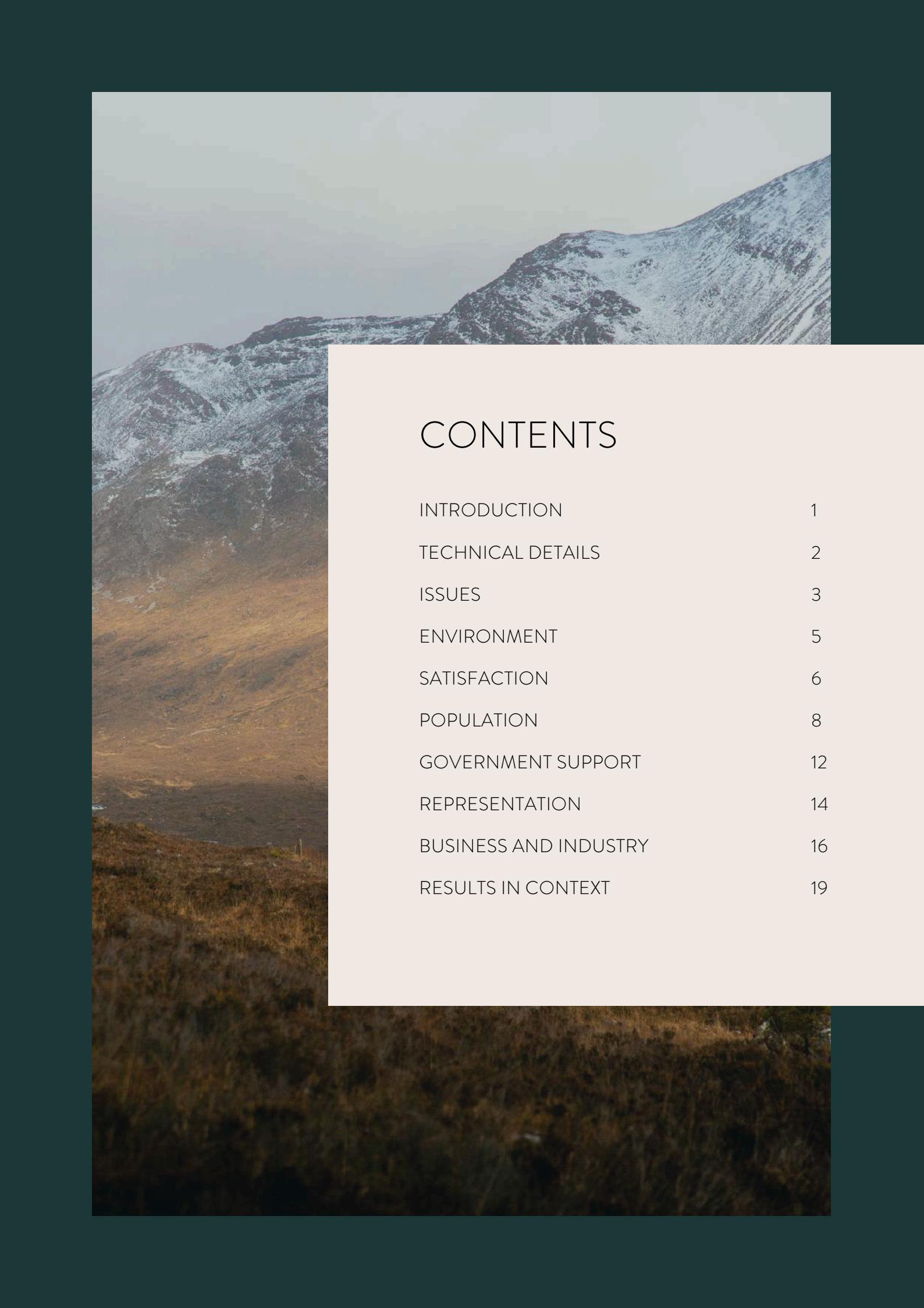




SCOTLAND'S RURAL VOICE

 **Diffley**
Partnership
DECEMBER 2025



CONTENTS

INTRODUCTION	1
TECHNICAL DETAILS	2
ISSUES	3
ENVIRONMENT	5
SATISFACTION	6
POPULATION	8
GOVERNMENT SUPPORT	12
REPRESENTATION	14
BUSINESS AND INDUSTRY	16
RESULTS IN CONTEXT	19

INTRODUCTION

DECEMBER 2025

According to the latest estimates from the [National Records of Scotland](#), Scotland's population has reached a high of 5.55 million people as of mid-2024, up a small 0.7% from the year before. Yet, urban areas surrounding Glasgow and Edinburgh have witnessed most of this growth, while many rural areas have seen real-time population decline.

Alongside issues of depopulation, Scotland is facing a rapidly ageing population. A growing percentage of the country, one in five (21%), are 65 or over; in the last two decades, the number of people aged 65 or more has increased by a staggering 38%, while the working age and youth populations have increased by small margins or even declined. Scotland's rural areas are at the heart of this crisis, with some of the highest percentages of people aged 65 and over in the country.

The impacts of these demographic crises will strain public services and infrastructure throughout Scotland, but particularly in vulnerable rural communities.

It has never been more important to know how rural residents perceive their communities and resources, and what can be done to preserve them in years to come. Scotland's Rural Voice, a new survey, provides a timely snapshot of opinions amongst 2,000 rural residents from across Scotland, examining the issues that matter most to those living in remote and rural areas. To ensure robustness, 1,000 urban residents were also surveyed, enabling comparisons on issues and priorities by area.

Rural residents outline a variety of issues affecting their communities, including access to health services, quality of public transport, availability of housing and more. Many are dissatisfied with their local economy and see the lack of job opportunities as a key driver of out-migration.

Despite these challenges, rural residents are disillusioned with the political establishment - most do not believe that people living in Scotland's rural communities have a meaningful voice in shaping decisions that affect them, or that decision-makers understand the needs of their communities.

However, in the face of these challenges, rural residents highlight important measures to shore up their communities, calling for more investment in critical infrastructure such as housing, public transport and internet in Scotland's rural areas.



SCOTLAND'S RURAL VOICE TECHNICAL DETAILS

The survey was designed by Diffley Partnership, in collaboration with Salmon Scotland, NFU Scotland and Homes for Scotland.

Invitations to complete the survey were issued online using the ScotPulse panel. Fieldwork was conducted between the 18th - 22nd July 2025, and received 2,102 responses from rural residents and 1,133 responses from urban residents, aged 16+, across Scotland. Rural and urban categories have been calculated using the [Scottish Government Urban Rural Classification, six-fold](#).

