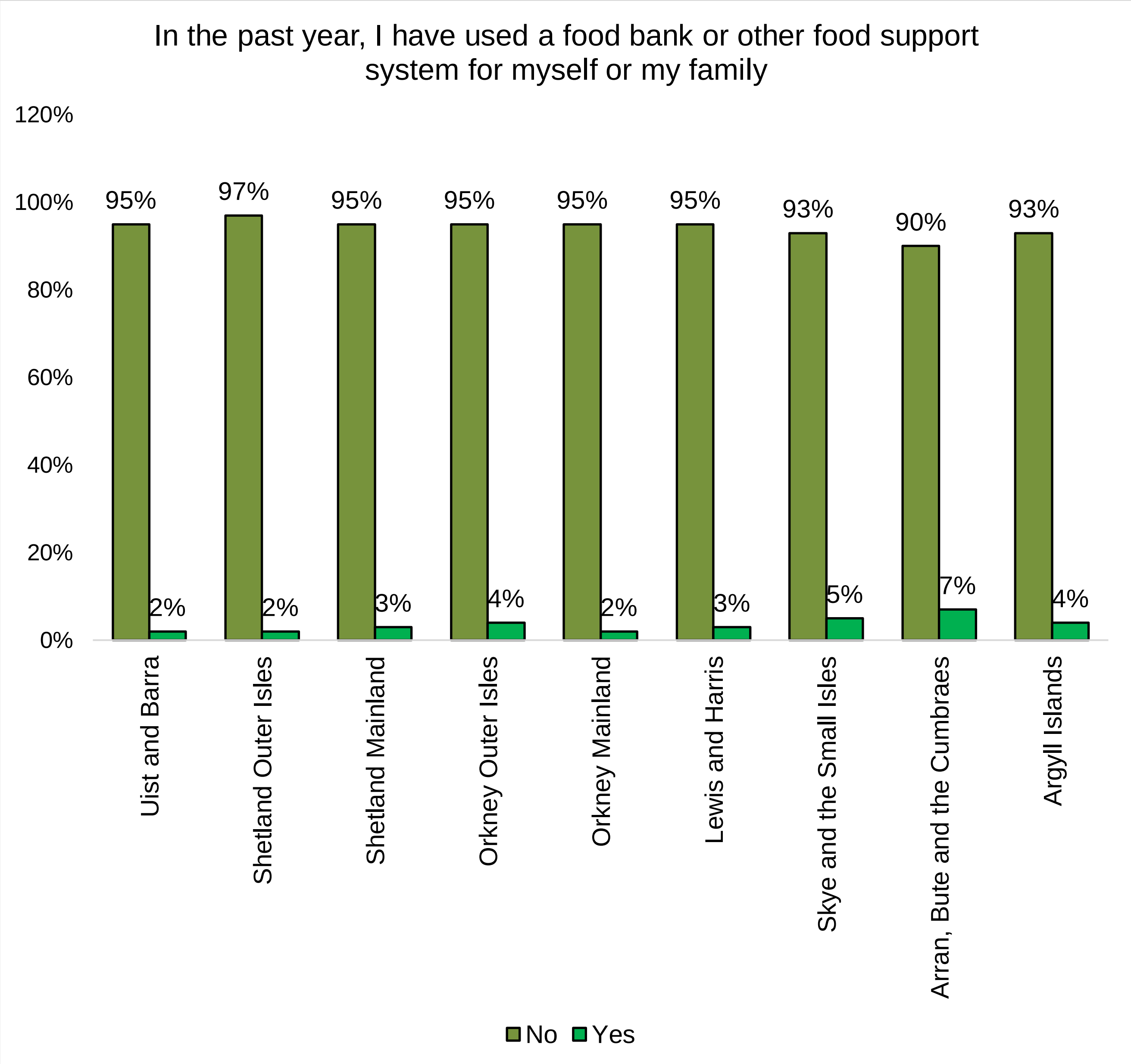
Figure 16. Availability of sports facilities



3.7.3 Child poverty

- Across all islands, 3% of respondents said that they had used a food bank or support system, and another 2% stated ‘Prefer not to say’. The ‘Yes’ percentage was somewhat higher in Arran, Bute and the Cumbraes, and Skye and the Small Isles.

Figure 17. Use of food banks



3.8 Environmental wellbeing and climate change

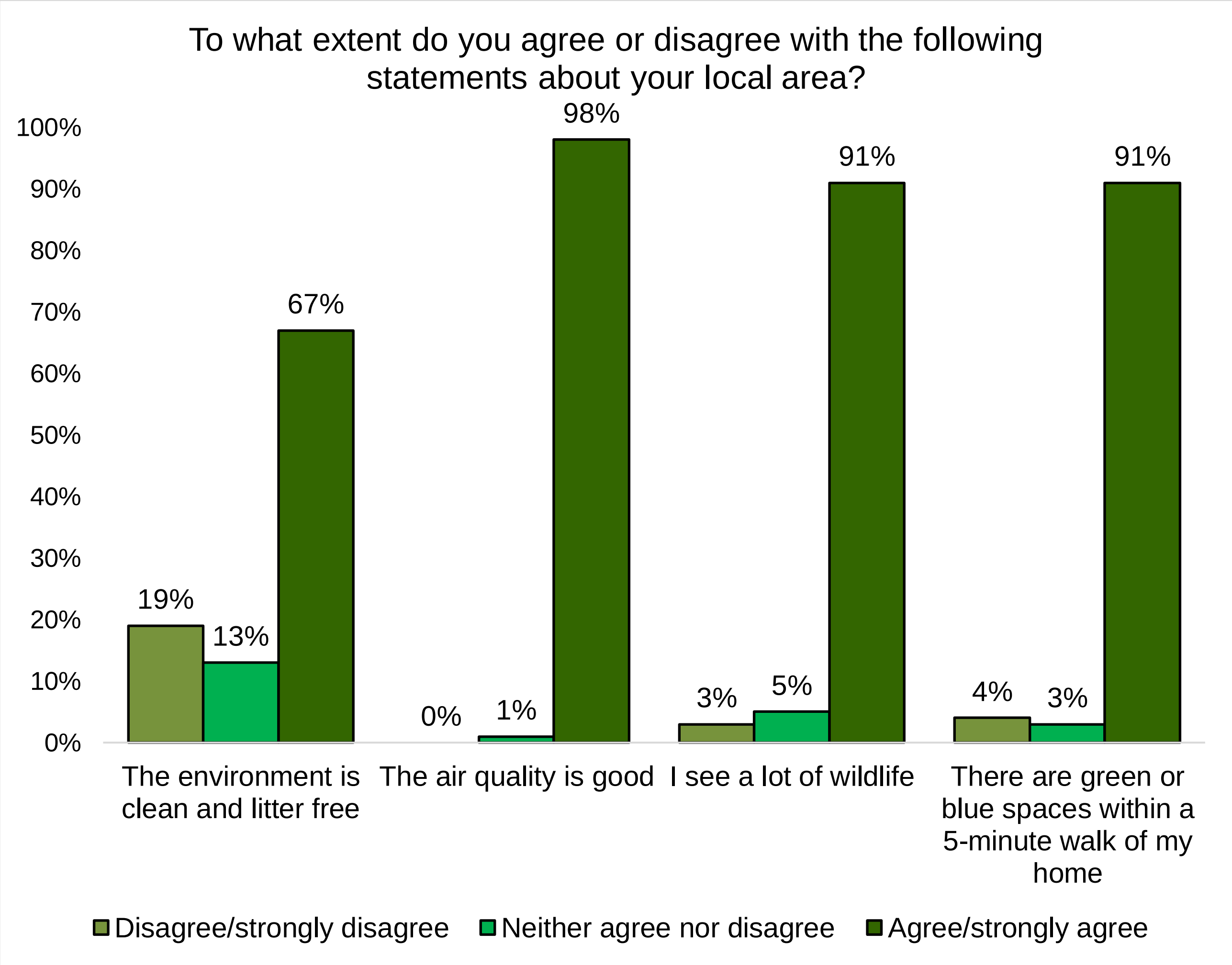
Islanders rate their local environment very highly, and high proportions engage in pro-environmental behaviours, notably buying food locally and generating their own renewable energy, which is particularly common in the Orkney Outer Isles.

