

OUR NEXT GENERATION

Young People in Orkney
Attitudes and aspirations.
Research report
September 2015



TABLE OF CONTENTS

1	INTRODUCTION	4
	APPROACH	4
	STUDY CONTEXT	4
	ORKNEY CONTEXT	4
2	STAYING AND LEAVING	7
	SELF-IDENTIFICATION	7
	PERCEPTIONS OF STAYERS AND LEAVERS	8
	ASPIRATIONS OF SCHOOL LEAVERS	10
	FACTORS INFLUENCING DECISIONS AFTER LEAVING SCHOOL	11
3	LEARNING IN ORKNEY	13
	FURTHER AND HIGHER EDUCATION PROVISION	13
	AWARENESS OF UHI AND ITS OFFER	14
	INVERNESS CAMPUS	16
	GRADUATE PLACEMENTS	17
4	WORKING IN ORKNEY	19
	EMPLOYMENT-RELATED FACTORS IN THE LOCAL AREA	19
	VIEWS ON H&I GROWTH SECTORS	23
	DESIRED QUALITIES IN EMPLOYERS	24
5	LIFE ASPIRATIONS IN ORKNEY	26
	HOUSING	26
	TRANSPORT	27
	DIGITAL CONNECTIVITY	29
	ARTS, LEISURE AND CULTURE	31
	COMMUNITY	32
6	FUTURE ASPIRATIONS OF YOUNG PEOPLE IN ORKNEY	34
	MAKING ORKNEY AN ATTRACTIVE PLACE TO LIVE IN	34
	FUTURE ASPIRATIONS	36
	HOW THE H&I HAS CHANGED	37
7	CONCLUSIONS	38
	KEY SUMMARY FINDINGS	38
	CONCLUDING REMARKS	41
A.	ANNEX 1: SURVEY RESPONSE PROFILE	43
	NUMBER OF RESPONDENTS	43
	AGE	43
	GENDER	43
	GEOGRAPHY	44
	STATUS	44
	SUMMARY	44

1 Introduction

1.1 This report presents the findings of a wide-ranging study to explore the attitudes and aspirations of young people aged 15-30 in relation to the Highlands and Islands (H&I) of Scotland, with a particular focus on young people in Orkney. Overall, a total of 4,409 young people from within and outwith the H&I participated in the research, sharing their views on the region as a place to live, work and study. This summary report analyses the views of 216 young people living in Orkney who contributed to the research.

1.2 The report presents findings for Orkney as a whole, providing comparisons with the results for the wider H&I. Where possible, analysis is also provided for young people living in Kirkwall, highlighting where their views differ from those living elsewhere in Orkney.

Approach

1.3 The approach made extensive use of social media, through which young people were invited to complete an online survey, and an online discussion portal allowed young people to provide further insight on their views. Two high schools in Orkney participated in the study. The study also gathered perspectives from stakeholders from both within and outwith the H&I region, including representatives from public sector and other organisations.

Study Context

1.4 The H&I have a deficit of young people, and there has traditionally been an outflow of young people from the region; this has also been the case with Orkney. There are a wide range of factors that impact on the choices and aspirations of young people, including educational and employment opportunities, the cost of living, transport, housing, cultural and connectivity issues. There are also strong local factors affecting decision-making, including close ties with their community for many young people in the region.

1.5 There are a range of policies and strategic interventions that have been, and are being, implemented, both locally within Orkney, across the H&I region and nationally. These have a varying level of explicit focus and degree of impact on young people in the region.

Orkney Context

Population and Impact of Geography

1.6 Census data from 2011 highlights the 'deficit' of young people that exists across the H&I. In 2011, there were 3,487 young people aged 15-29 recorded as living in Orkney, 16% of the total Orkney Islands population, lower than the 20% across Scotland, but the same proportion as the H&I area overall. Between 2010 and 2012, Orkney had a lower level of net out-migration than the rest of the H&I for people aged 15-29 years, but even so, its young population is expected to decrease 19% by 2037. Despite this prediction, over the period 2001 to 2011 the population of young people in Orkney aged 15-29 grew by 20%, double that of the regional average growth rate (10%).¹

¹ Highlands and Islands Enterprise (2014) *Young People in the Highlands and Islands: Socio-economic Profile*. May 2014, p.18

1.7 Orkney covers a large geographic area of approximately 990 km² and, with a total population of 21,600 at the time of the 2011 Census², has a very low population density of approximately 22 inhabitants per km². The largest population centre is Kirkwall, which is also the administrative centre. Orkney is distinct from the rest of the H&I in that the economy has traditionally been agriculture-driven, owing to its fertile land. Increasingly, the economy is diversifying into key growth sectors.

1.8 Orkney are an archipelago distinguished by their cultural vitality, strong sense of identity, and their hospitability³. Access between Orkney's islands, the rest of the H&I, and to the rest of Scotland including the Central Belt, is achieved through air and ferry transport services from Orkney's main island. Though it is a mere sixteen kilometres from the Scottish mainland, Orkney's peripheral location gives rise to a number of infrastructure and connectivity issues such as transport costs, fuel dependency and broadband and grid connections⁴. These have a bearing on potential growth opportunities, at least to some extent.

Key policies and strategies

1.9 Aside from public administration, education and health, employment in Orkney covers a number of growth sectors, supported by HIE's long-term strategy and current Operating Plan priorities. These include its traditional agriculture and fishing sectors and food processing (Food and drink), Energy (including renewable), Sustainable tourism, and Creative industries, as well as manufacturing, all of which are seen as important to pursuing the regional goal of economic diversification, ownership and sustainability.

1.10 The Orkney Economic Strategy for 2012-2016⁵, developed by Orkney Islands Council, is anchored around the following strategic priorities: (1) *Growing Orkney's Businesses* (2) *Connections and Global Markets* (3) *Developing Innovation, Skills and Learning* (4) *Community Development, Leadership and Entrepreneurship* (5) *Towards a Low-Carbon Economy*⁶. The policy statement's objectives were in line with the national Strategic Priorities from the Scottish Government Economic Strategy of 2011, namely: a supportive business environment; transition to a low carbon economy; learning skills and well-being; infrastructure development and place; effective government; and equity. Most of these priorities are being taken forward in the new Scottish Economic Strategy 2015, where they have been consolidated into four streamlined categories: investment, innovation, inclusive growth, and internationalisation.⁷

1.11 The Orkney Economic Strategy 2012-2016 recognises the importance of maintaining the area's brand identity and marketability, and the need to improve its tourism and renewable energy industries, as well as its overall competitiveness and global market connections.

1.12 The Community Planning Partnership's Single Outcome Agreement (SOA) is the framework that Orkney has adopted to assess the outcomes of its Economic Development Policy Statement for 2012-2016.⁸ While there is no explicit mention of SOA outcomes of

² <http://www.nomisweb.co.uk/reports/lmp/la/1946157427/printable.aspx>

³ Highlands and Islands Enterprise, *Stories & Fables: Reflections on culture development in Orkney*

⁴ Orkney Islands Council, *Economic Strategy 2012-2016*, p.7

http://www.orkneycommunities.co.uk/COMMUNITYPLANNING/documents/MINUTES/Task%20force/Orkney%20Economic%20Strategy%202012-16%20no%20action%20plan_.pdf

⁵ Orkney Islands Council, *Economic Strategy 2012-2016*.

⁶ Orkney Islands Council, *Economic Strategy 2012-2016*, page 5

⁷ The Scottish Government (2015) *Scotland's Economic Strategy*, p.36.

<http://www.gov.scot/Resource/0047/00472389.pdf>

⁸ Orkney Islands Council, *Economic Strategy 2012-2016*, p. 20

particular relevance to young people, the promise to make public services more effective has the potential to make an important difference.⁹

1.13 At a regional level, the Highlands and Islands Regional Skills Investment Plan¹⁰ (RSIP), developed by Skills Development Scotland (SDS), identifies skills challenges. It cites the greatest challenge for the H&I as the retention and attraction of working age people. Out-migration is also identified as a major skills challenge, with net out-migration evident for all ages from 15-39. The plan identifies growth opportunities for the region, including Energy and the Creative industries.

Key Investments

1.14 HIE, Orkney Islands Council, and other partners are responding to the opportunities and challenges in Orkney through key investments. These include the European Marine Energy Centre (EMEC), designed to provide a full scale, real environment test bed for marine-based renewable energy technology. EMEC has attracted developers from throughout the world, and building capacity to service the multiple deployments in Orkney waters has resulted in £23m invested in pier developments by Orkney Islands Council and private and public investment in a range of supply chain businesses. This has contributed significantly and as demand for its services increases, so too does the centre's contribution to the local economy through jobs.¹¹

1.15 Other initiatives include a joint endeavour between jewellery designer Sheila Fleet and VisitScotland to attract tourists to Orkney,¹² and more generally, support to local small creative businesses (especially in jewellery manufacture) from the likes of Business Gateway, enabling them to increase output and do more business abroad.^{13,14} Orcadian jewellery is well-known and well-reputed; and one brand, Ortak, was seen as a valuable investment for private investors who have since bought the brand.¹⁵

1.16 Additional investments include more wide-scale infrastructure, such as the Next Generation Broadband Access (NGA) roll-out. Policy responses and investments have sought to create a more balanced and diversified economy, and to support local entrepreneurs and start-up business. Orkney benefits from the presence of two universities. The International Centre for Island Technology, Heriot Watt's Orkney outpost, primarily delivers masters courses and research based around marine renewable energy and the marine environment. The University of the Highlands and Islands (UHI) Orkney College, is the archipelago's principal institute of further and higher learning, and will continue to support local industry with research, innovation, and overall skills development in line with community, regional and national priorities.¹⁶

⁹ Orkney Islands Council, *Economic Strategy 2012-2016*, p. 6

¹⁰ SDS (2014) Highlands and Islands Skills Investment Plan

¹¹ <http://www.hie.co.uk/regional-information/area-information/orkney/projects/>

¹² http://www.visitscotland.org/media_centre/sheila_fleet_teams_up.aspx

¹³ <http://www.bgateway.com/local-offices/orkney/news/orkney-jewels-shining-bright-across-the-world>

¹⁴ <http://www.bgateway.com/local-offices/orkney/news/orkney-business-crafts-out-expansion-plans>

¹⁵ <http://www.bbc.co.uk/news/uk-scotland-scotland-business-27500838>

¹⁶ Orkney College UHI *HMI Report*, 2014. <http://www.orkney.uhi.ac.uk/about-us/pdf/orkneycollegefullrev060614.pdf>

2 Staying and Leaving

2.1 This section of the report considers whether respondents are likely to stay or leave (and whether this is out of choice or out of necessity, real or perceived), and how respondents view the choices of others.

Self-identification

2.2 Young people in Orkney are more likely to want to stay in their local area than is the case across the H&I as a whole. In all, more than half regard themselves as **committed stayers** (58%), higher than the 43% for the H&I. The proportion of **reluctant leavers** in Orkney is 10% compared to 13% across the wider region. Conversely, just over a quarter (27%) describe themselves as **committed leavers**, much lower than the 40% across the H&I.

Table 2.1

Which of the following best describes you? <i>Expressed in terms of % of total excluding potential returners, new residents and none of the above</i>	Orkney (n=211)	Highlands & Islands (n=3,607)
	%	%
Committed stayer: <i>I live in the H&I and I plan on living and working here</i>	58	43
Reluctant stayer: <i>I live in the H&I; I would prefer to leave but I don't think I will be able to</i>	6	5
Reluctant leaver: <i>I live in the H&I; I would prefer to stay but I don't think I will be able to live and work here</i>	10	13
Committed leaver: <i>I live in the H&I, but I plan to leave, and live and work elsewhere</i>	27	40

Geographic variations

2.3 Respondents from outwith Kirkwall are slightly more likely to identify themselves as committed leavers – around 31% do so, compared to 20% for those living in Kirkwall itself, although both are far lower than the regional average. Kirkwall has a slightly greater proportion of reluctant stayers than elsewhere in Orkney.

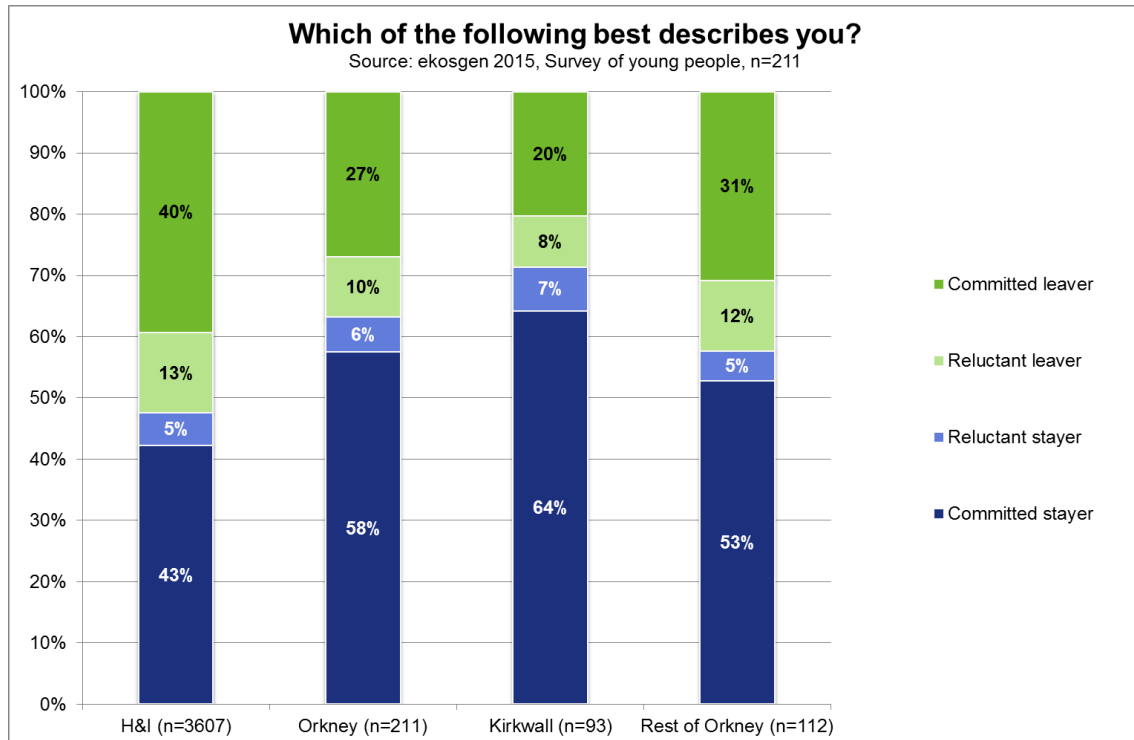
Variation by age and status

2.4 For Orkney as a whole, it is the 15-18 age group that is most likely to identify themselves as committed leavers (44%), though this is lower than for the H&I as a whole for this age group (52%). This is consistent for 15-18 year-olds living in Kirkwall (42%) and living elsewhere in Orkney (44%). By contrast, the majority of 25-30 year-olds identify themselves as committed stayers, whether living in Kirkwall (76%) or outwith (76%). Similarly, 19-24 year-olds are also much more likely to be committed stayers (68%) as opposed to committed leavers (19%).

2.5 School pupils are far more likely to want to stay in their local area in the future than is the case for school pupils across the H&I. Less than half of Orkney's school pupils are committed leavers (47%) compared to 56% across the H&I. Correspondingly, a higher proportion of school pupils identify themselves as committed stayers (34% versus 23%). For all

groups, the proportion of committed stayers is higher than the regional average, including those in employment (79% against 58% in the H&I), and those currently unemployed (67% compared to 29% in the H&I as a whole). These indicate high levels of satisfaction with Orkney.

