

Trends in Rural Scotland (2025): a working paper



AGRICULTURE, ENVIRONMENT AND MARINE

Trends in Rural Scotland (2025): a working paper



Walker at St Abbs Head Nature Reserve
Source: [flickr](#)

January 2025

Highlights

Why was the research needed?

This compilation of key trends in Rural Scotland can be used for a variety of purposes. One of these purposes is to establish baseline trend evidence to measure progress against the vision outlined in the Scottish Government's forthcoming Rural Delivery Plan. It also extends and up-dates information in the [Rural Scotland Data Dashboard](#) and the [Rural Scotland Data Dashboard: Overview](#) (2023).

What did we do?

We have compiled time series data for a variety of topic areas in order to highlight increasing or decreasing trends. The data is primarily gathered from published sources. Some bespoke data has been created where it was not already available for Rural Scotland. Geographic breakdown of the data allows a comparison between Rural Scotland and the rest (or all) of Scotland. Where possible, a separation has been made for mainland Rural Scotland and Island data.

What did we learn?

Rural Scotland is varied. Positive aspects of Rural Scotland compared to Urban Scotland include lower relative poverty and child poverty rates and a higher satisfaction with health and social care.

Challenges exist in Rural Scotland around transport, fuel poverty and housing. There is greater dissatisfaction with public transport, greater fuel poverty, as well as a greater proportion of second and vacant homes in remote rural areas.

However, exploration of trends, such as those for health and social care, show that many variables, despite being more favourable in Rural Scotland, are worsening over time. In areas such as economy and digital, where Rural Scotland is behind the Scottish average, variables appear to be improving over time.

Generally, Rural Scotland follows the general trends (whether something is improving, maintaining, or worsening) averaged across all areas of Scotland, though rates of change differ by area and variable.

What happens next?

The Scottish Government will publish a Rural Delivery Plan by 2026. Key Performance Indicators will be chosen to monitor the Rural Delivery Plan outcomes.

Executive Summary

Successes

- Agricultural, Forestry and Fishing Gross Value Added (GVA) continues to increase in rural areas.
- Rural Scotland experienced a recent positive annual percentage change in population.
- Youth employment rates are highest in rural areas.
- Rural Scotland, excluding islands and remote areas, continues to have the highest incidence of renewable electricity generation.
- Satisfaction with local health services is relatively high across rural and remote rural areas, with greater access to GP services and higher assessed quality of care experience.
- Life expectancy is higher in rural Scotland than in urban areas for both male and females. Mental wellbeing also remains higher in rural areas despite general downward trends in Scotland.
- The experiences of those receiving care are better in remote rural areas than elsewhere in Scotland.
- Relative poverty and relative child poverty rates remain lower than those in urban areas.

Challenges

- Rural properties are, on average, less energy efficient than urban ones, and rates of fuel poverty are estimated to be particularly high on islands and remote rural areas.
- There is a higher reliance on cars in rural areas, and lower use of public transport, with longer journey times to key services (shopping centres, post offices, and general practices (GPs)).
- Satisfaction with public transport is lower in rural areas.
- Remote rural areas, including islands, have a significantly higher percentage of empty dwellings and second homes than other areas of Scotland.
- House prices have risen across rural Scotland since 2019, particularly in accessible rural areas. This trend is seen across Scotland.
- Almost all homes in Scotland can get some broadband access, however the speed and quality is lower in some rural areas.

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Photo by Scottish Government

List of acronyms

EPC	Energy Performance Certificate
GVA	Gross Value Added
GP	General Practitioner
ITL regions	International Territorial Level regions
MIS	Minimum Income Standard
MWh	Megawatt-hour
Ofcom	The Office of Communications
RdSAP	Revised Standard Assessment Procedure
RESAS	Rural and Environmental Science and Analytical Services
SAP	Standard Assessment Procedure
SCQF	Scottish Credit and Qualifications Framework
SG	Scottish Government
WEMWBS	Warwick-Edinburgh Mental Well-being Scale

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Introduction

Policy Background

The Scottish Government has committed to publishing a Rural Delivery Plan showing how it is delivering for Rural Scotland by 2026. This is set out in the Scottish Government's 2023 policy prospectus [Equality, opportunity, community: New leadership - A fresh start](#) and the [2023-24 Programme for Government](#). The 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 Deputy First Minister and Cabinet Secretary for Finance has stated:

“Reforming public services will mean that, by 2026, in partnership with Local Government, trade unions and the third sector, amongst others, I will have: Published a Rural Delivery Plan, showing how all parts of the Scottish Government are delivering for rural Scotland. As well as policies on agriculture, land reform, marine, and our Islands Plan, this will cover areas such as transport, housing, social justice, repopulation, digital connectivity and economic development.”

The vision for the Rural Delivery Plan is:

“...for a vibrant, sustainable, equal and inclusive rural Scotland, with its diverse rural, island and coastal communities thriving across economic, social and environmental dimensions, feeding, powering, inspiring, providing homes and livelihoods to, and nurturing the wellbeing of current and future generations”.

Other relevant policy includes the National Islands Plan, Just Transition agenda which commits Scotland to meeting net zero targets by 2045, and the Scottish Government's Agricultural Reform Programme.

Scotland's [National Performance Framework](#) monitors 11 national outcomes for the whole of Scotland. Not all indicators have had breakdowns for rural Scotland.¹

¹ It should be noted that the [National Performance Framework](#) indicators are currently under review.

A tailored set of Key Performance Indicators will be produced to monitor the effectiveness of policy in Rural Scotland, including the new Rural Delivery Plan.

The [Rural Scotland Data Dashboard](#) was produced in 2023 as a compilation of available data evidence to inform the development of the Rural Delivery Plan.

Further Rural Scotland time series data has been compiled to highlight trends over time. This current Key Trends in Rural Scotland publication should be regarded as a background working paper.

Topics

Key trends data has been compiled for nine different topics:

1. Agriculture and Marine
2. Transport
3. Housing
4. Population and skills
5. Environment and Climate Change
6. Economy and Digital
7. Health and social care
8. Culture
9. Social Justice

Geography

Data in this report uses the Scottish Government Urban Rural Classification, which provide a consistent way of defining urban and rural areas across Scotland. The most recent data uses the [2020 SG Urban Rural Classification](#) whereas earlier data from previous years uses the most relevant classification at the time of publishing.

The classification 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. The form of classification used depends on the source data in question; some surveys and datasets are unable to split data into lower-level geographies.

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, this report uses the [Scottish Government's Rural & Environmental Science and Analytical Services \(RESAS\) Classification of Local Authorities](#), 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.'

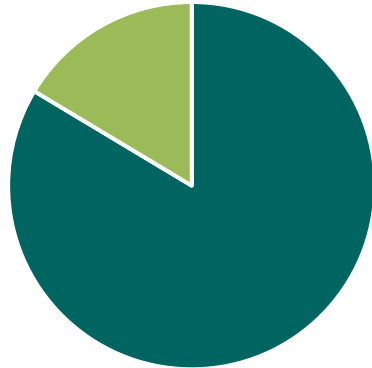
Some datasets do not use these definitions of rurality, including the Cost of Remoteness publication which uses categories 4 and 6 (remote small towns and remote rural areas) of the SG 6-fold Urban Rural classification 2016 as its definition of remote and the Ofcom data which uses [Locale classification](#) of urban and rural premises.

Classifying by population and accessibility does not allow for the separation of island and mainland rural data. To remedy this, bespoke data has been requested from sources which have data-zone level collection. The [Scottish island regions 2023: overview](#) data-zone based classification for Scottish island regions allows for the identification of island areas which can be extracted to produce Scottish mainland only data. Some data-zones overlap both island and mainland areas, so there is a degree of error with this data.

Scottish Mainland-only data can also be produced by separating those local authorities which are completely made up of islands: Shetland Islands Council, Orkney Islands Council, and Comhairle nan Eilean Siar. However, according to the [Islands \(Scotland\) Act 2018](#) which defines an Island as a 'naturally formed area of land that is surrounded on all sides by the sea ignoring artificial structures e.g. bridges, and is above water at high tide,' Argyll and Bute Council, Highland Council

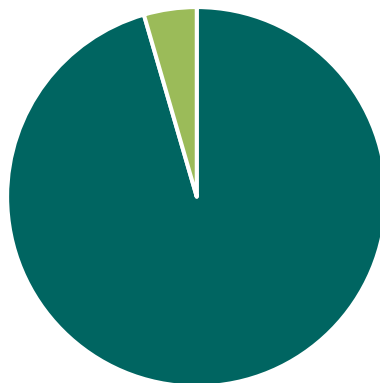
and North Ayrshire Council also encompass islands in addition to a significant amount of mainland. Thus, there is also some degree of error with this method also.