Lower proportions of residents report that the local environment is clean and litter-free, however, and the ability to dispose of bulky household waste is a particular issue in the outer islands of Orkney and Shetland.

3.8.1 Environment

- Island residents agree that the air quality is good (98%), they see a lot of wildlife (91%) and there are green or blue spaces within a 5-minute walk of their home (91%), however just 67% of residents agree that their local environment is clean and litter free.
    - Just 55% of residents of Arran, Bute and the Cumbraes say that their environment is clean and litter free, significantly lower than the rest of the island regions.

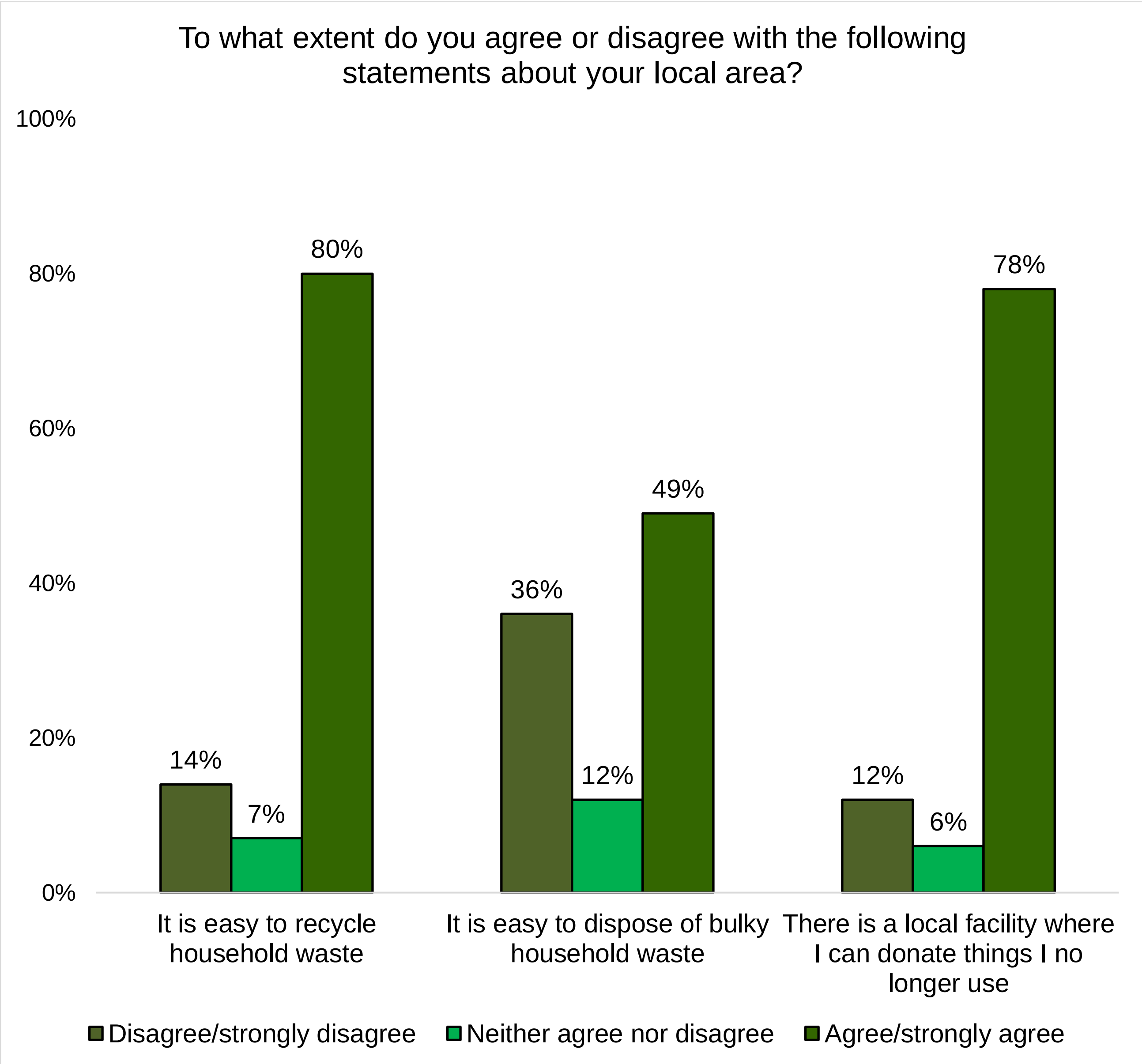
Figure 18. Quality of environment



3.8.2 Waste

- Residents in Orkney's Outer Isles are least satisfied with their recycling facilities, with only 46% reporting that it is easy to recycle household waste (glass, plastic, cans and paper), significantly lower when compared to 88% in Shetland's Outer Isles.
- Residents report mixed experiences of disposing of bulky household waste, with less than half agreeing that it is easy to dispose of and significantly low agreement in Shetland Outer Isles (13%) and Orkney Outer Isles (22%).

