



**Shetland  
Islands  
Council**

**Shetland Islands Housing Needs and  
Demand Assessment  
October 2022**

**Shetland Islands Council  
Housing Service  
Development Department  
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### Key Findings Template – Estimate of Additional Future Housing Units (5 Year Outputs)

HOUSING NEED AND DEMAND ASSESSMENT				
Key Findings Template: Estimate of Additional (New) Future Housing Units				
Number of years to clear existing need				
Total households with <b>existing need (net)</b>	391	5		
<b>Household Projection Period</b>				
2022 to 2037				
	NRS Principal Projection	NRS Low Migration Projection	NRS High Migration Projection	Shetland In-House Projection
Total number of new <b>households over the projection period</b>	166	98	258	494
<b>HNDA Projection Period</b>				
2021-2040				
<b>ANNUAL NEED - YEARS 1 TO 5 (2021-2025)</b>				
Total households over the projection period who <i>may</i> afford:	Default	Scenario1	Scenario2A	Scenario7
<b>OWNER OCCUPATION</b>	62	62	64	150
<b>PRIVATE RENT</b>	54	54	56	118
<b>BELOW MARKET RENT</b>	42	42	44	35
<b>SOCIAL RENT</b>	134	436	438	425
<b>Total additional future housing units</b>	<b>292</b>	<b>594</b>	<b>602</b>	<b>728</b>
<b>ANNUAL NEED - YEARS 5 TO 10 (2026-2030)</b>				
Total households over the projection period who <i>may</i> afford:	Default	Scenario1	Scenario2A	Scenario7
<b>OWNER OCCUPATION</b>	20	20	29	89
<b>PRIVATE RENT</b>	17	17	25	68
<b>BELOW MARKET RENT</b>	13	13	19	24
<b>SOCIAL RENT</b>	13	13	19	20
<b>Total additional future housing units</b>	<b>64</b>	<b>64</b>	<b>92</b>	<b>201</b>





## Key Findings Template – Estimate of Additional Future Housing Units (5 Year Outputs)

ANNUAL NEED - YEARS 10 TO 15 (2031-2035)				
Total households over the projection period who <i>may</i> afford:	Default	Scenario1	Scenario2A	Scenario7
<b>OWNER OCCUPATION</b>	0	0	7	18
<b>PRIVATE RENT</b>	0	0	6	14
<b>BELOW MARKET RENT</b>	0	0	3	5
<b>SOCIAL RENT</b>	0	0	3	4
<b>Total additional future housing units</b>	<b>0</b>	<b>0</b>	<b>19</b>	<b>41</b>

ANNUAL NEED - YEARS 15 TO 20 (2036-2040)				
Total households over the projection period who <i>may</i> afford:	Default	Scenario1	Scenario2A	Scenario7
<b>OWNER OCCUPATION</b>	0	0	5	0
<b>PRIVATE RENT</b>	0	0	4	0
<b>BELOW MARKET RENT</b>	0	0	2	0
<b>SOCIAL RENT</b>	0	0	2	0
<b>Total additional future housing units</b>	<b>0</b>	<b>0</b>	<b>13</b>	<b>0</b>

CUMULATIVE TOTAL AT END OF PROJECTION PERIOD				
Total households over the projection period who <i>may</i> afford:	Default	Scenario1	Scenario2A	Scenario7
<b>OWNER OCCUPATION</b>	82	82	105	257
<b>PRIVATE RENT</b>	71	71	91	200
<b>BELOW MARKET RENT</b>	55	55	68	64
<b>SOCIAL RENT</b>	147	449	462	449
<b>Total additional future housing units</b>	<b>355</b>	<b>657</b>	<b>726</b>	<b>970</b>

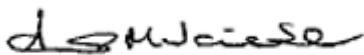
This Housing Need and Demand Assessment has been developed by the Shetland Housing Market Partnership

Signed on behalf of the Shetland Housing Market partnership:



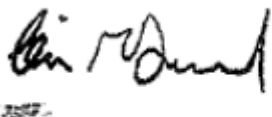
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## Chapter 1 – Introduction

### 1.1 - Purpose of a HNDA

This document estimates the future housing need and demand in Shetland over 5, 10 and 20 years.

The HNDA is to be used as evidence to inform

- The Council's Local Housing Strategy (LHS)
- The Shetland Local Development Plan (LDP)

The HNDA has been prepared in line with the Scottish Government guidance provided. A Managers Guide and Practitioners Guide were used, as well as the Housing Need and Demand Analysis Tool which was developed by the Centre for Housing Market Analysis (CHMA).

HNDA's are designed to give broad, long-run estimates of what future housing might be, rather than precision estimates. The Housing Need and Demand Assessment (HNDA) is used to allow local strategic planning for housing to be taken forward. The Housing (Scotland) Act 2001 places a duty on local authorities to develop Local Housing Strategies (LHS), informed by an assessment of housing need and demand and the provision of related services. The Town and Country (Scotland) Act 1997 (amended) requires Local and Strategic Planning Authorities to plan for land use in their area, including the allocation of land for housing. Both of these functions are driven by the HNDA.

Housing need refers to households lacking their own housing or living in housing which is not adequate or suitable, who are unlikely to be able to meet their needs in the housing market without some assistance. Housing demand is the quantity and type of housing which households wish to buy or rent and are able to afford. Housing Market areas (HMAs) are geographical areas which are relatively self-contained in terms of housing demand.

Estimates of housing need described in two categories –

- future need for households yet to form, and
- existing (or backlog) need experienced by households at the present time

The HNDA should underpin the following key areas of housing policy and planning:

- Housing Supply Targets (HSTs) – to inform the setting of a HST for use in the LHS and Development Plan. The HST sets out the amount and type of housing to be delivered over the period of the plan.
- Stock Management – to assist understanding of the current and future demand for housing by size, type, tenure and location in order to optimise the provision, management and use of housing stock.
- Housing Investment – to inform housing investments plans, e.g. Strategic Housing Investment Plans (SHIPs)
- Specialist Provision – to inform the provision and use of specialist housing and housing-related services to enable independent living for all, as expressed in policy in the LHS and to inform planning decisions.

- Geographic Distribution of Land – to inform the spatial allocation of land through the Development Plan for new housing at both HMA and LA level.

An analysis group consisting of Housing and Planning staff met to carry out analysis on information available, and consider the local context as required.

## 1.2 – Governance

The Housing Market Partnership Group was formed in May 2015. It was chaired by the Shetland Islands Council (SIC) Director of Development and the group included representation from:

SIC Housing

SIC Planning

SIC Community Planning & Development

SIC Capital Programmes

Highlands & Islands Enterprise

Hjaltland Housing Association

Minutes of Housing Market Partnership meetings available on request.

## 1.3 – Quality Assurance

The CHMA has an informal role to support authorities with HNDA production and a formal role to appraise HNDAs as robust and credible.

The sample sizes are robust to ensure the HNDA is in line with the governance. The document was started to be created in 2017, we have not recreated all charts or tables in the document but updated at much as possible. If you need any further details, please get in touch with the Housing Service. Quality assurance procedures have been worked through during the HNDA process ensuring data sources have been triangulated where required and ensuring the calculations on the evidence findings have been checked thoroughly. Please note that estimates can be misleading so care has been taken in the analysis of data, particularly when small numbers are involved in calculations.

Equality Considerations –

The Equality Act 2010 introduced a public sector Equality Duty in April 2011 to:

- Eliminate discrimination, harassment and victimisation
- Advance equality of opportunity
- Foster good relations
- The Statutory Duty requires consideration of the above in respect of the following protected characteristics:
  - Age
  - Disability
  - Sex (including pregnancy and maternity)
  - Gender reassignment

- Sexual orientation
- Race
- Religion and belief

HNDA's produce a range of future housing estimates. This is an estimate of the total amount of housing need and demand in an area. The housing estimate then helps to determine the Housing Supply Target (HST). The HST is not part of the HNDA process, it is the next stage of the housing planning process after the HNDA.

The HST feeds into both LHSs and Development Plans. It sets out the estimated level of additional housing that can actually be delivered on the ground, over the period of the plan. The HST represents a policy-based interpretation of the HNDA and therefore should be considered separately to the HNDA.

#### 1.4 - Defining Shetland's Housing Market Areas

It was established at an early stage that the Housing Market Areas should mirror the localities work that had been started through the Shetland Partnership. The link to Shetland's Partnership Plan 2018-2028 is here - <https://www.shetland.gov.uk/downloads/file/1085/shetland-partnership-plan>

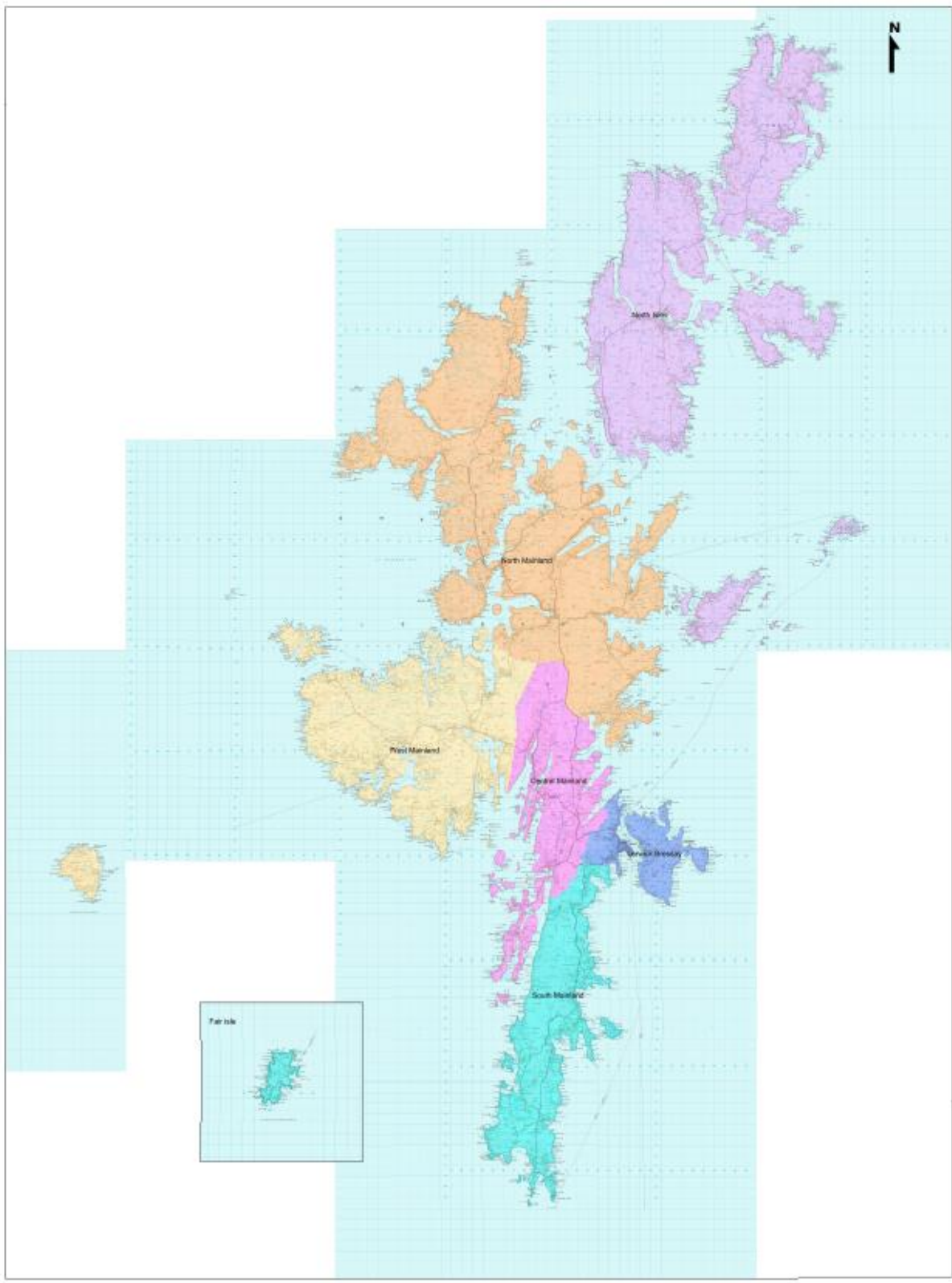
Therefore, Housing Market Areas (HMAs) are:

<b>Locality</b>	<b>Community Council</b>
Central	Scalloway; Burra & Trondra; Tingwall, Whiteness & Weisdale
Lerwick & Bressay	Lerwick; Bressay
North Isles	Yell; Fetlar; Unst; Whalsay; Skerries
North Mainland	Delting; Nesting & Lunnasting; Northmaven
South Mainland	Dunrossness; Gulberwick, Quarff & Cunningsburgh; Sandwick;
West Mainland	Sandness & Walls; Sandsting & Aithsting

As some numbers are very small, it was agreed for Housing Market Areas to be set at the size they are but with the understanding that if further analysis was required at a lower level, it would be done, where possible.

The housing market areas are the same as the areas included within the Shetland's Partnership Plan 2018-2028 which allows comparative work to be carried out with defined boundaries.

The Housing Market Areas are shown below. Map 1.1 – Housing Market Areas



**Localities (revised Aug 2015)**  
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## 1.5 - Consultation Carried Out

The Main Issues Report went to Council, document published

The draft HNDA data was used as part of the consultation for the LHS process.

Through the LHS consultation, we used a lot of HNDA information through the multi agency Steering Group and the public consultation exercises. Consultation was carried out by Arneill Johnston as part of the Local Housing Strategy preparation. An engagement survey sent out to Shetland residents, followed by a conference and focus group work.

The LHS Framework report was approved at Development Committee based on the datasources from the HNDA.

Local Development Plan Main Issues consultation carried out.

Further information is available on the Shetland Islands Council website.

The Place Based approach with the Scottish Futures Trust input has been gathering data including housing data on place based discussions. This is a locality based, holistic view of services and how they interact to support community involving schools service, transport service, housing and planning which is being driven by Housing to 2040 and NPF4.



## Chapter 2 - Key Housing Market Drivers

HOUSING MARKET DRIVERS - KEY ISSUES TABLE	
Local Housing Strategy & Local Development Plan	Key Issues Identified in the HNDA
Demographic issues for the local housing market(s)	<p>The population in Shetland is relatively stable with the Mid Year Estimate 2019 at 22,920. There is small projected decrease in the population.</p> <p>Compared to Scotland, Shetland's population has a higher % under 16's, lower % of working age and higher % pensionable age.</p> <p>In Shetland there is a projected increase in 65+ population. This will require different housing solutions in partnership with health and care services, as set out in the housing contribution statement to the joint strategic commissioning plan.</p> <p>The number of households is increasing which will require land to be identified and more housing solutions to be provided through the Local Housing Strategy and Local Development Plan process.</p> <p>The household size is decreasing leading to an increase in demand for smaller sized properties.</p>
Affordability issues for the local housing market(s)	<p>Mean Income for Shetland in 2020 was £39,097, higher than the Scottish average of £38,817.</p> <p>Inequalities gap increasing.</p> <p>The Minimum Income Standard report shows that the cost of living is much higher in Shetland, so even though household incomes are higher, living expenses are disproportionately higher.</p> <p>House prices have continued to increase and are closer in line with Scottish average levels over recent years.</p> <p>Private rented market needs to adapt following a period of high economic activity to be seen as an affordable housing option. It is currently a very small percentage of the housing market in Shetland, driven by demand based on economic activity.</p>
Economic issues for the local housing market (s)	<p>Economic peaks and troughs which are unpredictable and difficult to gauge, e.g. oil prices, with volatile impacts on housing market and demand evidenced by recent private rented sector activity.</p>

High level of employment can lead to difficulties in businesses attracting labour with cost and availability of accommodation for workforce often an issue.

Need to balance community sustainability in rural and remote areas with the demand for Lerwick & Central areas both in terms of economic activity and housing demand.

Despite Shetland having a higher % of economically active people than the Scottish or Great Britain rate, this is projected to decline.

Key gap in the projected population figures is predominantly the working age population range and there is a real need to attract a younger workforce to live, work, study and invest in Shetland.

The Minimum Income report demonstrates the additional cost of living in remote rural areas are typically 10-40% higher than elsewhere in the UK.

## Household Composition

### 2.1 - POPULATION

**The Shetland Population** Using Census figures from 2001 to 2011, the Shetland population increased by 5.4% to 23,167 in 2011. Considering the housing market areas, the largest increase is in South (18.1%), followed jointly by Central and West (10.5%) and then North (4.4%). The decreases are in Lerwick & Bressay (-0.7%) and the North Isles (-2.7%). This is shown by housing market area in Table 2.1.

Table 2.1 Population by Housing Market Area

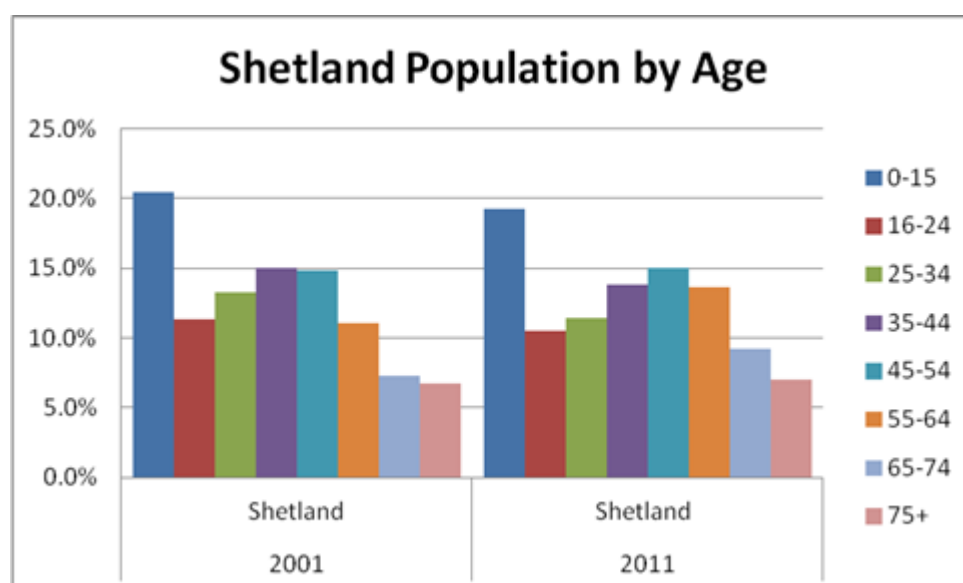
Locality	2001	2011	Difference	% Change
Lerwick & Bressay	7378	7326	-52	-0.7%
South	3562	4206	644	18.1%
Central	3071	3394	323	10.5%
North	3145	3282	137	4.4%
North Isles	2873	2794	-79	-2.7%
West	1959	2165	206	10.5%
<b>Shetland</b>	<b>21988</b>	<b>23167</b>	<b>1179</b>	<b>5.4%</b>

Source: Census, 2001 & 2011

**Population by Age Profile** The population by age profile for Shetland according to Census 2001 and 2011 figures shows that there has been a decrease in the population bands between 0-15 and 35-44, and an increase in the population bands over 45-54.

The highest increase has been with the 55-64 age band of 2.6%. This shows the Shetland population is increasing, with more older people than younger people. Figure 2.2 shows the population age using the 2001 and 2011 Census figures and Table 2.2 shows the % change by each age band.

Figure 2.1 Shetland Population by Age



Source: Census, 2001 & 2011

Table 2.2 Difference in Age Bands of Shetland Population between 2001 and 2011

Age Bands	0-15	16-24	25-34	35-44	45-54	55-64	65-74	75+
% Change from 2001-2011	-1.20%	-0.80%	-1.80%	-1.20%	0.20%	2.60%	1.90%	0.30%

Source: Census, 2001 & 2011

Table 2.3 Age Bands according to Census 2001 and 2011

Housing Market Area	0-15		16-64		65+	
	2001	2011	2001	2011	2001	2011
Central Mainland	19.1%	19.8%	67.8%	67.5%	13.1%	12.7%
Lerwick & Bressay	19.0%	17.2%	66.1%	65.1%	14.9%	17.7%
North Isles	19.2%	18.3%	63.8%	58.6%	17.0%	23.0%
North Mainland	23.0%	19.2%	65.7%	67.1%	11.4%	13.6%
South Mainland	22.4%	22.2%	65.1%	63.5%	12.5%	14.3%
West Mainland	22.4%	21.1%	62.3%	62.3%	15.3%	16.6%
Shetland	20.5%	19.3%	65.5%	64.4%	14.0%	16.3%

Source: Census, 2001 & 2011

**Population by Housing Market Area and Age Bands** Analysis was carried out on ages across the Housing Market Areas. The age bands covering 'working age' were amalgamated by Housing Market Area using datazone data. The evidence shows that the % of the population under the age of 16 reduced from 20.5% to 19.3%. The population of 16-64 age band decreased from 65.5% to 64.4% with an increase in the % of the population in the over 65 years age band from 14.0% to 16.3%.

As for the Housing Market Areas, according to Census 2011,

- The highest % of 0-15 was in the South Mainland, followed by the West Mainland and Central with Lerwick & Bressay having the lowest percentage.
- The highest % of 16-64 was in the Central Mainland, followed closely by North Mainland and Lerwick & Bressay, with the North Isles having the lowest percentage.
- The highest percentage of 65+ was in the North Isles, followed by Lerwick & Bressay and West Mainland, with the lowest % in Central Mainland.
- There was a decrease in all Housing Market Areas for the 0-15 population except for the Central Mainland.
- The only increase in the 16-64 age band was in the North Mainland.
- There was an increase of 65+ in all areas except for the Central Mainland.

According to the Mid Year Population Estimates 2019, shown in Table 2.4 the total population for Shetland was 22,920.

Table 2.4 Mid Year Population Estimates

Age group	Shetland - All people	% of population	Scotland - All people	Scotland % of population	Shetland & Scotland % Difference
<b>0 to 15</b>	4,198	18.3%	921,397	16.9%	1.5%
<b>16 to 24</b>	2,082	9.1%	573,722	10.5%	-1.4%
<b>25 to 44</b>	5,404	23.6%	1,423,672	26.1%	-2.5%
<b>45 to 64</b>	6,550	28.6%	1,500,364	27.5%	1.1%
<b>65 to 74</b>	2,634	11.5%	578,300	10.6%	0.9%
<b>75 and over</b>	2,052	9.0%	465,845	8.5%	0.4%
<b>All people</b>	22,920	100.0%	5,463,300	100.0%	

Source: Mid Year Estimates 2019, National Records of Scotland

This evidence shows that there is a lower proportion of working age people and a higher proportion of under 16 year olds and over 65 year olds in Shetland than in Scotland as a whole.

**Gender Breakdown** According to the 2019 Mid Year Estimates, show there is a higher proportion of males (51.0%) to females (49.0%) in Shetland. This is different from Scotland as a whole where there are more females than males. Table 2.5 provides details.

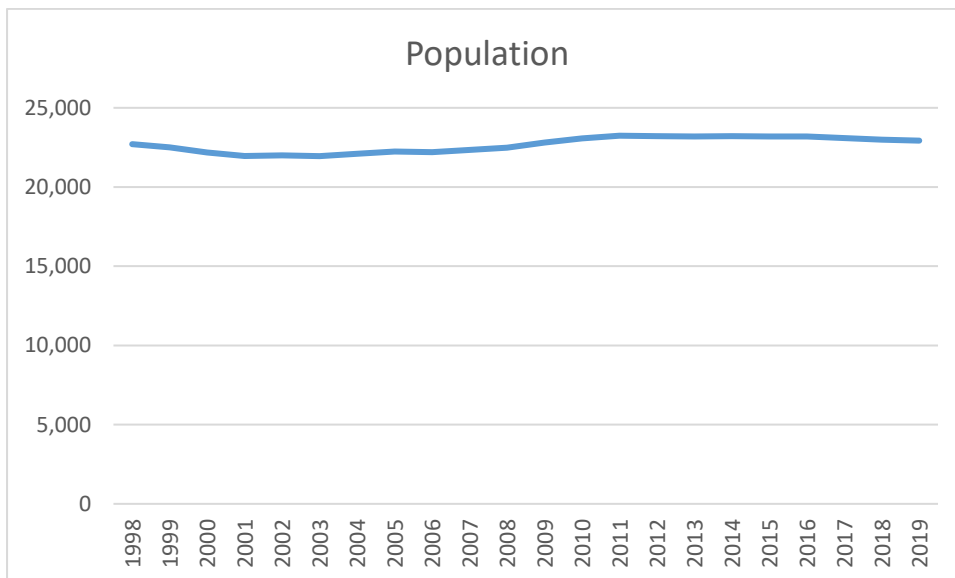
Table 2.5 Gender Breakdown Shetland and Scotland

Gender	Shetland		Scotland	
Males	11,685	51.0%	2,663,003	48.7%
Females	11,235	49.0%	2,800,297	51.3%
Total	22,920	100.0%	5,463,300	100.0%

Source: National Records of Scotland, 2019

**Population Trends** Figure 2.2 shows how the Mid Year Estimates for Shetland has remained quite static over the years, with the highest point being in 2011 at 23,240 and the lowest point being in 2001 at 21,960.

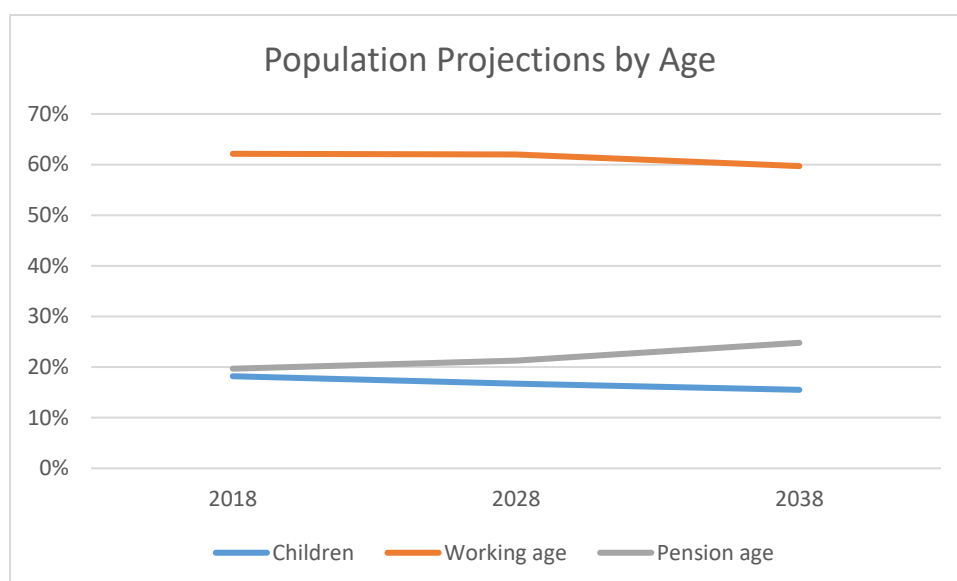
Figure 2.2 Population Trends



Source: Mid Year Estimates 2019, National Records of Scotland

**Population Projections** The National Records of Scotland provide regular population projections. The projections based on 2018 population projections shows that the estimated population at 2018 was 22,990, which is projected to decrease by 1% to 22,824 by 2028, and further decrease to 22,073 by 2038. This is a decrease of -0.7% in the first ten years, and a decrease of -4.0% in twenty years. Figure 2.3 gives more detail on the projections by the age of population.

Figure 2.3 Population Projections by Age



Source: Records of Scotland, based on 2018 projections.

**Age Group Population Projections** Based on the 2018 population projections, there is a decrease in the younger age groups and an increase in the ageing population which Table 2.6 demonstrates up to 2038.

Table 2.6 Age Group Population Projections – 2018-2038

	Household Age Group – Projections					
	0-14	15-29	30-44	45-59	60-74	75+
<b>Shetland</b>						
<b>2018</b>	17%	16%	18%	22%	18%	9%
<b>2028</b>	15%	15%	19%	20%	20%	12%
<b>2038</b>	14%	15%	17%	20%	19%	14%

Source: National Records of Scotland, 2018

**Population by Gender** – Based on the 2018 population projections, the split by gender shows an increase in males in Shetland compared to females, as shown in Table 2.7.

