

# **SUSTAINING SHETLAND**



**Monitoring Social, Economic, Environmental  
and Cultural Trends**

**Autumn 2006**

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## INTRODUCTION

This document sets out social, economic, environmental and cultural data for Shetland, capable of measuring Shetland's quality of life and sustainability.

The Shetland Resolution was developed as part of the Long Range Forecast project in Shetland in late 2004. This was a first attempt at gathering the views of the Shetland public on the future of the islands for the next 20 or 30 years or so. It is hoped that this analysis will help public agencies in Shetland to work with business and communities towards that future.

### Shetland Resolution

We shall work together for a future that's better and brighter. In particular, we aim to create a secure livelihood, look after our stunning environment and care well for our people and our culture.

We recognise that we can only succeed in any of these aims by succeeding in all of them.

#### **In our economy,**

- We want to be known for carefully-crafted products and excellent service.
- We shall nurture creativity, build skills and encourage enterprise.
- We'll promote fine quality and unique origin because they're vital to our customers.
- We'll seek to create fulfilling, well-paid jobs for all, whatever their talent.
- We'll use the natural resources at our disposal responsibly and seek more control over them.
- Public sector resources will be used to stimulate a stronger private sector.

#### **In our environment, we shall...**

- Take pride in our heritage, natural or manmade, and respect it for its own sake;
- Recognise that our livelihood depends on our environment;
- Work with nature in all its diversity, not against it;
- Restore our environment where it has been damaged;
- Use the gifts of nature responsibly; and
- Play our part as responsible members of the world community.

#### **In our community, we shall...**

- Cherish and promote our traditions and our values;
- Keep Shetland's people safe and encourage them to be healthier;
- Foster confident, thriving communities across Shetland;
- Welcome visitors and new Shetlanders from wherever they may come;
- Promote justice and equality, here and overseas; and
- Expand knowledge, extend opportunities and improve access.

#### **And...**

We may be a small place, but if we're clever we can be more successful.

*We may have few people, but we can welcome more.*

We may be modest, but we can take pride in our achievements.

*We may be remote, but we can be distinctive.*

**But in everything we do, we must seek excellence.**

The Resolution is a statement about quality of life and sustainability to which Shetland can aspire. In order to ensure the words are used to guide policy development in Shetland, data has been collated in order to measure and evaluate progress towards this aspiration on an ongoing basis.

This document provides baseline data, and, where possible, highlights trends. This set of information should help us observe whether things are improving or getting worse over time in certain areas and help us to compare and contrast the situation in Shetland with other places. These trends will help to inform policy and decision-making and provide Shetland with an informed picture of the effects of policy and decision on the islands.

Indicators have been developed in ten key areas:

	<b>Measure</b>	<b>Indicators</b>
1	Population	Population Size & Structure
2	Health	Avoidable Deaths, Life Expectancy, Drug and Alcohol Use
3	Education	Opportunity, Participation, Attainment
4	Crime	Incidents of Crime and Fear of Crime
5	Housing	Quantity, Quality, Appropriateness and Affordability
6	Transport & Communications	Access to Services, Social Facilities, Employment and ICT
7	Natural Resources	Resource Usage and Impact
8	Economy	Economic Activity, Employment & Business Performance
9	Social Welfare	Income Levels and Costs of Living
10	Community	Breadth and Depth of involvement

The indicators will be updated on an annual basis and gaps in data will be filled. For example, data on perceptions of the Shetland public will be collected from Your Voice, Shetland's citizen's panel. In future years, greater assessment of key trends will be made, with simple assessment of what is worse, better or stable.

In the coming year information covering the same ten key areas will be collected at a more local level, involving the communities and incorporating their views of communities. These community profiles will cover the following seven localities:

- North Isles
- Whalsay and Skerries
- North Mainland
- West Mainland
- Central
- Lerwick and Bressay
- South

And be available at <http://www.shetland.gov.uk/datashare//default.asp>

Thanks to all those involved in the development of these indicators and production of this year's report.

## OVERVIEW

The Shetland Islands are the most northerly local authority area in the UK, 298 miles north of Edinburgh and 211 miles north of Aberdeen. Our closest neighbours are Orkney, the nearest part of which lies some 25 miles from Fair Isle and about 50 miles from the Shetland mainland. Shetland is only 228 miles from Torshavn in Faroe and a similar distance from Bergen in Norway. Shetland comprises more than 100 islands, 15 of which are inhabited, and the total population is around 22,000. We lie further north than Moscow and southern Greenland.

## Population

- Shetland's population has fallen by 6% over the last twenty years, an average of around 70 people a year. However there are signs this trend may be reversing: more people moved to Shetland than moved away in 2004-05 and birth rate continues to be higher than death rate.
- The trend towards centralisation of the population towards Lerwick and a 15-20 minute commute of Lerwick continues, to the detriment of more remote areas.
- Since 1991, Shetland's population aged over 65 has risen by 20%.
- There is currently no research locally into population projections for Shetland and for different areas of Shetland.

## Avoidable Death and Life Expectancy

- Shetland's life expectancy is slightly above the Scottish average. Levels of avoidable deaths in Shetland are fairly stable at around 100 a year.
- Although Shetland has fewer people misusing drugs than the national average, the age of starting is becoming younger (from 14 to 12.9 in the year to 2004-05) and is lower than the national average. The numbers of young people presenting with self-harm is also increasing.

## Education

- Attainment levels in schools are high, with 45% of pupils going on to higher or further education and a similar number into employment.
- However, this is not the circumstance for all young people in Shetland and it is estimated that 2500 working age adults in Shetland have literacy needs. For those without suitable skills for employment barriers to learning include access, lack of childcare and cost.

## Crime

- In general, crime levels are stable. However, over the last three years there has been an increase in the amount of road accidents and those killed or injured on Shetland's roads.
- Number of reported incidents of domestic abuse is increasing.
- Nearly a third of people in Shetland, in 2005, were worried about becoming a victim of crime.

## Housing

- The number of houses in Shetland continues to rise, primarily due to an increase in private housing. However the average price of a house increased 12% in 2005, whilst the number of local authority and housing association properties available has been falling since 2002.

This makes it increasingly difficult for first time buyers, whilst the probability of being offered a council house in the area of an applicants choice is low and decreasing in many areas: for example over the last two years there was a 2% chance of getting a council property in Lerwick.

- 25% of Shetland households are in fuel poverty (nearly double the Scottish average) due to a combination of severe climate, high costs of fuel and poor housing standards, particularly in the private housing stock in remote rural areas.

### Transport and Communications

- Vehicle ownership and inter-island ferry and bus usage in Shetland continues to rise, as does usage of external air and sea routes.
- Community involvement in the development of Shetland's Regional Transport Strategy suggests the need for an increase in the availability of public transport.

### Natural Resources

- Existing data available to measure the quality of the environment in Shetland, such as air and water quality, paint a good picture. However, further measures are required to ensure the situation is fully understood.

### Economy

- The Gross Regional Domestic Product per capita of Shetland is £15,245, compared to £18,515 for the UK. Fisheries output, oil and the Council remain the three largest sectors in the economy, considerably higher than agriculture, tourism and knitwear.
- 85.2% of the working age population is in employment, with the public sector dominating. 14% of household income is derived from self-employment, compared to 8% for Scotland as a whole.
- New business start-ups have been fairly steady over recent years, at around 30 per annum.

### Social Welfare

- The average wage level in Shetland is higher than the Scottish average, although this is not the case for women, whilst the cost of living is higher, particularly for essential items. This makes it particularly difficult for those on low income and/or national benefits, whilst uptake of national benefits is felt to be lower than entitlement.
- Fuel poverty remains high and decreasing numbers of registered child minders is restricting people's access to learning and employment opportunities.

### Community

- Community groups and volunteering continue to flourish and there are signs of increased involvement in leisure activities. However, turn out at local and national elections is low and there are signs of volunteer overload.

## POPULATION

**Shetland's population has fallen by 6% over the last twenty years, an average of around 70 people a year. However there are signs this trend may be reversing: more people moved to Shetland than moved away in 2004-05 and birth rate continues to be higher than death rate.**

**The trend towards centralisation of the population towards Lerwick and a 15-20 minute commute of Lerwick continues, to the detriment of more remote areas.**

**Since 1991, Shetland's population aged over 65 has risen by 20%.**

**There is currently no research locally into population projections for Shetland or different areas of Shetland.**

### What is measured

The total number of people resident in Shetland, population density and the population of areas of Shetland are measured using data from the census<sup>1</sup>. The next census is planned for 2011. For intervening years data is sourced from the General Register Office for Scotland (GROS) mid-year estimates and patient record statistics from NHS Shetland.

Trends in the structure of the population are monitored through age and gender distribution levels. These are measured using the census and GROS mid-year estimates.

The total population of Shetland is a function of the number of births minus the number of deaths (the natural increase) and the difference between immigration and emigration (net migration).

- Births and deaths are monitored using GROS
- There is currently very little information on migration<sup>2</sup>, with estimates being made by GROS. The number of National Insurance numbers issued to people in Shetland can also provide an indication.
- Your Voice is being used to collect information on people's desire to live and work in Shetland and/or a particular area of Shetland.

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<sup>1</sup> Census, 2001. The next census will be carried out in 2011 with results not available until 2013. In the intervening period it is difficult to monitor and forecast population change with any degree of accuracy or certainty. Patient records and the GROS national population estimates and biennial forecasts provide useful information but they need to be interpreted with care as neither source can be considered to be a surrogate for the census.

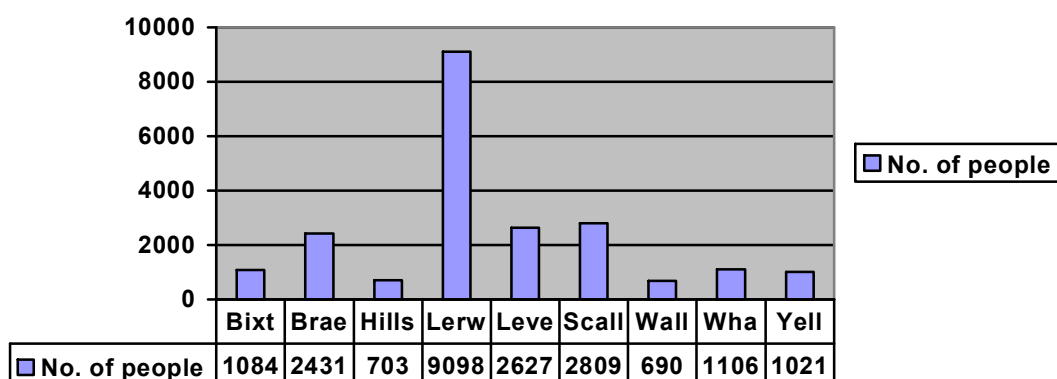
<sup>2</sup> Currently, there is no comprehensive system that registers migration in the UK, either moves to or from the rest of the world, or moves within the UK. Nationally, estimates are based on the National Health Service Central Register (NHSCR) for moves between health board areas within the UK, and the International Passenger Survey (IPS). There are problems with the NHSCR as there are thought to be problems with people not deregistering with a GP. Anecdotal evidence also suggests that migrant workers are less likely to register with a GP. The IPS contacts a small percentage of migrants for the survey, particularly for Scottish migrants, and therefore estimates derived from the IPS are subject to larger sampling and non-sampling errors and is considered less reliable than UK level estimates.

## Shetland's population level

(See Figure 1)

- Population estimates suggest that Shetland's usually resident population is currently fairly static, falling from 21,988 in 2001<sup>3</sup> to 21,940 in 2004 and rising to 22,000 in 2005<sup>4</sup>.
- This compares to a population of 26,502 in Eilean Siar in 2001 decreasing by 100 by 2005 and a population of 19,245 in Orkney in 2001 increasing by 345 by 2005<sup>5</sup>.
- After decades of decline the population of Shetland, which had fallen to nearly 17,000 in the mid-1960s, rose by 35% between 1971 and 1981 as a direct result of oil related activity.
- In the early 1980s the population fell due to out migration after the end of oil construction activity. Shetland's usually resident population fell by 4% between 1981-1991, from 23,392 to 22,493.
- In the latter half of the 1980s and the early 1990s the population level became fairly stable. However, the 2001 Census recorded a decrease from 22,493 to 21,988<sup>6</sup>.

