

ENABLING THE NEXT GENERATION

Young People and the Highlands and Islands
Maximising Opportunities:
ORKNEY



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HEADLINE FINDINGS

Staying and leaving

- Half of the responding young people from Orkney identify as committed stayers, which is above the regional figure of 46%. They are also more likely than average to want to live in their local area in the future, though other parts of the region have less of an attraction for them.
- Young people in Orkney have the most positive views of all parts of the region, of those who choose to stay in the Highlands and Islands post-school. They associate staying with strong community affinity, an appreciation of the quality of life on offer, and an awareness of local opportunities. Those who leave are felt to do so mainly to broaden life experiences and access training or employment.

Education

- Young people from Orkney tend to be more positive about educational provision in the Highlands and Islands than those living elsewhere in the region. However, more still needs to be done to expand the course offering and meet expectations regarding subject specialisation.
- Respondents from Orkney are more positive about the educational offer in the Highlands and Islands than they were in 2015, particularly on the range of post-graduate and higher education opportunities, the affordability of study in the region and opportunities to learn remotely.
- Apprenticeships and work placements were more likely to be perceived as accessible by young people in Orkney than was reported across the region overall.

Employment

- Young people from Orkney are more likely to aspire to full-time employment and less likely to envisage starting a business than any other area in the region. Interest, ideas and confidence in doing so are lower than average, although they are more likely to report access to appropriate knowledge and finance.
- Most young respondents from Orkney perceive barriers to achieving employment goals, although this is lower than across the region overall. Barriers identified are similar to those experienced elsewhere, with lack of local opportunities cited most frequently. While housing was less likely to be cited as a barrier by these young people, this only extended to those living in Kirkwall. Those living outwith saw housing and affordable transport as being particular challenges.
- A similar proportion of young people in Orkney as in the Highlands and Islands overall want to work in their local area in future, while less see themselves working elsewhere in the region. Those in Kirkwall were more likely to want to work locally than those living outside of Kirkwall.
- Young people in Orkney are looking for similar job characteristics as elsewhere in the region, with good work-life balance, a steady job and an understanding employer all being key. They are more likely than average to think that what they are looking for in a job is available both locally and regionally.

Community and culture

- Community participation amongst young people in Orkney is higher than any other area in the region with those living outside of Kirkwall being more likely to participate than those in Kirkwall.
- Respondents from Orkney have extremely high levels of pride in and positive views of their local community, particularly in relation to bringing up families, quality of life and safety. However, markedly fewer see it as a place where it is OK to be different and this has declined since 2015.

Maximising opportunities

- Young people from Orkney are more likely to feel that people must make compromises to live in the Highlands and Islands, particularly in relation to education and employment. Travel and transport, mobile and digital connectivity are key compromises many feel they have already made, more so than regionally.
- For young people in Orkney, employment-related factors and cost of living were cited as the most important economic considerations in making the Highlands and Islands more attractive to young people. Access to good healthcare and quality of life were the most critical social factors, although a higher proportion than regionally also cited the importance of a sense of community.

1 INTRODUCTION

1.1 In 2018, Highlands and Islands Enterprise (HIE) commissioned ekosgen to undertake a major research study focused on the changing attitudes and aspirations of young people aged between 15 and 30, in relation to living in the Highlands and Islands. The study builds on similar research undertaken by HIE in 2015 and explores how opportunities in the region can be maximised for all young people to live, work and study in the Highlands and Islands¹.

1.2 This report presents the findings of young people from Orkney who participated in the research. It provides comparisons with the results for the Highlands and Islands overall and findings from the 2015 study. Where possible, analysis is provided for young people living in Kirkwall, highlighting where their views differ from those living elsewhere in Orkney.

RESEARCH STUDY APPROACH

1.3 The research study consisted of an in-depth survey of young people both within and outwith the Highlands and Islands, coupled with a programme of online focus groups with young people. These were supported by a social media engagement campaign to foster interest and engagement in the research. A broad programme of consultation with stakeholders across the region was also undertaken to explore the perspectives of employers, policy-makers and key groups in relation to the study. Additionally, desk research around regional and national policy aimed at population growth and talent attraction was carried out alongside socio-economic profiling and data analysis of young people in the Highlands and Islands and its sub-regions.

1.4 Overall, a total of 3,130 young people participated in the research, sharing their views on the region as place to live, work and study. This included 121 young people from Orkney, of which 43% (50) live in Kirkwall and 57% (69) in other parts of Orkney. Two respondents did not give a postcode, so their local area could not be determined. In terms of age, 45% of the respondents from Orkney are 15-18 years old, 26% are 19-24 and 30% are aged 25-30. The majority (69%) are female, whilst 31% are male.

RESEARCH QUESTIONS

1.5 The study has two principal aims. The first is to provide an overview of the evolving attitudes and aspirations of young people in the Highlands and Islands and how these have changed since 2015. The second is to identify gaps in the current provision of education, training and employment opportunities and points to consider so that opportunities can be maximised for all young people. The research was designed to address the following objectives:

- Provide a socio-economic profile of young people in the Highlands and Islands overall, and of its sub-regions;
- Provide a brief overview of key regional and national policy initiatives designed to support population growth and talent attraction strategies;
- Track how the attitudes and aspirations of young people have changed, if at all, since the previous study was undertaken in 2015;
- Explore provision of and attitudes to education, training and employment opportunities across the region, identifying gaps, areas of inequality, and good practice examples; and
- Identify areas and specific points for consideration in terms of how to better position the Highlands and Islands as a place where young people want to live, work and study. Further policy interventions may be required to support this.

¹ The 2015 research is available at www.hie.co.uk/young-people-research and 2018 findings at www.hie.co.uk/yp-research

2 THE ORKNEY CONTEXT

INTRODUCTION

2.1 This chapter provides an overview of the social and economic context of Orkney. It includes a general overview of the area and its main centres, population and migration trends, the educational offer and employment trends.

OVERVIEW OF ORKNEY

2.2 Orkney covers a large geographic area of approximately 990 km² and, with a total estimated population of 22,190 in 2018, has a very low population density of approximately 22 inhabitants per km². Orkney's location gives rise to a number of infrastructure and connectivity issues such as transport costs, fuel dependency and broadband and grid connections.²

2.3 Located only 16 kilometres from the Scottish mainland, Orkney is an archipelago of approximately 70 islands, 18 of which are inhabited. The largest island, Mainland, is home to around 80% of Orkney's population. The rest of Orkney's islands are grouped into the North and South Isles, based on their position in relation to Mainland.

2.4 Orkney's two main towns – Kirkwall and Stromness – are situated on Mainland. Kirkwall is Orkney's largest town, home to nearly half of its population. It is where the Council and NHS Headquarters are located. As well as administrative and transport services, Kirkwall is a centre for arts, culture and leisure facilities. These include the largest leisure centre in Orkney – the Pickaquooy Centre, Orkney Theatre, Orkney Library and Archive, and two museums.

2.5 Transport between Orkney's islands, the rest of the Highlands and Islands, and the rest of Scotland, is through air and ferry services. Northlink Ferries operates Kirkwall to Aberdeen and Stromness to Scrabster sailings, while Pentland Ferries provides services between South Ronaldsay and Gill's Bay near John o' Groats. Loganair services from Kirkwall airport includes links to the Scottish Mainland (Edinburgh, Glasgow, Aberdeen and Inverness), as well as to Shetland. Orkney's internal transport services includes an inter-island ferries network which connects 13 islands to Orkney Mainland and is delivered by Orkney Ferries, a company owned by Orkney Islands Council.