Table 2.7 Population Projections in Shetland by Gender

Gender	2018	%	2028	%	2038	%
<b>Males</b>	11,713	51%	11,802	52%	11,572	52%
<b>Females</b>	11,277	49%	11,070	48%	10,592	48%
<b>Total</b>	<b>22,990</b>	<b>100%</b>	<b>22,872</b>	<b>100%</b>	<b>22,164</b>	<b>100%</b>

Source: National Records of Scotland, 2018

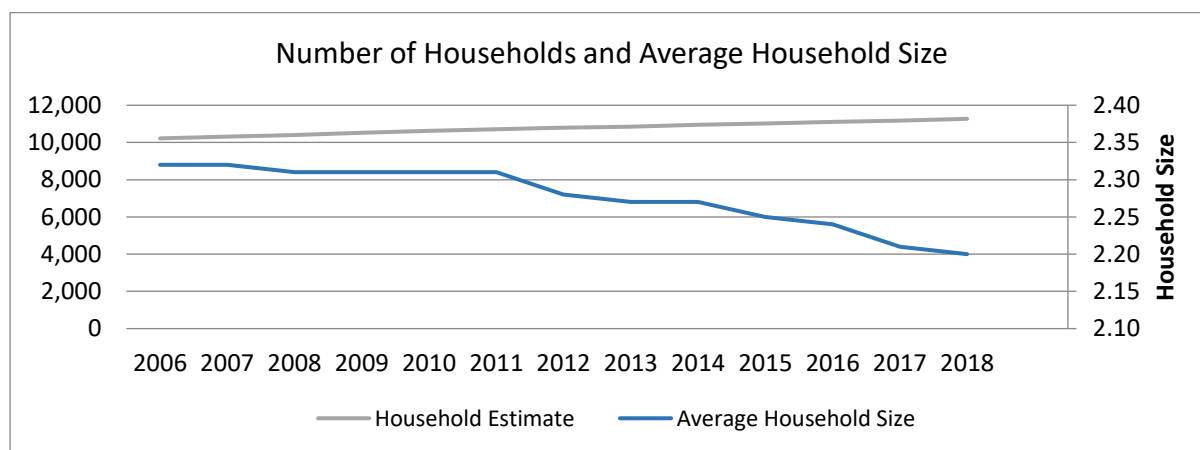
## 2.2 - HOUSEHOLDS

**Estimates of Households and Dwellings** According to the National Records of Scotland, estimated number of households in Shetland in 2018 was 10,384. This is an increase of 815 (8.61%) households since 2006. This increase is higher than the Scottish % increase of 6.8%, but lower than the % increases in households in Orkney, Highland and Eilean Siar.

**Household Size.** According to the National Records of Scotland, the average household size in Shetland in 2020 was 2.17, and the Scottish average was 2.14. The average household size in Shetland in 2010 was 2.31, compared to the Scottish average of 2.18. There has been a decrease for Shetland of 6.2% from 2010 compared to the overall decrease of 2.1% across Scotland during the same period. The household size in Shetland in 2020 is closer to the Scottish average than it was 10 years ago.

This evidence shows that in Shetland, the number of households and dwellings are increasing, and the household size is decreasing. The increase rate for dwellings and households is higher than in Scotland and the size of households in Shetland is decreasing, but higher than the Scottish average. Figure 2.4 details this.

Figure 2.4 Number of Dwellings, Number of Households, Household Size



Source: National Records of Scotland, 2018

**Household Type** Comparing the 2001 and 2011 Census data, there has been an increase in smaller household sizes and a reduction in larger household sizes. Table 2.8 shows the % of household type by Housing Market Area according to Census at 2011. Table 2.9 demonstrates the change between Census years and the increase in smaller households since 2001. By Housing Market Area, it shows that Lerwick & Bressay had the highest percentage of single people (37.6%), followed by West (31.0%) and North Isles (30.5%).



Table 2.8 % of Household Type by Housing Market Area according to Census 2011

Housing Market Area	1 person	2 people	3 people	4 people	5 people	6 people	7 people	8+ people
Lerwick & Bressay	37.6%	34.0%	13.4%	9.6%	4.0%	0.9%	0.2%	0.2%
Central	27.3%	33.7%	15.8%	15.5%	6.0%	1.4%	0.2%	0.1%
South	28.3%	36.3%	13.9%	13.3%	5.9%	1.4%	0.1%	0.7%
North	30.1%	32.5%	16.7%	13.6%	5.4%	1.5%	0.2%	0.1%
West	31.0%	33.7%	11.8%	13.6%	7.7%	1.7%	0.2%	0.2%
North Isles	30.5%	37.8%	11.1%	12.8%	4.7%	1.9%	0.6%	0.6%
Shetland	32.1%	34.5%	13.9%	12.4%	5.2%	1.3%	0.3%	0.3%

Source: Census, 2011

Table 2.9 % Change of Household Type by Housing Market Area between Census 2011 and Census 2001 data

2011 Less 2001 Proportions	1 person	2 people	3 people	4 people	5 people	6 people	7 people	8+ people
Lerwick & Bressay	3.2%	0.2%	-1.4%	-0.5%	-1.1%	-0.6%	0.0%	0.2%
Central	0.7%	0.9%	-0.2%	0.0%	-0.3%	-0.9%	-0.1%	0.1%
South	-1.6%	3.3%	0.2%	-1.4%	-1.2%	0.0%	0.1%	0.5%
North	0.9%	2.3%	0.3%	0.4%	-3.1%	-0.5%	-0.3%	0.1%
West	1.7%	1.3%	-3.6%	0.9%	1.0%	-1.2%	0.1%	-0.2%
North Isles	-1.0%	5.2%	-3.2%	1.8%	-2.9%	-0.7%	0.3%	0.5%
Shetland	1.0%	1.7%	-1.1%	0.1%	-1.3%	-0.6%	0.0%	0.2%

Source: Census, 2001 & 2011

Household projections were produced by the National Records of Scotland, based on 2018 data. This data shows that across Scotland, there is a projected increase of 5% of households from 2018 to 2028. For Shetland, there is a projected increase of 3%. Table 2.10 provides details of this, as well as other similar local authority areas.

Table 2.10 Household Projections, 2018 based (principal migration)

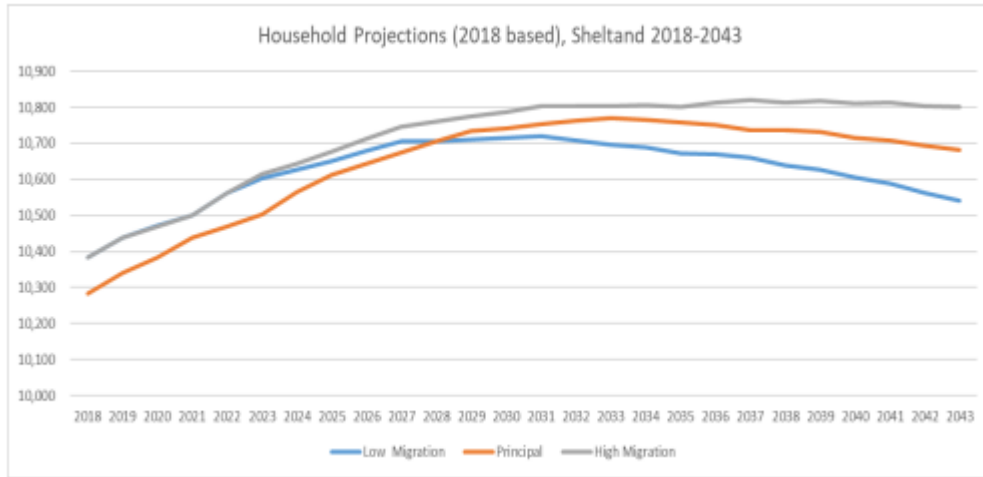
Council area	2018	2028	Change
Scotland	2,477,276	2,597,626	5%
Shetland Islands	10,384	10,742	3%
Orkney Islands	10,506	11,010	5%
Na h-Eileanan Siar	12,773	12,478	-2%
Highland	108,878	113,704	4%

Source: National Records of Scotland, 2018

Figure 2.5 provides further detail on the household projections for Shetland between 2018 to 2043, with different migration options of low, high and principal migration. Considering low migration, the projection is an increase to 10,705 to 2028, and a decrease to 10,540 to 2043. Considering high migration, the projection is an increase to 10,760 in 2028 and a further increase to 10,802 in 2043. Finally, considering principal migration, the projection is an increase to 10,742 in 2028 and a

decrease to 10,649 in 2043. This shows the household projections in the short and medium term to rise, thereafter a projected decrease on low migration, with a less pronounced projected decrease in the longer term.

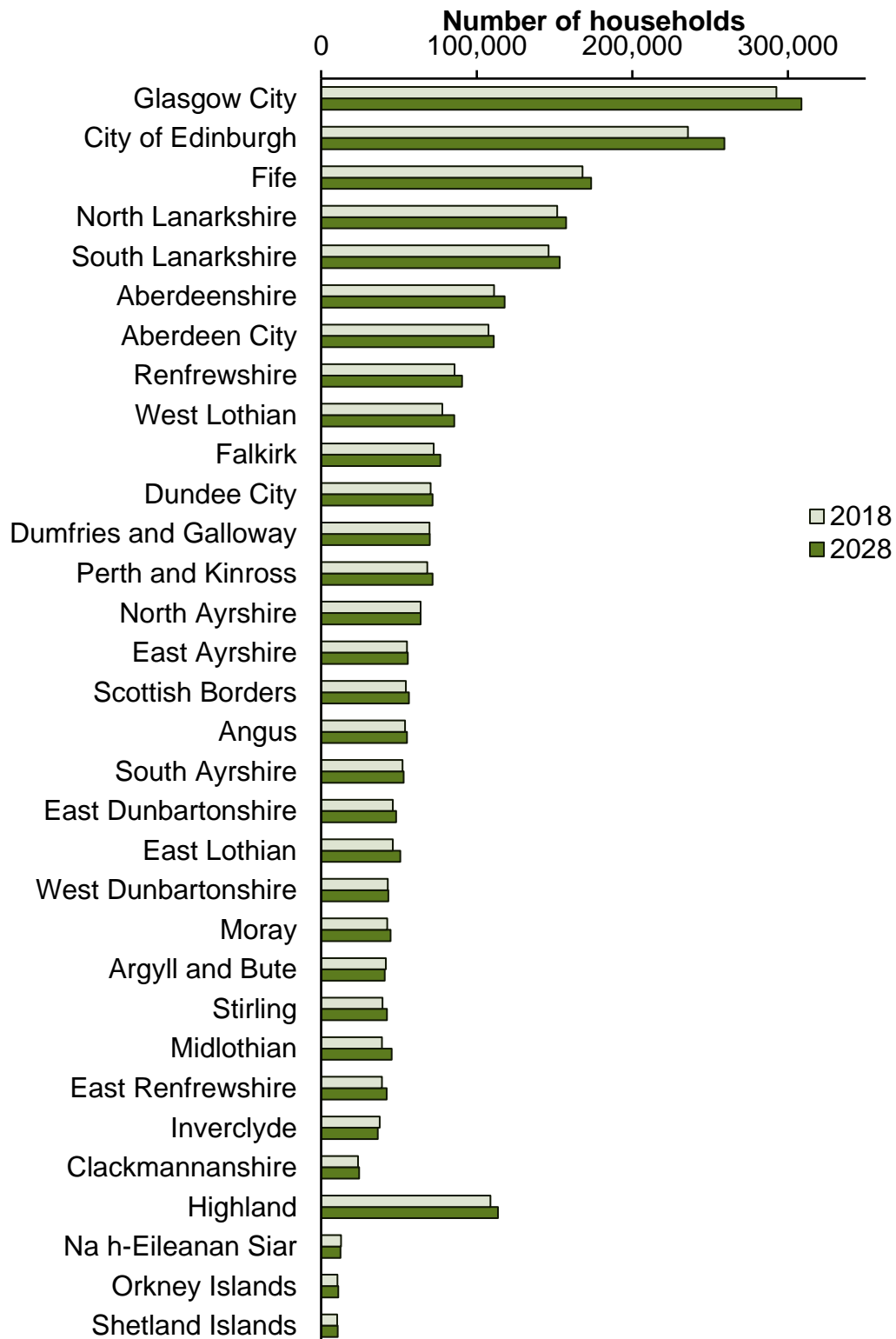
Figure 2.5 Household Projections



Source: National Records of Scotland, 2020

Figure 2.6 details the projected % change in the number of households by Council Area 2018 to 2028.

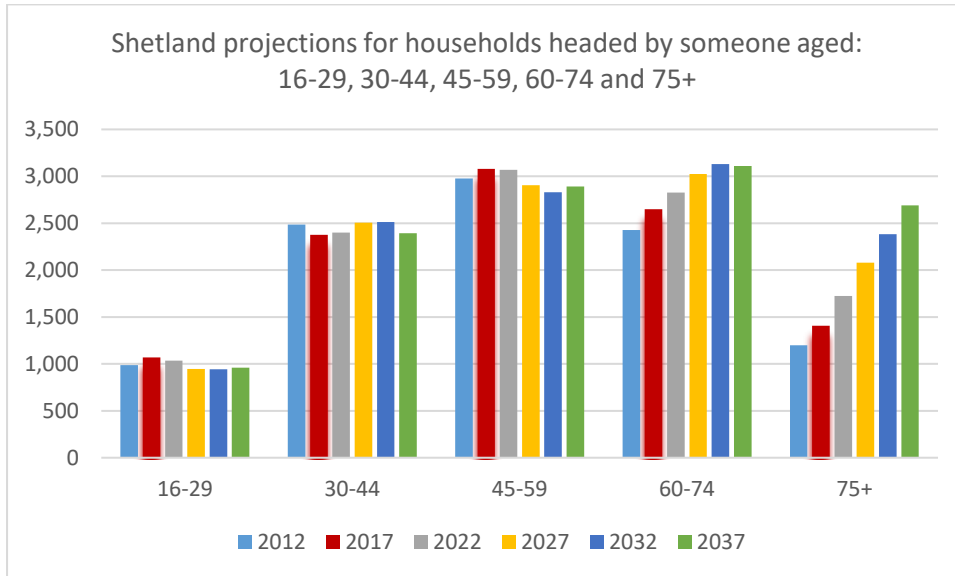
Figure 2.6 Projected % change in the number of households by Council Area 2018 and 2028



Source: National Records of Scotland, 2020

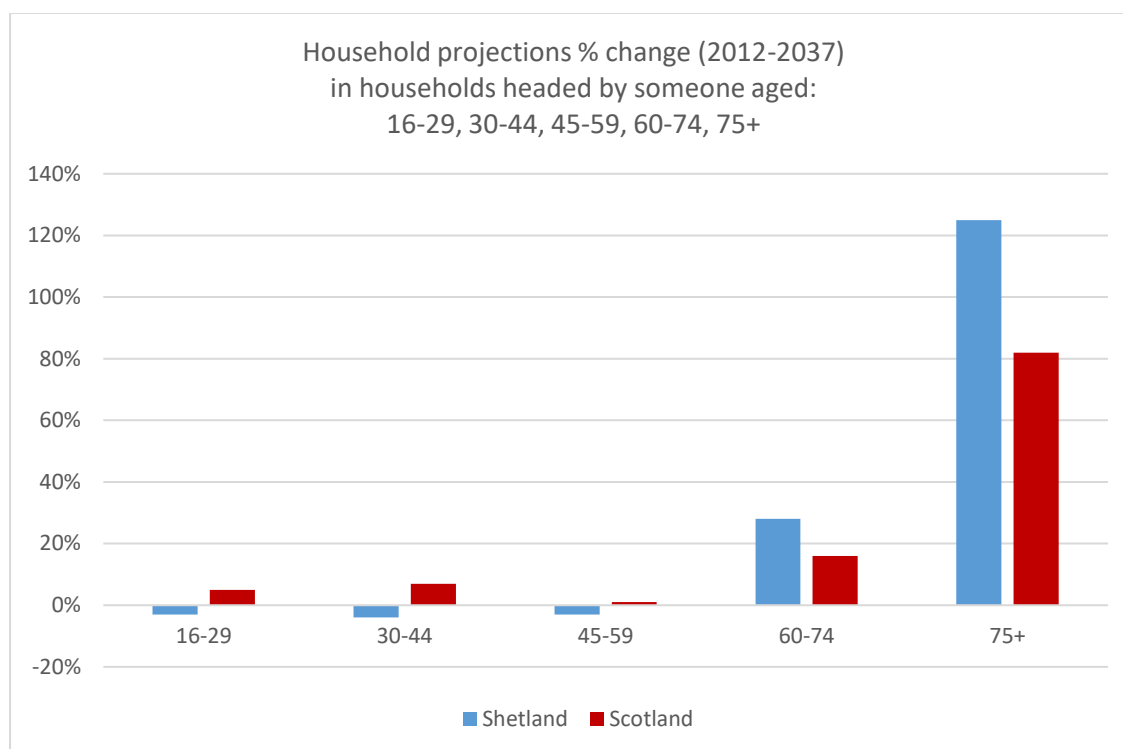
**Projected % Change in Age of Head of Household** Analysis has been carried out on the information provided by the National Records of Scotland regarding the % change in head of household. As with the overall household age group projections, when using this dataset, the evidence shows for Shetland a decrease in the 16-29, 30-44 and 45-59 age groups, but an increase in 60-74 and 75+. This differs from Scotland as a whole as there is an increase in all age groups for head of household. The biggest increase is in the 75+ age group where there is 125% change between 2012-2037. Figure 2.7 shows the detail for Shetland and Figure 2.14 shows the % change for Shetland and Scotland.

**Figure 2.7 Household Projections for Households Headed by Age Bands for Shetland**



Source: National Records of Scotland, 2012

Figure 2.8 Household Projection Change for Households Headed by Age Bands for Shetland and Scotland



Source: National Records of Scotland, 2012

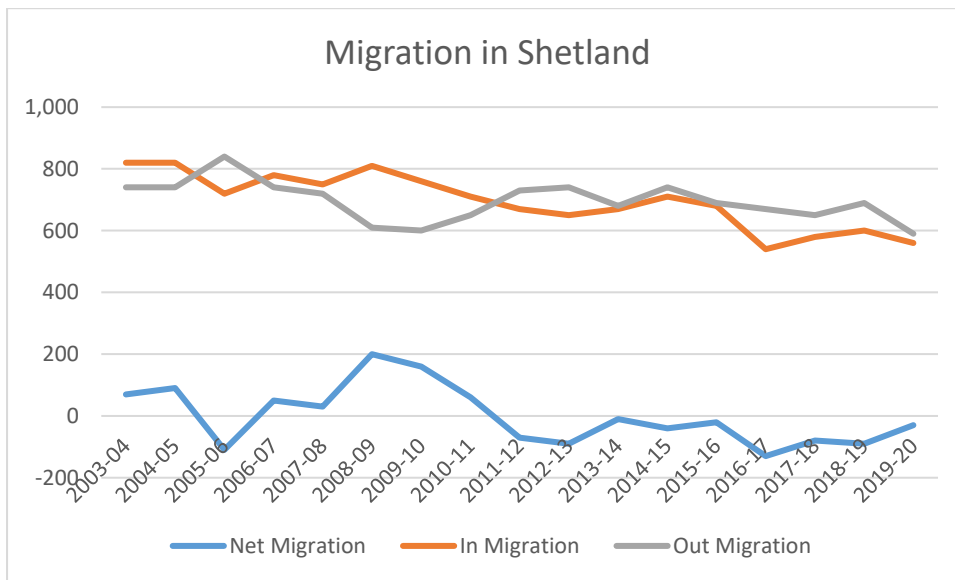
**Projected percentage of Households by type** The analysis shows that compared to Scotland, the projection for Shetland is for there to be a slightly lower proportion of single households and single households 1+ children, and a higher proportion of 2 adults and 2 adults and children and above.

Table 2.11 Projected percentage of households of each type, by area, 2018 and 2043

Shetland	1 adult	1 adult, 1+ children	2 adults	2+ adults, 1+ children	3+ adults
2018	33%	4%	33%	21%	9%
2028	34%	4%	34%	19%	8%
2043	35%	4%	35%	18%	8%
Scotland	1 adult	1 adult, 1+ children	2 adults	2+ adults, 1+ children	3+ adults
2018	36%	6%	31%	18%	8%
2028	37%	6%	32%	17%	8%
2043	38%	6%	32%	16%	8%

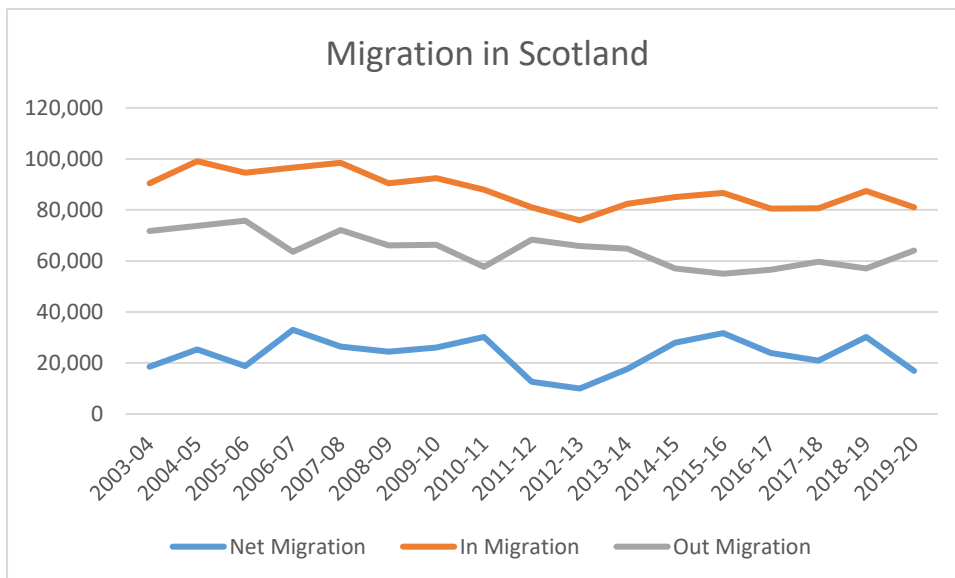
**Migration** Using the National Records of Scotland data published in 2021, Figure 2.9 below shows how In-migration, Out-Migration and Net Migration has changed for Shetland from 2003/2002 to 2019/2020. The Net Migration is the difference between in and out migration. This varies over the years with the highest being 200 in 2008/2009 and the lowest being minus 130 in 2016/2017. Figure 2.10 shows the migration figures for Scotland where there has been a positive net migration in all years, unlike Shetland.

Figure 2.9 In-Migration, Out-Migration and Net Migration



Source: National Records of Scotland, 2021

Figure 2.10 In-Migration, Out-Migration and Net Migration

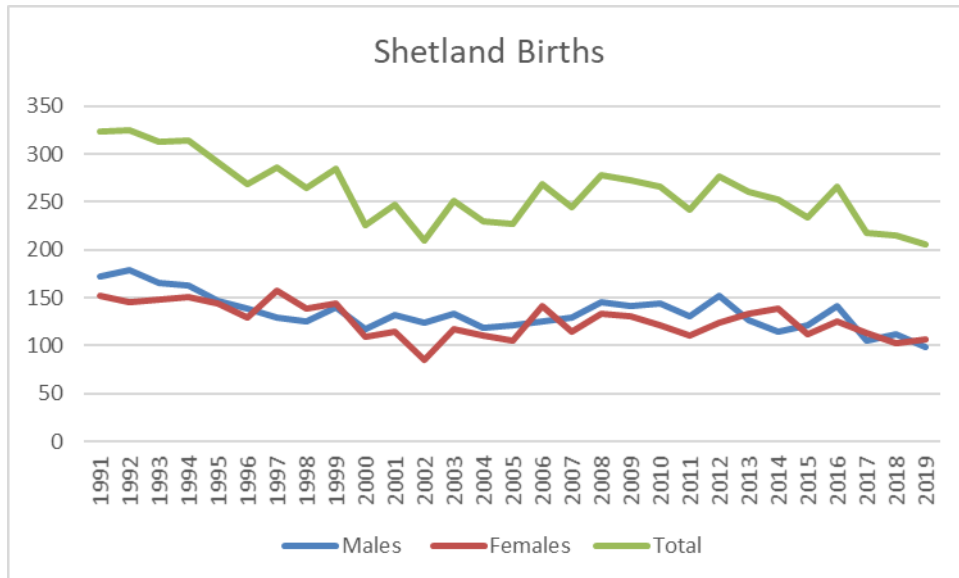


Source: National Records of Scotland, 2021

**Gypsy Travellers** - The Census 2011 data shows that Shetland had 8 Gypsy Travellers at the time of the Census which would equate to 0.03% of the population. A procedure is in place to use regarding encampment, if and when required although this is not considered a significant issue in Shetland at this time.

**Births** Over the 29 year period between 1991-2019, there were 7,560 births registered in Shetland. Of these, 51.5% were male and 48.5% were female. The trend is shown in Figure 2.11

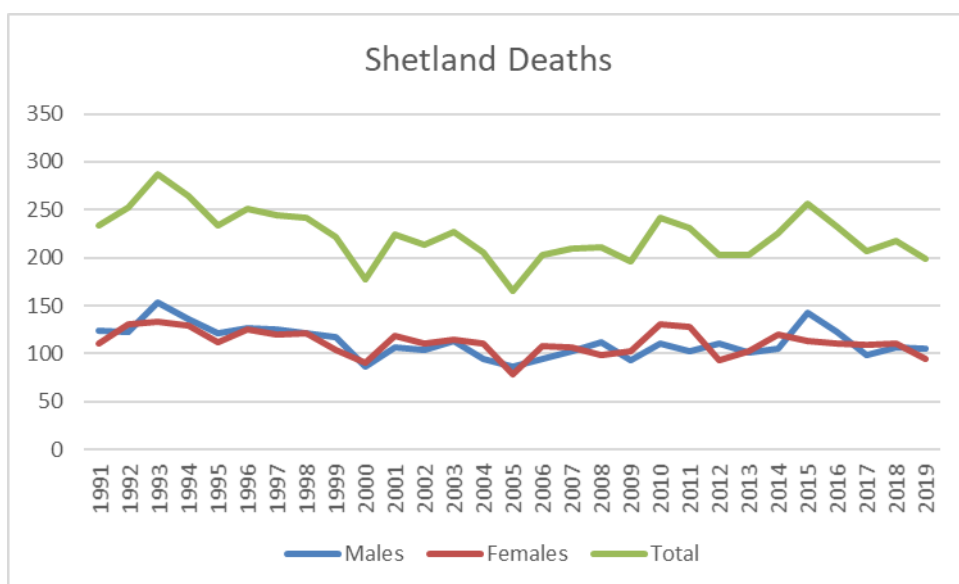
Figure 2.11 Shetland Births 1991 to 2019



Source: National Records of Scotland, 2019

**Deaths** Over the 29 year period between 1991-2019, there were 6,475 deaths registered in Shetland. Of these, 50.1% were male, and 49.9% were female. The trend is shown in Figure 2.12.

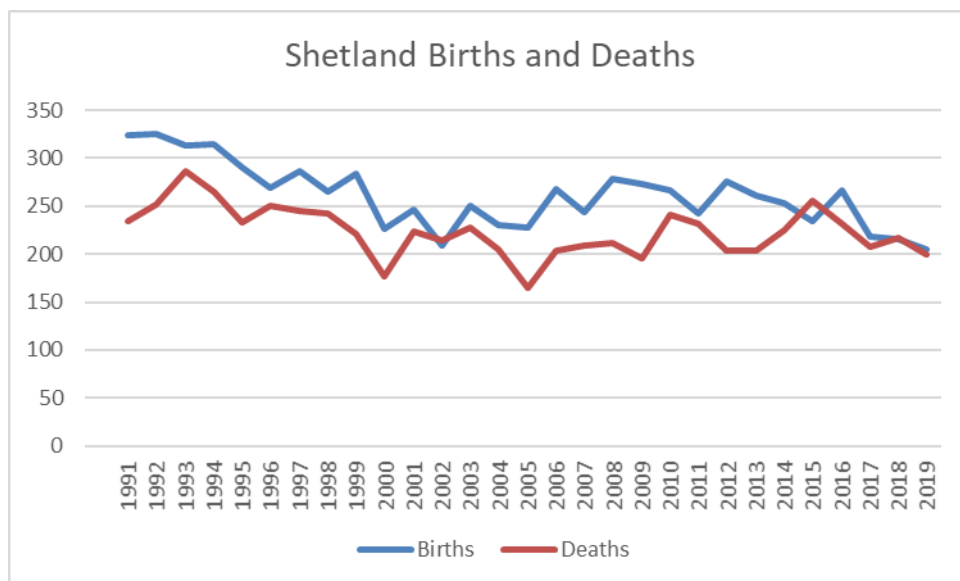
Figure 2.12 Shetland Deaths 1991 to 2019



Source: National Records of Scotland, 2019

**Births and Deaths** Comparing births and deaths, there has been a higher birth rate compared to death rate in all years other than three years between 1991 and 2019.