Figure 1: Population, 1931-2005<sup>7</sup>



- GROS estimate a decline in population to 19,553 by 2024. However, the methods used to calculate are blunt.

## Population density of Shetland

- Shetland has a population density of 15 people per square kilometre. It is less densely populated than Orkney (at 19) but more dense than Argyll & Bute, Eilean Siar and Highland (at 8)<sup>8</sup>. Shetland's population density is much lower than that of Guernsey (950) and substantially lower than that of Scotland as a whole (65).

<sup>3</sup> Census, 2001

<sup>4</sup> General Register Office for Scotland estimates, 2004 & 2005

<sup>5</sup> Census, 2001

<sup>6</sup> Census, 2001 and GROS estimates 2005

<sup>7</sup> Census and GROS estimates 2005

<sup>8</sup> Census, 2001



- The density of population within Shetland varies from 1571 people per square kilometre in Scalloway and 1328 in Lerwick to 5 in the North Isles, 6 in the North Mainland and 7 in the West Side<sup>9</sup>.

### Shetland's population by area

(See Table 1)

- The centralisation of the population continues, with substantial increases in recent times in Quarff, Gulberwick, Tingwall and Trondra, as well as Bressay and Sandwick/Cunningsburgh.
- Rural areas with particular decline in the population are Delting, most of the Outer Isles, Northmavine, Yell and Unst. The closure of RAF Saxa Vord, Unst, in early 2006, has seen the loss of one fifth of the islands population.

Table 1: Population by Area 1971- 2001<sup>10</sup>

	1971	1981	1991	2001	10 Yr % pop change	20 Yr % pop change
Bressay	258	334	352	384	9	15
Burra	565	850*	929	850	-9	0
Delting	718	2,211	1,976	1,734	-12	-22
Dunrossness	907	1,591	1,502	1,471	-2	-8
Fair Isle	65	69*	67	69	3	0
Fetlar	96	101	90	86	-4	-15
Foula	33	45*	42	32*	-24	-29
Gulberwick/Quarff	171	579*	398	662	66	14
Lerwick	6,028	6,899	7,336	6,830	-7	-1
Nesting	426	506	512	570	11	13
Northmaven	734	898	878	841	-4	-6
Papa Stour	24	35*	35*	24	-31	-31
Sandsting	912	1,002	891	945	-6	-6
Sandwick/Cunningsburgh	1,120	1,303*	1,352	1,432	10	10
Scalloway**	n/a	1,160	802	812	1	-30
Skerries	100	88*	87	76	-13	-14
Tingwall	1,680	1,080	1,431	1,722	24	64
Trondra	17	88	117	133	14	43
Unst	1,163	1,140	1,055	720	-32	-37
Walls and Sandness	516	573	554	601	8	5
Whalsay	871	1,025	1,041	1,034	-1	1
Yell	1,178	1,191	1,075	957	-11	-20
<b>Total</b>	<b>17,582</b>	<b>22,768</b>	<b>22,522</b>	<b>21,988</b>	<b>-2</b>	<b>-3</b>

\*estimated

\*\*from 1931 to 1971, the population figures for Scalloway are included in the figures for Tingwall

Populations were enumerated on a slightly different basis at the 1981 and 1991 Censuses, and are therefore not strictly comparable

1981 Census - Resident Population **excluding** absent households

1991/2001 Census - Resident Population **including** absent households

<sup>9</sup> Census, 2001

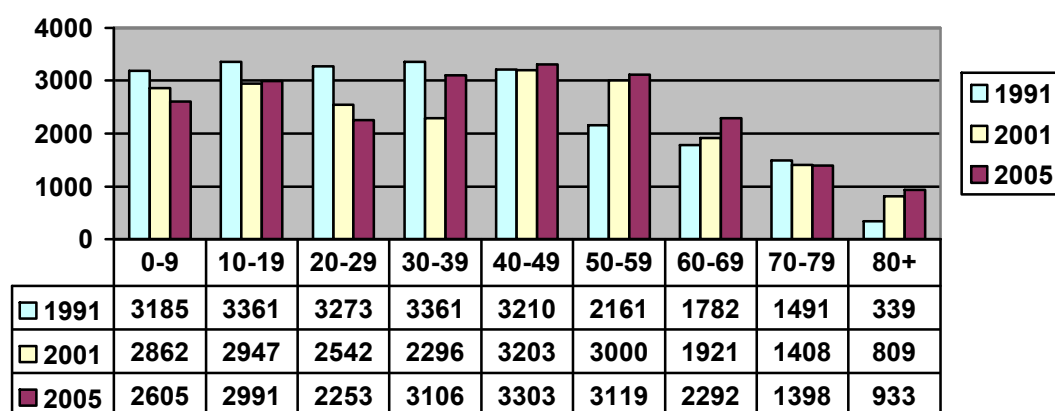
<sup>10</sup> Census

## Age breakdown of the Shetland population

(See Figure 2)

- Since 1991, the trend shows a gradual increase in the proportion of older people within the Shetland population, relative to younger people: the under 65 population has fallen by 6%, while the over 65 population has risen by 20%. This is a trend replicated across Scotland<sup>11</sup>.
- Over the last 14 years, there have been particular increases in the age ranges 50-59, 60-69 and 80+. This is due to an increasingly ageing population. There is also evidence that younger members of this age group are moving to Shetland for an improved quality of life.
- There have been particular decreases in the age ranges 0-9 and 20-29.
- There are now 16% of the Shetland population of pensionable age and over, which is slightly lower than the national average (19%)<sup>12</sup>.
- The total proportion of young people in Shetland is slightly higher than the national average<sup>13</sup>. For example the proportion of residents aged 0-19 was 26% compared to the Scottish average of 24%. However, on many of the islands of Shetland this proportion is below these levels (i.e. Fetlar at 20%, Yell 20% and Skerries 21%).

Figure 2: Age structure of the Shetland population 1991-2005<sup>14</sup>



## Gender breakdown of the Shetland population

(See Figure 3)

- In 2005 there were 122 more males than females: 50.28% of the population.
- However, up to and including the age range 50-59, males make up approximately 53% of the population. From the age range 70-79 and up there is an increasing proportion of females. This is due to females living longer than males.
- Scotland as a whole has a higher proportion of females, with a higher proportion of males in the population up to 30.

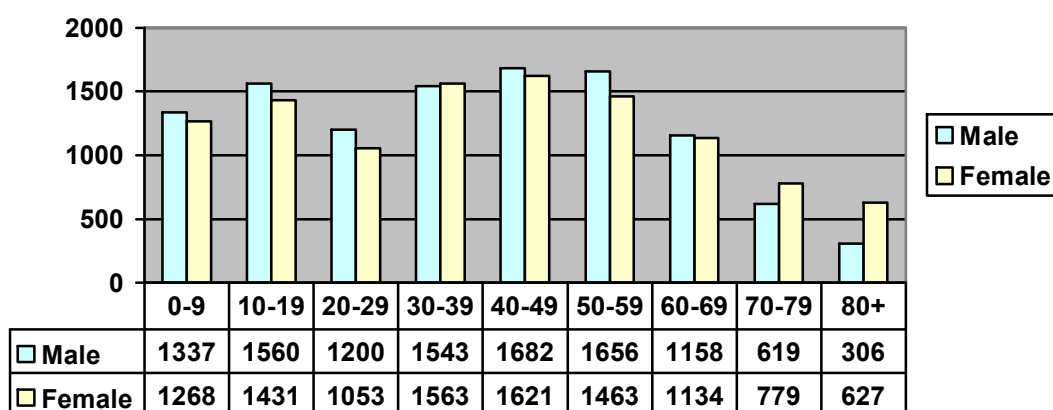
<sup>11</sup> General Register Office for Scotland

<sup>12</sup> Census, 2001

<sup>13</sup> Census, 2001

<sup>14</sup> Census and General Register Office for Scotland

Figure 3: Gender breakdown of the Shetland population, 2005<sup>15</sup>



### Births, deaths and natural population increase

- Shetland's birth rate is steadily higher than the death rate: since 1995 the birth rate has been higher than the death rate an average of 29.6 a year. In the year 2004-05 there were 28 more births than deaths<sup>16</sup>.
- This differs from the Scottish trend, where the death rate is higher than the birth rate in most areas, except Edinburgh and surrounding areas.

### Immigration and emigration

- In the 10 years since 1995 there has been a net emigration from Shetland of 1266 people<sup>17</sup>.
- There is evidence that this trend may be altering, as there was net immigration to Shetland of 32 people in the year 2004-05. And 142 new National Insurance numbers were issued in 2003-04 and 106 in 2004-05<sup>18</sup> in Shetland.
- This trend is similar in Orkney and Eilean Siar.

### Population Ethnicity

(See Figure 4)

- Data from the 2001 census shows Shetland has a very low black and ethnic minority population, just 1%. However, when the 2001 and 1991 census figures are compared, it can be seen that although the population of Shetland as a whole is decreasing, the black and ethnic minority population is increasing and effectively doubled over the 10 year period.
- When the census 2001 figures are broken down by ethnic group, it can be seen that although low numbers are involved, Shetland has a diverse black and ethnic minority population, with all census categories represented.

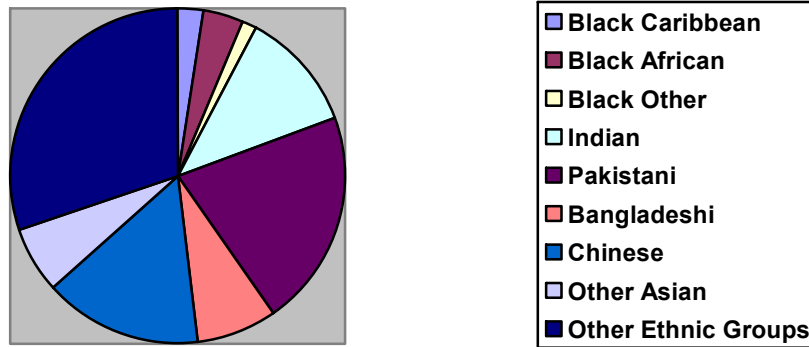
<sup>15</sup> General Register Office for Scotland

<sup>16</sup> General Register Office for Scotland

<sup>17</sup> General Register Office for Scotland

<sup>18</sup> Job Centre Plus, Shetland

Figure 4: Shetland's black and ethnic minority population



## LIFE EXPECTANCY AND AVOIDABLE DEATHS<sup>19</sup>

Shetland's life expectancy is slightly above the Scottish average. Levels of avoidable deaths in Shetland are fairly stable at around 100 a year.

Although Shetland has fewer people misusing drugs than the national average, the age of starting is becoming younger (from 14 to 12.9 in the year to 2004-05) and is lower than the national average. During the last year there has been a large increase in the number of users for whom cocaine and crack is their main problem drug. The numbers of young people presenting with self-harm is also increasing.

### What is measured

The General Register Office for Scotland measures average life expectancy for men and women.

Rates of deaths considered to be avoidable are available from NHS Shetland (cancer, coronary heart disease, stroke and suicide) and the Northern Constabulary (deaths resulting from car accidents).

Your Voice is being used to collect information on people's healthiness and sense of wellbeing.

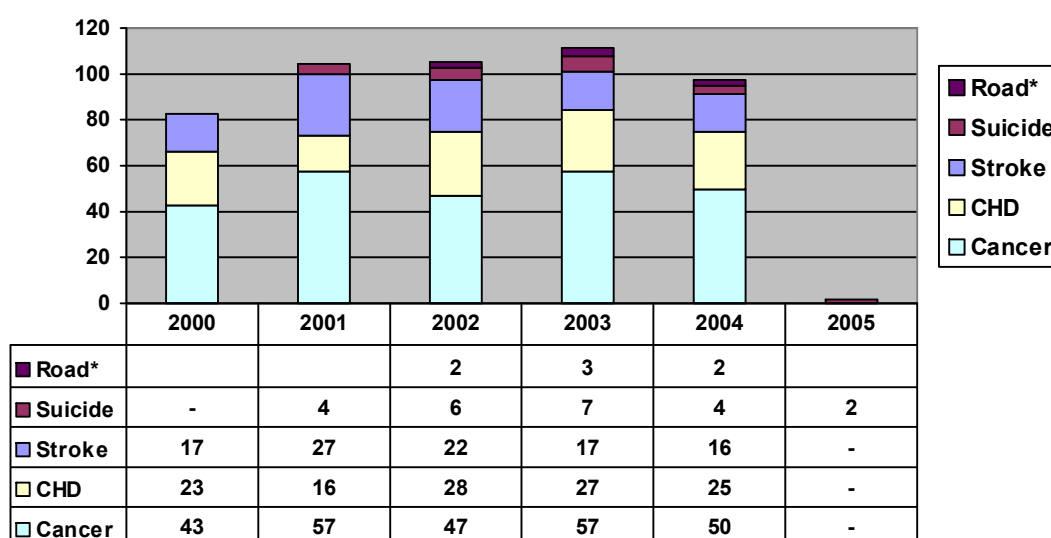
### Life expectancy

- Shetland's life expectancy is currently **74.2** for men and **80.3** for women<sup>20</sup>. This is slightly above the Scottish average, which is **73.8** for men and **79** for women, but slightly below Orkney, which stands at **76.5** for men and **80.5** for women.

