

MY LIFE IN THE HIGHLANDS AND ISLANDS RESEARCH

Orkney

Summary report

October 2022



Highlands and Islands Enterprise
Iomairt na Gàidhealtachd 's nan Eilean

EXECUTIVE SUMMARY – ORKNEY

This report presents the findings of a large-scale survey conducted by Ipsos on behalf of Highlands and Islands Enterprise (HIE) between 28th January and 25th March 2022. In total, 5,301 adults aged 16+ living in the Highlands and Islands of Scotland responded to the survey, including 420 in Orkney.

Connectivity and access to services

Most households in Orkney have a daytime bus service (71%), a hall/function room (70%), a primary school (69%), a convenience store (69%) and a post office (68%) available within a 15-20 minute walk. However, access to a primary school or a daytime bus service within this distance is lower than for the region overall. Less than half can access other key services and facilities explored within a 15-20 minute walk. Around three in five do not have a cottage or community hospital (62%), a recycling centre (60%) or a supermarket (57%) available locally.

Excluding those who don't know about service availability, 21% of households in Orkney cannot access a dentist and 9% a midwife or health visitor either within a 20-minute drive or online, higher than the region overall (15% and 5%).

Half of households in Orkney would find it difficult to have a takeaway delivered while around a quarter would find it difficult to stream a TV programme/film online or take out money from a cash machine (both 26%), similar to regionally.

Housing

Most households in Orkney (92%) say their housing situation meets their needs well, although they are more likely than average to say that their home is expensive to heat (61%).

They are also more likely to perceive a range of local housing challenges, including a shortage of housing generally (90%), not enough houses for rent at reasonable prices (88%), the right types of housing not available for local people (87%), local people can't afford to buy housing (86%) and too many houses are bought as second homes (77%) or used for short term holiday rents (71%).

Employment and training

A fifth (19%) of those in work in Orkney have more than one job (13% regionally). A fifth are self-employed and 15% would like to start their own business (compared with 19% and 12% overall). A third of those who have not accessed training would find it difficult to do so in person and 9% to do so online. Affordability was a greater barrier to accessing training for those in Orkney than regionally.

Impact of Covid-19 and transport

90% of households say goods and services are more expensive in their local area now than they were before the pandemic.

70% of residents rely on ferry services, and levels of satisfaction with frequency, cost and reliability are higher than regionally. While 43% rely on air services, satisfaction with the cost is lower than average. 44% say increased numbers of tourists have made it hard for local people to access ferry or air services.

Participation, pride and local decision making

71% of residents report taking part in activities in their local community, higher than regionally (55%). Most commonly these are: attending local community events, membership of local groups or sports clubs, and volunteering.

95% of residents express pride in living in Orkney, higher than in the region overall (88%), and more feel they are able to influence local decision making. However, around three in 10 do not, so there is still scope to improve feelings of influence.

Towards net zero

Households in Orkney are more likely than average to have an electric/hybrid car, although numbers are still relatively low (13% vs 7% regionally).

Use of green technologies as a source of home heating is also higher amongst households in Orkney, particularly air source heat pumps (36% use this technology compared to 7% regionally). 39% of households are planning energy efficiency improvements in the next two to three years, in line with the region overall.

Priorities for communities to thrive

Orkney residents are more likely than average to be optimistic about their community (69% vs 52% regionally). The top priorities for communities in Orkney to thrive are: housing for local families (59%), more job opportunities (28%) and local businesses/trades (24%). Housing for local families and improved mobile phone network coverage (17%) are higher priorities for Orkney residents than in the region overall.

ACCESS TO FACILITIES AND SERVICES (1)

Most households in Orkney have a daytime bus (71%), a hall/function room (70%), a primary school (69%), a convenience store (69%) and a post office (68%) available within a 15-20 minute walk. However, less than half can access other key services and facilities explored within this distance. Around three in five do not have a cottage or community hospital (62%), a recycling centre (60%) or a supermarket (57%) available within their local area.

26% OF HOUSEHOLDS SAY IT IS DIFFICULT TO STREAM A TV PROGRAMME OR FILM compared to 21% for the region overall

26% OF HOUSEHOLDS SAY IT IS DIFFICULT TO TAKE OUT MONEY FROM A CASH MACHINE in line with the region overall (28%)

50% OF HOUSEHOLDS SAY IT IS DIFFICULT TO HAVE A TAKEAWAY DELIVERED compared with 44% for the region overall

