

MY LIFE IN THE HIGHLANDS AND ISLANDS RESEARCH

Shetland

Summary report

October 2022



EXECUTIVE SUMMARY – SHETLAND

This report presents the findings of a large-scale survey conducted by Ipsos on behalf of Highlands and Islands Enterprise (HIE) between 28th January and 25th March 2022. In total, 5,301 adults aged 16+ living in the Highlands and Islands of Scotland responded to the survey, including 365 in Shetland.

Connectivity and access to services

Most households in Shetland have a hall/function room (78%), primary school (73%), day time bus service (72%), convenience store (66%) and post office (61%) available within a 15-20 minute walk of home. However, higher proportions than regionally need to travel further afield to access other key services and facilities.

Households in Shetland are less likely than those across the region overall to be able to access a bank, cottage/community hospital or supermarket locally (around seven in ten can't). They are also less likely to have local access to a post office, secondary school, convenience store, supermarket, or a recycling centre.

Excluding those who don't know about service availability, households in Shetland are less likely than average to be able to access some key health services either within a 20-minute drive or online: 33% cannot access mental health services, 28% a physiotherapist or 25% a dentist.

Findings illustrate that some everyday challenges are harder for residents in Shetland with households more likely than regionally to find it difficult to have a takeaway delivered (77%), take out money from a cash machine (55%) or stream a TV programme/film online without pauses or buffering (29%).

Housing

Most households in Shetland feel their housing situation meets their needs, although they are more likely than average to say their home is expensive (63%) or difficult to heat (23%). Compared to the Highlands and Islands overall, more report a shortage of housing (85% say this) and that the right types of housing aren't available for local people (82%).

Employment and training

17% of those in work in Shetland have more than one job (13% do so regionally). 15% are self-employed (19% regionally) and around one in ten would like to start their own business (8% vs 12% overall). A third (31%) who have not accessed training would find it difficult to do so in person and 15% to do so online. The main reasons for this are broadband not being fast enough, having to spend time away from home, and cost.

Impact of Covid-19 and transport

90% of households say goods and services are more expensive in their local area now than they were before the pandemic. Fewer than regionally say that businesses that closed because of lockdown haven't reopened.

Residents in Shetland are more likely than average to rely on ferry (57%) and air services (48%), and over half (54%) feel that increased numbers of tourists have made it hard for local people to access these services. Levels of satisfaction with ferry frequency and reliability are higher than regionally, but are lower for cost. Satisfaction with cost and reliability of air services is also lower than regionally.

Participation, pride and local decision making

57% of residents take part in activities in their local community (vs 55% for the region overall) including attending community events, membership of local groups/sports clubs, and volunteering. Board membership is more common in Shetland than regionally.

90% of residents express pride in their community (88% overall), although they are divided on the extent to which local people can influence decision-making.

Towards net zero

39% of households are planning energy efficiency improvements in the next two to three years, most commonly installing draught proofing (16%), a smart meter (15%), new boiler or heating system (10%), or double or triple glazing (10%).

Almost half (47%) of those in work in Shetland believe their job will be affected by the move towards net zero, in line with the region overall.

Priorities for communities to thrive

Around half (51%) of Shetland residents are optimistic about their community. The top priorities residents cite for communities in Shetland to thrive are: housing for local families (55%), improved broadband (31%) and more job opportunities (23%). Housing and broadband, along with improved transport connections with other parts of Scotland (22%) and improved mobile phone coverage (19%) are higher priorities for Shetland residents than regionally.

ACCESS TO FACILITIES AND SERVICES (1)

Most households in Shetland have a hall/function room (78%), primary school (73%), day time bus service (72%), convenience store (66%) and post office (61%) available within a 15-20 minute walk of home. However, more than 7 in 10 do not have a bank (73%), cottage/community hospital (71%), or a supermarket (71%) available within this distance, and two-thirds do not have a recycling centre available locally.

29% OF HOUSEHOLDS SAY IT IS DIFFICULT TO STREAM A TV PROGRAMME OR FILM higher than the region overall (21%)

55% OF HOUSEHOLDS SAY IT IS DIFFICULT TO TAKE OUT MONEY FROM A CASH MACHINE higher than the region overall (28%)

77% OF HOUSEHOLDS SAY IT IS DIFFICULT TO HAVE A TAKEAWAY DELIVERED higher than in the region overall (44%)