2.6 Orkney is distinct from the rest of the Highlands and Islands in that the economy has traditionally been agriculture-driven, owing to its fertile land. Increasingly, the economy is diversifying into sectors such as tourism, food processing and creative industries. It is a key player in the emerging marine renewables sector with a cluster of businesses offering a full range of support for the development of this industry including the European Marine Energy Centre (EMEC) where prototype wave and tidal devices are tested.

SOCIO-ECONOMIC PROFILE

Population and migration trends³

2.7 Of a population of 22,190 in 2018, 16% (3,586) were estimated to be young people aged 15-30. This is the same proportion as the Highlands and Islands region overall and below the national average of 20%. Between 2011 to 2018, the number of 15-30-year olds living in Orkney declined by 4.3%, while the total population increased by 3.6%.

² Orkney Islands Council, *Economic Strategy 2012-2016*, p.7

http://www.orkneycommunities.co.uk/COMMUNITYPLANNING/documents/MINUTES/Task%20force/Orkney%20Economic%20Strategy%202012-16%20_no%20action%20plan_.pdf

³ Data in this section is from the following National Records of Scotland (NRS) publications: Small Area Mid-Year Population Estimates 2011 and 2018, Migration to and from Scotland 2017-18 and Sub-National Population Projections (2016 based).

2.8 In 2017-18 Orkney had a net in-migration across the total population. However, there was a net out-migration of young people aged 15-19. The population of 15-30-year olds living in Orkney is projected to fall by 12% between 2018 and 2041. This is broadly in line with the decline of 13% expected across the Highlands and Islands overall but is double the national projected decline of 6%.

Education

2.9 In 2017-18, 59% of school leavers in Orkney achieved SCQF Level 6 or above, lower than the proportions doing so regionally (61%) and nationally (62%). The vast majority (99%) of school leavers in 2017-18 went on to a positive destination – the highest proportion of all areas in the Highlands and Islands. They were markedly more likely to enter employment (44% did compared to 34% regionally and 23% nationally). Just over a third (34%) went on to Higher Education (HE) and 18% Further Education (FE) compared to 36% and 21% respectively regionally and 41% and 27% across Scotland⁴.

2.10 FE and HE provision in Orkney is delivered through Orkney College, which provides postgraduate and undergraduate degrees, HNDs, HNCs and SVQ courses across a range of subjects. The International Centre for Island Technology, part of Heriot-Watt University is also located in Orkney, providing five MSc programmes focusing on the marine environment and renewable energy.

2.11 In 2017-18 there were around 770 HE and 3,200 FE students from Orkney studying at universities or colleges in Scotland. Just over half (52%) of HE students were studying outside of the Highlands and Islands, slightly below the regional average of 54%. Those under the age of 25 were more likely to be doing so (67% of those aged 16-19 and 74% of those aged 20-24 compared to 31% of those aged 25+)⁵. A third (33%) of HE students from Orkney were enrolled at institutions within the Highlands and Islands, most locally (27%) and the remainder elsewhere in the region (6%). A further 14% were studying through the Open University, so likely to be based at home in Orkney. This is slightly higher than average across the Highlands and Islands (12%).

2.12 A higher proportion of FE than HE students from Orkney were studying within the Highlands and Islands (92%). This proportion is significantly higher than the regional average of 80%. The majority of those are studying locally within Orkney (87%). As for HE, younger FE students were more likely to be studying outwith the Highlands and Islands (13% of 16-19-year olds and 15% of 20-24-year olds are doing so compared to 7% of those aged 25+), although this is still below the regional average (20%).

Employment and economic activity⁶

2.13 Orkney has higher rates of overall employment and economic activity than across the Highlands and Islands and Scotland as a whole. In 2018, the employment rate in Orkney was 87.5%, compared to 78.9% across the Highlands and Islands and 74.1% across Scotland. A high proportion (89.9%) of 16-24-year olds living in Orkney were in employment, which far exceeds both the regional (67.1%) and national (57.2%) averages. This is perhaps reflective of the higher proportion of school leavers going directly into employment as well as the higher employment rate as a whole.

2.14 The economic activity rate for 16-24-year olds in Orkney (89.9%) was also markedly higher than the average for the Highlands and Islands (71.6%) and Scotland (63.3%). This mirrors the pattern for the overall economic activity rate in Orkney (87.5% compared to 81.3% regionally and 77.4% nationally). Reflecting this, there was a low rate of economic inactivity in Orkney (12.5% compared to 18.7% regionally and 22.6% nationally). Youth (16-24) economic inactivity was also substantially lower (around 10%) than both the average across the Highlands and Islands (28.4%) and Scotland (36.7%).

2.15 Data on unemployment is not available for Orkney, but regionally, the Highlands and Islands had lower rates of unemployment (2.9%) and youth (16-24) unemployment (6.3%) than Scotland (4.3% and 9.6% respectively) in 2018.

⁴ Scottish Government School leaver attainment and initial destinations: statistics, 2017-18

⁵ Analysis is based on data from the Scottish Funding Council for 2017-18

⁶ Data in this section is from the Annual Population Survey January to December 2018

3 KEY FINDINGS FOR ORKNEY

INTRODUCTION

3.1 This chapter provides the key findings from the survey of young people from Orkney. As with the region-wide report it looks at attitudes around staying and leaving, education, employment, community and culture and maximising opportunities. It focuses mainly on where there are differences in the views of young people from Orkney compared to the regional average, or variations between those living in different parts of Orkney.

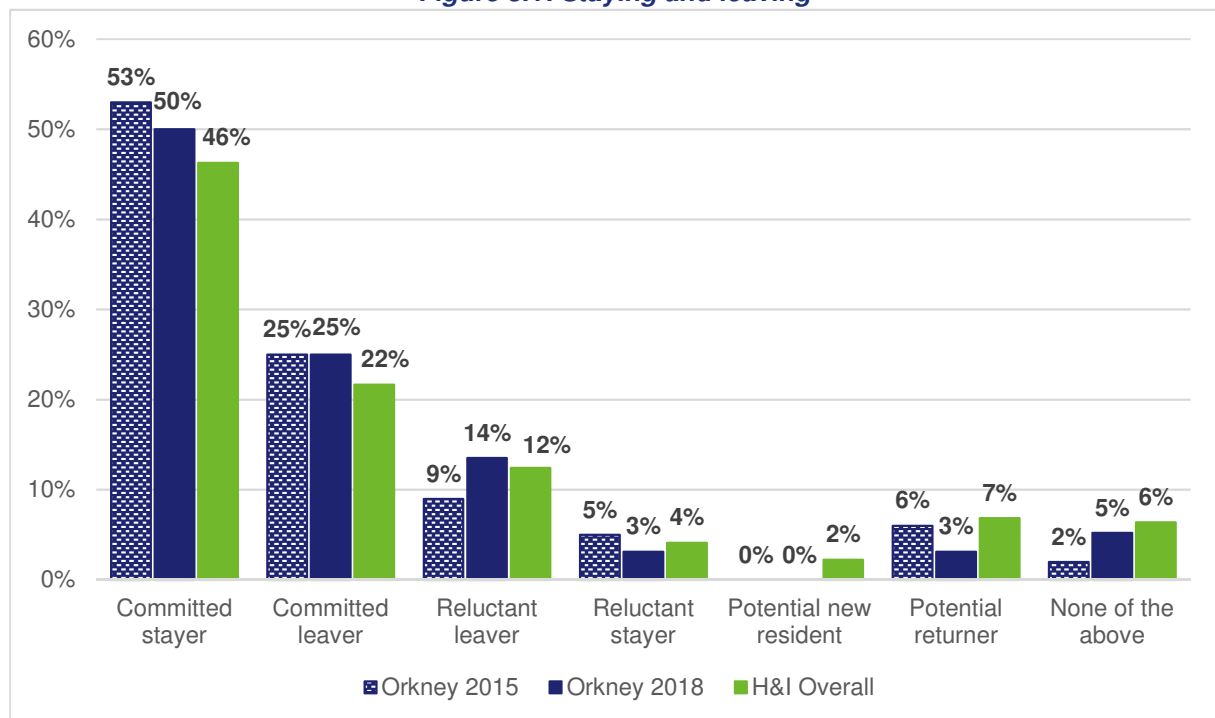
STAYING AND LEAVING

3.2 Young people in Orkney are more likely than those across the region overall to want to stay in the Highlands and Islands. Exactly half identified as committed stayers, which is three percentage points lower than in 2015. However, this is still above the regional figure of 46% (up from 36% in 2015).