Figure 2.1



Note: total 'n' for Kirkwall and the rest of Orkney is 205; six respondents gave no sub-area identification

Perceptions of stayers and leavers

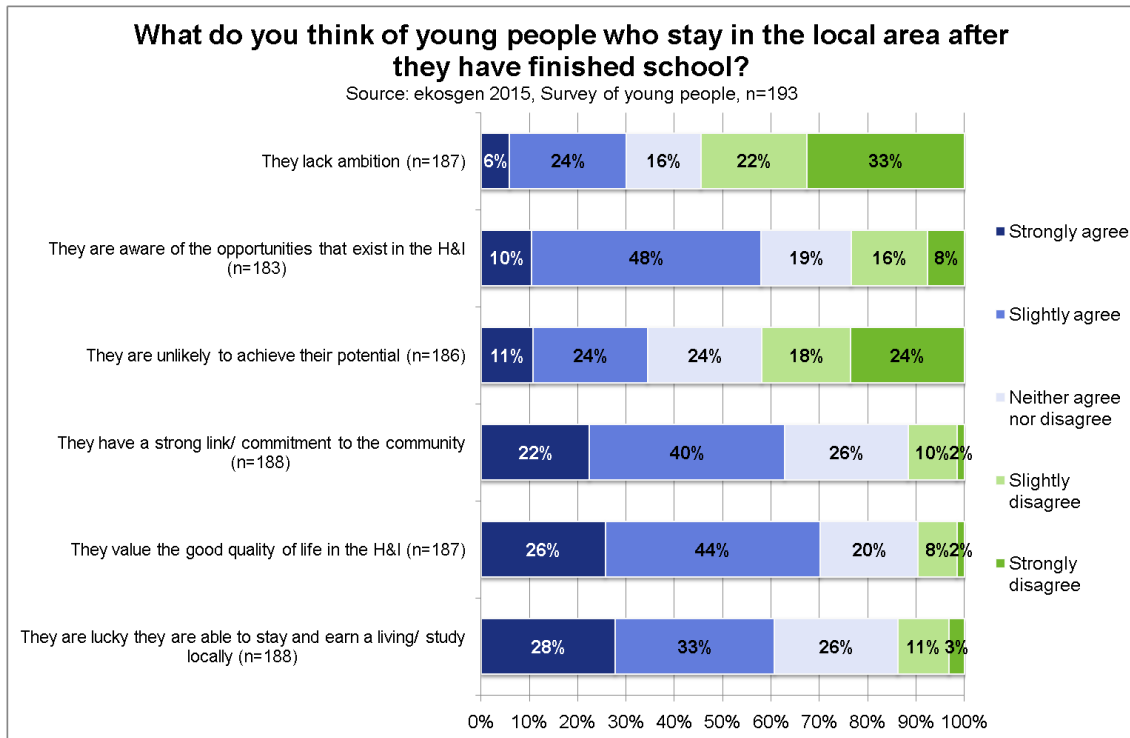
Views on those who stay

2.6 In all, some 70% of the young people surveyed in Orkney consider that those who stay in the local area following school value the good quality of life in the region. This compares to 58% across the H&I. More than three in five (62%) think that those who stay have a strong link to the community, compared to 54% in the H&I, and a similar proportion (61%) think that stayers are lucky to be able to earn a living or study locally, compared to 34% in the H&I. A marginally smaller proportion (58%) regard those who stay as 'aware of the opportunities that exist in the H&I', which is significantly above the regional average of 46%. Overall, these are indicative of a stronger positive view amongst Orkney's young people of those who choose to stay in the local area after finishing school.

2.7 These positive perceptions of others' decisions to stay are even higher in areas outwith Kirkwall. For instance, 67% consider that those who stay have a strong commitment to the community, and 72% think that they value the good quality of life.

2.8 Negative perceptions of the decision to stay are lower in Orkney than most other H&I areas. Just under a third of young people (30%) think that stayers lack ambition, compared to 34% regionally, whilst just over a third (35%) think that others limit their potential by staying (lower than the regional average of 39%). Those outwith Kirkwall have lower levels of negative perceptions.

Figure 2.2

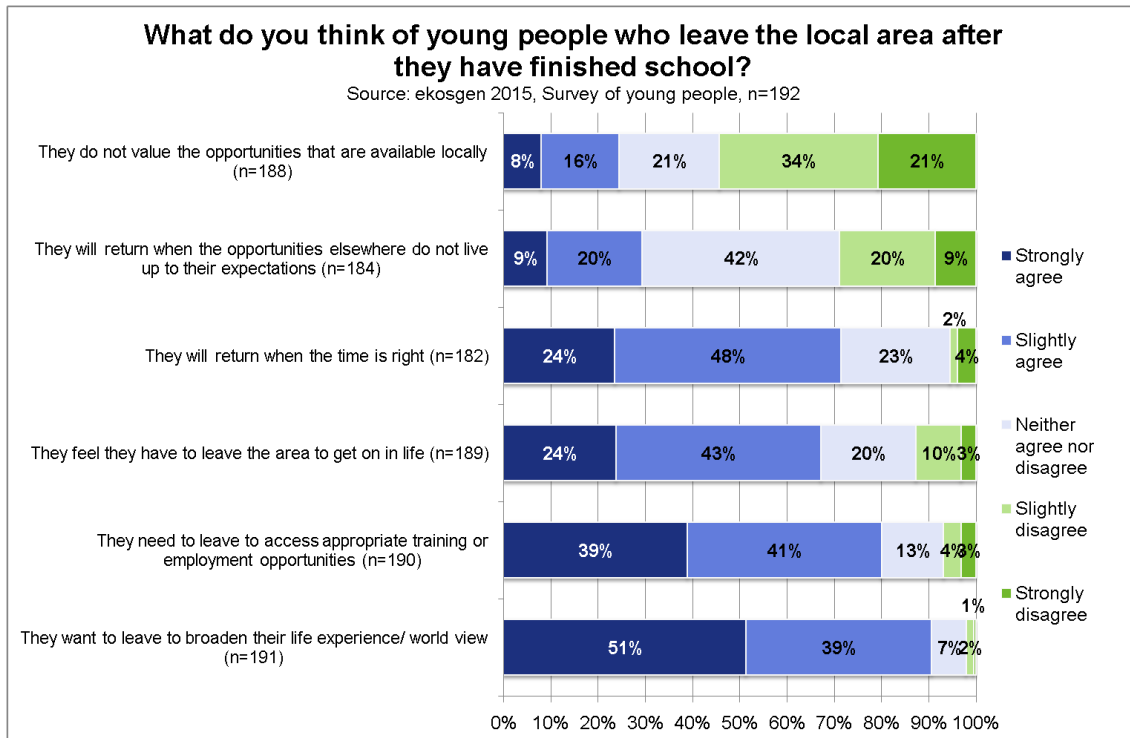


Views on those who leave

2.9 In all, 90% of young people in Orkney agree that leavers wish to do so to broaden their world view, three percentage points above the regional average (87%). Eight in 10 (80%) think that leavers do so to access appropriate training or employment opportunities, the same proportion as the H&I average. A substantial proportion (72%) feel that leavers will return when the time is right, significantly higher than the 56% across the H&I.

2.10 Fewer of those living outwith Kirkwall feel that young people leave in order to get on in life (58%), compared with those in Kirkwall (78%) and across the H&I as a whole (71%).

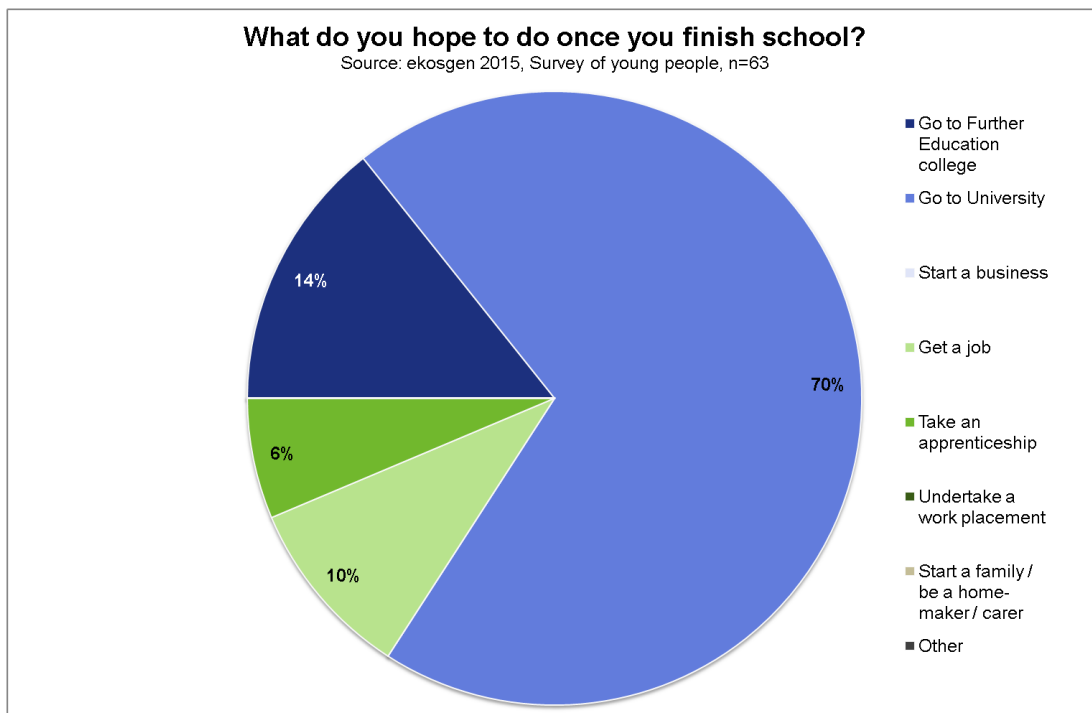
Figure 2.3



Aspirations of school leavers

2.11 The majority of school pupils in Orkney (84%) wish to go to college or university after leaving school, considerably higher than for the H&I (72%). Most wish to attend university (70%), significantly above the regional average (51%).

Figure 2.4



2.12 The majority of young Orcadians do not wish to stay in their local area after school (only 11% do so) or elsewhere in the H&I (6%). Greater proportions wish to move to Aberdeen (11%), the Central Belt (21%) or elsewhere in Scotland (29%) than is the case across the H&I (5%, 19% and 22% respectively). Interestingly, the proportion of those wishing to stay locally is the same for both those in Kirkwall and those living outwith.

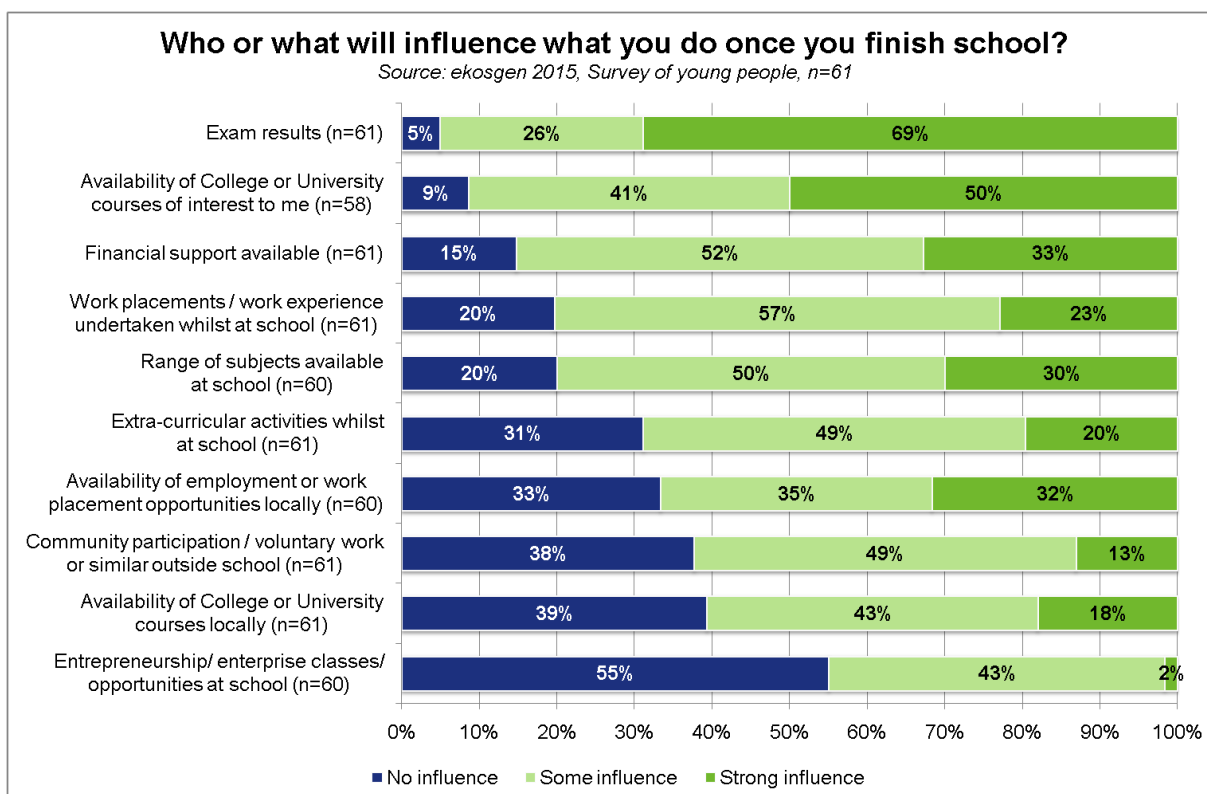
2.13 For Orkney, as opposed to Shetland where the nature of employment opportunities in the male-dominated sectors such as oil and gas makes males much more likely (47%) to want to stay locally than females (7%), there is little gender difference. The likelihood of males (9%) and females (10%) wanting to stay locally post-school in Orkney is very similar.

Factors influencing decisions after leaving school

2.14 In all, 95% of young people from Orkney stated that exam results are influential in post-school decisions, 69% strongly so, which is higher than the regional average of 62%. Most (91%) consider that interesting college or university courses have at least some influence, with 50% stating that this would be strongly influential, lower than the H&I average of 55%. For the remaining factors, these are largely in line with the rest of the H&I. Financial support has some influence for 85% of Orkney school pupils, work placements/work experience whilst at school some influence for 80%, as does the range of subjects, also 80%.

2.15 Across Orkney, fewer young people than the H&I average (20% compared with 26%) cited work placements/experience whilst at school as having *no influence* on their post-school decisions, although the proportion considering work experience to be *strongly influential* was only two percentage points lower than regionally. The availability of employment or work placement opportunities locally was of some influence for two thirds (67%), which was seven percentage points less than across the region.

Figure 2.5



2.16 For those in Kirkwall, the availability of college or university courses locally was regarded as less of an influencing factor (by 18%) than those outwith Kirkwall, where 22% thought this a strongly influencing factor. The other notable difference is in extracurricular activities, where 27% outwith Kirkwall consider this to be strongly influential compared to 6% in Kirkwall. Also, more than 83% of school pupils outwith Kirkwall considered the range of subjects available at school as having at least some influence, compared to 71% in Kirkwall itself.

3 Learning in Orkney

3.1 This chapter explores attitudes and aspirations evident in Orkney in relation to learning, covering Further Education (FE) and Higher Education (HE), and related matters such as graduate placements and the opportunities presented in terms of routes into employment from FE and HE.