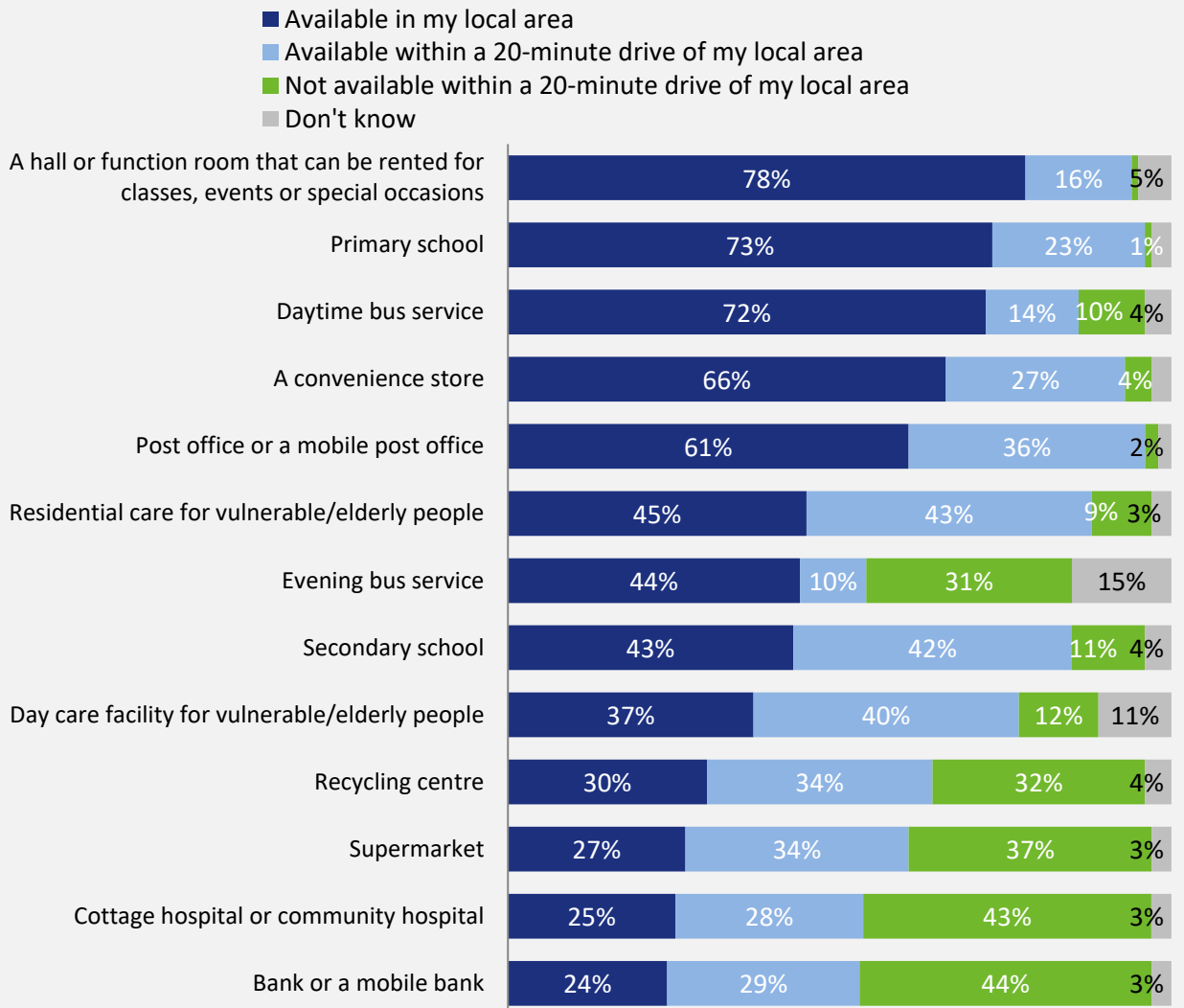
Households in Shetland are less likely to say they are able to access certain services within their local area compared to the Highlands and Islands overall, including:

- a **bank/mobile bank** (24% vs 45%)
- a **secondary school** (43% vs 51%)
- a **convenience store** (66% vs 74%)
- a **supermarket** (27% vs 47%)
- a **post/mobile post office** (61% vs 68%)
- a **recycling centre** (30% vs 41%)
- a **cottage/community hospital** (25% vs 35%).

However, they are more likely to say they are able to access:

- **day care for vulnerable/elderly people** (37% vs 27%)
- a **hall or function room** (78% vs 70%).

Q. For each of the following facilities or services, please indicate whether each is currently available within your local area or within a 20-minute drive of your local area. By local area we mean the area within a 15-20 minute walk from your home.



Base: All households in Shetland (309); fieldwork = 28 January – 25 March 2022

ACCESS TO FACILITIES AND SERVICES (2)

Most households in Shetland have access to a GP (86%) permanently located within a 20-minute drive of their local area, and more than half have a midwife or health visitor (58%), home care services for vulnerable or elderly people (58%) and dentist (56%) permanently located within this distance. Fewer say they can access a physiotherapist or mental health services in person, although between 20-24% don't know whether they can access these services locally or not.

Excluding those who don't know whether the service is available locally, households in Shetland are more likely than those across the region overall to say they are unable to access **mental health services (33% vs 20%)**, a **physiotherapist (28% vs 11%)**, or a **dentist (25% vs 15%)** either within a 20-minute drive or online. They are less likely to say they cannot access a **GP (1% vs 3%)**

Lack of access to a **midwife or health visitor (3% vs 5%)** and **home care services (4% vs 6%)** is similar to the region overall.

Reliance on and satisfaction with transport services

The vast majority of households in Shetland own at least one vehicle (87%), with 40% owning two or more cars, in line with the region overall (87% and 44% respectively).

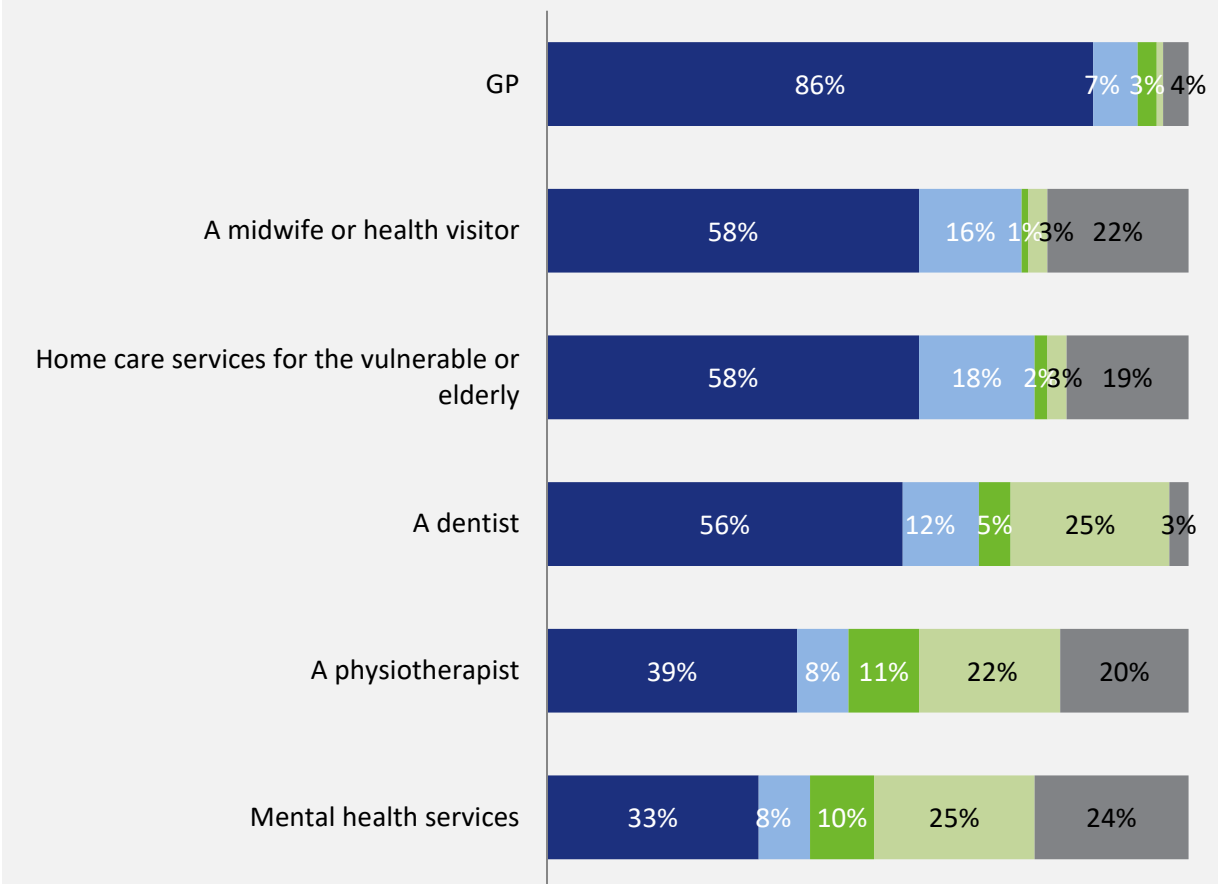
- 89% rely on a car or van, in line with the region overall at 87%
- 57% rely on ferries, higher than in the region overall at 23%
- 48% rely on air transport, higher than regionally at 17%
- 19% rely on buses, in line with the region overall at 20%.