3.3 The proportion of reluctant leavers increased by five percentage points to 14%, slightly above the 12% reported regionally (Figure 3.1).

3.4 At the same time, a slightly higher proportion of young people in Orkney plan to leave the region (25% identify as committed leavers compared to 22% regionally), and less see themselves as potential returners (3% compared to 7% regionally).

Figure 3.1: Staying and leaving

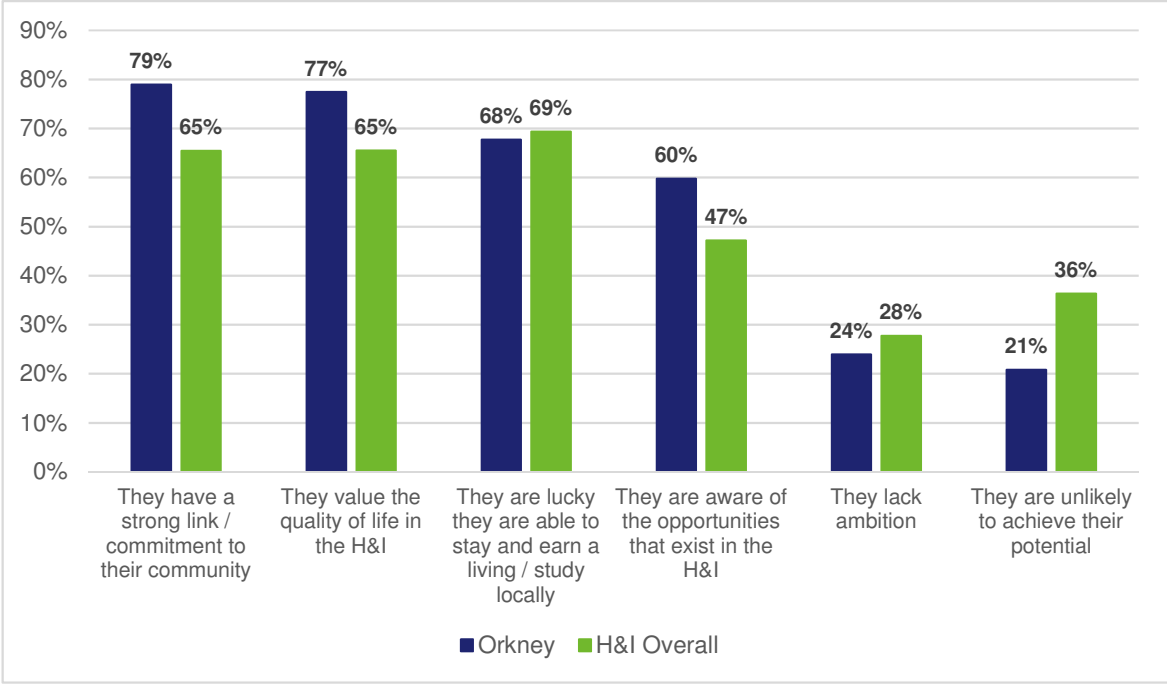


Source: ekosgen survey of young people, 2018 (Overall n=2,539, Orkney n=96)

3.5 Half of young people in Orkney want to live somewhere in the Highlands and Islands in 10 years' time. While this is lower than the 55% regionally, those in Orkney are more likely to want to live in their local area (40% compared to 32% regionally) and less likely to want to be living elsewhere in the region (10% versus 23%) than is evident across the Highlands and Islands overall.

3.6 Of all areas in the region, young people from Orkney have the most positive views of young people who stay in the Highlands and Islands post-school. They are more likely than average to agree that those who stay have strong links to their community (79% compared to 65% regionally), that they value the quality of life in the Highlands and Islands (77% versus 65%) and that they are aware of the opportunities that exist (60% versus 47%). Additionally, they are less likely to feel that those who stay are unlikely to reach their potential or lack ambition (Figure 3.2).

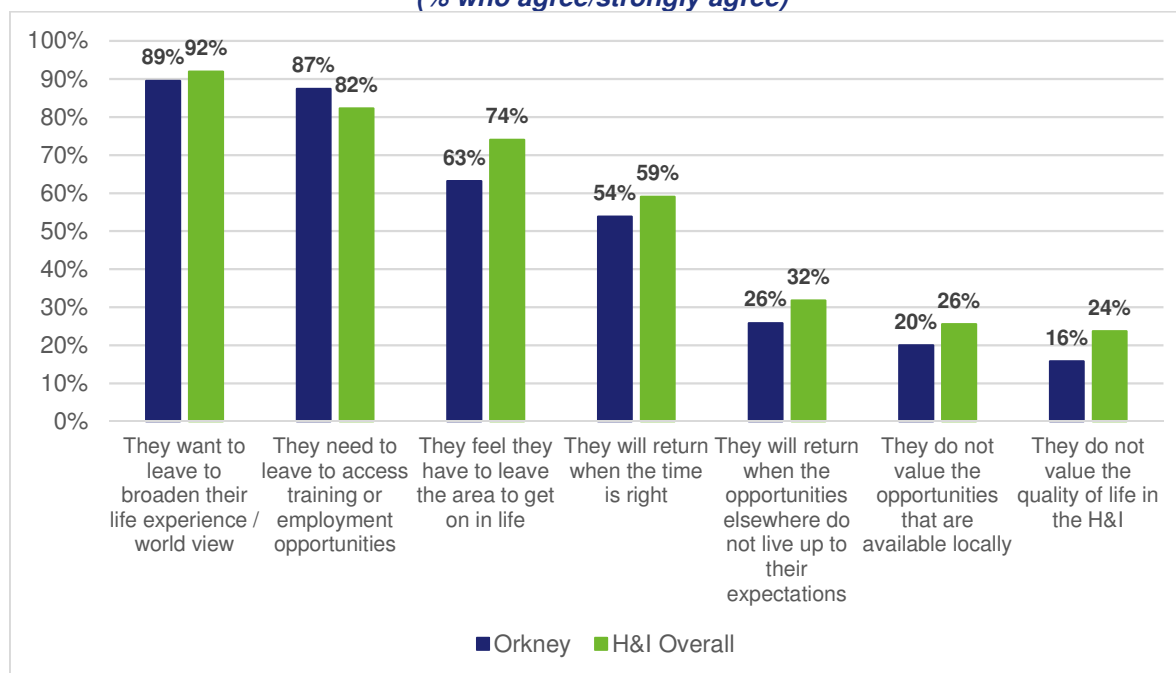
Figure 3.2: Perceptions about young people who stay in the local area (% who agree/strongly agree)



Source: *ekosgen survey of young people, 2018 (Overall n=2,527, Orkney n=96)*

3.7 Views on those who leave are more mixed. While they are more likely than average to think that those who leave the region need to do so to access training and employment opportunities (87% compared with 82% overall), they are less likely to feel that they have to leave to get on in life (63% compared to 74%). In terms of returning, they are less likely to agree that leavers will return when opportunities elsewhere don't live up to their expectations (26% compared with 32% across the Highlands and Islands) or when the time is right (54% versus 59% regionally).