Further and higher education provision

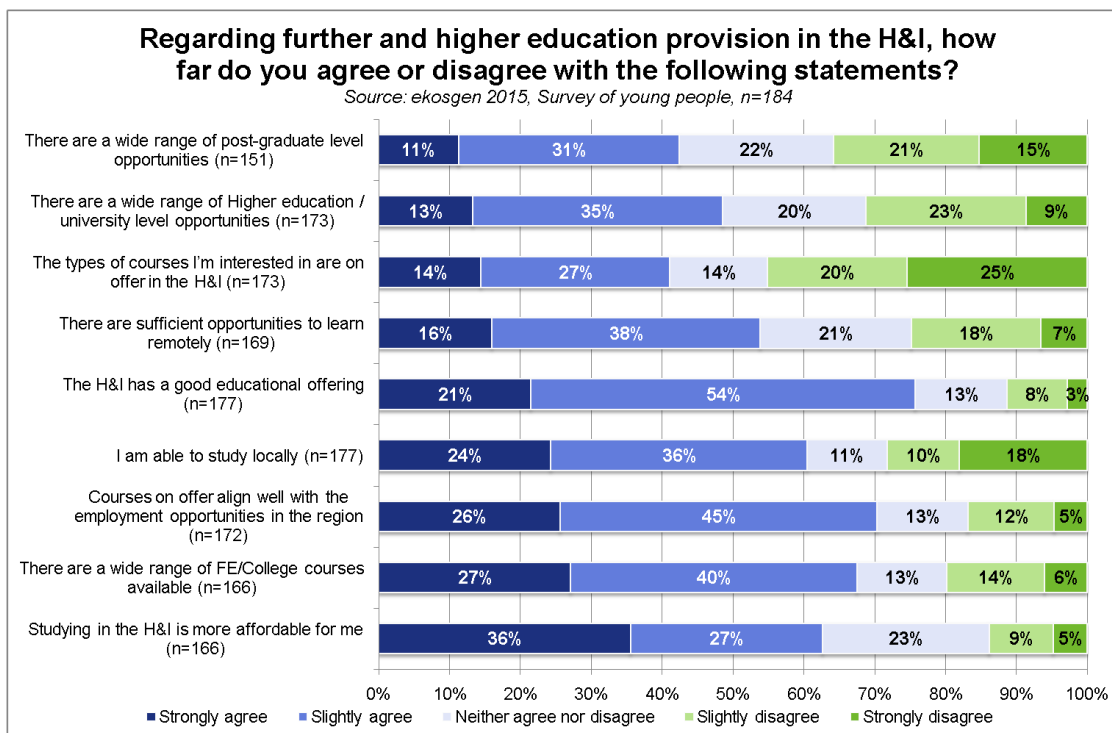
3.2 Young people in Orkney consider there to be a good educational offering in the H&I. In all, 75% think so, far higher than the regional average of 56%, with a higher proportion than average also strongly agreeing this is the case (21% as opposed to 17% in the H&I). There is particularly good feedback on the range of FE / college courses available (cited as good by 67%, higher than the 54% regionally), and 60% feel they are able to study locally, compared to 57% across the H&I.

3.3 HE in the H&I region is also viewed favourably, with slightly more young people agreeing that there is a good range of HE opportunities (48%, compared with 45% across the H&I). In addition, cost is slightly less of a factor for young people in Orkney, 63% of whom consider studying in the H&I to be affordable compared to 61% across the region.

3.4 Some 71% think that the educational offer is well aligned to employment opportunities, almost twenty percentage points higher than the H&I average of 53%. A similar proportion as regionally consider there to be courses of interest on offer (41% compared with 40%).

3.5 Whilst just under a third *disagree* that there is a wide range of HE level opportunities (31%), this rises to more than four in 10 (44%) for those in Kirkwall. Almost half of those in Kirkwall (46%) also disagree that what is on offer is interesting to them (42% for the H&I). Outwith Kirkwall, the proportion disagreeing that there is a wide range of HE level opportunities is only 20%.

Figure 3.1



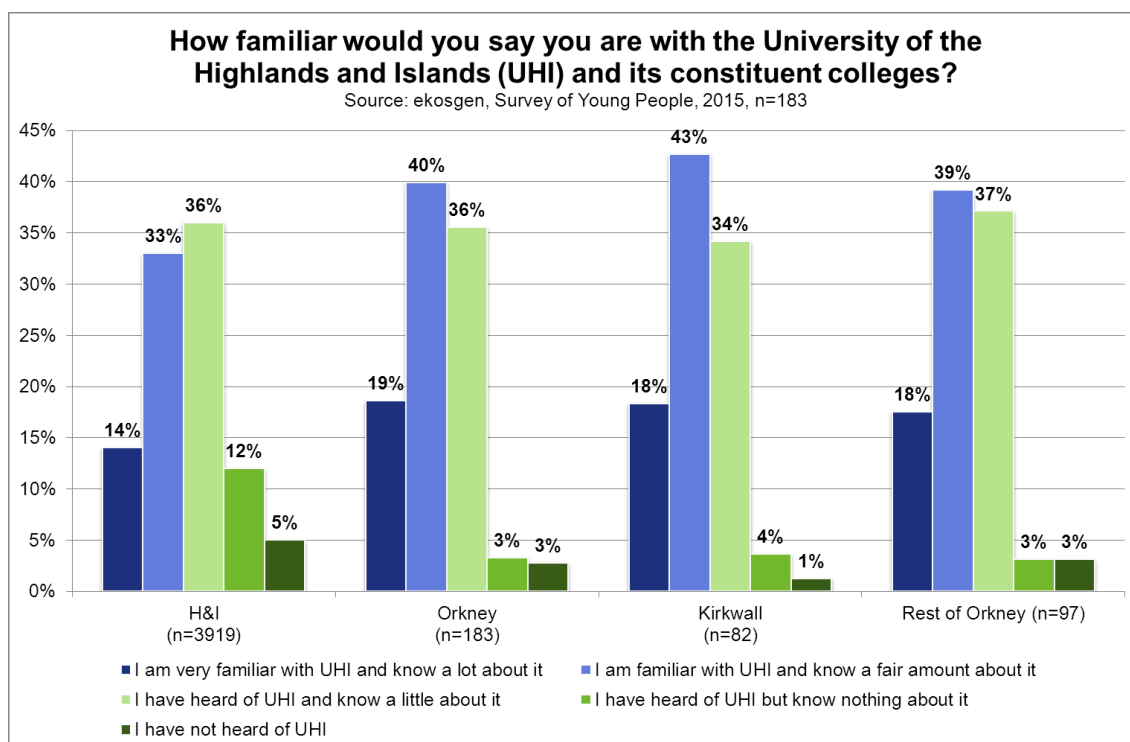
3.6 Young people aged 19-24 are more likely to *strongly* agree with the assertion on the educational offering (25%, compared to 23% of those aged 15-18 and 15% aged 25-30). This same 19-24 age group (72%), as well as those that are currently students (81%), are more likely to agree that the range of courses available is good, particularly for FE courses. Additionally more than half (52%) of students agree that they are able to study locally and 69% agree that it is affordable. Some eight in 10 students agree that courses align well with regional employment opportunities.

3.7 Slightly fewer young people outwith Kirkwall (60%) feel able to study locally, compared with those in Kirkwall (64%), yet both are above the regional average of 57%. However, greater proportions of Orkney's young people (54%) feel they are able to learn remotely than the H&I average (49%); 58% in Kirkwall and 53% living elsewhere in Orkney.

Awareness of UHI and its offer

3.8 A high proportion of young people in Orkney (97%) have heard of UHI, compared to 94% across the H&I, and some 94% have good awareness, or know at least a little about UHI, compared to 82% regionally. Around one in five say they know *a lot* about UHI, higher than 14% regionally, and six in 10 know at least a fair amount. Awareness is strongest amongst those in Kirkwall where 61% know at least a fair amount about UHI, four percentage points higher than for those living outwith Kirkwall.

Figure 3.2



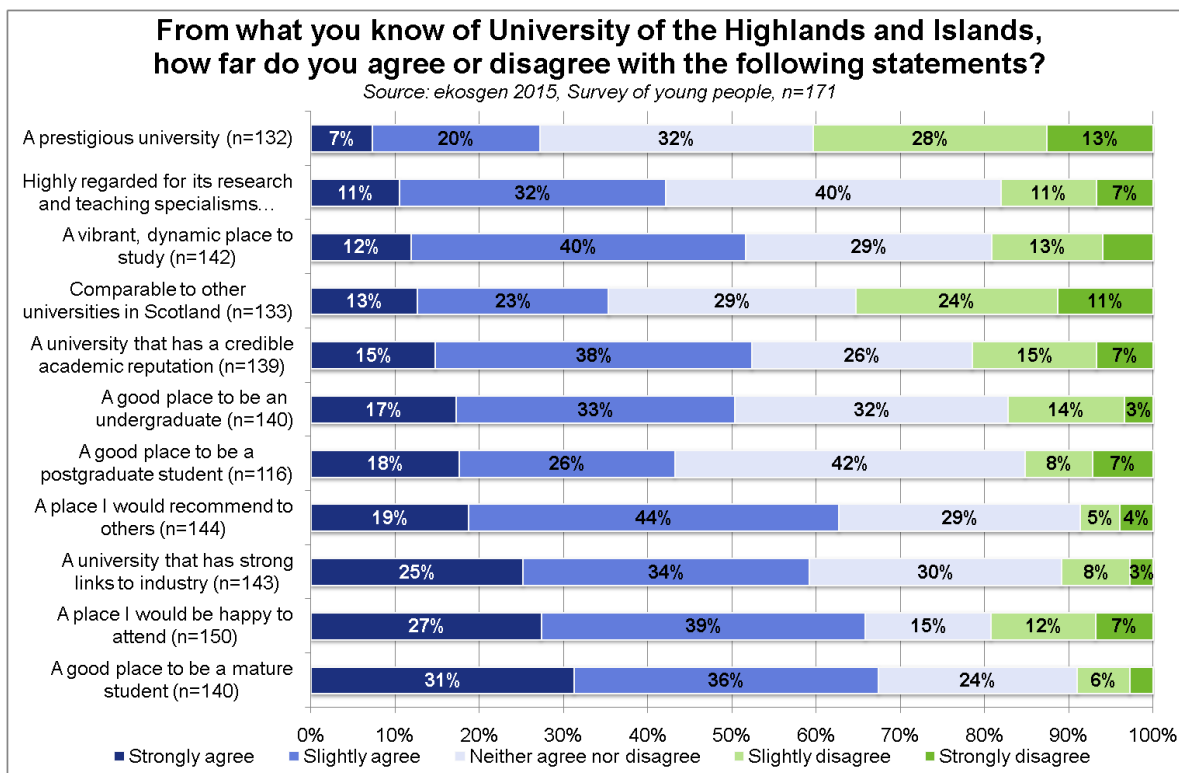
3.9 UHI is seen as a good place to be a mature student: 67% of respondents think this is the case, higher than the regional average of 64%, and in Kirkwall this rises to 80%. Around half see UHI as a good place to be an undergraduate student, slightly higher than across the H&I overall (48%). Fewer young people in Orkney rate its suitability for postgraduate study, just over four in 10, on a par with the regional average.

3.10 Almost two thirds of *students* (61%) agree that UHI is good for undergraduate study, higher than the regional average of 53%, whereas only about two-fifths (44%) of school pupils think so (and none strongly agree), lower than the regional average of 48%.

3.11 More young people in Orkney (53%) think UHI has a credible academic reputation than the regional average (42%). This is slightly lower in Kirkwall, where 49% think so, although this is still more than the regional average. UHI is considered to have strong links to industry, both in Kirkwall (where only 12% disagree) and outwith Kirkwall (10%); regionally 15% disagree.

3.12 Some two thirds (66%) of young people in Orkney would be happy to attend UHI, compared to 57% across the H&I. For students this rises to 68%, and for 25-30 year-olds to 78%. More than seven in 10 (71%) of those in Kirkwall would be happy to attend UHI.

Figure 3.3

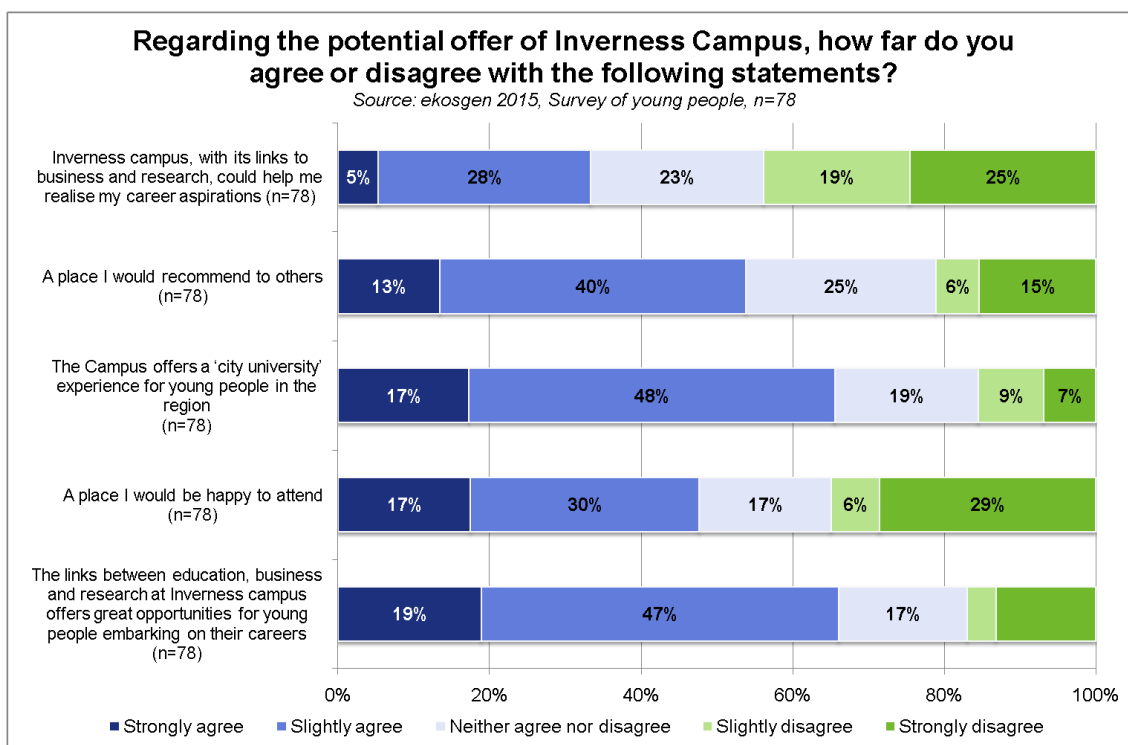


Inverness Campus

3.13 Inverness Campus, which will see Inverness College UHI co-located with centres for business and research, opened in May 2015. Whilst 31% of young people in Orkney are aware of the Inverness Campus, 69% are not. This contrasts with the situation across the H&I overall, where nearly twice as many (58%) know something of the Campus, although it is worth noting that across the region this awareness rises significantly the closer the young person lives to Inverness.

3.14 This relatively weak knowledge of Inverness Campus is reflected in views on the Campus. Whilst 65% think it offers a city university experience for the region, only a third think it would help career aspirations (compared to 60% and 46% across the region). Further, almost half (47%) only slightly agree that links between education, business and research at Inverness Campus offers great opportunities for young people embarking on careers.