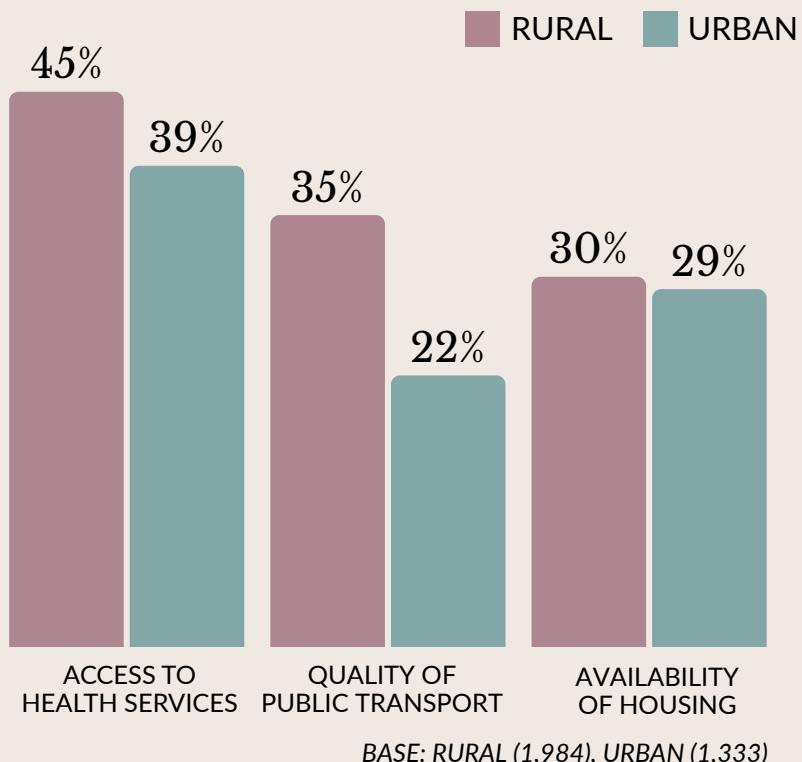
Results are weighted to the Scottish mid-year population estimates (2023) of rural and urban areas, respectively, by age and gender.





IMPORTANT ISSUES

Proportion of respondents citing each matter as one of the top three issues facing their community



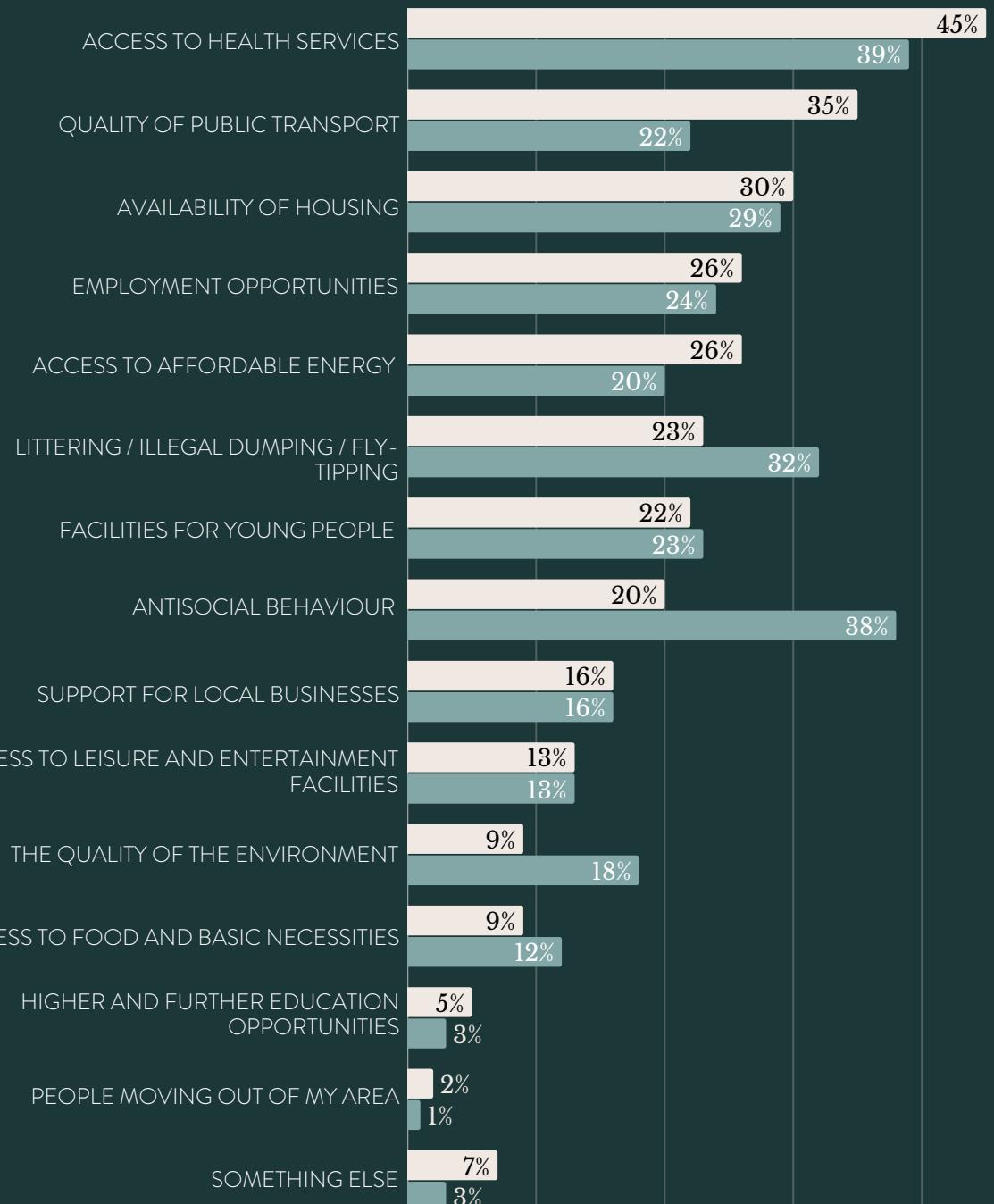
Thinking about the three most important issues facing their local community today, nearly half (45%) of rural residents select access to health services, making it the most frequently reported issue. Just over one in three (35%) prioritise quality of public transport, while three in ten (30%) emphasise the availability of housing as a critical issue. A range of other issues are common amongst the rural public, with 15% or more emphasising employment opportunities (26%), access to affordable energy (26%), littering/fly-tipping (23%), facilities for young people (22%), antisocial behaviour (20%) and support for local businesses (16%).

Top priorities for their community are similar between rural and urban cohorts, although rural residents are more likely to report health services and public transport as top issues. However, among those from rural areas, women are more likely than men to cite quality of public transport (39%; 31%), the availability of housing (35%; 24%) and facilities for young people (26%; 17%) as top priorities. In addition, the youngest age group, those 16-34, are more likely than all other age categories (35+) to select higher and further education opportunities as a top issue (17%; 3%).

