

Rural Scotland Data Dashboard: Overview



December 2023

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Highlights

Why was the research needed?

The Scottish Government committed to publishing a Rural Delivery Plan showing how it is delivering for rural Scotland, by 2026. The Rural Scotland Data Dashboard was produced as a compilation of available data evidence to inform the development of the Rural Delivery Plan.

What did we do?

We compiled published data for Rural Scotland into an easy to understand dashboard. The [Rural Scotland Data Dashboard](#) presents data on a range of issues that impact people living and working in rural Scotland. It has eight sections: Economic development; Transport; Housing; Social justice; Population; Digital connectivity; Education and skills; and Health and social care.

[The Scottish Islands Data Dashboard](#) has published separately giving a detailed picture of evidence on the Scottish Islands.

What did we learn?

Rural Scotland varies. Compiling the data in the dashboard gives a broader picture of successes and challenges in rural and island Scotland.

Successes

The dashboard provides evidence of successes in rural Scotland, for example:

- Employment rates are mostly higher in rural areas, and people of working age are most economically active in islands and remote rural areas;
- Confidence in the economic outlook for Scotland has increased amongst rural businesses, who are taking action to help Scotland meet net zero;
- Primary school pupils in accessible rural areas show slightly higher rates of achievement in numeracy than those in urban areas;
- Across Scotland, the highest number of secondary school leavers with a positive destination came from accessible rural and remote rural areas;
- Primary and secondary school pupils in rural and remote rural areas have healthier diets than those in urban areas, and perceptions of general health among school pupils are slightly higher in accessible rural areas;
- Life expectancy is higher in rural Scotland than in urban areas;
- Satisfaction with local health services is relatively high across rural and remote rural areas, and GP to patient ratio is higher in rural Scotland;

- The experiences of both those receiving care and unpaid carers are better in remote rural areas than elsewhere in Scotland.

Challenges

The dashboard also provides evidence of challenges in rural Scotland, in line with long-term, persistent issues, for example:

- Relative poverty rates are increasing in rural areas, but remain slightly lower than those in urban areas;
- Satisfaction with public services is lower in rural areas;
- House prices have risen across rural Scotland since 2019, particularly in accessible rural areas;
- Almost all homes in Scotland can get some broadband access, however the speed and quality is significantly lower in some rural areas;
- Remote rural areas, including islands, have a significantly higher percentage of empty dwellings and second homes than other areas of Scotland;
- Rural properties are, on average, less energy efficient than urban ones, and rates of fuel poverty are estimated to be particularly high on islands;
- Parents and carers in rural areas are less likely to use all of their 1,140 funded hours, and more likely to experience difficulties affording childcare;
- There is a higher reliance on cars in rural areas, and lower use of public transport, with longer journey times to key services;
- Satisfaction among island residents with mainland and inter-island ferry services is relatively low, particularly in terms of reliability and fares.

Next steps

The Scottish Government will publish a Rural Delivery Plan by 2026.

1. Introduction

This report accompanies the **Rural Scotland Data Dashboard** which presents data on a range of issues that impact rural Scotland. This report synthesises the data included in the dashboard into a broader picture of successes, challenges and trends in rural Scotland.

This introduction sets out the purpose of the dashboard, the policy context, and outlines the main trends in the data from across the different sections.

The Rural Scotland Data Dashboard

This report accompanies the Rural Scotland Data Dashboard, which presents data on a range of issues that impact people living and working in rural Scotland, from the economy to transport, health and housing.

The [Rural Scotland Data Dashboard](#) has eight sections:

1. Economic development;
2. Transport;
3. Housing;
4. Social justice;
5. Population;
6. Digital connectivity;
7. Education and skills;
8. Health and social care.

Focusing on trends, successes and challenges, this report brings together data included in the dashboard and summarises the main themes to give a broader picture of rural Scotland. The next section explains the geographical classifications used in this report to define areas of Scotland as remote, rural, accessible and urban. The following sections set out the research and policy context for this work, and outline the wider trends in the data from across the dashboard.

The Scottish Government Urban Rural Classification

The Rural Scotland Data Dashboard and the data referred to in this report uses the [Scottish Government Urban Rural Classification 2020](#)¹ which provides a consistent way of defining urban and rural areas across Scotland.

¹ [Supporting documents - Scottish Government Urban Rural Classification 2020 - gov.scot](#)

It is based on two main criteria:

1. **Population** as defined by the National Records of Scotland
2. **Accessibility** based on drive time to a Settlement with a population of 10,000 or more.

The Scottish Government core definition of rurality classifies areas with a population of fewer than 3,000 people to be rural. The Scottish Government Urban Rural Classification can be collapsed to this core definition, to create a 2-fold classification:

- **Rest of Scotland** – (1) Large Urban Areas, (2) Other Urban Areas, (3) Accessible Small Towns, and (4) Remote Small Towns.
- **Rural Scotland** – (5) Accessible Rural and (6) Remote Rural Areas.

Where further classification is possible by accessibility, multiple forms exist including a 3-fold classification which distinguishes between remote rural, accessible rural and the rest of Scotland, and a 6-fold classification which distinguishes between large urban areas, other urban areas, accessible small towns, remote small towns, accessible rural areas and remote rural areas (see Table 1.1).

Table 1.1 Scottish Government Urban Rural Classification, 6-fold

Class	Class Name	Description
1	Large Urban Areas	Settlements of 125,000 people and over.
2	Other Urban Areas	Settlements of 10,000 to 124,999 people.
3	Accessible Small Towns	Settlements of 3,000 to 9,999 people, and within a 30 minute drive time of a Settlement of 10,000 or more.
4	Remote Small Towns	Settlements of 3,000 to 9,999 people, and with a drive time of over 30 minutes to a Settlement of 10,000 or more.
5	Accessible Rural Areas	Areas with a population of less than 3,000 people, and within a drive time of 30 minutes to a Settlement of 10,000 or more
6	Remote Rural Areas	Areas with a population of less than 3,000 people, and with a drive time of over 30 minutes to a Settlement of 10,000 or more.

An 8-fold classification further distinguishes between remote and very remote regions. Scottish islands are included in these categories.

On occasions where data cannot be categorised by population and accessibility, the Rural Scotland Data Dashboard and figures in this report use the Scottish Government's Rural & Environmental Science and Analytical Services (RESAS) Classification of Local Authorities,² which clusters local authorities according to their level of rurality and establishes four different groups, which are labelled as 'larger cities', 'urban with substantial rural areas', 'mainly rural' and 'islands and remote.'

1.1 Rural Scotland

Rural areas constitute 98% of Scotland's landmass and 17% of its population.³ At the time of the 2011 Census, 93 of Scotland's islands were inhabited.⁴

Rural and island communities across Scotland are diverse and face distinct challenges. This includes both persistent and newer challenges. Persistent challenges include access to services, availability and affordability of housing, fuel costs, transport and population change. Newer challenges include a changing climate and the transition to net zero, with transformations required that will impact the rural workforce across all sectors, alongside wider agricultural and land reform.