Figure 3.4

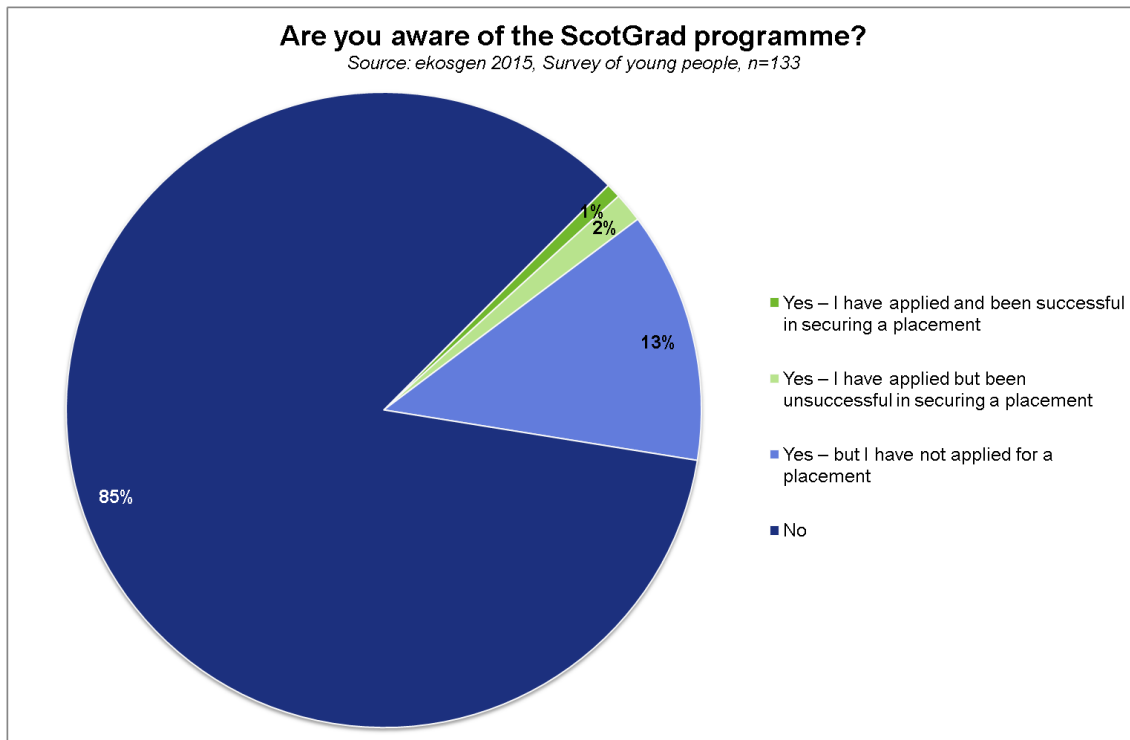


Graduate placements

3.15 Whilst more than half (52%) consider that undertaking a graduate placement would improve their chances of securing employment in the region, fewer consider that there are a wide range of placement opportunities (30%), and that there are sufficient placement opportunities in the more rural areas (24%). These are similar proportions to regionally (53%, 31%, and 27%). However, it is worth noting that close to 30% of respondents in Orkney did not know whether there were sufficient opportunities available, rurally or elsewhere.

3.16 Awareness of the ScotGrad programme is also lower in Orkney than across the H&I. The ScotGrad programme provides graduate and summer placements, and is designed to support business innovation, knowledge transfer and growth in the H&I by assisting graduates with their career progression. It also aims to encourage young people to stay in the H&I, and overcome market failures around graduate recruitment and innovation, which tend to be particularly severe in remote rural areas. In all, 85% of respondents in Orkney are unaware of the ScotGrad programme, higher than the 79% who are not aware across the H&I.

Figure 3.5



4 Working in Orkney

4.1 This section identifies what young people in Orkney think about local employment and career progression opportunities, their ideal location to work, familiarity with and interest in H&I growth sectors, and characteristics valued most in employers. Again it seeks to draw out sub-area variations where these exist.

Employment-Related Factors in the Local Area

Opportunities for Apprenticeships

4.2 Of all the employment-related factors, opportunities for local apprenticeships are viewed most positively by young people in Orkney, and just over 60% regard the opportunities as quite good (37%) or very good (25%), compared to 49% across the H&I. Opportunities are viewed most positively amongst those living outwith Kirkwall (70% rate as quite or very good), compared with 55% in Kirkwall, although this is still six percentage points higher than the H&I overall. School pupils and those aged 15-18 are the most positive, with 69% in both groups rating apprenticeship opportunities as quite or very good, indicating positive views amongst one of the key target groups for apprenticeships.

Self-Employment Opportunities

4.3 Self-employment opportunities locally are also rated positively, with over half rating them as quite or very good, 14 percentage points higher than the 39% across the H&I overall. Those living outwith Kirkwall are again more positive still, with 62% thinking there are good opportunities, compared to 46% amongst those in Kirkwall.

Local Employment Opportunities

4.4 Over half of young people in Orkney (51%) view local employment opportunities as quite (40%) or very good (11%), significantly higher (16 percentage points) than the H&I average of 35%. This is especially true for those living outwith Kirkwall (58%), whilst those in Kirkwall are slightly less optimistic (45%) although this remains well above the regional average. Young people aged 19-24 years are the most positive (58%), compared to 48% of 15-18 year olds and 47% of those aged 25-30 years. University/ college students (62%), are also very positive about local employment opportunities, followed by those in employment/ self-employment (52%), while school pupils are less optimistic (47%).

Opportunities for Personal Development

4.5 Opportunities for personal development locally are viewed slightly less favourably. In all, just under half (47%) of young people in Orkney rate opportunities for personal development locally as quite (34%) or very good (13%). However, this is again well above the 37% across the H&I as a whole. Young people outwith Kirkwall are more positive (54%) compared to those in Kirkwall (41%).

Pay Levels

4.6 In all, 39% of young people in Orkney rate pay levels positively, with 35% viewing these as quite good and 4% as very good, 12 percentage points higher than the proportion across the H&I overall (27%). This is markedly higher amongst those outwith Kirkwall (51%) than in Kirkwall itself (27%), where it is in line with the H&I average of 27%. Perspectives on pay levels become less positive with age; 47% of those aged 15-18 perceive these as good, compared to 40% of 19-24 year olds and 28% of those aged 25-30 years.

Diversity of Employment Opportunities

4.7 Despite being positive about the overall level of employment opportunities in the local area, young people in Orkney are far less optimistic about the *diversity* of local employment opportunities. Of all the employment-related factors, local diversity of employment is viewed the second least positively, with 38% perceiving this as quite or very good, although this remains quite a bit higher than the 29% regionally. Those in Kirkwall perceive local employment diversity to be a greater issue, with 28% rating this positively and 41% poorly, compared to elsewhere in Orkney where the figures are 48% positive and 24% poor.

4.8 University/ college students and school pupils in Orkney are more positive about the diversity of employment opportunities (47% and 41%), while those in employment/ self-employment are least positive, with 35% rating these opportunities as good.

Opportunities for Career Progression Locally

4.9 Opportunities for career progression are rated the least positively of all the employment-related factors, with just 29% rating these as good; the only factor rated equally to the H&I overall. Opportunities are viewed slightly more positively amongst those living outwith Kirkwall (31%), compared to those in Kirkwall (28%).

4.10 Optimism reduces with age, with 41% of 15-18 year olds rating career progression opportunities favourably, compared to 29% amongst 19-24 year olds and just 14% for 25-30 year olds. Similarly, whilst 40% of school pupils rate career progression opportunities as quite or very good, this compares to 31% of university/ college students and 23% of those in employment/ self-employment. Overall, only 5% regard local career progression opportunities as very good.

Perception of Opportunities across the H&I

4.11 As with other parts of the H&I, there are perceived to be more opportunities across the region than is the case locally. For example, 58% of Orkney's young people perceive there to be good career progression opportunities within the region, compared to locally (29%). Almost three quarters (72%) think there are good apprenticeship opportunities across the H&I, compared to 62% that think there are good opportunities locally. Further, almost two thirds think there are good employment opportunities generally within the region, compared to the 51% that think this is the case locally.

Figure 4.1

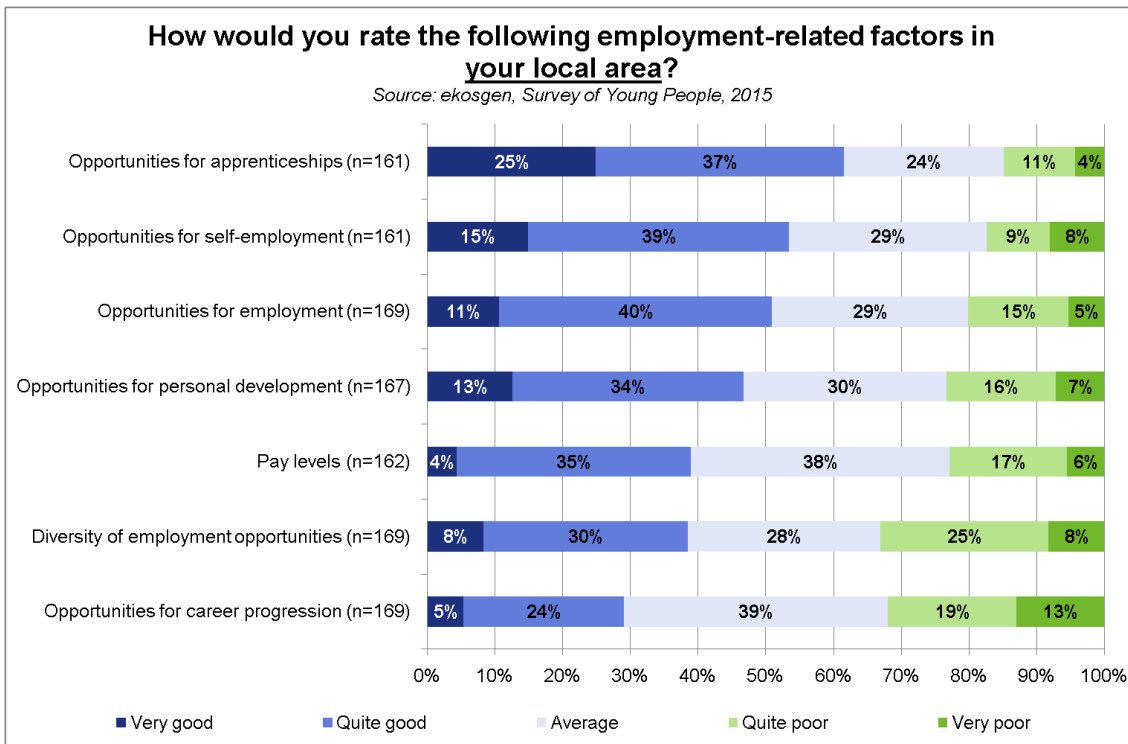
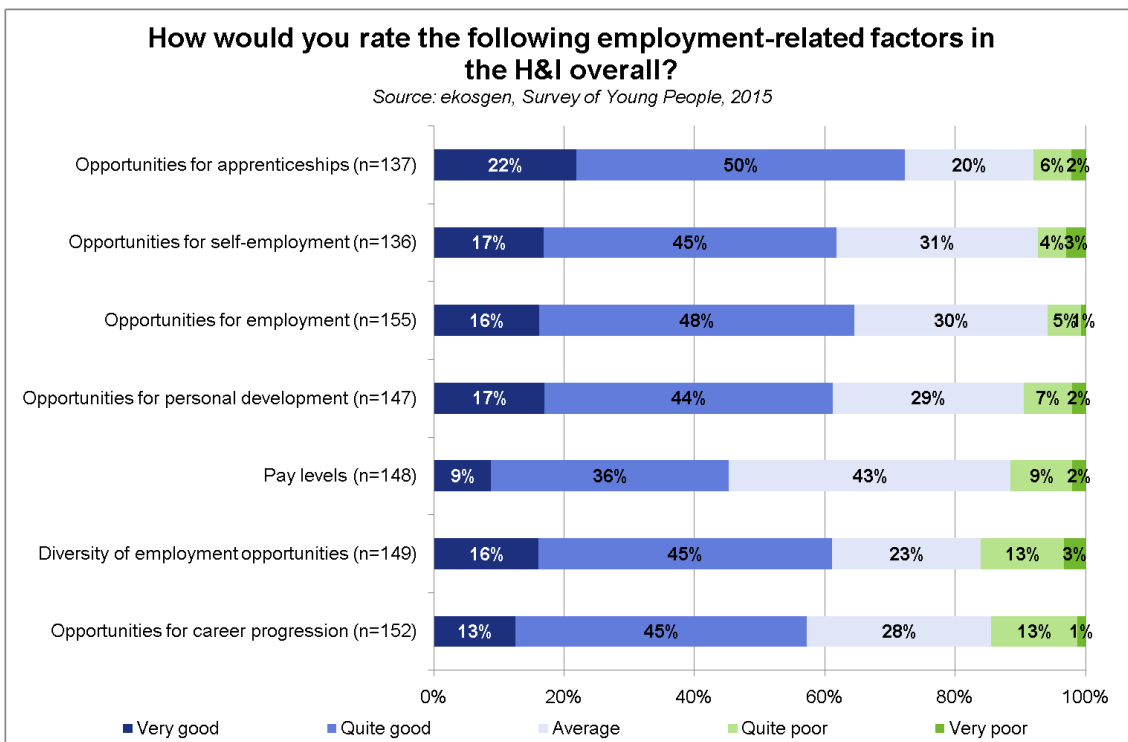


Figure 4.2



4.12 Over half of Orkney's young people would like to work in the H&I, 11 percentage points higher than the H&I average of 44%. Further, almost half (48%) wish to work locally, compared to 29% regionally.

4.13 In all, just over a fifth (21%) would like to work in Scotland but outside the H&I (7% in the Central Belt, 4% in Aberdeen and 10% elsewhere in Scotland). Just 5% would like to work elsewhere in the UK (slightly lower than the H&I average) and 15% would like to work elsewhere in the world (compared to 20% across the wider survey sample).

4.14 Table 4.1 shows where young people would ideally like to work by sub-area. Those in Kirkwall have a slightly stronger connection to their local area, with 53% ideally wanting to work locally, compared to 46% outwith Kirkwall. A fifth of those from Kirkwall would like to work somewhere in Scotland, but outside the H&I, compared with almost a quarter (23%) from elsewhere in Orkney.

Table 4.1: Desired Place to Work by Sub-Area

	Orkney (n=170)	Kirkwall (n=75)	Outwith Kirkwall (n=91)
Local area*	48%	53%	46%
Somewhere in the H&I	6%	7%	5%
Central Belt	7%	7%	8%
Aberdeen	4%	5%	3%
Elsewhere in Scotland	10%	8%	12%
Elsewhere in the UK	5%	4%	7%
Elsewhere in the world	15%	15%	14%
Other	4%	1%	4%

Source: *ekosgen, Survey of Young People, 2015*; * current home town/village

Please note, percentages may not sum due to rounding.

4.15 The proportion wanting to work in their home town or somewhere else in the H&I generally increases with age/life stage. Across Orkney, 63% of 25-30 year olds wish to work locally, and 12% somewhere in the H&I; for 19-24 year olds, this is 55% and 2% respectively; and for 15-18 year olds, it is 31% and 6%. Across all age groupings, the proportion wishing to work elsewhere in the H&I is lower than the regional average of 15%, largely indicative of a strong commitment to Orkney.

4.16 Those in employment or self-employment are most likely to want to work locally (66%) or elsewhere in the H&I (6%), probably reflecting existing and conscious commitment to doing so. School pupils are the least likely to want to work locally (31%) or elsewhere in the H&I (7%), whilst they are most likely to want to work elsewhere in the world (19%). This is typical of the age group and not confined to young people in Orkney. University/ college students are most likely to want to work elsewhere in the UK (17%) compared to the other groups, suggesting that students may be looking to move away, either temporarily or permanently, following the completion of their education. This mirrors the pattern across H&I responses, although a slightly higher proportion of all status groupings in Orkney wish to work locally.