IMPORTANT ISSUES

Proportion of respondents citing each matter as one of the top three issues facing their community

 RURAL  URBAN



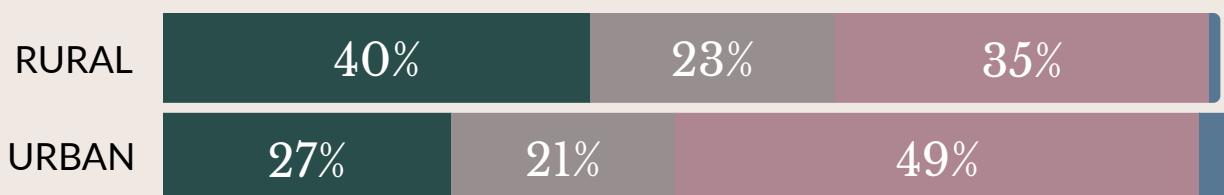
What do you think are the three most important issues facing your local community today? (Please select up to three)
BASE: RURAL (1,984), URBAN (1,333)

ENVIRONMENT

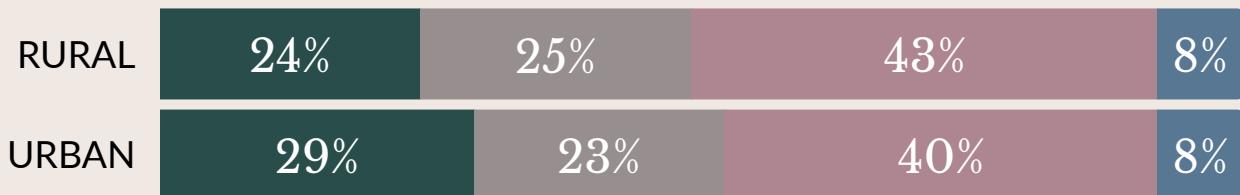
Proportion of respondents that agree/disagree with each statement about their local area

■ AGREE ■ NEITHER / NOR ■ DISAGREE ■ DK

THE ENVIRONMENT IS VALUED AND TAKEN CARE OF



THERE IS SUFFICIENT INFRASTRUCTURE TO HELP ME LIVE SUSTAINABLY



Thinking about the local environment, two in five (40%) rural residents agree (either “somewhat agree” or “strongly agree”) that it is valued and taken care of. However, a similar proportion (35%) of rural Scots disagree with this statement. Despite mixed opinions, rural residents are considerably more likely than their urban peers to think the environment in their local area is valued and taken care of, as only one in four (27%) urban residents agree.

Considering sustainability in their local area, roughly one in four (24%) rural residents agree that there is sufficient infrastructure in to help them live sustainably, while a plurality of two in five (43%) disagree. A slightly higher proportion (29%) of those in urban areas agree that there is sufficient infrastructure to help them live sustainably, suggesting that there is more that can be done to support rural residents to live sustainably.

Large-scale demographic differences in perceptions of the local environment and sustainability are evident for rural residents. Women are more likely to agree that the local environment is valued compared to men (45%; 34%), while men are more likely to agree that there is sufficient infrastructure to help them live sustainably (27%; 22%). In addition, those in higher social grades are also more likely to agree that the local environment is valued and taken care of than those in grades C2DE (43%; 36%).



LIFE SATISFACTION

Rural Scots are generally satisfied with most aspects of their life, including their quality of life, general health and the area they live in.

Rural residents are generally satisfied (either “fairly satisfied” or “very satisfied”) with many different aspects of their lives, with seven in ten or more of those that express an opinion saying they are satisfied with their home (87%), the area they live in (85%), their quality of life (81%), their employment (76%) and their general health (70%). In most cases, rural residents are more satisfied with these aspects of their life than their urban peers, a testament to the strengths of rural life.

However, critical differences in life satisfaction emerge among rural residents. Those in higher social grades ABC1 are more likely to be satisfied with almost all aspects of life surveyed. In addition, older residents, those 55+, are more likely to be satisfied with the area they live in than those 16-34 (87%; 76%), perhaps tied to wider economic and social challenges in rural areas.

Proportion of respondents that are satisfied/dissatisfied with each aspect of their lives



BASE: RURAL (1,980), URBAN (1,331)
NOTES: Don't knows / NA excluded

LOCAL AREA SATISFACTION

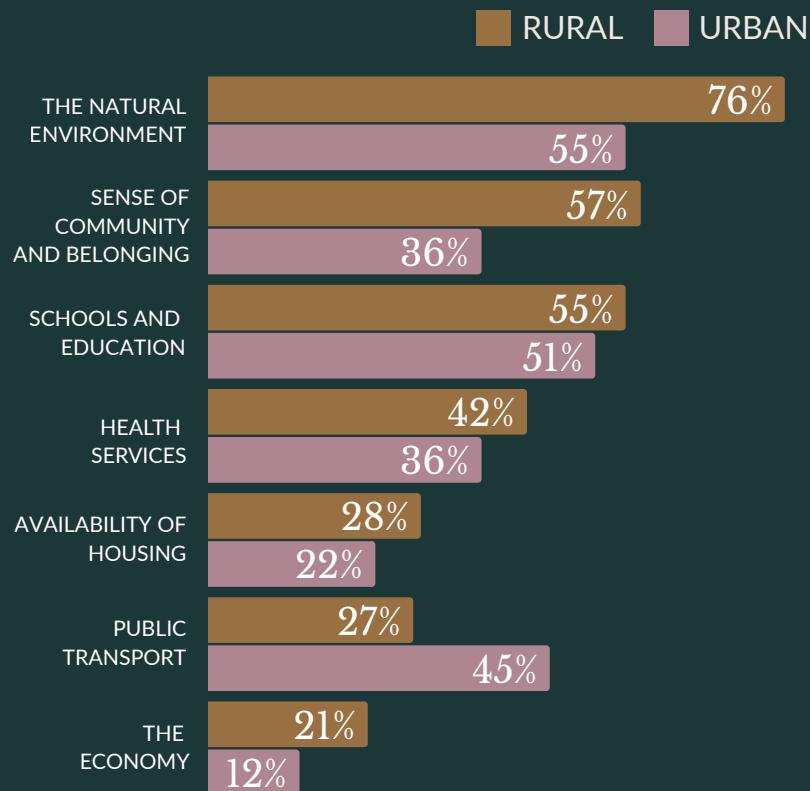
Thinking about their local area, rural Scots are most satisfied (either “fairly satisfied” or “very satisfied”) with the natural environment, with three in four (76%) rural residents that express an opinion satisfied with this aspect. Following at a distance, over half are satisfied with the sense of community and belonging (57%) and schools/education (55%) in their area.