Argyll and Bute Council

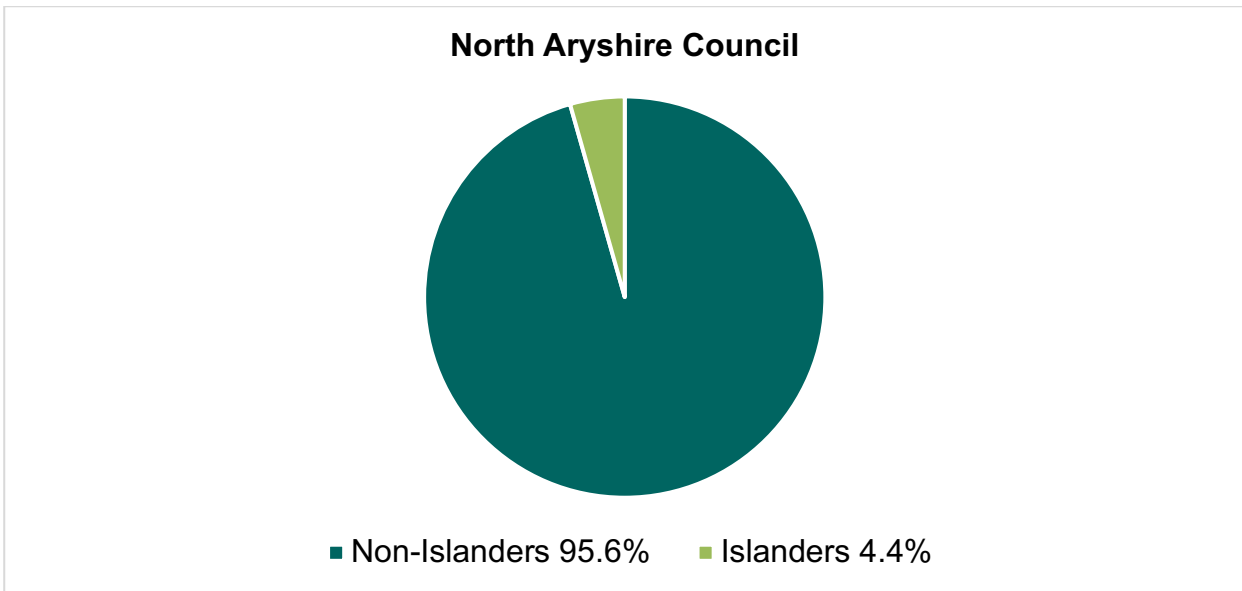


■ Non-Islanders 83.6% ■ Islanders 16.4%

Highland Council



■ Non-Islanders 95.5% ■ Islanders 4.5%



It has been explored on a practical level whether the Rural data could be produced just for Mainland Scotland Rural areas. Where possible, Island data has been extracted and separated. Due to a lack of availability of separate data, islands are generally included. While some useful outputs can be produced from this process, much of the data has significant errors and should be approached with caution.



In terms of geographic classification, islands are split between Remote Small towns and Remote Rural Areas.

Time Series Trends


This time series trends report primarily involves the use of secondary and published data.



The time period covered by the data in this report means that time series results were affected by the Coronavirus (COVID-19) pandemic. The impact varies by dataset. For survey sources which were impacted (Scottish Household Survey and Scottish House Condition Survey), data from 2020 and 2021 has been excluded as it is not comparable to other waves of surveys/reports. For others sources, 2020 and 2021 data is comparable but the impacts of the Coronavirus (COVID-19) pandemic must taken into consideration when interpreting the findings.

Summary of change in variables over time in Rural Scotland context



<p>Agriculture and Marine</p> 	<p>Improving</p> <ul style="list-style-type: none"> • Scottish Gross Value Added (GVA) by sector, Agriculture, Forestry and Fishing sectors • Percentage (%) employment by sector, Agriculture, Forestry and Fishing sector <p>Maintaining</p> <ul style="list-style-type: none"> • Percentage (%) employment by sector, Agriculture, Forestry and Fishing sector <p>Performance data unavailable or not applicable</p> <ul style="list-style-type: none"> • Sustainability of Fish Stocks • Marine sector – Gross Value Added (GVA), turnover and employment
<p>Transport</p> 	<p>Improving</p> <ul style="list-style-type: none"> • How easy or difficult people find it to afford transport costs • Satisfaction with the quality of public transport <p>Maintaining</p> <ul style="list-style-type: none"> • Percentage (%) of population within 15-minute drive time by public transport of key service • How adults usually travel to work / education <p>Worsening</p> <ul style="list-style-type: none"> • Weekly travel costs in different Minimum Income Standard (MIS) budgets²



² This data is from 2022. 2023 data is not yet available. A marked increased in perceived affordability of transport costs was recorded in 2023 compared to 2022.

<p>Housing</p> 	<p>Improving</p> <ul style="list-style-type: none">• Proportion of rural households rated Energy Performance Certificate (EPC) C or above <p>Maintaining</p> <ul style="list-style-type: none">• Proportion (%) of all dwellings that are second homes• New Build Housing Completions <p>Worsening</p> <ul style="list-style-type: none">• Proportion (%) of all dwellings that are short-term or long-term vacant homes• Average residential property price• Homes in fuel poverty• Percentage of dwellings with urgent disrepair to critical elements
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<p>Population and skills</p> 	<p>Improving</p> <ul style="list-style-type: none"> • Population growth, 2001-2021 • Percentage of employed 16-24 year-olds that are Modern Apprentices • The proportion of 16-19 year-olds in Scotland participating in employment. <p>Maintaining</p> <ul style="list-style-type: none"> • Population by age, mid-2021 estimates • Working age employment rate (residence based) • The proportion of 16-19 year olds in (rural) Scotland participating in training <p>Worsening</p> <ul style="list-style-type: none"> • Projected percentage change in population • The proportion of 16-19 year olds in Scotland participating in education • Child developmental concerns at 13-15 month, 27-30 month, 4-5 year review <p>Performance data unavailable or not applicable</p> <ul style="list-style-type: none"> • Economic activity of population aged 16-64 • Average proportion (%) of adults aged 16 to 64 whose highest qualification was Scottish Credit and Qualifications Framework (SCQF)³ level 4 or below
<p>Environment and Climate Change</p> 	<p>Improving</p> <ul style="list-style-type: none"> • Renewable Electricity Generation (MWh) <p>Maintaining</p> <ul style="list-style-type: none"> • Percentage (%) of household waste recycled <p>Performance data unavailable or not applicable</p> <ul style="list-style-type: none"> • Sustainability of fish stocks • Clean Seas • Biodiversity

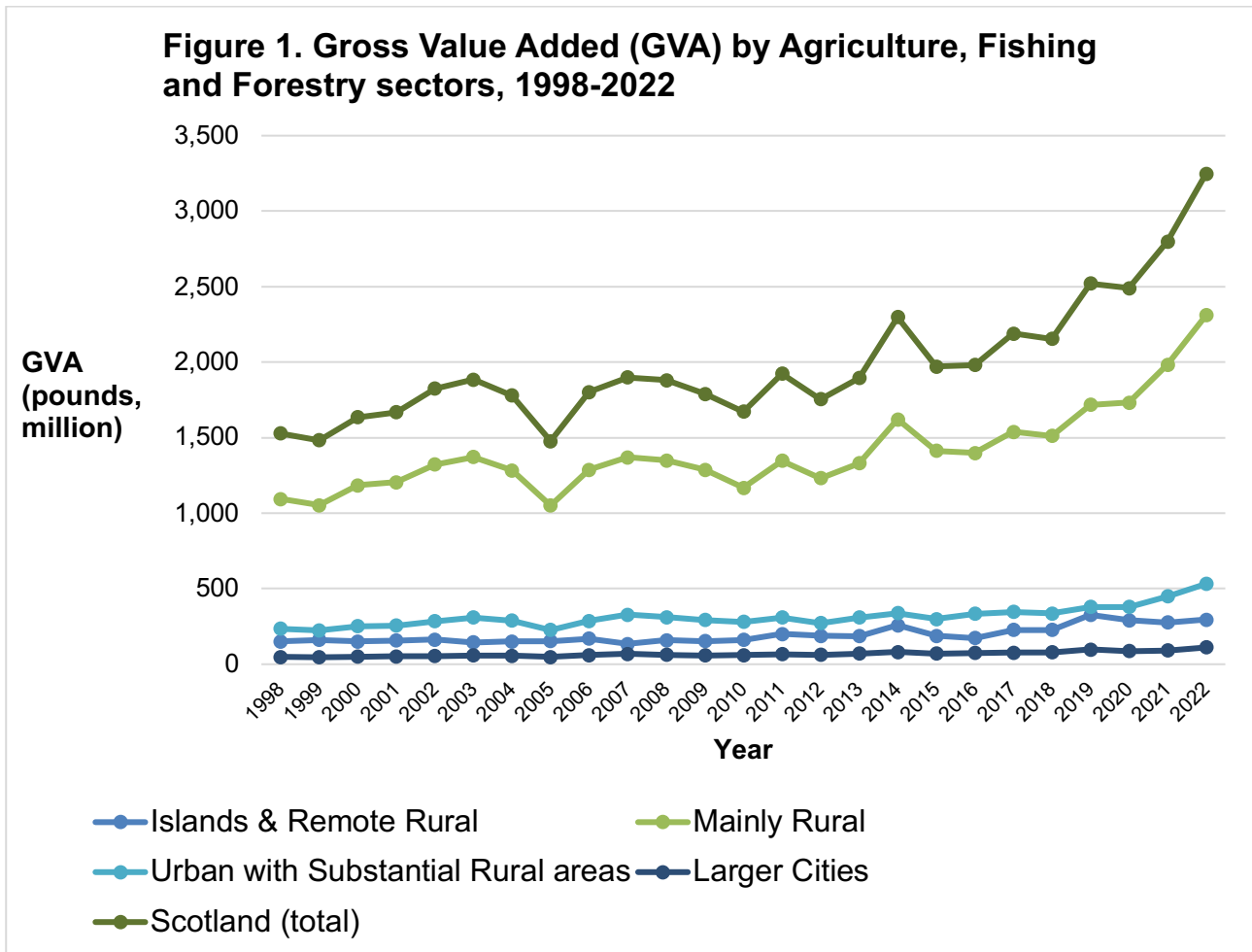
³ The SCQF is the qualifications framework for Scotland. It is used to compare and understand Scotland's wide range of qualifications.