4.17 Table 4.2 (overleaf) compares the percentage of those wishing to work locally alongside the proportion thinking there is good *diversity* of local employment opportunities to give an indication of perceived supply of diverse jobs versus demand. There is a 10 percentage point difference between the proportion of young people in Orkney wanting to work locally compared to those considering there to be a good range of diverse opportunities.

4.18 The difference is quite pronounced in Kirkwall, with a 25% differential between those wishing to work locally (53%) and those rating the diversity of employment opportunities positively (28%). By contrast, there is little difference between demand and availability for those outwith Kirkwall. Comparing good employment opportunities overall, there is a +3% differential, with 51% positively rating local opportunities against the 48% wishing to work locally. This

suggests that while young people can work locally if they wish, the diversity of local opportunities is not as widespread, which may mean some compromise in terms of employment choice (and progression).

Table 4.2

Orkney sub-area	Those ideally liking to work in their local area	Those rating diversity of employment opp's as quite or very good	Percentage point (pp) difference
Kirkwall	53%	28%	-25
Outwith Kirkwall	46%	48%	+2
<i>Overall Orkney Islands average</i>	<i>48%</i>	<i>38%</i>	<i>-10</i>

Source: ekosgen, Survey of Young People, 2015.

Views on H&I Growth Sectors

4.19 HIE's Operating Plan recognises that the region's natural assets, ambition, skills base and cultural background provide a range of opportunities to develop a vibrant sectoral economy.¹⁷ HIE's growth sectors - *Financial and Business Services; Creative Industries (including digital); Sustainable Tourism (including hospitality); Food and Drink; Life Sciences; and Energy (including renewable energy)* are aligned to the key sectors identified in Scotland's Economic Strategy, but with key regional specialisms under each sector.

4.20 The most well-known sector in Orkney amongst young people is Food and drink (73%), followed by Sustainable tourism, which includes hospitality (69%), and Energy (57%) compared to 62%, 60% and 45% regionally. Awareness of growth sectors is higher in Orkney than in the rest of the H&I for all sectors apart from Life Sciences (23% compared to 29%). In the case of Energy and Food and drink, this is highly likely due to the strong presence of these sectors locally.

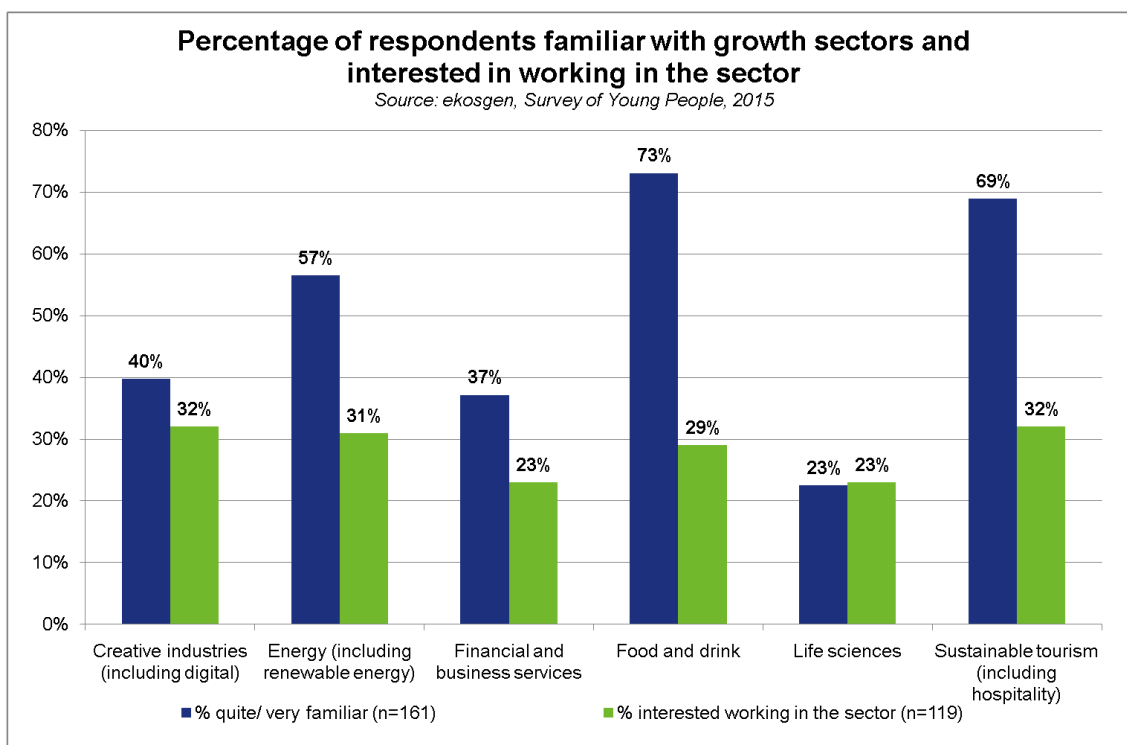
4.21 Creative Industries, Sustainable Tourism (including hospitality) and Energy are the most *desirable* sectors for young people in Orkney, with nearly a third expressing interest in working in these sectors. Around 29% are interested in working in Food and drink and just under a quarter in Financial and business services or Life sciences (23%). The slightly lower proportions interested in Financial and business services and Life sciences may be because these sectors have a limited presence locally.

4.22 Those living outwith Kirkwall are more interested in working in Energy (37% versus 25% in Kirkwall) and in Creative industries (32% versus 27%), whilst those in Kirkwall are more interested in working in Food and drink (35% versus 25% outwith Kirkwall) and Life sciences (27% versus 19%).

4.23 Figure 4.4 compares levels of awareness of growth sectors amongst young people in Orkney with interest in working in the sector. The greatest disparities are in Food and Drink, where 73% are familiar but where interest is 29%, Sustainable Tourism (69% familiarity and 32% interest) and Energy (57% familiarity and 31% interest).

¹⁷ HIE (2014) Building Our Future: Operating Plan 2014-2017

Figure 4.4



Desired Qualities in Employers

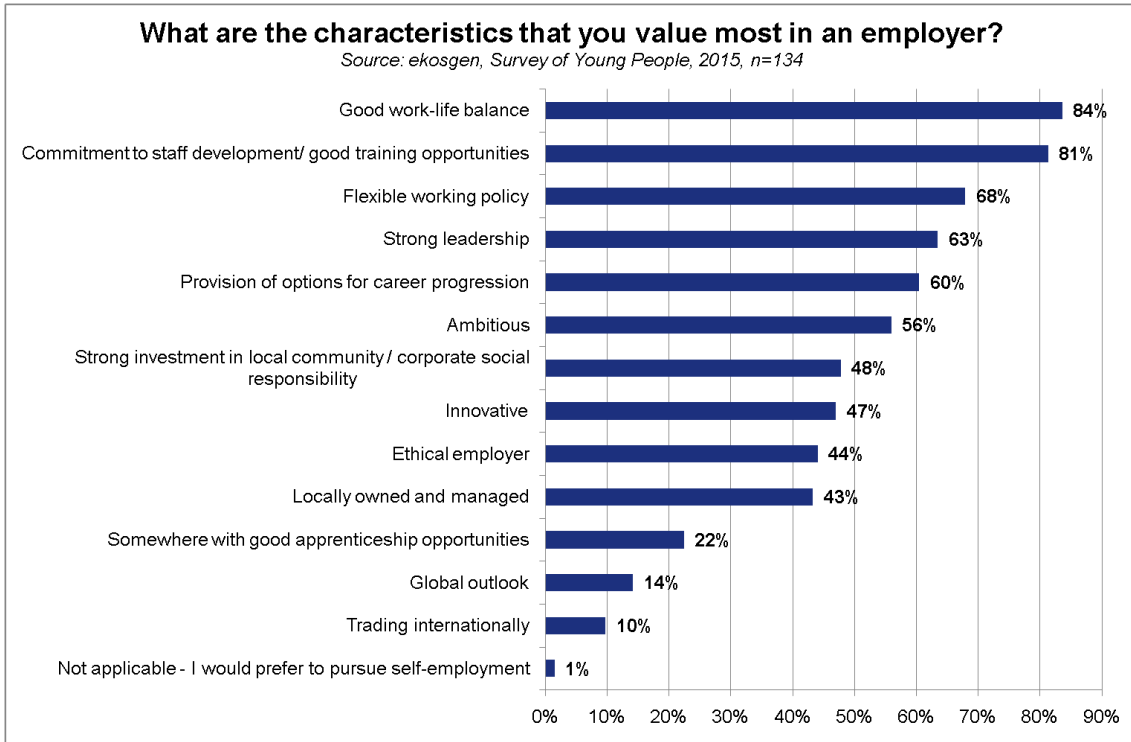
4.24 The most highly valued quality in employers amongst Orkney's young people is a work-life balance (84%) and this is higher than the 74% across the H&I. A commitment to staff development and training is rated as important by 81%, in comparison to 76% across the H&I. Flexible working policies are also important (ranked 3rd), where 68% value this, again higher than the 56% regionally. In all, 63% value strong leadership (the fourth highest factor) compared to 57% regionally, 60% value the provision of options for career progression, slightly above the H&I overall (58%), 56% an ambitious nature (similar to the regional average) and 47% an innovative employer, compared to 42% for the H&I.

4.25 More ethical business practices are relatively highly valued by young people in Orkney, with 48% valuing a strong investment in the local community/ corporate social responsibility (compared to 44% regionally), 44% an ethical employer (equal to the regional average) while 43% want to work with a locally owned and managed business (markedly higher than the regional average of 27%).

4.26 Young people in Orkney are less interested in a global outlook from employers (14% compared to 22% regionally) and in international activities (just 10% compared to 12% regionally). This suggests that an outward-looking perspective amongst employers is not highly valued by young people in Orkney.

4.27 Respondents from Kirkwall are more likely to value the provision of options for career development than those living outwith Kirkwall (67% versus 55%), an employer who demonstrates strong leadership (67% versus 61%) and an ambitious nature (58% compared to 53%). In contrast, those living outwith Kirkwall are more likely to value a good work-life balance (86% versus 81%), a flexible working policy (70% versus 65%), a business that is locally owned and managed (48% compared to 38%) and a global outlook (20% versus 9%).

Figure 4.5



5 Life aspirations in Orkney

5.1 There are a range of other factors, beyond education and employment, which affect a young person's decision on whether to stay or leave Orkney. These include housing, transport, mobile and internet connectivity, arts, leisure and culture and the strength of the local community. Any significant variations by sub-region within Orkney are outlined in the analysis.

Housing

5.2 As the overall H&I report shows, the lack of available and affordable housing is a serious issue for young people¹⁸ and one that has risen in importance since 2009, relative to other factors. Whilst market conditions mean that housing has likely become an issue for young people more generally, housing availability and affordability are clear concerns for young people in the H&I. This is also true for young people in Orkney.

5.3 In terms of housing in the H&I, the views of Orkney's young people reflect those across the H&I. Just over 29% consider there to be an appropriate choice of housing *to buy* while 53% do not think so, compared with 26% and 57% regionally.

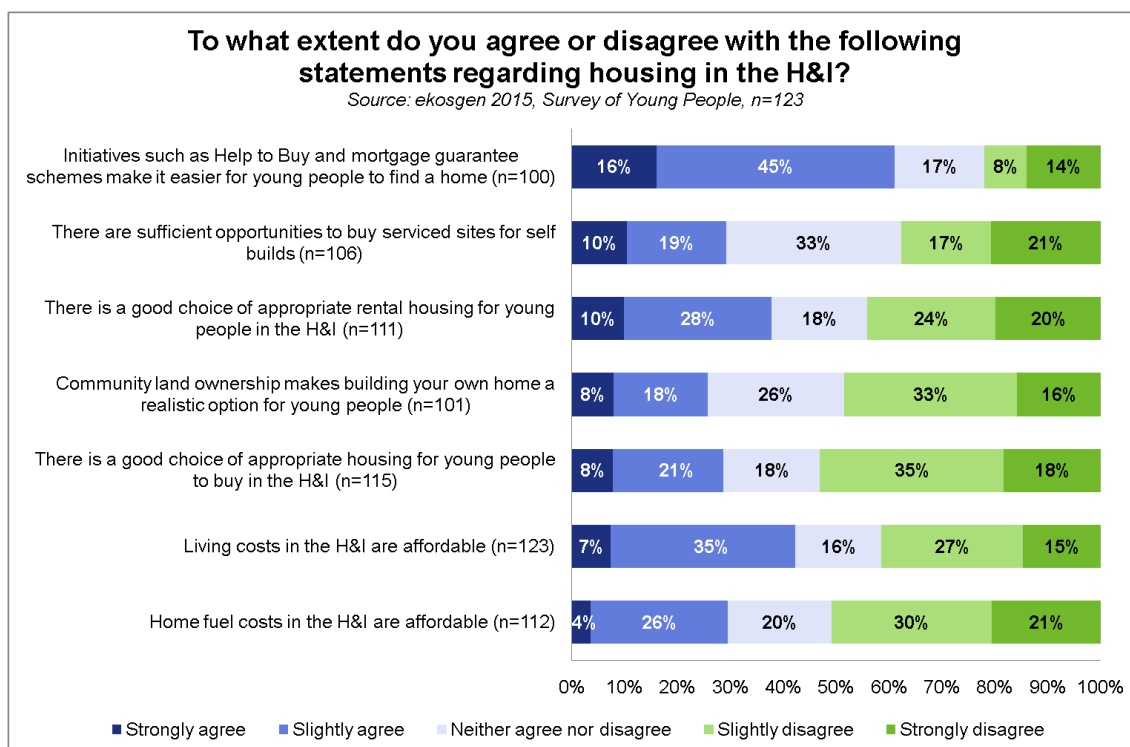
5.4 The picture is similar for appropriate *rental* housing: only 38% consider there to be a good choice (and 44% do not), although this is better than the regional picture where 29% consider there to be a good choice and 52% do not think so. Housing ranks as the fourth most important issue for young people in Orkney for making the H&I a more attractive place to live, compared to third in the region overall.

5.5 The cost of living is a serious issue for young people in Orkney, as it is generally across the H&I. Just over four in 10 (42%) believe costs are affordable, compared to 41% across the H&I. The cost of living is felt most acutely by those living outside Kirkwall, where just under one third (31%) believe living costs are affordable, compared with 52% in Kirkwall.

5.6 More than one in four young people in Orkney (26%) agree that community land ownership makes building your own home a more realistic option – a proportion slightly below the H&I (28%). Further, 29% agree that there are sufficient opportunities to buy serviced sites for self-build, and this is above the regional average of 25%.

¹⁸ The Housing questions were only asked to those respondents via the main online survey, i.e. they were not asked in the schools paper and online surveys.