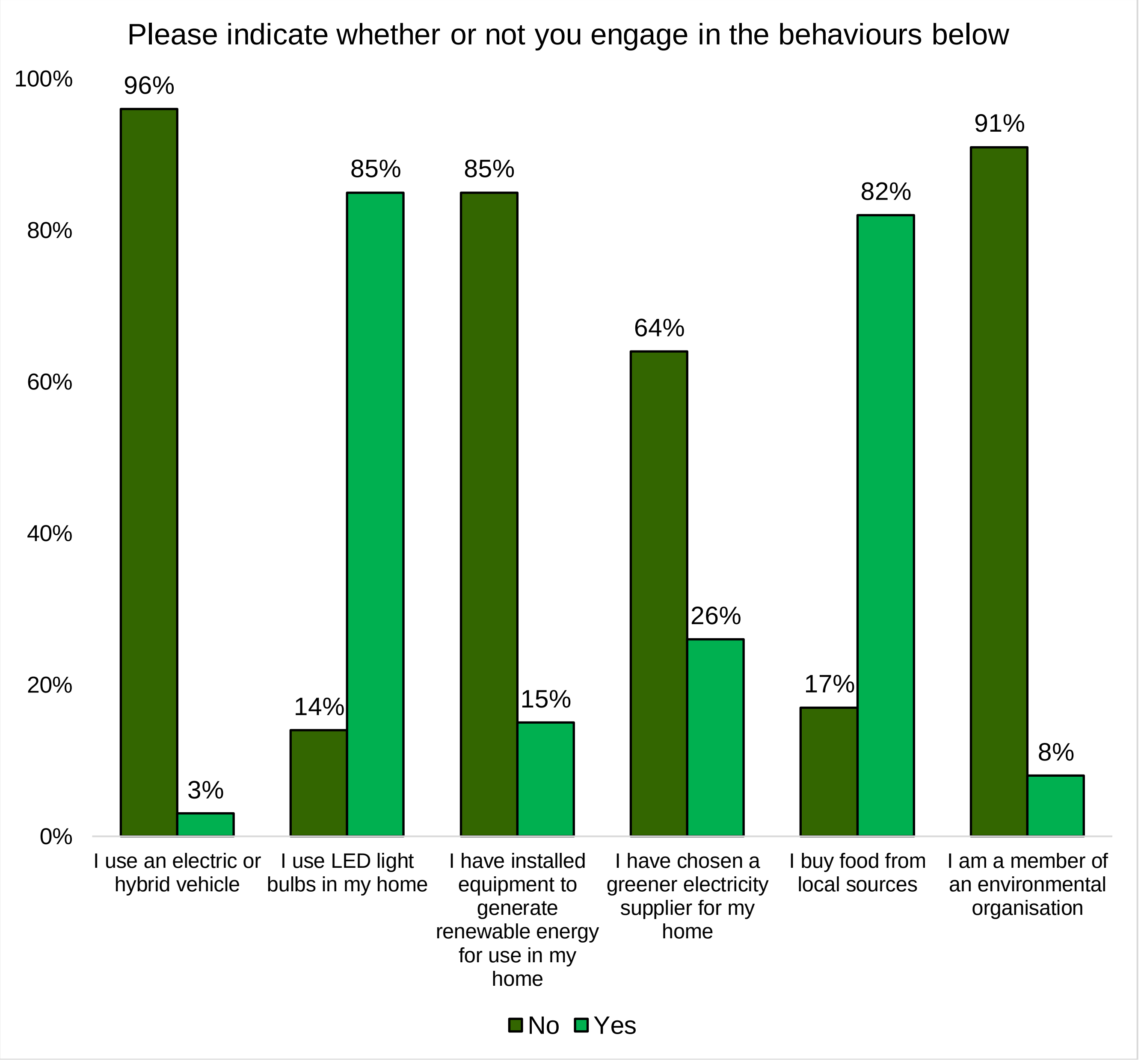
Figure 19. Waste and recycling



3.8.3 Emissions

- A large proportion of islanders use LED bulbs in their home (85%) and buy food from local sources (82%). 3% use electric vehicles.
- A minority of island residents are members of an environmental organisation, with a slight but significant increase in membership with age: 6% of 18 to 35-year-olds compared to 12% of those aged 66 and over.
- 15% of island residents have installed equipment to generate renewable energy for use in their home. Proportions are significantly higher in Orkney Outer Isles (36%) and Orkney Mainland (22%) than other island regions.

Figure 20. Pro-environmental behaviour



3.9 Empowering communities

Islanders, particularly young islanders, have a greater sense of empowerment within their own communities than they do at regional or national level. Island residents generally have a strong sense of belonging to their local area, but sense of community is stronger in some areas than others.

3.9.1 Involvement in decision-making

- Island residents generally perceive that they have little influence over decisions made by local and national organisations, and more influence over community organisations and community councils, particularly in the Outer Isles of Orkney and Shetland, where around half of residents feel they can influence decisions made by their community council.
  - 42% of younger people (aged 18 to 35) compared to 30% of older people (aged 66 and over) report that they can influence decisions made by community organisations such as Development Trusts and community groups.
- Most island residents (82%) see themselves as belonging to their local community.
  - The 18-35 age group were significantly less likely to agree with this statement (77%) than the other age groups.
- The majority of island residents (84%) agree that there are physical spaces where the community can come together.
  - Agreement was significantly higher in the Orkney Outer Isles (97%) and the Shetland Outer Isles (96%).
- A lower percentage of island residents (69%) agree that there is a strong sense of community.
  - Agreement significantly varies between the lowest levels in Lewis and Harris (64%) and the highest in Shetland Outer Isles (81%).