### Rates of avoidable deaths

(see Figure 4)

Figure 4: Rates of avoidable death<sup>21</sup>



\* Figures for 2002-03, 03-04 and 04-05 respectively

<sup>19</sup> "Undetermined death" covers all accidental deaths with undetermined cause/intent, as defined by GROS

<sup>20</sup> GROS, 2005

<sup>21</sup> NHS Shetland and Northern Constabulary

- Around 50 people a year in Shetland die of cancer, while the figures for coronary heart disease and strokes are around 20 people a year.
- For the past three years, around 3 people a year have died as a result of a car accident in Shetland.
- Suicide rates have decreased over the last three years.
- With all these figures, numbers are small, making assessment of trends difficult.

### Drug and Alcohol Misuse

- Shetland has fewer people misusing drugs than the national average, though levels are comparable with the other islands.
- There was a 17% increase in the number of individuals who reported to the Community Drugs Team, who classed themselves as 'problem' drug users in the year 2005-06, on the previous year<sup>22</sup>, to 150.
- Heroin remains the main problem drug<sup>23</sup>, but the year 2005-06 saw a decrease from 42% to 33%. However valium as the main problem drug has increased from 5% to 25% and Cocaine and Crack from 12% to 33%.
- The average age clients started using has fallen to 12.9 years old for male young people who were first time clients in 2004/05, 12.8 years old for female young people (age of starting using was 14 in 03/04), and this compares to Scotland where the majority started using between ages 15 and 19 but 39% started using under the age of 15 years<sup>24</sup>.
- There has been approximately one drug related death in Shetland in most years from 1996 to 2004<sup>25</sup>.
- In a recent Shetland survey of 820 10-18 year olds: 8% were smokers; 50% were drinkers and 10% were drug takers<sup>26</sup>.

### Mental Health

- Recent research into deprivation and social exclusion found that 75% of respondents who are deprived and/or socially excluded experienced anxiety and depression. This was found to be as a result of the daily pressures of making ends meet and feelings of isolation. Some living with deprivation were reaching crisis point, with serious mental health issues, suicidal thoughts and/or a dependency<sup>27</sup>.
- The number of young people being referred to or presenting themselves at the SYIS in relation to self-harm has increased in recent years<sup>28</sup>.

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<sup>22</sup> Shetland Community Drugs Team Annual Report 2005-06

<sup>23</sup> By new service user of Community Drugs Team

<sup>24</sup> Shetland Community Drugs Team

<sup>25</sup> Drug related deaths are identified as all deaths involving drugs or persons known or suspected to be drug-dependant

<sup>26</sup> Young Person's Drugs Worker, Research Study, July 2006

<sup>27</sup> Research into Deprivation and Social Exclusion in Shetland, 2006

<sup>28</sup> Shetland Youth Information Service

## EDUCATION

**Attainment levels in schools are high, with 45% of pupils going on to higher or further education and a similar number into employment.**

**However, this is not the circumstance for all young people in Shetland and it is estimated that 2500 working age adults in Shetland have literacy needs. For those without suitable skills for employment barriers to learning include access, lack of childcare and cost.**

### What is measured

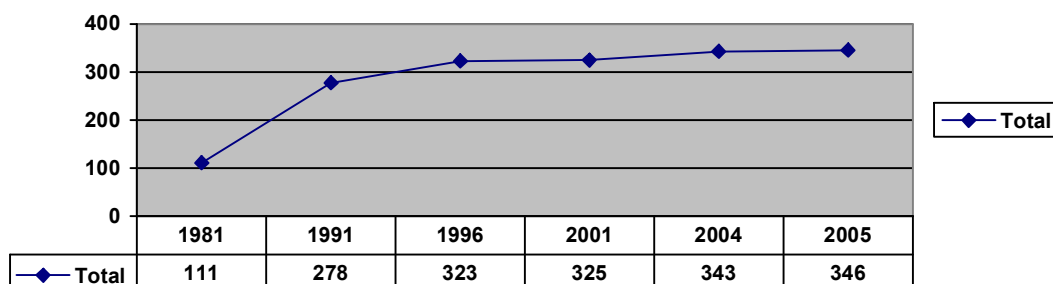
The state of education in Shetland is measured by opportunity (availability of different types of education and participation rates); attainment (of school pupils and estimate of the number of adults with literacy needs); desire to access educational opportunities (from a survey of learning of 55 respondents from across Shetland).

### Opportunity<sup>29</sup>

(See Figure 5-9)

- There are 29 pre-school centres, providing places for all 3 and 4 year olds.
- The nursery school roll has increased slightly since 1996, with efforts to ensure all children were able to attend, if their parents wish them to.

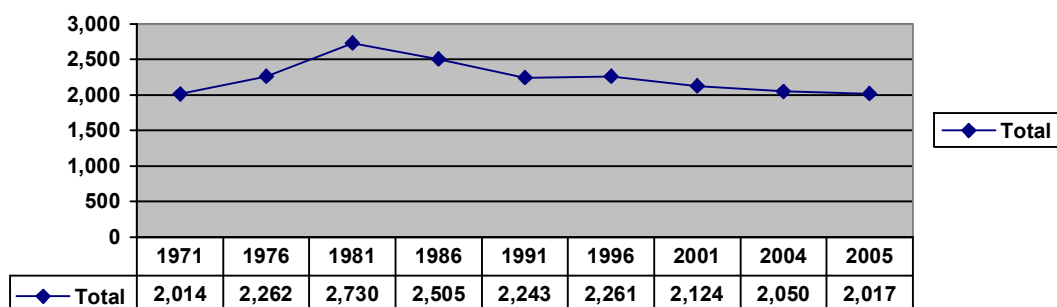
Figure 5: Nursery Education Roll



- There are 33 primary schools, in none of which is the ratio of pupils to available places over 100%.
- The primary school roll in Shetland has seen an overall fall since 1981, to 2,017 in 2005.

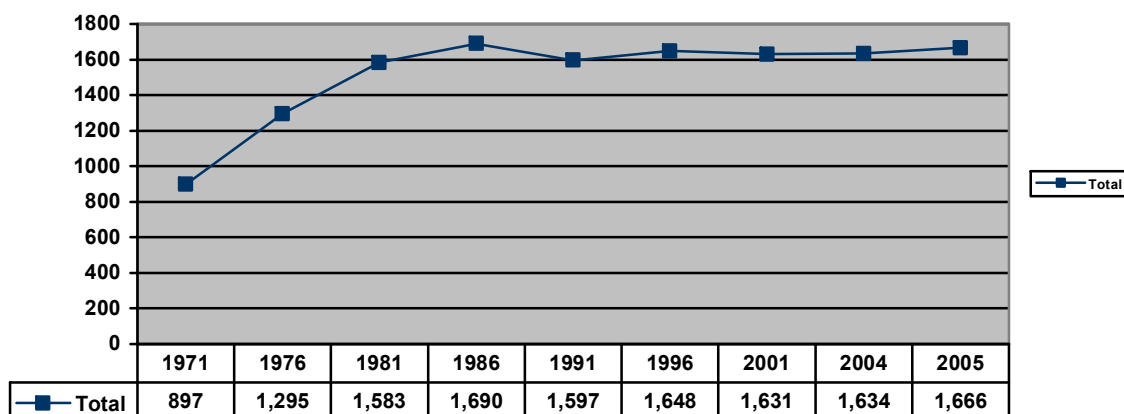
<sup>29</sup> Figures from SIC, Education and Social Work

Figure 6: Primary School Roll, 1971-2005



- There are 9 secondary schools, in none of which is the ratio of pupils to available places over 100%.
- The school roll has been fairly stable over the last 15 years.

Figure 7: Secondary School Roll, 1971-2005



- In 2005-06 adult learning classes were held in 27 locations throughout Shetland. 86 classes were delivered, 1415 people enrolled on classes, 1041 got a place, 265 were unsuccessful and 109 withdrew. Of the participants, 41 were under 18 and 49 had fee waivers.
- There are two further education colleges. The North Atlantic Maritime Centre has experienced a gradual increase in enrolled students, particularly in Maritime Studies. Shetland College also shows an increase in student enrolments, particularly in part-time courses and modern apprenticeships/skillseekers.



Figure 8: Students Enrolled in Shetland College, 1996-7 to 2003-4

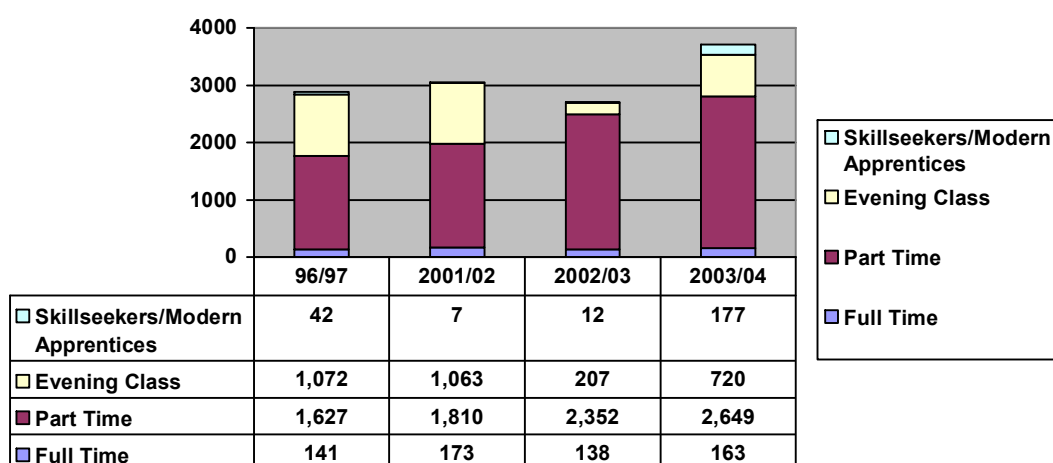
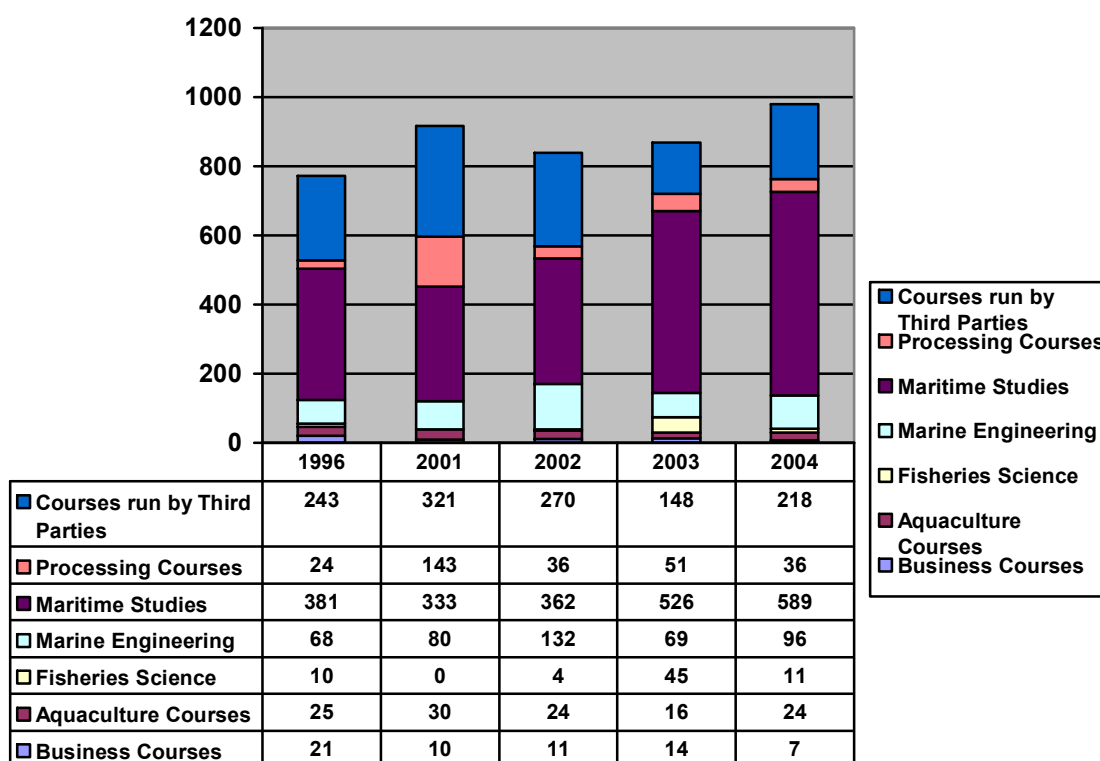