**Figure 3.3: Perceptions about young people who leave the local area
(% who agree/strongly agree)**



Source: *ekosgen survey of young people, 2018 (Overall n=2,523, Orkney n=96)*

Factors influencing post-school decisions

3.8 Only a small number of school pupils in Orkney took part in the survey (35) so care needs to be taken in interpretation of their responses. Around three-quarters (74%) want to enter HE (60%) or FE (14%) after school, in line with the proportions regionally. However, comparing their views with those of all school pupils suggests some differences in the factors influencing post-school decisions.

3.9 Overall, experiences outside of school had the greatest influence on post-school decisions of school-pupils in Orkney, as it did regionally. However, school pupils from Orkney were more likely than average to say that their choice of subjects at school was good or very good (83% compared to 71%), and correspondingly less likely to feel that the range of subject available would limit their post-school options (37% agreed compared to 46% regionally).

3.10 Those in Orkney were also less likely to feel they have had limited careers advice (29% versus 41% regionally). Reflecting this they were more likely to feel they had a good understanding of the types of jobs industries in the Highlands and Islands need (48% versus 38% regionally) and of the jobs available in their local area (68% versus 61%).

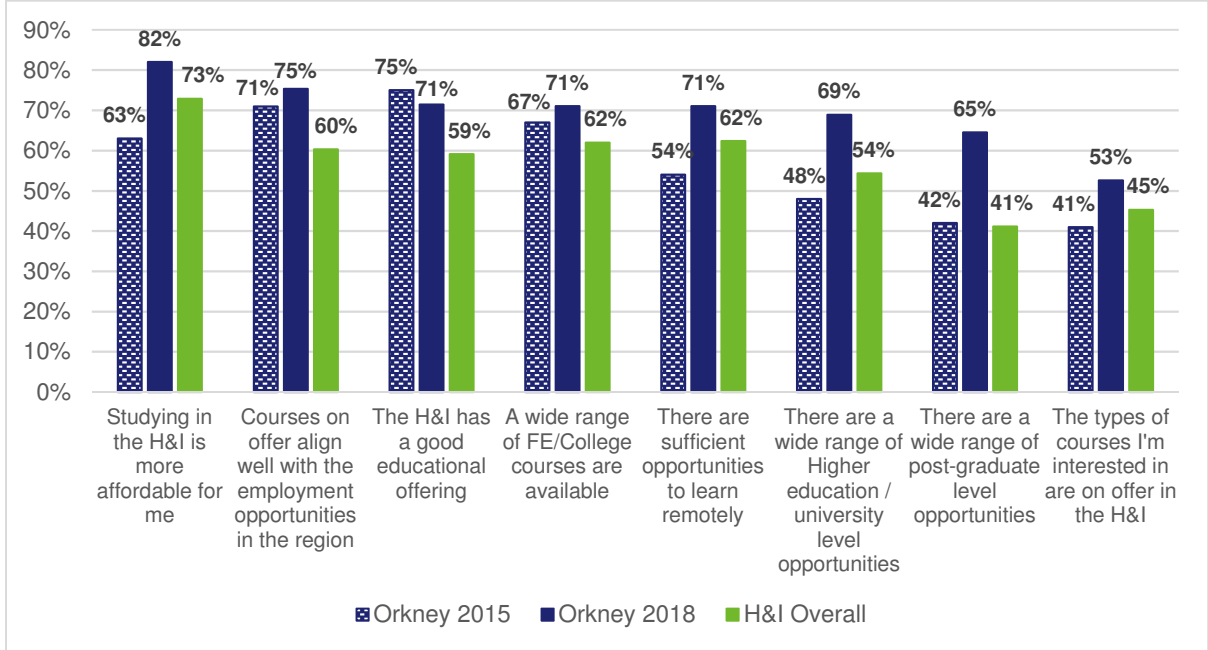
EDUCATION

3.11 Despite a decline in the proportion of young people in Orkney agreeing that the region has a good educational offering overall (71% compared to 75% in 2015), young people in Orkney still have the most positive views of all areas in the region about educational provision in the Highlands and Islands. This likely reflects the increased provision at education institutions in the region and mirrors the improved perceptions of the educational offering seen overall.

3.12 This positivity extends to all aspects of HE and FE provision explored, including study affordability, alignment with local employment opportunities, course offer, and remote learning opportunities. Most significant variations from regional responses relate to the range of post-graduate level opportunities (23 percentage points higher), HE opportunities and alignment between course offering and employment opportunities (both 15 percentage points higher) (Figure 3.4).

3.13 There were notable increases since 2015 in the proportion of young people in Orkney that feel there are a wide range of post-graduate and HE opportunities (up 23 and 21 percentage points respectively), that studying in the region is affordable (up 19 percentage points) and opportunities to learn remotely are sufficient (up 17 percentage points).

Figure 3.4: Qualities/characteristics of FE and HE in the Highlands and Islands (% agree strongly/slightly)



Source: *ekosgen survey of young people, 2018 (Overall n=2,262, Orkney n=86)*

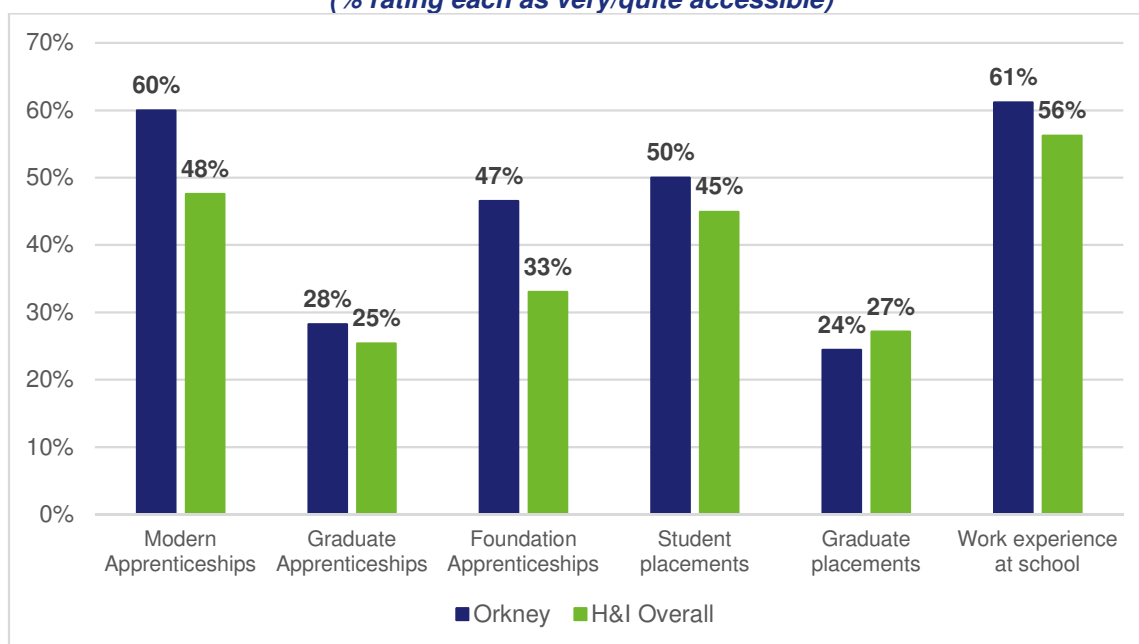
3.14 Whilst perceptions of the education offering have improved, there are still mismatches between what young people are looking for in a university or college and what they perceive to be available in the Highlands and Islands. Just over half (54%) of young people in Orkney agree that they can study the course they want to in the region, and 53% that there are institutions that specialise in their subject – the top two factors influencing their decisions on where to study.