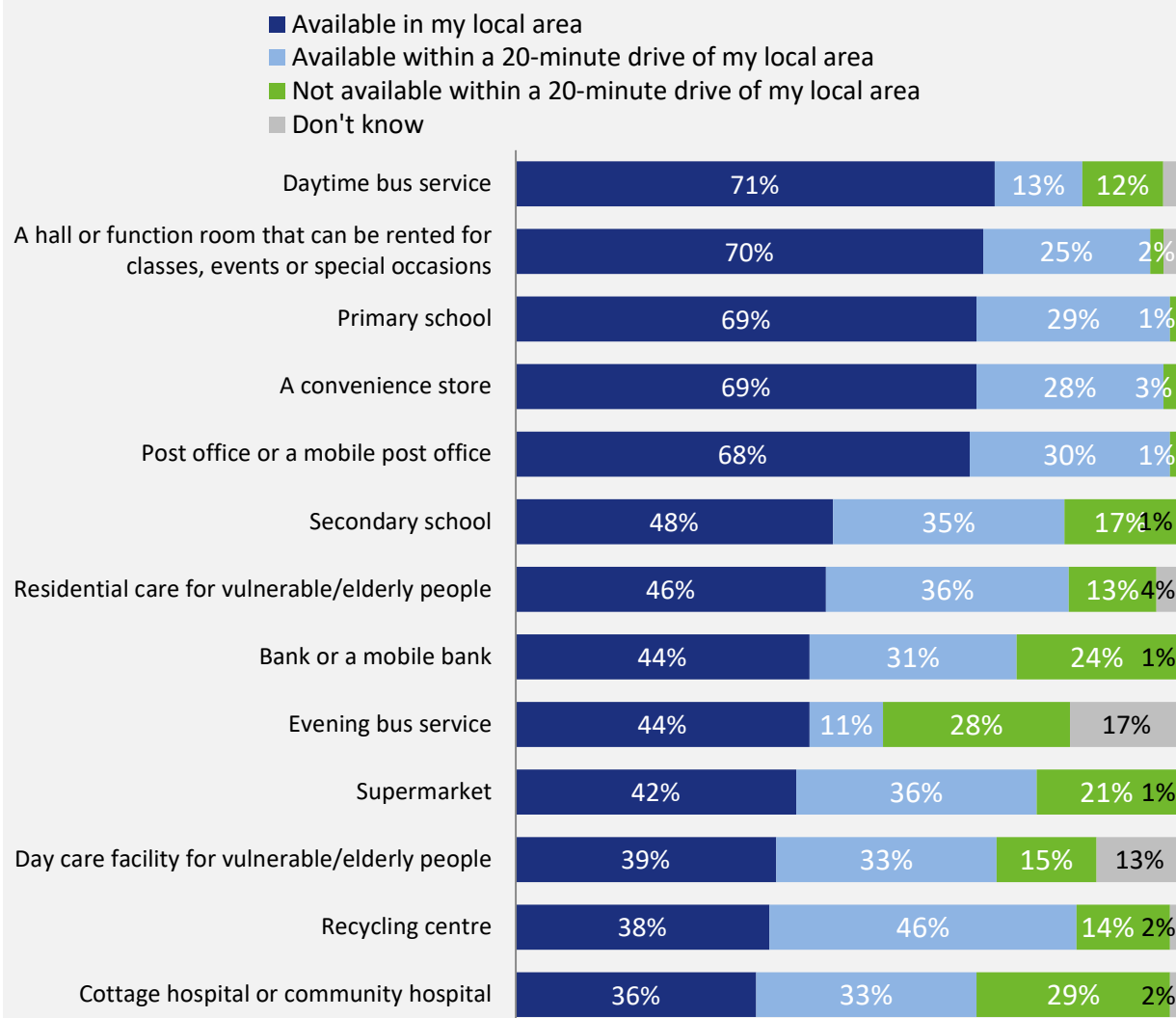
Households in Orkney are less likely to say they are able to access certain services within their local area compared to the Highlands and Islands overall, including:

- a **primary school** (69% vs 77%)
- a **daytime bus service** (71% vs 77%).

However, they are more likely to say they are able to access:

- **Day care for vulnerable/elderly people** (39% vs 27%).

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



Base: All households in Orkney (365); fieldwork = 28 January – 25 March 2022

ACCESS TO FACILITIES AND SERVICES (2)

Most households in Orkney have access to a GP (84%) permanently located within a 20-minute drive of their local area, and more than half have a dentist (62%), a midwife or health visitor (59%), a physiotherapist (53%) and home care services for vulnerable or elderly people (51%) permanently located within this distance. Fewer (39%) have mental health services located within their local area, although 32% don't know whether they can access these locally or not.

Excluding those who don't know whether each service is available locally, households in Orkney are more likely than those in the region overall to say they are **unable to access a dentist (21% vs 15%)** or a **midwife or health visitor (9% vs 5%)** either within a 20-minute drive or online.

Those unable to access other services is in line with the region overall – **mental health services (19% vs 20%)**, **physiotherapist (14% vs 11%)**, **home care services (7% vs 6%)** and **GP (2% vs 3%)**.

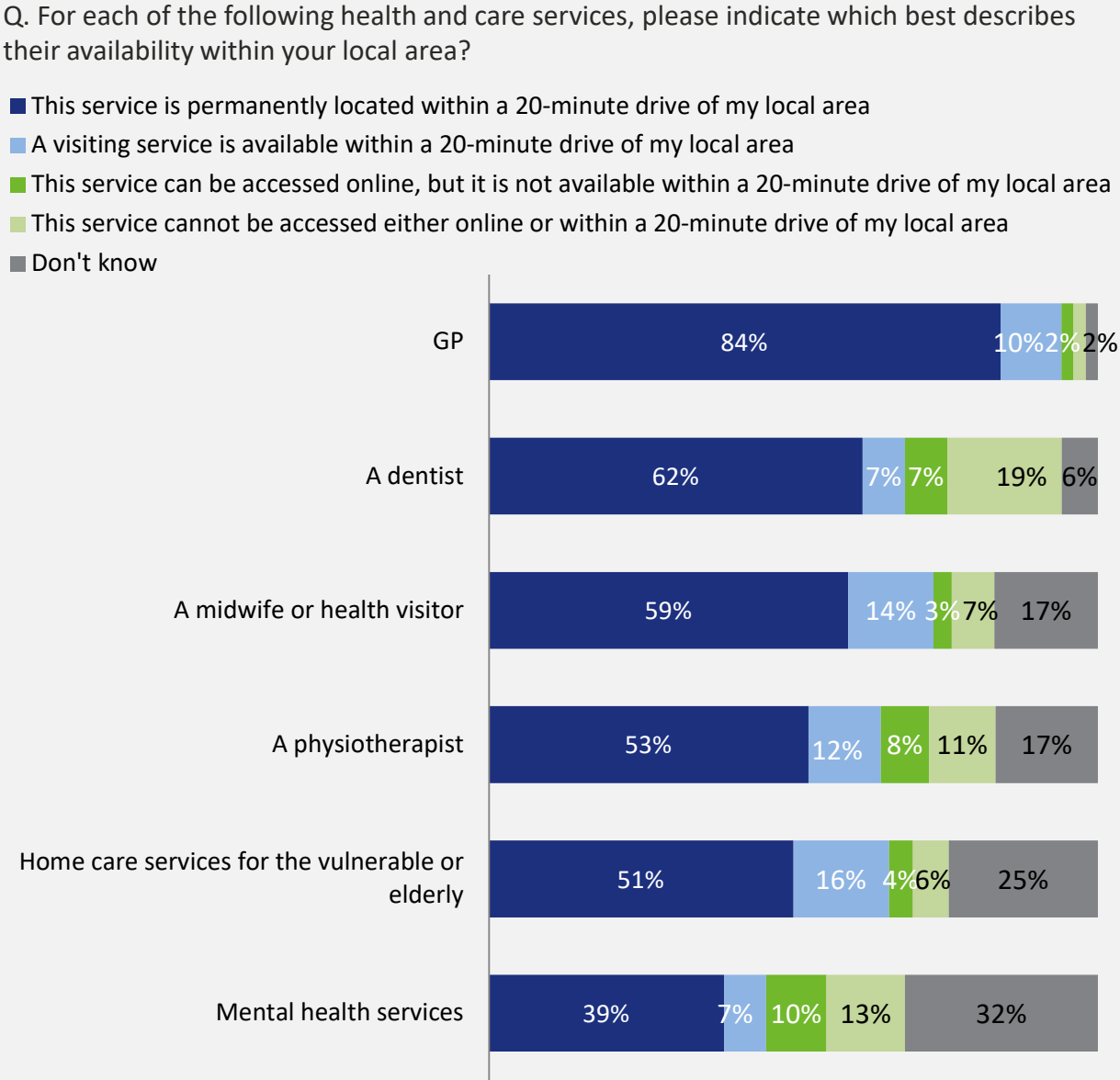
Reliance on and satisfaction with transport services