However, satisfaction with public services and infrastructure in their area is notably low. Two in five (42%) rural residents are satisfied with health services in their local area, while under three in ten are satisfied with the availability of housing (28%) and public transport (27%). Compared to other aspects of their local area, rural residents are least satisfied with the local economy (21%).

Similar to findings around life satisfaction, rural residents are more satisfied with almost all aspects of their local area than urban residents, with particularly more satisfaction when it comes to the natural environment (76%; 55%) and sense of community and belonging (57%; 36%). However, urban resident record significantly higher levels of satisfaction around local public transport (45%; 27%).

Among rural residents, those in remote rural areas are more likely to be dissatisfied with the availability of housing in their local area compared to those in accessible rural areas (59%; 36%), while those in lower social grades (C2DE) are more likely than those in ABC1 to be dissatisfied with local health services (48%; 38%). Such findings illustrate that the burden on public services and infrastructure is not felt equally.

Proportion of respondents that are satisfied/dissatisfied with each aspect of their local area



BASE: RURAL (1,971), URBAN (1,331)

NOTES: Don't knows / NA excluded



MOTIVATIONS FOR EMIGRATION

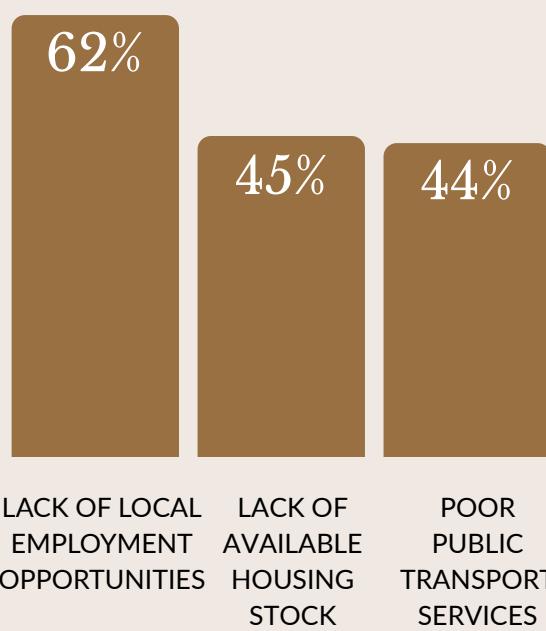
Overall, lack of employment opportunities, available housing stock and poor public transport services are thought to drive rural to urban migration.

Thinking about the three main reasons why people from rural communities might move to more urban areas in Scotland, rural Scots most frequently mention the lack of local employment opportunities in rural areas (62%). This motivation is followed at a distance by lack of available housing stock (45%) and poor public transport services (44%) in rural areas.

Perceptions of top motivations for rural emigration vary by demographic. For example, rural men are more likely than rural women to cite the lack of employment opportunities as a top motivation for people to move to a more urban area (65%; 58%). Conversely, women are considerably more likely to mention poor public transport as a main rationale (49%; 39%).

Some demographics are more likely to emphasise lack of available housing stock as a driver of rural emigration. About half of those 55+ (50%) and those in higher social grades (48%) select this as a top motivation, compared to one in three (35%) of those 16-44 and two in five (41%) of those in grades C2DE. In addition, those in remote rural regions are more likely to mention lack of available housing stock as a motivator for emigration than those in accessible rural areas (59%; 40%).

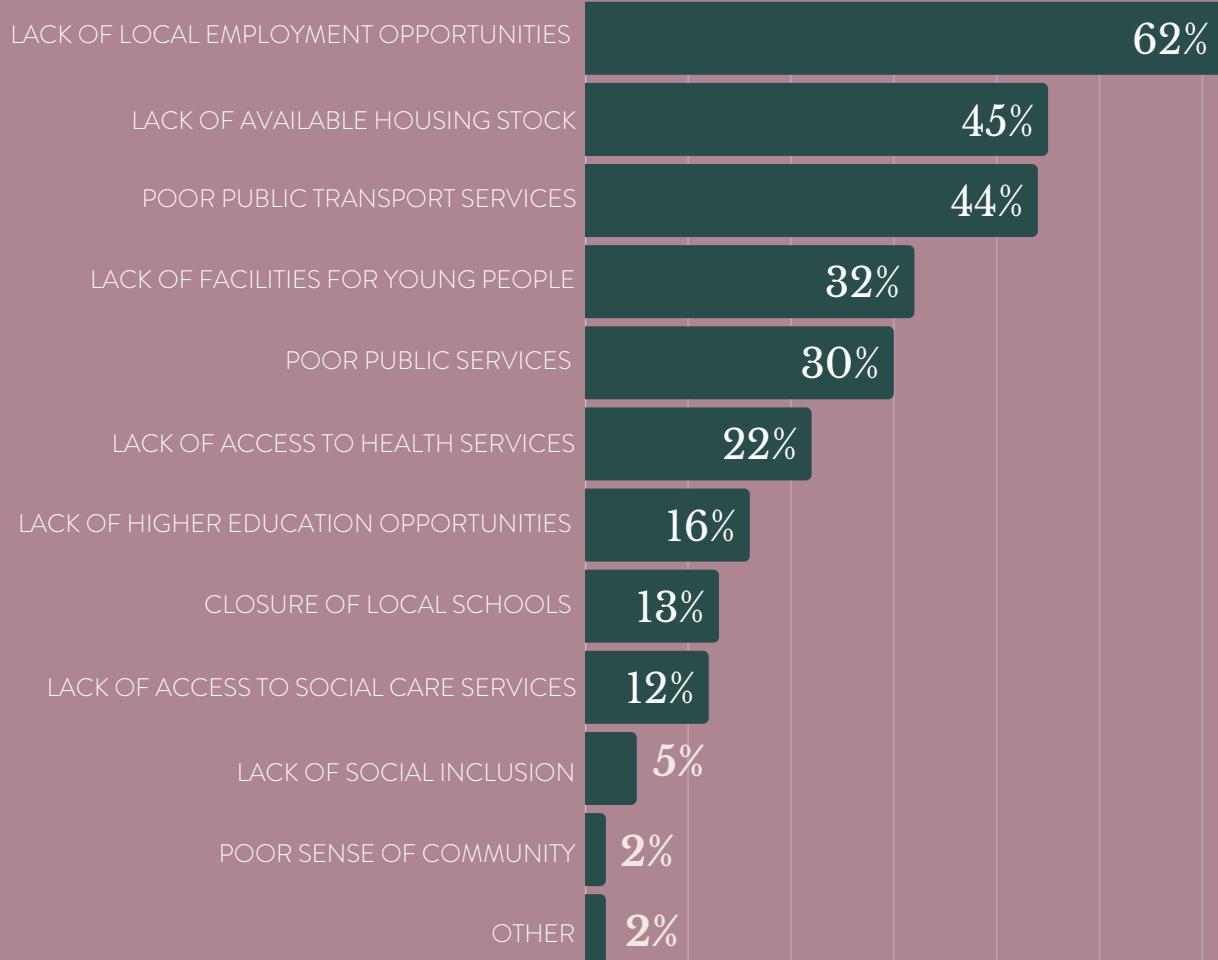
Proportion of rural respondents citing each matter as a top three reason why people might move to urban areas of Scotland