Figure 2.13 Shetland Births and Deaths



Source: National Records of Scotland, 2019

**Shetland Births and Deaths by Housing Market Area** - Figure 2.13 shows the birth rate and death rate by housing market area between 2004-2014. A higher birth rate than death rate was shown in all areas other than in the North Isles.

### 2.3 - Life Expectancy

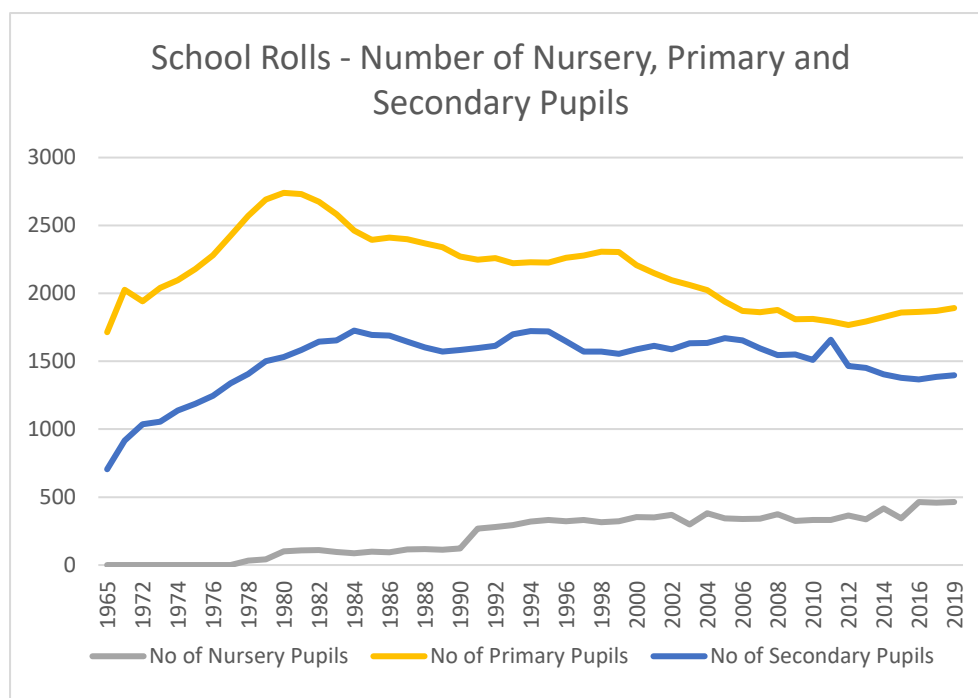
According to the 2018-2020 Healthy Life Expectancy (HLE) Tables for Scotland which are available from the National Records of Scotland the life expectancy of people in Shetland is higher than the Scottish average. The life expectancy of a female in Scotland was 61.8 years, and in Shetland it is 65.3 years. The life expectancy of a male in Scotland is 60.9 years, and in Shetland it is 64.1 years.

### 2.4 - School Roll Information

Data provided from the SIC School Service was analysed in order to indicate the recent trends in children attending different schools and nurseries in Shetland. Figure 2.14 shows the trend between Nursery, Primary and Secondary pupils in Shetland. The number of nursery pupils has increased, as with the number of primary pupils and the number of secondary pupils has declined over recent years.



Figure 2.14 School Rolls – Number of Nursery, Primary and Secondary Pupils



Source: Schools Service, Shetland Islands Council, 2021

**School Roll Totals** Table 2.12 shows the amalgamated school roll totals for the schools by housing market area. Generally, pupils attend schools in the same locality where they stay, but there are occasions where this is not the case.

Table 2.12 School Rolls Total – Nursery, Primary & Secondary

Housing Market Area	1981	1991	2001	2012	2017	2018	2019
Central	528	527	461	354	457	425	442
Lerwick & Bressay	1768	1741	1669	1598	1598	1600	1603
North	708	651	646	478	471	484	509
North Isles	630	482	470	384	389	376	384
South	537	503	536	514	526	518	510
West	233	214	298	268	305	313	304
<b>Total</b>	<b>4404</b>	<b>4118</b>	<b>4080</b>	<b>3596</b>	<b>3746</b>	<b>3716</b>	<b>3752</b>

Source: Schools Service, Shetland Islands Council, 2021

Table 2.13 Change in School Rolls – Nursery, Primary and Secondary

Housing Market Area	Proportion 1981	Proportion 2001	Proportion 2019	Difference 1981-2019	Difference 2001-2019
Central	12.00%	11.30%	11.80%	-0.20%	0.50%
Lerwick & Bressay	40.10%	40.90%	42.70%	2.60%	1.80%
North	16.10%	15.80%	13.60%	-2.50%	-2.30%
North Isles	14.30%	11.50%	10.20%	-4.10%	-1.30%
South	12.20%	13.10%	13.60%	1.40%	0.50%
West	5.30%	7.30%	8.10%	2.80%	0.80%
Total	100.00%	100%	100%		

Source: Schools Service, Shetland Islands Council, 2021

Across the areas, school pupil numbers have decreased in North and North Isles. There has been increases in the other areas since 2001, the highest being in Lerwick. It is worth noting that the secondary department in Scalloway closed in 2011 so the pupils who would normally have gone to that school were moved to Lerwick.

**School Roll Projections** – The amalgamation of school projections by housing market area are included in Table 2.14 for 2022/2023.

Table 2.14 Projected School Roll Proportions for Primary & Secondary Schools by Housing Market Area for 2022/2023

Housing Market Area	%
Central	10.8%
Lerwick & Bressay	44.0%
North I	14.6%
North Isles	9.3%
South	13.0%
West	8.3%
Total	100%

Source: Schools Service, Shetland Islands Council, 2021

## 2.5 - House Prices

The Registers of Scotland provide data on house price sales. The full dataset of information is used for a comparison with the other local authorities and nationally.

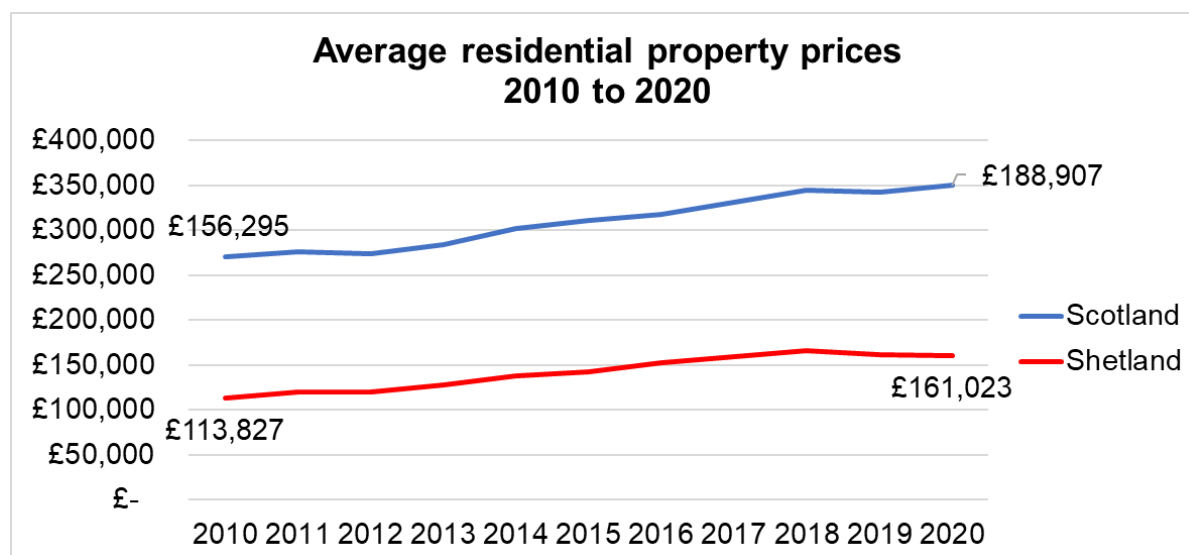
**House Sale Prices by Local Authority** Starting at local authority level, the average house prices for Shetland and Scotland are detailed in Table 2.15 and shown in Figure 2.15.

Table 2.15 Average House Prices

Year	Shetland	Scotland
2010	£ 113,827	£ 156,295
2011	£ 120,424	£ 156,185
2012	£ 119,735	£ 154,282
2013	£ 127,433	£ 156,735
2014	£ 138,344	£ 163,533
2015	£ 142,028	£ 168,723
2016	£ 152,241	£ 165,670
2017	£ 158,944	£ 172,272
2018	£ 165,719	£ 178,568
2019	£ 161,318	£ 180,877
2020	£ 161,023	£ 188,907

Source: Records of Scotland, 2021

Figure 2.15 Average House Prices



Source: Records of Scotland, 2021

In summary, this shows that the average house price in Shetland has increased most years up until 2018 where there has been a decrease in the last 2 years.

**House Sale Prices by Housing Market Area** In order to assess the house sale prices for each Housing Market Area, analysis was carried out on data provided by the CHMA, with the source of the information from the Registers of Scotland. Table 2.16 details the mean and median house sale prices for 2020.

The trend of median and mean house price sales and recorded sales are included in Tables 2.17, 2.18 and 2.19.

**Table 2.16 Median and Mean House Sale Prices by Housing Market Areas**

<b>Locality</b>	<b>Mean</b>	<b>Median</b>
Central	£169,350	£158,000
Lerwick & Bressay	£184,631	£170,000
North Isles	£90,059	£80,000
North	£158,234	£139,500
South	£164,354	£147,000
West	£164,886	£157,500
Shetland	£142,082	£135,000

Source: Registers of Scotland, 2021

**Table 2.17 Median House Sale Price by Year and Housing Market Area**

<b>Housing Market Area</b>	<b>2010</b>	<b>2016</b>	<b>2018</b>
Central Mainland	£106,000	£150,000	£158,000
Lerwick & Bressay	£120,000	£156,928	£170,000
North Isles	£77,000	£75,000	£80,000
North Mainland	£97,000	£125,000	£139,000
South Mainland	£102,500	£165,000	£147,000
West Mainland	£100,201	£128,075	£157,500

Source: Registers of Scotland, 2021

**Table 2.18 Shetland Median House Price Sale by Year and Recorded Sales**

<b>Shetland</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>
Median	£126,000	£135,000	£150,000	£153,000	£156,000	£155,000	£152,500
Recorded sales	319	308	309	319	286	300	254

Source: Registers of Scotland, 2021

**Table 2.19 Mean House Sale Price by Year and Housing Market Area**

<b>Shetland</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>
Mean	£138,344	£141,548	£152,567	£158,565	£165,245	£160,947	£160,799
Recorded sales	319	308	309	319	286	300	254

Source: Registers of Scotland, 2021

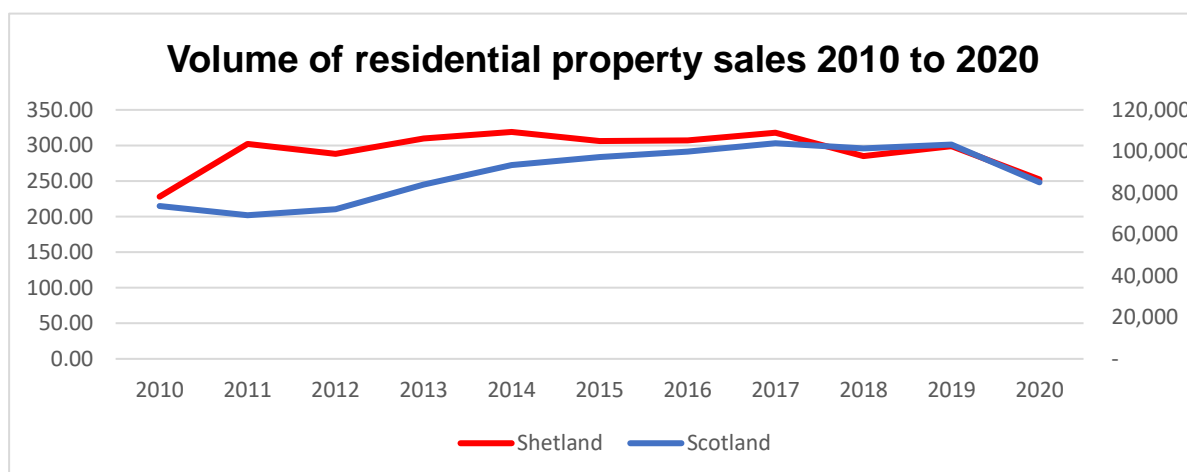
**House Sales by Housing Market Areas** Analysis was carried out on the number of house sales across the Housing Market Areas as shown in Table 2.20. Over the 8 year period to 2016, the housing market area with most sales across Shetland over the period was Lerwick & Bressay where 33% of overall sales took place. This was followed by South and Central with 19% each, North Mainland and North Isles at 11% and West 7%. This demonstrates the difference across the Housing Market Areas and how a small number of sales can make a significant difference to average house prices.

Table 2.20 Number of House Sales by Housing Market Area

Housing Market Area	2009	2010	2011	2012	2013	2014	2015	2016
Central Mainland	51	37	50	51	45	48	39	46
Lerwick & Bressay	91	77	107	81	74	75	67	79
North Isles	26	21	33	34	22	30	26	22
North Mainland	27	21	33	30	18	27	44	19
South Mainland	58	34	37	61	37	39	54	45
West Mainland	24	9	20	17	12	16	21	14
<b>Total sales</b>	<b>277</b>	<b>199</b>	<b>280</b>	<b>274</b>	<b>208</b>	<b>235</b>	<b>251</b>	<b>228</b>

Source: Registers of Scotland, 2016

Figure 2.16 Volume of Sales



Source: Register of Scotland, 2020

## 2.6 - Private Rents

Discussions were held with Letting agents within Shetland about their experience on the letting situation in Shetland. Conversations were held in September 2015, June 2017 and March 2021. According to the Lettings Agents over the years, there had been a reduction in company lets and there had been an increase in private lets. The greatest demand continued to be for properties in Lerwick, and the size mostly one or two bed roomed.

In 2017, the rents charged by Lettings Agents per month in Lerwick depending on bedroom size as follows - 1-bed = £500-£750, 2-bed = £650-£900, 3-bed = £695, 4-bed = £1000-£1350, 5-bed = £1500. Rental properties outwith Lerwick included 2-bed in South at £500-£600.

In 2021, the rents charged by Lettings Agents per month in Lerwick depending on bedroom size averaged as follows – 1-bed = £450-£650, 2-bed = £650-850, 3-bed = £750-£1,100, 5-bed = £1,100-£1,400. Rental properties outwith Lerwick ranged from 1-bed = £625, 2-bed = £495-£750, 3-bed = £650-£950.

### **Number of Housing Applications Applying from Private Rented Accommodation in Shetland**

Analysis was carried out on information that was available through SIC housing application forms on the rent paid for private rented accommodation in Shetland. The analysis was carried out by SIC Housing Staff as a one off project to provide evidence on the private rented sector, as this is an area where it is considered there to be a lack of data available. The housing management system was interrogated and reports were created for analysis.

Housing applications received from private rented accommodation in Shetland during 2017/2018 to 2020/2021 were used in the analysis. Only housing application details included rental information was included. Of the 154 applications, the highest number at 78 (51%) were from the Lerwick & Bressay housing market area, followed by 21 (14%) from Central and 20 (13%) from South. Details are included in Table 2.21

Table 2.21 Number of SIC Housing Applications applying from private rented accommodation in Shetland

Housing Market Area	Total	%
Central	21	14%
Lerwick & Bressay	78	51%
North	14	9%
North Isles	12	8%
South	20	13%
West	9	6%
<b>Total</b>	<b>154</b>	<b>100%</b>

Source: Housing Service, Shetland Islands Council, 2021

**Size of Private Rented Accommodation** The size of private rented accommodation SIC applicants applied from was considered and the majority 66 (43%) were applying from a 2-bed property with 44 (29%) applying from both 1-bed and 3-bed properties.

**Rents Charged in Private Rented Accommodation** The analysis showed the highest rents were being charged in the Lerwick & Bressay housing market area. Table 2.22 provides the detail of the minimum and maximum rents charged.

In our sample, the highest monthly private rent charged was £850 for a 3-bed private rented property in Lerwick. This compares to previous analysis in 2017 when £1,400 was charged for a 3-bed in North, followed by £1,300 for a 3-bed in South, and £1,100 for a 3-bed in Lerwick.

Table 2.22 Monthly Rent (by Range) Paid by SIC Housing Applicants Applying from Private Rented Accommodation by Locality and Bedroom Size (£)

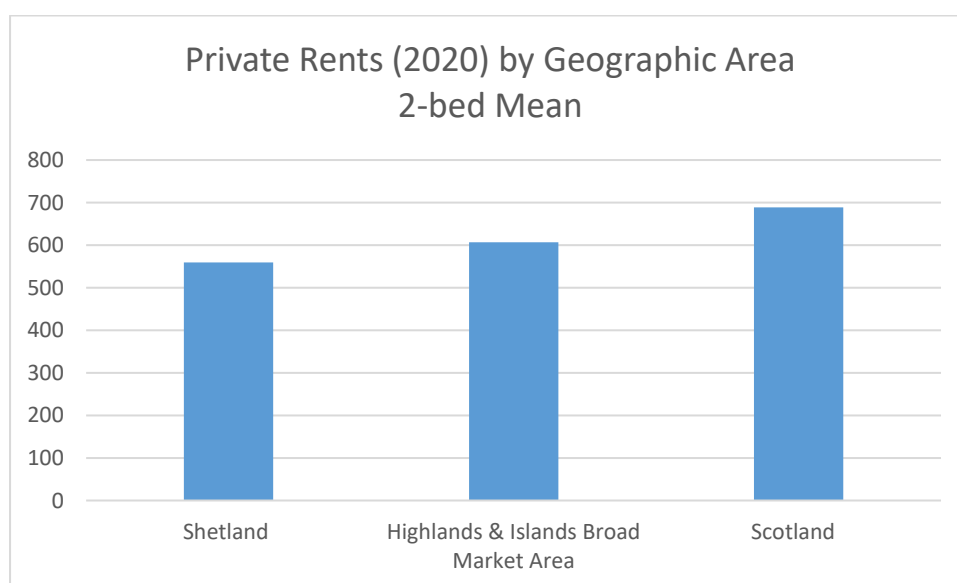
Housing Market Area	1-bed	2-bed	3-bed
Central	250-600	350-650	440-750
Lerwick & Bressay	100-850	363-775	275-850
North	400-600	475-750	400-550
North Isles	350	250-550	300-520
South	350-700	350-700	225-700
West	300-600	400-650	400

Source: Housing Service, Shetland Islands Council 2021

**Comparison with other Private Rental Data** ONS provides rental income based on Broad Market Areas, as detailed in Figure 17 and Figure 18. Shetland data is included in the Highlands & Islands Broad Market Area but the Shetland data cannot be extracted exclusively. Average (mean) 2 bedroom rents in Highland and Islands have been lower than the Scotland average in each year since 2010, with the average rent in 2021 being £612 per month, compared to the Scotland average of £693. Between 2020 and 2021 average rents have increased for 2 bedroom (0.8%), 3 bedroom (1.4%) and 4 bedroom (1.2%) properties, whilst average rents have shown little change for 1 bedroom (0.2%) and 1 bedroom shared properties (0.2%), which compares to CPI inflation of 1.5% across this time period. Although some caution is needed when interpreting the changes over time for the 4 bedroom property size category, given the smaller sample numbers for this category. But, as the ONS information includes an area much bigger than Shetland, it is difficult to compare.

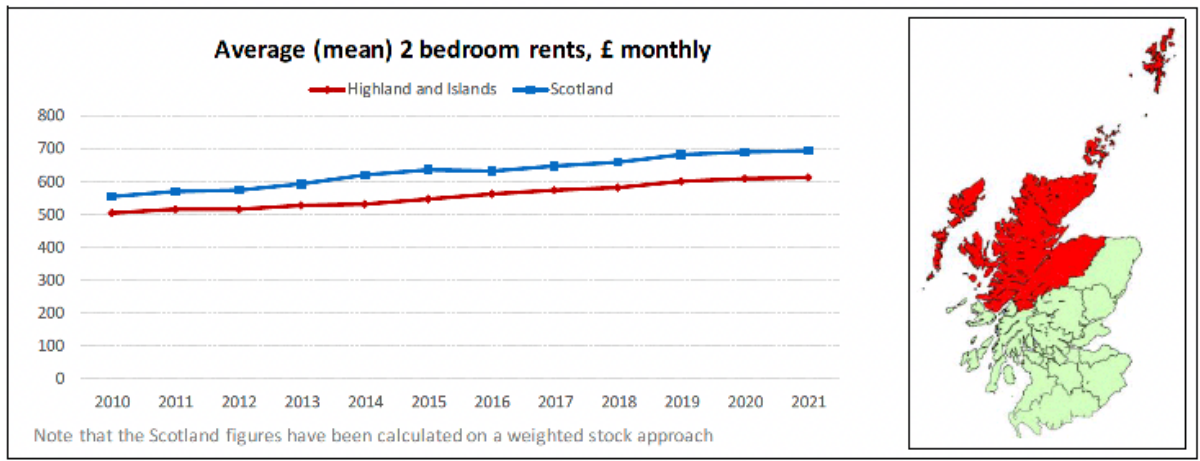
Both sources show that the private rented accommodation in Shetland is higher than in other areas with the local data showing higher rent than the published data that does not stipulate the situation in Shetland. Further information on this is in Chapter 4 of the HNDA.

Figure 2.17 Private Rents Charged by Geographic Area



Source: SIC Housing Service, ONS, 2021

Figure 2.18 Average Private 2bed Rents by Broad Market Area



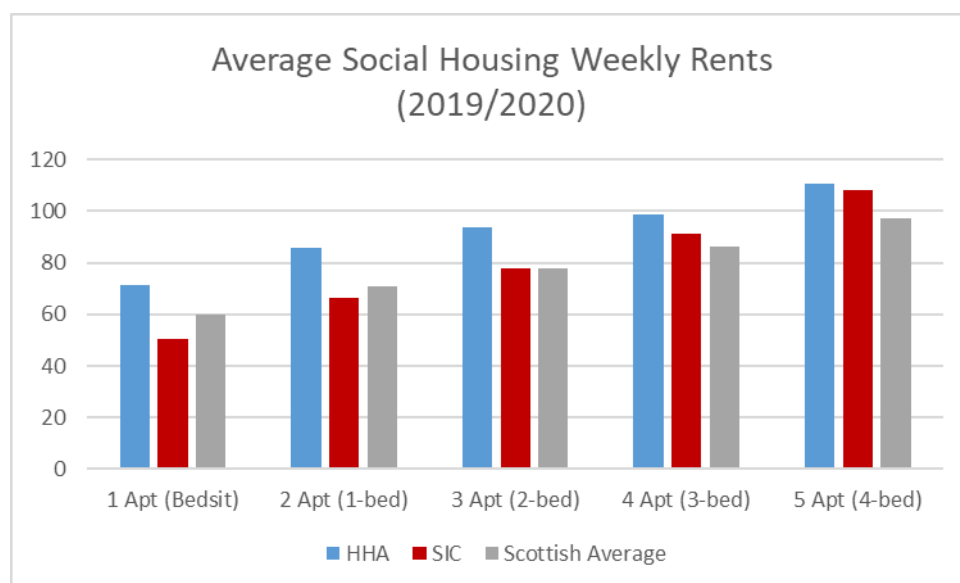
Source, ONS, 2021



## 2.7 - Social Housing Rents

The Scottish Housing Regulator annual return (ARC) provides detail on the weekly average rent charged by social landlords. The details for 2019/2020 average weekly rents charged by Hjalmland Housing Association, Shetland Islands Council and the average across Scotland are shown in Figure 2.17. Please note that some service charges are included in these figures which may not always lead to the figures being directly comparable.

Figure 2.19 Average Social Housing Weekly Rents



Source: Scottish Housing Regulator, & Scottish Housing Network, 2020

Considering the rents charged by Hjalmland Housing Association and the Shetland Islands Council, the housing association charges by size are higher. The Scottish average is higher for smaller properties for both HHA and SIC properties, but lower for larger properties.

**Local Housing Allowance Rates** Local Housing Allowance (LHA) rates are used to calculate Housing Benefit for tenants renting from private landlords. LHA rates relate to the area in which you make your claim. These areas are called broad rental market areas (BRMA). A BRMA is where a person could reasonably be expected to live taking into account access to facilities and services. Shetland is included in the Highlands and Islands BRMA.

The average weekly charges by size for social rents, private rents and local housing allowance rates were then considered. The average private rental figures were calculated on the SIC analysis figures for 2019/2020.

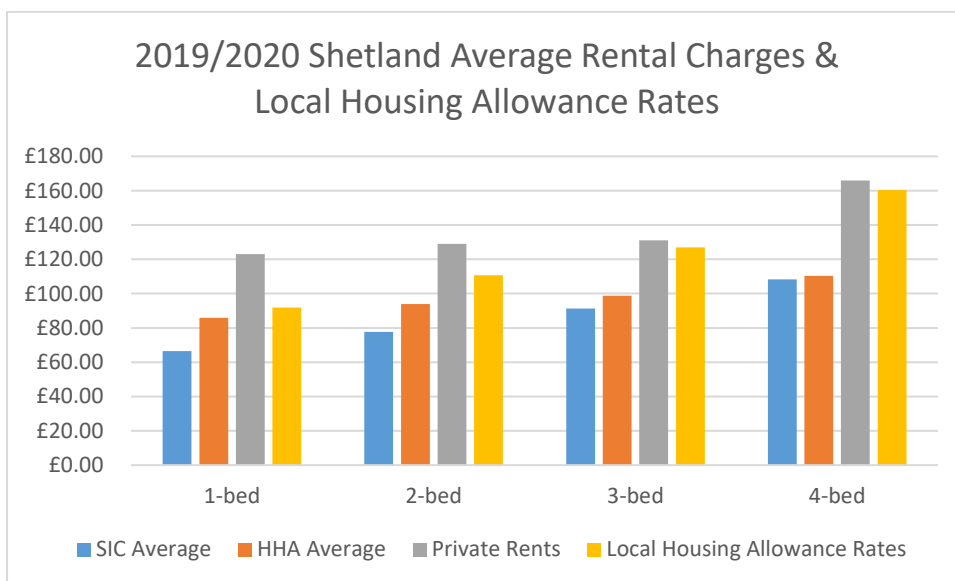
The findings are included in Table 2.23 and Figure 2.18. This shows that the local housing allowance rates are higher than the average social rents for all sizes of properties, but is lower than the private rents of all sizes.

Table 2.23 Average Weekly Charges 2019/2020 by Size –SIC, HHA, Private Rents, Local Housing Allowance Rates

Average Weekly Charges	SIC Average	HHA Average	Private Rents	Local Housing Allowance Rates
1-bed	£66.42	£85.81	£123.00	£91.81
2-bed	£77.66	£93.92	£129.00	£110.72
3-bed	£91.33	£98.75	£131.00	£126.92
4-bed	£108.21	£110.40	£166.00	£160.38

Source: Housing Service, Shetland Islands Council & Hjaltland Housing Association, Scottish Government, 2020

Figure 2.20 Average Rental Charges



Source: Housing Service, Shetland Islands Council & Hjaltland Housing Association, Scottish Government, 2020

## 2.8 - Income

The HNDA Tool provides information regarding income which is provided by the Scottish Government.

**Household Income** - CACI Paycheck income data was used for the income analysis. CACI Paycheck provide valuable information regarding household income which can be broken down at the housing market area level. The applicable copyright notices can be found at <https://www.caci.co.uk/copyrightnotices.pdf>.

In 2020, the mean income for Shetland was £39,097. Further details on other benchmarking comparators are in Table 2.24.