The vast majority of households in Orkney own at least one vehicle (83%) with 44% owning two or more (87% and 44% regionally) and 15% owning three or more (higher than the 10% regionally). However, a higher than average proportion do not own a car or van at all (16% vs 11% regionally).

- 87% rely on a car or van, in line with the region overall at 87%
- 70% rely on ferries, higher than in the region overall at 23%
- 43% rely on air transport, higher than regionally at 17%
- 21% rely on buses, in line with the region overall at 20%.

Levels of satisfaction with **ferry frequency, cost and reliability** (76%, 46% and 81% satisfied) are higher in Orkney than in the region overall (52%, 36% and 45% respectively). Also, more than average are satisfied with **bus frequency** (62% vs 47%), **cost** (59% vs 44%) and **reliability** (70% vs 52%).

While Orkney residents are also more likely to be satisfied with the **frequency of air services** (65% satisfied compared to 46% overall), they are less satisfied with the **cost of air services** (66% are dissatisfied compared to 41% in the region overall).



Base: All households in Orkney (365); fieldwork = 28 January – 25 March 2022

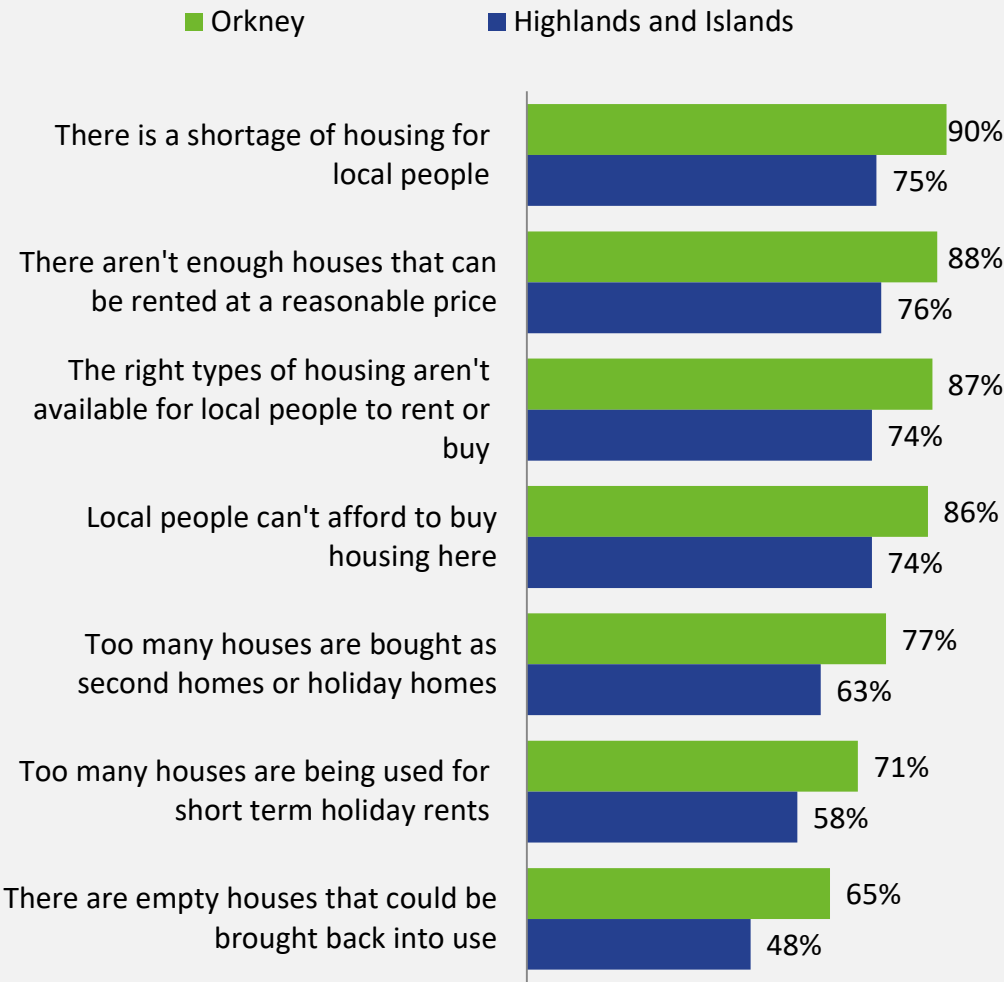
Note: Figures on access to health services (excluding those who don't know) were revised on 18 November 2022 following initial publication on 13 October 2022.

HOUSING SITUATION

Most households in Orkney (92%) say their housing situation meets their needs well (90% regionally). However, they are more likely than average to report that their home is expensive to heat (61% vs 50%). Households in Orkney perceive a range of housing challenges in their local area: they are more likely than average to agree that each of the statements explored describes their local housing situation somewhat/very well.