Figure 9: Students Enrolled in North Atlantic Maritime Centre



## Attainment

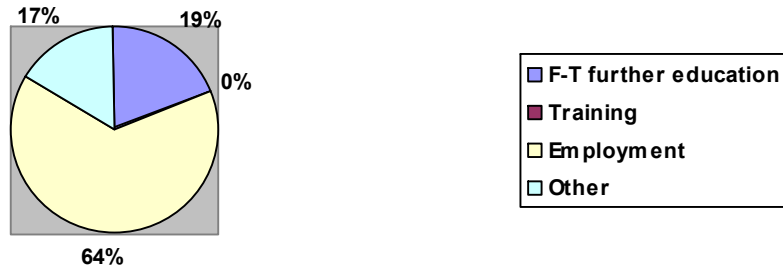
(see Figure 10)

- The Adult Literacy Partnership estimates that approximately 2500 working age adults in Shetland may have literacy needs.
- 77% of primary 3,4,5 and 7 pupils meet or exceed the appropriate 5-14 levels for their age in writing, compared with a Scottish average of 73%.
- 87% of the S4 cohort have attained 5+ awards at SCQF level 4 or better (standard grade), by the end of S6<sup>30</sup>.

<sup>30</sup> Figures from SIC Education

- 38% of the S4 cohort have attained 3+ awards at SCQF level 6 or better (highers), by the end of S6.<sup>31</sup>
- However, 17% of school leavers don't continue with education or find employment.

Figure 10: School Leavers' First Destinations 2003-04



### Desire to access educational opportunities

- In 2004 a survey found the following barriers to learning in Shetland: personal lifestyle; confidence; financial; provision; and motivation<sup>32</sup>
- The survey also suggested that awareness of learning providers and groups in Shetland is not high.
- A recent study into deprivation and social exclusion in Shetland concluded that '*Learning tends to be seen as a luxury: something that people would like to participate in, to improve their employability, for enjoyment, and for confidence, but not a priority. In general access (via transport, childcare or cost) is difficult, although health and self-confidence are also important....[however learning] is very often the single most important factor in assisting people to improve opportunities and access to a better life*<sup>33</sup>.'

<sup>31</sup> Figures from SIC Education

<sup>32</sup> Barriers to Learning Within Shetland Report, Adult Literacy, 2004

<sup>33</sup> Research into Deprivation and Social Exclusion in Shetland, 2006

## CRIME

**In general, crime levels are stable. However, over the last three years there has been an increase in the amount of road accidents and those killed or injured on Shetland's roads.**

**Number of reported incidents of domestic abuse is increasing.**

**Nearly a third of people in Shetland, in 2005, were worried about becoming a victim of crime.**

### What is measured

Crime levels are measured using crime rate figures from Northern Constabulary, whilst fear of crime is measured using a survey undertaken by the Northern Constabulary on a two yearly basis.

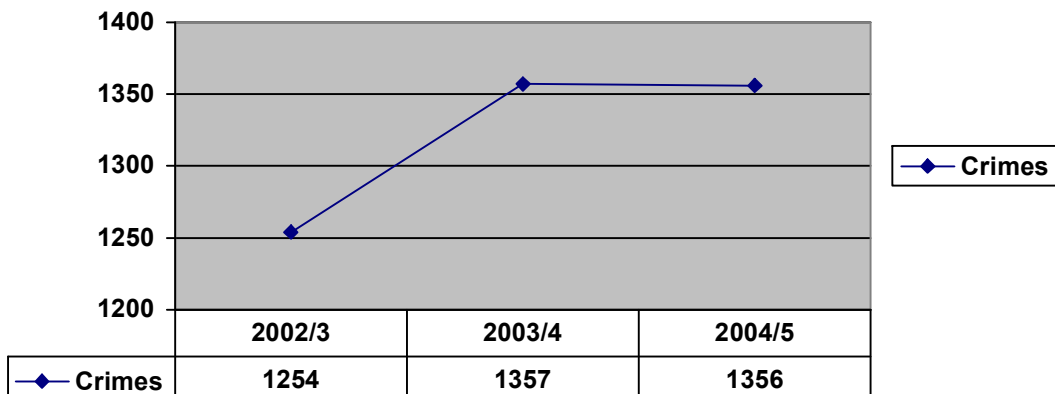
Your Voice is being used to collect further information on people's fear of crime.

### Crime levels

(see Figure 11 and Table 2)

- Number of criminal offences increased by over 100 from 2002-03 to 2003-04. However, in general crime levels in Shetland are fairly stable with low numbers of incidents, particularly for serious crimes, making analysis less meaningful. Crime in Shetland tends to happen in peaks and troughs as it depends on groups of people so there can be a spate of crime.

Figure 11: Total number of criminal offences reported 2002-05



- Over the past three years there has been an increase in shoplifting and incidents of rape.
- Over the same period there has been a drop in the amount of fraud and in the number of people disqualified for drinking over the limit and the amount of reckless driving. However there have been increases in the number of road accidents, including the number of road accidents involving death or injury.

Table 2: Crime rate figures

Crime	2002/3	2003/4	2004/5
Assaults	22	15	20
Rapes	2	1	4
Indecent assaults	2	3	2
Theft by housebreaking	18	16	15
Theft	129	85	125
Theft of motor vehicles	13	18	16
Theft by shoplifting	5	9	21
Fraud	58	54	22
Culpable & reckless fire-raising	3	3	10
Malicious mischief, vandalism etc	224	290	230
Dangerous drugs	91	135	107
Carrying offensive weapons	12	4	20
Petty assault	134	155	167
Breach of the peace	188	206	217
Drunkenness	44	30	47
Reckless & careless driving	32	35	28
Driving when unfit through drink & drugs	2	3	1
Driving with excess blood alcohol	58	58	49
Driving whilst disqualified	6	7	4
Total number of road accidents	145	148	160
Total number of road accidents involving death or injury	27	33	38
Number of persons killed in road accidents	2	3	2
Number of persons seriously injured in road accidents	13	4	8
Number of persons slightly injured in road accidents	24	42	43

- The clear up rate averages between 65% and 70%<sup>34</sup>.
- In 2004 there were 31 reported incidents of domestic abuse, increasing to 53 in 2005<sup>35</sup>. National research shows there are many more cases of domestic abuse than reported.

### Fear of crime

- 30% of respondents (within the Shetland Islands Area Command) were *very worried* or *slightly worried* about becoming a victim of crime. This is a drop from 40.3% in 2003 and compares with 47% of respondents in the Northern Constabulary area as a whole<sup>36</sup>.

<sup>34</sup> Northern Constabulary

<sup>35</sup> Northern Constabulary

<sup>36</sup> Northern Constabulary *Excellence in Community Policing Survey*

## HOUSING

The number of houses in Shetland continues to rise, primarily due to an increase in private housing. However the average price of a house increased 12% in 2005, whilst the number of local authority and housing association properties available has been falling since 2002. This makes it increasingly difficult for first time buyers, whilst the probability of being offered a council house in the area of an applicants choice is low and decreasing in many areas: for example over the last two years there was a 2% chance of getting a council property in Lerwick.

25% of Shetland households are in fuel poverty (nearly double the Scottish average) due to a combination of severe climate, high costs of fuel and poor housing standards, particularly in the private housing stock in remote rural areas.

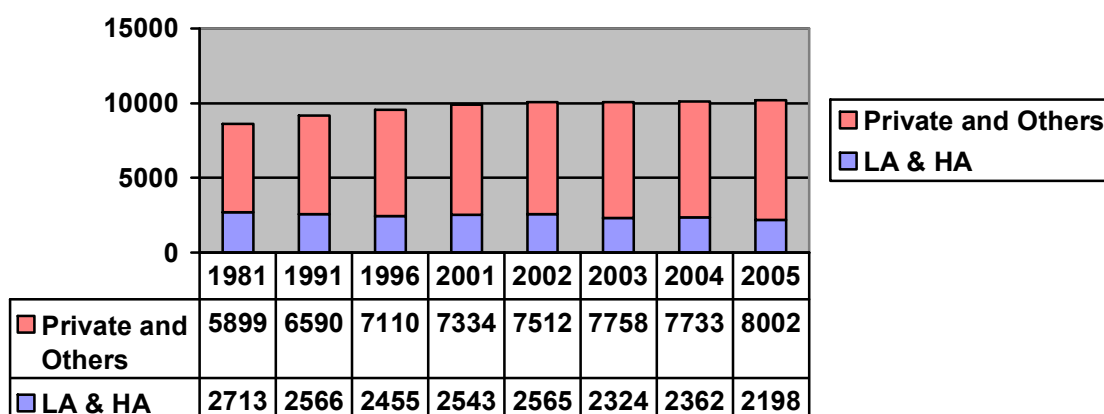
### What is measured

Housing is measured by the quantity of housing available in Shetland (the number of homes and type); quality of housing (from the Housing Condition Survey<sup>37</sup>); and appropriateness and affordability of housing (cost of private housing and local authority rents, compared to average income; the supply versus demand ratio; overcrowding and homelessness figures).

### Quantity of housing

(see Figure 12 and Table 3)

Figure 12: Ownership of Dwelling Houses in Shetland, 1981-2005<sup>38</sup>



- In Shetland as a whole there are 10,200 dwellings, of which 8,002 (78.5%) are private and 2,198 (21.5%) are local authority and housing association<sup>39</sup>. This is a 2% increase since 2001.
- In the last four years (2002-05 inclusive) there has been a 14.3% decrease in the number of local authority/housing association properties and a 6.5% increase in the number of private properties.

<sup>37</sup> Shetland Islands Council's Environmental Health Service recently commissioned a private sector local house condition survey. The final report from this survey is due to be presented to council and published in the near future.

<sup>38</sup> Assessors Office

<sup>39</sup> Assessors Office, 2005

- In 2005 the numbers of planning applications lodged for new houses decreased by 13% from 2004. But the number of applications was still significantly above the levels in every year since 1996, when applications were at their highest due to a number of multiple applications<sup>40</sup>.
- A further breakdown of homes by type shows that the private rental market accounts for 7.27%, in line with Scotland as a whole. The social rental market is 25.83%, slightly lower than the Scottish figure of 27.15%. The number of properties that are owned, at 63.37%, is in line with Scotland as a whole, at 62.59%<sup>41</sup>.

Table 3: Number of homes by type<sup>42</sup>

Tenure	Shetland	Scotland
Total number of households (with residents)	9,111	2,192,246
% Owned	63.37	62.59
% Rented from council	22.88	21.57
% Other social rented	2.95	5.58
% Private rented (unfurnished)	3.67	3.1
% Private rented (furnished)	3.6	3.61
% Living rent free	3.52	3.55

### Quality of housing

- It is estimated that 25% of households in Shetland are fuel poor<sup>43</sup>. This is almost double the Scottish average of 13%. Shetland has the third highest fuel poverty level in Scotland, with Orkney and the Western Isles at 31% and 34% respectively<sup>44</sup>.
- 47% of households in Shetland had difficulties in heating their home<sup>45</sup>. It is thought this is mainly due to a combination of poor weather and high fuel costs along with the need to make improvements to the energy efficiency of homes, particularly in the private sector.
- The social rented stock in Shetland is of a high standard<sup>46</sup>.
- Professional opinion is that homes in the private sector are likely to be in poorer condition, particularly in remote communities. The Shetland house condition survey will provide more information on private sector homes, including the numbers of Below Tolerable Standard properties, the incidence of Fuel Poverty and various levels of repair costs.