BASE: RURAL (1,984)
NOTES: Top three answer options shown

MOTIVATIONS FOR EMIGRATION

Proportion of rural respondents citing each matter as a top three reason why people might move to urban areas of Scotland



Thinking about population movement, what do you think are the main reasons why people from rural communities might move to more urban areas in Scotland? (Please select up to three)

BASE: RURAL (1,984)

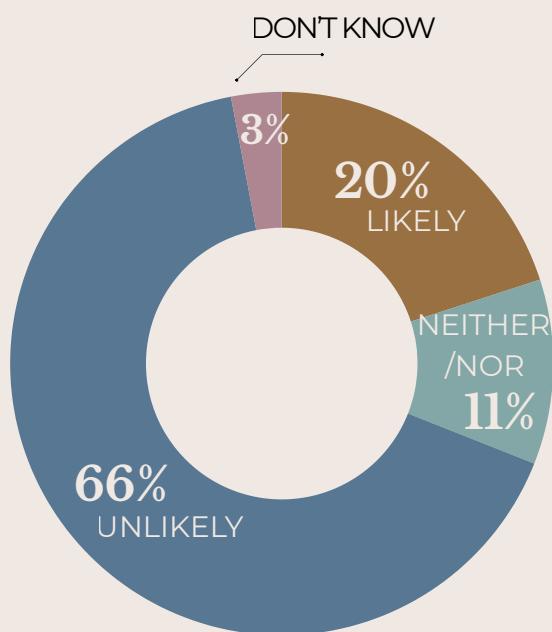
LIKELIHOOD OF EMIGRATING

Considering the possibility of their own emigration, most (66%) rural residents report that they are unlikely (either "somewhat unlikely" or "very unlikely") to move to an urban area of Scotland.

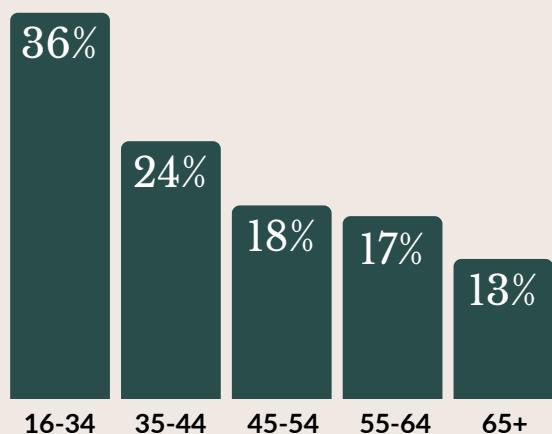
However, one in five (20%) rural residents report that they are likely to move to an urban area. While a minority, this proportion poses sizable risk for ageing rural communities. More of those of working age (16-64) report that they are likely to move to an urban area than those 65+ (23%; 13%), with this peaking for the youngest, aged 16-34 (36%), exacerbating current workforce gaps. Furthermore, more of those with children say that they are likely to move to an urban area compared to those without children (26%; 19%), impacting the make-up of future rural communities.

Rural residents who are dissatisfied with some aspects of their life, including the area they live in (38%; 19%), their overall quality of life (28%; 19%), their home (29%; 20%) and their employment (30%; 21%) are more likely than those that are satisfied with these areas to report likelihood of moving to an urban area, suggesting that shoring up these vital aspects of rural areas can encourage residents to remain.

Proportion of rural respondents that are likely/unlikely to move to an urban area of Scotland



Proportion of rural respondents that are likely to move to an urban area by age

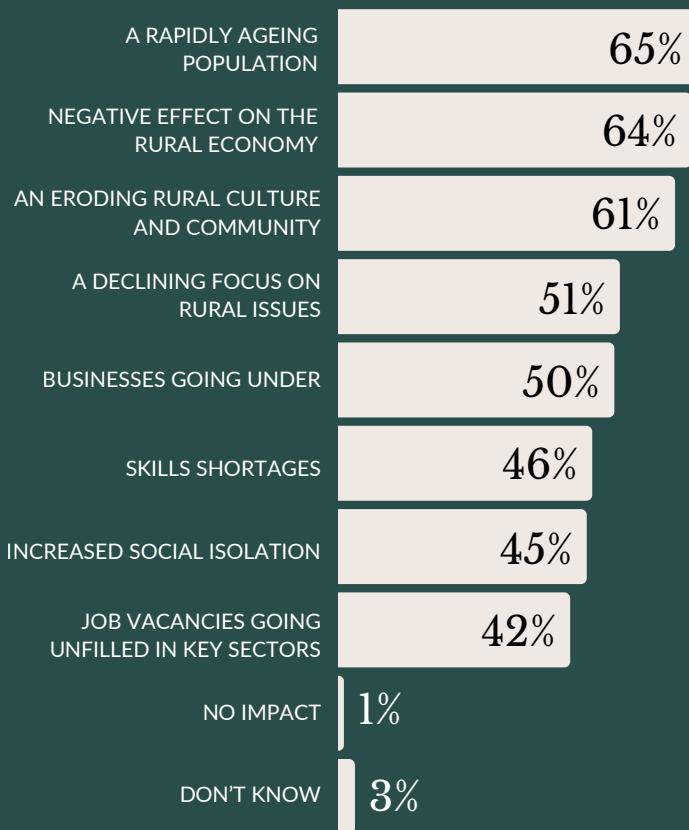


BASE: RURAL (1,984)



IMPACT OF EMIGRATION

Proportion of rural respondents citing each matter as being an impact of large-scale rural emigration



BASE: RURAL (1,984)

Nearly all (96%) rural residents believe that large-scale rural emigration would have an impact on rural areas. When considering potential impacts, rural Scots most frequently cite a rapidly ageing population (65%), a negative effect on the rural economy (64%) and an eroding rural culture and community (61%). Other impacts are selected by two in five or more Scots, suggesting that the potential impacts of rural depopulation are widespread, encompassing demographic, economic and cultural impacts.