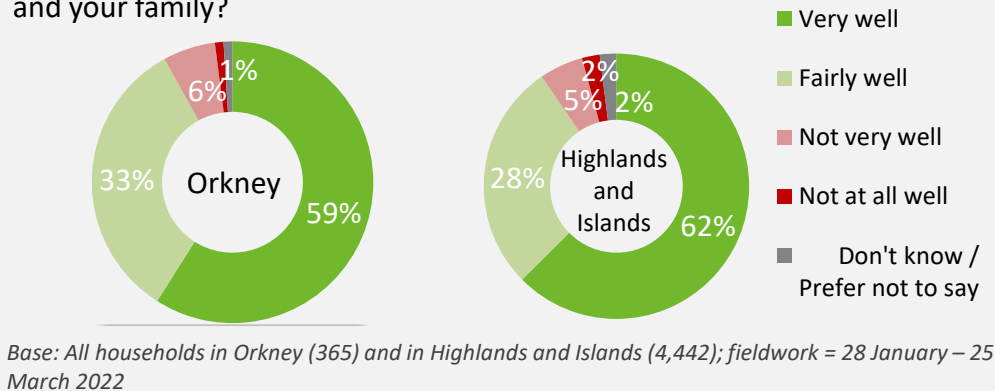
Q. To what extent does each of these describe the housing situation in your local area?

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

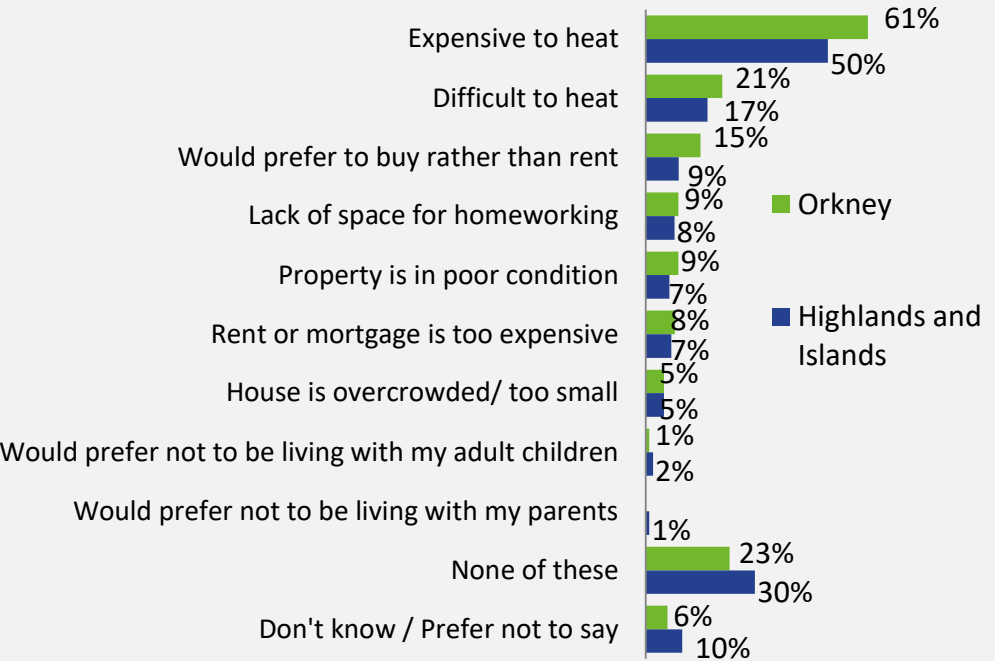


Base: All households in Orkney (365); fieldwork = 28 January - 25 March 2022

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



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



Base: All households in Orkney (365) and in Highlands and Islands (4,442); fieldwork = 28 January – 25 March 2022

EMPLOYMENT, ENTREPRENEURSHIP AND TRAINING

Around a fifth of those in work in Orkney are self-employed and 15% would like to start their own business, in line with the regional average. 63% say they are happy in their current job, also in line with the region overall. Almost four in ten (38%) residents in Orkney say they would find it difficult to access training due to the cost involved (compared to 23% regionally).

44% work in the private sector
(similar to the region overall at 49%)

48% work in the public sector
(similar to the region overall at 42%)

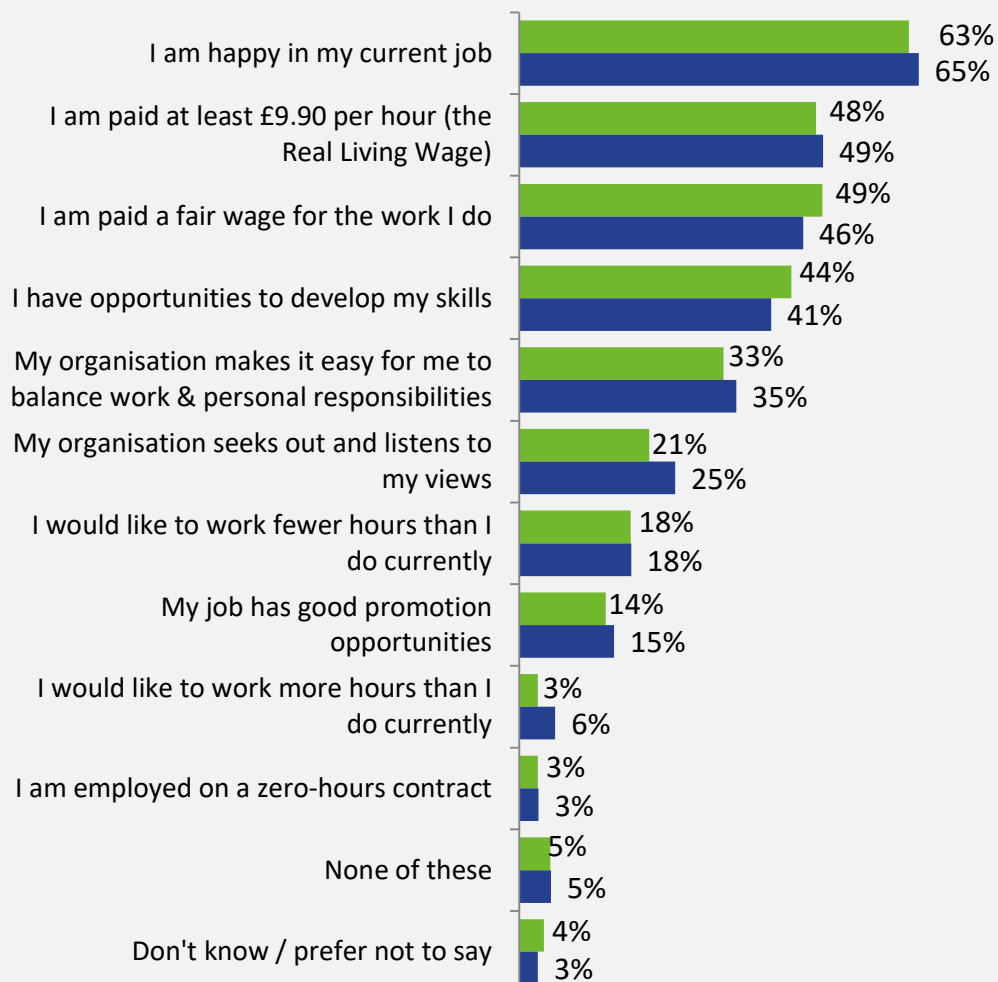
6% work for a charity/voluntary organisation
(in line with the region overall at 6%)