Figure 5.1



Transport

5.7 Transport is a key issue for young people in Orkney, both in and outwith Kirkwall.

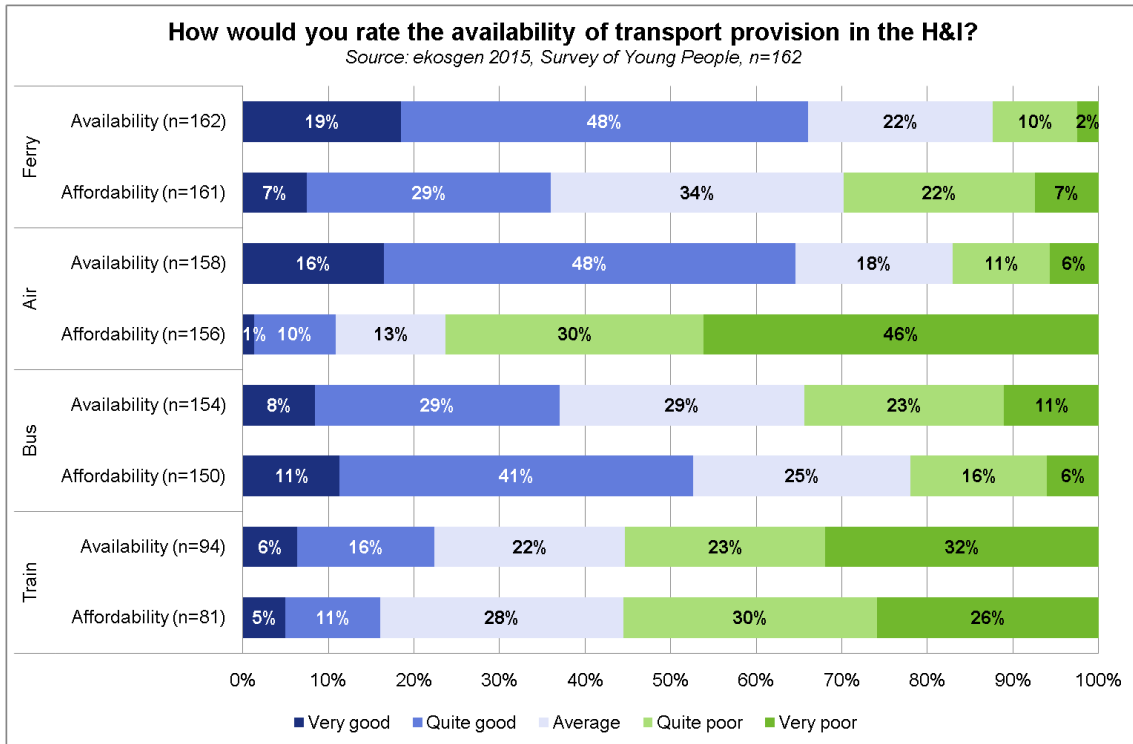
5.8 **Ferry and air travel** are the main transport modes connecting Orkney to mainland Scotland. Ferry availability is rated as good by two thirds, and air travel availability by a similar proportion. Both are rated equally by those from Kirkwall and those living outwith Kirkwall.

5.9 Both modes, however, are considered unaffordable by young people in Orkney, particularly air travel where three quarters (76%) rate it as poor. This is higher in Kirkwall than in the rest of Orkney. Some three in 10 young people also rate ferry affordability as poor, a higher proportion than young people from the Outer Hebrides (24%) where the Road Equivalent Tariff (RET) has been introduced which reduces ferry costs.

5.10 For travel *within* Orkney, buses are an important public transport mode. **Bus travel** availability is rated as at least 'quite good' by nearly four in 10 (37%), slightly below the H&I as a whole (40%). Bus travel is rated as the most *affordable* mode of transport, with just over half of young people rating it good, far higher than the average for the region (34%).

5.11 **Rail travel** availability and affordability are rated poorly by respondents as Orkney has no railway line.

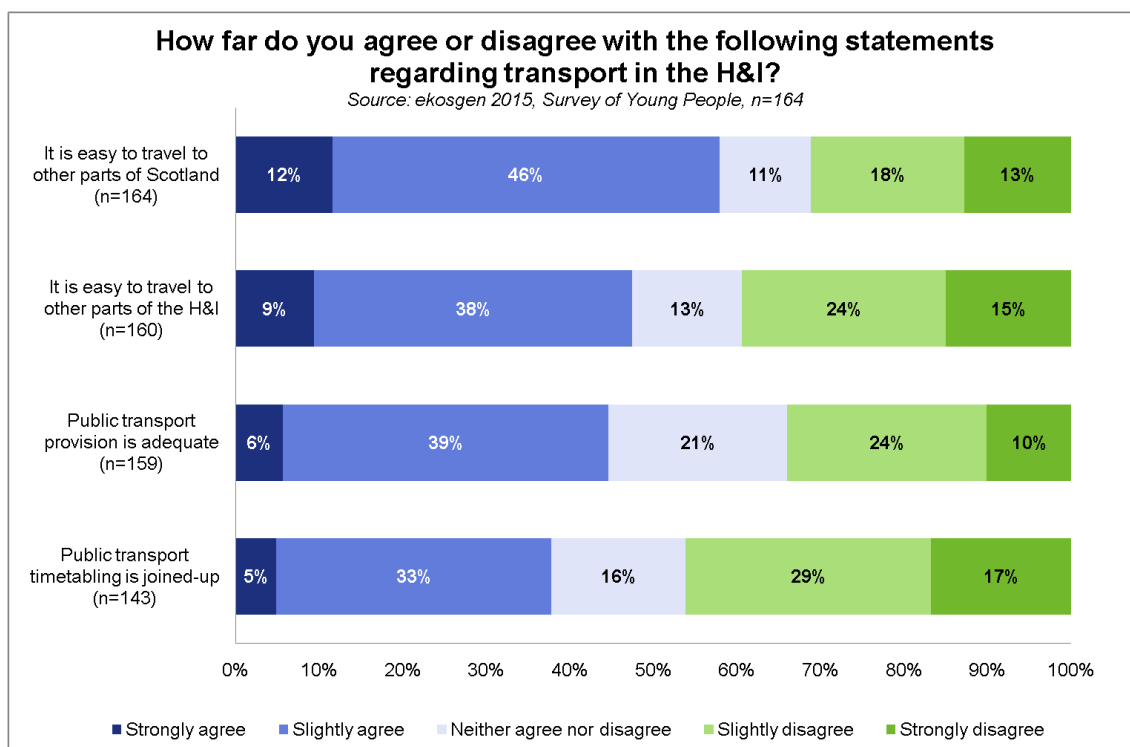
Figure 5.2



5.12 Nearly six in 10 young people agree that it is easy to travel to other parts of Scotland from Orkney (58%), and almost half agree that it is easy to travel to other parts of the H&I. These are both in line with the regional averages. Perhaps surprisingly, young people from Kirkwall perceive themselves to be more isolated from other parts of Scotland than those outwith Kirkwall.

5.13 Nearly four in 10 agree that public transport timetabling is joined-up (38%), while a larger proportion (46%) disagree, compared with 34% agreeing and 40% disagreeing in the region overall. In all, whilst less than half of respondents (45%) agree that public transport provision is adequate, this is still above the H&I average (40%).

Figure 5.3

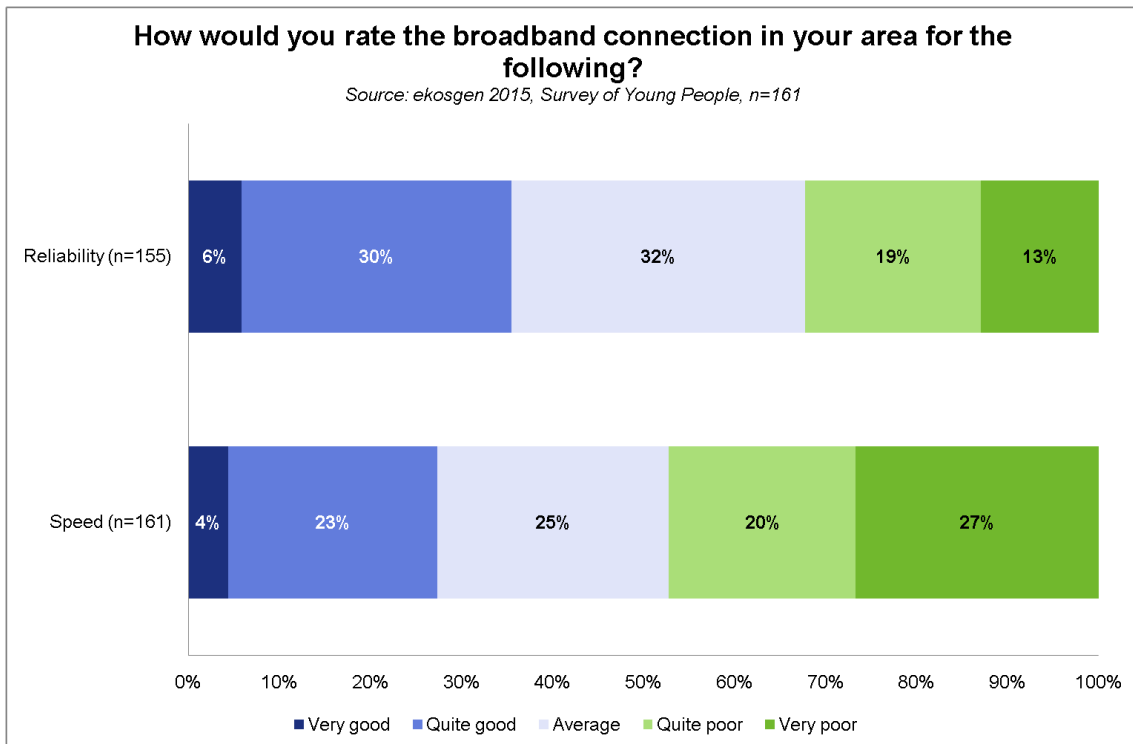


Digital Connectivity

5.14 Some 98% of young people in Orkney have access to broadband internet (standard broadband or NGA broadband), and this is slightly higher than the H&I average of 96%. The vast majority of this is standard broadband. Just 2% currently have access to NGA broadband at the time of the survey (April 2015), compared to 14% across the H&I, although this is set to change significantly in the next 12-18 months with the roll out of NGA. Orkney has the highest awareness rate of the NGA roll-out of any part of the H&I region, with two thirds (66%) of young people aware, at least to some extent, significantly above the regional average (56%).

5.15 The quality of broadband is rated poorly by young people in Orkney. As shown in Figure 5.4, broadband *reliability* is rated positively by just over a third, compared to the regional average of 43%. Similarly, broadband *speed* is rated positively by just 27% of young people, the lowest of all H&I areas (along with the Outer Hebrides and Argyll and the Islands), and almost half (47%) rate the speed negatively, significantly higher than the regional average of 37%.

Figure 5.4

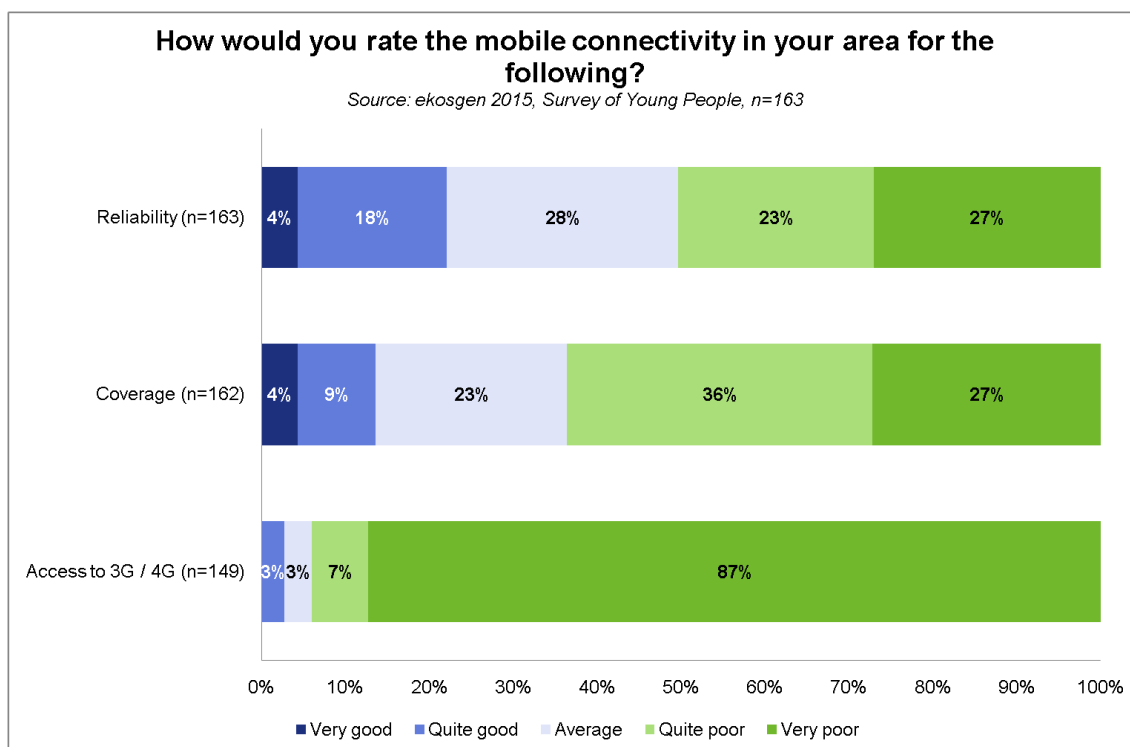


5.16 The top three key benefits of NGA broadband reported by young people in Orkney were the same as for those across the H&I, namely: 1) better music, film and entertainment streaming 2) improved communication with family and friends, and 3) better access to social media. The use of NGA to facilitate more flexible working or to allow home working/ remote working was classed as largely unimportant, suggesting that despite the desire for more flexible working and learning emerging elsewhere in this report, young people in Orkney are not thinking of the role that NGA could play in making this a reality.

5.17 Mobile connectivity in Orkney is rated more poorly than broadband connectivity, and young Orcardians are more critical of mobile connectivity than in the H&I overall. Just over one fifth (22%) of young people rate mobile *reliability* positively (compared to 35% across the H&I) and just over one in 10 rate mobile *coverage* positively, compared to 29% regionally. Mobile reliability and coverage are both rated more poorly by those in Kirkwall.

5.18 Most notably, almost nine in 10 (87%) young people in Orkney rate access to 3G/4G as 'very poor', much higher than the regional average of 47%, and poorest of all H&I areas.

Figure 5.5



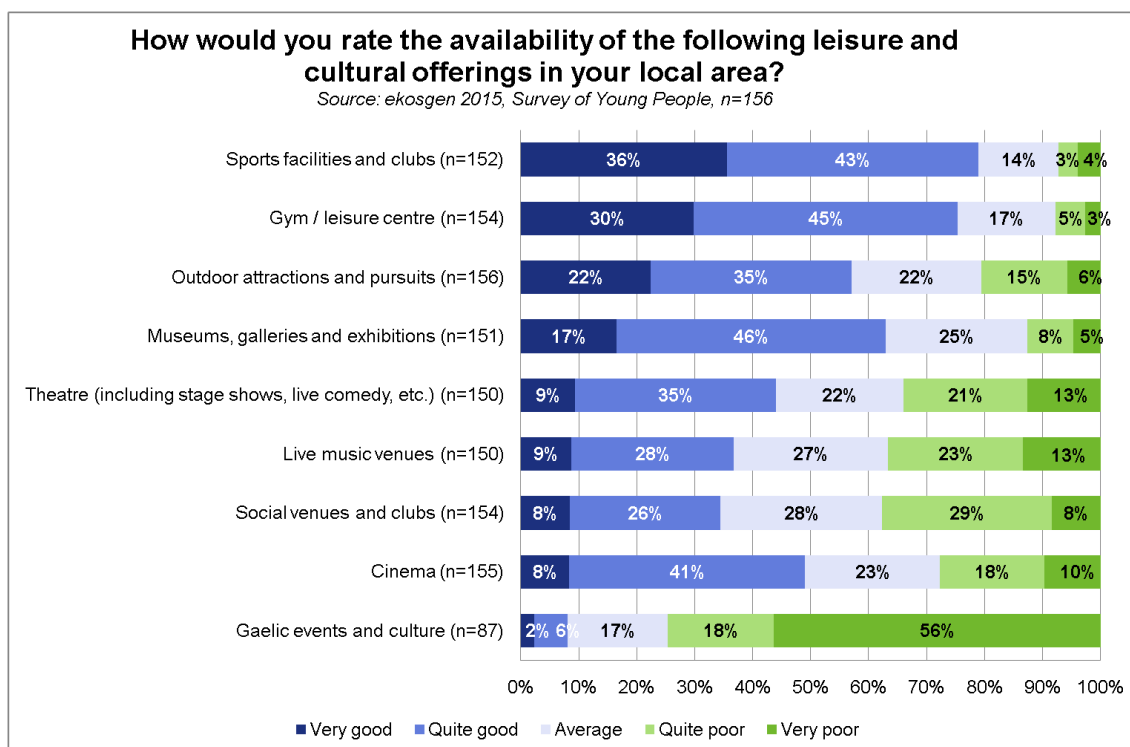
Arts, Leisure and Culture

5.19 As with the H&I as a whole, there is a mixed picture on the perceived availability and strength of the arts, leisure and culture offer in Orkney. In general terms, however, the offer in Orkney is perceived as far more available than by young people in other parts of the H&I region.