### Appropriateness/ Affordability of housing

(see Table 4, Figure 13 and 14)

- 299 private properties were sold in Shetland in 2005, an increase on 10 from 2004. There was a 12% increase (£8,127) in the average price and

<sup>40</sup> Review of Housing and the Shetland Economy 2005

<sup>41</sup> Census, 2001

<sup>42</sup> Census, 2001

<sup>43</sup> A household is in fuel poverty if, in order to maintain a satisfactory heating regime, it would be required to spend more than 10% of its income on all household fuel use, where 'satisfactory heating regime' is defined as one that achieves 21° C in the living room, and 18° C in other occupied rooms

<sup>44</sup> Scottish House Condition Survey, *Fuel Poverty in Scotland*, 2004

<sup>45</sup> Scottish House Condition Survey, *Fuel Poverty in Scotland*, 2004

<sup>46</sup> Scottish Housing Quality Standard submissions from SIC Housing, 2004

many houses throughout Shetland sold for higher than valuation with an average premium of £3,570 or 4%<sup>47</sup>.

- The price of land is also going up with house sites in the central mainland selling for as much as £40,000.
- The average income of households in Shetland is just under £33,000<sup>48</sup>

**Table 4: Average sales prices for private property in Shetland by area**

Area	1999	2000	2001	2002	2003	2004	2005
Outer Isles	£10,200	£22,000	£27,550	£18,550	£0	£30,050	£0
North Isles	£27,559	£26,077	£24,389	£35,610	£40,500	£37,730	£46,556
West Mainland	£37,112	£42,245	£42,577	£30,684	£62,278	£66,084	£71,498
South Mainland	£39,318	£42,880	£41,753	£41,342	£49,073	£66,911	£70,975
North Mainland	£39,601	£54,172	£46,843	£61,780	£55,131	£56,539	£60,437
Central Mainland	£54,328	£65,268	£59,324	£73,849	£78,557	£75,595	£86,253
Lerwick	£63,933	£66,518	£65,531	£71,717	£75,078	£82,159	£83,971
Shetland	£50,748	£54,657	£54,587	£61,945	£66,623	£67,600	£75,727

- It is generally recognised that external forces are driving the housing market, with people from the UK mainland wishing to move to Shetland. A fall in the house market in the UK may, therefore, have a knock-on effect on the Shetland market. This would largely be dependent on potential interest rate increases that those in the industry do not see as a serious threat in the near future<sup>49</sup>.
- It is increasingly difficult for first time buyers to purchase their first home. However, applications for council housing from first time buyers have fallen over the last few years down to 5-10% of all applications in the year. It is thought that first time buyers are increasingly looking at self builds, mainly on land that family and friends currently own, and in the more rural areas of Shetland.
- Mortgage rates have remained low over the past year and are expected to stay that way for the foreseeable future. The industry believes that it would take a considerable increase in rates to have any significant impact on the housing market in Shetland.
- The majority of applications for mortgages come from Lerwick (as much as 50% of total applications). 20% of applications are for properties in the Central Mainland, 10-15% in the North Mainland, with the same percentage in the South Mainland. Levels of applications decrease in more remote areas.
- At present there is no evidence of negative equity with the value of property continuing to rise and mortgage rates remaining low. This may become an issue in the future if interest rates rise significantly and the demand for property declines<sup>50</sup>.
- The Council's rent levels increase to cover inflation only.

<sup>47</sup> Review of Housing and the Shetland Economy 2005

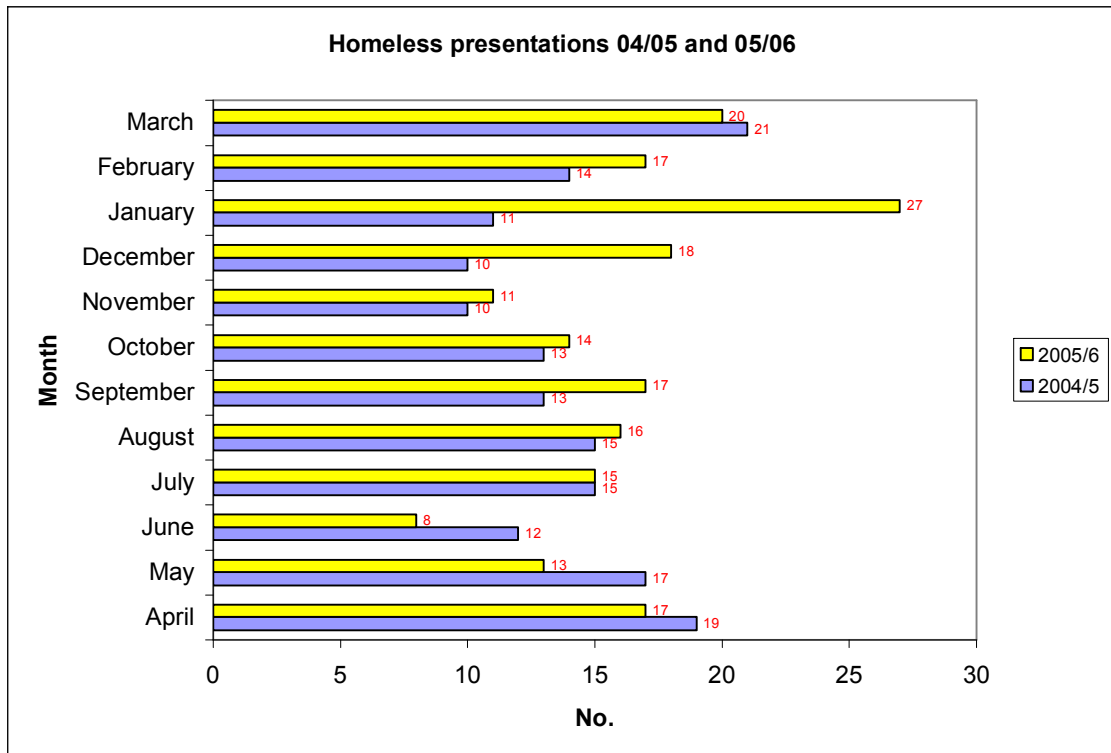
<sup>48</sup> Shetland Face to Face Household Survey

<sup>49</sup> Review of Housing and the Shetland Economy 2005

<sup>50</sup> Review of Housing and the Shetland Economy 2005

- The opportunity to be housed by the council in the area of an applicant's choice varies across Shetland. For example applicants for housing in Lerwick had only a 2% probability of being offered a council house (July '04-March '06), whilst in rural areas such as Vidlin, Whalsay – Brough and Firth the probability is 70% or more. In Fetlar, Burravoe and Uyeasound there is more than 100% probability, due to the number of voids<sup>51</sup>.
- However, in some country areas, such as Scalloway-Blydoit; Whiteness; Tresta; Aith; Sullom; parts of Brae; Out Skerries and Fair Isle there was a 0% chance of getting a council property as no properties became available during July '04-March '06.
- Both Shetland Islands Council and Hjaltland Housing Association have a significant number of applicants currently on the waiting list with points under the categories of Overcrowding and Sharing Amenities.
- There were 170 homeless presentations in 2004/5, rising to 193 in the year 2005/6. There are more presentations in the winter months than summer.

Figure 13: Homeless presentations<sup>52</sup>



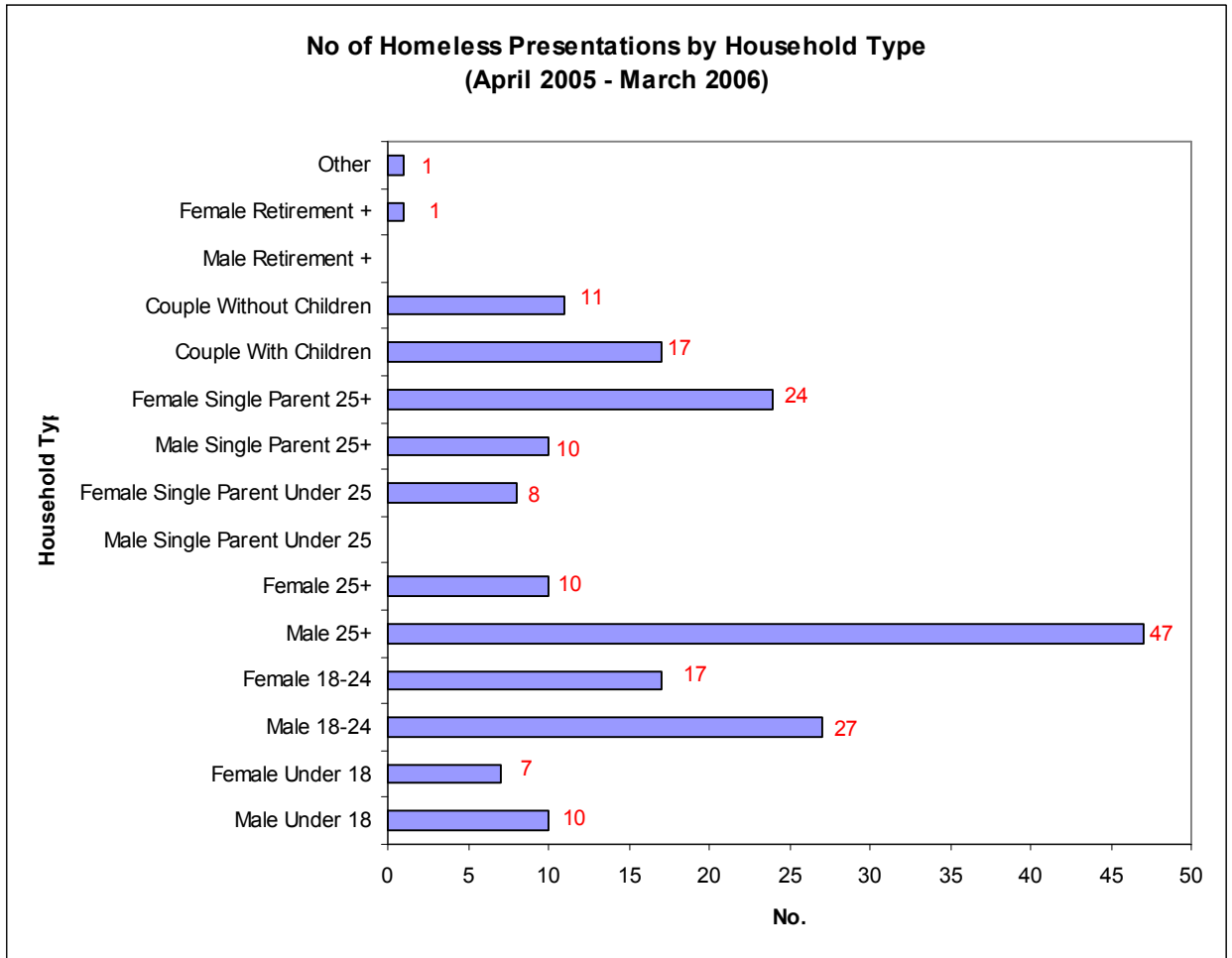
- The biggest group to become homeless are men above the age of 25 (24.4%), whilst 59 (30.6%) involve children.

<sup>51</sup> Average of the statistical probability of being offered any type of SIC accommodation between July 04 and March 06 (based on number of void properties and number of times each area was selected)

<sup>52</sup> SIC Housing



Figure 14: Homeless presentations by household type



## TRANSPORT AND COMMUNICATIONS

**Vehicle ownership and inter-island ferry and bus usage in Shetland continues to rise, as does usage of external air and sea routes.**

**Community involvement in the development of Shetland's Regional Transport Strategy suggests the need for an increase in the availability of public transport.**

### What is measured

Availability, accessibility, usage and cost of internal transport is measured by the numbers of private cars, taxis, buses and ferries; number and frequency of bus and ferry routes; cost of internal transport journeys and usage levels for internal transport.

Availability, usage and cost of external transport is measured by number of external air and sea routes; cost of external transport journeys; and usage levels for external transport.

Measures for electronic communications are under development.