20% are self-employed
(in line with the region overall at 19%)

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

■ Orkney

■ Highlands and Islands



Base: all in work, aged 16+ in Orkney (224) and Highlands and Islands (2,240); fieldwork = 28 January - 25 March 2022

19% of those in work in do more than one job, higher than the region overall at 13%.

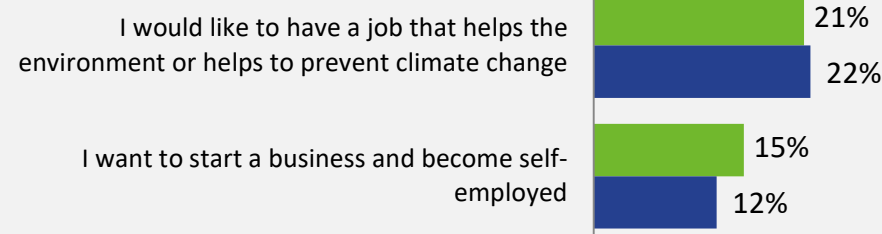
22% of those aged 65+ are still in work, again higher than the region overall (13%).

Work aspirations are in line with the region overall.

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

■ Orkney

■ Highlands and Islands



Base: all who are employees, looking for work or studying, aged 16+ in Orkney (181) and Highlands and Islands (2,031); fieldwork = 28 January - 25 March 2022

49% of those in work say that their job would be affected by the need to reduce carbon emissions, in line with the region overall (46%).

33% of Orkney residents who have not accessed training say they would find it difficult to do so in person from where they live, in line with the region overall (30%) and 9% say they would find it difficult to do so online (the same as in the region overall). The main barriers to accessing training are: having to spend time away from home (43%), cost not affordable (38%) and broadband not fast enough.

Residents in Orkney are **more likely than average to say that local training opportunities allow young people to stay in the area** (54% agree vs 37%).

IMPACT OF COVID-19 ON ACCESSING GOODS AND SERVICES

There is consensus among Orkney residents that it is more expensive to buy goods and services now than it was pre-pandemic, with 90% saying this is the case in their local area, in line with the region overall. Residents are more likely to say community events haven't restarted (82% vs 72%), that people have been moving to live here because they can work from home (59% vs 45%) and that increased numbers of tourists have made it hard for local people to access ferry or air services (44% vs 34%). More positively, a higher proportion of Orkney residents than regionally say that people are supporting local businesses more than they used to.



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



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



82% say community events have been cancelled and haven't restarted, higher than the region overall (72%).



59% say people have been moving to live here because they can work from home, higher than the region overall (45%).



80% feel people are supporting local businesses more than they used to, higher than the region overall (67%).



55% feel that businesses that closed because of lockdown haven't reopened, in line with the region overall (56%).



70% say it has been more difficult for households in Orkney to get tradespeople to do work around residents' houses, similar to the region overall (67%).



44% of households say increased numbers of tourists have made it hard for local people to access ferry or air services, higher than the region overall (34%).

PARTICIPATION, PRIDE AND LOCAL DECISION MAKING

Around 7 in 10 (71%) Orkney residents report taking part in activities in their local community, higher than regionally at 55%. Most commonly these were attending local community events, local groups or sports clubs or volunteering for a charity, social enterprise or community group. Residents in Orkney are more likely than those across the region overall to agree that they can influence local decision making (38% vs 29%), though there is still scope to improve feelings of influence as 28% disagree, and 30% neither agree nor disagree.

Participation



51%

ATTEND LOCAL COMMUNITY EVENTS
higher than the region overall



41%

ARE MEMBERS OF LOCAL GROUPS OR
SPORTS CLUBS
higher than the region overall



31%

VOLUNTEER
higher than the region overall



16%

ARE BOARD MEMBERS
higher than the region overall

Pride

95%

ARE PROUD TO LIVE IN ORKNEY
higher than the region overall (88%)