Figure 21. Influence over decision-makers

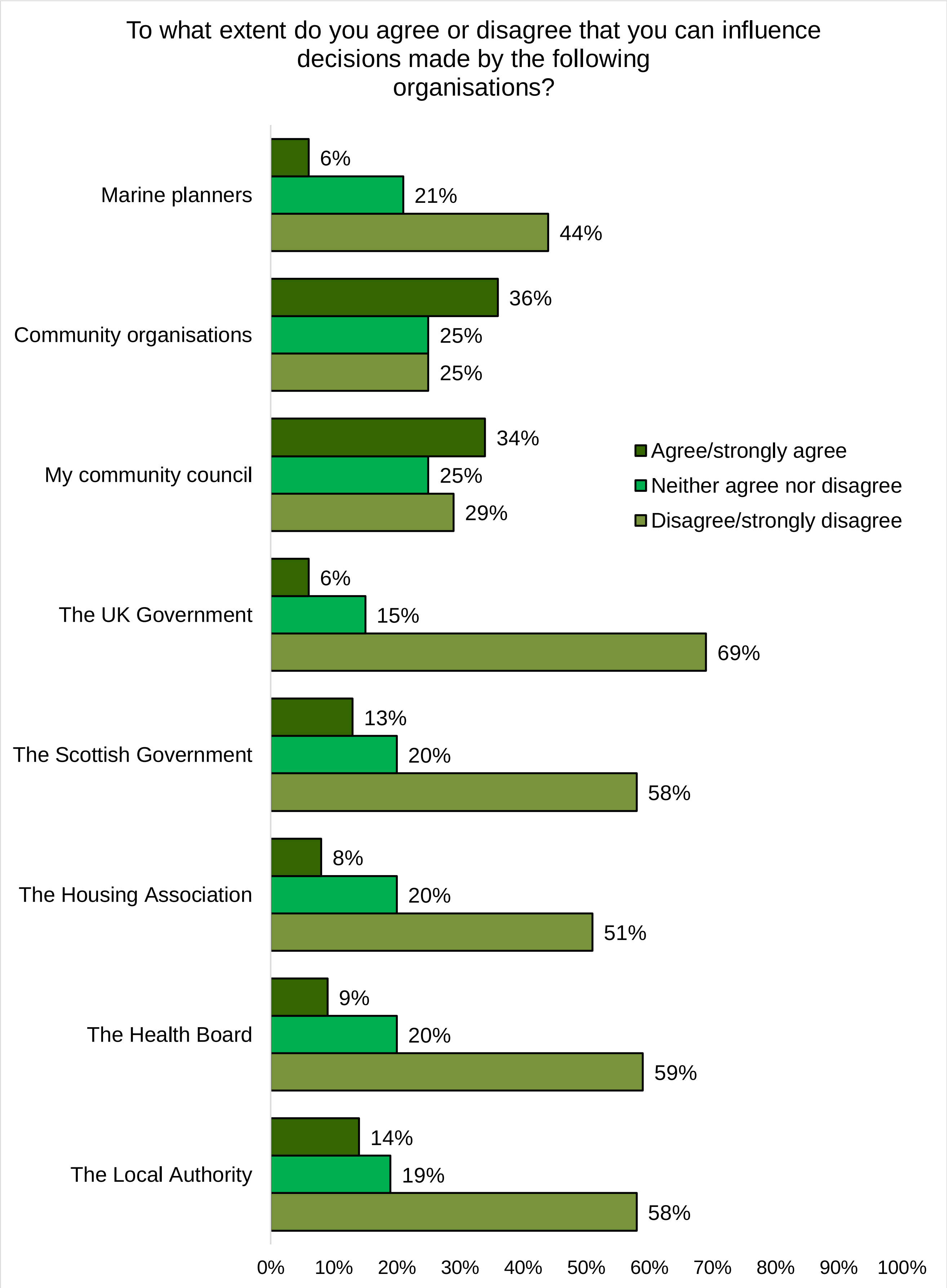
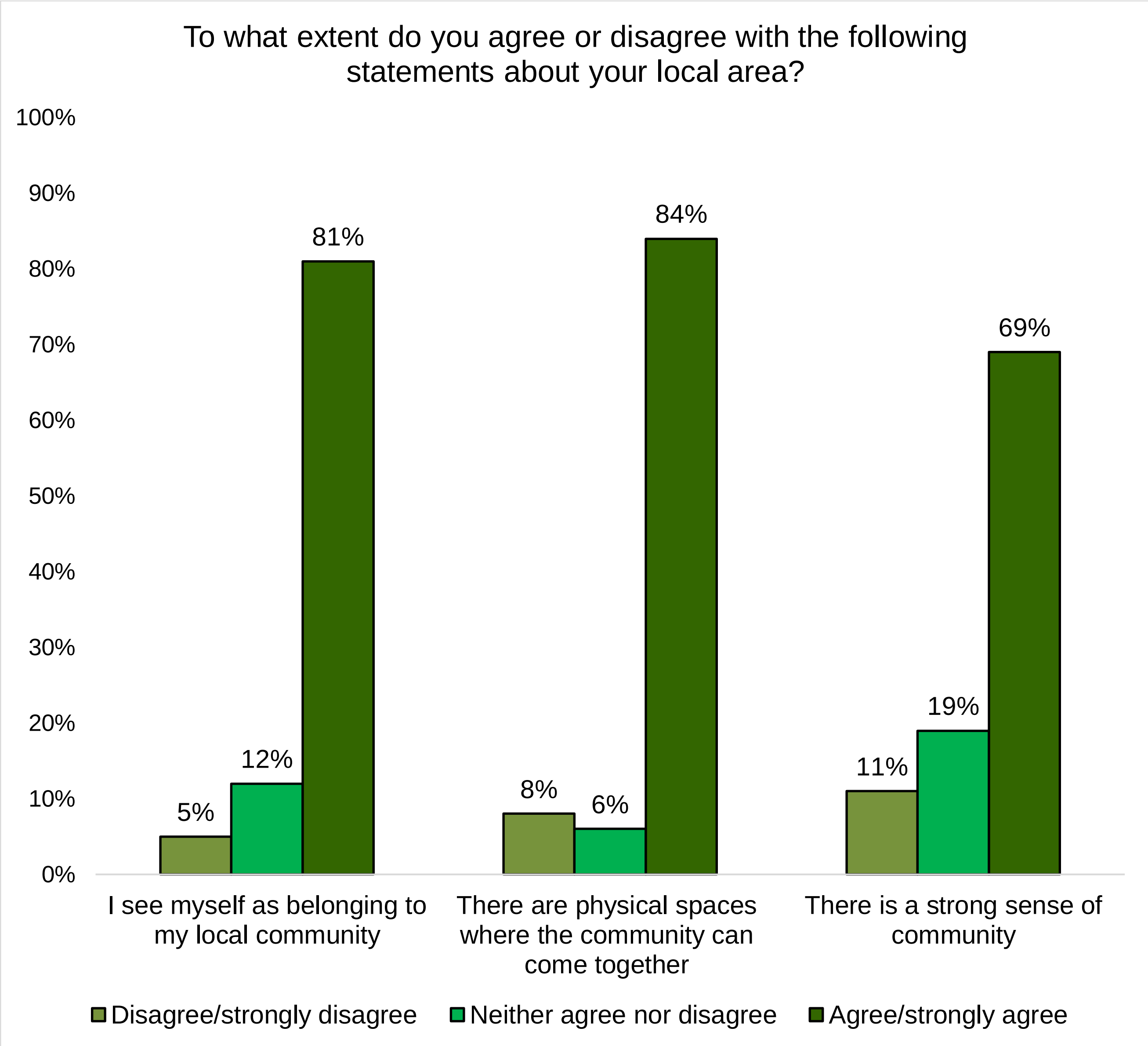


Figure 22. Community spirit



3.10 Arts, culture and language

Experiences of culture and language vary considerably across island groups, age groups and genders, with different patterns of cultural participation and perceptions of the extent to which island culture is supported. Of note, residents of Orkney Mainland and Shetland Mainland are most likely to feel that there is investment in cultural and historic places, and that islanders' creative talents are supported and nurtured.

Those who speak Gaelic have mixed views on how much they are able to use the language in their community, with residents of Lewis and Harris most likely to report that they can use Gaelic in a range of situations. Younger people are more likely to speak and understand Gaelic than older people.

3.10.1 Participating in arts and culture

- 59% of residents agree that there is investment in cultural and historic places and facilities in their island.
    - Agreement was significantly higher in Orkney Mainland (80%) and Shetland Mainland (70%).
    - The 18 to 35 age group reported the highest level of agreement in comparison to other age groups (66%).
- 58% of residents agree that islanders' creative talents are supported and nurtured.
    - Agreement was highest in Orkney Mainland (72%) and Shetland Mainland (74%).
    - The 18-35 age group reported the highest agreement in comparison to other age groups (66%).
- The most popular forms of cultural participation for islanders are the cinema (including mobile), with 41% of islanders attending more than once a year, culturally specific festivals (39%), historic places (38%) and live music events (37%).
    - Different islands have different patterns of participation, however. People living in Shetland Mainland and Orkney Mainland have higher rates of attendance at culturally specific events (59% and 49% respectively attend more than once a year) and at live music events, which 43% and 40% of respondents do at least once a year.
    - Orkney Outer Isles (50%) and Uist and Barra (42%) have the significantly higher attendance at ceilidhs or community dances.
    - Young people aged 18 to 35 are more likely to go to live music events more than once a year (40%), ceilidhs or community dances (31%), visit historic places (42%) or go to a culturally specific festival (48%) than those aged 66 and over.