3.15 Encouragingly, young people in Orkney are more likely to feel that the region has institutions with good academic reputations (72% compared to 63% regionally), a factor important to 92% of young people when choosing which college/university to attend.

3.16 While their awareness of graduate apprenticeships is in line with the regional average (both 64%), young people in Orkney have a greater awareness than regionally of modern (88% versus 84% respectively) and foundation (71% and 62%) apprenticeships. Higher proportions than regionally see foundation apprenticeships (64% versus 57%) and student placements (81% and 75%) as effective routes into employment, although most also recognise the value of modern (78% and 77%) and graduate apprenticeships (61% and 64%) in securing employment.

3.17 Slightly fewer young people in Orkney (24%) perceived graduate placements as accessible, compared with 27% regionally. However, they were more likely than average to cite apprenticeships, student placements and school work experience as accessible to them (Figure 3.5). Respondents living outside of Kirkwall are more likely to rate these opportunities as accessible than those in Kirkwall. However, as for the region overall, more needs to be done to encourage participation.

**Figure 3.5: Rating of access to education-related opportunities in local area
(% rating each as very/quite accessible)**



Source: *ekosgen survey of young people, 2018 (Overall n=2,261, Orkney n=86)*

EMPLOYMENT

3.18 Young people from Orkney are more likely to aspire to full-time employment and less likely to envisage starting a business than those living in any other area of the Highlands and Islands. Just under four-fifths (79%) want to gain or continue in full-time employment, whilst 11% would like to start up their own business compared to 71% and 19% regionally respectively.

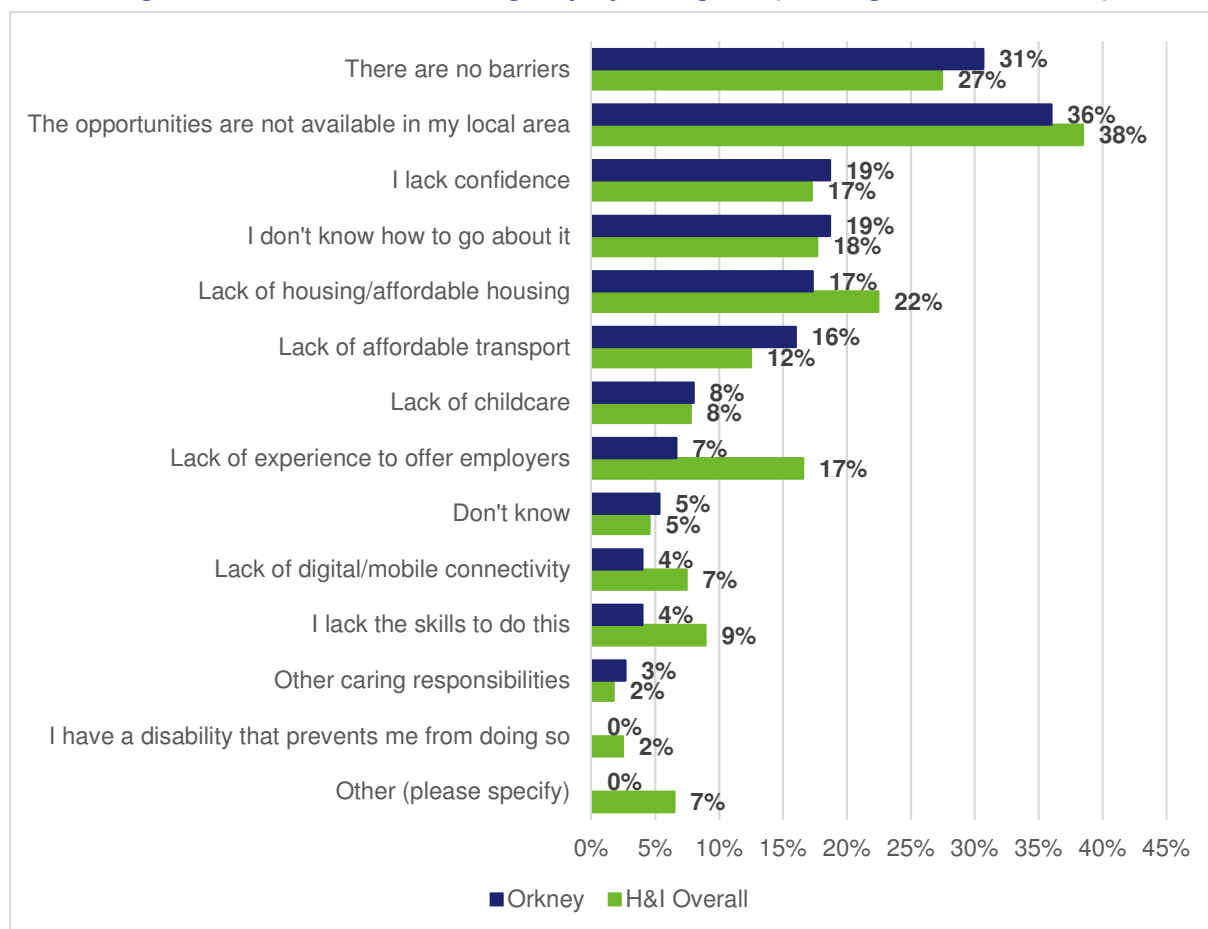
3.19 Reflecting this, young people in Orkney are less likely to feel they have the interest (47% compared to 53% regionally), business ideas (37% versus 44%) and confidence (32% versus 36%) to start up a business. However, they are more likely to agree that they have the knowledge (39% compared to 37% regionally) or access to finance (22% versus 17%) to do so.

3.20 As with regionally, most young people from Orkney report barriers to achieving their employment goals. However, they are less likely to do so than elsewhere in the Highlands and Islands (69% compared with 73% regionally).

3.21 Perceived barriers are similar to those experienced across the region overall with a lack of local opportunities cited most frequently (by 36% in Orkney and 38% regionally). However, they were less likely to see a lack of housing (17% versus 22% regionally), experience (7% compared to 17%) or skills (4% versus 9%) as barriers.

3.22 Within Orkney, those participating in the survey from outside Kirkwall were more likely than those in Kirkwall to agree that there are barriers to achieving employment goals, with a lack of affordable housing and transport particular barriers for them.