5.20 The top three offers perceived to be available in Orkney are sports facilities and clubs (rated as quite or very good by 79% of young people), gym/ leisure centre (by 75%) and museums, galleries and exhibitions (63%). Availability of all three are rated higher than the average across the H&I.

5.21 Access to outdoor attractions and pursuits (57%), cinema (49%) and theatres (44%) are also rated as good, and above the regional average. The availability of live music venues (37%) and social venues and clubs (34%) are deemed slightly less accessible by young people from Orkney, although, again, these are both rated above the average across the H&I.

Figure 5.6



5.22 Young people were asked about the *importance* of these cultural offerings, and there were similarities between availability and importance. Encouragingly, the top three most available leisure and cultural offerings – sports facilities and clubs, gym/ leisure centre and outdoor attractions and pursuits – were also the three most important offerings to young people from Orkney.

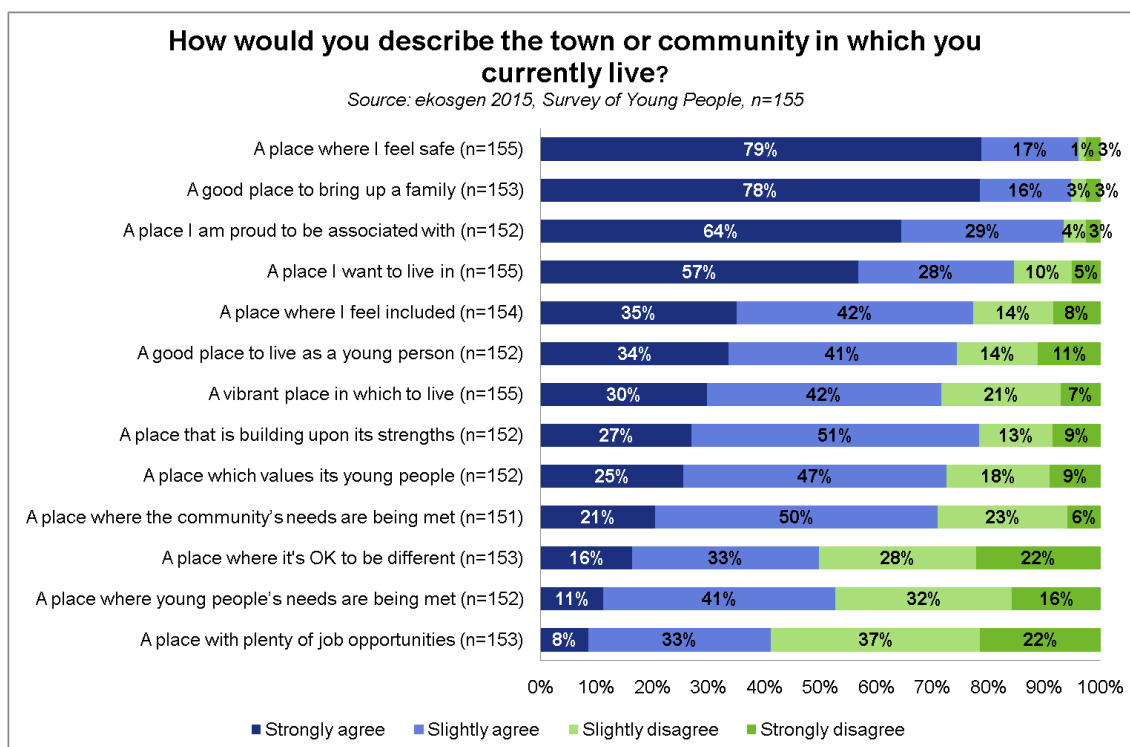
5.23 While having good access to social venues and clubs is important to 78% of young people from Orkney, just 34% rate it as available. Similarly, over seven in 10 young people deem good access to cinema (75%) and live music venues (72%) as important, whereas less than half (49% and 37% respectively) rate these as available. Access to museums, galleries and exhibitions was rated positively by 63% of young people, whereas this is important to just 55%.

Community

5.24 There are some very strong and positive feelings amongst young people from Orkney about the place in which they live. Some 96% feel safe in their local community – the highest of all the H&I areas (along with Shetland), and higher than the regional average of 87%. Similarly, some 93% are proud to be associated with their local community, again the highest of all the H&I areas, along with Shetland, and significantly higher than the regional average of 78%. Young people in Orkney also agree that it is a good place to bring up a family (94%, rising to 100% for those from Kirkwall), again well above the regional average (87%).

5.25 Although over three quarters (77%) of young people in Orkney feel included in their local community, a much smaller proportion (around one half) agrees that it is a place where it's OK to be different (59% in Kirkwall and 42% outwith), and nearly one quarter strongly disagree. The perception about it being/not being OK to be different in Orkney is in line with the H&I as a whole.

Figure 5.7



5.26 As is the case with the other island communities, young people are strongly engaged with their community in Orkney, more so than in the region overall. Over half (51%) attend community events (45% for the H&I as a whole), while over four in 10 (41%) are members of local youth groups or clubs (32% for the H&I) and a similar proportion (40%) undertake volunteer work for the community (31% for the H&I). Just over one fifth (22%) of young people do not participate in the community in any of these ways, which, aside from Shetland (20%), is the lowest level of non-engagement throughout all areas of the H&I.

5.27 Against a number of indicators, Orkney is perceived more positively by its young people than is the case in many other parts of the H&I. This includes being a place where young people want to live (85%, second only to Shetland, and well above the 70% for the H&I), a place that is building upon its strengths (where 78% agree, again second only to Shetland, and above the 63% for the H&I), and being a good place to live as a young person (74% agree, the highest of all H&I areas, and 15 percentage points above the regional average). A lower proportion, just over half (53%) agree that Orkney is a place where young people's need are being met, although this is still significantly above the regional average (41%). Those based in Kirkwall perceive their local community slightly more positively than those living outwith Kirkwall.

6 Future aspirations of Young People in Orkney

6.1 The previous chapters have explored the education, employment, and other lifestyle factors that affect the decisions made by a young person as to whether they leave or stay in Orkney. This chapter looks at the relative importance of these various factors, as well as examining the future aspirations of young people living in Orkney.

Making Orkney an Attractive Place to Live In

6.2 The top five most important themes for young people in Orkney are the same for the H&I as a whole, although ranked differently. Young people in Orkney cite good access to housing (70% saying this is very important) as the most important aspect in making the H&I an attractive area to live (this is consistent both in and outwith Kirkwall). The availability of high quality jobs (63%) and opportunities for career progression (60%) are also very important to young people. Despite some relatively positive views on the availability of jobs (when compared to other parts of the H&I), this remains a significant issue for young people from Orkney. This issue is even more important to those from Kirkwall (67%) than for those living outwith Kirkwall (59%).

6.3 Having affordable transport links (63%) a lower cost of living (62%), good access to FE/HE and mobile connectivity (both 55%) are also deemed important in making the H&I a more attractive place to live, work and study, as with the H&I findings as a whole. Having affordable transport links is ranked as the second most important issue for young people in Orkney, higher than its ranking of fourth across the H&I. A lower cost of living in the region is also relatively important, ranked third, compared to fifth across the H&I.

6.4 There are various differences *within* Orkney. For those in Kirkwall, after good access to housing, the availability of high quality jobs and opportunities for career progression (both 67%) are the most important, whereas for those living outwith Kirkwall, a lower cost of living (63%) and affordable transport links (61%) are critical, following good access to housing.

6.5 As with the H&I overall, mobile connectivity is deemed slightly more important than digital connectivity (NGA) to young people in Orkney, although they are both a much more important aspect to those from Kirkwall.

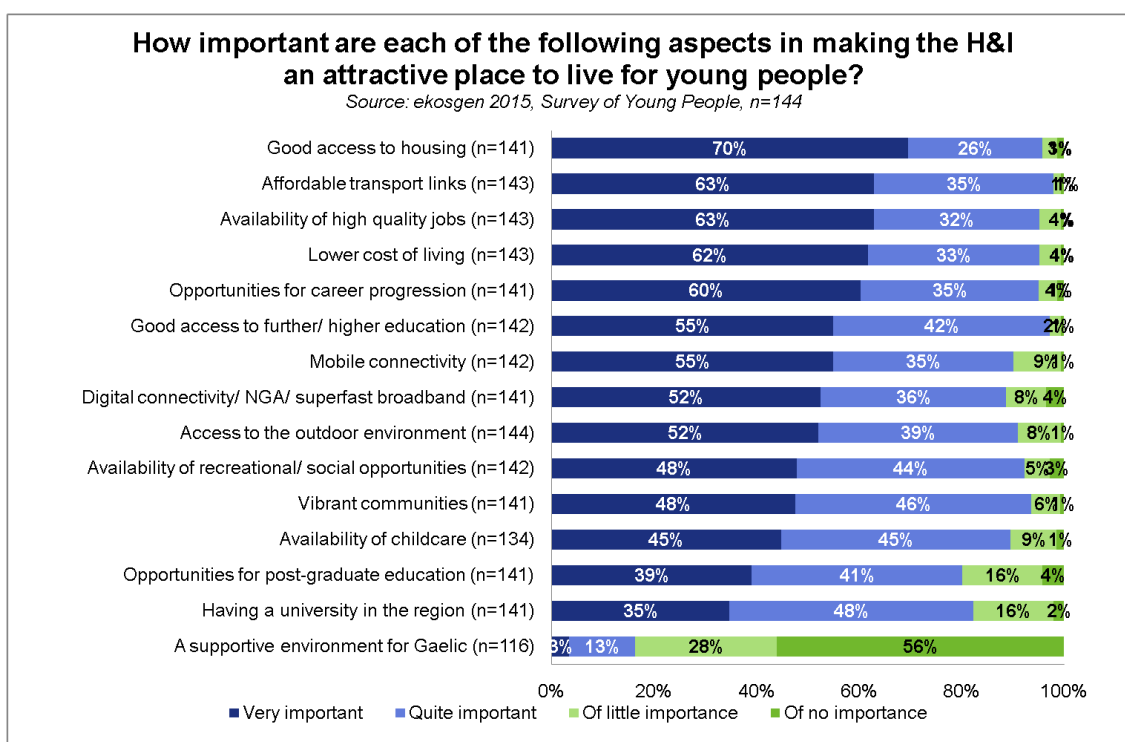
6.6 Opportunities for post-graduate education (39%) and the presence of a university in the region (35%) are deemed less important in Orkney than in the H&I as a whole (45% and 48% respectively).

Table 6.1

Theme	% 'Very Important'	Orkney Ranking	H&I Ranking
Good access to housing	70	1	3
Affordable transport links	63	2=	4=
Availability of high quality jobs	63	2=	1
Lower cost of living	62	3	5
Opportunities for career progression	60	4	2
Good access to FE/HE	55	5=	4=
Mobile connectivity	55	5=	6
Digital connectivity	52	6=	8=
Access to the outdoor environment	52	6=	8=
Availability of recreational/ social opportunities	48	7=	7
Vibrant communities	48	7=	9
Availability of childcare	45	9	11
Opportunities for post-graduate education	39	9	10
Having a university in the region	35	10	8=
A supportive environment for Gaelic	3	11	12

6.7 All of the 15 themes explored in the survey were reported as important for at least 80% of young people in Orkney, and very important for at least 35% of young people, with the exception of a supportive environment for Gaelic, deemed of little/ no importance by over eight in 10 (84%) respondents.

Figure 6.1



Future Aspirations

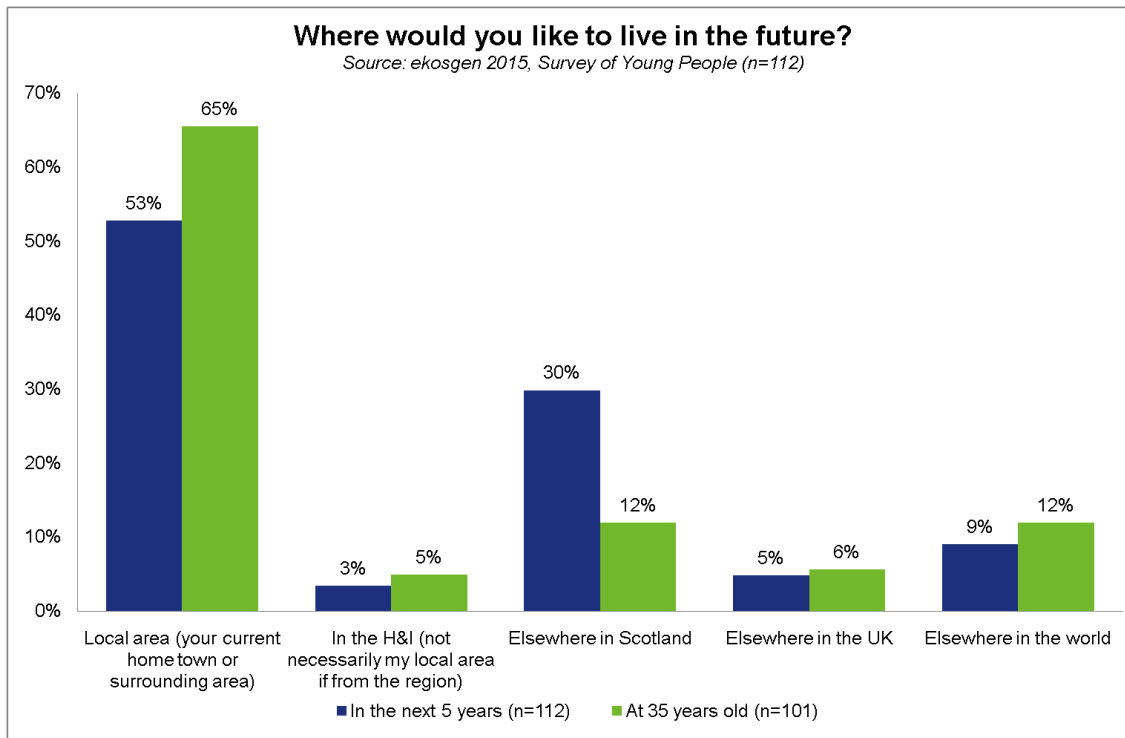
6.8 As there are strong attachments to the local area in terms of community pride, and higher than average proportions thinking Orkney is a good place for young people to live, more wish to remain in the local area in five years' time and at 35. In all, over half (53%) of young people from Orkney would like to live in their local area in five years' time, significantly higher than for the H&I as a whole (36%), and a larger proportion, nearly two thirds (65%) would like to be doing so at 35 years old. This is the highest of all the H&I areas, and well above the region's average of 33%.