<p>Economy and Digital</p> 	<p>Improving</p> <ul style="list-style-type: none"> • Gross Value Added (GVA) by urban/rural classification • Residential broadband coverage by service type/download speeds • 4G geographic coverage • Percentage of households with home internet access
<p>Health and social care</p> 	<p>Improving</p> <ul style="list-style-type: none"> • Warwick-Edinburgh Mental Well-being Scale (WEMWBS) score • Access to green and blue spaces <p>Maintaining</p> <ul style="list-style-type: none"> • Healthy Life Expectancy for Females <p>Worsening</p> <ul style="list-style-type: none"> • How easy it is for people to contact their General Practice in the way they want • Quality of care experience • Self-assessed general health • Healthy Life Expectancy for Males • Help, care or support received improved or maintained quality of life

<p>Culture</p> 	<p>Improving</p> <ul style="list-style-type: none"> Percentage (%) of the population that can speak Gaelic (Scotland-wide) <p>Maintaining</p> <ul style="list-style-type: none"> Participation in any cultural activity <p>Worsening</p> <ul style="list-style-type: none"> Attendance at cultural events and visiting places of culture
<p>Social Justice</p> 	<p>Improving</p> <ul style="list-style-type: none"> Relative child poverty - Proportion (%) of children people in each category who are living in households that are in relative poverty Residence based median gross annual pay for full-time employees Percentage of households with home internet access <p>Maintaining</p> <ul style="list-style-type: none"> Relative poverty - Proportion (%) of people in each category who are in relative poverty Perceptions of influence over decisions affecting local area <p>Worsening</p> <ul style="list-style-type: none"> How easy or difficult people find it to afford transport costs Levels of fuel poverty and extreme fuel poverty How the household is managing financially <p>Performance data unavailable or not applicable</p> <ul style="list-style-type: none"> Housing costs as a percentage of earnings

1. Agriculture and Marine

Gross Value Added by Agriculture, Fishing and Forestry sectors



The Gross Value Added (GVA) by the agriculture, fishing and forestry sectors for rural local authorities in 2022 was £2,605 million (80% of the Scottish total). GVA was consistently highest over time in mainly rural areas followed by urban with substantial rural areas, islands and remote rural; and lowest in largest cities. GVA by these sectors has grown from 1998-2022, with mainly rural contributions increasing from 1998-2022 by almost £1,000 million.

Using the RESAS classification of local authorities and the 2022 Marine economic statistics, 33% of Scotland’s Marine sector GVA is from local authorities classed as Mainly Rural. However, this data should be treated with caution as it cannot be robustly compared to the rest of Scotland.

Percentage (%) employment by sector, Agriculture, Forestry and Fishing sector

Percentage employment in the Agricultural, Forestry and Fishing sectors was consistently higher in island and remote local authorities compared to other authorities in Scotland between 2016-2023, peaking at 18% in 2021, and averaging 16% across those years. Mainly rural local authorities follow in number rising from 8% in 2015 to 10% in 2022. By comparison urban with substantial rural areas had 2% employment and Larger cities almost 0% employment in these sectors in 2023. On average in Scotland, employment in this sector is steadily maintained at 3%.

Sustainability of Fish Stocks

The estimated percentage of commercial stocks fished at sustainable levels has increased steadily from 23% in 1991 to 69% in 2020. Whilst this is an indicator of the health of an industry that operates in a rural (marine) setting it does not make sense to compare fish stocks sustainability by rurality.

Marine sector: Gross Value Added (GVA), turnover and employment

Gross Value Added (GVA) by the Marine Sector has decreased in Scotland from 2016-2022, from £5,080 million to £4,937 million, with alternating periods of growth and decline. From 2021-2022, mainly rural local authorities saw an increase in marine sector GVA, from £1,338 million to £1,517 million. Larger city local authorities are the highest contributor to Scotland's Marine Gross Value Added (GVA). Island and remote communities and urban with substantial rural areas contribute the least to total Gross Value Added (GVA) figures. These figures should be interpreted with caution. For instance, further consideration to the economic contribution of different regions relative to the size of their populations would be beneficial.

2. Transport

Weekly travel costs in different Minimum Income Standard budgets

For all Minimum Income Standard (MIS) budgets, the remote Scottish Mainland has the highest weekly travel costs when compared to the UK and Scottish islands. Travel costs are increasing across all Minimum Income Standard (MIS) budgets for remote areas (except for island pensioners).

Percentage (%) of population within a 15-minute drive time by public transport to key services (e.g. General Practice)

The percentage of the population within a 15-minute drive time by public transport to a shopping center in 2022 was lowest in accessible rural areas at 22%, followed closely by remote rural areas at 29%. This is significantly lower than the rest of Scotland figure at 81%. For remote rural areas, the percentage figure has increased from 2006-2020, by 9 percentage points, while accessible rural areas have seen a decrease of 1 percentage point in the same time frame.

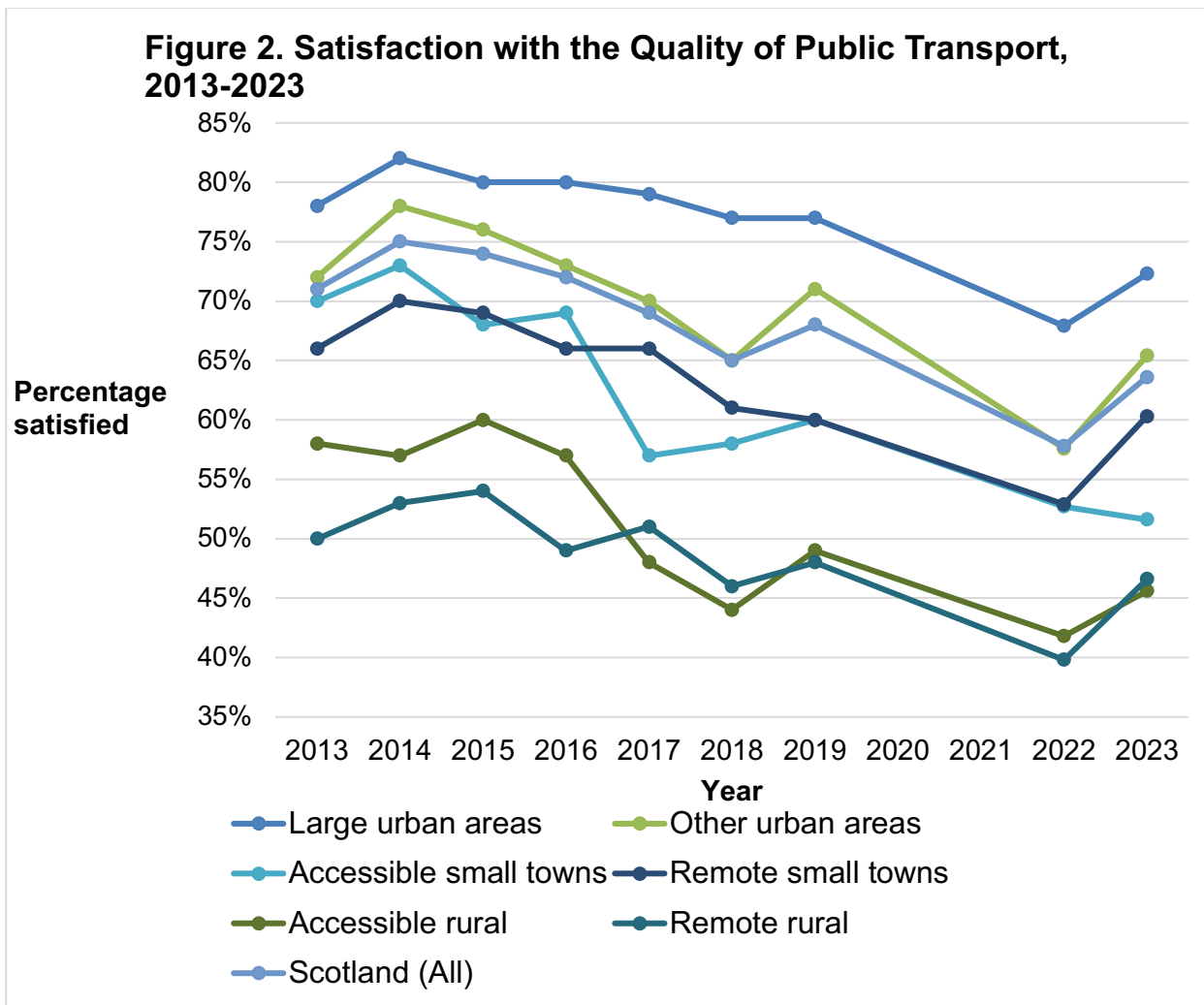
The percentage of the population within a 15-minute drive time by public transport to a post office in 2022 was lowest in remote rural areas at 63%, followed closely by accessible rural areas at 68%. This is significantly lower than the rest of Scotland figure at 96%. For remote rural areas, the percentage figure has maintained from 2006-2020, despite a decrease from 2006-2009, while accessible rural areas have seen a decrease of 10 percentage point in the same time frame.

The percentage of the population within a 15-minute drive time by public transport to a GP in 2022 was lowest in remote rural areas at 40%, followed closely by accessible rural areas at 47%. This is significantly lower than the rest of Scotland figure at 92%. For remote rural areas, the percentage figure has marginally increased from 2006-2020 by 2 percentage points, while accessible rural areas have seen a decrease of 8 percentage point in the same time frame.

How easy or difficult people find it to afford transport costs

People found it easier to afford transport costs across all areas of Scotland in 2023 compared to 2022. The percentage of people who found it easy to afford transport costs across all of Scotland increased from 64% to 70% in this time. There were increases across all rural areas. The greatest change in perceived affordability of transport costs was in remote rural areas (up 27 percentage points) and remote small remote towns (up 19 percentage points).

Satisfaction with the quality of public transport



Satisfaction with public transport is much lower in accessible rural (46%) and remote rural (47%) areas compared to large urban areas (72%). The satisfaction rate had declined in all areas of Scotland between 2013 and 2022. However, in 2023, there was an increase to 64% from the 2022 rate of 58% for Scotland.