- However, older people aged 66 and over are more likely to visit an exhibition (29%), art gallery (20%), museum (27%) or library (38%) than younger people aged 18 to 35.
- There are also distinct gender differences, with female residents significantly more active than male residents. Female residents are also more likely to go to the cinema (43%), the library (39%) and the theatre (20%) more than once a year than male residents.

Figure 23. Investment in culture

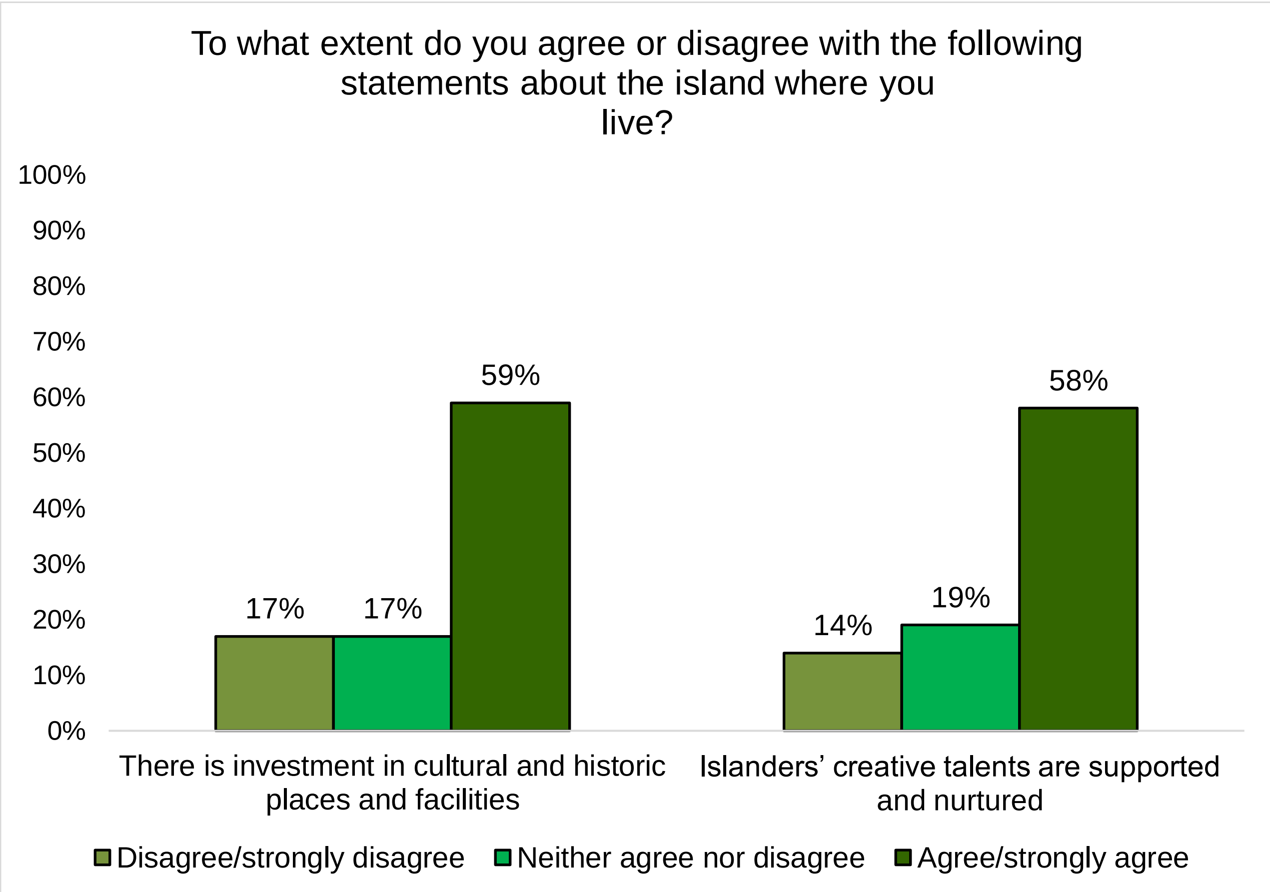


Table 6. Cultural participation

Thinking about times before COVID-19 and lockdown (before March 2020), how often did you go to this type of event or place?						
	Never	**Less than once a year**	**Once a year**	**Several times a year**	**At least once a month**	**At least once a week**
Cinema (including mobile)	21%	18%	20%	35%	5%	1%
Library (including mobile and online)	41%	18%	9%	21%	9%	2%
Live music event	21%	18%	24%	34%	3%	0%
Theatre, e.g. pantomime, musical, play	37%	20%	27%	15%	1%	0%
Ceilidh or community dance	35%	20%	22%	23%	0%	0%
Dance show/performance, e.g. ballet	61%	19%	15%	5%	0%	0%
Historic place	21%	18%	23%	33%	4%	1%
Museum	26%	24%	26%	22%	2%	0%
Art gallery	42%	21%	18%	17%	2%	0%
Exhibition, including art, photography and crafts	30%	22%	24%	23%	1%	0%
Culturally specific festival	16%	11%	34%	38%	1%	0%
Streaming of a live performance	68%	14%	10%	7%	1%	0%

3.10.2 Scotland's indigenous languages

- The highest proportions of Scottish Gaelic speakers are in Uist and Barra (62%), Lewis and Harris (48%) and Skye and the Small Isles (33%).
- Of those who speak Gaelic, 59% agree that there is support for Gaelic speakers to live and work in their community, 47% that they could access public services in Gaelic, and 34% that they can contribute to decisions affecting their local area in Gaelic.
    - Respondents in Lewis and Harris are most positive about these measures.
    - Rates of reading and writing Gaelic are significantly higher among people aged 18-35 than other age groups. Rates of understanding Gaelic are also significantly higher in young people than older people

aged 66 and over. There were no significant differences found in speaking rates across age groups.

- The highest proportions of speakers of a local dialect are in Shetland Outer Isles (76%), Orkney Mainland (70%), Shetland Mainland (68%) and Orkney Outer Isles (42%).
    - Rates of speaking, understanding, reading and writing in local dialects are highest among people aged 18-35, although not significantly different to other age groups.