Table 2.24 Household Income

Area	Total Households	Mean Income	Median Income	Lower Quartile	Upper Quartile
Shetland	10,425	£39,097	£31,898	£18,338	£52,459
Orkney	10,497	£38,800	£31,581	£18,257	£51,921
Eilean Siar	12,737	£34,436	£27,577	£16,141	£45,767
Highland	109,242	£40,334	£32,889	£18,878	£54,022
Scotland	2,500,236	£38,817	£30,666	£17,115	£52,354

Source: CACI Paycheck, 2020

Table 2.25 Household Income – CACI & Scottish Government Income Data Sources

Income Level	CACI	Scottish Government	Difference
Median Income	31,898	27,560	4,338
Lower Quartile	18,338	16,640	1,698
Upper Quartile	52,459	44,720	7,739

Source: CACI Paycheck, 2020 and Scottish Government 2018

The reasons CACI has been chosen as the most relevant data source is because this data is available at postcode level and that means it is available at a lower level and can be aggregated to housing market area. The CACI Paycheck dataset is available at 2020, whereas the Scottish Government information is from 2018.

**Income by Housing Market Area** - Analysis was carried out by Housing Market Area, and details are included in Table 2.25.

The HNDA Tool calculates the income information using the median and lower quartile figures.

The Housing Market Areas with the highest Median Incomes are in the South and Central, followed by West Mainland, North Isles Lerwick & Bressay, North Isles and North Mainland.

The Housing Market Areas with the highest lower quartile incomes are South and Central followed by West, North Isles, Lerwick & Bressay and North Mainland.

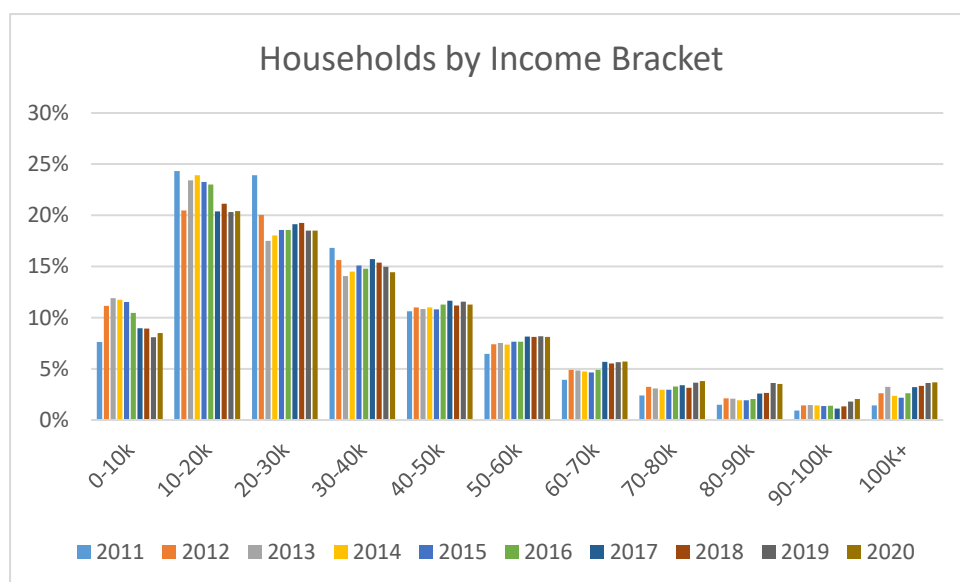
Table 2.26 Housing Market Areas CACI Income Summary 2020

Housing Market Area	Total Households	Mean Income	Median Income	Lower Quartile
Central Mainland	1,773	£42,490	£35,262	£20,628
Lerwick & Bressay	3,431	£37,644	£30,204	£17,476
North Isles	1,249	£32,249	£25,706	£14,827
North Mainland	1,406	£37,603	£30,676	£17,758
South Mainland	1,656	£44,929	£37,960	£22,199
West Mainland	827	£38,685	£32,225	£18,592

Source: CACI Paycheck, 2020

The proportion of Households in Shetland by Income bracket Figure 2.19 shows comparison data available between 2011-2020.

Figure 2.21 Proportion of Households Income by Bracket (10K)



Source: CACI Paycheck, 2020

**Household Median** Income Analysis was carried out on the household median income by Housing Market Area. Details are in Table 2.26. Considering the information available from 2016 to 2020, the Shetland median income has increased by % per annum.

The housing market areas with the highest increases are Lerwick & Bressay and North Isles , with North, West, Central and South being below the annual median increase.

Table 2.27 Household Median Incomes by Housing Market Area

Housing Market Area	2016	2020	Increase	2016 to 2020 % increase
Central	£32,920	£35,262	£2,342	7.1%
Lerwick & Bressay	£26,578	£30,204	£3,626	13.6%
North	£28,108	£30,676	£2,568	9.1%

North Isles	£22,595	£25,706	£3,111	13.8%
South	£35,074	£37,960	£2,886	8.2%
West	£28,826	£32,225	£3,399	11.8%
Shetland	£28,842	£31,898	£3,056	10.6%

Source: CACI, 2021

**House Sales Affordability Ratio** Analysis was carried out on the median income levels within the housing market areas and the average house price. The details show that the affordability ratios range is from 2.6 in the North Isles to 5.4 in the Lerwick & Bressay housing market area.

Table 2.28 House Price Affordability Ratio

Housing Market Area	Income	Price	Affordability Ratio
Central Mainland	● 35,467	● 158,943	4.5
Lerwick & Bressay	● 30,549	● 166,284	5.4
North Isles	● 30,805	● 79,472	2.6
North Mainland	● 25,860	● 132,453	5.1
South Mainland	● 37,568	● 174,838	4.7
West Mainland	● 31,146	● 135,711	4.4
House prices v Income (2019 Data)			

**Private Rented Affordability Ratio** Analysis was carried out on the costs of private renting and affordability. With the annual cost of 2-bed rental, the ratio is 2.73 for households with lower quartile, 4.76 for median income and 7.82 for upper quartile income.

**Table 2.29 Annual Income Level compared to annual 2bed rent prices**

Median Income	Lower Quartile Income	Upper Quartile Income
£31,898	£18,338	£52,459
£6708	£6708	£6708
<b>4.76</b>	<b>2.73</b>	<b>7.82</b>

Further analysis carried out demonstrates that based on the 25% rent affordability ratio, private rents are considered affordable on the median income and upper quartile but unaffordable on the lower quartile income.

**Table 2.30 Annual Income**

	Median Income	Lower Quartile Income	Upper Quartile Income
	£31,898	£18,338	£52,459
Salary required to be able to afford current rent (Average Rents)	£26,832	£26,832	£26,832
	119%	68%	196%

## 2.9 - Affordability and Tackling Inequalities

**Shetland Commission on Tackling Inequalities** The Shetland Partnership Board established a Commission on Tackling Inequalities in 2015. Information was drawn from published data and reports and evidence from a range of agencies and communities within Shetland and beyond. The range of evidence gathered was on baseline research, household finances, fuel poverty, transport, geography and communities, early intervention and prevention. The Commission defined three main dimensions to socio-economic inequalities in the context of Shetland - the money we have; the people we are and the places we live. These dimensions formed the foundation for the Shetland Partnership's plan. A copy of the full report including evidence, solutions and recommendations is available here: [on-da-level-achieving-a-fair-shetland](#)

**The Minimum Income Standard for Remote Rural Scotland report.** In 2013, Highlands & Islands Enterprise, Shetland Islands Council and other public agencies commissioned a study to establish a minimum income standard for remote rural Scotland. The study found that the budgets required by households to achieve a minimum acceptable standard in living in remote rural Scotland were typically 10-40% higher than elsewhere in the UK. For households in more remote island locations, these additional costs could exceed 40%.

A policy update was reported in October 2016 which explores the cost drivers further. Included in the update is that the costs of travelling, heating one's home and paying for goods and delivery are much higher for many residents in these areas, especially those in the remotest areas.

**Living Well in a High Cost Economy** Ipsos MORI carried out analysis on households in working poverty following this being identified as a growing issue in Shetland. Among households with at least one working adult, it was estimated that 6% of people in working households in Shetland were in poverty, compared with 10% in Scotland, 9% in Eilean Siar and 11% in Orkney. However, the extent to which poverty was experienced by working households was quite similar in Shetland and Scotland.

Both the Minimum Income Standard for Remote Rural Scotland Policy update and the Living Well in a High Cost Economy report can be accessed here -

[Shetland Partnership – Shetland Islands Council](#)

**Affordability for Young People** A Young People in Shetland Attitudes and Aspirations Research Report was published in September 2015 by Highlands & Islands Enterprise which included information on Housing. Within the report, it concluded the cost of living is a more serious issue for young people in Shetland compared with elsewhere in the Highlands & Islands region. Less than one in four (24%) believe costs are affordable, compared to 41% across the Highlands & Islands. The cost of living is felt most acutely for those in Lerwick, where just one in seven (14%) believe living costs are affordable. For those living outwith Lerwick this is 33%. Less than one in four (24%) believe living costs are affordable, compared to 41% across the Highlands & Islands. The cost of living is felt most acutely in Lerwick, where just one in seven (14%) consider it affordable. The cost of living is ranked second in terms of the most important issues, far higher than the ranking of 5 on average across the Highlands & Islands. The Report can be viewed here -

[https://www.hie.co.uk/media/3110/youngpluspeopleplusinplusshetland\\_plusattitudesplusandplusaspirations.pdf](https://www.hie.co.uk/media/3110/youngpluspeopleplusinplusshetland_plusattitudesplusandplusaspirations.pdf)

## 2.10 - Economy

**Economic Drivers in Shetland** The Shetland economy is comprised of a mix of traditional industries, such as fishing and agriculture, alongside a global oil, gas and energy sector, a high degree of public service activity, and prominent industries such as aquaculture and construction. Future growth industries include decommissioning, space and clean energy, while tourism is an increasingly important contributor to the local economy, but the cost of getting to Shetland and the demands on accommodation have impacts on availability and accessibility. Periods of high work activity, usually around construction of facilities, lead to increases in available work, increases in transient/temporary workforce, demands for short term accommodation and high wages. Shetland has consistently had amongst the lowest national unemployment rate for many years.

All of these have multiple impacts on the housing market. During periods of intense construction, workers may move to higher-paid, short term contracts causing recruitment and retention problems for local builders, this impacts on house building contracts as they are less attractive or achievable. The construction sector generally view themselves as builders and not developers, so speculative house building is not prevalent. Also, the accommodation demands to house a transient workforce can quickly saturate the fairly limited private rented market and force rents to increase to levels that are considered unaffordable. Previous recent activity has seen saturation in the private rented market through company lets and the need for temporary workforces to be accommodated in floatel type accommodation to meet industry needs.

The high wage economy masks the extent of deprivation across the isles and the ratio of 'working poor' is increasing. Those employed in the traditional sectors are generally having to rely on more than one source of income in the household. The public sector workforce in Shetland is shrinking due to budget reductions. A number of key professional posts in the public sector have been difficult to recruit to, often with lack of accommodation being cited as a reason for candidates not taking up posts.

The Highlands and Islands Area Profile for Shetland produced by HIE can be accessed here - [Highlands and Islands area profiles 2020 | HIE](#)

Also, the SIC Economic Strategy for 2018-2022 can be accessed here - [Economic information and analysis – Shetland Islands Council](#)

**Employment** NOMIS provides labour supply figures based on the ONS annual population survey. It is reported that based on people aged 16-64, the % of economically active people in Shetland (74.6%) is slightly lower than the % in Scotland and Great Britain, although Shetland has a higher rate of employment. Further details including the gender breakdown is provided in Table 2.30 and Figure 2.20. The trend shows that Shetland has historically had a higher % of economically active people compared to Scotland or Great Britain overall.

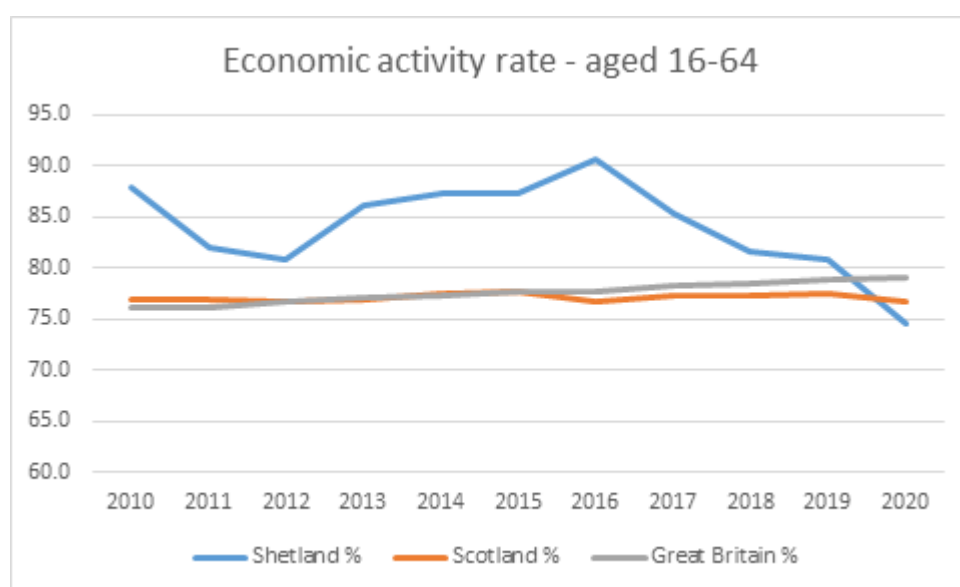


Table 2.29 Employment and Unemployment

Employment & Unemployment (Jan20-Dec20)	Shetland	Shetland	Scotland	Great Britain
All people	(numbers)	(%)	(%)	(%)
Economically active	11,600	74.6	76.8	79.0
In employment	11,600	74.6	73.4	75.2
Employees	9,900	66.0	65.2	65.1

Source: NOMIS, Office of National Statistics, 2021

Figure 2.22 All People – Economically Active



Source: NOMIS, Office of National Statistics, 2020

**Out of Work Benefits** The Office for National Statistics (ONS) provides labour market profiles for local authorities which includes information on out of work benefits. The Claimant Count is the number of people claiming benefit principally for the reason of being unemployed. This is measured by combining the number of people claiming Jobseeker's Allowance (JSA) and National Insurance credits with the number of people receiving Universal Credit principally for the reason of being unemployed. Claimants declare that they are out of work, capable of, available for and actively seeking work during the week in which the claim is made. Table 2.27 demonstrates how much lower Shetland figures and percentages are compared with Scotland and Great Britain.

Table 2.30 Out of Work Benefits

Year	Shetland No	Shetland %	Scotland %	Great Britain %
Apr-18	130	0.9	2.6	2.2
Apr-19	205	1.5	3.1	2.7
Apr-20	430	3.1	5.4	5.1
Apr-21	435	3.1	5.9	6.3
Jan-22	280	2.0	4.0	4.4

Source: Nomis, Office for National Statistics, February 2022

**Shetland Employment Survey** In 2017, the Shetland Employment Survey was carried out which was a comprehensive survey of employers in Shetland intended to provide information on all aspects of local employment. Some of the findings from the survey include:

- FTE jobs in Shetland decreased between 2011 and 2017
- 29% fewer FTE jobs in public administration in 2017 than in 2011
- 85% of employers in Shetland are 'micro' sized with <10 employees
- 53% of full time equivalent jobs (FTE) were based in Lerwick, followed by 10% in the North mainland area
- The largest employment sector in Shetland by FTE jobs – Public Administration (21%), Wholesale & Retail (13%), Construction (8%)
- 20% of employers stated that they could not fill vacancies due to a lack of local labour

**Shetland Economic Accounts 2017/18** The Shetland Economic Accounts were produced by the Fraser of Allander Institute and measured the flow of capital in the local economy in the financial year 2017/18:

- Total economic output in 2017 was £1.26bn - the sectors which accounted for most economic output were Aquaculture (£244m), Fish processing (£125m), Public Administration (£82m), Retail (£80m) and Construction (£76m).
- In 2017 Shetland's GRDP (gross regional domestic product) was £25,442 per head, 0.5% above Scotland.
- Between 2011 and 2017 there was a £47.8 million increase in GRDP in real terms.
- Average household income in Shetland was estimated to be £41,322, a 7.56% increase in nominal terms since 2011 but a 2.96% decrease in real terms, indicating that household income growth was slower than the national inflation rate.

Despite a reasonably strong economic base, both Brexit and Covid 19 exert unprecedented challenges on the Shetland economy. Whilst the unemployment claimant count in Shetland is still half the Scottish average (3.7%), claimants increased by 169% between July 2019 and July 2020 as the global pandemic influenced economic activity. Whilst the Shetland economy is characterised by high median incomes and low unemployment levels, incomes are lower in rural and remote areas and high levels of under employment are evident.

The public sector workforce in Shetland is shrinking due to budget reductions. A number of key professional posts in the public sector have been difficult to recruit to, often with lack of accommodation being cited as a reason for candidates not taking up posts. With Shetland having an ageing population it also has an ageing workforce and a need to encourage young people to stay or to return where they have been away to study. There are currently very limited housing options for this group.

**Local Brexit Vulnerabilities in Scotland (2019) Scottish Government** This research into the economic impact of Brexit on local authorities defines Shetland as the second most vulnerable Council area in Scotland. The research estimates that 50% of communities in Shetland data zones are within the most vulnerable communities in Scotland to Brexit impacts. This reflects the high concentration of the Shetland workforce in Brexit vulnerable sectors such as fishing and agriculture; relatively high European CAP funding receipts and poorer access to services.

**Islands Growth Deal** - In March 2021, a £335M [Islands Growth Deal](#) was announced by the UK and Scottish Governments. The Deal, founded on £100M of public investment, will drive a 10 year economic development programme for Orkney, Shetland and the Outer Hebrides with a focus on the transition to net zero and supporting the creation of sustainable, thriving communities. Key investment priorities include net zero carbon energy and infrastructure, innovation, tourism, skills, creative industries, food and drink, aquaculture and housing. The Islands Growth Deal projects are supported by a wide range of partners from across the public, private and academic sectors who together will invest up to a further £235million to deliver these projects, which are forecast to create over 1,300 sustainable jobs across the three Island groups, with significant local developments supported in Shetland:

- Realising their plans as set out in the Islands Growth Deal will mean that all three islands will advance their capacity to provide a substantial part of Scotland's and the UK's future energy requirements. The **Shetland Clean Energy Project** sets out Shetland's particular ambitions for transforming energy use and calculates that the production of green hydrogen is the preferred way forward to provide clean fuel, reduce carbon significantly and provide opportunities for business development and skilled islands-based employment.
- Shetland has been welcoming decommissioning projects since the early 2000s and has a strong reputation in the sector. **The Dales Voe Ultra-Deep Water Port** will increase the opportunity to secure more of the growing decommissioning sector and the developing offshore renewable sector, providing the UK with a capability to match that found overseas. Dales Voe has been identified as the optimal location in the UK for an ultra-deep water decommissioning facility due to its sheltered approach, naturally deep-water channels and its close geographical proximity to both the existing oil and gas infrastructure and the locations that will be used for future offshore wind and low carbon energy sector.
- The **Shellvolution** project has been designed as a new and innovative means of enabling expansion in the low carbon and sustainable mussel farming sector in Shetland, and more widely in Scotland. Through a phased programme of research and development, focusing on better ways to farm within the marine environment, small businesses in the sector will be able to share in an anticipated growth in output to 18,000 tonnes by 2037, increasing the productivity and resilience of existing farm sites, and developing new locations.
- The **Shetland Space R&D** project will build upon the developing space offering across Shetland through the Saxavord Space Centre that will host the UK Space Agency's Pathfinder Launch with Lockheed Martin in line with the shared ambitions of both the Scottish and UK Governments. The project will be established at the Ordale Airfield, in Unst, and provide a dedicated commercial development ready campus to accommodate domestic and international companies seeking to undertake associated launch activity as well as support the provision of high quality academic research, innovation and STEM activities that will support a growing space ecosystem, supporting the ambition to become a leading space nation.

- Led by the University of the Highlands and Islands, working with academic partners and other universities (namely Robert Gordon University and Heriot-Watt University), the **TalEntEdIslands Programme** will be aligned to the UHI Islands Strategy and Islands Forum. Working closely with the Islands Centre for Net Zero, and other joint and specific Islands Growth Deal projects, it will build the skills and talent pipeline needed, working with national and regional organisations, and paying specific attention to the inequalities arising as a result of COVID-19.
- The **Shetland Campus Redevelopment** project will make more learning opportunities available to more people in Shetland and the wider University of the Highlands and Islands area, helping to meet the training and skills development needs of current and emerging key sectors. This will contribute to economic development and inclusive growth in the islands, attracting and retaining young people and new learners to the isles, as well as supporting the zero-carbon economy.
- The **Shetland Knab Redevelopment** project aims to go beyond creating a simple housing project with ancillary services, by delivering a mixed-use site that embeds living and ageing well, creative innovation, wellbeing and a dynamic use of public space alongside future fit housing that enables a flexible approach to work and life. The development will enhance the existing offer of Lerwick and will provide additional facilities that will support the ambition of Shetland into the future. The development will not only enhance the life of the future residents of the site, but also those who interact with the space both as residents and visitors.

This chapter includes the demographic, affordability and economic issues relating to the Housing Market in Shetland. Using the HNDA Tool, in Chapter 4, there have been 4 scenarios chosen and two of these include +0.25% growth which is because of the work that is included in the Islands Growth Deal, leading to increased economic activity forecasting significant local developments supported in Shetland. Below details how each of the HNDA scenarios have been shaped by the demographic, affordability and economic factors detailed in this chapter.

- The Default Scenario is all pre-populated information included in the HNDA Tool.
- Scenario 1 includes all pre-populated information included in the HNDA Tool, with the Existing Need altered due to local evidence available. The household projections chosen for this scenario is 2018 Principal Migration as this is the base for establishing the demographics for the households in Shetland. The income, growth and distribution choices were based on the economic evidence and historic trends. The prices and affordability choices were based on evidence of house prices and the limited availability of the private sector.
- Scenario 2A includes all pre-populated information included in the HNDA Tool, with Existing Need altered and using 2018 High Migration figure instead of 2018 Principal. The household projections chosen for this scenario is 2018 High Migration which is based on the projected increase in economic activity and the need for workforce beyond what is available in the islands. The income, growth and distribution choices were based on the economic evidence and historic trends. The prices and affordability choices were based on evidence of house prices and the limited availability of the private sector.
- Scenario 7 includes a growth % of 0.25% which is linked to the Island Growth Deal proposals for the different economic opportunities in the pipeline for Shetland. CACI Paycheck information was chosen as this information is available at postcode level and is available in a more recent timescale which reflects the Greater Inequality option for income distribution. Changes were also made to Trend Growth and Rent Growth Assumption to be

Moderately Below Real Terms Growth. The household projections chosen for this scenario is 2018 Principal Migration. The reason this scenario was chosen was due to the Islands Growth deal. It is considered realistic and prudent as projected household growth is relatively modest but feel confident that we can move beyond this and be more ambitious because the economic impact will encourage migration to Shetland because of new employment opportunities. This reflects the pattern of the economic activity cycle which is not generated from council or public policy, which has direct impacts on the housing market through cycles of high demand”.

## CHAPTER 3 Housing Stock Profile, Pressures and Management Areas

### Key Issues Table

<p>Housing (condition) quality</p>	<p>In general, the housing stock in Shetland is of good quality with a very low number of below tolerable standard stock.</p> <p>High level of fuel poverty, particularly in the more remote and rural areas.</p> <p>Level of under-occupation in private sector will have an impact on future property condition.</p> <p>Shetland has no access to mains gas and therefore relies on electric and oil heating sources which are more expensive to operate.</p>
<p>Housing stock pressures</p>	<p>Continuing demand pressure on Lerwick and Central areas across all tenures.</p> <p>Although there is high number of relets in Lerwick, due to the level of housing need there are a number of applicants who are unlikely to have any chance of being housed.</p> <p>97% of housing applicants applying from Lerwick &amp; Bressay have chosen to remain in this HMA which is the highest % across all areas.</p> <p>92% of those in temporary accommodation have chosen only to be rehoused in Lerwick.</p> <p>Due to majority of council stock built in the 1970s being family sized properties, demand for smaller sized households combined with welfare reform changes, adds to the pressure for more smaller sized properties across all areas and tenures.</p> <p>A housing options approach has been proven to reduce housing need before crisis point at risk of homelessness.</p> <p>Recent volatility in the private rented sector has had a major impact on the housing market.</p> <p>7% of all dwellings are vacant, compared to 3.4% across Scotland.</p>

<p>Size, type, tenure and location of future social housing supply</p>	<p>Need for tenure diversification, particularly in the Lerwick &amp; Bressay and Central areas to enable the delivery of affordable housing options; mid market rents, low cost home ownership options.</p> <p>Ongoing review of our information and datasets to ensure that the future supply matches the housing needs in Shetland.</p>
<p>Sustaining communities e.g. using tenure diversification/ regeneration</p>	<p>Understanding the diversity of the Housing Market Areas and responding to their needs.</p> <p>The majority of new build completions are on windfall sites and are self build single plots.</p> <p>Exploring intermediate market solutions where there is a need and enabling appropriate local solutions.</p> <p>Supporting local groups within communities to explore and deliver their own solutions</p>

### 3.1 - Housing Stock

This chapter provides a detailed profile of the general dwelling stock in Shetland, across all tenures, and highlights the main pressures particularly within the social rented sector; including homelessness, mismatches of supply and demand, ineffective stock and poor condition.

A breakdown on the current housing stock within Shetland has been provided using the Scottish House Condition Survey which is regularly carried out. This is at a Shetland level and due to the small numbers involved, this cannot be replicated to housing market areas.

#### Scottish House Condition Survey 2017 - 2019

##### Owner occupied

- 73% of housing stock in Shetland is Owner occupied. 8,000 households (Scotland comparison 62%)
- 26% of Owner Occupied properties were built before 1945. 2,000 households. (Scotland comparison 32%)
- 3% of Owner Occupied dwellings are flats. (Scotland comparison 22%)
- 78% of Owner Occupied dwellings have 3+ bedrooms. 6,000 households. (Scotland comparison 65%)
- 54% of Owner Occupied dwellings exceed the minimum bedroom standard requirements by 2 or more bedrooms. (Scotland's comparison 46%)
- 2% of Owner Occupied dwellings are considered to be Below the Tolerable Standard (BTS). (Scotland comparison 1%)
- 66% of Owner Occupied dwellings fail the overall SHQS standard. (Scotland comparison 41%)

## Social Housing

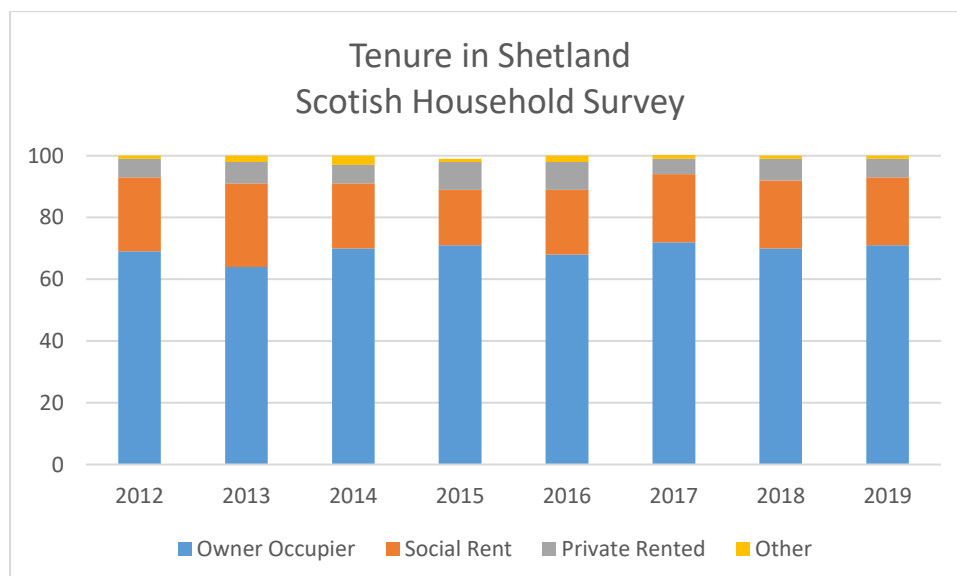
- 23% of housing stock in Shetland is Social Housing 2,000 households (Scotland Comparison 26%)
- 17% of Social Housing properties were built before 1945. (Scotland comparison 17%)
- 17% of Social Housing dwellings are flats. (Scotland comparison 56%)
- 37% of Social housing dwellings have 3+ bedrooms. 1,000 households. (Scotland comparison 25%)
- 11% of Social Housing dwellings exceed the minimum bedroom standard requirements by 2 or more bedrooms. (Scotland comparison 8%)
- 0% of Social Housing are considered below tolerable standard. (Scotland comparison 1%)
- 63% of Social Housing dwellings fail the overall SHQS standard. (Scotland comparison 38%)

## Private Rented

- 4% of housing stock in Shetland is Private Rented (Scotland comparison 13%)
- Insufficient data is available regarding the following:
  - Age of private rented accommodation (Scotland 49%)
  - Flats of private rented accommodation (Scotland 64%)
  - 3+ bedrooms of Private rented accommodation (Scotland 31%)
  - Under-occupation (Scotland 12%)
  - Below Tolerable Standard. (Scotland 3%)
  - Overall SHQS standard. (Scotland 52%)

A Scottish Household Survey is carried out annually. Chart 3.1 details the trend in % of stock by tenure. It shows that on average across the period, 69% were in owner occupied accommodation which, followed by 22% in social rented. This shows an average of 7% in private rented accommodation which is slightly higher than the most recent Scottish House Condition survey.