Levels of satisfaction with **ferry frequency and reliability (74% and 59% satisfied)** are higher than regionally (52% and 45%). However Shetland residents are more likely to be dissatisfied with the **cost of ferry travel (67% compared to 36% overall)**.

81% of residents are dissatisfied with the **cost of air services**, higher than the region overall at 41%. Shetland residents are also more likely to be dissatisfied with the **reliability of air services (39% dissatisfied compared to 17% overall)**.

Q. For each of the following health and care services, please indicate which best describes their availability within your local area?

- This service is permanently located within a 20-minute drive of my local area
- A visiting service is available within a 20-minute drive of my local area
- This service can be accessed online, but it is not available within a 20-minute drive of my local area
- This service cannot be accessed either online or within a 20-minute drive of my local area
- Don't know



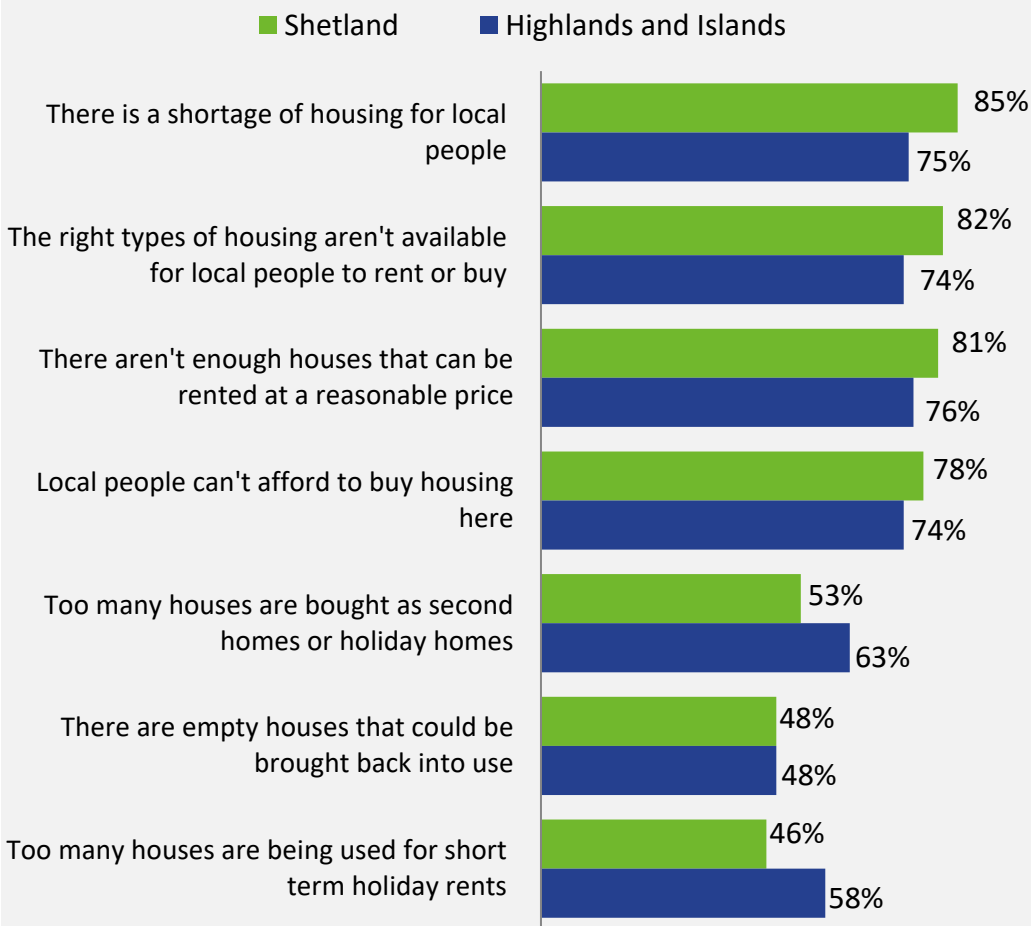
Base: All households in Shetland (309); fieldwork = 28 January – 25 March 2022

HOUSING SITUATION

Most households in Shetland (87%) say their housing situation meets their needs well (90% regionally). However, almost two-thirds (63%) say their home is expensive to heat and 23% that it is difficult to heat, both higher than for the region overall. Households in Shetland are more likely than average to say that there is a shortage of housing and the right types of housing aren't available for local people. However residents are less likely to say too many houses are being used for short-term holiday rents or too many houses are bought as second or holiday homes.