3. Housing

Proportion (%) of all dwellings that are second homes

The percentage of dwellings that are second homes has slightly decreased on average across Scotland by 0.5 percentage points from 2007-2023 but has increased by 0.6 percentage points for accessible small towns and 0.3 percentage points for accessible rural areas. Remote rural areas had a consistently significantly higher proportion of second homes compared to other areas in Scotland. In 2022 this figure was 6.4%, compared to 1.9% in remote small towns (the second highest figure) and 0.3% in other urban areas (the lowest figure).

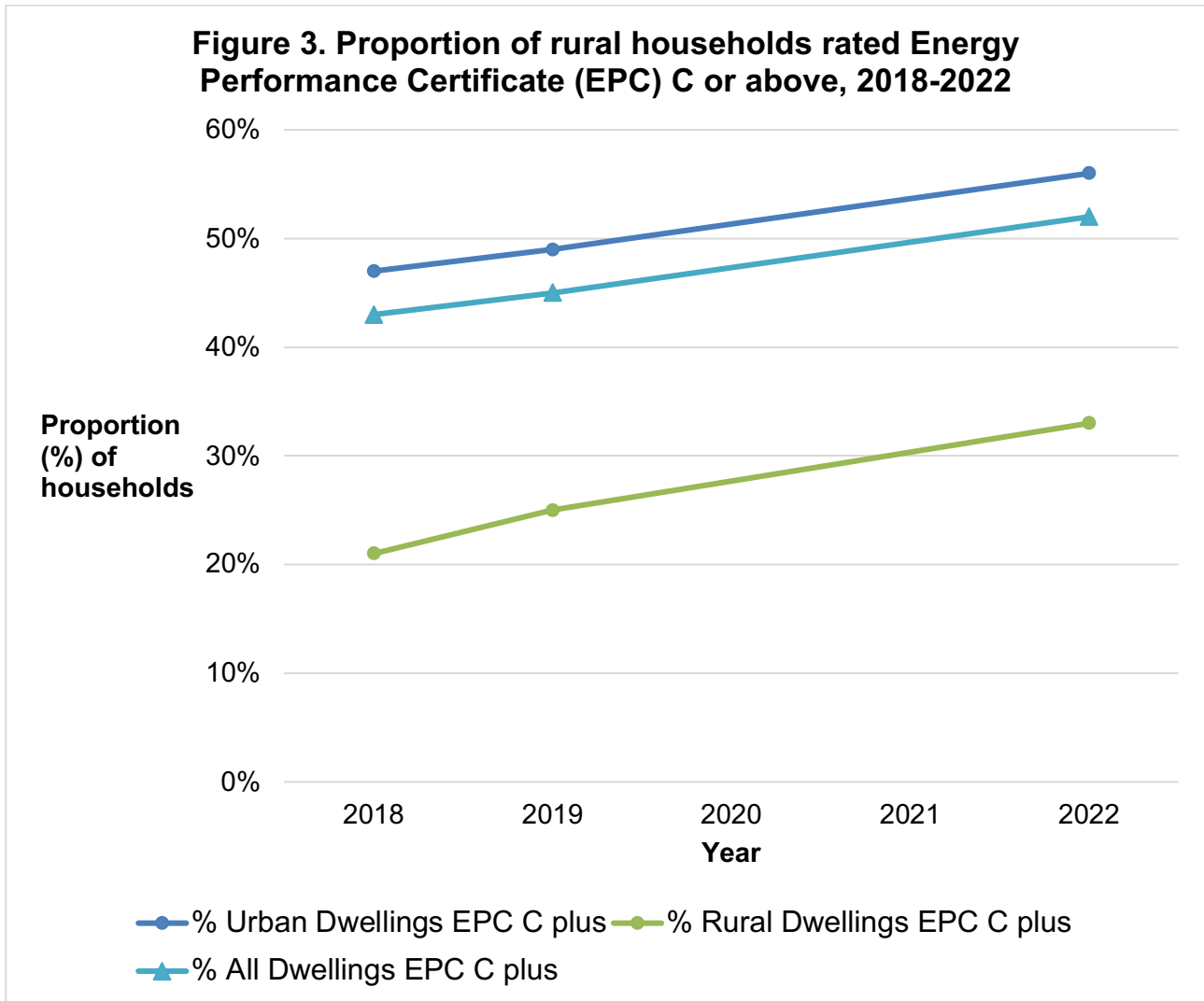
Proportion (%) of all dwellings that are short-term or long-term vacant homes

The percentage of dwellings that are vacant has slightly increased on average across Scotland by 0.6 percentage points from 2007-2023, relatively uniformly across all areas. Remote rural areas had a consistently significantly higher proportion of second homes compared to other areas in Scotland. In 2022 this figure was 5.9%, compared to 4.7% in remote small towns (the second highest figure) and 2.8% in accessible small towns (the lowest figure).

Average residential property price

Average residential property prices are increasing across all areas in Scotland, and are highest in accessible rural areas, followed by remote rural areas.

Energy performance ratings of rural households



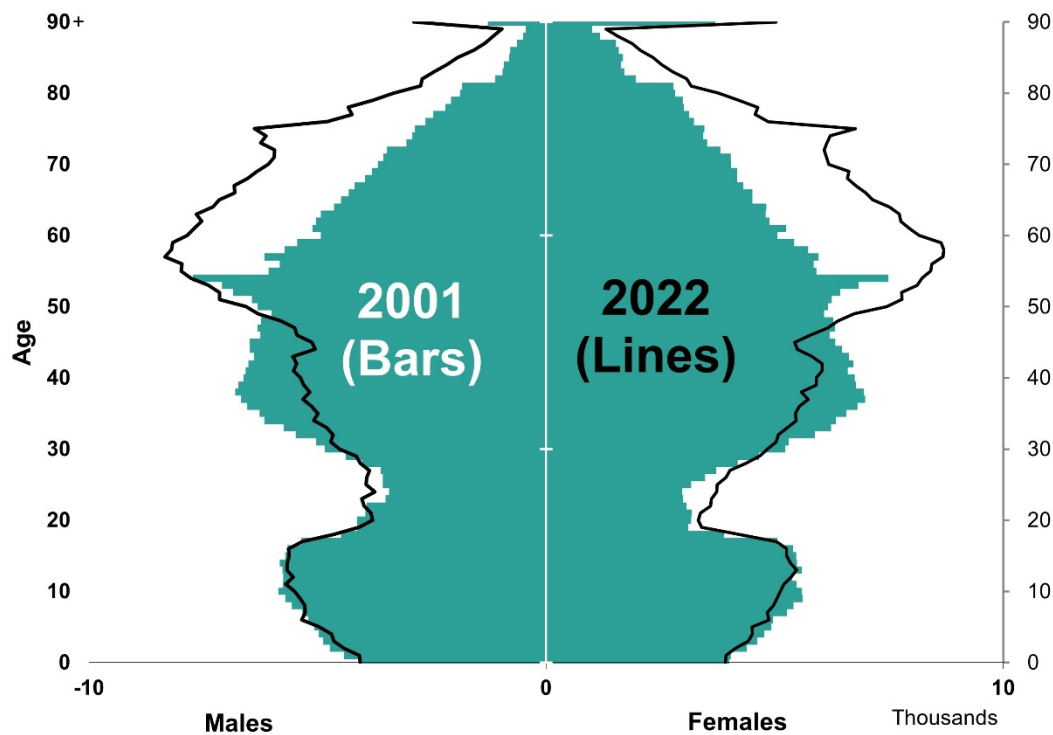
The average energy efficiency profile of rural properties is lower than that for urban properties (56% of household rated Energy Performance Certificate (EPC) C or above in urban areas compared with 33% in rural areas). Across Scotland the average Energy Performance Certificate (EPC) rating of dwellings is increasing. 52% of all properties in 2022 were rated C or better under SAP 2012 (Revised Standard Assessment Procedure (RdSAP) v9.93), compared to 45% in 2019.

Percentage of dwellings with urgent disrepair to critical elements

In 2022, rates of urgent disrepair to one or more critical elements stood at 20% for rural areas, similar to 2019 levels and the 2020 urban rate of 17%.

4. Population and skills

Population Change in Rural Classified Locations 2001-2022⁴



Source: Population and Migration Statistics, National Records of Scotland

The population of both Rural Scotland and Scotland as a whole has grown over the last two decades. In mid-2022 the population of Accessible Rural areas was 19% higher than in 2001 while the population of Remote Rural Areas had increased by 4%. These figures compare to a population increase of 8% across Scotland as a whole. The picture compared to 2011 is slightly different with a small decline in Remote Rural Areas (-1%) between 2011 and 2022 while the population of Accessible Rural areas grew by 11%. Scotland's population grew by 3% over this period.

The population of rural Scotland is ageing as demonstrated by the chart above. Between 2001 and 2022 the number of people aged 65 or over in Accessible Rural areas increased by almost three-quarters (74%) whilst it increased by more than half (53%) in Remote Rural Areas. Compared to 2011 the population of Accessible Rural areas increased by 37% whilst the population of Remote Rural areas grew by 26%. These increases were greater than those across Scotland as a whole.

⁴ The information is based on National Records of Scotland mid-year population estimates. The 2011 figures may change slightly after estimates are rebased in light of the 2022 census results.

Population by age

The median age across rural Scotland maintained from 2020 to 2021. The median age for accessible rural areas is 47 (behind only remote small town areas and remote rural areas), while the median age for remote rural areas is 51 (the highest for all areas in Scotland).

Population growth, 2001-2022

Population numbers increased marginally across most areas in Scotland from 2001-2022 with the exception being Remote small towns where the population has fallen slightly. As of 2022⁵, remote small towns have the smallest population at 142,153, followed by remote rural areas at 294,798, then accessible small towns at 466,708, accessible rural at 664,114, other urban areas at 1,836,877 and finally large urban areas with the highest count at 2,042,350. The population of rural areas makes up around 18% of Scotland's total population.