### Availability, accessibility, usage and cost of internal transport (see Table 5 and Figure 15)

- The numbers of private cars and light goods vehicles in Shetland has increased by 8.2% from 2001 to 2004, to 11,697<sup>53</sup>. Car ownership has doubled since 1976.
- The number of taxis has remained stable at around 76, over the past five years<sup>54</sup>.
- The number of bus passengers has increased 2.7% over the past 5 years, from 383,360 in 2001 to 393,892 in 2005<sup>55</sup>. The Scalloway/ Burra bus service has increased from 42,154 in 2001 to 54,302 in 2003, which is a 33% increase.

Table 5: Bus services usage

Route	2001	2002	2003
South Mainland	92758	91941	93797
North Mainland	73240	74141	71116
Laxo/ Vidlin	6977	7468	7881
West Mainland	44018	45533	41982
Scalloway/ Burra	42154	48983	54302
Lerwick Town Service	117639	115916	113039
Yell	4936	4788	4653
Unst	1638	1536	1950
<b>Total</b>	<b>383360</b>	<b>390306</b>	<b>388720</b>

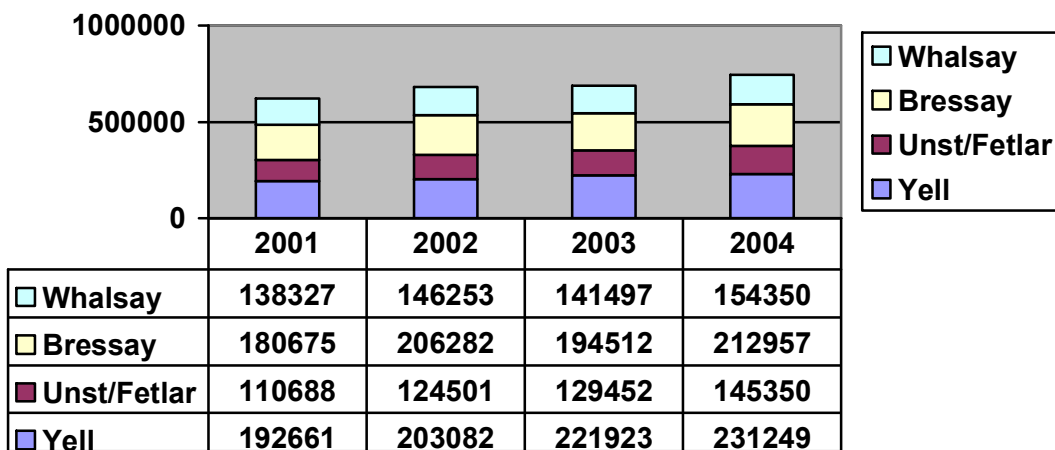
<sup>53</sup> Department of the Environment, Transport and the Regions

<sup>54</sup> SIC Transport

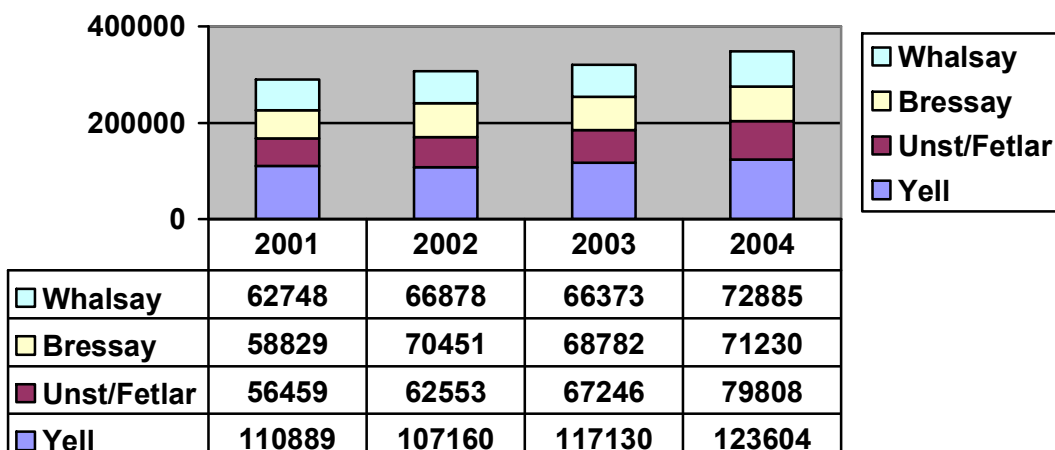
<sup>55</sup> Shetland in Statistics

- The number of vehicles and passengers on the inter-island ferries (figures exclude Outer Isles) has also increased from 2001 to 2004. The total number of passengers has increased by 18% from 622,351 in 2001 to 753,123 in 2004. The Unst/Fetlar crossing in particular has increased from 110,688 in 2001 to 145,350 in 2004, an increase of 24%. The total number of vehicles has increased 20%, from 278,925 in 2001 to 350,177 in 2004. Vehicles on the Bressay crossing in particular have increased from 58,829 in 2001 to 71,230 in 2004, an 18% increase<sup>56</sup>.

Figure 15: Inter-Island ferry usage  
Passengers



#### Vehicles



- The cost of internal transport journeys by bus range from £4.20 for a return trip between Sumburgh and Lerwick, to £6.10 for a return trip between Sandness and Lerwick, and £8.80 for a return trip between Haroldswick and Lerwick<sup>57</sup>.

<sup>56</sup> SIC Transport

<sup>57</sup> Transport Department, SIC

- A recent study into deprivation and social exclusion in Shetland concluded that *'The greatest issue in terms of access in Shetland is people's inability to afford to run a car (or two cars if a partner has the car each day). Although the public transport system is appreciated, it delivers for full-time commuters and is not able to alleviate access issues for those without a car sufficiently for people to feel they are able to access opportunities. This restricted people's ability to learn; find employment or better employment; purchase more healthy food at a reasonable cost; take part in community events and access social opportunities, for example. Reliance on others for transport is common, hindering people's feeling of independence and increasing humiliation.*

*This form of exclusion is predominantly felt by women with family responsibilities, particularly those living in remote areas of Shetland, young people, and those with a disability. For the former, lack of childcare and transport to access childcare in other areas augments isolation. For the latter the situation can be particularly acute as they are physically unable to access any public transport.*<sup>58</sup>

### Availability, usage and cost of external transport (see Table 6 and 7, Figure 16-18)

- Flights to Sumburgh operate to and from Aberdeen, Edinburgh, Glasgow, Inverness, Kirkwall and Fair Isle. In 2006, a direct service to London Stansted was scheduled to operate between June and October. There are connections through Aberdeen, Inverness, Edinburgh and Glasgow to many UK destinations including London (Heathrow & Gatwick), Birmingham and Manchester.
- There are five daily services to Aberdeen from Sumburgh, two daily flights to Edinburgh, 1 daily flight to Glasgow and 2 to Inverness, via Orkney<sup>59</sup>.

Table 6: Typical costs for return flights from Shetland to Scottish Mainland according to the length of time booked ahead, including figure with air discount scheme applied in brackets<sup>60</sup>

Sumburgh to....	Aberdeen	Edinburgh	Glasgow	Inverness	Orkney
1 day	£262.50 (£174.10)	£236.00 (£157.60)	£216.00 (£145.60)	£119.80 (£87.80)	£89.80 (£69.80)
1 week	£193.50 (£132.70)	£171.00 (£118.60)	£335.90 (£225.50)	£145.80 (£103.40)	£79.80 (£63.80)
1 month	£153.50 (£117.70)	£191.00 (£130.60)	£194.00 (£132.40)	£145.80 (£103.40)	£79.80 (£63.80)
6 months	£123.50 (£99.70)	£146.00 (£103.60)	£174.00 (£120.40)	£119.80 (£87.80)	£79.80 (£63.80)
11 months	£104.50 (£81.70)	£146.00 (£103.60)	£174.00 (£120.40)	£119.80 (£87.80)	£79.80 (£63.80)

- There is an airport at Scatsta operated by the oil industry, and this has seen an increase in passengers from 15,000 in 1991 to 247,000 in 2001.
- Total passenger numbers at Sumburgh Airport have fluctuated over the years. In 1991 the airport had 474,000 passengers but in 2001 this had

<sup>58</sup> Research into Deprivation and Social Exclusion in Shetland, 2006

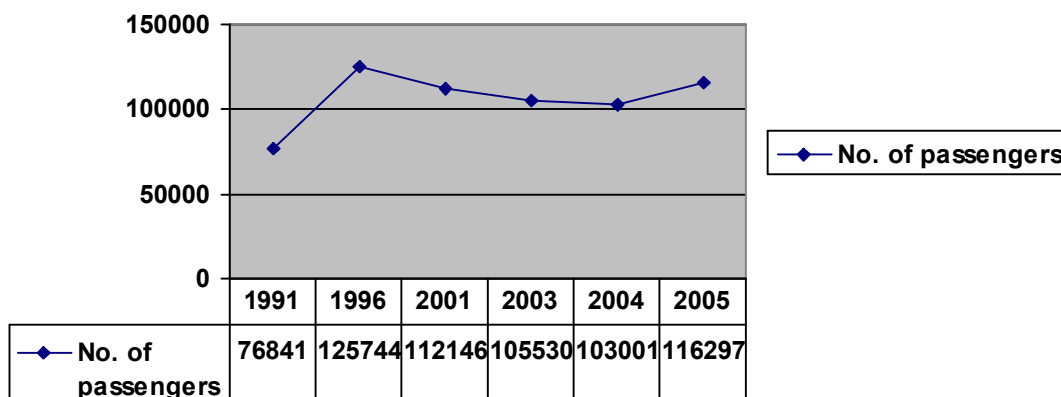
<sup>59</sup> British Airways website, Summer 2006

<sup>60</sup> British Airways, August 2006, cost for being away for a week

reduced to 168,000 passengers. This is due to the decline in helicopter passengers through the airport, which declined from 214,000 in 1991 to 18,000 in 2001. Fixed Wing Scheduled passengers have actually increased from 77,000 in 1991 to 116,297 in 2005<sup>61</sup>.

- The impact on of the air discount scheme on passenger numbers has yet to be assessed.

Figure 16: Sumburgh airport passengers

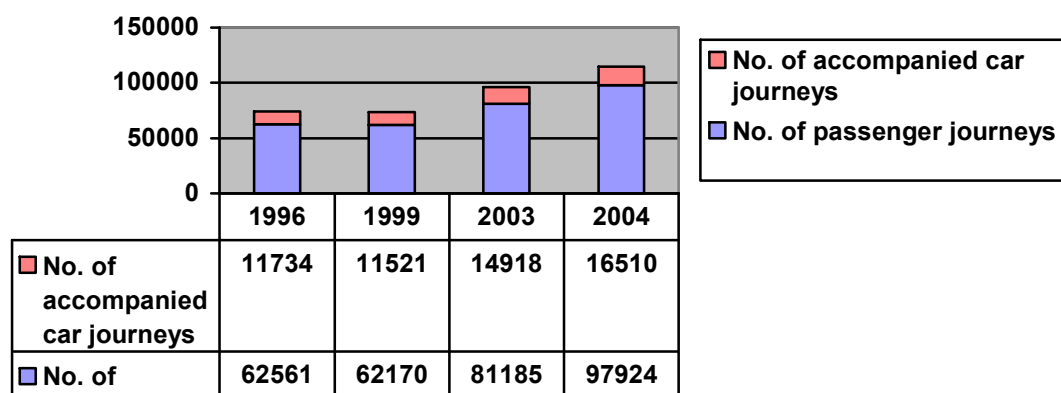


- Sea journeys to Aberdeen are cheaper than trips by air, particularly if a cabin is not booked, for example, £20.40 compared to £98.78 on a trip to Faroe/ Bergen, a difference of £78.38<sup>62</sup>.