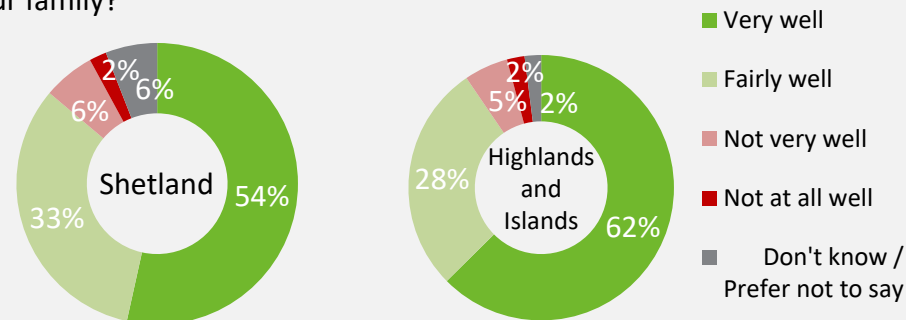
Q. To what extent does each of these describe the housing situation in your local area?

(% Describes what is happening in local area very well/at least somewhat)



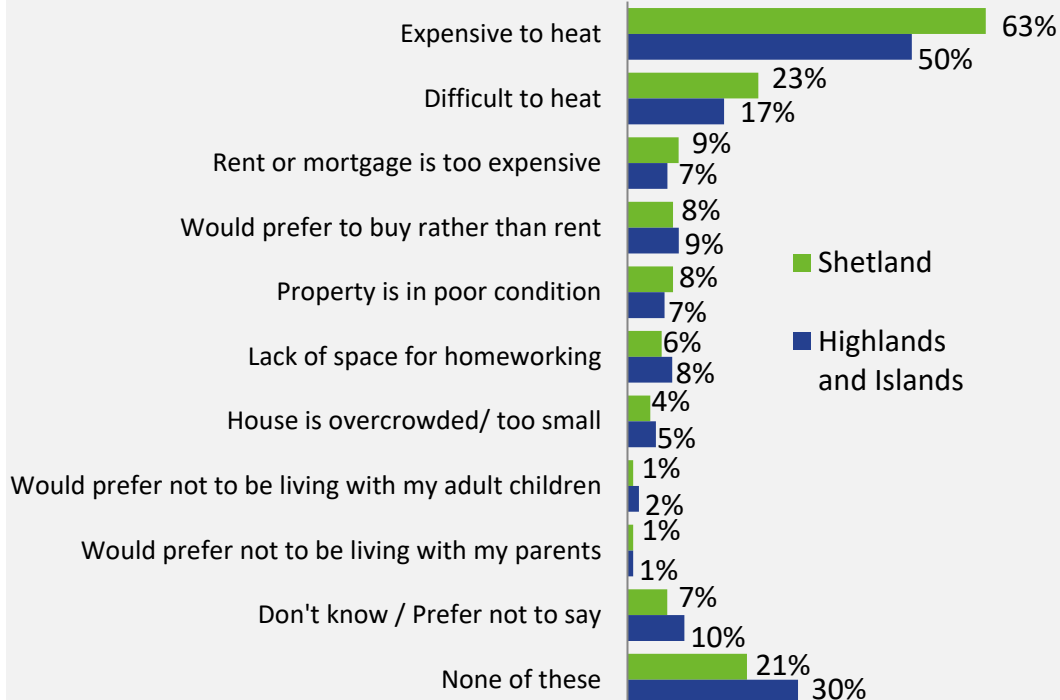
Base: All households in Shetland (309) and the Highlands and Islands (4,442); fieldwork = 28 January - 25 March 2022

Q. How well does your current housing situation meet the needs of you and your family?



Base: All households in Shetland (309) and the Highlands and Islands (4,442); fieldwork = 28 January - 25 March 2022

Q. Which if any of the following apply to your current housing situation?



Base: All households in Shetland (309) and the Highlands and Islands (4,442); fieldwork = 28 January - 25 March 2022

EMPLOYMENT, ENTREPRENEURSHIP AND TRAINING

15% of those in work in Shetland are self-employed and 8% would like to start their own business. 74% of those in work say they are happy in their current job and 61% are paid at least the Real Living Wage, higher than in the region overall. Nearly half of those in work (47%) say their job would be affected by the need to reduce carbon emissions, in line with the regional average.

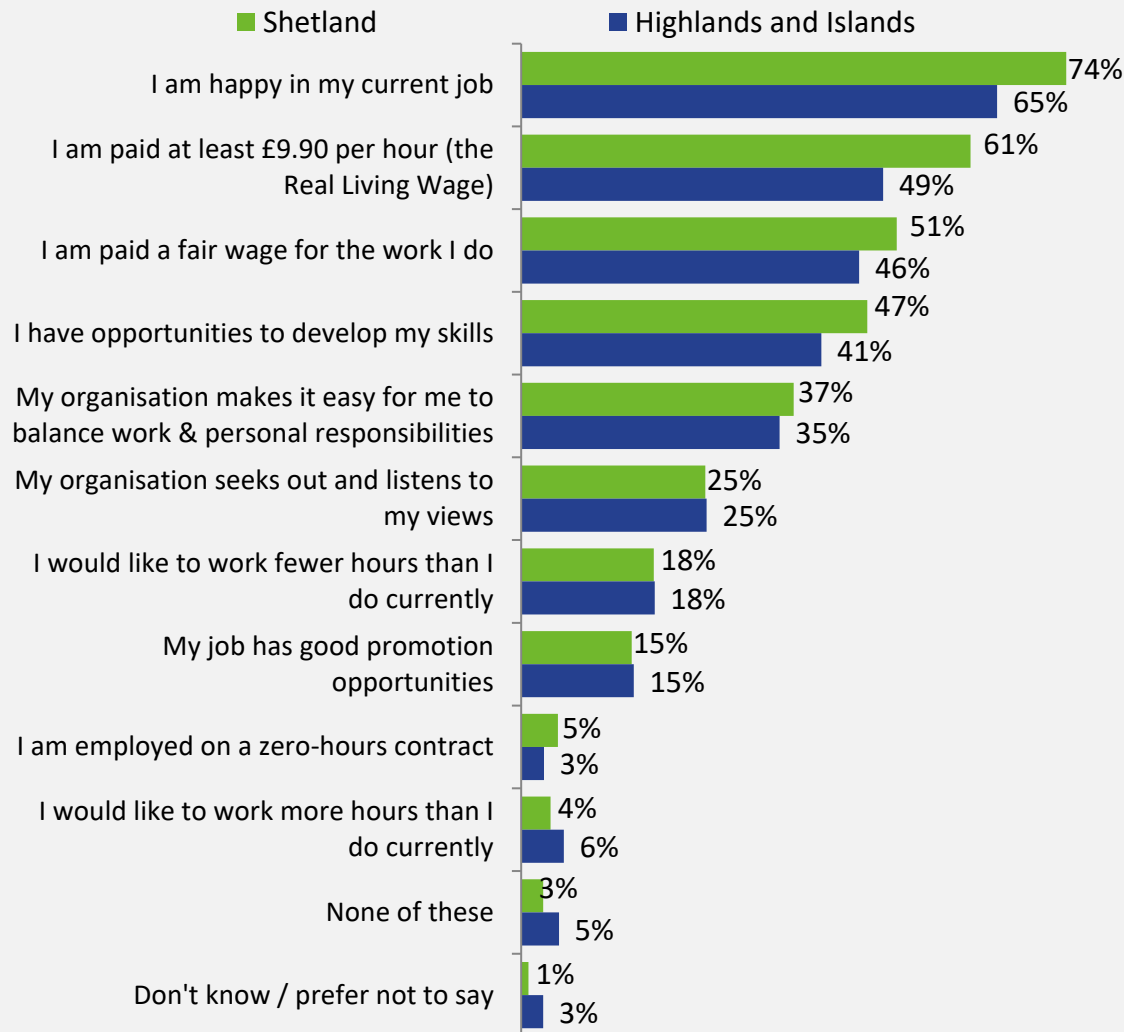
43% work in the private sector
(similar to the region overall at 49%)