Figure 3.6: Barriers to achieving employment goals (% citing each as a barrier)

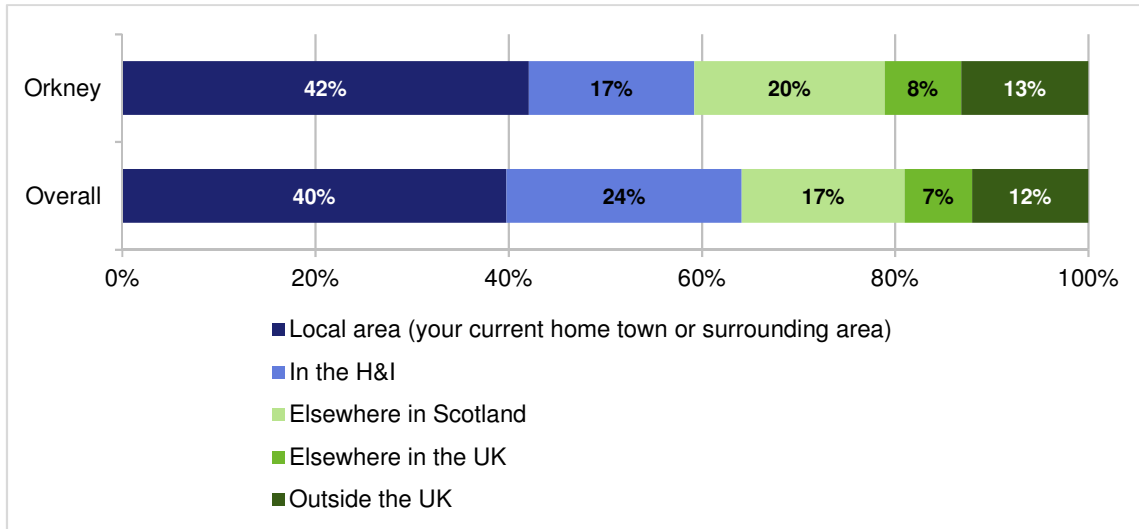


Source: *ekosgen survey of young people, 2018 (H&I Overall n=2,106, Orkney n=75)*

3.23 Around six in 10 young people in Orkney want to work somewhere in the Highlands and Islands in future (59%), lower than the regional average of (64%). The difference is driven by a lower proportion stating that they would like to work elsewhere in the region (17% compared to 24%) rather than a lower desire to work in their local area (42% versus 40% regionally). Within Orkney, respondents from Kirkwall (49%) are more likely to want to work in their local area than those living elsewhere (37%).

3.24 Since 2015 the proportion of young people from Orkney that want to work locally has reduced by six percentage points, whilst the percentage that want to work elsewhere in the Highlands and Islands has increased by eleven percentage points. Overall, more wish to work somewhere in the region now than in 2015 (59% compared to 54% in 2015).

Figure 3.7: Ideal work locations of young people

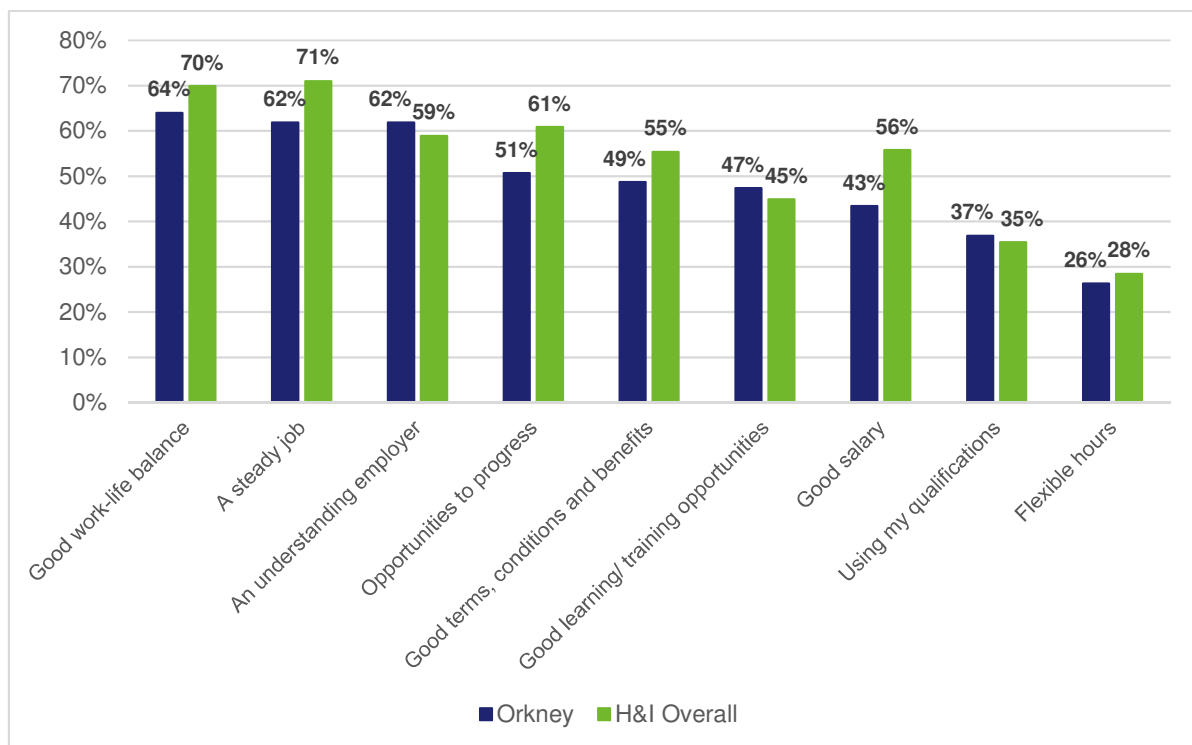


Source: ekosgen survey of young people, 2018 (Overall n=2,129, Orkney n=76)

3.25 A good work-life balance, steady job and understanding employer were the top three factors that young people in Orkney see as essential in a job (Figure 3.8). While those in Orkney tended to prioritise similar job qualities to those across the region overall, the proportions citing each as essential tended to be lower, particularly: a good salary (43% versus 56% regionally), opportunities to progress (51% compared to 61%), steady job (62% versus 71%), good terms, conditions and benefits (49% versus 55%) and a good work-life balance (64% versus 70%).

3.26 Young people in Orkney are more likely to say that what they are looking for in a job is available locally (63% agree compared to 58% regionally) and in the Highlands and Islands (65% versus 59%).

Figure 3.8: Job qualities sought by young people (% seeing each as essential)



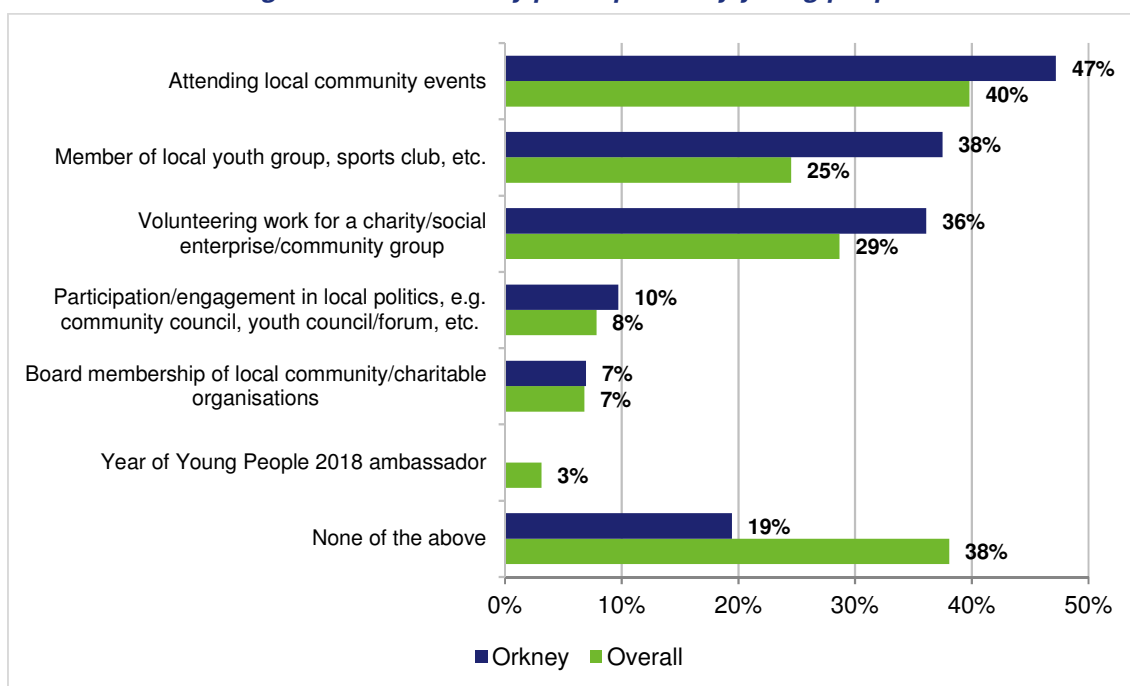
Source: ekosgen survey of young people, 2018 (Overall n=2,135, Orkney n=76)

COMMUNITY AND CULTURE

3.27 Young people from Orkney have the highest rates of community participation across all areas of the region (81% compared to 62% regionally). (Figure 3.9). In contrast to a decline of nine percentage points regionally, participation levels amongst young people in Orkney have risen by three percentage points since 2015.