Table 7: Cost of sea journeys

	Cost for a family of 4, with cabin, high season	Cost for 1 adult, no cabin, low season
Aberdeen	£175.90	£20.40
Faroe	£355.61	£98.78
Bergen	£355.61	£98.78

Figure 17: P&O and Northlink passengers



- Ferry fares between Aberdeen and Lerwick vary by the season and generally range from £20 to £30 for adults (single passage) and £10 to £15

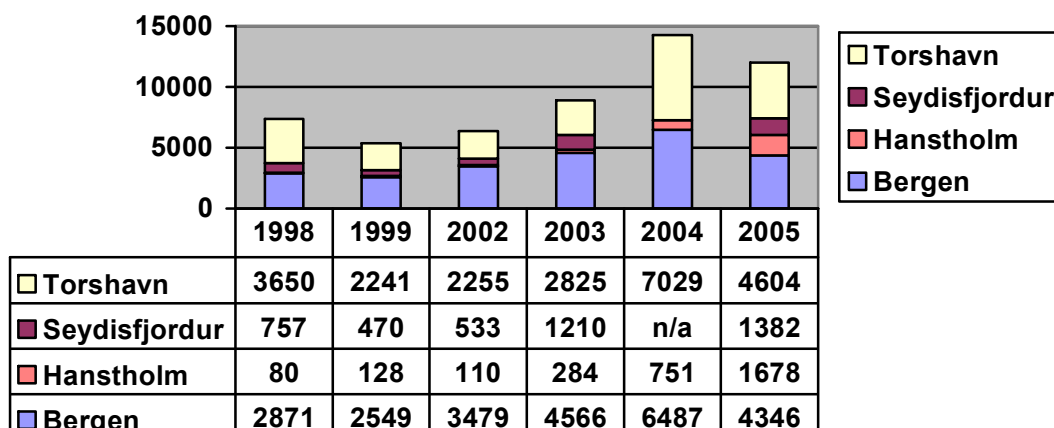
<sup>61</sup> Shetland in Statistics

<sup>62</sup> Northlink and Smyril Line

for children (aged 5-15). Infants travel for free. Cars cost between £80 and £110 (single passage). Cabins cost between £70 and £102 (single passage), although cheaper berths in shared 2- and 4-berth cabins are also available.

- The number of accompanied car journeys on the Lerwick-Aberdeen route has increased in recent years, from 11,521 in 1999 to 16,510 in 2004, a 31% increase<sup>63</sup>. The number of passenger journeys has grown even more dramatically, from 62,170 to 97,924, a rise of more than 57%.
- There has been a steady increase in the number of passengers to and from Shetland on Smyril Line, from 1999 to 2004, with a decrease in 2005.

Figure 18: Smyril Line passengers, inbound and outbound Lerwick, 1998-2005



<sup>63</sup> Shetland in Statistics

## NATURAL RESOURCES

**Existing data available to measure the quality of the environment in Shetland, such as air and water quality, paint a good picture. However, further measures are required to ensure the situation is fully understood.**

### What is measured

The quality of the natural environment is measured by air and coastal water quality (fresh water results require further analysis to produce a useful indicator); marine and terrestrial litter (with figures for marine litter available next year<sup>64</sup>), biodiversity and climate change (source of data to be identified). Measures for the built environment (in particular land and sea use) and consumption (all waste produced, water consumption and energy consumption) are still to be identified.

### Natural environment (see Table 8 and 9)

- Shetland's air quality meets all the criteria set by the national air quality standards.

### Table 8: Pollutant objectives outlined in the NAQS

- Coastal Water Quality Standards Criteria are set in bandings between A and D, with A as the highest quality and C and D representing unsatisfactory results. Most of Shetland's coastline is A, with improvements in general quality from 2004 to 2005 and a decrease in the amount of unsatisfactory coastal areas in Shetland.

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<sup>64</sup> Amenity Trust, Voar Redd Up

**Table 9: Coastal water quality standards, figures from SEPA**

All waters Class A unless otherwise classified (most of Shetland's coastline)

	Class	2005	2004
Total Length (km)	B	48.1	44.5
Total Length (km)	C	4.2	5.2
Total Length (km)	D	0.2	0.2

- A cleanliness index monitoring system is used to measure terrestrial litter, where a higher score represents a better result<sup>65</sup>. In 2004/05 Shetland's score was 76, an increase from 75 in 2005/06.
- Initial indicators to measure biodiversity have been identified<sup>66</sup>:
  - trends in populations and productivity of seabirds, croftland and moorland birds;
  - seals;
  - marine fish (probably shellfish and perhaps other taxa);
  - marine benthos (probably impacts of aquaculture);
  - condition of protected natural heritage sites;
  - extent of land managed under agri-environment schemes;
  - trends in grazing pressure;
  - trends in area of cropped land;
  - changes in phenology (timing of biological events) in relation to climate change;
  - energy consumption;
  - waste (production, management and recycling)

### Shetland's consumption of global resources

The ecological footprint is a sustainability indicator, which expresses the relationship between humans and the natural environment. The ecological footprint accounts for the use of natural resources by a region's population. It is a 'snapshot' measure and typically refers to average annual consumption. To indicate environmental sustainability, the ecological footprint (demand) is compared with the global availability of resources (supply). Results are usually presented on a per capita basis using a standardised unit of area - the global hectare (gha). The average amount of resources available per capita is known as an 'earthshare'. To calculate an earthshare, the total available land and sea area of the planet is divided equally among the current global population. It is estimated that the current earthshare is 1.9 gha. If everyone lived within their earthshare, we would achieve One Planet Living with an equitable sharing of resources.

Shetland's ecological footprint is currently 5.39 global hectares per capita<sup>67</sup>. In comparison in 2001, Scotland's residents' ecological footprint was 5.35 gha per capita. If everyone on the planet consumed as much as an average Shetland resident, an additional 1.8 Earths would be required to sustainably support global resource consumption.

<sup>65</sup> SIC, Waste Services

<sup>66</sup> Work is being done to develop results for this year. Various bodies and agencies including SEPA, SNH, SEERAD, Shetland Biological Records Centre, SOTEAG and the NAFC Marine Centre will be involved.

<sup>67</sup> This measures the amount of nature's resources Shetland consumes in a given year



## ECONOMY

**The Gross Regional Domestic Product per capita of Shetland is £15,245, compared to £18,515 for the UK. Fisheries output, oil and the Council remain the three largest sectors in the economy, considerably higher than agriculture, tourism and knitwear.**

**85.2% of the working age population is in employment, with the public sector dominating. 14% of household income is derived from self-employment, compared to 8% for Scotland as a whole.**

**New business start-ups have been fairly steady over recent years, at around 30 per annum.**

### What is measured

The state of the economy in Shetland is measured by the level of economic activity in Shetland (overall GDP, public and private sector spending and the value of key sectors); employment (number of jobs, employment rates, employment by sector; percentage of people out of work for more than a year; percentage of women economically active; and percentage of people in permanent training); and business performance (number of new business start-ups; number and scale of business failures; and business profitability).

### Economic activity

(see Figure 19)

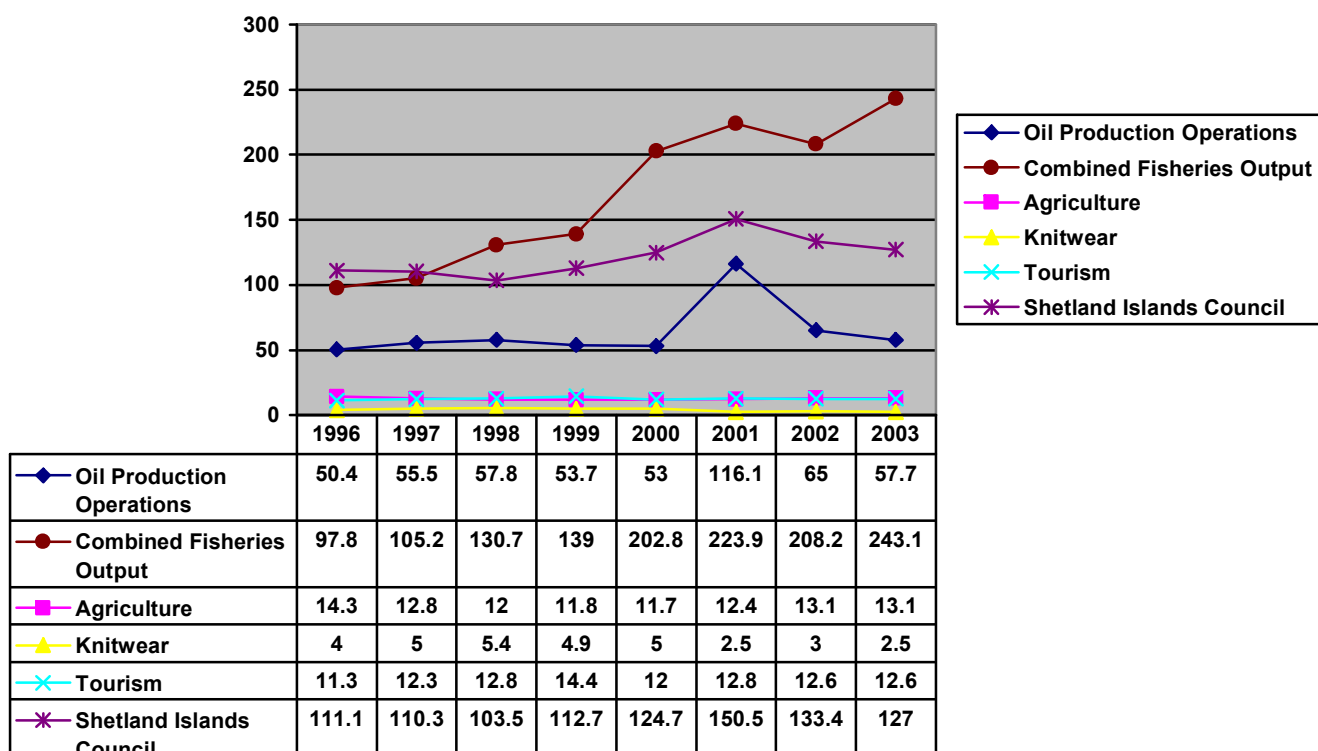
- The combined total output of all economic sectors in the Shetland economy in 2005 was calculated to be £705,705,000<sup>68</sup>. The same survey calculated Shetland's Gross Regional Domestic Product to be £333,403,150. This equates to a GRDP per capita of £15,245<sup>69</sup>.
- This compares with a GRDP per capita for the UK of £18,515 and Guernsey of £23,769, in 2003.
- In 2003 the value of the Shetland economy was £456mn. Combined fisheries output was the largest sector, with £243.1 million (fish catching, fish processing and salmon farming), continuing to rise since at least 1996. The council is the third largest sector, after oil, with a value of £127 million, decreasing from a high of £150.5 million in 2001. In contrast, the economic output of traditional agriculture and knitwear industries are much lower and fairly stable at £13.1 and £2.5 million respectively. The value of tourism has also been fairly stable, 1996-2003.
- During 2000, Shetland accommodated 65,652 visitors, with a total visitor expenditure of just under £12 million. 31% of all visitors were here on business<sup>70</sup>.

<sup>68</sup> Economic survey, University of Aberdeen Business School and AB Associates Ltd, 2005

<sup>69</sup> Shetland Regional Accounts, 2005

<sup>70</sup> Visitor Survey, 2000

Figure 19: Value of key sectors of the Shetland Economy, 1996-2003<sup>71</sup>



## Employment

(see Figure 20 and Table 10)

- During the past 30 years, Shetland has benefited from one of the lowest unemployment rates in the country. In June 2005, 1.8% of Shetland's economically active population was unemployed, compared to the Scottish average of 2.8%.
- As of May 2006, 25 people had been out of work for more than a year. This equates to 11.3% of all people seeking Job Seekers Allowance<sup>72</sup>.
- In 2003 12,270 jobs were recorded in Shetland, equal to 9,199 Full Time Equivalents (FTEs)<sup>73</sup>, with 11, 200 people in employment<sup>74</sup>, 85.2% of the total population.
- Public administration is the sector with the largest number of employees, with 3,402 employees, 27.7% of the total. The sectors with the next highest numbers of employees are wholesale & retail and education, health & social work with 11.7% and 11.5% respectively. Only 0.9% are employed in agriculture<sup>75</sup>.
- As of May 2006, 83.4% of working age women are economically active, compared to the Scottish average of 75.2%.

<sup>71</sup> Fraser of Allander Institute

<sup>72</sup> Official Labour Market Statistics, May 2006

<sup>73</sup> 2003 Employers Survey, SIC

<sup>74</sup> Official Labour Market Statistics, May 2006

<sup>75</sup> 2003 Employers Survey, SIC

- Shetland also has a higher percentage deriving income from self-employment than Scotland as a whole and much lower percentage from social security benefits.