44% work in the public sector
(similar to the region overall at 42%)

7% work for a charity/voluntary organisation
(in line with the region overall at 6%)

15% are self-employed
(similar to the region overall at 19%)

Q. Which if any of the following would you say apply to you in your current job?



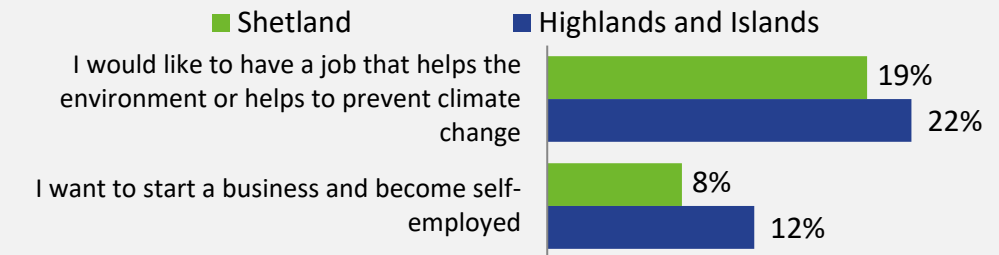
Base: All in work, aged 16+ in Shetland (167) and in the Highlands and Islands (2,240); fieldwork = 28 January - 25 March 2022

17% of those in work have more than one job, similar to the region overall at 13%.

11% of those aged 65+ are still in work, similar to the region overall at 13%.

Work aspirations are in line with the region overall.

Q. Thinking about your working situation over the next five years, which of these apply to you, if any?



Base: All who are employees, looking for work or studying, aged 16+ in Shetland (144) and the Highlands and Islands (2,031); fieldwork = 28 January - 25 March 2022

47% of those in work say that their job would be affected by the need to reduce carbon emissions, in line with the region overall (46%).

31% of Shetland residents who have not accessed training say they would find it difficult to do so in person from where they live, in line with the region overall (30%). **15%** say they would find it difficult to do so online (higher than the region overall at 9%). The main barriers to accessing training are: broadband not fast enough (35%), having to spend time away from home (34%) and cost not affordable (31%).

Residents in Shetland are **more likely than average to say that local training opportunities allow young people to stay in the area** (55% agree vs 37%).

IMPACT OF COVID-19 ON ACCESSING GOODS AND SERVICES

There is consensus among Shetland residents that it is more expensive to buy goods and services now than it was pre-pandemic, with 90% saying this is the case in their local area, in line with the region overall. Residents are more likely to say increased numbers of tourists have made it difficult for local people to access ferry or air services and that community events haven't restarted. More positively, fewer people in Shetland than in the region overall say that businesses that closed because of lockdown haven't reopened.



90% say it is more expensive to buy goods and services now than it was before the pandemic, in line with the region overall (89%).



61% say it has been more difficult for households in Shetland to get tradespeople to do work around residents' houses, similar to the region overall (67%).



80% say community events have been cancelled and haven't restarted. This is higher than the region overall (72%).



54% of households say increased numbers of tourists have made it hard for local people to access ferry or air services, higher than the region overall (34%).



69% say people are supporting local businesses more than they used to, similar to the region overall (67%).



42% say people have been moving to live here because they can work from home, similar to the region overall (45%).



63% of households say it is more difficult to get hold of goods needed now than it was before the pandemic, similar to the region overall (61%).



37% say businesses that closed because of lockdown haven't reopened, lower than the region overall (56%).

PARTICIPATION, PRIDE AND LOCAL DECISION MAKING

More than half of residents (57%) report taking part in activities in their local community, in line with the region overall (55%). Most commonly these are: attending local community events, membership of local groups or sports clubs or volunteering for a charity, social enterprise or community group. A higher proportion than average are board members of local groups or charities.


There is scope to improve feelings of influence over local decision making. Residents are split on the extent of their influence which reflects the regional picture.