3.28 Higher levels of community participation were evident among those young people living outwith Kirkwall where 87% participate, compared with 72% of those living in the main town.

Figure 3.9: Community participation by young people



Source: ekosgen survey of young people, 2018 (H&I Overall n=1,949, Orkney n=72)

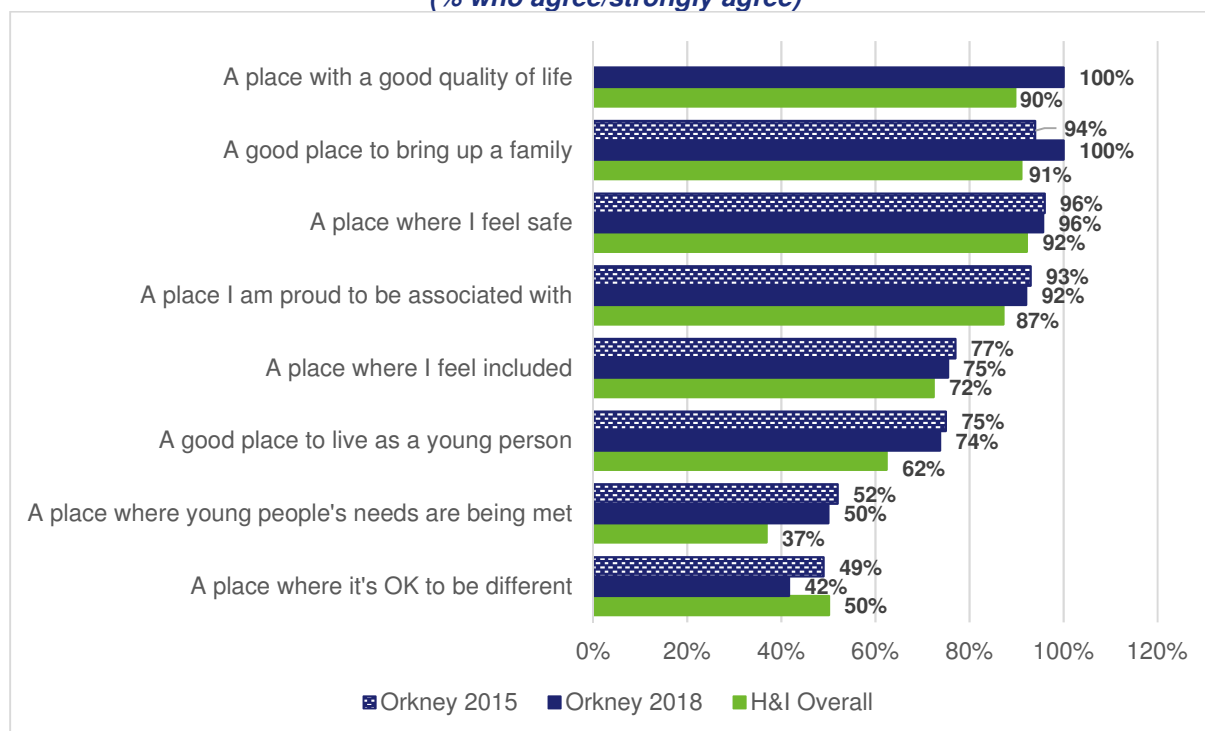
3.29 Young people in Orkney have extremely positive perceptions of their town or community, especially that it is a good place to bring up a family (100%), has a good quality of life (100%), is safe (96%) and is a place they are proud to be associated with (92%). A higher proportion than regionally, agree that their local area is a good place to be as a young person (74% compared with 62% overall) (Figure 3.10).

3.30 The only factor young people in Orkney rate less favourably than regionally is that their local area is a place where it's OK to be different – 42% agreed compared with 50% overall.

3.31 Since 2015, the proportion of young people in Orkney agreeing that it is OK to be different declined by seven percentage points while the proportion agreeing that it is a good place to bring up a family increased by six percentage points. Otherwise, views on their town and community were broadly in line with findings for 2015 (Figure 3.10).

3.32 Young people in Orkney are less likely to identify barriers to participation in arts, leisure and culture than their counterparts elsewhere in the Highlands and Islands. Where they do identify barriers, they tend to be around lack of availability, variety and cost.

**Figure 3.10: Perceptions of the town or community by young people
(% who agree/strongly agree)**



Source: *ekosgen survey of young people, 2018 (Overall n=1,965, Orkney n=72)*
 Note: Views on 'a place with a good quality of life' were not asked in 2015

MAXIMISING OPPORTUNITIES

3.33 Young people from Orkney are slightly more likely than their counterparts across the Highlands and Islands to believe that people must make compromises to live, work and study in the region (89% stated this compared with 87% overall).

3.34 Young people in Orkney are more likely than average to identify compromises around education and employment. Around three-quarters (74%) said that there are fewer courses on offer at college/university, compared with 61% of all survey respondents. They are less likely than regionally to think that living in the Highlands and Islands means settling for a lower salary (41% versus 46% overall), but more likely to say that there are fewer job (79% compared to 76%) and career progression (69% versus 62%) opportunities, and that people have to accept working below their qualifications and skills level (43% compared to 40%).

3.35 Reflecting earlier findings about housing being less likely to be perceived as a barrier to employment, markedly fewer of these young people see accommodation (14% compared to 27% regionally) as a compromise that people generally have to make to live in the Highlands and Islands.

3.36 In terms of compromises that young people have already made or would be prepared to make to live in the Highlands and Islands, these relate mainly to travel and transport (67% compared with 61% overall) and limited mobile connectivity (51% versus 45%). Digital connectivity is another factor which a higher proportion than regionally feel they have already compromised on (42% versus 37%).

3.37 Accommodation and availability of college/university courses were the two key areas that young people in Orkney stated they were not prepared to compromise on. This was reported by 42% for each, compared with 34% and 37% regionally. Exactly half did not regard quality of life as a factor that required compromise, higher than the 44% reported regionally.