Interestingly, among rural residents, men are more likely than women to report that rural depopulation erodes rural culture and community (65%; 58%). Furthermore, those in remote rural areas are more likely than those in accessible rural areas to believe that rural emigration would lead to a range of impacts, including a rapidly ageing population (74%; 62%), skills shortages (54%; 43%) and job vacancies going unfilled in key sectors (51%; 38%).



PUBLIC SERVICES AND INVESTMENT

Overall, rural Scots emphasise that public services and infrastructure are struggling and need investment. Four in five (80%) rural residents agree (either “somewhat agree” or “strongly agree”) that there has been a lack of investment in infrastructure, such as housing, roads and public transport in rural Scotland, while only one in seven (15%) agree that public services are meeting the needs of rural communities in Scotland. High proportions of urban residents say the same, with two in three (65%) of those in urban areas agreeing that there has been a lack of investment in infrastructure in rural areas and just one in ten (11%) agreeing that public services are meeting the needs of rural communities in Scotland; however, a notable proportion of urban Scots respond that they don’t know, at 18% and 25% respectively.

Perhaps as a result of different experiences with public services by social grade, rural Scots in lower social grades (C2DE) more frequently disagree that public services like healthcare, education and policing are meeting the needs of rural Scotland compared to those in grades ABC1 (70%; 64%).

Proportion of rural respondents that agree/disagree with each statement

■ AGREE ■ NEITHER/NOR ■ DISAGREE

THERE HAS BEEN A LACK OF INVESTMENT
IN INFRASTRUCTURE SUCH AS HOUSING, ROADS AND
PUBLIC TRANSPORT IN RURAL SCOTLAND



PUBLIC SERVICES LIKE HEALTHCARE, EDUCATION
AND POLICING ARE MEETING THE NEEDS OF RURAL
COMMUNITIES IN SCOTLAND

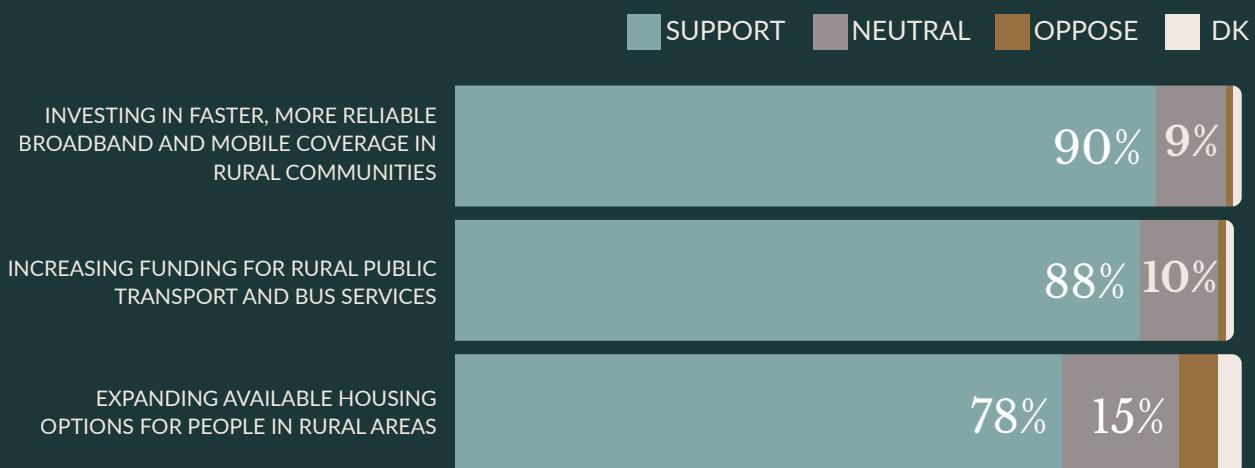


BASE: RURAL (1,982)
NOTES: Don't know answers not displayed (3%; 6%)



SUPPORT FOR GOVERNMENT ACTION

Proportion of rural respondents who support/oppose the Scottish Government taking each of the following actions



BASE: RURAL (1,975)

Across the board, rural residents are widely supportive (either “support” or “strongly support”) of the Scottish Government taking actions to improve rural communities, including investing in better broadband and mobile coverage in rural areas (90%), increasing funding for rural public transport (88%) and expanding available housing options for people in rural areas (78%). Rates of support for these actions are similar to urban peers, about four in five or more of whom support each action.

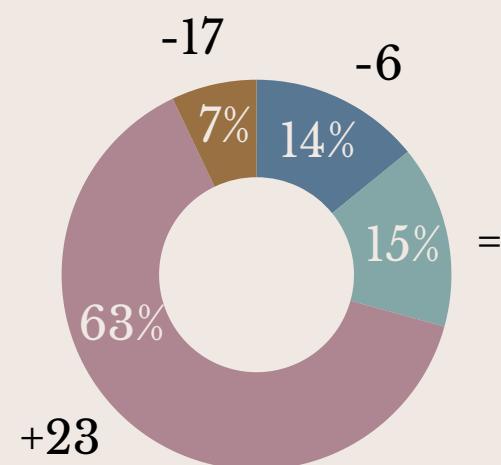
Although support for the Scottish Government taking each action is high across all rural demographics, women are more likely than men to express support for increasing funding for rural public transport (92%; 84%), while those in remote rural areas are more likely to support expanding available housing options for people in rural areas than those in accessible rural areas (83%; 76%).



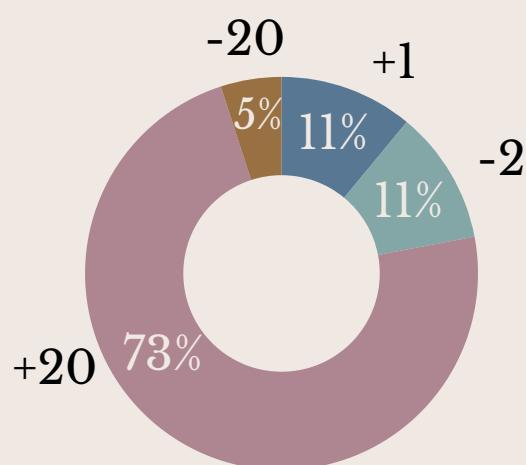
REPRESENTATION



PEOPLE LIVING IN SCOTLAND'S RURAL COMMUNITIES HAVE A MEANINGFUL VOICE IN SHAPING DECISIONS THAT AFFECT THEM



DECISION-MAKERS UNDERSTAND THE NEEDS OF RURAL COMMUNITIES IN SCOTLAND



BASE: RURAL (1,980), URBAN (1,329)
NOTES: Figures outside chart represents difference from Urban sample

Nearly two in three (63%) rural residents disagree that people living in Scotland's rural communities have a meaningful voice in shaping decisions that affect them, with just one in seven (14%) that agree with this statement.