Figure 3.1 Tenure in Shetland – Scottish Household Survey



Source: Scottish Household Survey, 2019



**Housing Tenure** According to Census 2011, the 65.4% of properties in Shetland were owned compared to 62.0% in Scotland, followed by 23.7% social rented compared to 24.3% in Scotland and 11.0% private rented / living rent free compared to 13.7% in Scotland.

**Dwellings** The National Records of Scotland publish data regarding dwellings. At September 2020, there were 11,374 dwellings in Shetland. Table 3.1 shows how the total number of dwellings is broken down into occupied, vacant and second homes, compared to other similar local authority areas. Na h-Eileanan Siar has the highest percentage of vacant dwellings across Scotland. followed by Shetland at 7%. The percentage of second homes in Shetland is 1.5% which is higher than the Scottish average of 0.9% but lower than Highland (3.2%), Orkney (4.3%) and Na h-Eileanan Siar (5.3%).

**Table 3.1 Dwellings in Shetland and Other Local Authority Areas**

	Total number of dwellings	Occupied dwellings		Vacant dwellings		Second homes	
		No	%	No	%	No	%
Shetland Islands	11,374	10,401	91.4%	800	7.0%	173	1.5%
Orkney Islands	11,391	10,264	90.1%	640	5.6%	487	4.3%
Na h-Eileanan Siar	14,764	12,784	86.6%	1,192	8.1%	788	5.3%
Highland	119,918	111,597	93.1%	4,532	3.8%	3,789	3.2%
<b>Scotland</b>	<b>2,653,725</b>	<b>2,538,755</b>	<b>95.7%</b>	<b>90,499</b>	<b>3.4%</b>	<b>24,471</b>	<b>0.9%</b>

Source: National Records of Scotland, September 2020

The number of dwellings in Shetland in 2001 was 9,959. In 2010, there were 10,621, an increase of 7.2%, and by 2020 there had been an increase of 14.4% since 2001 to 11,374.

**Vacant Dwellings.** At September 2021, there were 770 vacant dwellings in Shetland which is 6.7% of all dwellings. These are categorised as ‘dwellings with unoccupied exemptions’ and ‘long term empty dwellings’.

Shetland has the joint highest proportion of long term empty properties in Scotland with Aberdeen City at 4.9%.

**Table 3.2 Vacant Dwellings in Shetland and Other Local Authority Areas**

	Total Vacant Dwellings	Dwellings with occupied exemptions		Long term empty dwellings	
		No	%	No	%
Shetland Islands	770	211	27%	559	73%
Orkney Islands	646	458	71%	188	29%
Na h-Eileanan Siar	1,138	542	48%	596	52%
Highland	4,755	1,980	42%	2,775	58%
<b>Scotland</b>	<b>88,335</b>	<b>44,569</b>	<b>50%</b>	<b>43,766</b>	<b>50%</b>

Source: National Records of Scotland, September 2020

**Vacant Dwellings.** Table 3.3 demonstrates the increasing trend in vacant dwellings recorded in Shetland by the National Records of Scotland.

Table 3.3 Vacant Dwellings in Shetland

	Total Dwellings	Dwellings with Occupied Exemptions	Long Term Empty	Total Vacant Dwellings	% Vacant Dwellings
Sep-13	10,852	239	378	617	5.7%
Sep-14	10,950	250	425	675	6.2%
Sep-15	11,021	198	476	674	6.1%
Sep-16	11,109	212	504	716	6.4%
Sep-17	11,180	213	507	720	6.4%
Sep-18	11,270	246	526	772	6.9%
Sep-19	11,305	227	524	751	6.6%
Sep-20	11,374	208	592	800	7.0%
Sep-21	11,462	211	559	770	6.7%

Source: National Records of Scotland, September 2021

Further investigations will be taken forward as an action regarding empty homes as part of the local housing strategy as well as increasing information on the private rented sector. It is important to support private owners and landlords to invest in housing repair and maintenance through the scheme of assistance. Other areas for development are improving awareness and ensuring information is available on private sector grants and funding for energy efficiency.

**Dwellings within Shetland Housing Market areas** Table 3.4 demonstrates the number of dwellings across Shetland with the highest number in the Lerwick & Bressay area, followed by South, Central, North, North Isles and West respectively.

Table 3.4 Dwellings within Shetland by Housing Market Area

Housing Market Area	Total Dwellings	%
Central	1831	16.3%
Lerwick & Bressay	3702	32.9%
North	1602	14.3%
North Isles	1396	12.4%
South	1854	16.5%
West	854	7.6%
Total	11239	100%

Source: Council Tax, Shetland Islands Council, March 2018

**Council Tax Bands** The Estimates of Households and Dwellings in Scotland, 2020 includes details on the Council Tax band of dwellings. Table 3.5 details the bands for Shetland and other similar areas. The table shows that Shetland and Orkney have the same breakdown by bandings, with a higher percentage of properties in the A-C banding than the Scottish average.

Table 3.5 Council Tax Band of Dwellings

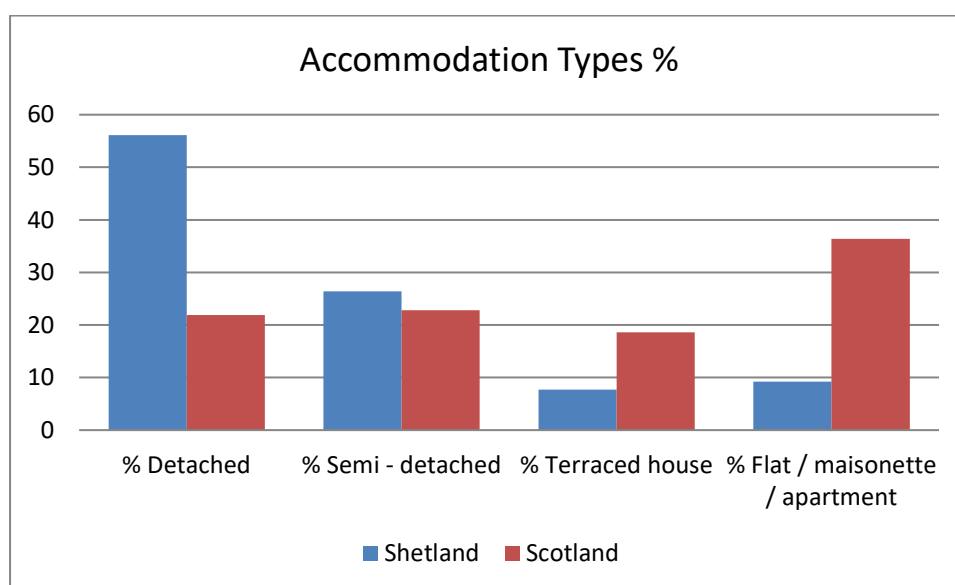
	A-C	D-E	F-H
Shetland	67%	29%	3%
Orkney	67%	29%	3%
Na h-Eileanan Siar	77%	21%	2%
Highland	56%	32%	12%
<b>Scotland</b>	<b>59%</b>	<b>27%</b>	<b>13%</b>

Source: National Record of Scotland, 2020

**Properties by Council Tax Band** Figure 3.1 shows the differences in council tax bands across the Shetland housing market areas at August 2017.

**Accommodation Types** - According to the Census in 2011, there was a much higher proportion of detached properties in Shetland (56.1%) compared to the Scottish average (21.9%) and only 9.2% of properties were flats compared to 36.4% in Scotland overall. Further details is shown in Figure 3.2

Figure 3.2 Accommodation Types %



Source: Census 2011

**Register of Private Landlords** At August 2021, 582 landlords were registered which is much fewer than at January 2017, when there were 844 properties registered by private landlords across Shetland.

### 3.2 - Social Rented Sector

The Social Rented Sector within Shetland is provided by Shetland Islands Council and Hjalmland Housing Association and remains the only means of meeting affordable housing need in Shetland.

**Social Rented Housing by Size** Analysis was carried out on the size of social rented stock. Table 3.6 provides details on the number of properties by size and landlord. Including this type of accommodation leads to the highest size % is 1-bed/bedsit (34%), followed by 3-bed (31%).

Table 3.6 Social Housing Stock by Size and Landlord – All Stock, March 2021

Size	SIC Stock	HHA Stock	Amalgamation SIC & HHA Stock	%
	Mar-21	Mar-21		
<b>Bedsit/1-bed</b>	538	338	877	34%
<b>2-bed</b>	537	251	788	31%
<b>3-bed</b>	621	195	816	32%
<b>4-bed +</b>	38	32	70	3%
<b>Total</b>	<b>1734</b>	<b>817</b>	<b>2551</b>	<b>100%</b>

Source: Housing Service, Shetland Islands Council & Hjalmland Housing Association, March 2021

Table 3.7 Social Housing Stock by Housing Market Area and Size – All Stock , March 2021

HHA & SIC Stock 31 March 2021	Social Housing Stock	Social Housing Stock %
Central	308	12%
Lerwick & Bressay	1359	53%
North	358	14%
North Isles	205	8%
South	214	8%
West	107	4%
<b>Total</b>	<b>2551</b>	<b>100%</b>

Source: Housing Service, Shetland Islands Council & Hjalmland Housing Association, March 2021

Including all social housing in Shetland as at March 2021, there are 2,551 properties made up of SIC stock (68%) HHA stock (32%). The highest proportion of social housing is in the Lerwick & Bressay Housing Market Area with 53%, followed by the North Area with 14%, followed by Central with 12%, North Isles and South with 8% each and West with 4%. There is a high number of 3-bed properties in the North area which is historic because of the high number of properties built in that area at the time of the oil boom. Both SIC and HHA have the highest % of their stock in Lerwick & Bressay but for HHA this is followed by Central (21%) and South (10%) whereas for SIC this is followed by North (18%) and North Isles (10%).

**Social Rented Stock Turnover** Table 3.8 shows the turnover % by housing market area and size using the social housing stock (excluding temporary accommodation) as at March 2018 and all social housing relets for 2017/2018. Using this data, across Shetland, the overall turnover for social rented stock was 12%. By size, the highest turnover was for the 1-bed/bedsit at 16% across Shetland.

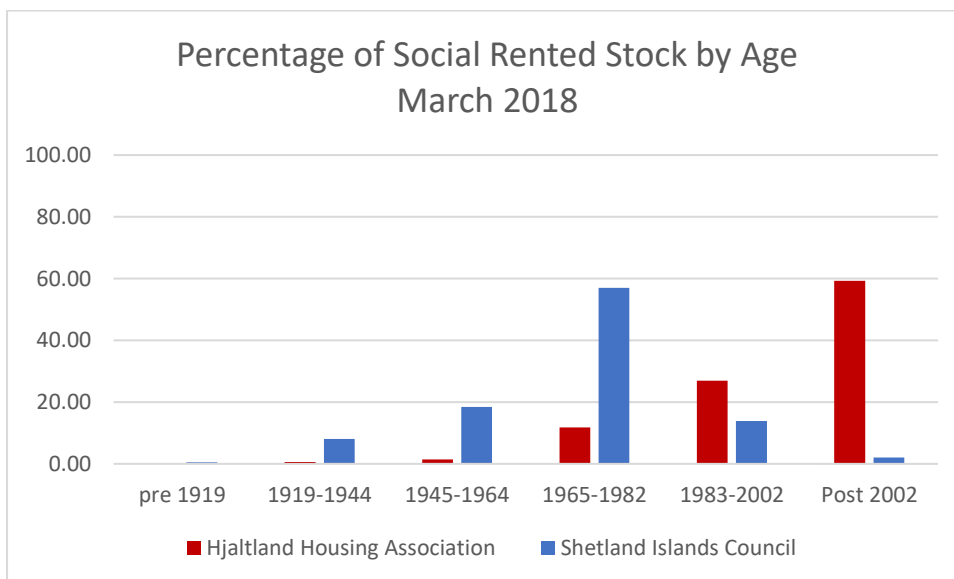
Table 3.8 Social Housing Turnover – Based on March 2018 Stock and 2017/2018 Lets

Turnover	1-Bed	2-Bed	3-Bed	4-Bed	Overall
Central	18%	9%	3%	0%	10%
Lerwick & Bressay	16%	10%	6%	10%	11%
North	10%	14%	11%	13%	11%
North Isles	21%	17%	19%	0%	19%
South	20%	13%	10%	25%	13%
West	3%	12%	5%	0%	6%
<b>Shetland</b>	<b>16%</b>	<b>11%</b>	<b>9%</b>	<b>9%</b>	<b>12%</b>

Source: Housing Service, Shetland Islands Council & Hjalmland Housing Association, 2018

**Age of Social Rented Stock** The Scottish Housing Regulator gathers information on the age of the social rented stock by landlord. Figure 3.3 shows that the majority of the SIC stock was built between 1965-1982 or before whereas the majority of HHA stock was built after 2002.

Figure 3.3 Age of Social Rented Stock



Source: Scottish Housing Regulator, March 2018

**Shared Ownership properties** At March 2021, Hjalmland Housing Association had 43 shared ownership properties. The majority of these are in the Lerwick & Bressay Housing Market Area (81%), followed by Central (13%) and the remainder in the North and North Isles Housing Market Areas.

## Properties built in Shetland

**Properties Built in Shetland** Tables 3.9 to 3.11 show the number of private housing completions (including self build), affordable housing completions, and the combination of them both. Properties built as affordable refer to properties built by Hjaltsland Housing Association (HHA) and Shetland Islands Council (SIC). Overall, between 2016/2017 and 2020/2021, 367 houses were built in Shetland. Of these, 38% of housing were built in Lerwick & Bressay, followed by 27% in Central, 13% in South, 11% in North Mainland, followed by 6% in North Isles and 4% in West.

**Table 3.9 Private Housing Completions**

	2016/2017	2017/18	2018/19	2019/20	2020/21	TOTAL	Avg per year
South Mainland	9	12	9	17	2	49	10
Lerwick & Bressay	15	26	7	3	3	54	11
Central Mainland	10	10	12	14	11	57	11
West Mainland	4	1	3	5	1	14	3
North Mainland	6	13	8	12	1	40	8
North Isles	10	3	5	4	1	23	5
TOTAL	54	65	44	55	19	237	

Source: Planning Service, Shetland Islands Council, 2021

**Table 3.10 Affordable Housing Completions**

	2016/2017	2017/18	2018/19	2019/20	2020/21	TOTAL	Avg per year
South Mainland	0	0	0	0	0	0	0
Lerwick & Bressay	26	32	0	0	27	85	17
Central Mainland	0	3	16	24	0	43	9
West Mainland	0	0	0	0	0	0	0
North Mainland	0	2	0	0	0	2	0
North Isles	0	0	0	0	0	0	0
TOTAL	26	37	16	24	27	130	

Source: Planning Service, Shetland Islands Council, 2021

**Table 3.11 Private and Affordable Housing Completions**

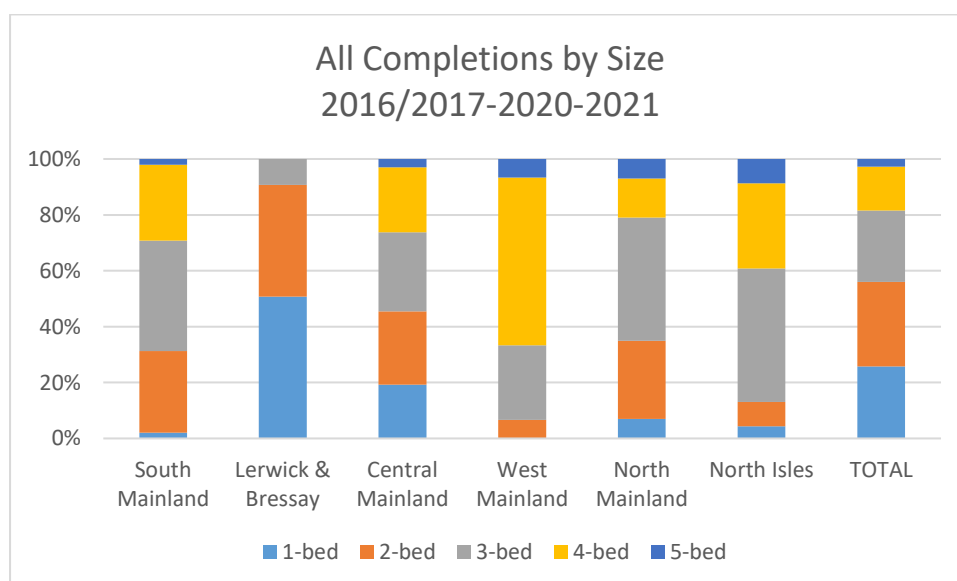
	2016/2017	2017/18	2018/19	2019/20	2020/21	TOTAL	Avg per year
South Mainland	9	12	9	17	2	49	10
Lerwick & Bressay	41	58	7	3	30	139	28
Central Mainland	10	13	28	38	11	100	20
West Mainland	4	1	3	5	1	14	3
North Mainland	6	15	8	12	1	42	8
North Isles	10	3	5	4	1	23	5
<b>TOTAL</b>	<b>80</b>	<b>102</b>	<b>60</b>	<b>79</b>	<b>46</b>	<b>367</b>	

Source: Planning Service, Shetland Islands Council, 2021

**Size of All House Completions** Figure 3.4 shows the % of properties by size built between 2016/2017 and 2020/2021 by housing market area. It shows the spread between the size of properties built across each housing market area as well as Shetland as a whole. For Shetland, the spread was 1-bed (26%), 2-bed (30%), 3-bed (26%), 4-bed (16%) and 5-bed (3%).

Considering private house completions, the highest % by size was 3-bed at 35% followed by 2-bed at 29%. The majority of affordable housing built at this time was 1-bed at 58% and 2-bed at 32%.

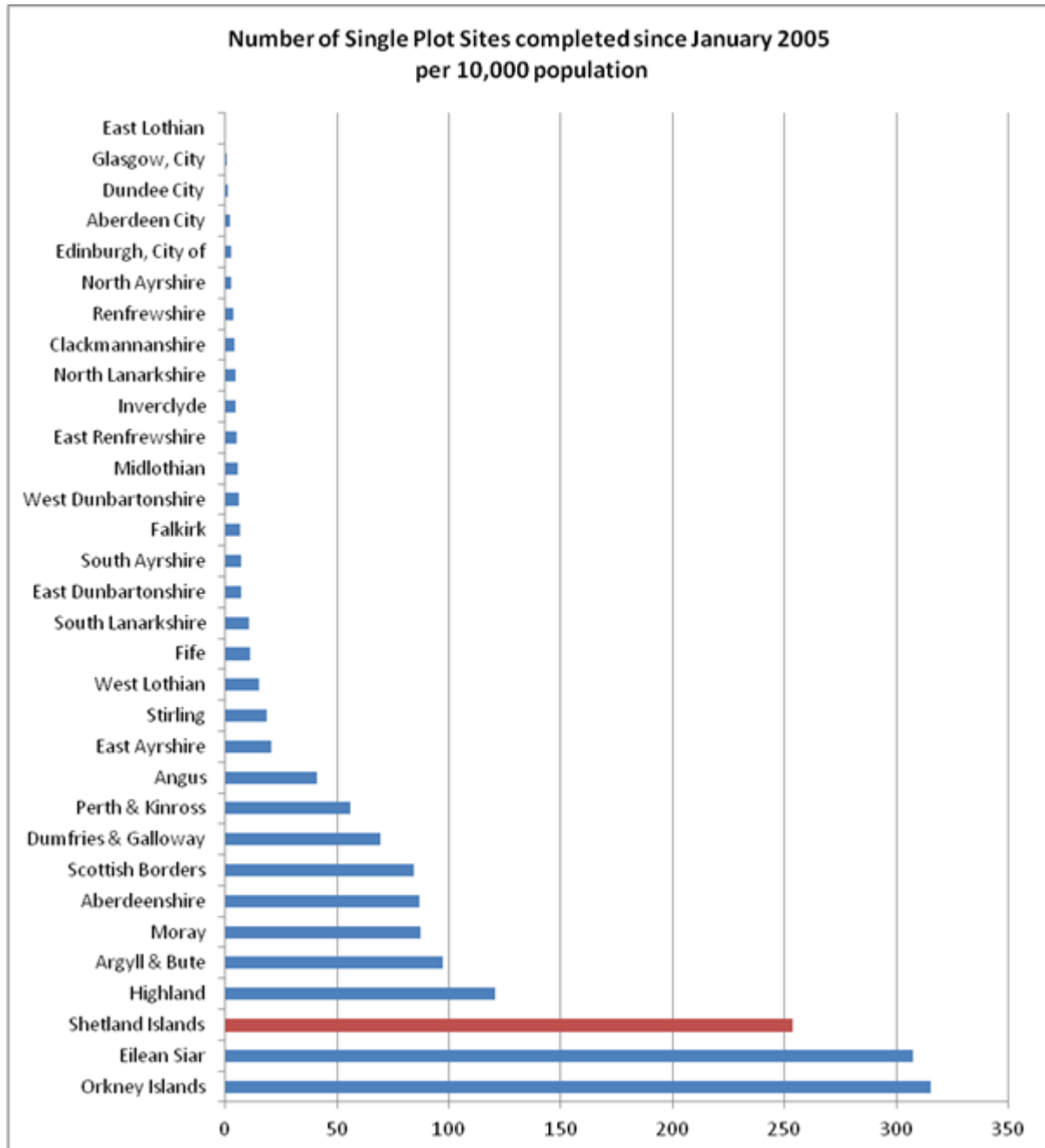
**Figure 3.4 Size of Both Private & Affordable Completions 2016/2017-2020/2021**



Source: Planning Service, Shetland Islands Council, 2021

**Single Plot Sites** Between April 2005 and September 2015, the number of single plot sites completed was 577. Shetland is the 3<sup>rd</sup> highest area within Scotland when considering the number per 10,000 population, as detailed in Figure 3.5, showing that there is not a culture of developments in Shetland, and instead individual properties are built. This is an area which needs to be addressed and taken forward as part of the Local Housing Strategy and Local Development Plan.

Figure 3.5 Single Plot Sites Completed



Source: Housing Statistics for Scotland – Private New Build (NB2), 2015



### 3.3 - Social Housing Demand

**Common Housing Register** There is a Common Housing Register between the Shetland Islands Council and Hjaltland Housing Association. This means that there is a shared housing application form with both landlords awarding housing points according to their own allocation policy.

Table 3.12 details the snapshot number of live housing applications and the total number of applications added to the register in each year from 2014/2015 to 2020/2021. The highest level of demand in these years was in 2014/2015, and after three similar years, the most recent year has increased to 690. This is thought to be affected by the Covid pandemic and fewer properties being available for letting.

The new applications received during the year fluctuates over years, but across the 7 years in Table 3.14, the average number of housing applications received for SIC 596. There are many reasons for fluctuation including social housing developments.

Table 3.12 SIC Housing Demand

Year	On Housing Register at the end of the year	Applicants Added to Register During Year
2020/2021	690	541
2019/2020	580	589
2018/2019	587	621
2017/2018	578	601
2016/2017	661	586
2015/2016	739	562
2014/2015	887	669

Source: Scottish Government, 2021

**Social Housing Stock and Demand** Figures 3.9 to 3.12 show the % of social housing stock across the Housing Market Areas by size as well as the % demand as at March 2021. The demand is represented by the number of housing applications on the SIC Housing waiting list as HHA operate a choice based letting system. The evidence shows:

- 1-beds - much higher demand over stock with the exception of Lerwick & Bressay.
- 2-beds - higher demand over stock with the exception of Lerwick & Bressay.
- 3-beds - significantly lower demand than stock level.
- 4-beds – higher demand over stock with the exception of Lerwick & Bressay.

Council stock tends to be mainly family sized accommodation. This puts pressure on the demand for smaller sized accommodation across all tenures, which is increasing with an aging population and smaller household sizes as well as welfare reform changes.

Further detail on this is available in Annex C.

**SIC Housing Demand** In November 2020, there were 694 live or suspended housing applicants on the SIC housing waiting list. Of those, 72% were on the general waiting list, 11% on the homeless list, 16% on the transfer and 1% considered special cases. Of the 694 applications, 581 had a Shetland address. Table 3.13 details the number of applicants applying to the different housing market areas from a Shetland address, please note any number of housing areas can be chosen.

Table 3.13 SIC Housing Applicants – Areas Applying to

Applicants Applying To	Number of Applicants	%
Central	249	43%
Lerwick & Bressay	442	76%
North	95	16%
North Isles	27	5%
South	111	19%
West	44	8%

Source: Housing Service, Shetland Islands Council, November 2020

**SIC Applicants – Where Applicants are Applying From** At November 2020, of the 581 applicants with a Shetland address, the majority were applying from Lerwick & Bressay (53%), followed by North Mainland (13%) followed by Central and South (both 12%) . This is shown in Table 3.14.

Table 3.14 SIC Applicants Applying From Housing Market Area

Applicants Applying From	Number of Applicants From Shetland	%
Central	71	12%
Lerwick & Bressay	308	53%
North	73	13%
North Isles	36	6%
South	67	12%
West	26	4%
<b>Total</b>	<b>581</b>	<b>100%</b>

Source: Housing Service, Shetland Islands Council, November 2020

**SIC Applicants Applying within Current Housing Market Area** Analysis was also carried out on the % of SIC housing applicants who had chosen the same Housing Market Area as they are applying from. As shown in Table 3.15, the highest % of those including their current Housing Market Area as an area of choice was from those applying from Lerwick & Bressay (95%), followed by Central (85%) with the lowest % in the North Isles (42%). This gives us an indication of areas where applicants wish to and do not wish to remain in social housing.

Table 3.15 % of SIC applicants whose current HMA has been selected as an area of choice

Housing Market Area	%
Central	85%
Lerwick & Bressay	95%
North	62%
North Isles	42%
South	66%
West	54%

Source: Housing Service, Shetland Islands Council, November 2020

**Preferred Area of Choice** The joint SIC and HHA housing application form to gather information on applicants' preferred single area of choice. By allowing applicants to state a preferred area on their application, a more accurate representation of Shetland's housing demand by area is gained although this does not have a bearing on their housing need and likelihood of being rehoused in a particular area. Considering the chosen preferred area for all active applicants at November 2020, 62% of applicants had indicated Lerwick & Bressay as their preferred area, with Central as the second choice at 14%. Table 3.16 provides further detail on this.

Table 3.16 Preferred Area of Choice

Locality	No of Housing Apps with a Preferred Area Chosen	% of Housing Apps with a Preferred Area Chosen
Central	54	14%
Lerwick & Bressay	232	62%
North	29	8%
North Isles	25	7%
South	22	6%
West	11	3%
<b>Total</b>	<b>373</b>	<b>100%</b>

Source: Housing Service, Shetland Islands Council, November 2020

**Low Demand** Between April 2019 and March 2021, 62 properties were considered low demand. 87% of these properties were in the North Isles, with the remainder in the West and North housing market areas.

### 3.4 - Stock Pressure in the Social Rented Sector

This section summarises stock pressures in relation to the social rented sector, based on analysis of the Common Housing Register (waiting list) and annual turnover (lets) in the existing stock.