Table 3.1: Making Compromises to live in the Highlands and Islands

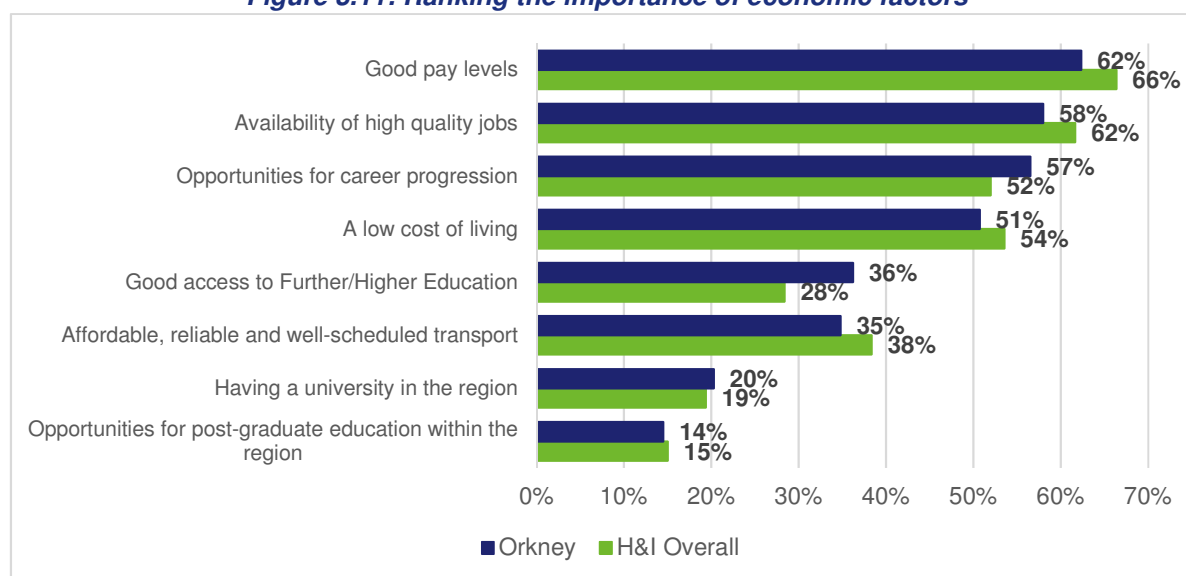
	I have already made	I would be prepared to make	I would not be prepared to make	I do not think this compromise exists
Accepting that transport and travel is more difficult and expensive	67%	19%	7%	7%
Having limited mobile connectivity	51%	25%	5%	19%
Having limited access to amenities, events, services and leisure facilities	44%	33%	12%	11%
Having limited digital connectivity	42%	26%	11%	21%
Having fewer job opportunities and choices	39%	25%	32%	5%
Having fewer opportunities for career progression	32%	21%	39%	9%
Having fewer courses on offer at college/university	26%	26%	42%	5%
Settling for a lower salary	25%	25%	35%	16%
Working below my qualification and skills level	21%	29%	39%	11%
Living in accommodation that doesn't fully meet my needs	16%	11%	42%	32%
Having a lower quality of life	9%	2%	39%	50%

Source: ekosgen survey of young people, 2018 (Orkney n=58)

ENABLING OPPORTUNITIES

3.38 Young people in Orkney have similar economic priorities as those living elsewhere in the Highlands and Islands in terms of what would make the region more attractive to young people. Good pay levels (62%), availability of high quality jobs (58%), opportunities for career progression (57%) and a low cost of living (51%) were cited as most important. These were also the top four factors regionally, although cost of living was ranked more highly than career progression opportunities. A higher proportion of young people from Orkney cited good access to FE/HE as important (36% compared to 28% overall) (Figure 3.11).

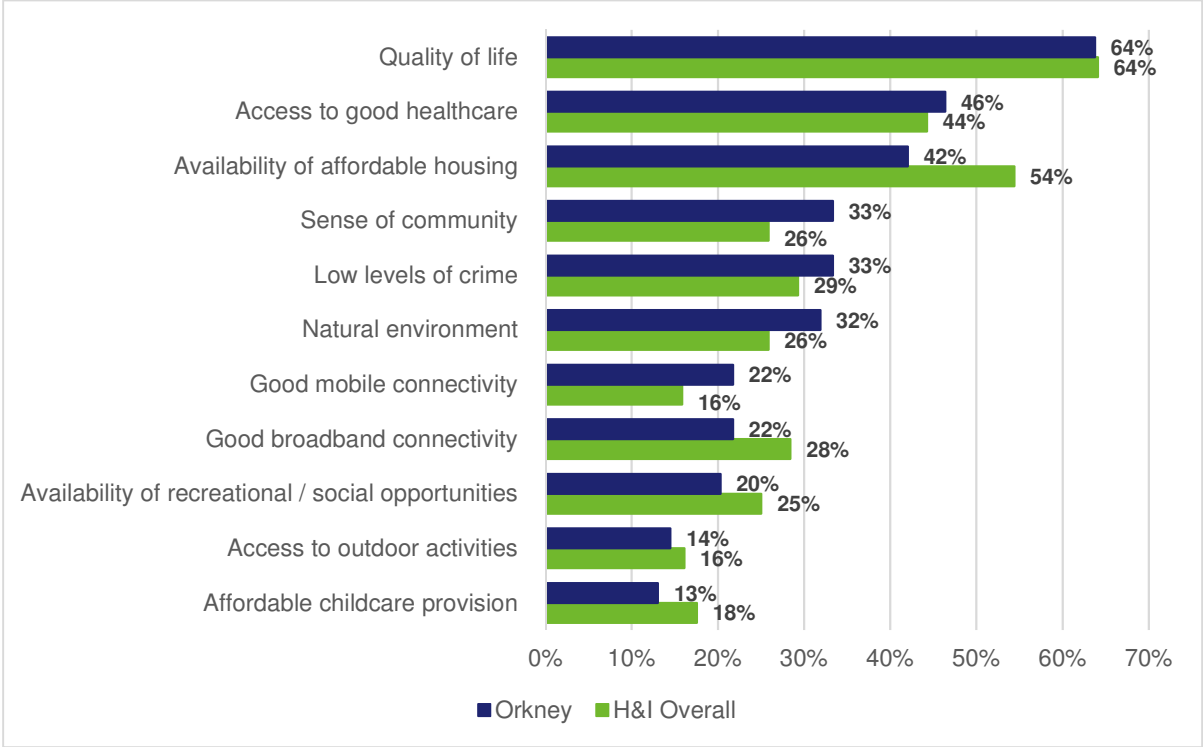
Figure 3.11: Ranking the importance of economic factors



Source: ekosgen survey of young people, 2018 (H&I Overall n=1,828 Orkney n=69)

3.39 Young people from Orkney are most likely to prioritise quality of life (64%), access to good healthcare (46%) and availability of affordable housing (42%) as the social factors that will make the Highlands and Islands more attractive. This is broadly similar to the regional picture, although the proportion in Orkney that prioritise affordable housing is twelve percentage points lower than overall. Young people from Orkney are also more likely to prioritise a sense of community: 33% did so compared to 26% of all respondents.

Figure 3.12: Ranking the importance of social factors



Source: ekosgen survey of young people, 2018 (H&I Overall n=1,805 Orkney n=69)

3.40 In line with the regional average, more than half (54%) of young people in Orkney think that the Highlands and Islands is a better place to live than it was five years ago, up from 46% in 2015. Thirty-five percent are unsure and 12% do not think the region has improved (32% and 14% regionally).

CONCLUDING REMARKS

3.41 Young people in Orkney have some very strong and positive views on their local area and the Highlands and Islands overall, even more so than in 2015. They are more positive than regionally about the educational offering in the region, employment opportunities and about their local community. There are high levels of community participation, particularly amongst those living outside of Kirkwall, and a strong attachment to their local area. More young people in Orkney are committed to staying in the Highlands and Islands, particularly locally, than is evident across the region overall.

3.42 However, many still do not feel that they can study the course they want to in the region or that there are institutions that specialise in their chosen subjects and lack of local opportunities remains a key barrier to achieving employment goals. Those living outside of Kirkwall are more likely to perceive barriers to employment than those in Kirkwall, particularly a lack of affordable housing and transport. As for the region overall, employment-related factors are seen as essential to make the Highlands and Islands attractive to young people, as is the quality of life and access to good healthcare and affordable housing. These young people are also more likely than regionally to cite a sense of community as an important factor in regional attractiveness.

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