Figure 24. Use of Scottish Gaelic

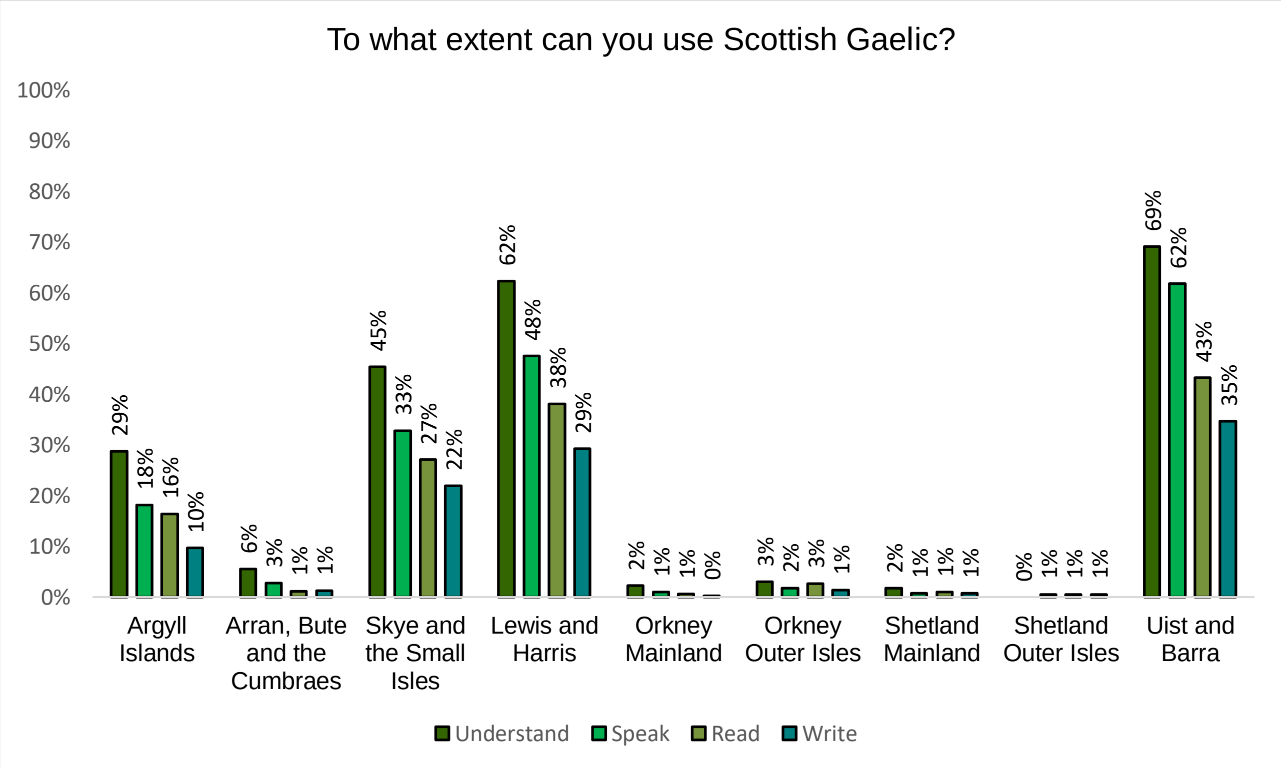


Figure 25. Use of Scots

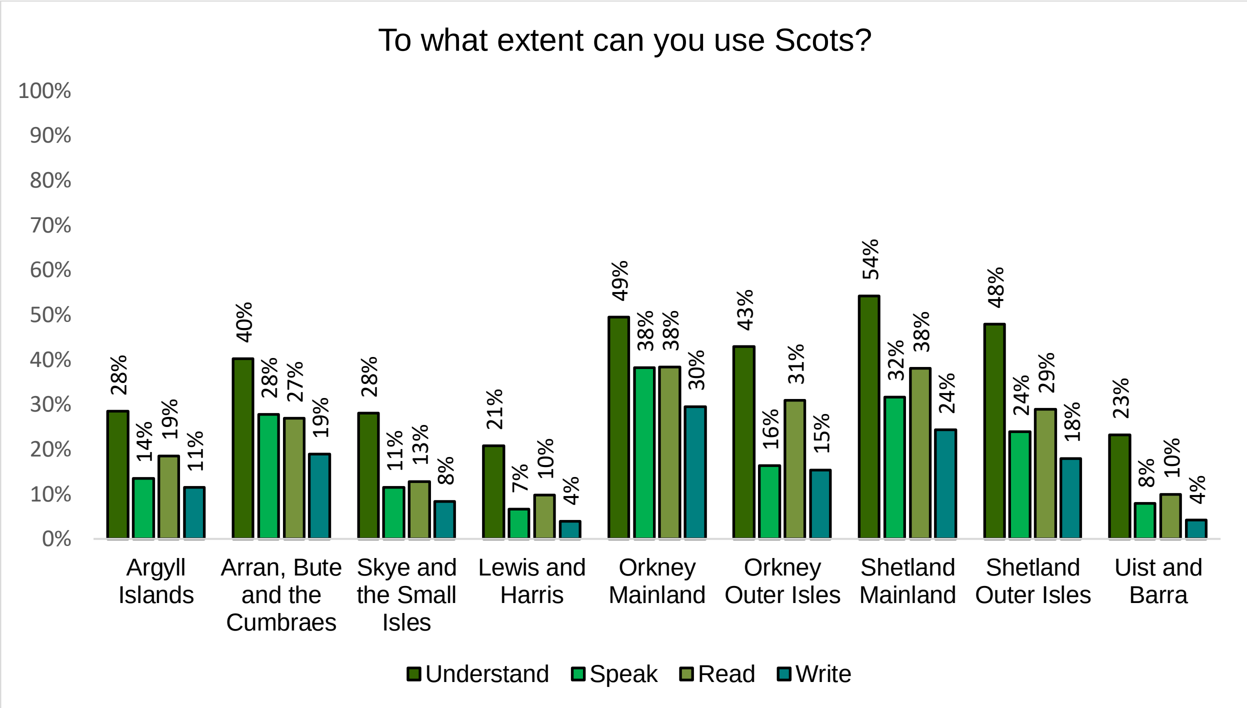


Figure 26. Use of a local dialect

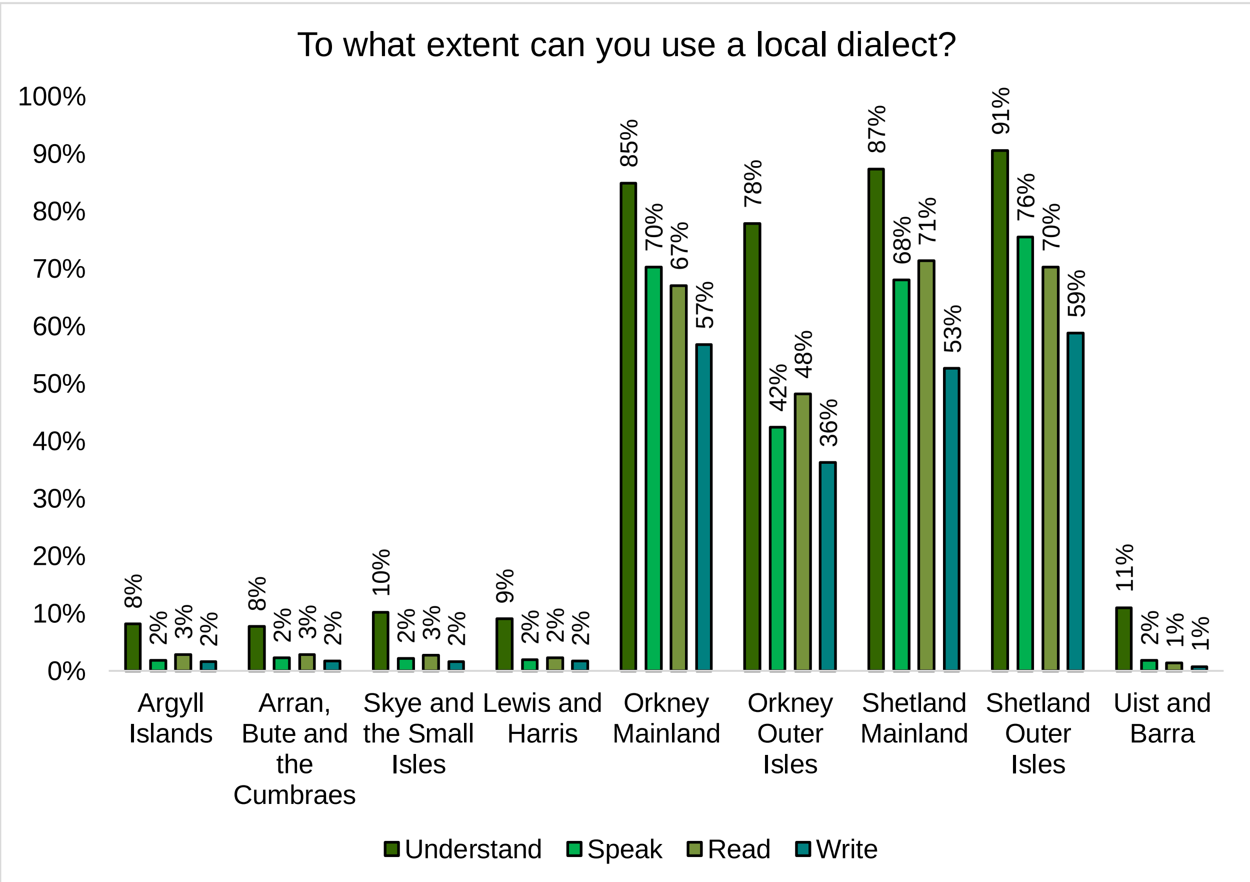
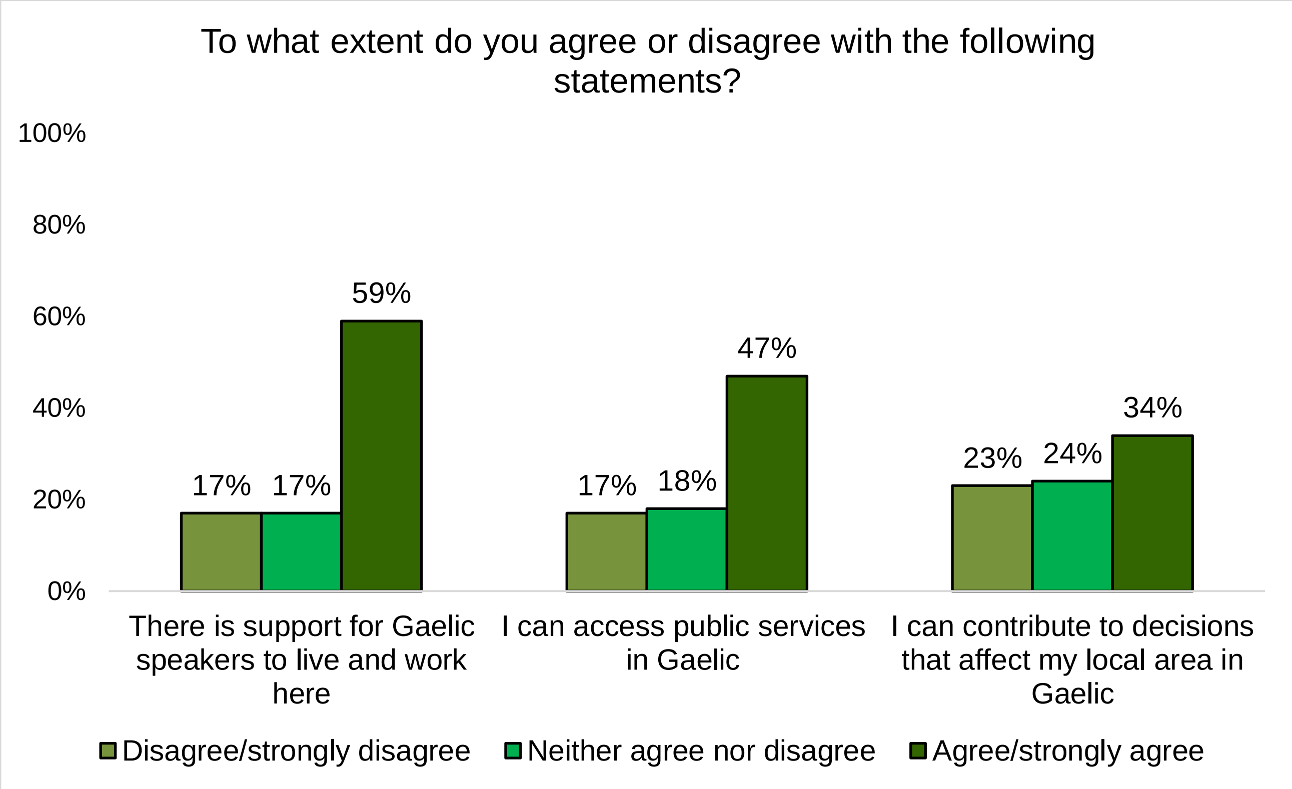


Figure 27. Support for Scottish Gaelic speakers