6.9 This desire to stay is unsurprising given the relatively positive perceptions of Orkney as a place to live, study and work. For those who wish to leave, the desire to live elsewhere in five years' time is most evident amongst 15-18 year olds (some 80% want to leave their local area), and this group is also more likely to live elsewhere in later life (almost half, 45%, want to live outside their local area at 35 years old).

6.10 This group are likely to be considering FE/HE in the Central Belt of Scotland, as three in 10 young people want to live elsewhere in Scotland (outwith the H&I) in five years' time, and, again, this is most prevalent for the 15-18 age band (63%). However, almost half have indicated that they wish to return to Orkney in later life.

6.11 There is little difference in the desire to stay in the local area between those from Kirkwall and those living outwith, although those living outwith Kirkwall are more likely to want to return to their local area in later life (some 71% want to live in their local area at the age of 35).

Figure 6.2



6.12 Some nine in 10 young people from Orkney either want to be in employment (50%) or studying/ furthering their education (40%) in the next five years. The desire to be in employment at 35 years old rises to almost three quarters (74%) of young people. This future aspiration for employment is higher than across the H&I region (66%), and second only to young people from

the Outer Hebrides (75%). Those from Kirkwall have a slightly higher desire to be in employment in later life than those living outwith Kirkwall.

6.13 A small proportion of young people (6%) wish to be running their own business in five years' time, and, although this rises to 18% at 35 years old, the appetite for self-employment in Orkney is still below the H&I averages (8% and 24%).

How the H&I has changed

6.14 Despite Orkney having the highest proportion of young people wanting to remain living in their local area in the medium term, a smaller proportion (46%) of young people believe the H&I to be better place to live now than it was five years ago, below the H&I average of 51%. Some four in 10 (40%) young people were unsure and a small proportion (14%) felt that the H&I is not a better place to live now than it was five years ago.

6.15 Young people from Orkney, however, hold a more pessimistic perception about life in the H&I in the future, with 44% believing the region will be a better place to live in five years' time – slightly lower than the H&I average of 46%. However, almost four in 10 (39%) respondents are unsure and 17% state the region will not be a better place to live (14% think so regionally). Those from Kirkwall are slightly more optimistic about the future than those living outwith Kirkwall.

7 Conclusions

7.1 In all, 216 young people across Orkney have given their views on their local area and the H&I. This is a good evidence base of what young people are thinking in relation to a whole range of issues. Young people across Orkney are generally positive about their islands and there are strong levels of pride in the local area, where a higher than average proportion describe themselves as committed stayers.

7.2 A large proportion of young Orcadians see themselves living in Orkney in five years' time and at the age of 35. A small proportion are likely to leave due to the desire to take up HE or better employment prospects elsewhere, although many expect to return in later life. The feedback from young people in Orkney is more favourable than the regional average about the quality of the education offering and existence of employment opportunities, and these are factors helping prevent young people from wanting to leave.

Key Summary Findings

Staying and Leaving

- In all, 58% of young people in Orkney describe themselves as committed stayers, above the regional average of 43%;
- Around one in four (27%) are committed leavers, far lower than the 40% for the H&I as a whole. Those from outwith Kirkwall are more likely to see themselves as committed leavers. At 44%, younger people aged 15-18 across Orkney are more likely to see themselves as committed leavers, although this remains below the regional average for this age group cohort of 52%.
- One in 10 are *reluctant* leavers (10%), lower than the 13% across the H&I as a whole, likely to be linked to the higher than average perceptions of good employment opportunities.
- Almost two thirds of young people in Orkney think other young people stay because they have a strong commitment to the local area, and seven in 10 think that they value the quality of life. Six in 10 feel others are lucky to be able to stay, higher than the half or so thinking this across the H&I as whole.
- Some nine in 10 young Orcadians think others who leave do so to broaden their world view, even higher than the regional average of 87%.
- More school pupils wish to attend either college or university, at 84%, than the regional average of 72% for the H&I. This is higher amongst school pupils in Kirkwall (88%) where more wish to attend university, than in the rest of Orkney (63%), where a quarter aspire to FE or an apprenticeship.
- Linked to University attendance aspirations, exam results are the biggest influence on decision-making, at 95%, and higher than the regional average. Other strongly influencing factors are largely in line with regional averages, including the availability of interesting courses (91%), financial support (85%), the range of subjects taken at school (80%) and work placements/work experience (80%), the latter more important in Orkney than regionally.

- Fewer young people than in the rest of the H&I wish to stay locally after school (11% compared to 14%). Six in 10 want to move somewhere in Scotland, but outwith the H&I, with 11% identifying Aberdeen, 21% the Central Belt and 29% elsewhere in Scotland, all higher than the H&I averages.

Education

- Three in four young people in Orkney (75%) perceive there to be a good educational offering in the H&I, much higher than the regional average of 56%. They also think the offering is well aligned to employment opportunities – far more so than in the rest of the region. FE provision is particularly well regarded: 67% rate it as good compared to 54% regionally.
- A slightly higher proportion of young people in Orkney feel *able* to study locally (60%) compared to 57% across the H&I. Within Orkney, perceptions of the ability to undertake remote learning are higher than the H&I average, and more so in Kirkwall.
- That said, more than four in 10 of those in Kirkwall do not think there is a good range of HE/University level or postgraduate opportunities locally. More in Orkney also disagree that there are local courses of interest on offer than the regional average.
- Awareness of UHI is generally higher in Orkney than for the H&I as a whole, as is the level of knowledge they have of it. Those in Kirkwall are marginally more aware of UHI than those outwith Kirkwall.
- More young people in Orkney think that UHI has a credible reputation (53% compared to 42% regionally) and that UHI is comparable to other universities. Two thirds (66%) would be happy to attend, above the 57% regionally.
- Whilst more than half (52%) see graduate placements as improving employment chances, only 30% think there are sufficient graduate opportunities. Specific awareness of ScotGrad is lower in Orkney where 85% are unaware (compared to 79% for the H&I).

Employment

- Young people in Orkney are positive about local employment opportunities. In all, 51% think employment opportunities are good compared to 35% across the H&I. However, less than three in 10 regard career progression opportunities as good (29%), and this is in line with the regional average of 29%.
- Less than four in 10 (38%) think there is good diversity of local employment opportunities, although this is higher than the 29% who think there are diverse local jobs across the region. Those outwith Kirkwall view diversity of employment as better than those in Kirkwall.
- The majority, over six in 10, also consider there to be good opportunities for apprenticeships, compared to 49% for the H&I. This rises to 70% for those outwith Kirkwall.
- Views on local self-employment opportunities are also good. In all, over half think there are good opportunities compared to 35% for the H&I, and those outwith Kirkwall are most likely to see this as a viable option.
- There is a mismatch between those wishing to work locally and those who think there are diverse employment opportunities. Whilst 48% wish to work locally, 38% think there are good

diverse opportunities to do so. This mismatch is most pronounced in Kirkwall. Across Orkney, the 48% wishing to work locally is higher than the 29% average across the H&I.

- Awareness of the H&I growth sectors of Food and drink (73%) and Energy (57%) is particularly high, and higher than the regional averages of 62% and 45% respectively, probably due to the strong presence of these sectors locally. Awareness of Sustainable tourism (69%) is also high, and above the regional average (60%). Interest in working in these sectors is highest for Creative industries and Sustainable tourism (both 32%), closely followed by Energy (31%) and Food and drink (29%) and lowest in Financial and business services and Life sciences (both 23%).
- More young people in Orkney value employers who value a work-life balance (84% compared to 74% for the H&I overall) and those committed to staff development (81% compared to 75%). Fewer are interested in a global outlook from employers (14% compared to 22% regionally) or international activities (10% versus 12% in the H&I).

Housing

- Housing is a significant issue for young people in Orkney, although marginally less so than for the H&I overall. More than half (53%) do not think there is an appropriate choice of housing to buy, compared to 57% across the H&I, and 44% do not think there is a good choice of rental property, compared to 52% regionally.
- Just over four in 10 (42%) believe living costs are affordable, comparable to the 41% across the H&I. The cost of living is felt most acutely outwith Kirkwall, where just under one third (31%) consider it affordable.

Transport

- Transport is ranked the 2nd (equal) most important issue for young people in Orkney in making the H&I a more attractive place to live, more important in Orkney than across the H&I generally. Availability of air and ferry services is considered to be good by two thirds, but both are rated poorly for *affordability* – particularly air travel (by three-quarters). Ferry affordability is rated less favourably, for example, than in the Outer Hebrides where RET has already been introduced.
- Bus travel availability is rated as at least 'quite good' by nearly four in 10 (37%) young people in Orkney, in line with the H&I as a whole. Bus travel *affordability* is highly rated, by just over a half (53%).
- Nearly six in 10 of the young people surveyed (58%) agree that it is easy to travel to other parts of Scotland from Orkney, and easier to do so than to other parts of the H&I.
- Almost four in 10 (38%) agree that public transport timetabling is joined-up, but nearly half (46%) disagree, more than the H&I as a whole (where 39% disagree).

Digital Connectivity

- Standard broadband is available to the majority, 98%, although just a few (2%) had Next Generation Access broadband at the time of reporting. This is expected to increase markedly over the next 12-18 months with the rollout of NGA. Reliability is regarded as poorer than the H&I average, as is speed.

- Just over one in 10 rate mobile coverage as good, far lower than the regional average of 29%, and even lower for those in Kirkwall. A little over one fifth (22%) rate mobile reliability as good, lower than the regional average of 35%. Almost nine in 10 (87%) of young people in Orkney rate access to 3G/4G as 'very poor'.
- Few young people see NGA as beneficial for home/ remote working and learning, despite the desire that is evident for more flexible working and learning.

Arts, Culture and Leisure

- The local cultural offer in Orkney is perceived as far more available than by young people in other parts of the H&I region. Notably, having good access to gyms/ leisure facilities is important for 81% and sports facilities and clubs for 79%, and almost the same proportions regard these as available (79% and 75% respectively).
- Fewer regard social venues and clubs as available (34%), and whilst this is above the regional average, it is still far below the 78% who rate these as important to have.

Community

- Pride in the local community is very high amongst young people in Orkney. In all, 93% agree that they are proud to be associated with their local community – the highest of all the H&I areas, alongside Shetland – and far higher than the 78% regionally.
- Young people are strongly engaged with their community, more so than in the region overall. Orkney is perceived more positively by its young people than is the case for many other parts of the H&I – including being a good place to live as a young person (at nearly three quarters this is the highest of all H&I areas). Those in Kirkwall value their local community even more strongly.

Future Aspirations

- Orkney has a higher than average proportion of young people aspiring to stay in their local area in the future. In all, 65% would like to be doing so at 35 years old (almost double the 33% for the H&I).
- The desire to leave the local area is highest amongst 15-18 year olds – some eight in 10 of this age group wish to live elsewhere in five years' time, although many of this group expect to return in later life, with only 45% wanting to live elsewhere at the age of 35. Those wishing to live locally at 35 is highest outwith Kirkwall, at 71%, and amongst 25-30 year olds, where 72% aspire to do so.
- In all, around 46% of young people see the H&I as being a better place to live than five years ago; that said, a slightly smaller proportion (some 44%), think it will be better in five years' time – just below the regional average (46%).

Concluding Remarks

7.3 The survey of young people in Orkney reveals interesting attitudes and aspirations. Young people are more positive about the education and employment offering than average across the region. They also have very strong attachments to their community, amongst the highest in the region, and most feel it is a good place to be a young person.

7.4 This is positive feedback, and this is reflected in the large proportions of young people wishing to live in Orkney, both in five years' time and at the age of 35. Although some may leave for education purposes, and some for employment, there are good levels of satisfaction with the local education offering and the number of local employment opportunities. There remains a need to widen the local HE offer and to continue to diversify employment opportunities, which whilst more diverse than the regional average, remain rated good by fewer than four in 10. Strong local identity and quality of life factors are part of the reasons young people wish to stay, despite concerns around the costs of travel, ranked as the second most important issue by Orkney's young people.

A. Annex 1: survey response profile

This chapter provides an overview of survey respondents by age, gender, geography and status.

Number of Respondents

In all, 216 young people from Orkney responded to the survey (either online or through a paper version). This represents 5.8% of the total survey sample and a strong confidence level of 95% with a +/-7% margin of error, based on an estimated 15-30 year old Orkney population of 3,717.¹⁹ This provides a robust survey sample and high reliability in the findings.²⁰

Age

Overall, 85 (39%) of those responding were aged 15-18 years, 73 (34%) were aged 19-24 years and 58 (27%) were aged 25-30 years at the time of completing the survey. Again, this provides a robust confidence level of at least 95% with a margin of error between +/-11% and +/-13%.

Survey responses have a slightly higher level of representation for those aged 15-18 years as a result of the higher response rate amongst school pupils. These additional school responses were the product of a targeted approach to gathering data from this age group, a crucial age at which young people make decisions about their future. As a consequence, the survey sample is slightly less representative of those aged 19-30 years.

Table A.1: Orkney Survey Response by Age and Representativeness

Age group	Total (survey)	%	Orkney (%)	+/-
15-18	85	39%	26%	+11%
19-24	73	34%	38%	-4%
25-30	58	27%	36%	-9%
Total	216	100%		N/A

Source: *ekosgen, 2015, Survey of Young People; National Register of Scotland Mid-year Population Estimates (2014).*

Gender

In all, 68% of respondents from Orkney (143) were female, compared to 48% across the H&I. Nearly 29% were male (60) (compared to 52% across the area), while 3% (7) preferred not to say.²¹

For both males and females, this again provides a high level of confidence at 95%, with a +/-8% margin of error for females, and a +/-13% margin of error for males.²²

¹⁹ Census (2011) – area office breakdown provided by Highlands and Islands Enterprise.

²⁰ Please note that a small proportion of young people did not provide answers to all socio-demographic questions. So, while these young people are included in the overall responses, it was not possible to attribute them to age groups; thus, not all of the categories sum to the full 216 responses received.

²¹ Census (2011).

²² Census (2011).

Geography

Respondents were asked to choose the area in which they live – the location of their current family home rather than a temporary residence used for study or short-term contracts. Within Orkney, the majority of respondents (112 – 54%) were from parts of Orkney outside of Kirkwall, and a significant number of respondents were from Kirkwall (95 – 46%).²³

Status

More than one in four respondents (42% - 90) were in employment or self-employed. Just over a third (35%) were school pupils at the time of responding (75), and 17% (36) were a university/college student.

Small numbers responding to the survey were carers or home makers (2% - 4), had finished education, but were not currently in employment or unemployed (1% - 3) or were unemployed (1%). None were undertaking an apprenticeship.

In comparison to the wider sample, respondents from Orkney are more commonly in employment or self-employed, or are school pupils. They are less likely to fall within any of the other categories.

Summary

Although slightly less well represented than other areas, overall a good number of responses were received from young people in Orkney. These responses provide good confidence in the results by age, geography and gender, providing a robust data-set for analysis.

²³ Please note, this is based on the respondents' postcode. There were nine individuals that it was not possible to determine the sub-area for.

www.hie.co.uk



Highlands and Islands Enterprise
Iomairt na Gàidhealtachd 's nan Eilean