In recent years, EU exit, the coronavirus (COVID-19) pandemic and the cost of living crisis have had significant impacts across rural and island Scotland, with rural communities and businesses facing specific challenges such as population change, rising fuel prices and recruitment and retention of staff.⁵

The evidence presented in this dashboard demonstrates the diversity of rural Scotland, with particular differences between accessible mainland rural areas and remote rural and island communities. For Scotland's remote rural and island areas, many of which are sparsely populated, challenges such as distance from main

² [Defining the Rural Economy - Understanding the Scottish rural economy: research paper - gov.scot](#)

³ [Rural Scotland Key Facts 2021 - gov.scot \(www.gov.scot\)](#)

⁴ In 2011, the definition of islands was not the same as the definition used in the Islands (Scotland) Act 2018 [Search | Scotland's Census \(scotlandscensus.gov.uk\)](#). The 2011 definition includes islands located in fresh water bodies whilst the 2018 definition only includes islands surrounded on all sides by the sea.

⁵ [2023 Islands & Rural Insights Report from SRUC \(nisrie.scot\)](#)

centres of population, access to key services and population change are particularly significant.

In many respects the economy of rural Scotland is both similar to, and tightly integrated with, the economy of urban Scotland.⁶ However distinct differences remain, often related to distance from and scarcity of services. The rural economy has undergone significant structural change over the past twenty years.

As outlined above, the rural economy is subject to persistent, key challenges including recruitment and retention of staff, digital connectivity and access to superfast broadband, and fuel costs. The agriculture, forestry and fishing sector accounts for 5% of the rural economy,⁷ so wider changes in terms of agricultural and land reform, and the transition to net zero, will impact people living and working in these sectors in rural Scotland.

1.2 Policy context

The Scottish Government has committed to addressing the climate emergency through a Just Transition, and to working with communities, business, industry and people across Scotland to meet net zero by 2045.⁸

Alongside this, the Scottish Government's [Agricultural Reform Programme](#) sets out the goal for Scotland to become a global leader in sustainable and regenerative agriculture, whilst its [Environment Strategy](#) sets out a long-term vision to protect and restore Scotland's natural environment.

The Scottish Government's [Housing to 2040 strategy](#) sets out an ambition for everyone to have a safe, good quality and affordable home that meets their needs in the place they want to be. This includes rural and island areas.

This year, the Scottish Government committed to publishing a Rural Delivery Plan showing how it is delivering for rural Scotland, by 2026.⁹ In addition to policies on agriculture, land reform, marine, and the [National Islands Plan](#), the Rural Delivery

⁶ See: [Understanding the Scottish rural economy: research paper - gov.scot \(www.gov.scot\)](#)

⁷ [Regional economic activity by gross domestic product, UK - Office for National Statistics \(ons.gov.uk\)](#)

⁸ [Scotland to become a net-zero society - gov.scot \(www.gov.scot\)](#)

⁹ See the Scottish Government's 2023 [policy prospectus](#) and 2023-24 [Programme for Government](#).

Plan will cover areas such as transport, housing, social justice, repopulation, digital connectivity and economic development.

Scotland's National Performance Framework includes [11 National Outcomes](#), in relation to: Children and Young People; Communities; Culture; Economy; Education; Environment; Fair Work and Business; Health; Human Rights; International; and Poverty. Each slide of the Rural Scotland Data Dashboard notes which National Outcome the topic covered broadly aligns to.

Lastly, the Scottish Government's 2023 [policy prospectus](#) sets out three missions:

1. Equality: Tackling poverty and protecting people from harm
2. Opportunity: A fair, green and growing economy
3. Community: Prioritising our public services

The Rural Scotland Data Dashboard is designed to support and inform policy development to achieve these broader aims.

1.3 Wider trends

This section sets out wider trends that can be identified in the data presented as part of the Rural Scotland Data Dashboard, including:

Population trends

The population of rural Scotland continues to grow at a faster rate than the rest of Scotland, driven largely by an increase in accessible rural areas.

However, the rural population as a whole is projected to decline over the next 20 years, particularly in island and remote rural areas. Scotland's overall population is ageing. Over a quarter (27%) of the population of remote rural areas is now aged 65 and over. This will have an impact on rural economies and service provision in remote rural areas.

Variation between rural areas

The evidence points to a lack of progress in economic terms in remote rural areas, and islands, compared to accessible rural and urban areas.

More specifically, there is a notable difference between accessible rural areas and remote small towns. This trend can be seen across a number of areas including economic and health data.



2.1 Population trends

In 2022, the population of Scotland was estimated to be 5.4 million.¹⁰

The population of rural Scotland continues to grow at a faster rate than the rest of Scotland, driven by an increase in accessible rural areas, mainly due to inward migration.¹¹ However, the population of remote rural areas is in decline.

In 2021, 12% of Scottish population was estimated to live in accessible rural areas and 5% in remote rural areas. A further 9% were estimated to live in accessible small towns and 3% in remote small towns. The majority (72%) live in urban areas (NRS, 2021).

In the 10 years between 2011 and 2021, the population of accessible rural areas grew the most (11%), whilst the population of remote small towns showed the biggest decline (4%) (NRS, 2021).

¹⁰ [Scotland's Census 2022 - Rounded population estimates | Scotland's Census](#)

¹¹ [Mid-2021 Small Area Population Estimates for 2011 Data Zones | National Records of Scotland](#)

However, the population of rural areas is projected to decline over the next 20 years. In island and remote rural areas the population is already in steady decline, and is projected to drop by 12% between 2018 and 2043.¹²

Scotland's population as a whole is ageing. Over a quarter (27%) of the population of remote rural areas is now aged 65 and over, compared to 16% in large urban areas. Rural areas have a lower percentage of people aged 16-44 years old, with 31% for accessible rural areas compared to 43% in large urban areas.¹³ This will have an impact on rural economies and service provision in remote rural areas.

On average, people in cities tend to be younger and people in rural areas tend to be older. Remote rural areas had the highest median age at 51 years, whereas large urban areas had the lowest median age at 38 years.¹⁴ Rural Scotland has a higher percentage of 'older smaller' households, where one or both adults are of pensionable age.

Recent analysis indicates that Scotland has some of the most sparsely populated regions in Europe, and these areas face particular demographic challenges including low birth rates (SRUC, 2023 and JHI, 2018).

This report also highlights the changing age profile of Scotland's rural and island populations, with trends including declining school age populations and increasing retirement age populations in remote rural mainland, very remote rural mainland and island areas (SRUC, 2023). In line with this, population projections by National Records of Scotland show the highest percentage reduction in children and working age population, and the highest increase in pensionable age population, in islands and remote rural areas.¹⁵

2.2 Variation between rural areas

¹² There are some areas with a high level of population growth, for example the Orkney Islands.

See: NRS 2020 [Population Projections for Scottish Areas \(2018-based\) | National Records of Scotland \(nrscotland.gov.uk\)](https://www.nrscotland.gov.uk/publications/population-projections-for-scottish-areas-2018-based), compiled by RESAS classification of local authorities. This classification categorises local authorities according to their level of rurality and establishes four different groups.