Projected percentage change in population⁶

The most recent sub-national population projections, which are based on data up to 2018, suggest that the population of 'Islands & Remote Rural' council areas and of 'Mainly Rural' council areas will decrease between 2022 and 2032 while the populations of more urban areas are expected to increase over the same period. More up-to-date population projections, reflecting the latest data on migration, mortality and fertility, will be published later in 2025.

Working age employment rate (residence based)

Working age employment rate has remained relatively steady across from 2004-2023, with rural areas seeing a slight decline (by 3 percentage points in island and remote rural local authorities and by 1 percentage point in mainly rural local authorities). In 2023, all areas in Scotland have converged to an identical working age employment rate of 75%.

Annual Participation Measure

The percentage of 16-19 year olds participating in education has decreased slightly in rural areas in Scotland from 2016-2024 (from 73.4% to 70.8% in accessible rural

⁵ The 2022 figures are not comparable to those for 2011-2021 (but can be compared with 2001-2010). This is because the 2011-2021 estimates will be revised following the 2022 Census.

⁶ Please note that there is a caveat around the projections as they cover different geographies and are now out-of-date.

areas and (71.5% to 66.7% in remote rural areas). Accessible rural areas however have the second largest percentage of 16-19 year olds participating in education, behind only large urban areas at 74.7%.

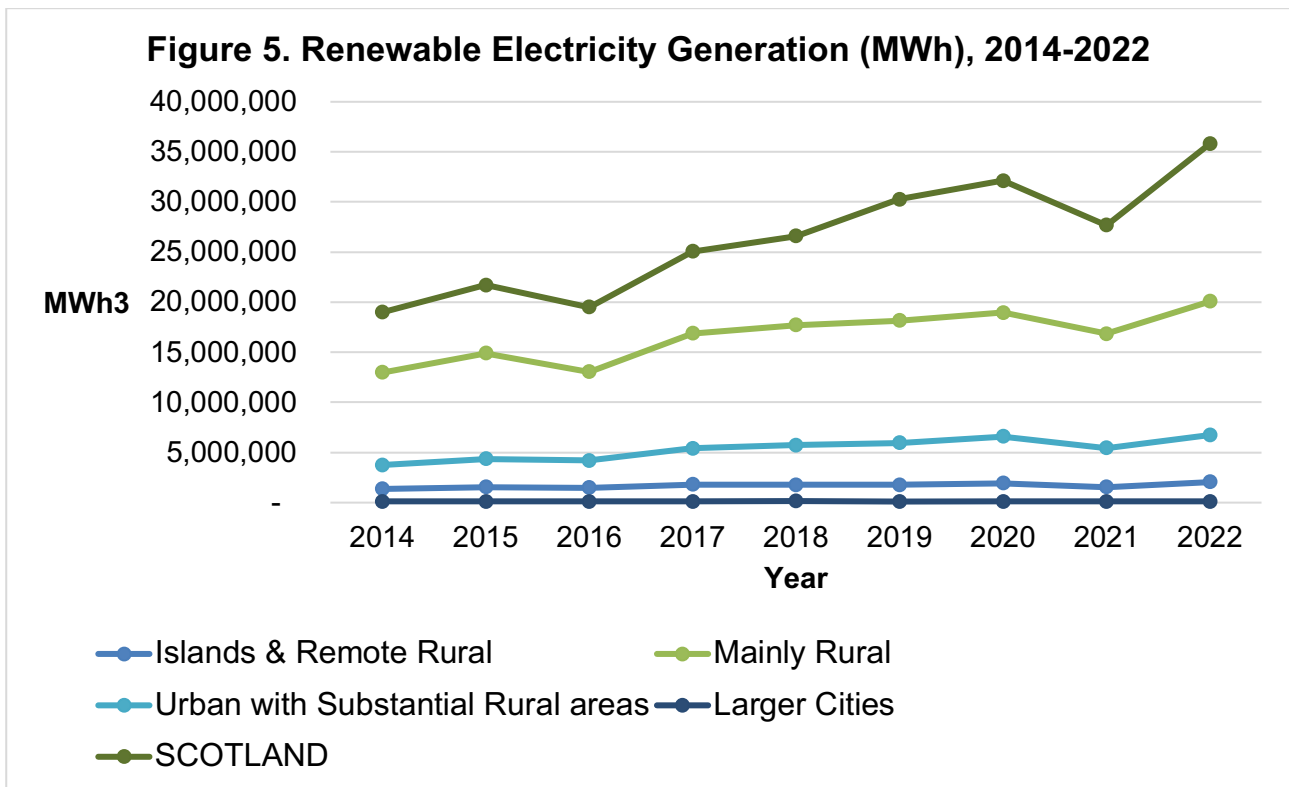
On the other hand, the percentage of 16-19 year olds participating in employment has increased in all areas in Scotland from 2016-2024 (from 18.2% to 21.6% in accessible rural areas and (21.7% to 26.9% in remote rural areas). Remote rural areas have the second largest percentage of 16-19 year olds participating in employment, behind only remote small towns at 27.3%.

5. Environment and climate change

Percentage (%) of household waste recycled

The percentage (%) of household waste recycled in Islands & Remote Rural areas in 2022 was behind the national average at 34.9% compared to 43.3% but was ahead of Larger Cities (33.5%). However, between 2014-2022 the increase in the percentage (%) of household waste recycled in Islands & Remote Rural local authorities was the highest of all areas in Scotland, with a 10.3 percentage points difference from 24.7% to 34.9%. Mainly Rural areas follow with a 2.8 percentage point difference. These are much greater increases in recycling rates than the Scottish average of 0.5 percentage points.

Renewable Electricity Generation



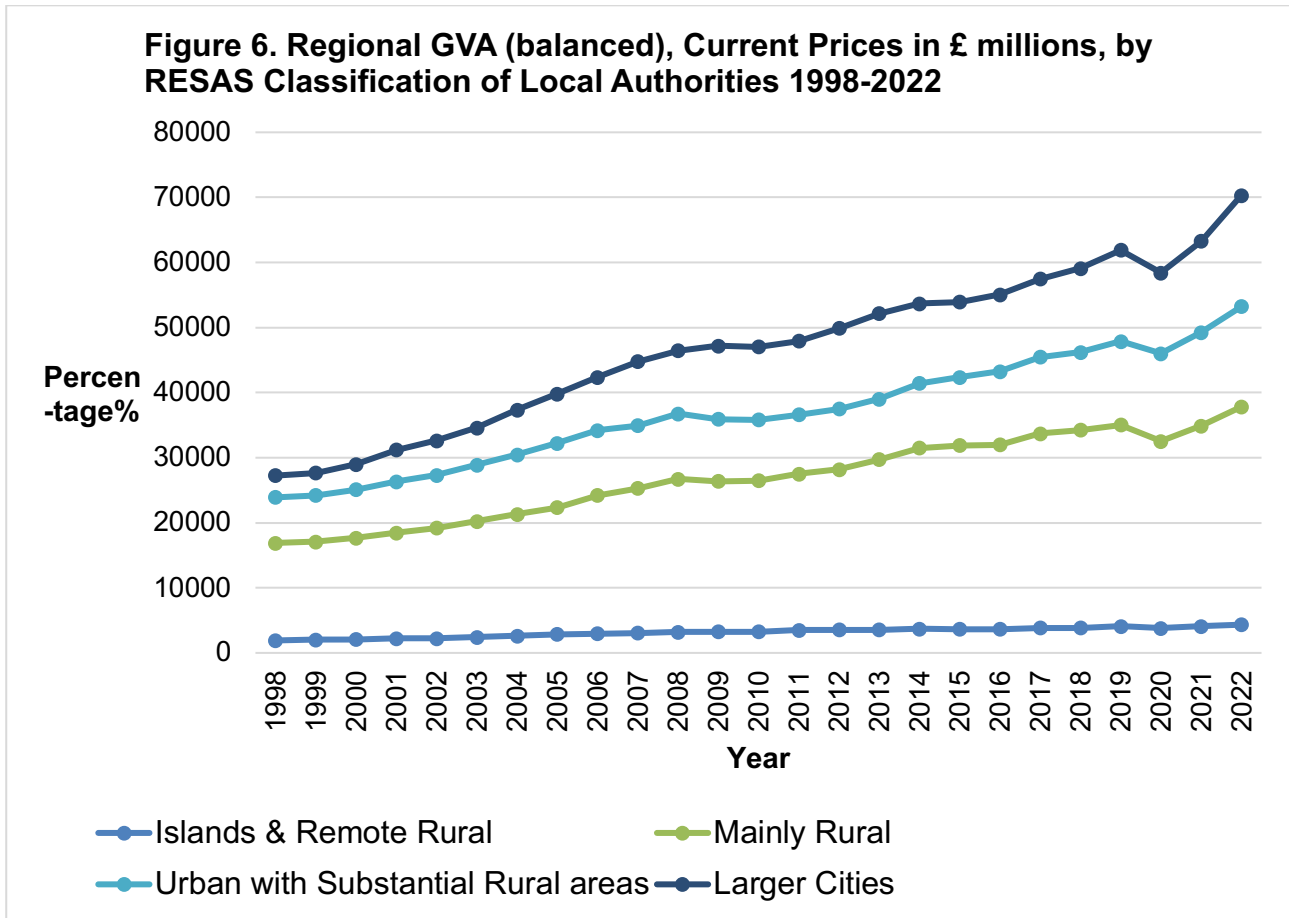
Electricity generation is greatest in mainly rural areas (56% of the Scottish total) and is increasing at the highest rate. An increase from almost 13 million Mega-watt hour³ to over 20 million mega-watt hour³ since 2014.

Clean Seas

The percentage of biographic regions with acceptably low levels of contaminants to meet environmental health thresholds increased from 75% to 79% between 2016 and 2017 and has remained steady since up to 2020. Data beyond 2020 is not yet available.