Participation

 **44%** ATTEND LOCAL COMMUNITY EVENTS,

 **28%** ARE MEMBERS OF LOCAL GROUPS OR SPORTS CLUBS

 **23%** VOLUNTEER

 **15%** ARE BOARD MEMBERS higher than the region overall

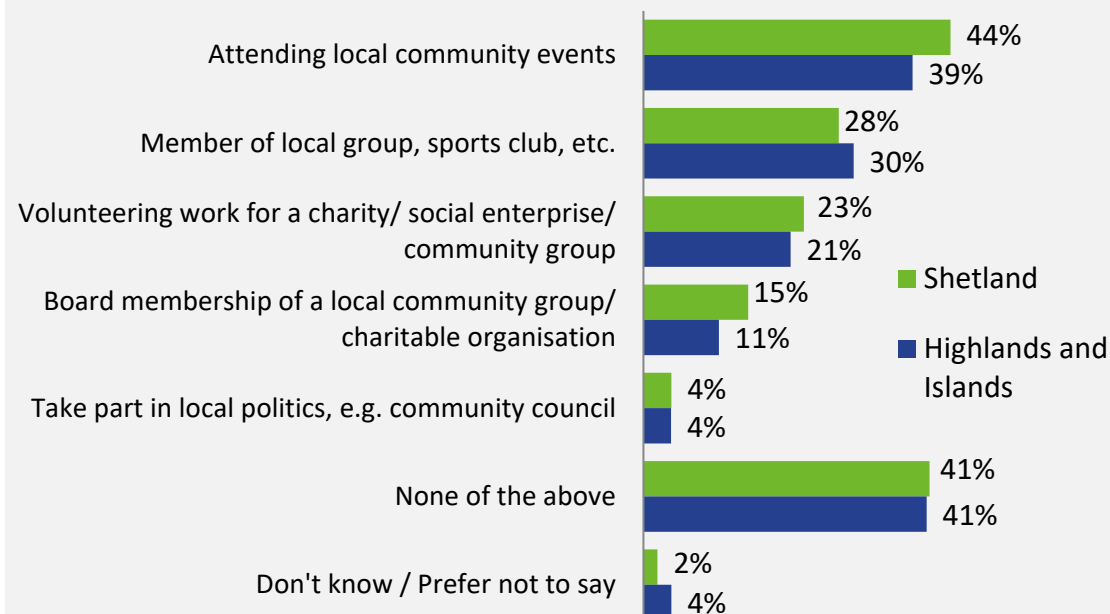
Pride
90% ARE PROUD TO LIVE IN SHETLAND similar to the region overall (88%)

Local decision making

 **34%** AGREE THAT LOCAL PEOPLE CAN INFLUENCE DECISION MAKING IN THEIR LOCAL AREA

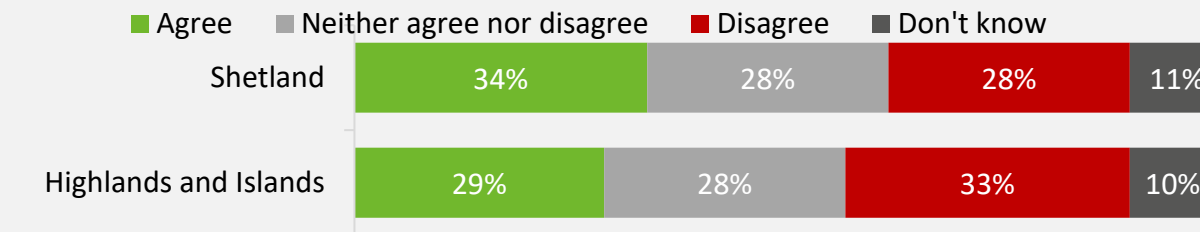
28% DISAGREE

Q: Which of the following do you personally participate in as part of your community, if any?



Base: All residents, aged 16+ in Shetland (365) and the Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

Q: To what extent would you agree or disagree that local people are able to influence decisions made about your local area?



Base: All residents, aged 16+ in Shetland (365) and the Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

TOWARDS NET ZERO – ENERGY SOURCES AND ELECTRIC VEHICLES

The most commonly used energy sources for heating homes in Shetland are electricity, oil and wood/biomass, with the use of electricity higher in Shetland than in the region overall (there is no access to the gas grid in Shetland). Air source heat pumps are the most commonly used green technology for home heating (7%), while solar panels are less common in Shetland than in the region overall. Relatively few households currently have, or plan to buy or lease an electric or hybrid car, and households in Shetland are more likely than regionally to say it would be difficult to charge an electric vehicle locally.



Dwelling types

More households in Shetland live in a detached house (55%) compared to the average across the region (47%). Fewer live in a terraced house (6% compared to 11% overall).



Electric cars

9% of households in Shetland own or lease an electric or hybrid car and 7% plan to buy or lease one, in line with the region overall (7% and 6% regionally). A fifth of households (21%) have thought about buying or leasing an electric/hybrid car and decided against it, and 26% have not yet made a decision (26% and 24% regionally).

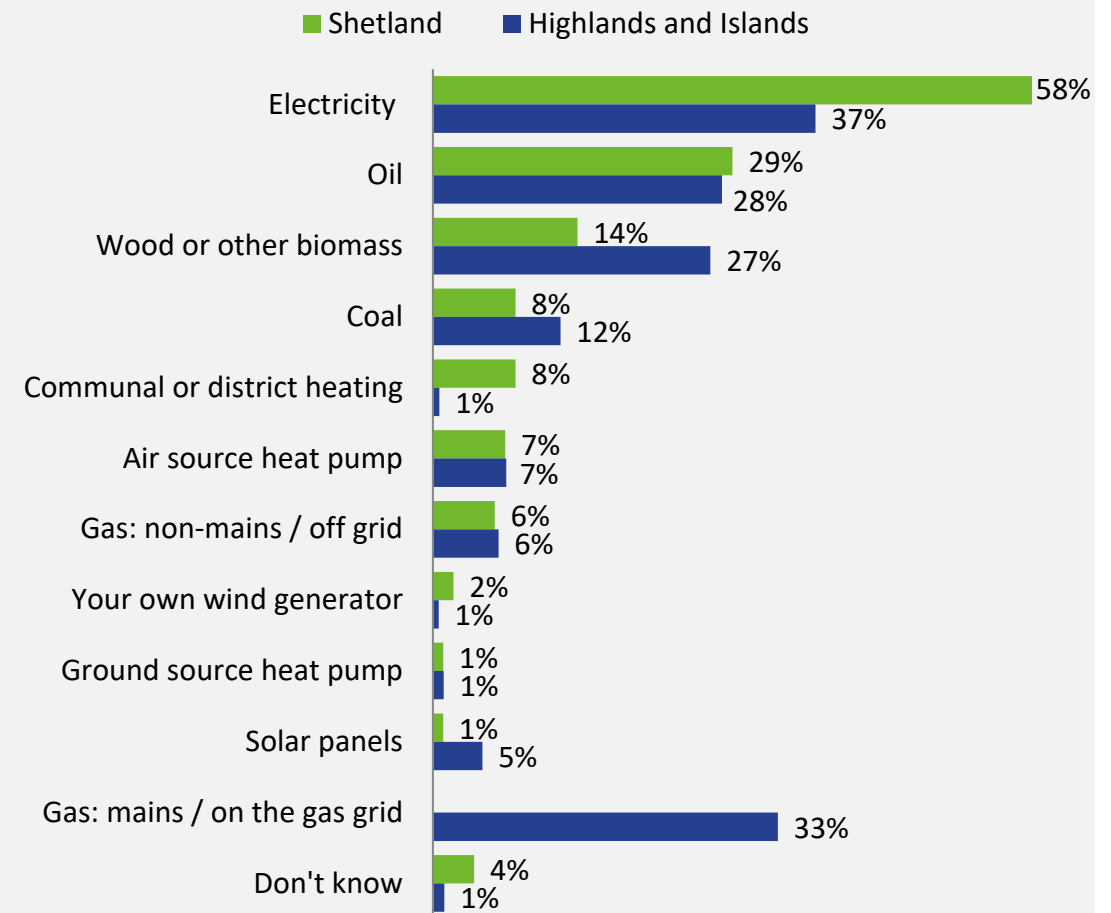
Consistent with the region overall, cost (82%) and availability of public charging points (78%) are key concerns in relation to owning or leasing electric or hybrid cars (85% and 76% respectively regionally). Concerns are lower than average in terms of distance covered on a single charge (61% vs 80%).