¹³ [Mid-2021 Small Area Population Estimates for 2011 Data Zones | National Records of Scotland \(nrscotland.gov.uk\)](https://www.nrscotland.gov.uk/publications/mid-2021-small-area-population-estimates-for-2011-data-zones)

¹⁴ [Mid-2021 Small Area Population Estimates for 2011 Data Zones | National Records of Scotland \(nrscotland.gov.uk\)](https://www.nrscotland.gov.uk/publications/mid-2021-small-area-population-estimates-for-2011-data-zones)

¹⁵ [Population Projections for Scottish Areas \(2018-based\) | National Records of Scotland \(nrscotland.gov.uk\)](https://www.nrscotland.gov.uk/publications/population-projections-for-scottish-areas-2018-based)

The Rural Scotland Data Dashboard also points to differing challenges in remote rural and island areas, in comparison with accessible rural and urban areas. This can be seen in economic terms, for example:

- Gross Value Added (GVA) has increased at a slower rates in islands and remote rural areas than elsewhere in Scotland over the last two decades.
- There is a higher proportion of higher earners in accessible rural areas (32%) than in remote rural areas (23%).
- Median gross annual pay for all full-time employees is higher in accessible rural areas than in remote rural areas.
- From October to December 2023 it is estimated that almost half (47%) of island households will be in fuel poverty, compared to a third (33%) of mainland households.

It can also be seen in terms of transport, housing and education, for example:

- Remote rural and island areas have a significantly higher percentage of empty and second homes than urban areas.
- Distances to key services, including GPs, post offices and secondary schools, are longer in remote rural mainland areas than in accessible rural areas and the rest of Scotland.
- The highest percentage of 16-19 year olds participating in education is in accessible rural areas, with the lowest in remote small towns.

This is line with wider research. For example, a 2023 report by Scotland's Rural College found that very remote rural mainland areas, as well as islands, are facing some of the most significant demographic challenges, including: slow population growth; ageing populations; fewer children; high levels of vacant and second home ownership, and affordable housing issues.¹⁶

There is also a notable difference between accessible rural areas and remote small towns. This trend can be seen across a number of areas including the economy and education. For example:

- The proportion of the working age population claiming Universal Credit is highest in remote small towns (21%), compared to 9% in accessible rural areas and 14% across Scotland as a whole.

¹⁶ [2023 Islands & Rural Insights Report from SRUC \(nisrie.scot\)](https://www.nisrie.scot/2023-Islands-Rural-Insights-Report)

- Primary school pupils in accessible rural areas show higher rates of achievement in literacy than those in remote rural areas.

One area in which this trend is reversed, however, is health. For example, satisfaction with local health services is highest in remote rural areas, which also have the highest General Practitioner to patient ratio. The experiences of both those receiving care, and unpaid carers, are also better in remote rural areas.

The following sections bring together a range of data from the Rural Scotland Data Dashboard, focusing on successes and challenges, followed by a Conclusion and Recommendations based on these findings.

2. Successes



- The Gross Value Added (GVA) for rural local authorities in 2021 was £39,075 million (26% of the Scottish total).
- Employment rates for males and females are mostly higher in rural areas. People of working age are most economically active in islands and remote rural areas.
- Confidence in the economic outlook for Scotland has increased amongst rural businesses since late 2022.
- Rural businesses are taking action to help Scotland meet net zero by 2045, including by reducing their emissions and by upskilling or reskilling their staff.
- In 2021-22, the majority of secondary school leavers in rural areas had a positive destination. Across Scotland, this was highest in accessible rural (95%) and remote rural (95%) areas and lowest in remote small towns (92%).
- The proportion of 16-19 year olds in rural areas that were participating in education, training or employment in 2022 was also in line with the rest of Scotland.
- Both life expectancy and healthy life expectancy are higher in rural Scotland than in urban areas. They are highest in remote rural areas.
- Overall, satisfaction with local health services is relatively high across rural and remote rural areas, including islands.
- GP to patient ratios are higher in rural Scotland. It is highest in remote rural areas.
- Perceptions of general health among school pupils are slightly higher in accessible rural areas than in remote rural and urban areas.
- Primary and secondary school pupils in rural and remote rural areas have healthier diets than those in urban areas.
- The experiences of both those receiving care and unpaid carers are better in remote rural areas, than elsewhere in Scotland.

2.1 Economy

The dashboard provides evidence of economic successes in rural Scotland, in terms of economic activity, incomes in accessible rural areas, and the actions being taken by rural businesses to meet net zero targets by 2045.

The Gross Value Added (GVA) for rural local authorities in 2021 was £39,075 million (26% of the Scottish total). GVA was highest in larger cities at 41%, followed by urban with substantial rural areas at 33%; mainly rural areas at 23%; and lowest in island and remote areas at 3%. GVA fell across Scotland in 2019-20 following EU exit, and then recovered.¹⁷

Economic activity and inactivity rates are comparable in accessible and remote rural areas, and the rest of Scotland. People of working age are most economically active in islands and remote rural areas at 78%, compared to 74% in mainly rural areas and larger cities.¹⁸

Employment rates for males and females are mostly higher in rural areas. For females aged 16 to 64 the highest employment rate is in accessible rural areas (74%) while for males aged 16 to 64 it is in remote rural areas (84%). Overall, employment rates for males aged 16 to 64 are higher than for females aged 16 to 64 in all areas of Scotland.¹⁹

Self-employment is more common in rural Scotland. Almost a quarter of people in remote rural areas (23%) are self-employed, compared to 16% in accessible rural areas and 9% in the rest of Scotland. More employees in remote rural areas have a second job than anywhere else.²⁰

Incomes are higher in accessible rural areas than the rest of Scotland. The annual net income of the highest income householder was £40,001 and over in almost a third (32%) of accessible rural households, compared to less than a quarter (23%) of households in both remote rural areas and the rest of Scotland.²¹

¹⁷ [Regional gross value added \(balanced\) by industry A and BDE: Scottish Government \(SG\): Rural and Environmental Science and Analytical Services \(RESAS\) classification for the rural economy, 1998 to 2021 - Office for National Statistics \(ons.gov.uk\)](#)

¹⁸ [Sub-Scotland Economic Statistics Database - gov.scot \(www.gov.scot\)](#)

¹⁹ [Scotland's Labour Market: People, Places, and Regions - Statistics from the Annual Population Survey 2019 - gov.scot \(www.gov.scot\)](#)

²⁰ [Scotland's Labour Market: People, Places and Regions – Protected Characteristics. Statistics from the Annual Population Survey 2021 - gov.scot \(www.gov.scot\)](#)

²¹ [Scottish household survey 2019: annual report - gov.scot \(www.gov.scot\)](#)

Small and Medium-sized Enterprises (SMEs) employ more people in both accessible and remote rural areas than in the rest of Scotland. Micro businesses (0-9 employees) account for almost half (45%) of employment in remote rural areas and over a third (35%) in accessible rural areas, compared to only 15% in large urban areas (using a 6-fold urban-rural classification).²²

Confidence in the economic outlook for Scotland has increased amongst rural businesses and many are taking action to help Scotland meet net zero by 2045.²³ In 2023, two fifths (40%) of businesses in the Highlands and Islands stated that they are already reducing emissions, and a further 7% said they were intending to within six months.²⁴ Over a third (34%) of businesses are either already measuring their carbon emissions (27%) or intending to do so within six months (7%).

Over two thirds of businesses in the Highlands and Islands (68%) were taking action in relation to the energy efficiency of their premises, or planning to within six months. The most common action being taken or planned was surveying premises for energy efficiency (50%).

2.2 Education and skills

The Rural Scotland Data Dashboard points to mixed success in rural and remote rural areas in terms of educational measures.