6. Economy and Digital⁷

Regional Gross Value Added (GVA) by urban / rural classification



Islands and Remote and Mainly Rural areas of Scotland accounted for £42 billion, or 25% of the Scottish GVA in 2022 with only 3% of this produced in Island and Remote Rural areas. GVA was highest in Larger Cities (42%) in 2022 followed by Urban with Substantial Rural Areas (32%).

In the past ten years, between 2012 and 2022, GVA has increased at a slower rate in Islands and Remote areas (23%) than it did elsewhere in Scotland (the national growth rate was 39%). GVA fell across Scotland in 2019-2020 following EU-exit and the Covid-19 pandemic and then recovered. The rate of growth in GVA between 2021-22 continued to be lowest in Islands and Remote Rural areas (6%)

⁷ The Scottish Government's [Wellbeing Economy Monitor](#) sets out a number of indicators that are also relevant to Scottish Government objectives for the rural economy, from active travel to child poverty, community ownership and young people's participation. However, not all of these data sources currently provide a breakdown by Urban-Rural classification.

and highest in Larger cities (11%) whilst the rate of growth in Mainly rural and Urban with substantial rural was the same (8%).

Residential fixed broadband coverage by service type/download speeds

There is a gap between urban and rural provision of fixed broadband, but that gap is narrowing. Almost all homes in Scotland can get some fixed broadband access, and the percentage of quality broadband access is increasing over time. However, the speed and quality, in particular the incidence of newer services like gigabit capable broadband, is consistently lower in rural areas. In 2024 the percentage of residencies with fixed superfast broadband access in urban areas was 99% compared to 83% in rural areas, while the percentage of residencies with access to gigabit capable broadband had an even greater difference, with 85% in urban areas and 43% in rural areas. Importantly there is a higher rate of improvement in broadband quality across time in rural areas.

4G geographic coverage

The percentage of 4G geographic coverage by at least one Mobile Network Operator is lower in rural areas than urban areas as of 2024 (89% compared to 100%). However, this gap is narrowing – rural coverage increased from 84% in 2023, to 89% in 2024. Mobile voice services from all four Mobile Network Operators are now available across 69% of Scotland's geography, compared to 61% in 2023. This reflects an increase of eight percentage points, to 68%, in rural coverage, while urban coverage remains at 99%.

Percentage of households with home internet access in 2023

The proportion of households in Scotland with home internet (i.e. those who take up a service) remained at a record high of 91 per cent in 2023, with no significant difference between households in urban and rural areas.

7. Health and social care

Waiting time to see or speak to a doctor or nurse from a General Practice

As of 2023-24, 91% of people find it easy to contact their GP in remote rural areas and 80% of people find it easy to contact their GP in accessible rural areas. This is significantly higher than the average for Scotland (76%). However, these figures have decreased from 95% and 90% respectively since 2017-18. This decline is evident across all areas in Scotland.

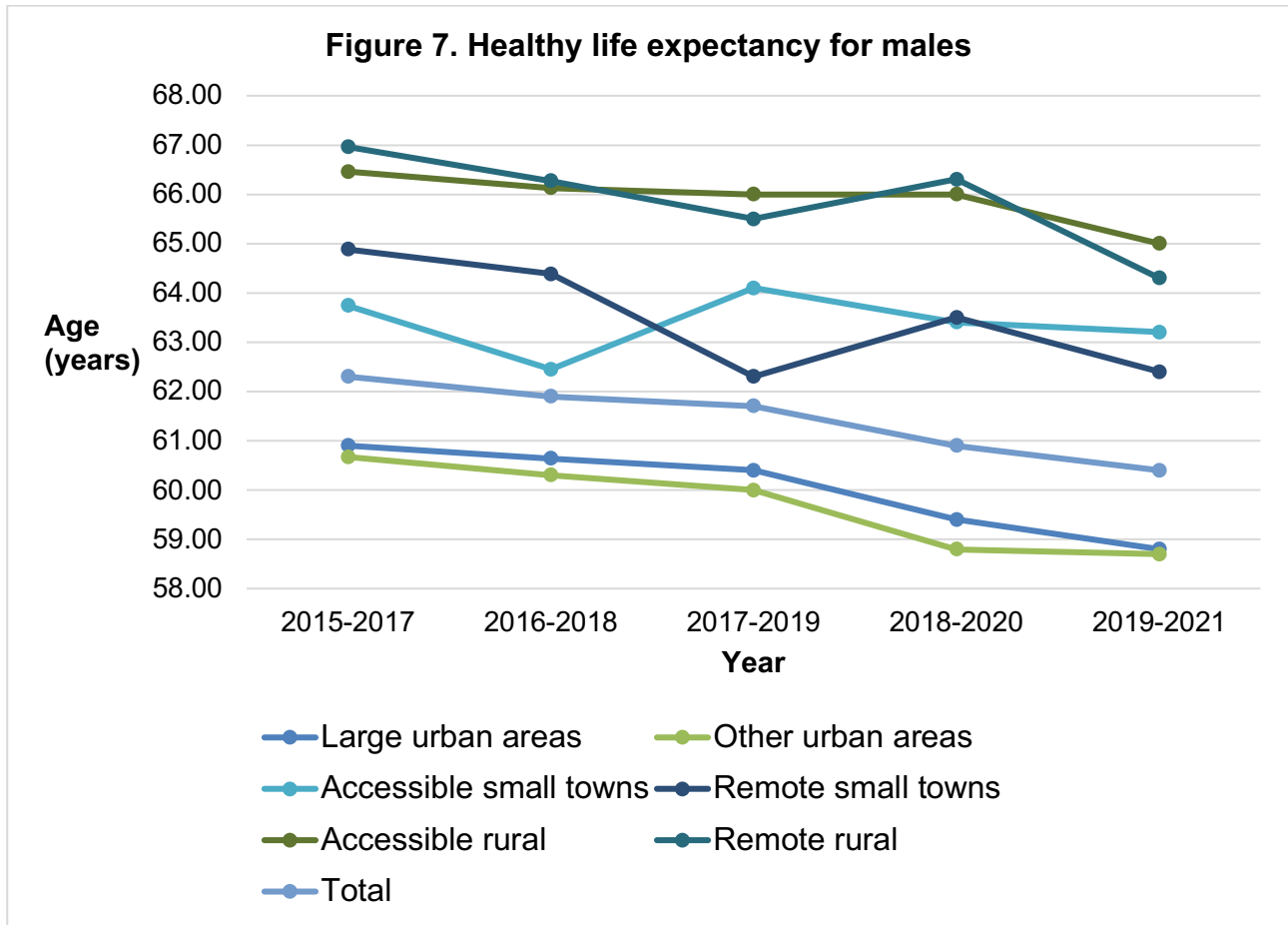
Quality of care experience

As of 2023-24, 81% of people had a positive quality of care experience in remote rural areas and 71% of people had a positive quality of care experience in accessible rural areas. This is significantly higher than the average for Scotland (69%). However, these figures have decreased from 88% and 85% respectively since 2017-18. This decline is evident across all areas in Scotland.

Self-assessed general health

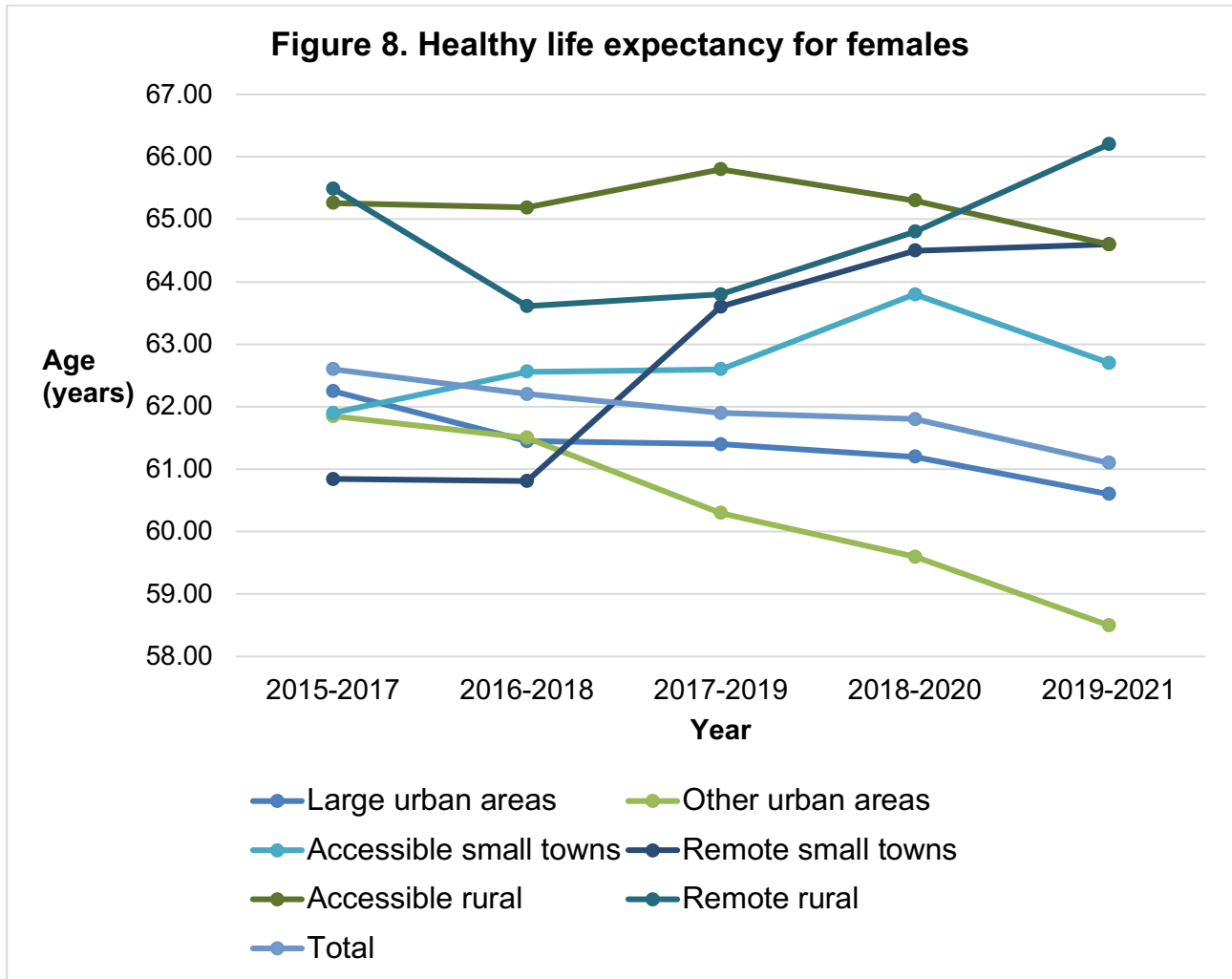
From 2012, self-assessed general health has declined across rural areas in Scotland.