**Quotas** Both social housing landlords use a quota system to allocate to. The SIC Quota is split between the Lerwick and Landward areas whilst HHA does not have a split across Shetland, as detailed in Table 3.18. The quota levels are reviewed annually.

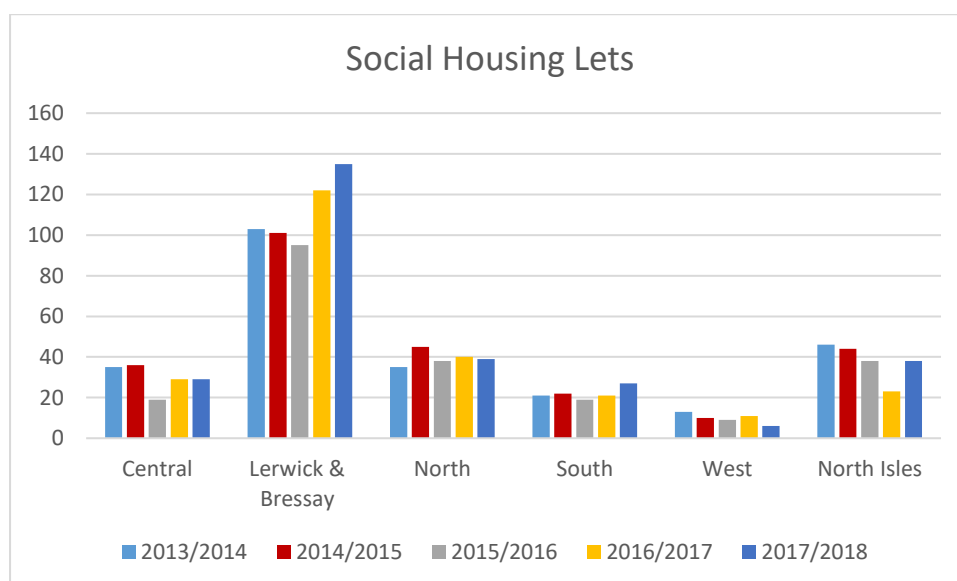
Table 3.17 Social Landlord Letting Quotas, 2020/2021

Landlord	Applicant Type	Lerwick Target	Landward Target
SIC	Homeless	70%	20%
SIC	Waiting List	15%	60%
SIC	Transfer	15%	20%
Landlord	Applicant Type	All Areas Target	
HHA	Waiting List	70%	
HHA	Transfer	30%	

Source: Housing Service, Shetland Islands Council, April 2021

**Social Housing Re-Let Trends** Figure 3.10 provides information on the number of SIC and HHA lets by housing market area between 2013/2014 to 2017/2018. This shows the consistently high number of lets in Lerwick & Bressay compared to other areas.

Figure 3.6 Social Housing Lets by Housing Market Area



Source: Housing Service, Shetland Islands Council and Hjaltland Housing Association, 2018

**Housing Application Points for Allocation** As an indication of housing need, analysis was carried out on the number of points housing applicants had when they were housed during 2019/2020 which is demonstrated in Figure 3.11. Housing points are awarded due to the level of housing need. This was based on housing applications who were eligible for points, therefore homeless applicants and special case applicants were removed. This data includes general and supported lets. This left 109 lets across Shetland where housing points were applicable. Of the 3 points brackets, the percentage of lets overall by bracket was 37% 0-99 points, 39% 100-199 points and 24% as over 200 points.

Within the Lerwick & Bressay locality, there were 26 lets included in the analysis and 16 applicants (62%) had over 200 points which suggests the high level of need required before being rehoused.

Half of all lets in Central were awarded over 200 points and the South area was split evenly across the points bandings. The majority of lets made in the North Isles had below 100 points and West was split evenly in the lower categories with a small percentage of lets made to applicants with over 200 points. This data is to be used with caution, as there are some housing market areas where there were few eligible lets but it demonstrates the high levels of housing need prevalent in the pressured areas.

**Fuel Affordability Survey Data on Under Occupation** Other useful local evidence on underoccupation is available through the Fuel Affordability survey findings. A local survey was carried out in November 2015 and is particularly useful as this provides information regarding number of occupants and number of bedrooms in a property. Of the 927 single households who responded, 83% had 2 bedrooms or more, 53% have 3 bedrooms or more and 12% have 4 bedrooms or more. Of the 837 two adult households, 76% have 3 bedrooms or more and 25% have 4 bedrooms or more. This provides useful evidence showing there is a high level of under occupation throughout Shetland which will then have an impact on people not heating the rooms that they do not occupy leading to rapid deterioration of the fabric of the buildings.

### 3.5 - Stock Condition

Information on the condition of the dwelling stock is available at local authority and national level from the Scottish Housing Condition Survey (SHCS, now combined with the Scottish Household Survey) and this provides a useful baseline. However, it should be noted that the sample of properties survey for Shetland is statistically low and that the smaller the sample size, the greater the likelihood the estimate could be misleading, so care must be taken when using survey sample for analysis.

#### **2017-2019 Scottish House condition Survey:**

- **Below Tolerable Standard** Around 2% of all dwellings in Shetland Islands are below tolerable standard. Scottish average is also 2%.
- **Dwelling Age** - Around 25% of all dwellings in Shetland Islands were built before 1945. Comparing to other similar authorities, this is lower than Orkney (33%), the same as but slightly higher than Eileanan Siar and Highland (both 23%). The overall Scotland figure was 30%.

**Dampness and Condensation** The % of properties with dampness in Shetland was 4%, slightly higher than the Scottish average of 3% and the % of properties with condensation was 7%, slightly lower than the Scottish average of 8%.

**Overcrowding** 2% of households in Shetland are Overcrowded Households (Below Bedroom Standard which is the same as the proportion of Scotland.

**Underoccupancy** 43% of all dwellings in Shetland exceeds the minimum bedroom standard requirement by 2 or more bedrooms. Across Scotland, Shetland is sixth highest. The proportion of all dwellings in Scotland that exceed the minimum Bedroom Standard requirement by 2 or more bedrooms, at 32%.

**Social Housing Quality Standard (SHQS)** According to the Scottish Housing Regulator data, 100% of HHA stock and 76% of SIC stock met the Scottish Housing Quality Standard at March 2021. Work is continuing to ensure that properties are taken up to the standard required to meet the Energy Efficiency Standard for Social Housing (ESSH) requirements.

**Fuel Affordability** – A survey was sent out to all households in Shetland in a November 2015 to provide evidence on the number of households in Shetland who were considered to be in fuel poverty. Households who spend at least 10% of their household income on heating their homes are

considered to be in fuel poverty. The analysis is based on the 2425 responses received. The level of fuel poverty in Shetland was recorded at 53%. Of the single households who considered themselves to be fuel poor, 62% of these owned their own home and within these households, 61% had a member who was at least 65 years old. The survey results of the respondents who considered themselves in fuel poverty by locality are shown in Table 3.20.

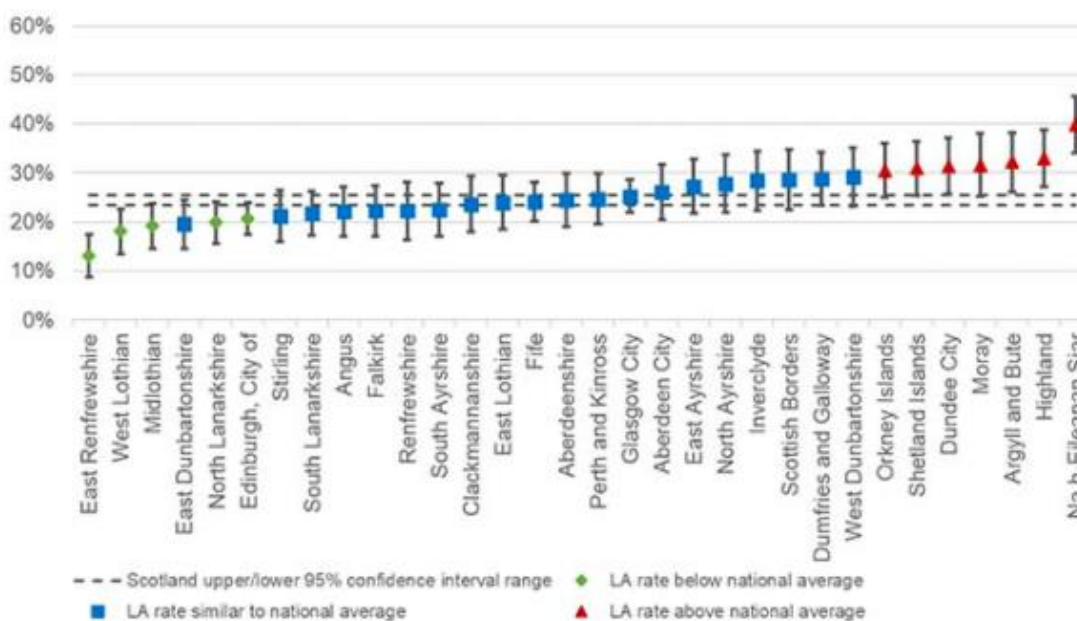
Table 3.18 Fuel Poverty by Housing Market Area

Housing Market Area	%
North Isles	65%
North	58%
Lerwick & Bressay	51%
West	50%
South	49%
Central	47%

Source: Environmental Services, Shetland Islands Council, 2016

**Fuel Poverty** The Scottish House Condition Survey 2017-2019 provides detail on fuel poverty across Scotland and using the revised definition. According to the Scottish House Condition Survey 2017-2019, the fuel poverty rate in Shetland was 31%. Figure 3.12 demonstrates the percentage of dwellings in fuel poverty by local authorities across Scotland with the Scottish average. Shetland is joint 5<sup>th</sup> highest in Scotland with Orkney and Dundee City.

Figure 3.7 Percentage of Dwellings in Fuel Poverty by Local Authority compared to the Scottish Average



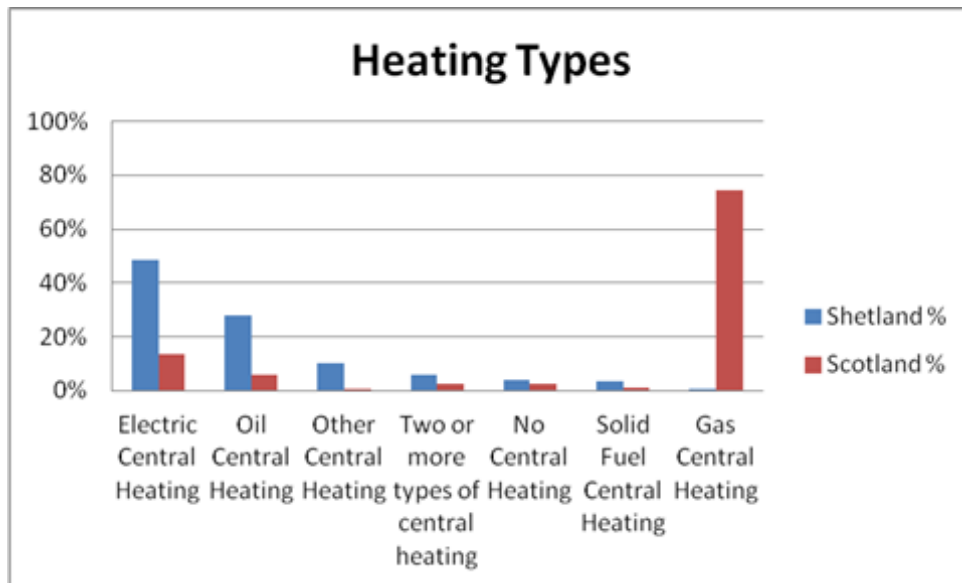
Source: Scottish Housing Condition Survey, 2021

**Extreme Fuel Poverty** The Scottish House Condition Survey 2017-2019 also details that 22% of Shetland households in extreme fuel poverty compared to an average of 12% across Scotland. The

local authorities which had significantly higher extreme fuel poverty rates included Na h-Eileanan Siar (24%), Orkney (22%), Shetland (22%) and Highland (22%).

**Heating Types (All Stock)** According to the Census in 2011, the majority of Shetland properties were heated by electric central heating (48.3%), followed by oil central heating (27.9%). Comparing this with Scotland shows that the majority of Scottish stock is heated by gas with only 13.4% heated by electricity. Figure 3.13 provides further detail .

Figure 3.8 Heating Types – % Shetland Stock compared to % Scotland Stock



Source: Census 2011

**Central Heating** - According to the Scottish House Condition Survey 2016-2018, 76% of all dwellings in Shetland have full central heating, which is less than the proportion in Scotland of 96%.

Stock is generally in good condition, although it is noted that climate conditions require higher standard quality in build materials.

### 3.6 - Homelessness

Figure 3.14 shows the recent trend in homeless applications between 2016/2017 and 2020/2021. It demonstrates the reduction in the number of homeless presentations. There has been a significant effort made to reduce and prevent homelessness using a housing options approach through the RRTP Action Plan. This includes flipping tenancies in order to speed up access to a permanent allocation and reducing the length of time in temporary accommodation.



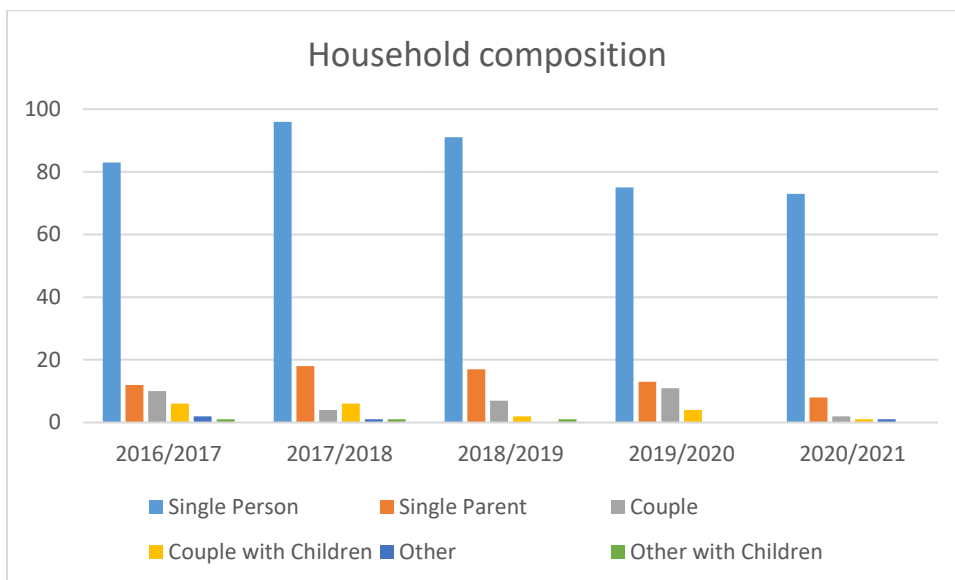
Figure 3.9 – Homeless Applications



Source: Homelessness Annual Report, Scottish Government, March 2021

**Homeless Applications by Composition / Household Type** The profile of homeless applicants in Shetland remains largely unchanged, with homeless applicants predominantly being single people, as demonstrated in Table 3.15.

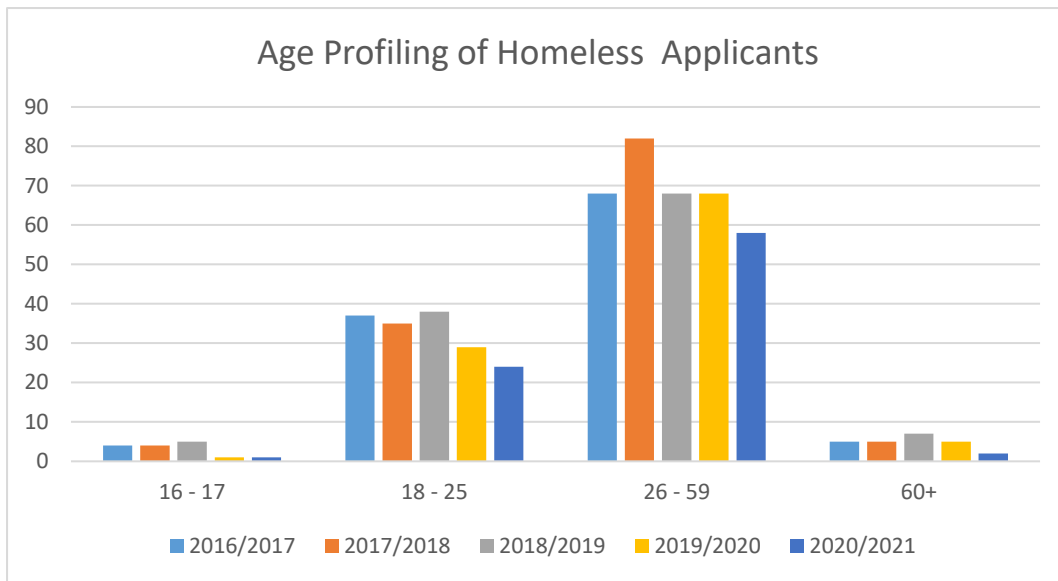
Figure 3.10 Homeless Applications by Household Composition



Source: Homelessness Annual Report, Scottish Government, March 2021

**Homeless Applications by Age Band** The majority of homeless applicants are between the age of 26-59, followed by 18-25 year olds. Figure 3.16 details the age breakdown for applicants registered between 2016/2017 and 2020/2021.

Figure 3.11 Homeless Applications by Age Band



Source: Homelessness Annual Report, Scottish Government, March 2021

## Chapter 4

Local Housing Strategy & Development Plan	Housing Requirement – Estimating Housing Need and Demand - Key Issues Table
<p>Future Need for additional housing broken down by household who are likely to be able to afford :</p> <ul style="list-style-type: none"> <li>• Owner-occupation</li> <li>• Private rent</li> <li>• Below market rent</li> <li>• Social rent</li> </ul>	<p>From the analysis carried out using the HNDA tool, it is estimated that the total requirements would range between 594 to 728 for 2021-2025, and between 658 to 970 for 2021-2040.</p> <p>Broken down by tenure, the estimates of households who are likely to be able to afford the different tenures are as follows -</p> <p>Owner Occupation - 62 to 150 for 2021-2025 and 82 to 257 for 2021-2040.</p> <p>Private Rent – 54 to 118 for 2021-2025 and 82 to 201 for 2021-2040.</p> <p>Below Market Rent – 35 to 44 for 2021-2025 and 56 to 68 for 2021-2040.</p> <p>Social Rent – 425 to 438 for 2021-2025 and 449 to 462 for 2021-2040.</p>

### 4.1 - Estimating Housing Need

This chapter explains how the council and its partners through the Housing Market Partnership have estimated the additional new build housing units that are likely to be required in the future to meet local need and demand. The estimates are based on the ability to afford housing by the following tenures –

- Market housing (owner occupation)
- Market rents (the PRS)
- Below market rent or mid-market rents
- Social housing rents

The datasets included in the tool include household projections, existing need, years to clear existing need, income, growth and distribution, prices and affordability, split need into tenure. The tool is pre-populated but can be adapted to reflect the local context.

The Scottish Government’s HNDA Tool is prepopulated with data to estimate the number of new homes needed in the area. The HNDA tool works by projecting the number of new households who will require housing across Shetland by considering existing households who need new homes PLUS new households who will need homes in the next 20 years. The tool can be adjusted by using local evidence of housing need and housing pressures.

Underpinning the primary inputs to the tool, which form the basis of the HNDA calculation, is an affordability assessment which splits overall housing estimates into the requirement for different housing tenures.

This calculation works by applying the following assumptions to input data on household incomes and housing costs (including house prices and rental values).

Scenarios on housing affordability can then be developed by varying economic, market and affordability assumptions, which affect the tenure split of housing estimates, but which do not have an impact on the overall totals. These assumptions include testing scenarios on income growth, income distribution, house prices and market rent inflation.



The model also assumes how long it will take to address the backlog of households in existing homes which are not suitable for the needs of the household. Whilst this can be varied, it is typically assumed that existing housing need will be met over a five-year period (which is the default assumptions within the HNDA tool) and the assumption made in Shetland.

The HNDA tool, enables partners to test a range of scenarios to derive housing estimates with the HNDA Guidance. Different baseline scenarios were considered against the default calculation in the pre-populated Scottish Government tool. Annex A details all 8 scenarios that were considered and the table below shows the 4 preferred scenarios in further detail.

### HNDA Backlog: Estimate of Households in Existing Need

The local estimate of existing housing need was developed by partners, informed by housing system evidence of households currently in unsuitable housing and who need to move to a new home. Existing need is driven by several factors such as homelessness, insecurity of tenure, overcrowding, concealed households, poor quality housing or lack of basic amenities and unmet need for specialist housing.

In some cases, existing need can be met using in-situ solutions as Core Output 4 of the HNDA e.g. through aids, adaptations or repairs to existing properties. However, a proportion of need must be met through additional housing where an in-situ solution cannot be found e.g. for homeless households in temporary accommodation.

The basis of the local estimate of existing housing need is as follows:

Table 4.1 HNDA Backlog Need Calculation

Homeless Households & Those in Temporary Accommodation (June 2020)	75
Concealed & Overcrowded Households & Specialist Housing (Waiting List Points Awarded for Sharing Amenities, Overcrowding, Insecurity of Tenure)	316
<b>Backlog Need</b>	<b>391</b>

Source –SIC Housing, June 2020

Each element of existing housing need with source evidence is evidenced in detail in Annex A: Core Tool Output Databook, with the basis of each measure detailed below

- Homeless households in temporary accommodation established detailing the number of households in temporary accommodation at the end of June 2020.
- The local authority housing register was used to identify any household which could be considered as concealed & overcrowded households. Any housing application who had been awarded points for sharing amenities with a household who would not be rehoused with them, overcrowding points or any applicant who was considered as having insecurity of tenure. Through the calculation, all duplication was removed to ensure each application was only counted once.

Combining these requirements results in a local existing need estimate of 391 was established as detailed in Table 4.4 below.

Table 4.2 Local Estimate of Existing Housing Need across the Shetland HMA Areas

Housing Market Area	%	No
Central	13%	50
Lerwick & Bressay	67%	262
North	6%	22
North Isles	7%	26
South	7%	28
West	1%	3
<b>Total</b>	<b>100%</b>	<b>391</b>

Source – SIC Housing Service, June 2020

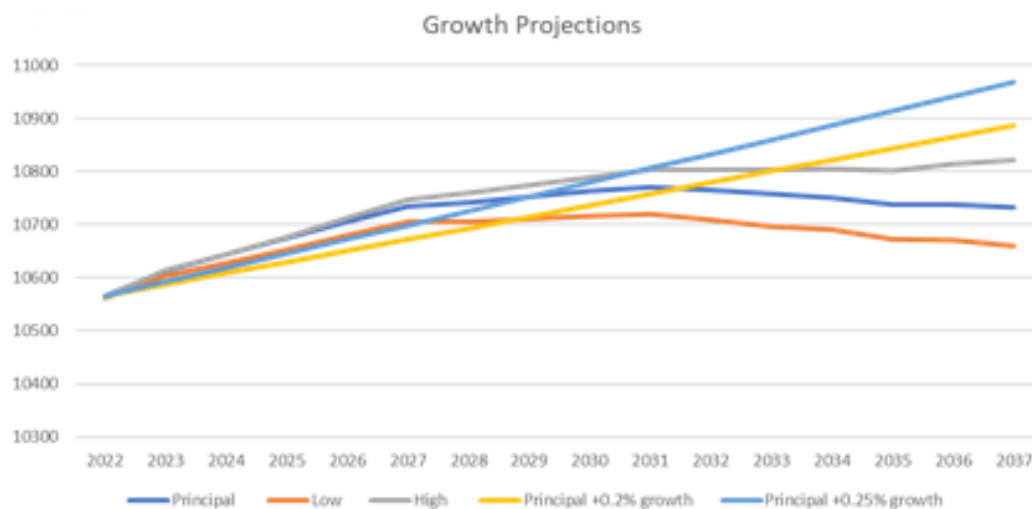
## 4.2 - New Need: Household Projection Scenarios

The HNDA Calculation tool uses household projections produced by the National Records of Scotland (NRS) to provide broad estimates of the future number of new households who will require housing in the area.

A number of scenarios were run including principal, low migration, high migration and principal with a 0.2% growth and principal with a 0.25% growth. While considering these options, principal, low and high migration showed very little difference and based on the evidence regarding the housing policy drivers and our future ambitions, we have decided the most appropriate scenario is for 0.25% growth. This is considered a small, prudent uplift of the principal projections, but in line what we want to achieve, in line with Shetland’s future ambitions. This is demonstrated in the graph below.

Figure 4.1 Population Projections

### Household projections: 2022 to 2037 plus 15 year total



	2,022	2,037	%
Principal	10,566	10,732	101.6%
Low	10,562	10,660	100.9%
High	10,563	10,821	102.4%
Principal +0.2% growth	10,566	10,887	103.0%
Principal +0.25% growth	10,566	10,887	103.8%

The principal plus 0.25% growth household projection estimates an overall growth in households across Shetland of 5%. These projections create an average annual increase of 27 households across Shetland.

For the purposes of the HNDA calculation, it was agreed that the backlog of households in existing housing need will be addressed over a 5 year period and in the first 5 years of the 20 year projections. Given the scale of the backlog, we felt that the 5 year period was an appropriate timescale to meet current need. Anything above 5 years would mean households would spend extended period of time in unsuitable accommodation and it would be considered ambitious to tackle current need during this period.

#### Housing Estimates by Housing Tenure

The HNDA calculation tool applies the housing affordability assumptions outlined above to create housing estimates by tenure. The Shetland HNDA affordability calculation is driven by the following income and economic assumptions, namely:

- Moderately below real term growth in incomes of 1.5% per annum is projected
- Income profile from the CACI dataset with greater inequality being projected through the distribution of income.
- Moderately below real term growth in house prices at 1.6% per annum
- House price to income ratios will bench lower quartile house prices to lower quartile incomes as a benchmark for market housing affordability
- A loan to value mortgage multiplier of 3.9 times income is applied

- Moderately below real term growth for rental at 1.6% per annum.

The various assumptions which underpin the four preferred scenarios are set out as follows:

Table 4.3 Further Detail on Scenarios Chosen

<b>Household Projections</b>	<b>Default</b>	<b>S1</b>	<b>S2A</b>	<b>S7</b>
Household Projections	2018 Principal	2018 Principal	2018 High	2018 Principal
Growth +	0%	0%	0%	+0.25% 15 years
<b>Existing Need</b>	<b>Default</b>	<b>S1</b>	<b>s2</b>	<b>S3</b>
Existing Need	Default	LA HOTO C	LA HOTO C	LA HOTO C
Years to clear backlog	5.00	5.00	5.00	5.00
<b>Income, Growth &amp; Distribution</b>	<b>Default</b>	<b>S1</b>	<b>s2</b>	<b>S3</b>
Income Data	SG Income Data	SG Income Data	SG Income Data	Own Caci data
Growth in median income scenario	Moderate Real term (Default)	Moderate Real term (Default)	Moderate Real term (Default)	Moderately Below Real Terms Growth
Change in income distribution	No Change (Core Default)	No Change (Core Default)	No Change (Core Default)	Greater Inequality
<b>Prices and Afforability</b>	<b>Default</b>	<b>S1</b>	<b>s2</b>	<b>S3</b>
Trend Growth	Trend Growth (Core default)	Trend Growth (Core default)	Trend Growth (Core default)	Moderately Below Real Terms Growth
Percentile	25%	25%	25%	25%
Income Ratio	3.90	3.90	3.90	3.90
<b>Split Need into tenure</b>	<b>Default</b>	<b>S1</b>	<b>s2</b>	<b>S3</b>
Rent Growth Assumption	Trend Growth (Core default)	Trend Growth (Core default)	Trend Growth (Core default)	Moderately Below Real Terms Growth
Proportion of market who buy	60%	60%	60%	60%
Upper income-to-rent threshold	25%	25%	25%	25%
Lower income-to-rent treshohld	35%	35%	35%	35%

Source: HNDA Tool, 2021

- The Default is all pre-populated information included in the HNDA Tool.
- Scenario 1 includes all pre-populated information included in the HNDA Tool, with the Existing Need altered due to local evidence available. The household projections chosen for this scenario is 2018 Principal Migration as this is the base for establishing the demographics for the households in Shetland. The income, growth and distribution choices were based on the economic evidence and historic trends. The prices and affordability choices were based on evidence of house prices and the limited availability of the private sector.
- Scenario 2A includes all pre-populated information included in the HNDA Tool, with Existing Need altered and using 2018 High Migration figure instead of 2018 Principal. The household projections chosen for this scenario is 2018 High Migration which is based on the projected increase in economic activity and the need for workforce beyond what is available in the islands. . The income, growth and distribution choices were based on the economic evidence and historic trends. The prices and affordability choices were based on evidence of house prices and the limited availability of the private sector.
- Scenario 7 includes a growth % of 0.25% which is linked to the Island Growth Deal proposals for the different economic opportunities in the pipeline for Shetland. CACI Paycheck information was chosen as this information is available at postcode level and is available in a more recent timescale which reflects the Greater Inequality option for income distribution. Changes were also made to Trend Growth and Rent Growth Assumption to be Moderately

Below Real Terms Growth. The household projections chosen for this scenario is 2018 Principal Migration. The reason this scenario was chosen was due to the Islands Growth deal. It is considered realistic and prudent as projected household growth is relatively modest but feel confident that we can move beyond this and be more ambitious because the economic impact will encourage migration to Shetland because of new employment opportunities. This reflects the pattern of the economic activity cycle which is not generated from council or public policy, which has direct impacts on the housing market through cycles of high demand.