In literacy, primary school pupils in accessible rural areas show higher rates of achievement than those in remote rural areas. In 2021-22 almost three quarters (73%) of primary school pupils in accessible rural areas achieved the expected Curriculum for Excellence Level for reading. This was lower in remote rural areas (64%) and remote small towns (61%).²⁵

In numeracy, primary school pupils in accessible rural areas show higher rates of achievement than those in urban areas. Again, the number of primary school pupils in 2021-22 who achieved the expected Curriculum for Excellence Level in numeracy was lower in remote rural areas.²⁶

²² [Supporting documents - Businesses in Scotland: 2022 - gov.scot \(www.gov.scot\)](https://www.gov.scot/supporting-documents/businesses-in-scotland-2022)

²³ [Business Panel | Highlands and Islands Enterprise | HIE](#)

²⁴ [HIE Business Panel Surveys - 2023 | HIE](#)

²⁵ [Achievement of Curriculum for Excellence levels: 2021/22 - gov.scot \(www.gov.scot\)](https://www.gov.scot/achievement-of-curriculum-for-excellence-levels-2021-22)

²⁶ [Achievement of Curriculum for Excellence levels: 2021/22 - gov.scot \(www.gov.scot\)](https://www.gov.scot/achievement-of-curriculum-for-excellence-levels-2021-22)



Recent figures suggest that primary and secondary school pupils in both rural and urban Scotland have a positive attitude to school. The majority (80-81%) of pupils across rural and remote rural areas agreed that they enjoy learning new things.²⁷

School leaver attainment is similar in both rural and urban areas, and has remained largely the same over time. For example, in 2021-22 the majority (97%) of mainstream secondary school leavers in both remote rural areas and accessible rural areas had 1 or more SCQF Level 4 or better. This is the same as in 2017-8.²⁸

The majority of secondary school leavers in rural Scotland in 2021-22 had a positive destination. Across Scotland, this was highest in accessible rural (95%) and remote rural (95%) areas and lowest in remote small towns (92%). The highest percentage of school leavers in employment was in remote rural areas (43%).²⁹

In terms of apprenticeships, in 2021 almost two fifths of (37%) Foundation Apprenticeship³⁰ starts at Scottish Credit and Qualifications Framework (SCQF)

²⁷ [Health and Wellbeing Census Scotland 2021- 2022 - gov.scot \(www.gov.scot\)](https://www.gov.scot/resources/publications/2022/02/20220201-health-and-wellbeing-census-scotland-2021-2022/)

²⁸ [Summary statistics for follow-up leaver destinations, no. 5: 2023 edition \(www.gov.scot\)](https://www.gov.scot/resources/publications/2023/01/20230101-summary-statistics-for-follow-up-leaver-destinations-no-5-2023-edition/)

²⁹ [Summary statistics for follow-up leaver destinations, no. 5: 2023 edition \(www.gov.scot\)](https://www.gov.scot/resources/publications/2023/01/20230101-summary-statistics-for-follow-up-leaver-destinations-no-5-2023-edition/)

³⁰ Foundation Apprenticeships (FA) offer school pupils the opportunity to gain a qualification (at SCQF 4-6) through a blend of academic and employer-led work-based learning.

Level 6 in Scotland were in Mainly Rural areas. This has increased since 2016, when 29% were in Mainly Rural areas.³¹

In 2022-23, almost a third (29%) of all Modern Apprenticeship³² starts in Scotland were in mainly rural areas, with 3% in islands and remote rural areas. In the same period, just over a tenth of employed 16-24 year olds in islands and remote rural areas (13%), and mainly rural areas (11%) were Modern Apprentices, compared 9% in urban with substantial rural areas, and only 5% in larger cities.³³

The proportion of 16-19 year olds that were participating in education, training or employment in rural areas in 2023 was 96%; slightly above the overall figure for Scotland (94%). The highest percentage of 16-19 year olds participating in education in 2023 was in large urban areas (74%), with the lowest in remote small towns (64%). Participation in employment was highest in remote rural areas (28%) and remote small towns (29%).³⁴

In 2022, over two fifths (41%) of rural businesses stated that they are currently taking action to upskill or reskill their staff, or plan to. They are looking for specific skills. Food and drink businesses were more likely to be seeking skills in low carbon (60%), whilst tourism businesses were more likely to be looking to develop customer or client-facing skills (82%).³⁵

2.3 Health and social care

Life expectancy is higher in rural Scotland. It is highest in remote rural areas, at around 79 years for males and around 83 for females.³⁶ Healthy life expectancy is also higher in rural Scotland. In 2019-21, healthy life expectancy for females in remote rural areas was around 66 years, almost six years higher than for females in large urban areas (60.6 years).³⁷

³¹ [Foundation Apprenticeships | Skills Development Scotland](#)

³² The Modern Apprenticeship (MA) programme provides people aged 16 and over the opportunity to secure industry-recognised qualifications while earning a wage.

³³ [Modern Apprenticeships | Skills Development Scotland](#)

³⁴ [Annual Participation Measure | Skills Development Scotland](#)

³⁵ [Rural Scotland Business Panel Survey October 2022 - gov.scot \(www.gov.scot\)](#)

³⁶ It should be noted that there is an overall increasing trend in life expectancy at birth for both males and females in Scotland. See: [Life Expectancy in Scotland, 2019-2021 | National Records of Scotland \(nrscotland.gov.uk\)](#)

³⁷ Healthy life expectancy is an estimate of lifetime spent in "very good" or "good" health, based on how individuals perceive their general health.



Overall, satisfaction with local health services is relatively high across rural and remote rural Scotland. Satisfaction is highest in remote rural areas (85%) and lowest in accessible small towns (71%), compared to 80% in large urban areas.³⁸ On islands, the majority of islanders (84%) agree they could easily access a GP.³⁹

On average, there are more General Practices (GPs) per patient in rural areas. In remote rural areas, there are around 2,200 patients for every GP compared to over 4,500 in accessible rural areas and 6,500 in large urban areas.

General Practitioner to patient ratio is higher in rural Scotland. It is highest in remote rural areas (14.8 per 10,000 patients) and accessible rural areas (9.7), and lowest in other urban areas (8.1).⁴⁰

Perceptions of general health among primary and secondary school pupils in accessible rural areas are slightly higher than in remote rural and urban areas. Over three quarters rated their health as 'good or excellent' (76%) compared to 74% in remote rural areas and 72% in remote small towns.⁴¹

³⁸ [Scottish Household Survey 2021 - telephone survey: key findings - gov.scot \(www.gov.scot\)](https://www.gov.scot/publications/scottish-household-survey-2021-telephone-survey-key-findings/pages/12.aspx)

³⁹ [National Islands Plan Survey Final Report \(www.gov.scot\)](https://www.gov.scot/publications/national-islands-plan-survey-final-report/pages/12.aspx)

⁴⁰ [General Practice - GP Workforce and practice list sizes 2012 - 2022 - Public Health Scotland](https://www.gov.scot/publications/general-practice-gp-workforce-and-practice-list-sizes-2012-2022/pages/12.aspx)

⁴¹ [Health and Wellbeing Census Scotland 2021- 2022 - gov.scot \(www.gov.scot\)](https://www.gov.scot/publications/health-and-wellbeing-census-scotland-2021-2022/pages/12.aspx)

Primary and secondary school pupils in rural and remote rural areas have healthier diets than those in urban areas. For example, 40% of pupils in remote rural areas eat vegetables at least once a day, 10% more than in large urban areas. In accessible rural and remote rural areas, pupils were most likely to eat fruit once a day.⁴²