70% of households in Shetland would find it difficult to charge an electric vehicle on the street or at a car park, higher than in the region overall at 57%.

NOTES

In this report, green technology refers to air/ground source heat pumps, solar panels and wind generators.

Q. Which of these types or sources of energy do you use to heat your home?



Base: All households in Shetland (309) and the Highlands and Islands (4,442); fieldwork = 28 January - 25 March 2022

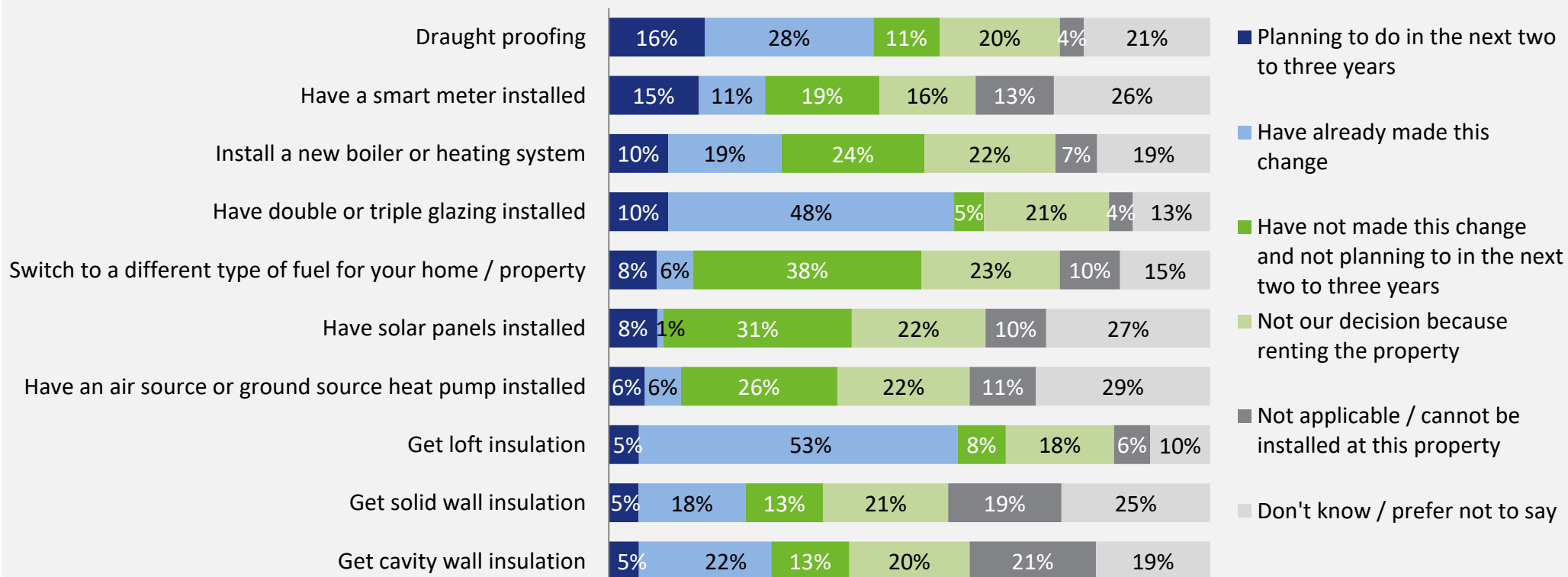
TOWARDS NET ZERO – ENERGY EFFICIENCY IMPROVEMENTS

Households in Shetland are just as likely to be planning energy efficiency improvements as the region overall. The most commonly planned actions are draught proofing (16%, higher than the region at 9%), installing a smart meter (15%), installing a new boiler or heating system (10%) and installing double or triple glazing (10%, higher than the region at 7%).

The main reasons why households in Shetland are unlikely to change the type of fuel used in their property in the next two to three years are: because it is too expensive (47%), they don't want to (35%) and there is not enough financial support available (30%).

39% OF HOUSEHOLDS IN SHETLAND ARE PLANNING TO MAKE AT LEAST ONE ENERGY EFFICIENCY IMPROVEMENT IN THE NEXT TWO TO THREE YEARS, SIMILAR TO THE REGION OVERALL AT 36%