Another sizable majority, almost three in four (73%) rural Scots disagree that decision-makers understand the needs of rural communities in Scotland. Only one in nine (11%) rural residents agree with this statement.

Reflecting on the representation of rural Scots, a plurality of urban residents also disagree with each statement, at 41% and 53% respectively.

Feelings of representation also differ across rural geographies. Residents in remote rural areas are more likely than those in accessible rural areas to disagree that people living in rural communities have a meaningful voice in decisions (70%; 61%) and that decision-makers understand the needs of rural communities (79%; 71%). Those in the Highlands and Islands and North East Scotland Scottish Parliamentary regions are more likely than rural residents in many other regions to disagree with both statements on representation, perhaps as a result of the unique needs of northern communities.



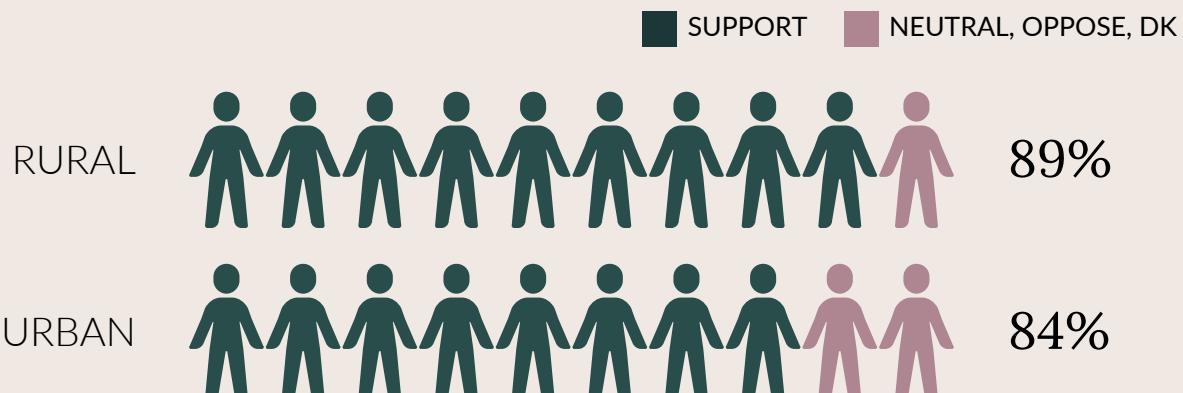
SUPPORT FOR DECISION-MAKING POWER

Reflecting on possible government action that may increase feelings of representation, a vast majority (89%) of rural Scots support (either “support” or “strongly support”) the Scottish Government giving rural communities more power to make decisions about local services and development.

Looking across demographics, a similar proportion of urban residents (84%) support the Scottish Government giving rural communities more decision-making power about local services and development, providing support for rural devolution from across Scotland. Furthermore, the call for more decision-making power is high across a variety of demographics in rural communities.

Proportion of respondents that support/oppose the Scottish Government taking the following action in rural communities in Scotland

GIVING RURAL COMMUNITIES MORE POWER TO MAKE DECISIONS ABOUT LOCAL SERVICES AND DEVELOPMENT



BASE: RURAL (1,978), URBAN (1,333)

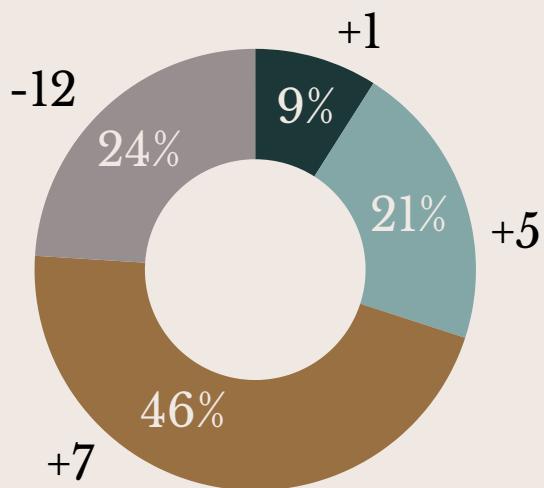


SUPPORT FOR BUSINESSES

Proportion of rural respondents that agree/disagree with the following statement

■ AGREE ■ NEITHER / NOR ■ DISAGREE
■ DON'T KNOW

THERE IS EFFECTIVE SUPPORT FOR BUSINESSES IN RURAL SCOTLAND



BASE: RURAL (1,982), URBAN (1,330)

NOTES: Figures outside chart represent difference from Urban sample

Just one in ten (9%) rural residents agree (either "somewhat agree" or "strongly agree") that there is effective support for businesses in rural Scotland, while a plurality (46%) disagree. However, well over two in five (45%) neither agree nor disagree, or respond that they don't know, suggesting that many in rural communities may be unfamiliar with the support available to local businesses.

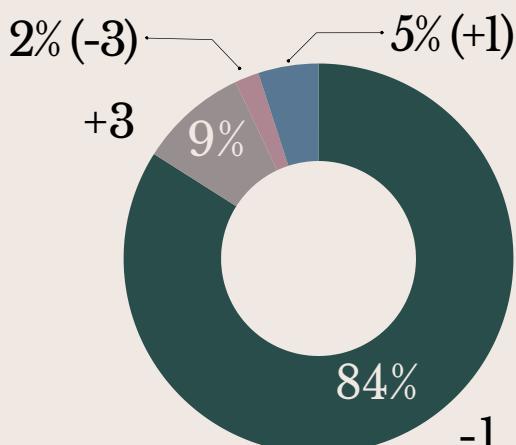
A similar proportion of urban Scots agree (8%) and disagree (39%) with this statement, although urban residents are more likely to report that they don't know (36%), likely as a result of their distance from rural life.

BUSINESSES AND GOVERNMENT

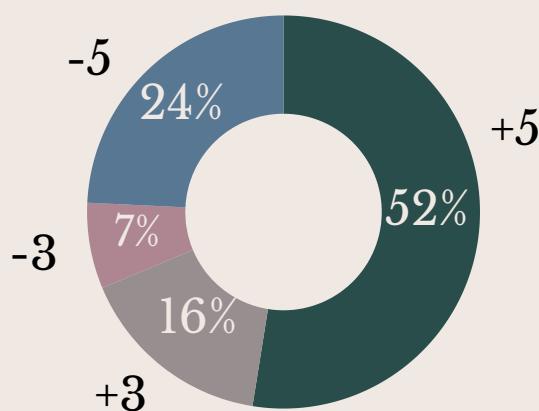
Proportion of rural respondents that agree/disagree with each statement

■ AGREE ■ NEITHER / NOR ■ DISAGREE
■ DON'T KNOW

THE SCOTTISH GOVERNMENT SHOULD DO MORE TO SUPPORT LOCAL BUSINESSES



LOCAL INDUSTRIES STRUGGLE DUE TO OVER-REGULATION



BASE: RURAL (1,963), URBAN (1,316)
NOTES: + and - figures represent difference from Urban sample

Perhaps as a result of perceptions of lack of support for rural businesses, rural Scots overwhelmingly agree (either "somewhat agree" or "strongly agree") (84%) that the Scottish Government should do more to support local businesses. Only 2% disagree with this statement.