Experience of care is better in remote rural areas. For example, 69% of people receiving care, surveyed in remote rural areas, agreed that they feel supported to live as independently as possible, compared to 65% in large urban areas. The highest percentage of people who agreed that the help, care or support they receive improved or maintained their quality of life were in remote rural areas (68%), followed by remote small towns (63%), higher than in Scotland as a whole (60%).⁴³

The experiences of unpaid carers are also most positive in remote rural areas, where over a third (35%) that they feel supported to continue caring. They are least positive in accessible rural areas, where less than a quarter (24%) agreed.⁴⁴

There is a mixed picture in terms of other health data. Emergency hospital admissions are lower in remote rural and accessible rural areas than in the rest of Scotland. In contrast, the highest rates for cancer admissions are in remote rural areas, with the lowest cancer admission rate being in accessible rural areas.⁴⁵

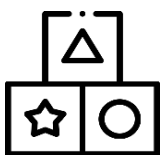
⁴² [Health and Wellbeing Census Scotland 2021- 2022 - gov.scot \(www.gov.scot\)](https://www.gov.scot/publications/health-wellbeing-census-scotland-2021-2022/pages/112.aspx)

⁴³ [Health and Care Experience Survey 2021/22: National Results - gov.scot \(www.gov.scot\)](https://www.gov.scot/publications/health-care-experience-survey-2021-22-national-results/pages/112.aspx)

⁴⁴ [Health and Care Experience Survey 2021/22: National Results - gov.scot \(www.gov.scot\)](https://www.gov.scot/publications/health-care-experience-survey-2021-22-national-results/pages/112.aspx)

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3. Challenges



- Relative poverty has increased in rural Scotland over the last decade, but remains slightly lower than urban areas.
- People in rural areas, particularly remote rural and island communities, face higher costs of living.
- From October to December 2023 it is estimated that almost half (47%) of island households will be in fuel poverty.
- Satisfaction with public services is lower in rural areas than urban areas of Scotland.
- There are well-known challenges with childcare provision in rural Scotland. Parents and carers in rural areas are less likely to use all of their 1,140 funded hours, and more likely to have experienced difficulties affording childcare.
- Access to affordable and suitable housing is a long-standing rural issue and house prices have risen across rural Scotland since 2019, particularly in accessible rural areas.
- Almost all homes in Scotland can get some broadband access, however the speed and quality is significantly lower in some rural areas.
- Remote rural areas, including islands, have a significantly higher percentage of empty dwellings and second homes than other areas of Scotland, and wider research indicates that second home ownership is one factor driving house price inflation in many rural areas.
- There is low satisfaction with housing among islanders, with less than a fifth (19%) agreeing that there is enough housing available to meet local demand.
- Rural properties are, on average, both larger and less energy efficient than those in urban areas.
- There is a higher reliance on cars in rural areas, and lower use of public transport, with journey times to key services longer than elsewhere in Scotland.

This chapter focuses on challenges for rural Scotland that can be identified in the Rural Scotland Data Dashboard.

A number of persistent and related challenges make life in Scotland's rural and island communities more difficult, particularly in terms of accessing services, availability and affordability of housing, heightened by house price rises and second home ownership, higher reliance on cars, rising living costs, rising poverty and fuel poverty.

3.1 Economy

The dashboard provides evidence of economic challenges in rural Scotland. For example, economic growth has not been even across rural Scotland. Between 2007 and 2019, Gross Value Added (GVA) increased at a slower rate in islands and remote rural local authorities than it did in other local authorities.⁴⁶

The percentage of high growth registered private sector businesses 2012-2022 has declined across all areas of Scotland since 2012. A significant drop occurred from 2018-2021 and 2019-2022. The highest percentage change was in Mainly Rural areas (down 32%) with other areas dropping 22-23% in that period.⁴⁷

There is also a mixed picture in terms of rural incomes. For example, there is a higher proportion of higher earners in accessible rural areas (32%) than in remote rural areas (23%). The most common income bracket for a household in both remote rural areas and the rest of Scotland is the £10,001 to £20,000 category, while in accessible rural areas it is the £40,001 and over category.⁴⁸

Median gross annual pay for all full-time employees is highest for people living in accessible rural areas. It is lowest for those living in remote rural areas. In rural areas the median wage for females is higher than that for males, while in the rest of Scotland the male median wage is higher. Median hourly rates of pay for both females and males were highest in accessible rural areas (£16.26) and lowest in remote rural areas (£14.19).⁴⁹

⁴⁶ [Regional gross value added \(balanced\) by industry A and BDE: Scottish Government \(SG\): Rural and Environmental Science and Analytical Services \(RESAS\) classification for the rural economy, 1998 to 2021 - Office for National Statistics \(ons.gov.uk\)](#)

⁴⁷ [Businesses in Scotland: 2022 - gov.scot \(www.gov.scot\)](#)

⁴⁸ [Scottish household survey 2019: annual report - gov.scot \(www.gov.scot\)](#)

⁴⁹ [Rural Scotland Key Facts 2021 - gov.scot \(www.gov.scot\)](#)

Across Scotland, the proportion of employers with underutilised staff – at least one employee with skills and qualifications more advanced than required for their current job role – fell marginally in 2020 to 33% compared to 35% in 2017 but then rose again to 37% in 2022. In the Highlands and Islands the proportion increased during this period. In 2020, over a third (36%) of employers in the Highlands and Islands had under-utilised staff and this figure remained unchanged in 2022.⁵⁰

Similarly, whilst the average proportion of adults with no or low qualifications fell in Scotland overall by 5% between 2010 and 2020, in mainly rural areas it fell by 4%, and in islands and remote rural areas by only 1%.⁵¹

Satisfaction with public services is lower in rural areas than urban areas of Scotland. Less than half of adults living in accessible rural areas (45%) and remote rural areas (48%) were satisfied with the quality of public services (local health services, schools and public transport), in comparison to 58% of adults living in large urban areas.⁵²

3.2 Cost of living

There is widespread evidence that people in rural areas, and remote rural and island communities in particular, experience higher costs of living for some goods and services, for example weekly food costs. Additional minimum living costs for households in remote rural Scotland typically add 15-30% to a household budget, compared to urban areas of the UK.⁵³

Rural employment rates often compare favourably with urban areas although it is well-known that rural incomes can be volatile and precarious. Slightly higher pay in rural Scotland (than urban) can still be inadequate to meet basic needs, as goods are more expensive in remote rural communities⁵⁴.