3.11 Education

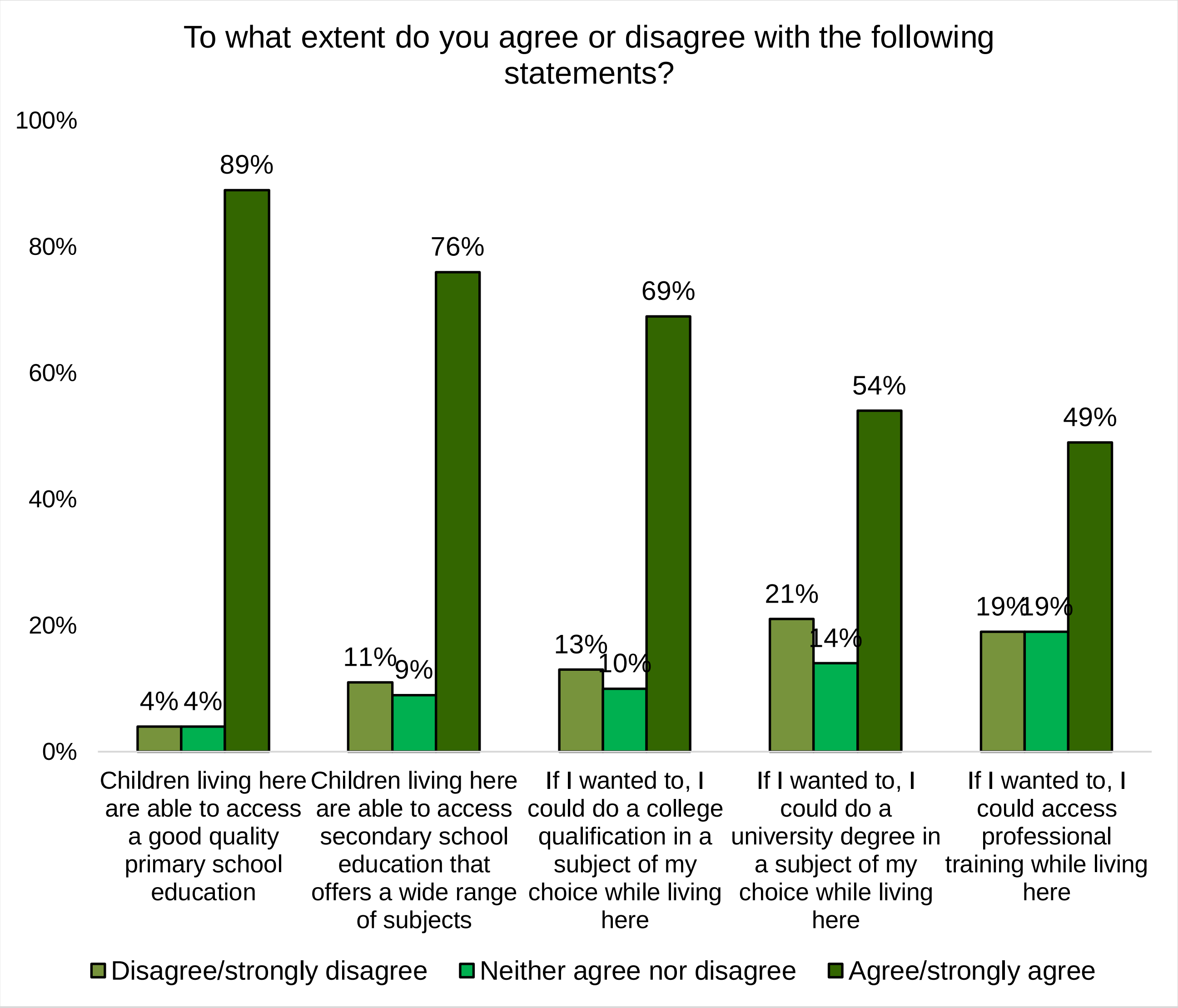
Perceptions of the quality of education available locally are very positive with regard to primary education but decrease notably in some islands in relation to secondary education, likely due to limited subject availability.