Healthy Life Expectancy for males



Healthy life expectancy is higher in rural Scotland. It is highest in accessible rural areas for males, at around 63.2 years for males in 2019-21, which is almost 7 years higher than other urban areas. From 2018-2020 to 2019-2021 there has been a slight decrease in healthy life expectancy across all areas in Scotland.

Healthy Life Expectancy for females



Healthy life expectancy is highest in remote rural areas for females in 2019-21, at around 66.20 years which is almost 8 years higher than for females in other urban areas. Females in remote rural areas appear to diverge from the general Scottish trend which is a slow and slight decrease in healthy life expectancy for females.

These findings coincide and support other findings for rural areas: general better satisfaction with GPs, self-assessed general health, quality of care and mental wellbeing in rural areas. This may suggest greater overall health and social care in rural areas, but quality of living and differences in physical activity cannot be excluded.

Help, care or support received improved or maintained quality of life

As of 2023-24, 66% of people had a positive response, when asked if help, care or support received had improved or maintained their quality of life, in remote rural areas and 60% of people had a positive response in accessible rural areas. This is

marginally higher, though there is little difference, than the average for Scotland (61%). However, these figures have decreased from 82% and 81% respectively since 2017-18. This decline is evident across all areas in Scotland.

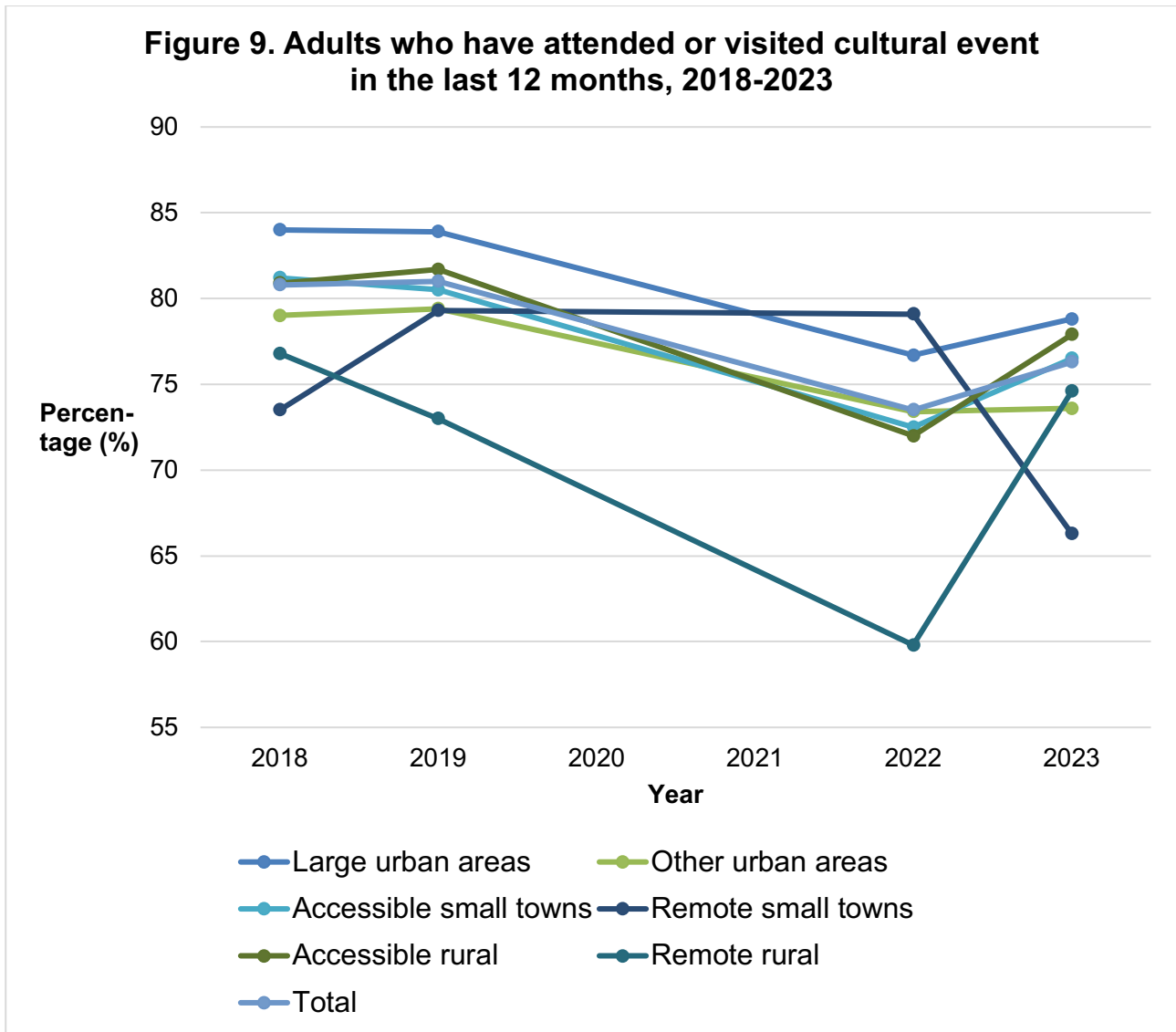
Warwick-Edinburgh Mental Well-being Scale (WEMWBS) score⁸

Mental Well-being decreased across all areas in Scotland between 2017 and 2022 but remained highest in rural areas. Between 2022 and 2023 average well-being levels improved slightly in both urban and rural areas.

⁸ The March 2024 publication does not include variables on 'mental wellbeing' as further analysis is required – it can be used as an indicator but will need to wait longer for data.

8. Culture

Attendance at cultural events and visiting places of culture



Between 2018 and 2022 there was a gradual decline across all areas in Scotland in the percentage of adults who had attended or visited a cultural event in the last 12 months, from 81% to 74%.⁹ The influence of the Coronavirus (COVID-19) pandemic and cost of living crisis may have had an impact on declining attendance rates during this period. However, in 2023 rates of attendance increased slightly from 74% to 76% across all areas of Scotland.

⁹ In 2018 and 2019 the wording of the response options differed slightly to 2022. For a full list of the options for attendance and data entries for each year see the Scottish Household Survey data explorer: [SHS Data Explorer](#)

When examining attendance by a 2-fold urban/rural split,¹⁰ adults living in the rest of Scotland were more likely to attend a number of individual cultural events or places than adults who were in rural Scotland. For example, in 2022 the biggest differences were for:

- Cinema (52% compared to 40%),
- Museum (27% compared to 21%)
- Art gallery (19% compared to 15%)

A qualitative report (2024) ([Cultural engagement in Scotland: what is it and why does it matter?](#)) on people's experiences with cultural engagement, across different geographical areas (including rural and island areas) in Scotland explores people's perceptions on topics relating to local provision, transport and access.

When examining by 6-fold urban/rural categorisation¹¹, between 2018 and 2022 there was a gradual decline across all areas in Scotland in the percentage of adults who had attended or visited a cultural event in the last 12 months with the exception of remote small towns, where there has been no significant change.

There has been a significant increase in attendance from 2022 to 2023 in Accessible Rural and Remote Rural areas. There has been no significant change in Large urban areas, Other Urban Areas or Accessible small towns. Attendance in Remote Small Towns has significantly decreased 13 percentage points from 79% to 66%.

Participation in any cultural activity

In 2023, 74% of adults across all of Scotland had participated in a cultural activity. When examining participation by 2-fold urban/rural split,¹² cultural participation in 2023 was higher amongst adults living in rural Scotland compared to those living in the rest of Scotland (79% compared to 73%).

When examining by 6-fold urban/rural categorisation,¹³ the percentage of adults who have participated in a cultural activity in the last 12 months showed a significant decrease in Other Urban Areas and Remote Small Towns. There has

¹⁰ See [Cultural engagement in Scotland: what is it and why does it matter? - gov.scot](#)

¹¹ See the [SHS Data Explorer](#)

¹² See [Cultural engagement in Scotland \(2023\). Findings from the Scottish Household Survey \(2023\)](#). page 40

¹³ See the [SHS Data Explorer](#)

been a significant increase in participation in Remote Rural areas of 6 percentage points from 72% to 78%. There has been no significant change in Large Urban, Accessible Small Towns or Accessible Rural.

Percentage (%) of the population that can speak Gaelic¹⁴

In 2022, 10% of the population in local authority areas classed as Islands and Remote Rural were Gaelic speakers compared to 2% in Mainly Rural and 1% in both Urban with Substantial Rural and Larger City local authorities. Actual numbers of Gaelic speakers have increased from 2001-2022 in all local authority classifications, except for Islands and Remote Rural where they dropped from 20,145 in 2001 to 14,841 in 2022.