⁵⁰ [Scottish Employer Skills Survey 2020 - gov.scot \(www.gov.scot\) and UK Employer Skills Survey 2022 - Scotland Report](#)

⁵¹ [Scotland's Labour Market: People, Places and Regions – background tables and charts 2020/21 \(www.gov.scot\)](#)

⁵² [Scottish Household Survey 2021 - telephone survey: key findings - gov.scot \(www.gov.scot\)](#)

⁵³ [The cost of remoteness - reflecting higher living costs in remote rural Scotland when measuring fuel poverty: research report - gov.scot \(www.gov.scot\)](#)

⁵⁴ [The cost of remoteness - reflecting higher living costs in remote rural Scotland when measuring fuel poverty: research report - gov.scot \(www.gov.scot\)](#)

People in accessible rural areas earn more than those in remote rural areas. Median gross annual pay (before taxation and other deductions) for all full-time employees is highest for people living in accessible rural areas. It is lowest for those living in remote rural areas. In all areas of Scotland the median gross annual pay is higher for males than females. In remote rural areas the difference is £4,790 and in accessible rural areas the difference is £3,878.⁵⁵

Fuel poverty rates continue to be higher in remote rural and island areas.⁵⁶ From October 2023, it is estimated that there will be 150,000 fuel poor households in rural areas (a fuel poverty rate of 35%) and 680,000 in urban areas (a fuel poverty rate of 33%). From October to December 2023 it is estimated that 47% of island households will be in fuel poverty, compared to 33% of mainland households.⁵⁷

The average energy efficiency profile of rural properties is lower than that for urban, and dwelling characteristics associated with lower energy efficiency are disproportionately represented in rural areas.⁵⁸

Rural households are at risk of fuel poverty for reasons including: over half (65%) of rural dwellings are not within the coverage of the gas grid, and are therefore dependent on alternative fuel types that are more expensive; rural properties are on average 31% larger than urban dwellings and therefore cost more to heat; 28% of dwellings in rural locations use oil as a primary heating source. In urban locations, oil is used in less than 1% of dwellings.⁵⁹

In 2021, nearly three quarters (73%) of island residents surveyed said that their heating bills had increased in the past year. Over one in ten (13%) stated that they could not afford to keep their home warm in the past year, and around a tenth (8%) said they have had to choose between keeping their home warm and buying food or essentials for themselves and their family.⁶⁰

⁵⁵ [Rural Scotland Key Facts 2021 - gov.scot \(www.gov.scot\)](https://www.gov.scot/resources/documents/2021/04/Rural_Scotland_Key_Facts_2021.pdf)

⁵⁶ For the definition of fuel poverty, see: [Supporting documents - Tackling fuel poverty in Scotland: a strategic approach - gov.scot \(www.gov.scot\)](https://www.gov.scot/resources/documents/2023/08/Supporting_documents_-_Tackling_fuel_poverty_in_Scotland_a_strategic_approach.pdf)

⁵⁷ Fuel poverty rate estimates produced by the Scottish Government's Communities Analysis Division following Ofgem's energy price cap announcement in August 2023. Note: fuel poverty rates increased April to June 23 due to the removal of the universal £400 [Energy Bills Support Scheme](https://www.gov.scot/resources/documents/2023/06/Energy_Bills_Support_Scheme.pdf).

⁵⁸ [Scottish house condition survey: 2019 key findings - gov.scot \(www.gov.scot\)](https://www.gov.scot/resources/documents/2019/04/Scottish_house_condition_survey_2019_key_findings.pdf)

⁵⁹ [Scottish house condition survey: 2019 key findings - gov.scot \(www.gov.scot\)](https://www.gov.scot/resources/documents/2019/04/Scottish_house_condition_survey_2019_key_findings.pdf)

⁶⁰ [National Islands Plan Survey: final report - gov.scot \(www.gov.scot\)](https://www.gov.scot/resources/documents/2023/06/National_Islands_Plan_Survey_final_report.pdf)

3.3 Social justice

In 2019-22, poverty rates in rural areas (18%) were slightly lower than those in urban areas (21%). However, the proportion of people in each category who are in relative poverty in rural Scotland has gradually increased since 2006-9 from 15% to 18%.⁶¹

Relative poverty is increasing in rural areas. There are people in poverty in all areas of Scotland. Our highest concentrations are in large urban areas, however 220,000 individuals in Rural Scotland are still living in relative poverty after housing costs (2019-22 estimate).⁶² That is around 1 in 5 of all people living in poverty in Scotland. That number has risen from 160,000 in 2006-09, but the proportion of the people in poverty who live in rural Scotland has remained at about 1 in 5 of the people in poverty in Scotland overall.

Overall compound deprivation levels (combining multiple indicators of deprivation) are lower in rural areas. This is because, whilst there are households on low incomes, the areas where these homes are located are less likely to have higher levels of housing deprivation, unemployment or crime. Individuals living in severe poverty after housing costs have also risen from around 100,000 in 2010-13 to around 150,000 in 2019-22.

There are lower levels of child poverty in rural areas in Scotland compared to urban areas, with 18% of rural children living in relative poverty, compared with 27% of urban children. In 2019-22, child poverty rates in rural areas (18%) were lower than those in urban areas (27%) and Scotland as a whole (24%), but have stayed relatively stable since 2006-9, when 19% of children were in relative poverty in rural Scotland. The [Scottish Child Payment](#) for low-income families with children under six was introduced in February 2021.

Fewer pupils in accessible rural and remote rural areas are registered for Free School Meals than in urban areas.⁶³ However, wider research indicates that the stigma attached to applying for free school meals can prevent rural parents whose children are eligible from taking this up ([Gruffudd et al, 2017](#)).

Levels of food insecurity for children and young people are similar across urban and rural Scotland. Almost a tenth of primary and secondary school pupils in

⁶¹ [Poverty and income inequality statistics - gov.scot \(www.gov.scot\)](#)

⁶² [Poverty and income inequality statistics - gov.scot \(www.gov.scot\)](#)

⁶³ [Pupil census supplementary statistics - gov.scot \(www.gov.scot\)](#)

remote rural (8%) and remote small towns (9%) stated that they 'always or often' go to school or bed hungry, compared to 7% in accessible rural areas.

There are well-known challenges with rural childcare provision, from the availability of services, including wraparound care, to issues faced by providers such as changes in demand and recruitment of staff. Parents and carers in rural areas (66%) are less likely to use all of their 1,140 funded hours than those in urban areas (75%). In rural areas, two thirds (66%) of parents have experienced difficulties affording childcare, compared to a smaller number (61%) in urban areas.⁶⁴

There is little difference between the percentage of the population in each area of Scotland that claims Scottish benefits. A slightly higher percentage of the population claim benefits in remote small towns (2% compared to 1% elsewhere).⁶⁵

Almost a tenth (9%) of Social Security Scotland clients are in accessible rural areas, with a small number in remote rural (2%) and very remote rural areas (2%). This is comparable for specific benefits, such as the Scottish Child Payment and Job Start Payment.⁶⁶ The proportion of the working age population claiming Universal Credit is highest in remote small towns (21%) where it is 7 percentage points above the national average (14%). This is followed by other urban areas (17%). The proportion is lowest in accessible rural areas (9%).⁶⁷

3.4 Housing

Access to affordable housing is a long-standing issue in some parts of rural Scotland, and is often connected to other challenges impacting the rural economy, including workforce recruitment and retention in remote rural and island communities.

⁶⁴ [Early learning and childcare - parents' views and use: survey findings 2022 - gov.scot \(www.gov.scot\)](https://www.gov.scot/publications/early-learning-and-childcare-parents-views-and-use-survey-findings-2022/pages/1-2.aspx)

⁶⁵ [Social Security Scotland client diversity and equalities analysis to May 2021 \(www.gov.scot\)](https://www.gov.scot/publications/social-security-scotland-client-diversity-and-equalities-analysis-to-may-2021/pages/1-2.aspx)

⁶⁶ [Social Security Scotland client diversity and equalities analysis to May 2021 \(www.gov.scot\)](https://www.gov.scot/publications/social-security-scotland-client-diversity-and-equalities-analysis-to-may-2021/pages/1-2.aspx)

⁶⁷ Bespoke data compiled from People on Universal Credit in July 2023, Department of Work and Pensions [Stat-Xplore](https://www.gov.uk/stat-xplore), and Working Age Population Estimates, [National Records of Scotland 2021](https://www.gov.uk/national-records-of-scotland).