Local decision making



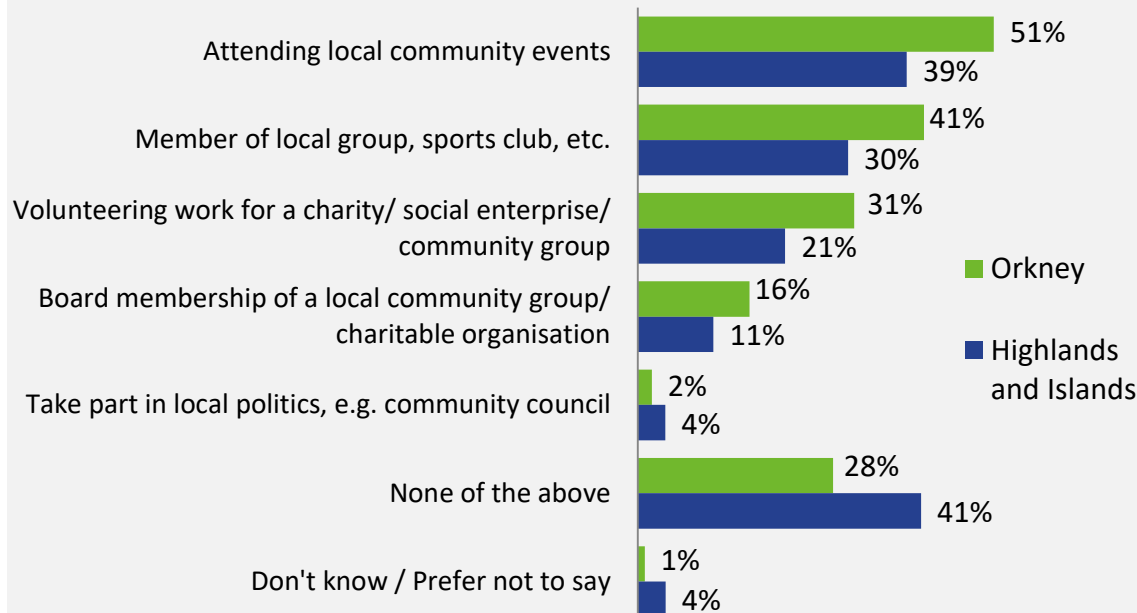
38%

AGREE THAT LOCAL PEOPLE CAN
INFLUENCE DECISION MAKING IN
THEIR LOCAL AREA
higher than the region overall

28%

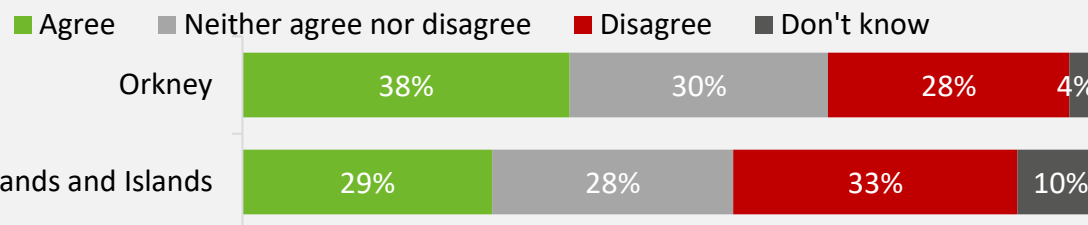
DISAGREE

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



Base: All residents, aged 16+ in Orkney (420) and Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

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



Base: All residents, aged 16+ in Orkney (420) and Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

TOWARDS NET ZERO – ENERGY SOURCES AND ELECTRIC VEHICLES

The most commonly used energy sources for heating homes are electricity, air source heat pumps and oil, with the use of electricity and air source heat pumps higher than in the Highlands and Islands overall, the latter being the most commonly used green technology. More households than average in Orkney use coal (17% vs 12% overall), their own wind generator (6% vs 1%), and ground source heat pumps (3% vs 1%). Households in Orkney are more likely than average to currently have an electric/hybrid car.



More households in Orkney live in a detached house (65%) compared to the average across the region (47%). Fewer live in a semi-detached house (19% vs 26% overall), a terraced house (5% vs 11%) or a flat in a purpose-built block (4% vs 8%).



Electric cars

13% of households in Orkney own or lease an electric or hybrid car (higher than regionally at 7%). A further 7% say they plan to buy or lease one, in line with the region overall (6%). A quarter of households (24%) have thought about buying or leasing an electric/hybrid car and decided against it, and a fifth (20%) have not yet made a decision (vs 26% and 24% regionally).

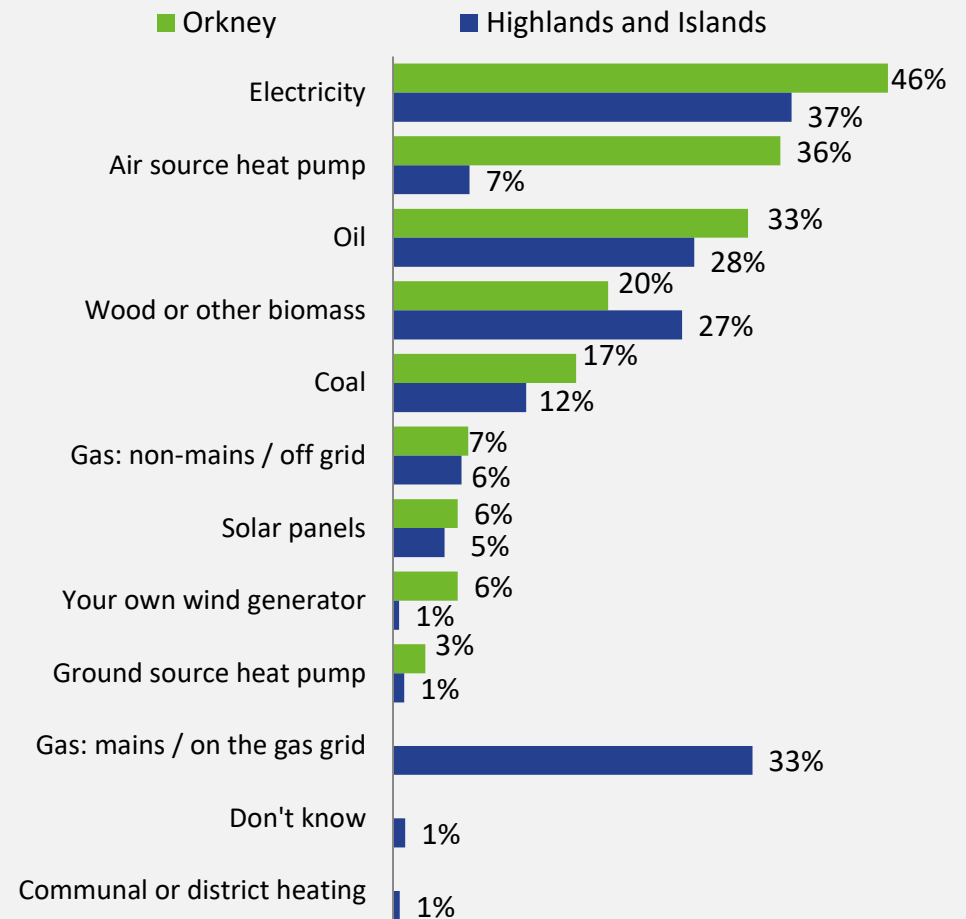
Consistent with the region overall, cost (84%), range (73%) and (77%) are key concerns in relation to owning or leasing electric or hybrid cars. Concerns are lower than average in terms of the availability of public charging points (60%, compared to 76%).