### Shetland HNDA Calculation Baseline Assumptions

The assumptions tested and selected have been informed by evidence of housing market drivers, stock profiles, pressures and specialist housing requirements.

The HNDA Tool outcomes from each scenario provides estimates for between 2021-2040. The Shetland HNDA calculation combines each component of housing need to create a 20-year range of housing estimates. The outcomes (excluding the HNDA Tool Default) suggests a range of between 658 to 970 housing estimates required between 2021 to 2040, as detailed in Tables 4.4 and 4.5.

### HNDA Requirements

Table 4.4 Cumulative Requirements by Tenure by 5 Year Banding (2021-2040)

Shetland	Default	S1	S2A	S7
2021-2025	292	594	605	728
2026-2030	356	658	693	929
2031-2035	356	658	712	970
2036-2040	356	658	725	970

Table 4.5 Total Requirements by 5 Year Banding (2021-2040)

Shetland	Default	S1	S2A	S7
2021-2025	292	594	602	728
2026-2030	64	64	91	201
2031-2035	0	0	19	41
2036-2040	0	0	13	0
<b>Cumulative</b>	<b>356</b>	<b>658</b>	<b>725</b>	<b>970</b>

Considering these scenarios between 2022-2040, the outcomes suggest there is an average annual requirement (excluding the Default) of 132 per year to 194.

Table 4.6 Average Annual Requirements (2021-2040)

Shetland	Default	S1	S2A	S7
2021-2025	58	119	120	146
2026-2030	13	13	18	40



2031-2035	0	0	4	8
2036-2040	0	0	0	0
<b>Cumulative</b>	<b>71</b>	<b>132</b>	<b>145</b>	<b>194</b>

Source: HNDA Tool, 2022

The Housing estimates by housing market area and tenure considering the different scenarios are detailed in Tables 4.7, 4.8 and 4.9. Most housing market areas show a high proportion of need to be met by social housing relative to other tenures, which is relatively consistent across each area.

Table 4.7 Housing estimates by Housing Market Area and Tenure 2021-2040 (Scenario 1)

	Total requirements by tenure (2021-2040)					%requirements by tenure ( 2021-2040)				
	Social Rent	BM Rent	PRS	Buyers	Total	Social Rent	BM Rent	PRS	Buyers	Per annum
S1										
Shetland	449	56	71	82	658	68%	8%	11%	12%	100%
Central Mainland	56	7	13	14	89	62%	8%	15%	15%	100%
Lerwick & Bressay	287	20	24	19	349	82%	6%	7%	5%	100%
North Isles	31	7	1	14	53	59%	12%	2%	26%	100%
North Mainland	37	8	7	11	63	58%	13%	12%	17%	100%
South Mainland	35	9	15	19	78	45%	11%	19%	25%	100%
West Mainland	8	5	7	6	26	32%	18%	27%	22%	100%

Table 4.8 Housing estimates by Housing Market Area and Tenure 2021-2040 (Scenario 2A)

	Total requirements by tenure (2021-2040)					%requirements by tenure ( 2021-2040)				
	Social Rent	BM Rent	PRS	Buyers	Total	Social Rent	BM Rent	PRS	Buyers	Per annum
S2A										
Shetland	462	68	91	105	726	64%	9%	13%	14%	100%
Central Mainland	57	8	16	17	98	58%	8%	16%	17%	100%
Lerwick & Bressay	293	23	32	25	373	79%	6%	9%	7%	100%
North Isles	32	7	1	17	57	56%	12%	2%	30%	100%
North Mainland	39	11	10	14	74	53%	15%	14%	19%	100%
South Mainland	36	10	17	23	86	42%	12%	20%	27%	100%
West Mainland	9	6	8	7	30	30%	20%	27%	23%	100%

Table 4.9 Housing estimates by Housing Market Area and Tenure 2021-2040 (Scenario 7)

	Total requirements by tenure (2021-2040)					%requirements by tenure ( 2021-2040)				
	Social Rent	BM Rent	PRS	Buyers	Total	Social Rent	BM Rent	PRS	Buyers	Per annum
S7										
Shetland	449	64	201	257	970	46%	7%	21%	26%	100%
Central Mainland	58	6	33	37	134	44%	4%	24%	28%	100%
Lerwick & Bressay	282	26	70	74	452	62%	6%	16%	16%	100%
North Isles	30	12	10	35	87	35%	13%	11%	40%	100%
North Mainland	34	10	25	37	106	32%	9%	24%	35%	100%
South Mainland	38	4	38	54	134	29%	3%	28%	40%	100%
West Mainland	8	5	20	21	53	15%	10%	37%	39%	100%

Source: HNDA Tool, 2022

### 4.3 - Estimating Housing Need & Demand: Key Issues

Future need for additional housing broken down by household who are likely to be able to afford:

- owner-occupation
- private rent
- below market rent
- social rent

Across Shetland, the Local Housing Strategies and Local Development Plans of Shetland partners should set achievable and deliverable Housing Supply Targets based on the housing estimates produced by the HNDA calculation, considering deliverability within the area context, as well as local strategic landscape.

Table 4.10 Average Annual Requirements by Tenure (2021-2030)

	Social Rent	Social Rent	Social Rent	Social Rent	BM Rent	BM Rent	BM Rent	BM Rent	PRS	PRS	PRS	PRS	Buyers	Buyers	Buyers	Buyers
	Default	S1	S2A	S7	Default	S1	S2A	S7	Default	S1	S2A	S7	Default	S1	S2A	S7
Shetland	30	90	92	89	11	11	13	12	14	14	16	37	16	16	19	48
Central	3	11	11	12	1	1	1	1	3	3	3	6	3	3	3	7
Lerwick & Bressay	11	57	58	56	4	4	4	5	5	5	6	13	4	4	4	14
North Isles	4	6	7	6	1	1	1	2	0	0	0	2	3	3	3	7
North	4	7	0	7	2	2	1	2	1	1	1	5	2	2	1	7
South	5	7	7	8	2	2	2	1	3	3	3	7	4	4	4	10
West	3	2	1	2	1	1	1	1	1	1	1	4	1	1	1	4

Source: HNDA Tool, 2022

Table 4.11 Average Annual Requirements by Different Scenario (2021-2030)

	Default	S1	S2A	S7
Shetland	71	132	140	186
Central	10	18	18	26
Lerwick & Bressay	23	70	72	88
North Isles	8	11	11	17
North	9	13	3	20
South	14	16	16	26
West	7	5	4	10

Source: HNDA Tool, 2022

The Local Housing Strategy and Local Development Plan should consider the need for housing supply targets that extend beyond the duration of the 5-year LHS period by reviewing historic new build completion rates, considering the wider policy and economic context at a regional and local level.

Strategic drivers to inform longer term and short term housing and development planning policy decisions, using HNDA housing estimates as a starting point, are set out in more detail in Chapter 2, based on the views and perspectives of Shetland partners and stakeholders

Further information on the scenarios chosen can be provided on request.

## Chapter 5 – Specialist Provision

### 5.1 - Introduction

This chapter sets out information on the need and demand for a range of specialist provision. These support independent living for as long as possible and help to enable people to live well and with dignity. Specialist provision refers to 3 broad categories of need covering 6 types of housing or housing-related provision, as shown in the table below.

Category of Housing Need	Type of Housing Provision
Property Needs	1 Accessible and adapted housing 2 Wheelchair housing 3 Non-permanent housing e.g. for students, migrant workers, asylum seekers, refugees
Care and Support Needs	4 Supported provision e.g. care homes; sheltered/very sheltered housing; hostels and refuges 5 Care / support services for independent living
Locational or Land Needs	6 Site provision e.g. sites/pitches for gypsy/travellers and sites for travelling show people.

The Housing Contribution Statement is a statutory requirement and sets out the contribution of housing and related services in Shetland towards helping achieve priority outcomes for health and Social Care. The details of the Statement are included in Annex B.

The Ageing Population is very relevant to the Specialist Provision Section of the HNDA.

There are limits to the existing data required for the Specialist Provision chapter. This has been recognised as a prioritised action within the Local Housing Strategy and will be taken forward through multi agency joint working. Due to our small numbers, projections are extremely difficult to provide and geographic dispersal adds to the complexity of projecting needs.

### 5.2 - Key Issues Identified in the HNDA

Local Housing Strategy	Specialist Provision – Key Issues Identified in the HNDA
Accessible and Adapted Housing	1 – With the projected demographic changes, and an acute ageing population, the number of smaller households is expected to increase. Suitable provision needs to be in place for appropriate housing across all tenures.  2 – With the ageing population, there will be an increased need for housing support to enable people to sustain their tenancies and accommodation and support their independence. Adaptable and flexible housing support

	<p>services need to be available as part of the shared assessments to care approach.</p> <p>3 - There are proven benefits of joint working with health and social care, particularly in relation to prevention and early intervention. There are plans to consider an integrated housing options approach.</p> <p>4 - There is a high percentage of housing stock within Shetland that have been adapted, particularly within owner occupied / private housing.</p> <p>5 - There continues to be a demand for adaptations in both private and social rented housing. Work is continuing across Shetland to ensure housing is suitably adapted as required.</p> <p>6 - There is a need to promote further the benefits of assisted technologies in housing and how it can help to maintain independence and sustain accommodation, especially in light of the projected ageing population.</p>
<p><b>Wheelchair Housing</b></p>	<p>1 - This is difficult to quantify due to the small numbers within information available. There is a recognition that there is a need for development of accessible homes for life models rather than specific wheelchair housing. This ensures that supply can be used flexibly and be better able to meet specific needs locally. This is an area which will be further considered through the local housing strategy.</p>
<p><b>Non-permanent housing</b></p> <p>e.g. for students, migrant workers, homeless people, refugees, asylum seekers</p>	<p>1 - It has been recognised as part of the Local Outcomes Improvement Plan for Shetland 2018 to 2028 that there is a need for more student accommodation.</p> <p>2 - Within the Local Outcomes Improvement Plan 2018 to 2028 there is a priority aimed at halting de-population in Shetland, increasing the working age population and diversifying the economy. Provision of a range of affordable housing solutions will be key to enabling this aim to be achieved.</p> <p>3 - The non-permanent housing solutions can be limited, depending on the economic situation in Shetland. The unpredictability of the key economic sectors leads to fluctuations of available housing options, particularly in the private rented sector.</p> <p>4 - The number of homeless applications has decreased recently which can be considered due to the preventative</p>

	<p>work that is being done with people at risk of homelessness. But, the length of time in temporary accommodation is particularly high in Shetland and has increased over the last few years. Reasons for this include the imbalance of stock and demand. Over the last 5 years, over 70% of homeless applicants have been single people with the majority requesting Lerwick as the only area where they wish to be rehoused. To overcome this, we need to ensure the future supply is of the right size and in the right location in order to be able to provide permanent housing solutions and reduce the time spent in temporary accommodation. Demand for temporary accommodation fluctuates and there needs to be enough temporary/emergency accommodation to avoid having to resort to B&amp;B accommodation, or unsuitable accommodation in breach of the Homeless Persons (Unsuitable Accommodation) (Scotland) Order 2020 Amendment.</p>
<p><b>Supported Provision</b></p> <p>e.g. care homes, sheltered housing, hostels and refuges</p>	<p>1 - Due to the ageing population, it is anticipated that there will be an increasing demand for care and support in order to allow people to maintain their independence. Joint working with Health &amp; Social Care continues and alternative options to residential care are being considered.</p> <p>2 - Importance of tenure-blind housing support linked to supporting the person rather than the provision of services linked to a property.</p> <p>3 - There is a need to review the provision and terms of sheltered and very sheltered housing and ensure that provision is fit for modern needs.</p>
<p><b>Care/ support services for independent living at home</b></p> <p>e.g. home help, Handy person, Telecare</p>	<p>1 - The Housing Support Service was traditionally linked to sheltered housing. Following a redesign, the service being offered has been expanded and it is now a multi-tenure service. We are projecting demand to increase.</p> <p>2 - The Housing Support Service is provided to anyone with an assessed support need, Shetland wide, across all tenures. The majority of Housing Support customers are over the age of 65. This is an important service which allows people to manage and sustain their tenancies or homes.</p> <p>3 - Limited information is available on the number of people across Shetland who suffer from mental health issues. The mental health service review is in progress which will allow the gathering of valuable information for</p>

	<p>understanding the service user needs and provision in Shetland.</p> <p>4 - With the ageing population and the associated projected support needs, there is a need for assistance using telecare / telehealth services in properties to sustain tenancies. This also highlights the importance of an improved broadband and mobile connectivity services throughout Shetland.</p> <p>5 - There is a requirement for more data to be available on disability, health &amp; wellbeing in Shetland to be able to plan for what is needed.</p> <p>6 - The criteria and mechanisms for the award of medical points to SIC and HHA housing applicants has been reviewed by a multi-agency group. Following this review, a Medical Points Panel carries out the assessment on medical needs in relation to their housing need.</p> <p>7 - There is a requirement to develop better, shared baseline information about the housing and support needs of people with long term, multiple health conditions and complex needs. And specifically to develop outcome focused recording and reporting methods.</p>
<p><b>Development Plan</b></p>	<p><b>Specialist Provision: Key Issues Identified in the HNDA</b></p>
<p><b>Strategic planning for housing for Specialist Provision housing</b></p> <p>e.g. any additional locational/ spatial considerations.</p>	<p>1. The majority of older people in Shetland will not choose to downsize. However, we know that suitable, appealing homes for those wishing to downsize are in limited supply and that new supply in the private market is unlikely to directly address the needs of older people without intervention, rather it will develop mainly to meet the need of family households and first time buyers. Overall there are a limited range of available options within the owner occupied and private rented sectors. Promotion of development in planning terms rests with the local authority.</p> <p>2. Developers of new build schemes should be encouraged to consider development to the criteria in the Lifetimes Homes Standard/proposed Category 2 in the proposed Housing Standards across all tenures given that the retrofitting and subsequent removal of aids and adaptations in existing homes is often not cost effective.</p>

### 5.3 - Template 1 – Accessible and Adapted Housing

<b>1</b>	<b>National Policies</b>
1.1	<p>Equality Act 2010</p> <p>Age, Home and Community: a Strategy for Housing Scotland’s Older People, 2012-2021</p> <p>Integration of health and social care and the Reshaping Care for Older People agendas</p> <p>Scotland’s National Dementia Strategy 2013-2016</p> <p>Healthcare Quality Strategy and the 2020 Vision</p> <p>The Public Bodies (Joint Working) (Scotland) Act 2014</p> <p>Public Bodies (Joint working) National Health and Wellbeing Outcomes (Scotland) Regulations 2014</p>
<b>2</b>	<b>Local Policies / Strategies</b>
2.1	<p>Shetland Islands Health &amp; Social Care Partnership Strategic Commissioning Plan</p> <p>Shetland’s Partnership Plan 2018-2028</p>
<b>3</b>	<b>Property Needs</b>
3.1	<p>There continues to be a demand for adaptations in both private and social rented housing. Work is continuing across Shetland to ensure housing is suitably adapted as required. In Shetland, there are more adapted properties than the national average across owner occupied and social housing.</p> <p>Whilst there is a high percentage of stock in SIC that has been adapted, with the projected ageing population it is anticipated that there will be a continued need for adaptations to be provided.</p> <p>There is a need to promote further the benefits of assisted technologies in housing and how it can help to maintain independence and sustain accommodation.</p>
<b>4</b>	<b>Suitable For:</b> People whose current accommodation does not meet their physical/ health needs and people with limited mobility/dexterity but who are otherwise able to remain in their mainstream housing, with or without care or support
<b>5</b>	<b>Evidence</b>
	<p>According to the Scottish House Condition Survey 2016-2018,</p> <ul style="list-style-type: none"> <li>• 39% of Households where one or more of the members are Long Term Sick or Disabled, lower than the Scottish average of 43%.</li> <li>• 9% of Households where one or more of the members are receiving care services, lower than the Scottish average of 7%.</li> <li>• 5% dwellings containing someone who was long term sick or disabled, restricted by the dwelling, similar to the Scottish average of 6%.</li> <li>• 2% of all households in Shetland report needing adaptations for disabled occupants, which is the same as the Scottish average.</li> <li>• 31% of all households have adaptations for disabled occupants, which is greater than the proportion of all households in Scotland that report having adaptations for disabled</li> </ul>

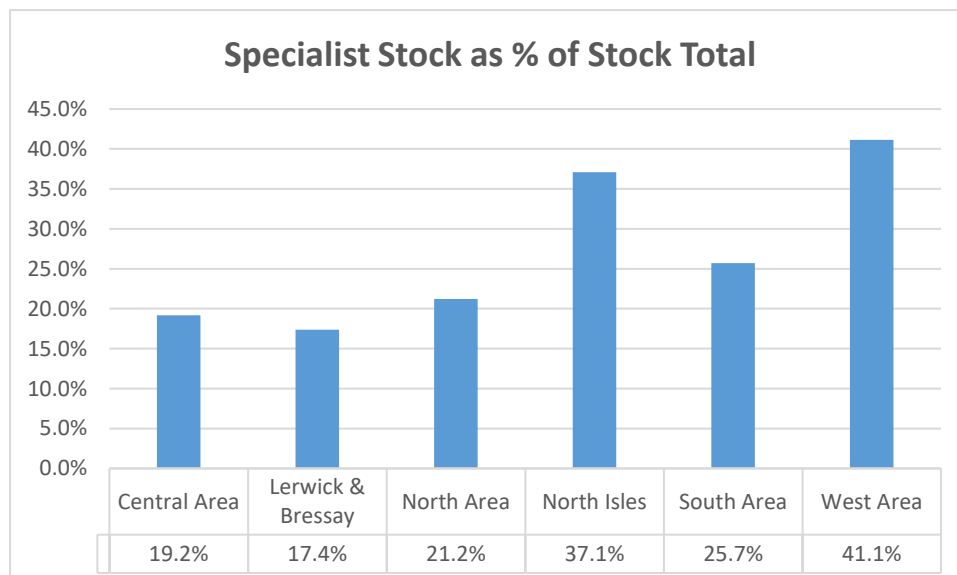


occupants (21%). Shetland has the joint highest percentage of owner occupied properties which have been adapted, at 27% with the Scottish average being 17%. The percentage of social housing with adaptations is 41% in Shetland which is higher than the Scottish average of 32%.

Both SIC and HHA have attribute based reporting in their asset management systems so information on types and levels of adaptations is recorded consistently

**Housing Stock by Provision Type Annual returns are sent to the Scottish Housing Regulator detailing provision types.** The majority of social housing stock is general needs and sheltered. Specialist stock can be identified as Sheltered, Very Sheltered, Specialist, Wheelchair and Ambulant Disabled and such properties re reported to the Scottish Housing Regulator annually by SIC and HHA. At March 2021, 546 social housing stock were considered specialist stock, 34% of all stock. Analysis on the location of the specialist stock was carried out by housing market area, and is demonstrated in Figure 5.1 below. Please note the North Isles and West area have the lowest overall stock figures which affects the percentage overall.

**Figure 5.1 Specialist Stock**



Source: SIC & HHA, March2021

**Adaptations** The One Stop Shop is a service for private sector homeowners to receive assistance with disabled adaptations, repairs and maintenance to their properties. The service is provided by Hjaltland Housing Association on the behalf of the Shetland Islands Council. Advice and information is available to all homeowners, eligible tenants and disabled occupants living in private sector housing.

The adaptations and repairs to private housing which are categorised as Major Adaptations, Minor Adaptations, Scheme of Assistance Adaptations, Specialist Adaptations and Handyperson.

**Major Adaptations** This work requires Occupational Therapist (OT) approval. Between 2011/12-2016/17, the most common type of major adaptation work carried out was for

	<p>external rails with 68 properties adapted in this way. Other works carried out include handrails, access, hoists, stairlifts and bathroom adaptations. The most major adaptations carried out were in Lerwick &amp; Bressay (30), followed by North Isles (20%), Central Mainland (14%), South Mainland (13%), North Mainland (10%) West Mainland (8%) with 3% unknown.</p> <p><b>Minor Adaptations</b> This work can be requested without OT approval, from a specific list of the works. Over the 5 years between 2011/2012 and 2016/2017, there were 1782 minor adaptation jobs carried out. Of these works, 75% of the minor adaptations carried out were for internal and external rails. The other 25% of minor adaptations were made up of installing key safes, temporary ramps, adaptations to bathrooms etc.</p> <p>Due to the way this information has been recorded it has been difficult to determine the number of properties adapted, but within 2016/2017, minor adaptation work was carried out on 181 properties. The area where the highest % of minor adaptations was in Lerwick &amp; Bressay (34%), followed by South Mainland (17%), North Isles (13%), Central (12%), North Mainland (12%) and West (5%).</p> <p><b>Scheme of Assistance Adaptations</b> Through the One Stop Shop, adaptations are carried out to private properties. Between January 2011 and December 2015, 223 scheme of assistance adaptations were carried out. Of the work carried out, 156 (70%) were to install level access showers. Other works include ramped access, WC alterations, extension/conversion and driveway.</p> <p><b>Specialist Adaptations</b> Between January 2011 and December 2015, 64 specialist adaptations were carried out to private properties through the one stop shop. Of these works, 51 (80%) were for stairlifts, with the remaining works being ceiling hoists.</p> <p><b>Handyperson Repairs</b> Orders are taken through the One Stop Shop and are carried out to private properties. The type of work carried out are repairs rather than adaptations. The majority of the Handyperson work carried out related to windows/doors, plumbing/heating, roof repairs and electrical work.</p>
	<p><b>Adaptations to SIC Properties</b> Over the 3 years between April 2018 and March 2021, 356 SIC properties had social adaptations carried out. The installation of handrails covered just under half of the work carried out, followed by bathroom alterations or level access shower installations/ alterations being carried out. Other works included the installation of key safes, and alterations to lights, heaters, paths, kitchens and plumbing. All of these adaptations carried out to the SIC tenants' homes allow the tenants to remain in their homes without the need for them to move.</p>
	<p><b>Medical Need</b> Medical points are awarded to housing applications using a person centred approach with multi-agency input including SIC, HHA and Occupational Therapy, focussing on appropriate housing solutions for social housing applicants. Prevention and early intervention is considered where a property can be adapted rather than the person with the need having to move from their home, where possible. Applicants are awarded different points due to the</p>

assessed level of need as detailed below. The criteria is the same for both SIC and HHA but different points are awarded by each landlord.

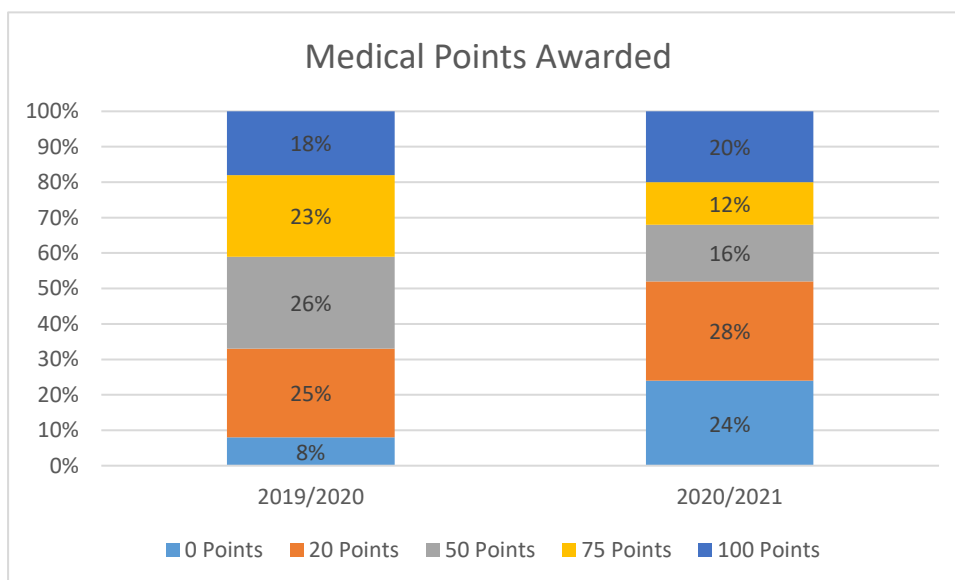
**Table 5.1 Medical Need**

<b>SIC Points Awarded</b>	<b>HHA Points Awarded</b>	<b>Award description</b>
nil points	nil points	Current accommodation has no impact on health. Suitable adaptations can be made to existing property.
20 points	10 points	Current accommodation has a low level impact on health. Suitable adaptations can be made to the existing property
50 points	15 points	Current accommodation has a moderate impact on health. Adaptations not available to fully alleviate situation.
75 points	20 points	Current accommodation has a significant impact on health. Adaptations not available to fully alleviate situation.
100 points	25 points	Current accommodation not a long-term viable housing solution. Adaptations not available to fully alleviate situation.

Source: SIC Housing, 2021

The details of the level of points and the % of applications awarded medical points between 2019/2020 and 2020/2021 are included in Figure 5.2. The evidence suggests that in the most recent year there has been an increase in medical points assessed, with the highest proportion assessed as having a lower level of need, although 20% of applicants having the highest level of need. There was a higher number of applications received during that year which may have affected this.