Remote rural areas have a significantly higher percentage of empty dwellings (5%) and second homes (6%) than other areas of Scotland.⁶⁸ This percentage can be particularly high in specific areas, such as islands. Ensuring that empty homes are maintained, improved and put to the best possible use forms part of the Scottish Government's [Housing to 2040 strategy](#).

There is low satisfaction with housing among islanders. In a 2020 survey, the majority (71%) agreed there is a high proportion of holiday lets or second homes in their local area. Less than a fifth (19%) agreed there is enough housing available to meet local demand. Over half (60%) disagreed.⁶⁹

A recent report by Scotland's Rural College indicates that second home ownership is a driver of house price inflation in many rural areas, with over half (51%) of residential transactions in island and remote rural local authorities being cash sales, compared to 27% in larger cities (SRUC 2023).

⁶⁸ In Scotland as a whole, 3.3% of all dwellings are empty dwellings (5%) and 0.9% are second homes. See: [Households and Dwellings in Scotland, 2021 | National Records of Scotland \(nrscotland.gov.uk\)](#)

⁶⁹ [National Islands Plan Survey: final report - gov.scot \(www.gov.scot\)](#)

House prices are rising across rural Scotland, particularly in accessible rural areas.⁷⁰ In 2022-23, the average price of a residential property in rural areas was £271,436 compared to £202,588 in urban areas. Accessible rural areas are on average the most expensive area to purchase a property.⁷¹

Between 2021-22 and 2022-23, residential property prices increased across all areas of Scotland. Remote small towns saw the largest rise in average residential property price with an increase of 13% (Registers of Scotland, 2023).

Furthermore, the number of new build housing completions increased in mainly rural areas, but decreased in remote rural and island areas, between 2011-2021. In 2021, there were over 8,500 new build housing completions in urban with substantial rural areas, compared to around 6,000 in mainly rural areas and less than 500 in islands & remote rural areas.⁷²

3.5 Transport

The Rural Scotland Data Dashboard also points to another ongoing challenge in rural areas, which relates to accessibility and transport.

There is higher reliance on driving as a means of transport in rural areas, and drive times to key services including GPs, primary and secondary schools, and shops are longer. In remote rural areas, 63% people live within a 15 minute drive time to a secondary school, compared to 91% of people in accessible rural areas and 100% of people in the rest of Scotland.⁷³

Transport costs are also higher in rural and island areas, particularly for working-age households and pensioners.⁷⁴ Residents in rural areas are more likely than those elsewhere to spend over £100 per month on fuel for their cars.⁷⁵

⁷⁰ Properties sold in rural areas are likely to have a different underlying profile of size and type. For example, houses are on average 38% larger in rural areas. See: [Scottish House Condition Survey: 2021 Key Findings \(www.gov.scot\)](https://www.gov.scot/resources/documents/2022/04/Scottish_House_Condition_Survey_2021_Key_Findings.pdf)

⁷¹ [Property market report 2022-23 - Registers of Scotland \(ros.gov.uk\)](https://ros.gov.uk/property-market-report-2022-23)

⁷² [Housing statistics quarterly update: new housebuilding and affordable housing supply \(www.gov.scot\)](https://www.gov.scot/resources/documents/2022/04/Housing_statistics_quarterly_update_new_housebuilding_and_affordable_housing_supply.pdf)

⁷³ [Rural Scotland Key Facts 2021 - gov.scot \(www.gov.scot\)](https://www.gov.scot/resources/documents/2021/04/Rural_Scotland_Key_Facts_2021.pdf)

⁷⁴ [The cost of remoteness - reflecting higher living costs in remote rural Scotland when measuring fuel poverty: research report - gov.scot \(www.gov.scot\)](https://www.gov.scot/resources/documents/2022/04/The_cost_of_remoteness_reflecting_higher_living_costs_in_remote_rural_Scotland_when_measuring_fuel_poverty_research_report.pdf)

⁷⁵ [Scottish household survey 2019: annual report - gov.scot \(www.gov.scot\)](https://www.gov.scot/resources/documents/2019/04/Scottish_household_survey_2019_annual_report.pdf)



Adults in rural areas are more likely to drive to their place of work or education, and less likely to take public transport, than those living in the rest of Scotland.⁷⁶ Fewer than half of people living in accessible rural (47%) and remote rural (40%) areas of Scotland live within a 15 minute drive time to a GP by public transport, this compares to 92% in the rest of Scotland.⁷⁷

Satisfaction with public transport is lower in rural areas. Adults living in remote rural (44%) and accessible rural (53%) areas are much less satisfied with the quality of public transport than those in large urban areas (78%).⁷⁸ Young people living in rural areas and islands face barriers to bus use including timetables, frequency of buses, limited route options, and a lack of bus stops nearby.⁷⁹

People living in Scotland's island communities are particularly reliant on ferries to and from the mainland, but levels of satisfaction with these services are relatively low. In a 2020 survey, just over half (58%) of island residents agreed that the mainland ferry service is reliable, but less than half (42%) agreed that ferry fares to and from the mainland are good value for locals.⁸⁰

⁷⁶ [Scottish household survey 2019: annual report - gov.scot \(www.gov.scot\)](https://www.gov.scot/publications/scottish-household-survey-2019-annual-report/pages/100-to-109.aspx)

⁷⁷ [Rural Scotland Key Facts 2021 - gov.scot \(www.gov.scot\)](https://www.gov.scot/publications/rural-scotland-key-facts-2021/pages/1.aspx)

⁷⁸ [Scottish Household Survey 2021 - telephone survey: key findings \(www.gov.scot\)](https://www.gov.scot/publications/scottish-household-survey-2021-telephone-survey-key-findings/pages/1.aspx)

⁷⁹ [Baseline data report - June 2022 - Young Persons' Free Bus Travel Scheme | Transport Scotland](https://www.gov.scot/publications/baseline-data-report-june-2022-young-persons-free-bus-travel-scheme/pages/1.aspx)

⁸⁰ [National Islands Plan Survey: final report - gov.scot \(www.gov.scot\)](https://www.gov.scot/publications/national-islands-plan-survey-final-report/pages/1.aspx)

3.6 Digital Connectivity

Almost all homes in Scotland can get some broadband access, however the speed and quality is significantly lower in some rural areas.