61% of households in Orkney would find it easy to charge an electric vehicle on the street or at a car park, higher than in the region overall at 26%. Around a quarter (26%) would find it difficult to do so (57% regionally).

NOTES

In this report, green technology refers to air/ground source heat pumps, solar panels and wind generators. There is no access to the mains Gas Grid in Orkney, hence lack of use as a source heating.

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



Base: All households in Orkney (365) and Highlands and Islands (4,442); fieldwork = 28 January - 25 March 2022

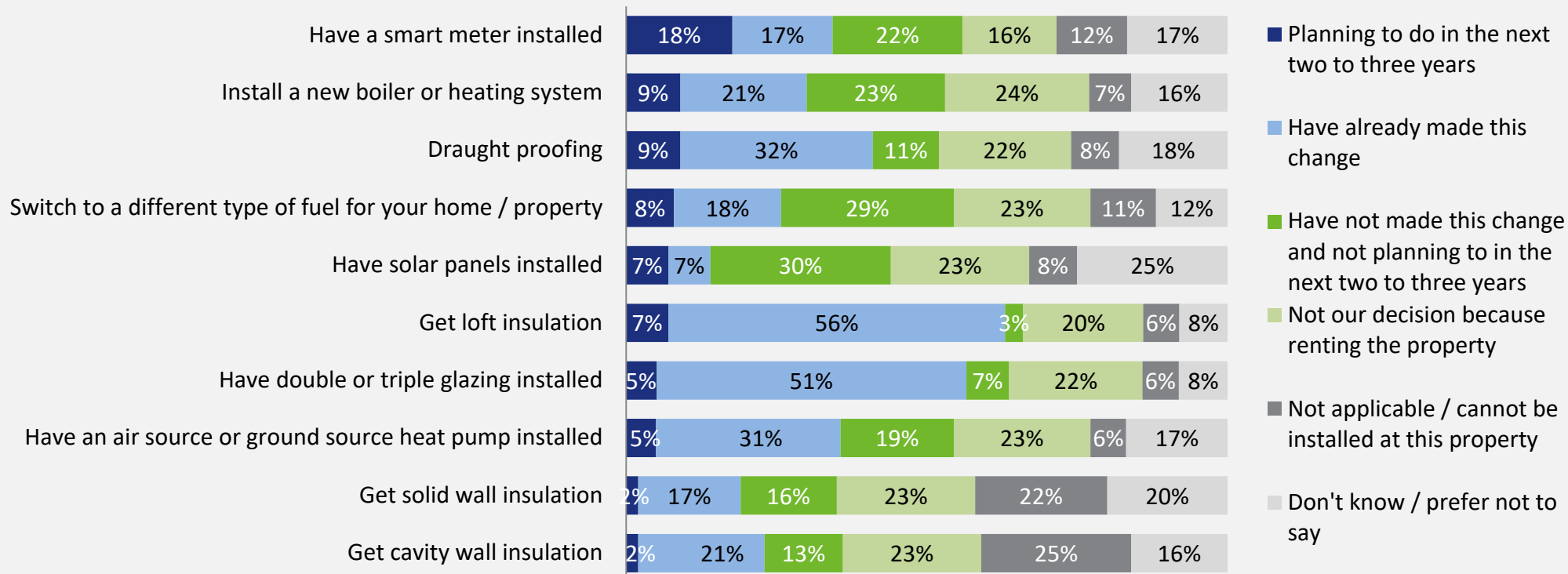
TOWARDS NET ZERO – ENERGY EFFICIENCY IMPROVEMENTS

Households in Orkney are just as likely to be planning energy efficiency improvements as those in the region overall. The most commonly planned actions are installing a smart meter (18%), installing a new boiler or heating system (9%), draught proofing (9%), and switching to a different type of fuel (8%).

The main reasons households in Orkney are unlikely to change the type of fuel they use to heat their property in the next two to three years are: because it is too expensive (48%), they don't want to (32%) and there not being enough financial support (28%).

39% OF HOUSEHOLDS ARE PLANNING TO MAKE AT LEAST ONE ENERGY EFFICIENCY IMPROVEMENT IN THE NEXT TWO TO THREE YEARS, SIMILAR TO THE REGION OVERALL AT 36%