**Figure 5.2 Medical Points Awarded**



Source: SIC Housing, April 2021

**6 External stakeholder consultation & engagement**

6.1	<p>The Housing Contribution Statement was considered by the Community Health &amp; Care Strategic Partnership Group. This has a statutory list of members that includes patient &amp; carer reps, voluntary sector statutory agencies, including carer providers and those in receipt of care.</p> <p>Latest evidence sources suggest that 2% of all households in Shetland need adaptations for disabled occupants. The future projection for adapted housing is that due to the ageing population, more adaptations will be required and continue to be required. Further work to gather accurate data at a local level will be progressed with the health &amp; care partnership.</p>
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## 5.4 - Template 2 – Wheelchair Accessible Housing

1	<b>National Policies</b>
1.1	<p>The following national policies are of specific relevance for the provision of wheelchair accommodation:</p> <ul style="list-style-type: none"> <li>• Equality Act 2010</li> <li>• Age, Home and Community: a Strategy for Housing Scotland’s Older People, 2012-2021</li> <li>• Integration of health and social care and the Reshaping Care for Older People agendas</li> <li>• Scotland’s National Dementia Strategy 2013-2016</li> <li>• Healthcare Quality Strategy and the 2020 Vision</li> <li>• The Public Bodies (Joint Working) (Scotland) Act 2014</li> <li>• Public Bodies (Joint working) National Health and Wellbeing Outcomes (Scotland) Regulations 2014</li> <li>• Mind the Step: an estimation of housing need among wheelchair users in Scotland, CIH/Horizon Housing, 2012</li> <li>• Lifetime Homes Standards – a voluntary housing design standard setting out minimum criteria for new housing that should be convenient for most occupants, including most wheelchair users and disabled visitors, without the necessity for substantial alterations. Includes features that make the home adaptable for wheelchair use at a later date, as and when the occupants needs might change</li> <li>• Scottish Building Standards – require all buildings to be constructed to allow all users safe, convenient and unassisted access. A proportion of bedrooms in any dwelling should be wheelchair accessible and a means of unassisted access must be available to, and throughout, at least one level of each dwelling. The guidance is based around the “Housing for Varying Needs” (1998).</li> <li>• National Health and Wellbeing Outcomes – Outcome 2 of the national framework is that people, including those with disabilities or long term conditions, or who are frail, are able to live, as far as reasonably practicable, independently and at home or in a homely setting in their community.</li> </ul>
2	<b>Local Policies / strategies</b>
2.1	Shetland Islands Health & Social Care Partnership Strategic Commissioning Plan Shetland’s Partnership Plan 2018-2028
3	<b>Property Needs</b>

3.1	<p>The design need for wheelchair accessible housing is for a home that provides a completely step-free environment, space for a wheelchair to circulate and access all rooms, a kitchen and bathroom that suits the occupant's particular needs and fittings and services that are within reach and easy to use.</p> <p>There is a cross over between wheelchair housing and accessible &amp; adapted housing.</p>
4	<p><b>Suitable For:</b> all wheelchair users, whose impaired mobility is either permanent or temporary. This includes people of all ages, where the disability. People who use a wheelchair for most or all of the time, have this particular feature in common but otherwise their needs will vary considerably. Some people have multiple disabilities and some will have a progressive illness. Also, people with a disability may have incurred this due to an accident, incident or illness.</p> <p>A wheelchair user may live alone, or with a carer or partner or be part of a family unit. In family housing it can be an adult or a child that uses a wheelchair. The design need is for a home that provides a completely step-free environment, space for a wheelchair to circulate and access all rooms, a kitchen and bathroom that suits the occupant's particular needs and fittings and services that are within reach and easy to use.</p>
5	<p><b>Evidence</b></p>
	<p>Based on evidence from the Common Housing Register, it is estimated that approximately 150 households may require specialist forms of housing across Shetland, including wheelchair adapted properties. As at March 2021, on the common housing register, there were 11 applicants who required wheelchair accommodation.</p> <p>Wheelchair housing is an area where further information is required for a better understanding in this area. Work will continue in identifying what suitable housing is available for homes for life, rather than specific to wheelchair housing.</p> <p>All RSL new builds meet the Housing for Varying Need standards and should be flexible enough and suitable to meet wheelchair needs. Dispersed island community and small numbers mean that you do not know where the need may arise and this means that a more reactive approach has to be taken. Needs are addressed on a case by case basis and arbitrary targets, in this instance prove counter productive.</p> <p>Equalities information is to be gathered from all housing applicants and tenants including the disability status. This will assist in identifying any physical impairments, and data regarding wheelchair users.</p> <p>While the majority of need for wheelchair accessible housing can be addressed by the provision of various adaptations and turnover in existing stock, there is likely to be some new, purpose built provision in the future. With any new housing being built to the relevant standard, and the completion of the King Harald Street project will be a source of evidence for the future.</p> <p>Due to small numbers, there is very little data available on this form of housing in Shetland and the Council recognises that additional work is required. Although this is more likely to be "homes for life" type properties rather than just wheelchair specific.</p>

<b>6</b>	<b>External stakeholder consultation &amp; engagement</b>
	<p>External stakeholder consultation &amp; engagement in this area will be carried out at a later date which will identify any gaps and further work required.</p> <p>The projected requirement for wheelchair accessible housing based on the estimated needs and evidence from the current common housing register is for 11 units. With an ageing population this is expected to increase.</p>

### 5.5 - Template 3 – Non-Permanent Housing

<b>1</b>	<b>National Policies</b>
	<p>Housing (Scotland) Act 1987  Housing (Scotland) Act 2001  Homeless Persons Advice and Assistance (Scotland) Regulations 2002  Homelessness etc (Scotland) Act 2003  Ministerial Statement on Abolition of Priority Need  Housing (Scotland) Act 2010  The Homeless Persons (Unsuitable Accommodation) (Scotland) Order 2014  The Homeless Persons (Provision of Non-permanent Accommodation) (Scotland) Regulations 2010  The Children (Scotland) Act 1995  Code of Guidance on Homelessness  Chartered Institute of Housing &amp; Shelter Scotland Guidance on Standards for Temporary Accommodation (2011)</p>
<b>2</b>	<b>Local Policies / Strategies</b>
	<p>Temporary Accommodation Strategy  SIC Allocation Policy  SIC Homeless Policy  SIC Temporary accommodation Policy  SIC Prevention of Homelessness Policy  Housing Need and Demand Assessment  Local Housing Strategy  Strategic Housing Investment Plan</p>
<b>3</b>	<b>Property Needs</b>
	<p>The non-permanent housing section considers the requirement for transitional accommodation, mainly from temporary accommodation to permanent accommodation. There is a high demand is for single person accommodation. Temporary accommodation is mainly provided through the local</p>

	authority housing stock but other options are used when required. The quality of temporary accommodation is measured against the SIC Housing Service Letting Standard and the views of the tenants is sought regularly.																					
5	<b>Land Needs</b>																					
	e.g. university/ college campus sites and city centre sites  Provision is required for various types of accommodation, including accommodation for students and key workers.																					
6	<b>Suitable For:</b> primarily those affected are single persons experiencing homelessness and residing in temporary accommodation. This can affect any age, but in recent years the majority affected have been in the 26-59 age range, mainly male. This template could also include students, economic migrants and asylum seekers or refugees are also included. These latter groups have not had a significant presence within Shetland however there is potential for this situation to change in the future.																					
7	<b>Evidence</b>																					
	<p>The need for more non-permanent housing options is recognised, although current unpredictability in the economic situation will lead to fluctuations in requirement.</p> <p><b>Temporary Accommodation</b></p> <p>The provision of temporary accommodation for homeless households lies with the Shetland Islands Council. At March 2021, the Housing Service had 77 occupied units of temporary accommodation for homeless households which is all local authority stock. Table 5.4 shows that the location is predominantly within Lerwick, due to demand.</p> <p><b>Table 5.2 Location of Temporary Accommodation</b></p> <table border="1"> <thead> <tr> <th>Housing Market</th> <th>Number</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>Lerwick&amp; Bressay</td> <td>72</td> <td>94%</td> </tr> <tr> <td>North</td> <td>2</td> <td>3%</td> </tr> <tr> <td>South</td> <td>1</td> <td>0%</td> </tr> <tr> <td>Central</td> <td>2</td> <td>3%</td> </tr> <tr> <td>North Isles</td> <td>0</td> <td>0%</td> </tr> <tr> <td><b>Total</b></td> <td><b>77</b></td> <td><b>100%</b></td> </tr> </tbody> </table> <p>Shetland Islands Council, March 2021</p> <p>Limited transport, ferry links and amenities in remote and rural areas are considerations for temporary accommodation location. Of the temporary accommodation units, the majority are self contained with very few as shared. All shared accommodation is based in the Lerwick &amp; Bressay Housing Market Area. The types of temporary accommodation in use at the end of March over the last 4 years by type are detailed in Table 5.5. In recent years, only local authority stock has been used for temporary accommodation.</p>	Housing Market	Number	Percentage	Lerwick& Bressay	72	94%	North	2	3%	South	1	0%	Central	2	3%	North Isles	0	0%	<b>Total</b>	<b>77</b>	<b>100%</b>
Housing Market	Number	Percentage																				
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North Isles	0	0%																				
<b>Total</b>	<b>77</b>	<b>100%</b>																				

**Table 5.3 Type of Temporary Accommodation**

Type of Temporary Accommodation	Mar-18	Mar-19	Mar-20	Mar-21
Local Authority Dwelling	97	79	86	77
Housing Association Dwelling	<5	<3	0	0
Bed & Breakfast	<4	0	0	0

Source: SIC Housing, April 2021

The use of bed & breakfast as temporary accommodation is detailed in Table 5.6. This shows how the number of times this type of accommodation has reduced over the recent years. Bed & breakfast is only used as a last resort with an emphasis to move any applicants from this type of accommodation as quickly as possible.

**Table 5.4 Bed & Breakfast Usage as Temporary Accommodation**

	2017/2018	2018/2019	2019/2020	2020/2021
Bed and Breakfast Usage	10	14	0	<5

Source: Housing Service, Shetland Islands Council, 2021

**Length of time in temporary accommodation** The average length of time a housing applicant spends in temporary accommodation has continued to be high in Shetland compared to other areas in Scotland due to a number of factors. There are challenges in reducing the length of time spent in temporary accommodation and size appropriate accommodation being available. At present, a single person applicant, looking for a property in Lerwick only, may reside in a temporary tenancy for over three years. Where someone requests to live in an area of lower demand, or requires a larger property, the length of time in temporary accommodation is diminished. There has been a recent reduction in the number of homeless presentations and applications. Our housing investment programme is increasing the supply of appropriate rented accommodation Table 5.7 provides details on the length of time in temporary accommodation over the last 5 years.

**Table 5.5 Average Length of Time in Temporary Accommodation**

Temporary Accommodation	17/18	18/19	19/20	20/21
Weeks in Temporary Accommodation	71	52	42	51

Source: Housing Service, Shetland Islands Council, 2021

Further information on the temporary accommodation provided for homeless households can be found here - [Temporary Accommodation - OP6 – Shetland Islands Council](#).

The Rapid Rehousing Transition Plan which details the plan for addressing homelessness in Shetland 2021-2026 can be found here - [RRTP – Shetland Islands Council](#)

**Houses in Multiple Occupation (HMO)** At March 2017, 13 properties had Licenses for Houses in Multiple Occupation with the majority of these being in the Lerwick & Bressay area. Within the Housing Stock, there are 3 licenced HMOs, and their uses are currently being reviewed.

**Student Accommodation** The Shetland UHI currently has no non-permanent housing for students. This is under consideration at this time.

**Migrant workers** As detailed in Chapter 2, Shetland often has to respond to the needs of a transient workforce for major infrastructure projects, eg TOTAL gas plant, Viking Windfarm. The impact of this can



	<p>quickly saturate the private rented market, making it unaffordable and often employers have to make arrangements to accommodate workers, eg using floatel accommodation.</p> <p><b>Refugees/Asylum seekers</b> Two refugee families came to Shetland in 2018 as part of the Syrian vulnerable person resettlement programme. Two units of stock were purchased by the local authority to accommodate the families. A further commitment to participate in Afghan resettlement programme has been made.</p>
	<p>External stakeholder consultation &amp; engagement</p>
	<p>External stakeholder consultation &amp; engagement in this area will be carried out at a later date which will identify any gaps and further work required.</p> <p>The provision of temporary accommodation is achieved through flexible use of existing housing stock. There has been a reduced number of presentations over the past few years and the focus on prevention has led to a reduced need for temporary accommodation. The projected future requirement would be to reduce the need for temporary accommodation gradually over time in line with our Rapid Rehousing Transition Plan.</p>

## 5.6 - Template 4 – Supported Provision

<b>1</b>	<b>National Policies</b>
1.1	<ul style="list-style-type: none"> <li>• Equality Act 2010</li> <li>• Age, Home and Community: a Strategy for Housing Scotland’s Older People, 2012-2021</li> <li>• Integration of health and social care and the Reshaping Care for Older People agendas</li> <li>• Scotland’s National Dementia Strategy 2013-2016</li> <li>• Healthcare Quality Strategy and the 2020 Vision</li> <li>• The Public Bodies (Joint Working) (Scotland) Act 2014</li> <li>• Public Bodies (Joint working) National Health and Wellbeing Outcomes (Scotland) Regulations 2014</li> <li>• Scotland’s National Dementia strategy</li> <li>• Keys To Life – improving quality of life for people with learning disabilities, 2013</li> <li>• Caring together: the carers strategy for Scotland 2010-2015</li> <li>• Mental Health Strategy for Scotland 2012-2015</li> <li>• Regulation of Care (Scotland) Act 2001 and Community Care and Health (Scotland) Act 2002</li> </ul>
<b>2</b>	<b>Local Policies / strategies</b>
2.1	<ul style="list-style-type: none"> <li>• Shetland Islands Health &amp; Social Care Partnership Strategic Commissioning Plan</li> <li>• Shetland’s Partnership Plan 2018-2028</li> <li>• SIC Allocation Policy</li> <li>• Strategic Housing Investment Plan</li> <li>• Shetland Mental Health Strategy 2014-2024</li> </ul>

<b>3</b>	<b>Property Needs</b>																																																												
	<p>The main focus in this section is on the need for sheltered and very sheltered housing. This relates to those households and individuals who require some form of support which may be met partly on-site from, for example, a key worker or Community Housing Support Worker, with additional support from a range of other health &amp; social care professionals including community psychiatric nurse, or general nurse, social worker, physiotherapist, care assistant.</p> <p>The supported provision in this section would be suitable mainly for older people; those with a physical disability, learning disabilities, or mental health issues; and people with other long-term limiting health conditions which might be affected or exacerbated by their living conditions.</p>																																																												
	<p><b>Residential Establishments</b> As at January 2022, there were 146 permanent and respite beds split across 9 establishments, as shown in Table 5.8. The majority of residential spaces are available in the Lerwick &amp; Bressay housing market area, followed by North Isles with the rest being split evenly between the other housing market areas.</p>																																																												
	<p><b>Table 5.6 Residential Establishments</b></p> <table border="1" data-bbox="363 1055 1430 1704"> <thead> <tr> <th>Housing Market Area</th> <th>Residential Establishment</th> <th>Permanent</th> <th>Respite</th> <th>Total</th> <th>% by Housing Market Area</th> </tr> </thead> <tbody> <tr> <td rowspan="2">Lerwick &amp; Bressay</td> <td>ET House &amp; Taing House</td> <td>40</td> <td>3</td> <td>43</td> <td rowspan="2">40%</td> </tr> <tr> <td>Montfield Support Services</td> <td>0</td> <td>16</td> <td>16</td> </tr> <tr> <td rowspan="3">North Isles</td> <td>Nordalea</td> <td>6</td> <td>1</td> <td>7</td> <td rowspan="3">18%</td> </tr> <tr> <td>Isleshavn</td> <td>9</td> <td>1</td> <td>10</td> </tr> <tr> <td>Fernlea</td> <td>8</td> <td>2</td> <td>10</td> </tr> <tr> <td>Central</td> <td>Walter &amp; Joan Gray (Church of Scotland)</td> <td>15</td> <td>1</td> <td>16</td> <td>11%</td> </tr> <tr> <td>West</td> <td>Wastview</td> <td>13</td> <td>2</td> <td>15</td> <td>10%</td> </tr> <tr> <td>South</td> <td>Overtonlea</td> <td>12</td> <td>2</td> <td>14</td> <td>10%</td> </tr> <tr> <td>North</td> <td>North Haven</td> <td>13</td> <td>2</td> <td>15</td> <td>10%</td> </tr> <tr> <td>Overall</td> <td></td> <td><b>113</b></td> <td><b>34</b></td> <td><b>146</b></td> <td></td> </tr> </tbody> </table> <p>Source: Social Care, Shetland Islands Council, January 2022</p>	Housing Market Area	Residential Establishment	Permanent	Respite	Total	% by Housing Market Area	Lerwick & Bressay	ET House & Taing House	40	3	43	40%	Montfield Support Services	0	16	16	North Isles	Nordalea	6	1	7	18%	Isleshavn	9	1	10	Fernlea	8	2	10	Central	Walter & Joan Gray (Church of Scotland)	15	1	16	11%	West	Wastview	13	2	15	10%	South	Overtonlea	12	2	14	10%	North	North Haven	13	2	15	10%	Overall		<b>113</b>	<b>34</b>	<b>146</b>	
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	<p><b>Sheltered Accommodation</b> At March 2021, there were 246 SIC sheltered properties and 13 HHA sheltered properties. With this type of housing, the tenants usually receive housing support from a Community Housing Support Worker. The number of sheltered properties by Housing Market Area is included in Table 5.9.</p>																																																												

<b>Table 5.7 Sheltered Accommodation</b>	
<b>Housing Market Area</b>	<b>Number</b>
<b>Central</b>	38
<b>Lerwick &amp; Bressay</b>	49
<b>North</b>	50
<b>North Isles</b>	51
<b>South</b>	39
<b>West</b>	36
<b>Total</b>	276

Source: Housing Service, Shetland Islands Council & Hjaltland Housing Service, March 2021

**Non-Traditional Sheltered Lets** Where there is a SIC sheltered property with no demand from an applicant who requires this type of accommodation, these properties can be let as a non-traditional sheltered lets. As at March 2021, there were 79 such lets. The majority of these are let in the more rural areas which provides the best use of stock and reduces the number of voids in the area, often allowing single people accommodation that would not be possible otherwise, due to the lack of smaller sized accommodation.

**Very Sheltered Accommodation** At March 2021, there were 37 extra care units in Shetland. These are split between Brucehall Terrace in Unst, King Erik House and Annsbrae House in Lerwick. This includes a 3-bed extra care dementia unit at King Erik House.

The projected ageing population is likely to lead to a greater requirement for support provision. The Council also recognises the need to review their own provision of sheltered properties. Appropriate housing options are being considered which may not mean people need to move, but they are provided services to allow them to remain in their home. The existing housing supply of sheltered and very sheltered accommodation is sufficient to meet short to medium term needs. Further data gathering and analysis of more specialist provision, eg prevalence of dementia will be undertaken with the health & care partnership.

**Hostel Accommodation** There is no hostel accommodation in Shetland.

**Refuge Accommodation** Shetland Womens Aid provides one unit of shared accommodation for supporting women and children in need of refuge. Recent annual figures show that refuge accommodation was provided each year to 5 or below women , some with children.

## 5.7 - Template 5 – Care and Support

1	<b>National Policies</b>
1.1	Equality Act 2010 Age, Home and Community: a Strategy for Housing Scotland’s Older People, 2012-2021

	<p>Integration of health and social care and the Reshaping Care for Older People agendas</p> <p>Scotland's National Dementia Strategy 2013-2016</p> <p>Healthcare Quality Strategy and the 2020 Vision</p> <p>The Public Bodies (Joint Working) (Scotland) Act 2014</p> <p>Public Bodies (Joint working) National Health and Wellbeing Outcomes (Scotland) Regulations 2014</p>
<b>2</b>	<b>Local Policies/ Strategies</b>
	<p>Shetland Islands Health &amp; Social Care Partnership Strategic Commissioning Plan</p> <p>Shetland's Partnership Plan 2018-2028</p> <p>Shetland Mental Health Strategy 2014-2024</p> <p>SIC Allocation Policy</p>
<b>3</b>	<b>Property Needs</b>

These services are available for anyone living in their own home, but needing care and/or support to continue to live independently. This will include older persons including those with dementia; young adults and looked-after children leaving formal care; persons with mental health issues, those on the autistic spectrum, and people with learning disabilities; families with other particular needs and people who have been in temporary accommodation and have moved to a permanent housing solution.

There are a wide range of relevant care and support services available in Shetland to enable people to live independently in their own. The services include the Housing Support Services, Telecare and community alarms; Home care, supported living and outreach, third sector services co-ordinated through Voluntary Action Shetland (VAS) services.

**Housing Support** –The Housing Support Service offers support to people to manage and maintain a home. The housing support team provides support, assistance and advice to individuals with particular needs with a view to enabling people to stay or to continue to stay in their accommodation. This service is available to those who are finding it difficult to maintain their accommodation, are homeless or potentially homeless, and those in sheltered housing. The service provided for tenants within social housing as well as for those in private housing.

This service is registered with the Care Commission. An annual return is submitted to the Care Commission detailing the number of people in receipt of the service. Table 5.10 details the support provided throughout the years from 2016 and a snapshot at the end of each year. Although the figures show a decrease, this is a service where there is likely to be an increase in demand while housing options and supporting people in their own homes is progressed.

**Table 5.8 Housing Support Provided by Year**

Housing Support Provided	2016	2017	2018	2019	2020
<b>Number of people who used the Housing Support Service</b>	367	343	351	330	278
<b>Number of people using the Housing Support Service at 31 December</b>	279	265	243	231	211

Source: Housing Service, Shetland Islands Council, March 2021

**The Hub** Through positive, collaborative working between agencies, The Recovery Hub and Community Network opened it’s doors in 2020 and is a service which provides support to anyone affected by alcohol or drug misuse. A Community Housing Support Worker was appointed in early 2021 to work alongside the Project Manager and the Shetland Alcohol and Drug Partnership in developing integrated housing support provision and alcohol and drug services to customers to support harm reduction, engagement with treatment and moving towards recovery and healthier lives with the focus on securing and maintaining settled accommodation.

There is also a recognition that there is insufficient data available on, for example mental health and disability. There is a requirement to develop better shared baseline information on housing and support needs of people with long term multiple health conditions and complex needs.

**Care at Home** Table 5.11 provides detail about the number clients receiving homecare and domestic care from 2019.

**Table 5.9 Care at Home**

Care at Home –	2019	2020	2021
Number of Clients Receiving Homecare services per week	323	328	353
Number of clients receiving personal care / care at home per week	254	268	300

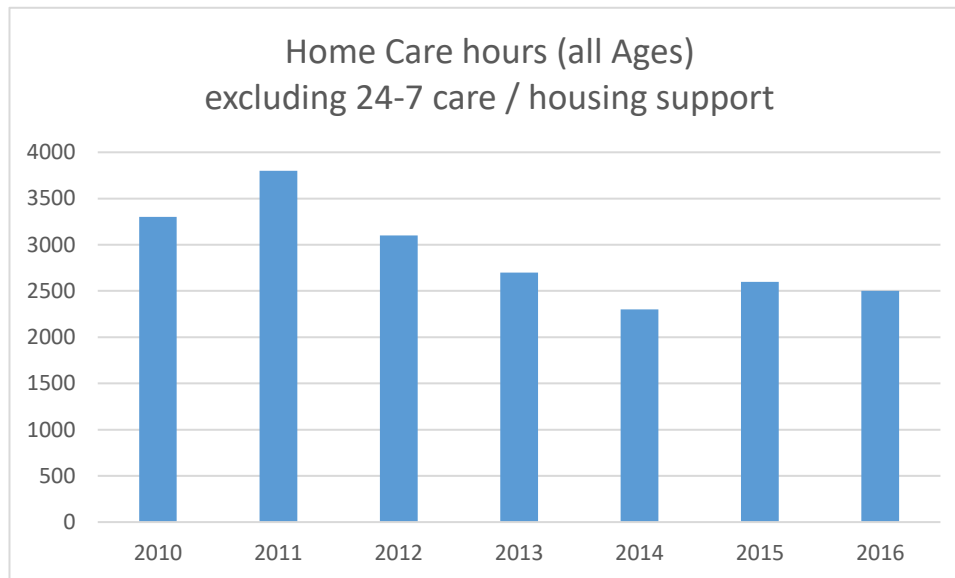
Source: Social Care, Shetland Islands Council, 2021

**Home Care Clients** The number of Home Care clients at 2010 was 470. There was a steady increase up to 2011, and there has been a decrease every year since then. Figure 5.4 provides details on how this has changed over the years to 2016 when the number of clients was 310.

**Home Care Clients by Age** Of the 301 clients, 42% were aged 85+, 35% were 75-84, 16% were 65-74 and 6% were 18-64.

**Home Care Hours** The number of home care hours for all ages of clients was at 3300 hours in 2010. There was a slight increase in 2011, and there has been a decrease every year since then. Figure 5.3 provides details on how this has changed over the years.

**Figure 5.3 Home Care Hours**



Source: Scottish Government, 2016

**Home Care** According to the Scottish Government Social Care Survey, 2015, the number of clients receiving home care per 1,000 population in Shetland was 14 which is slightly higher than the Scottish average of 12.

**Telecare Clients** Telecare technology is installed, such as community alarm, movement sensors, pendants etc, to allow people to live safely at home. Table 5.12 shows the number of clients in receipt of telecare services in Shetland has increased from 570 in March 2016 to 662 in March 2018. The majority of clients are over the age of 75.

**Table 5.10 Telecare Clients**

Telecare Clients	Mar-16	Mar-18
Number of Telecare Clients	570	662
<b>% by Age Bracket</b>	<b>%</b>	<b>%</b>
0-18	0	1
19-64	11	12
65-74	12	11
75-84	35	38
85+	42	39
Total %	100	100

Source: Social Care, Shetland Islands Council, 2018

**Community Alarm Systems** At May 2017, 502 properties had a community alarm system installed. This service is available through all tenures and from the data available, 70% were in private housing and 30% were in social housing. Table 5.13 shows how these are distributed within Shetland.

**Table 5.11 Community Alarms by Housing Market Area**

Housing Market Area	Number	%
<b>Lerwick &amp; Bressay</b>	207	37%
<b>North Isles</b>	82	15%
<b>South</b>	98	18%
<b>Central</b>	63	11%
<b>North</b>	64	12%
<b>West</b>	40	7%
<b>Total</b>	554	100%

Source: Social Care, Shetland Islands Council, 2017

**Mental Health and Wellbeing Shetland Adults** The Scottish Health survey (2012-2015)<sup>[1]</sup> uses a sample of 100 people every 3 years. Within this survey the Warwick-Edinburgh Mental Health and Wellbeing Scale (WEMBS) is used to measure wellbeing of the adult population, which ranges from lowest level with a score of 14 to highest with a score of 70. The results for 2012-2015 show that the mean score for Scotland was 50.0, whilst Shetland was 50.7, with Orkney being 50.8 and Western Isles and Highlands being the highest at 51.1.

	<p>The office for national statistics<sup>[2]</sup> undertakes a survey on estimates of personal wellbeing by measuring the elements of satisfaction, worthwhile and anxiety in marks out of 10. The results for Shetland show that Shetland scored 8.14/10 for worthwhile whilst they scored 2.56 for anxiety.</p> <p>The results of these surveys correlate with each other strengthening the argument that there are high levels of wellbeing across the adult population of Shetland.</p> <p><b>Self-reported Health Status</b> The proportion of adults rating their health as ‘good’ or ‘very good’ reduces with increasing age. The reporting of poor, or very poor, health amongst those aged 65 and over is associated with deprivation, smoking status and alcohol consumption. 2011 Census data shows that overall, in Shetland, 86% of people self report their health as good or very good; and 3% as bad or very bad. Amongst the oldest age group, 85 and older, only 36% report their health as good or very good; and 17% report their health as bad or very bad.</p>
	<p>Some people with learning disabilities and autistic spectrum disorders are able to use generic services including those for older people, while others will require specialist services and support to meet their needs and outcomes. It is difficult to accurately project the numbers of people with learning disabilities and autistic spectrum disorders in the longer term. Current numbers in the age group 10 to 25 show that in the past, over a period of 15 years, on average 8.8 people per year were born with a learning disability/ autistic spectrum disorder with approximately one third of those, i.e.2.9 people, likely to require day services.</p> <p><b>Living Arrangements for those with Learning Disabilities</b> Of the 154 adults with learning disabilities, 48% live with a family carer, 44% do not live with a family carer and the other 8% is unknown. Across Scotland, Shetland has the 7<sup>th</sup> highest % of adults with learning disabilities who live with a family carer at 48%, with the Scotland average being 34.7%.</p> <p>The projected ageing population is likely to lead to a greater requirement for support provision and the challenges associated with this to ensure adequate provision is available. The figures reflect a housing support service redesign carried out in 2015 which offers statutory and non statutory support on a needs basis across all HMAs. Currently approximately 3% of households in Shetland are in receipt on a housing support service and due to the ageing population this would expected to increase to 5% by 2038, in line with population projections.</p>

## 5.8 - Template 6 – Gypsy / Traveller Site Provision

1	National policies
1.1	Scottish Government Equality Outcome (Equality Act 2010) Social Housing Regulator/ Scottish Social Housing Charter & ARC Equal Opportunities Committee inquiries Scottish Planning Policy



	Improving Gypsy / Traveller Sites, Scottish Government 2015
<b>2</b>	<b>Local policies / strategies</b>
2.1	Local Housing Strategy 2011 to 2016
<b>3</b>	<b>Land Needs</b>
3.1	There is no site provision for gypsy travellers or travelling show people. A procedure is in place to use regarding encampment, if and when required.
<b>4</b>	<b>Care and Support Needs</b>
4.1	There is no site provision for gypsy travellers or travelling show people.
<b>5</b>	<b>Suitable for : Gypsy / Travellers</b>
<b>6</b>	<b>Evidence</b>
6.1	At present there is no required land needs for sites or support required for gypsy / travellers or travelling show people.
<b>7</b>	<b>External stakeholder consultation &amp; engagement</b>
7.1	No stakeholders available for consultation.