Ofcom estimated that in 2022 around 8,000 premises in Scotland (residential and commercial) could not access either a decent broadband service, or good 4G mobile coverage. Almost all of these premises are in rural Scotland.⁸¹

In rural Scotland,⁸² coverage from superfast or newer higher-speed services is consistently lower (superfast broadband coverage is 79% in rural areas compared to 99% in urban areas and gigabit-capable coverage is only 34% in rural areas compared to 80% in urban areas in 2023). Ofcom estimate that 18,000 premises in Scotland (residential and commercial) still do not have access to a 'decent' broadband service with speeds above 10mb/s via either a fixed or wireless network.⁸³

Scotland has the lowest geographic 4G network coverage of any UK nation however Scottish premises have 4G coverage close to the UK average. In-vehicle coverage on major roads by at least one operator is 96% for 4G and 99% for voice calls however across all operators it is 55% for 4G and 72% for voice calls.⁸⁴

4G coverage by all mobile network operators in rural areas is considerably lower than urban areas although coverage has increased since 2022. People in these rural areas have less service provider choice and risk having no signal away from built-up areas.⁸⁵

⁸¹ [Connected Nations 2022: Scotland report \(ofcom.org.uk\)](https://www.ofcom.gov.uk/consult/condocs/cn2022/cn2022-scotland-report/)

⁸² Note: Ofcom defines a rural area as having a population of 2,000 or less

⁸³ [Connected Nations 2023 - Scotland report \(ofcom.org.uk\)](https://www.ofcom.gov.uk/consult/condocs/cn2023/cn2023-scotland-report/)

⁸⁴ [Connected Nations 2023 - Scotland report \(ofcom.org.uk\)](https://www.ofcom.gov.uk/consult/condocs/cn2023/cn2023-scotland-report/)

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4. Conclusions

This report has outlined the main successes and challenges that can be identified from the Rural Scotland Data Dashboard and situated this work in relation to the wider policy context and Scottish Government commitments.

The main conclusions are:

- The Rural Scotland Data Dashboard demonstrates the diversity of Scotland's rural, remote and island communities, and the need to consider this diversity in designing and delivering policy.
- The overall population of rural Scotland is projected to decline over the next 20 years. Demographic change is also expected to result in a decline in the school age population and an increase in the retirement age population. This trend presents a future challenge for rural Scotland, particularly in terms of the long-term sustainability of remote rural and island communities.
- The dashboard points to disparities between remote, island and accessible rural areas. This ranges from economic growth, to higher rates of fuel poverty. These issues will be compounded by the population trends referenced above.
- The dashboard provides evidence of successes in rural Scotland, particularly in terms of employment and economic activity, and health. However, it also points to a range of challenges, in line with long-term, persistent issues such as access to affordable housing, travel distances and transport, and fuel poverty.
- Relative poverty has increased in rural Scotland over the last decade. Whilst it has been long understood that people in rural areas, particularly remote rural and island communities, face higher costs of living, the drivers for this increase should be examined through further research.

This report has summarised the main successes and challenges that can be identified from the [Rural Scotland Data Dashboard](#), which presents data on a range of issues that impact people living and working in rural Scotland.

As the data outlined above demonstrates, rural and island communities across Scotland are incredibly diverse and face distinct challenges, from persistent challenges such as affordable housing, transport and fuel costs, to newer challenges such as a changing climate and the transition to net zero. In addition to this, EU exit, the coronavirus (COVID-19) pandemic and cost of living crisis have had significant impacts across rural and island Scotland, with rural communities

and businesses facing specific challenges related to rising fuel prices and retention of staff.

4.2 Successes

The dashboard provides evidence of successes in rural Scotland, particularly in terms of employment and economic activity, and health:

- Employment and economic activity rates are higher in rural areas;
- Confidence in the economic outlook for Scotland has increased amongst rural businesses, who are taking action to meet net zero;
- Across Scotland, the highest number of secondary school leavers with a positive destination was in accessible rural and remote rural areas;
- Both life expectancy and healthy life expectancy are higher in rural Scotland than in urban areas. They are highest in remote rural areas;
- Overall, satisfaction with local health services is relatively high across rural and remote rural areas, and GP to patient ratios are higher in rural Scotland;
- Primary and secondary school pupils in rural and remote rural areas have healthier diets than those in urban areas, and perceptions of general health among school pupils are slightly higher in accessible rural areas;
- The experiences of both those receiving care and unpaid carers are better in remote rural areas than elsewhere in Scotland.

4.3 Challenges

The dashboard also provides evidence of challenges in rural Scotland, in line with long-term, persistent challenges such as access to affordable housing, travel distances and accessible transport, and fuel poverty:

- Relative poverty has increased in rural Scotland over the last decade.
- Rural properties are, on average, less energy efficient than urban ones, and rates of fuel poverty are estimated to be particularly high in islands;
- Satisfaction with public services is lower in rural areas;
- House prices have risen across rural Scotland since 2019, particularly in accessible rural areas;
- Almost all homes in Scotland can get some broadband access, however the speed and quality is significantly lower in some rural areas;
- Remote rural areas, including islands, have a significantly higher percentage of empty dwellings and second homes than other areas of Scotland;

- Parents and carers in rural areas are less likely to use all of their 1,140 funded hours, and more likely to have experienced difficulties affording childcare;
- There is a higher reliance on cars in rural areas, and lower use of public transport, with longer journey times to key services;
- Satisfaction among island residents with mainland and inter-island ferry services is relatively low, particularly in terms of reliability and fares.

Significantly, relative poverty has increased in rural Scotland over the last decade. Whilst it has been long understood that people in rural areas, particularly remote rural and island communities, face higher costs of living, the drivers for this increase should be examined through further research.

Population decline in parts of rural Scotland will continue to present challenges. The population of rural Scotland continues to grow at a faster rate than the rest of Scotland, driven by an increase in accessible rural areas. However, the population of rural areas is projected to decline over the next 20 years. In island and remote rural areas the population is already in steady decline.

Scotland's population as a whole is ageing. A larger proportion of the population of remote rural areas is now aged 65 and over, compared to urban areas. Rural areas also have a lower percentage of people aged 16-44 years old.

Wider analysis highlights the changing age profile of Scotland's rural and island populations, with trends including declining school age populations and increasing retirement age populations in remote rural mainland areas, very remote rural mainland areas, and island areas (SRUC, 2023). These population changes present future challenges for rural Scotland, particularly for islands and remote rural areas, and will have long-term implications for the sustainability of rural communities.

4.3 Variation between rural areas

The Rural Scotland Data Dashboard also points to variation between remote rural and island areas and accessible rural areas. These variations will be compounded by the population trends identified above.

This variation can be seen in economic terms, from slower GVA growth in islands and remote rural areas, to higher median gross annual pay in accessible rural areas. It can also be seen in a number of other areas. For example, remote rural and island areas have a significantly higher percentage of empty and second

homes; distances to key services are longer in remote rural mainland areas; and island households have higher rates of fuel poverty than mainland households.

There is also a notable difference between accessible rural areas and remote small towns. This trend can be seen, for example, in economic and education data: the proportion of the working age population claiming Universal Credit is highest in remote small towns, and primary school pupils in accessible rural areas show higher rates of achievement in literacy than those in remote rural areas. One area in which this trend is reversed, however, is health.

In summary, the Rural Scotland Data Dashboard demonstrates the diversity of Scotland's rural, remote rural and island communities, and the need to consider both areas of progress and persistent issues in the context of recent challenges – such as the coronavirus (COVID-19) pandemic and the cost of living crisis – and future challenges, from population change to enabling a Just Transition.

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Any enquiries regarding this publication should be sent to us at

The Scottish Government
St Andrew's House
Edinburgh
EH1 3DG

ISBN: 978-1-83521-820-4 (web only)

Published by The Scottish Government, December 2023

Produced for The Scottish Government by APS Group Scotland, 21 Tennant Street, Edinburgh EH6 5NA
PPDAS1399974 (12/23)

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