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



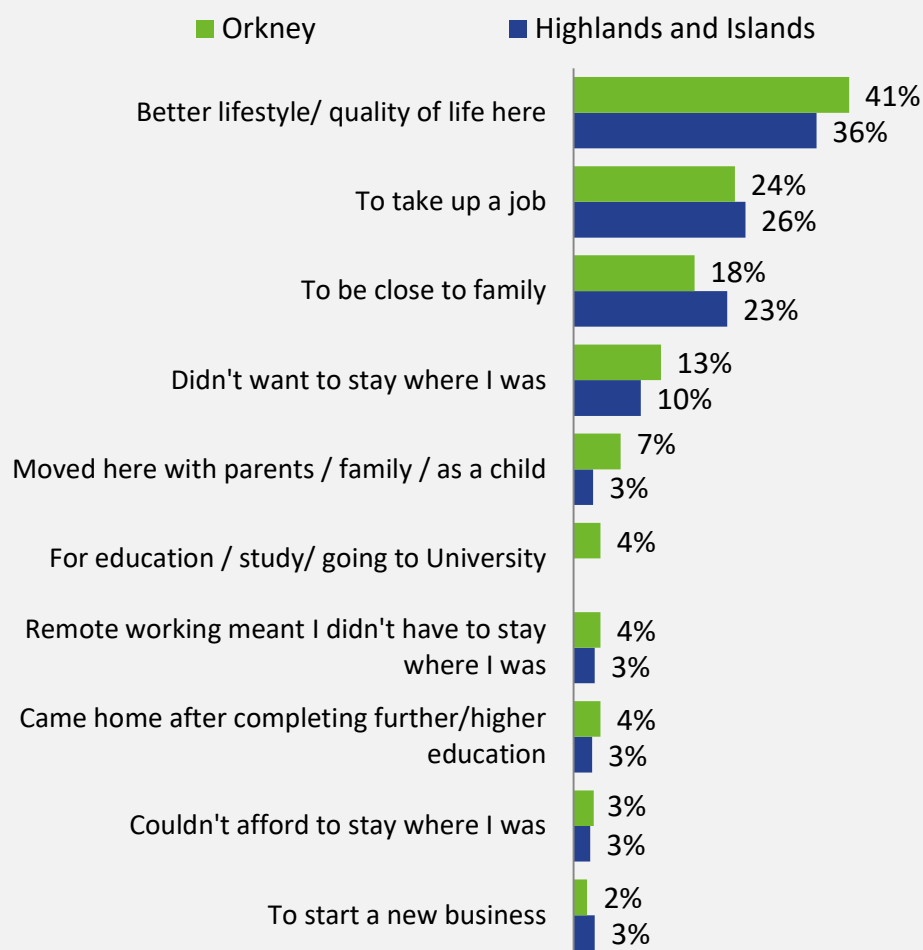
Base: All households in Orkney (365); fieldwork = 28 January - 25 March 2022

REASONS FOR MOVING TO THE AREA

Among residents in Orkney who have not always lived in the Highlands and Islands, the main reason for moving to the region was for a better quality of life, in line with the regional average.

Households in Orkney are more likely to say more people are moving there for new job opportunities and that new businesses are starting up, while they are less likely to say that people are leaving their local area because they can't find work.

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



Base: All residents who have not always lived in the Highlands and Islands, aged 16+ in Orkney (254) and in Highlands and Islands (3,449); fieldwork = 28 January - 25 March 2022

Among those in Orkney who have not always lived in the region:



41% say they moved to the region for a better lifestyle/quality of life, similar to the region overall



24% moved to take up a job, similar to the region overall



18% say they moved to be close to family, similar to the region overall

Among all households in Orkney:

61%

say most of the people who move here are retired, similar to the region overall at 56%

57%

say more people are moving here for new job opportunities, higher than the region overall at 29%

56%

say new businesses are starting up, higher than the region overall at 46%

36%

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

PRIORITIES FOR COMMUNITIES TO THRIVE

Residents in Orkney are more optimistic about their community than those in the region overall. The top priorities for communities in Orkney to thrive are: housing for local families, more job opportunities, local businesses and trades and improved broadband. Housing for local families and improved mobile phone network coverage are higher priorities for Orkney residents than regionally.

Optimism

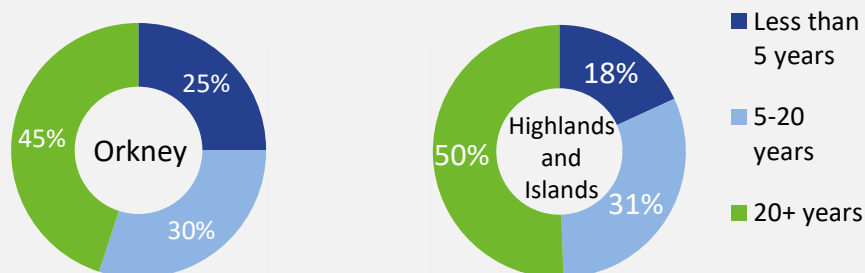
69% of Orkney residents are optimistic about their community, higher than the region overall (52%), while 12% are pessimistic (16% regionally).

Length of residence and future intentions

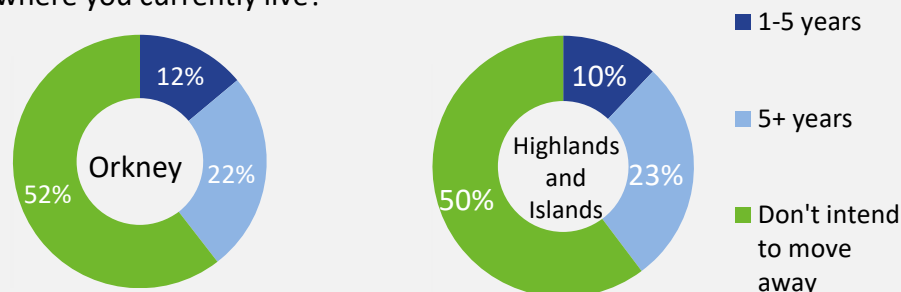
45% of Orkney residents have been living in their local area for more than 20 years. 30% have lived there for between 5 and 20 years. 25% have lived there for less than five years, higher than the region overall at 18%.

In terms of future intentions, 52% of residents don't intend ever to move away from their local area, similar to the regional average of 50%.

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



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



Base: All residents, aged 16+ in Orkney (420) and the Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

Priorities

Housing for local families (59% vs 47%), improved mobile phone network coverage (17% vs 11%) and better childcare provision (11% vs 7%) are higher priorities for communities in Orkney, compared to those in the region overall.

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



Base: All residents, aged 16+ in Orkney (420) and Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

METHODOLOGY

Sampling

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

Method

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

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

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

Fieldwork

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

In Orkney, 420 interviews were achieved.

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



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