Agreement rates with respect to college and university education and professional qualifications are successively lower, with more positive perceptions among those living in island groups where there are small towns.

3.11.1 Educational opportunities

- Most islanders (89%) agree that children living there have access to good quality primary school education.
  - The highest agreement came from Orkney Mainland (95%), Shetland Mainland (95%) and Shetland Outer Isles (92%). In comparison, the Orkney Outer Isles had one of the lowest levels of agreement (81%) along with Uist and Barra (80%).
- Three quarters of islanders agree that children living on the islands can access secondary school education that offers a wide range of subjects (online or in person).
  - Argyll Islands (57%), Uist and Barra (57%) and Arran, Bute and the Cumbraes (59%) had significantly lower levels of agreement.
- 69% of islanders agree that they could do a college qualification in a subject of their choice while living on the islands (online or in person).
  - Island groups with population centres reported higher levels of agreement: Orkney Mainland (77%), Lewis and Harris (75%), and Shetland Mainland (74%).
- Just over half of all respondents agreed that, if they wanted to, they could do a university degree in a subject of their choice while living on the islands (online or in person).
  - Again, highest agreement was found among island groups with population centres: Lewis and Harris (62%) and Orkney Mainland (59%).
  - 18 to 35-year-olds reported significantly lower levels of agreement (48%) with this measure than other age groups.
- Less than half of islanders agreed that, if they wanted to, they could access professional training while living on the islands (online or in person).
  - Agreement was higher in the Orkney Mainland (61%), Shetland Mainland (54%), and Lewis and Harris (54%).

Figure 28. Access to educational opportunities



Methodological note

The survey sought the views of island residents about aspects of island life. The findings therefore relate to islanders' perceptions.

For the purposes of summarising, "agree" and "strongly agree" responses have been combined in an "overall agreement" figure, referred to in the headline findings.

The survey was carried out during the autumn and early winter of 2020, when lockdown restrictions were in place. Several of the questions asked respondents to consider their experiences before the Coronavirus (COVID-19) pandemic, to provide comparable baseline data for future surveys.

4. Conclusion

The National Islands Plan Survey has significantly improved the availability of data held about Scotland’s islands. It has provided baseline data against which to measure the effectiveness of the Plan. This report has presented the overall findings and further analysis of the data will be completed by the Scottish Government to look at aspects of the data in more detail.

A number of the findings appear to contradict assumptions that are sometimes made about Scotland's island residents. Just one in five island respondents works in more than one paid job or business; Scottish Gaelic and Orkney and Shetland dialects are spoken more widely among young respondents than older respondents; and the majority of respondents plan to stay on their island for at least the next five years.

Nevertheless, respondents feel there is a lack of support for young people to remain, move or return to the islands. The data reveals that respondents feel there are a lack of employment, training and higher education opportunities and a lack of childcare options to fit with residents’ working patterns. Respondents also feel there is a poor variety of housing types, sizes and tenures to meet people’s needs and a lack of affordable housing. Respondents also have mixed experiences of accessing healthcare services and of speed and reliability of internet connections.

Yet, the data also suggests that in many ways the islands are a good place to live. Respondents rate their environment very highly and there are many green and blue spaces for people to enjoy. There is a good sense of community and belonging, however, respondents do feel they have little influence over decisions made by local and national government.

Many respondents agreed that there is investment in cultural and historic places and facilities but feel there is inadequate infrastructure for the number of tourists they attract. Respondents believe there is a high proportion of holiday lets and second homes in their local areas but recognise that tourism is a good source of employment opportunities.

The findings highlight that experiences of island life vary considerably by island group. Differences are particularly striking between residents of Orkney Mainland and Outer Isles, and Shetland Mainland and Outer Isles, with “mainland” islanders generally more positive about a range of measures. These differences may be attributable to proximity to a small town (associated with access to services and more diverse economies) and direct access to mainland Scotland from the “mainland” islands, unlike in the outer islands.

Different age groups, too, have distinct experiences of island life, and a young person’s views can contrast with those of an older person living in the same island group. This is especially true of perceptions of opportunities for population growth and economic development, about which younger respondents are more positive.

5. Secondary data sources

National Records of Scotland (NRS) 2020-2 Scottish Postcode Directory - Postcode Index: Contains NRS data © Crown copyright and database right [2021].

NRS 2011 Census Indexes: © Crown copyright. Data supplied by National Records of Scotland.

NRS 2020-2 Scottish Postcode Directory - Geography metadata: Contains NRS data © Crown copyright and database right [2021].

NRS Island boundaries - Islands 2020: Contains NRS data © Crown copyright and database right [2021], Contains Ordnance Survey data © Crown copyright and database right [2021]. (Note: these data were also provided by NRS in August 2020 and used in analysis. Guidance provided by NRS is also acknowledged).

NRS Census Output Areas 2011 (Clipped to the coastline with inland water removed (MHW)): Copyright National Records of Scotland, contains Ordnance Survey data © Crown copyright and database right (2020).

Scotland's Census tables LC1117SC (Output Areas), DC1117SC (Council Areas): © Crown copyright. Data supplied by National Records of Scotland.

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Ordnance Survey 1:250 000 Scale Colour Raster: © Crown copyright and/or database right 2019 OS.

OS OpenMap Local (Full Colour Raster): Contains Ordnance Survey data © Crown copyright and database right 2020.

Software acknowledgements

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