About half (52%) also agree that local industries struggle due to over-regulation, with under one in ten (7%) that disagree.

Similar patterns of response can be seen among urban residents. However, urban Scots are less likely to agree with the statement that local industries struggle due to over-regulation, and more likely to respond that they don't know, suggesting that local industries are situated closer to rural communities.

Among those in rural areas, those in lower social grades C2DE are more likely than those in grades ABC1 to agree that local industries struggle due to over-regulation (55%; 50%). And turning to age, the youngest generation, ages 16-34, are more likely than the oldest (65+) to agree that the Scottish Government should do more to support local businesses (89%; 81%), but less likely to agree that local industries struggle due to over-regulation (45%; 55%).

IMPORTANCE & IMPACT

Thinking about the importance and impact of key sectors on their local area, rural Scots are most positive about the importance of farming/crofting and hospitality/tourism. However, almost all sectors receive an average rating of five or more, signifying medium (4-6) or high (7-10) importance on local rural areas.

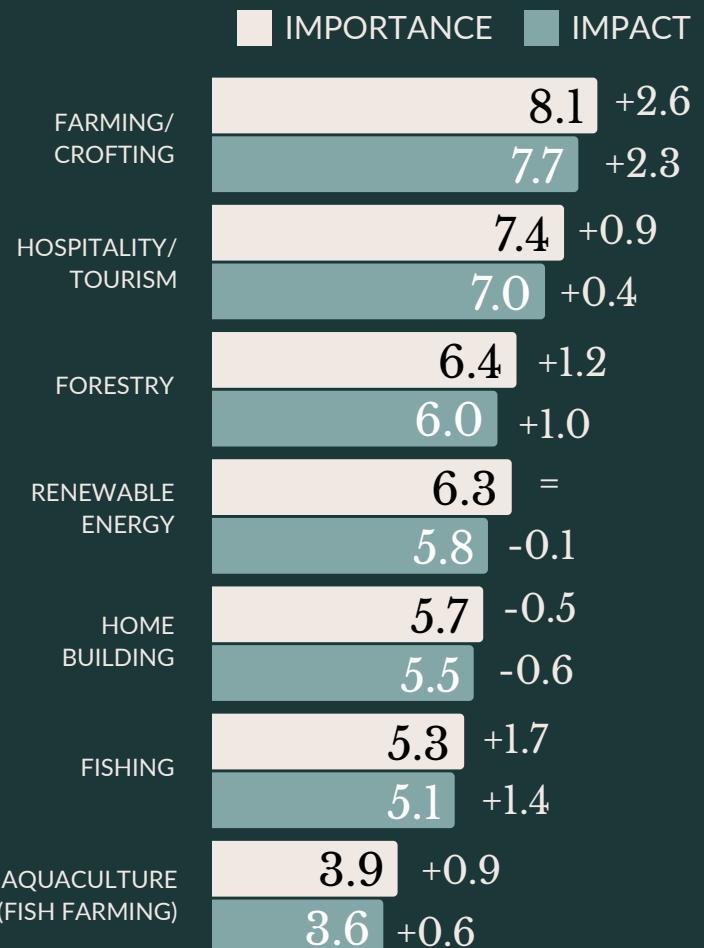
Interestingly, averages for the positive/negative impact of each sector on the rural local area lag slightly behind averages for importance across all sectors.

Critically, a notable proportion respond that they don't know the importance (21%) or impact (29%) of aquaculture on their local area, more than recorded for other sectors, indicating that low familiarity affects perceptions.

Averages for the local importance and impact of most sectors, excluding renewable energy and home building are notably higher amongst rural residents than their urban peers, emphasising the vital role these sectors play in rural communities. In addition, those in remote rural areas perceive a greater degree of importance and impact of some sectors on their local area than those in accessible rural areas. For instance, 42% of remote rural residents report that aquaculture is highly important (7-10) to their local area, compared to just 13% of accessible rural respondents.

Rural residents in lower social grades C2DE are more likely than those in higher social grades ABC1 to say that fishing (43%; 32%), home building (41%; 34%) and aquaculture (24%; 18%) are important, indicating their continued importance for those economically disadvantaged.

Average rating of the importance and impact of the following sectors on local areas on a scale of 0 to 10, among rural respondents



BASE: RURAL (1,874), URBAN (1,243)

NOTES: Don't knows excluded, figures outside chart represents difference from Urban sample



RESULTS IN CONTEXT



**Tavish Scott - CEO,
Salmon Scotland**

"Scotland's rural towns, villages and coastal communities should be thriving places where people want to raise their families supported by well-paid, highly-skilled jobs. As a proud Shetlander, I recognise the enjoyment people take from our outstanding natural and marine environment and the sense of local community and belonging. But this survey shows the reality of public services in many places, with poor access to healthcare, housing and transport contributing towards rural depopulation. Scottish salmon is a global success story, rooted in the Highlands and islands, creating and maintaining the jobs that keep our coastal communities alive. Creating growth, securing more employment, delivering better wages and anchoring rural and coastal population strength is what our sector does. We ask a future government to enable us to be even better."

"This report reinforces what we hear every day from our members: rural communities are proud, resilient and full of potential, but too often face barriers that limit their ability to thrive. Whether it's housing, transport, digital connectivity or access to essential services, these issues are central to the well-being and sustainability of rural Scotland. At NFU Scotland, we believe that strengthening rural infrastructure, empowering local decision-making and supporting the businesses that underpin our rural economy must be a national priority. We urge policymakers to treat these findings as a clear call to action."



**Robert Neill - Vice President,
NFU Scotland**



**Jane Wood - CEO,
Homes for Scotland**

"These are critical insights from rural Scots, which show that nearly half view the lack of available housing as a key driver for people moving away from their communities, their work and their local economies. Building more new, high quality, energy efficient homes for rural communities has never been more urgent if Scotland is to reverse depopulation and improve the social and economic wellbeing of every part of the country. Urgent action is now needed to support the small and medium home builders, whose numbers have fallen 70% since 2007 and are so critical to employing and training people across rural communities and delivering much needed rural homes."



SCOTLAND'S RURAL VOICE

© 2025 The Diffley Partnership



DELIVERING MORE
HOMES FOR
SCOTLAND