¹⁴ [Languages | Scotland's Census \(scotlandscensus.gov.uk\)](https://www.scotlandscensus.gov.uk/languages)

9. Social justice

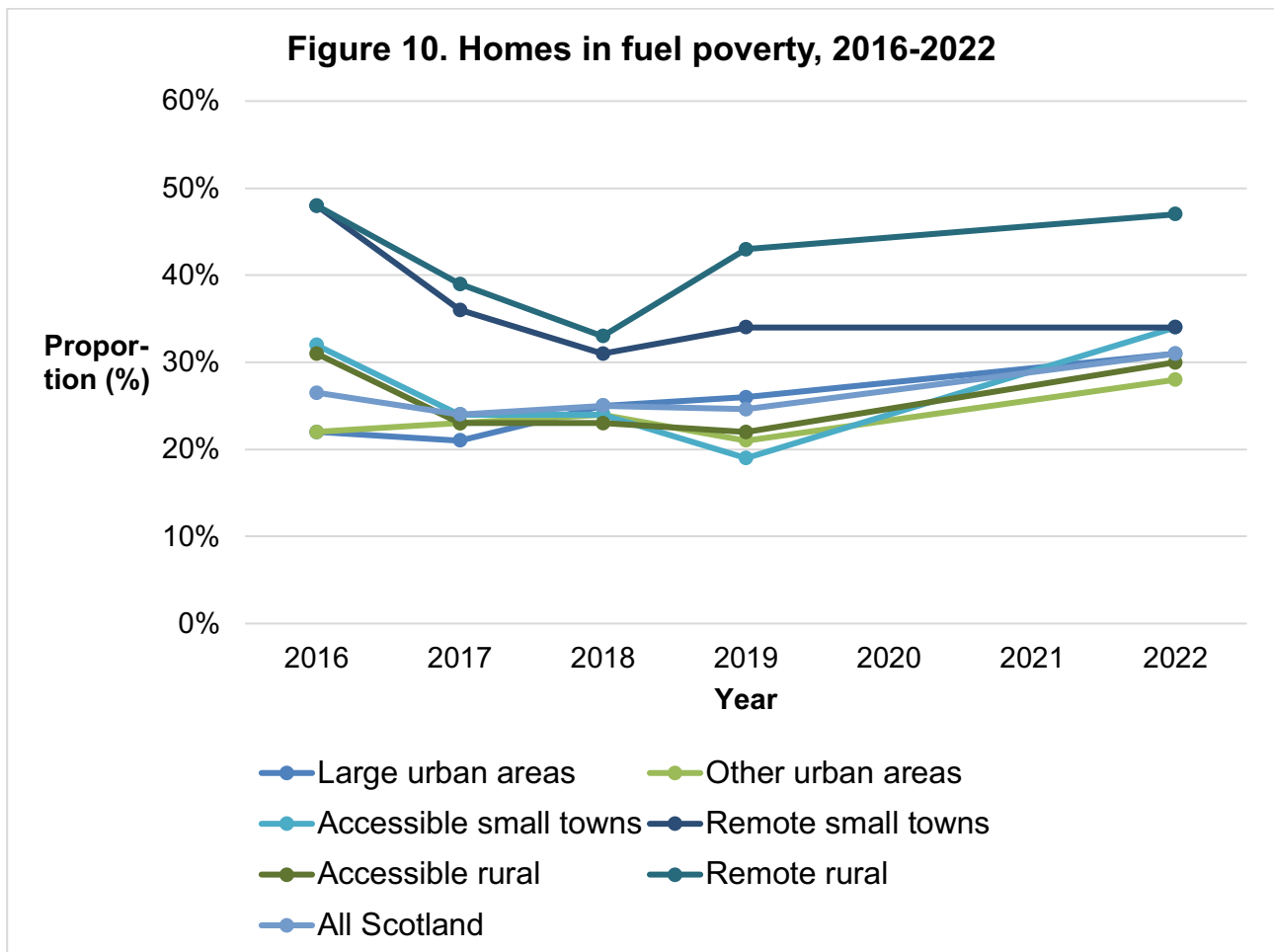
Proportion (%) of people in each category who are in relative poverty (below 60% of UK median income after housing costs)

Overall poverty and child poverty rates have been lower in rural areas in Scotland compared to urban areas since 2006-09. Poverty rates in rural areas have been relatively stable over this period. It is hard to interpret trends from 2018-21 with certainty as surveying adequate numbers of households was not possible during the pandemic.

Residence based median gross annual pay for full-time employees

The residence based median gross annual pay for full-time employees has been consistently higher in accessible rural areas than the rest of Scotland from 2007-2020. In 2020 these figures were £34,311 for accessible rural areas and £31,531 for the rest of Scotland. However remote rural areas fall behind at £29,652 as of 2020. Nonetheless across all areas, these figures are increasing.

Levels of fuel poverty and extreme fuel poverty



Fuel poverty is higher in rural areas. In 2022, an estimated 35% of households were fuel poor in rural areas. This is higher than the estimates for all Scottish households at 31%, and for urban households at 30%. Additionally, the rate of fuel poverty for remote rural households (47%) is higher than for all other areas.

Perceptions of influence over decisions affecting local area

In 2022, 21% of people in rural areas felt they had influence over decisions affecting their local area compared to 17% in urban areas.

References

[2023-24 Programme for Government](#)

[Equality, opportunity, community: New leadership - A fresh start](#)

[Cultural engagement in Scotland: What is it and why does it matter?](#)

[National Performance Framework](#)

[Rural Scotland Data Dashboard](#)

[Scottish Household Survey Data Explorer](#)

[Scottish Islands Data Dashboard](#)

[Scottish Islands: Data Overview 2023](#)

Appendix: Data Sources

Data Source	Hyperlink	Data Release frequency	Latest Data Available	Next Publication
Annual Participation Measure: Skills Development Scotland	Annual Participation Measure	Annual	2024	August 2025
Annual Population Survey: Office of National Statistics	Annual Population Survey	Annual (on-going resulting in quarterly updates)	April 2023-March 2024	2024
Annual Survey of Hours and Earnings: Office of National Statistics	Annual Survey of Hours and Earnings	Annual	2024	2025
Business Register and Employment Survey	Business Register and Employment Survey	Annual	2023	To be announced
Employer Skills Survey (2022)	Employer Skills Survey 2022	Every 2 years	2022	2025
Family Resources Survey	Family Resources Survey	Annual	2022-2023	March 2025
Health and Care Experience Survey	Health and Care Experience Survey	Every 2 years	2023-2024	To be announced (expected 2026)

Data Source	Hyperlink	Data Release frequency	Latest Data Available	Next Publication
Healthy Life Expectancy in Scotland: National Records of Scotland	Healthy Life Expectancy in Scotland	Annual	2019-2021	
Household estimates: National Records of Scotland (NRS)	Household estimates	Annual	2023	June 2025
Housing statistics	Housing statistics	Quarterly	2023 (calendar year)	September 2024
International Council for the Exploration of the Sea (ICES) assessments of annual fishing mortality	statistics.gov.scot open data platform.	Annual	2020	2025
Marine and Terrestrial Species Variables: NatureScot	Marine and Terrestrial Species Variables: NatureScot	Annual	2019	To be announced
Mid-Year Small Area Population Estimates National Records of Scotland (NRS)	Mid-2023 population estimates - National Records of Scotland (NRS)	Annual	2023	2025
Modern Apprenticeship Statistics: Skills Development Scotland	Modern Apprenticeship statistics	Annual	2023-2024	May 2025

Data Source	Hyperlink	Data Release frequency	Latest Data Available	Next Publication
Ofcom Connected Nations reports	Ofcom Connected Nations reports	Annual	2024	December 2025
Population Projections for Scottish Areas National Records of Scotland (NRS)	Population Projection for Scottish Areas	Every 2-5 years	2018/2020	2025
Property market report: Registers of Scotland: House Price data	Property market report	Annual	2023-2024	June 2025
Public Health Scotland, Early Child Development:	Early Child Development: Public Health Scotland	Annual	2022/2023	April 2025
Regional Gross Value Added (balanced) by industry: all International Territorial Level regions (ITL) regions: Office for National Statistics	Regional gross value added (balanced) by industry: all ITL regions	Annual	April 2024	2025
Regional Gross Value Added (GVA) (balanced) by industry A and BDE: RESAS classification for the rural economy, 1998 to 2022: Office for National Statistics	Regional gross value added (balanced) by industry A and BDE	Annual	May 2024	2025
Regional Renewable Statistics	Regional Renewable Statistics	Annual	2022	September 2024

Data Source	Hyperlink	Data Release frequency	Latest Data Available	Next Publication
Scotland's Marine Economic Statistics	Marine Economic Statistics	Annual	2022	2025
Scottish Census	Scotland's census	Every 10 years	2022	2031/2032
Scottish Health Survey	Scottish Health Survey - gov.scot	Annual	2023	2025
Scottish House Condition Survey	Scottish House Condition Survey	Annual	2022	2025
Scottish Household Survey	Scottish Household Survey	Annual	2023	2025
Scottish Household Survey (Transport and Travel in Scotland)	Scottish Household Survey (Travel and Transport in Scotland)	Annual	2023	2025
Scottish Household waste data	Household waste data	Annual	2023	October 2025
Scottish Index of Multiple Deprivation	Scottish Index of Multiple Deprivation	Every 4 years	2020	TBC
Scottish Surveys Core Questions	Scottish Surveys Core Questions	Annual	2022	2025

Data Source	Hyperlink	Data Release frequency	Latest Data Available	Next Publication
The Cost of Remoteness	The Cost of Remoteness	Annual	2022	TBC
UK small area gross value added (GVA) estimates: Office for National Statistics	UK small area gross value added (GVA) estimates	Annual	2024	2025

How to access background or source data

The data collected for this social research publication:

are available from published data sources. Links are given in publication.



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Edinburgh
EH1 3DG

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