Figure 20: Employment by sector<sup>76</sup>

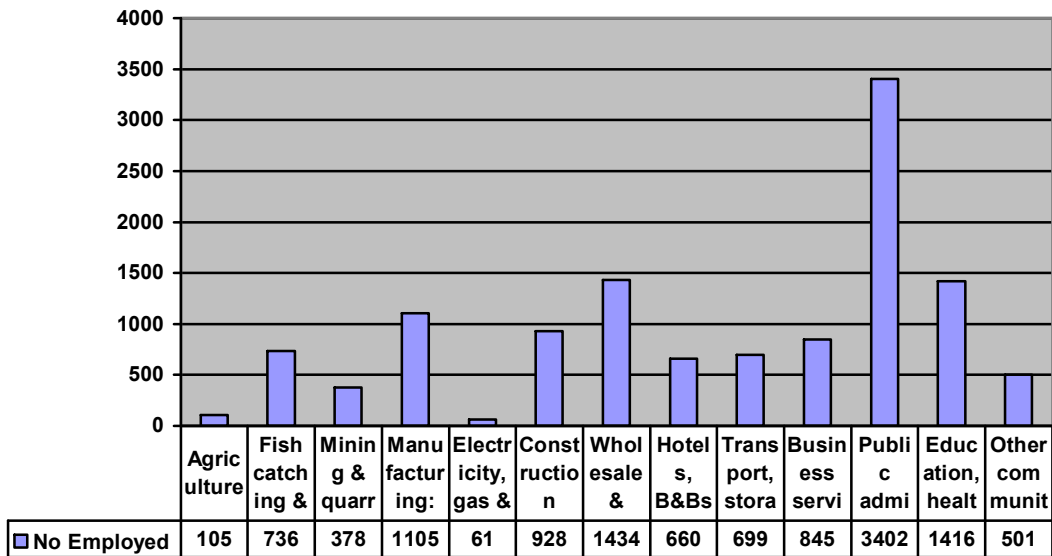


Table 10: Sources of household income

	Shetland <sup>77</sup> 2003, %	Western Isles <sup>78</sup> 2003, %	Scotland <sup>79</sup> 2003/4, %
<b>Wages and Salaries</b>	68	70	65
<b>Self Employment</b>	14	8	8
<b>Investments</b>	5	1	2
<b>Pensions</b>	11	14	13
<b>Social Security Benefits &amp; other</b>	2	7	12
<b>Total</b>	100	100	100

### Business performance

- There were 32 new business start-up in the financial year April 2005-March 2006<sup>80</sup>. This is fairly steady year on year.
- There is currently no information available on number and scale of business failures and data is awaited on business profitability.

<sup>76</sup> 2003 Employers Survey, SIC

<sup>77</sup> Shetland Face to Face Household Survey

<sup>78</sup> Roberts, D. (2005) The Western Isles Regional Accounts 2003, University of Aberdeen

<sup>79</sup> Office of National Statistics, Family Resources Survey 2003/4

<sup>80</sup> Shetland Enterprise, 2006 (advice and /of funding assistance)

## SOCIAL WELFARE

The average wage level in Shetland is higher than the Scottish average, although this is not the case for women, whilst the cost of living is higher, particularly for essential items. This makes it particularly difficult for those on low income and/or national benefits, whilst uptake of national benefits is felt to be lower than entitlement.

Fuel poverty remains high and decreasing numbers of registered child minders is restricting people's access to learning and employment opportunities.

### What is measured

Assessment of social welfare in Shetland is measured by the cost of living, average wage levels and average benefit levels; the percentage of families in fuel poverty; the availability of childcare; and pension arrangements available.

### Social welfare

(see Figure 23-25)

- The average income of households in Shetland is just under £33,000, or £2750 a month (gross)<sup>81</sup>. Households with children had the highest average income, over £48,000; households without children had an average income of over £36,000; and retiree households, unsurprisingly, had a much lower level of average income, just over £15,000<sup>82</sup>. High-income averages can mask poverty and make this more difficult to identify and tackle<sup>83</sup>.
- Shetland's average wage levels are above the Scottish average: the Shetland average of all full-time workers is £448.40 gross weekly pay compared to the Scottish average of £392.70. However female full-time workers earn slightly less gross weekly pay than the Scottish average. The hourly pay of full-time workers is slightly less in Shetland than the Scottish average<sup>84</sup>.

Figure 23: Median earnings in pounds, 2004

	Shetland (pounds)	Scotland (pounds)
<b>Gross weekly pay</b>		
<b>All full-time workers</b>	448.4	392.7
<b>Male full-time workers</b>	457.5	432.2
<b>Female full-time workers</b>	342.3	345.5
<b>Hourly pay</b>		
<b>All full-time workers</b>	9.7	9.9
<b>Male full-time workers</b>	10.1	10.4
<b>Female full-time workers</b>	9.3	9.2

<sup>81</sup> Shetland Face to Face Household Survey

<sup>82</sup> Shetland Regional Accounts 2003

<sup>83</sup> Research into Deprivation and Social Exclusion in Shetland

<sup>84</sup> Annual Survey of Hours and Earnings, reported as part of the Official Labour Market Statistics (2005)

- A recent study shows that mean expenditure for 26 categories of household expenditure in Shetland, totalled £1203.77 per month or £14,445 per annum. Of this monthly expenditure housing costs total £99.79<sup>85</sup>.
- The cost of living in Shetland is higher than in Orkney and the Western Isles; however, Shetland's total cost of living is only 0.3% higher than the Scottish average. Aberdeen, Orkney, and the Western Isles all have lower cost of living percentages than the Scottish Urban Average<sup>86</sup>.
- However essential items such as food are considerably higher than the Scottish Urban Average whilst housing and motoring expenses are lower, keeping the overall cost of living lower than the Scottish average.
- The cost of essential items makes it more difficult for households on national benefit to make ends meet than in other parts of the country<sup>87</sup>.

Figure 24: Cost of living (figures presented as percentages)

	<b>Food</b>	<b>Housing</b>	<b>Other Goods &amp; Services</b>	<b>Motoring Expenditure</b>	<b>Road Fuel</b>	<b>Total</b>
<b>Shetland</b>	117.0	83.4	104.2	92.1	95.7	100.3
<b>All Scotland</b>	108.2	86.2	99.3	84.3	106.3	97.7
<b>Scot. Urban Av.</b>	100.0	100.0	100.0	100.0	100.0	100.0
<b>Aberdeen</b>	102.7	88.1	98.9	92.9	101.9	96.8
<b>Orkney</b>	119.0	79.2	93.5	84.3	94.5	96.4
<b>Western Isles</b>	121.2	81.1	102.6	91.6	95.2	99.9

- Shetland continues to have a low percentage of the working age population claiming key benefits, when key benefits are defined as Job Seekers allowance, at 2% of the population<sup>88</sup>. The rate of those eligible may be higher as the complicated national benefit system is a hindrance to people claiming benefits<sup>89</sup>.
- More than two-thirds of those claiming job seekers allowance are male and nearly three quarters have been claiming for less than 6 months.

<sup>85</sup> Shetland Regional Accounts 2005

<sup>86</sup> Rural Scotland Price Survey 2003

<sup>87</sup> Research into Deprivation and Social Exclusion in Shetland

<sup>88</sup> JobCentre Plus, May 2006

<sup>89</sup> Research into Deprivation and Social Exclusion in Shetland

Figure 25: Job seekers allowance claimants

	Shetland (numbers)	Shetland (%)	Scotland (%)
All people	270	2.0	3.0
Males	189	2.6	4.4
Females	81	1.3	1.5

- Recent research into deprivation and social exclusion in Shetland concludes, in relation to income and employment that *‘Despite the apparent absence of poverty in Shetland, a large number of people are in debt and a significant number are struggling to make ends meet. The relatively high cost of living for essential items means that nationally decided benefit levels do not go so far. The complexity of the national benefits system alongside the distances involved in people accessing the service hinders people claiming. Not having financial resources in Shetland means not being able to take advantage of the opportunities accessible to the majority. Meanwhile the opportunity cost of participating in low skilled, low paid jobs is higher when the cost of private transport to access are included, but are a necessary requirement to access shift work in central areas.’*
- The research also found that *‘There are two faces to deprivation and social exclusion in Shetland: remoteness and concentrations around housing estates. The former is characterised by problems of access and the latter by past circumstances leading to individuals and households becoming trapped. For all, however, the day-to-day survival and exclusion from the high quality of life being enjoyed by those around them is further isolating and demoralising.’*
- *Individuals in Shetland particularly prone and vulnerable to deprivation and social exclusion are:*
  - *young people whose parents are not able to ensure they are able to access opportunities and grow up feeling a part of the community within which they live;*
  - *adults of any age who have low self-esteem and/or poor mental health, often due to situations which have developed as a result of negative experiences in the past and can result in homelessness and substance misuse. This is particularly acute if their situation is not understood by the community within which they live;*
  - *those who are physically disabled or with a long-term illness and their carers, when they do not receive adequate support and understanding;*
  - *those looking after a young family without access to their own transport, particularly those living in remote areas of Shetland;*
  - *older people unable to access opportunities that would enable them to feel a part of the community.*
  - *There is also evidence of social exclusion for ethnic minority individuals in Shetland, whether cultural or as a result of employer barriers, and of degrees of social exclusion for white incomers to Shetland<sup>90</sup>.*
- It is estimated that 25% of households in Shetland are fuel poor<sup>91</sup>. This is almost double the Scottish average of 13%. Shetland has the third highest

<sup>90</sup> Research into deprivation and social exclusion in Shetland

fuel poverty level in Scotland, with Orkney and the Western Isles at 31% and 34% respectively<sup>92</sup>.

- There is currently no data available on numbers of people in occupational pension schemes or those with no arrangements. In 2005, 940 people in Shetland were claiming Pension Credit<sup>93</sup>. Local professional opinion indicates there is a low uptake of this benefit locally.
- The following childcare options are available in Shetland:
  - 39 registered Childminders (10 non-active)
  - 2 Playgroups (non-commissioned)
  - 7 Partner Providers
  - 21 Nursery Classes
  - 2 Creches
  - 1 Out of Nursery Care
  - 2 Private Nurseries
  - 4 Out of School Clubs

There is a lack of registered childminders throughout Shetland and there are still gaps in provision, particularly for the 0-3yr age group. Lack of childcare is restricting people's access to employment opportunities.

- Recent research into Deprivation and Social Exclusion confirmed that lack of transport to available childcare restricts opportunities.

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<sup>91</sup> A household is in fuel poverty if, in order to maintain a satisfactory heating regime, it would be required to spend more than 10% of its income on all household fuel use, where 'satisfactory heating regime' is defined as one that achieves 21° C in the living room, and 18° C in other occupied rooms

<sup>92</sup> Scottish House Condition Survey, *Fuel Poverty in Scotland*

<sup>93</sup> Scottish Neighbourhood Statistics

## COMMUNITY

**Community groups and volunteering continue to flourish and there are signs of increased involvement in leisure activities. However, turn out at local and national elections is low and there are signs of volunteer overload.**

### What is measured

Community involvement is measured through the number of people registered on the electoral role and the number of votes cast in recent political elections in Shetland. Other elements of community are measured by attendance at Shetland Recreational Trust facilities. This data will be expanded on in future years.

### Community Involvement

- The total electorate at Community Council elections has increased from 16,298 to 17,168 between 2002 and 2006<sup>94</sup>.
- In 2002 141 nominations were received for 164 seats, with 114 seats uncontested (70%) and 35 vacancies (21%).
- In 2002 the turnout (via postal ballot) for Community Council elections was Bressay, 27%; Delting, 24%; and Burra, 13%.
- This compares to turnouts of Fetlar, 81%; Lunnasting, 74%; Whiteness, 46%; and Baltasound, 60%.
- There are over 600 community groups in Shetland: Shetland has the greatest number of charities per 10,000 resident population in Scotland, nearly three times the average for Scotland and Shetland's charities have the highest income per 10,000 resident population<sup>95</sup>.
- The number of community organisations supported by grant-aid has decreased from 380 in 2003-04 to 298 in 2004-05<sup>96</sup>. This has been due to changes in the grant administration and preparation for the Island Games.
- Attendance at pools in Shetland has remained fairly steady over the last 3 years, with 342,827 swimming sessions in 2005-06.
- Attendance at other Shetland Recreational Trust provision has increased over the last 3 years from 356,933 to 420,611 in 2005-06.
- Attendance at the cinema in 2005 was 20,078, and was 13,797 to August in 2006<sup>97</sup>.

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<sup>94</sup> Assessors office

<sup>95</sup> Office of the Scottish Charity Regulator

<sup>96</sup> SIC, Community Development

<sup>97</sup> Islesburgh