Q. Which of the following, if any, are you planning to do in the next two to three years?



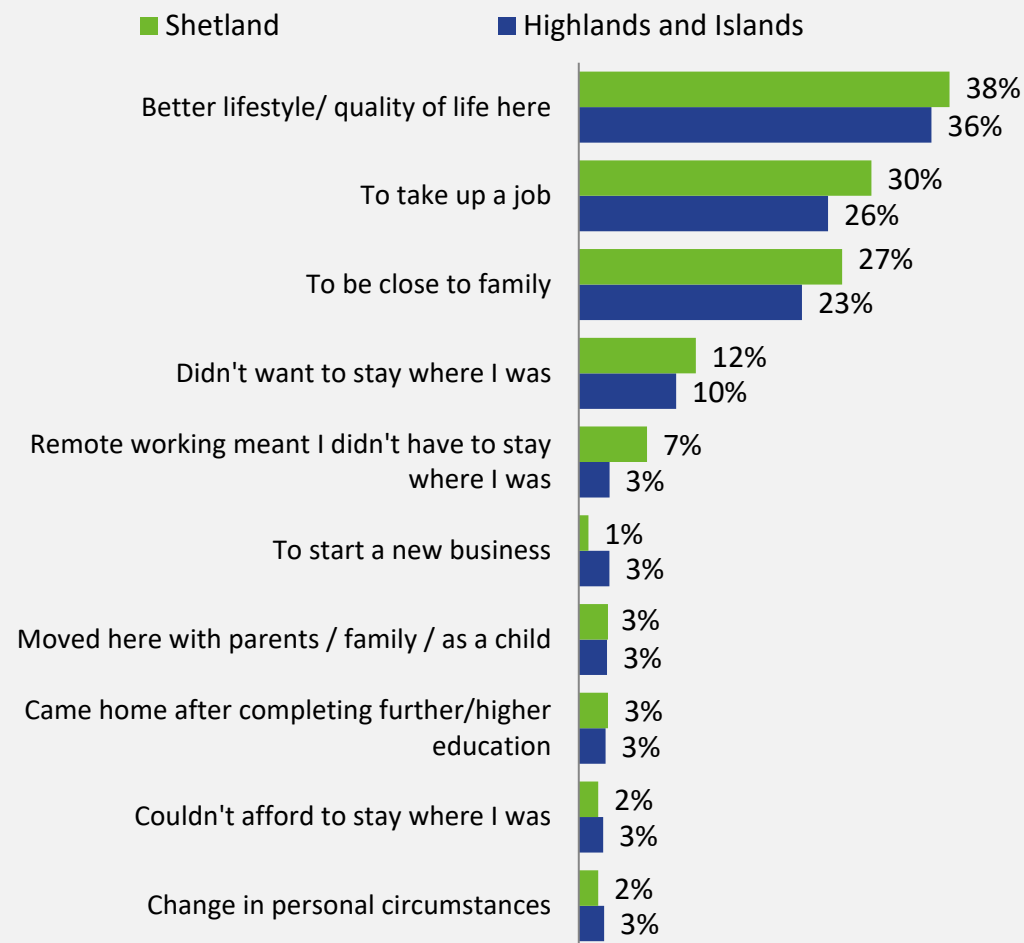
Base: All households in Shetland (309); fieldwork = 28 January - 25 March 2022

POPULATION MOVEMENT AND MIGRATION TO THE AREA

Among residents in Shetland who had not always lived in the Highlands and Islands, the main reason for moving to the region was for a better quality of life, similar to the regional average.

Households in Shetland are less likely to say that most of the people moving to their local area are retired or that people are leaving because they can't find work. They are more likely to say people are moving there for new job opportunities.

Q: Why did you move to, or move back to, the Highlands and Islands?
[Top ten reasons]



Base: All residents who have not always lived in the Highlands and Islands, aged 16+ in Shetland (162) and the Highlands and Islands (3,449); fieldwork = 28 January - 25 March 2022

Among those in Shetland who have not always lived in the region:



38% say they moved to the region for a better lifestyle/quality of life, similar to the region overall



30% moved to take up a job, similar to the region overall



27% say they moved to be close to family, similar to the region overall

Among all households in Shetland:

47% say new businesses are starting up, in line with the region overall at 46%

42% say most of the people who move to their local area are retired, lower than the region overall at 56%

42% say more people are moving to their local area for new job opportunities, higher than the region overall at 29%

31% say people are leaving their local area because they can't find work, lower than the region overall at 47%

PRIORITIES FOR COMMUNITIES TO THRIVE

The top priorities for communities in Shetland to thrive are: housing for local families, improved broadband and more job opportunities. Housing, broadband, transport connections and mobile phone coverage are higher priorities for Shetland residents than regionally.

Optimism

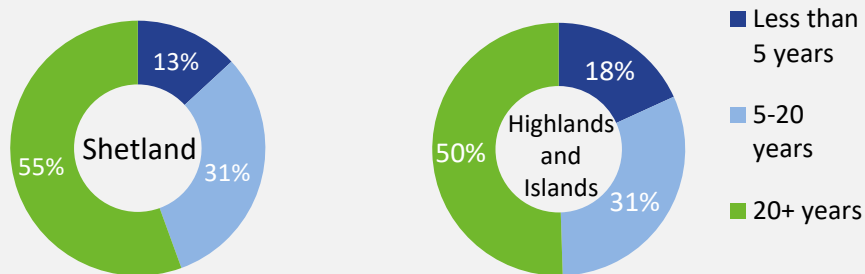
51% of Shetland residents are optimistic about their community while 12% are pessimistic, similar to the region overall (52% and 16%).

Length of residence and future intentions

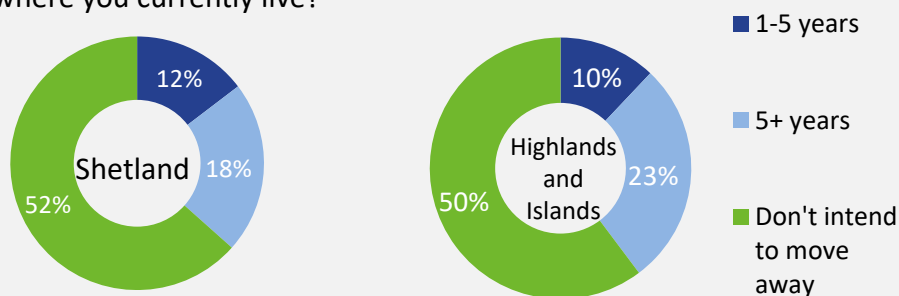
55% of Shetland residents have lived in their local area for more than 20 years. 31% have lived there for between 5 and 20 years. 13% have lived there for less than five years, lower than the region overall at 18%.

In terms of future intentions, 52% of residents don't intend ever to move away from their local area, similar to the region overall at 50%.

Q. How long have you lived in your local area?



Q. Which of these best describes how long you plan to stay in the local area where you currently live?

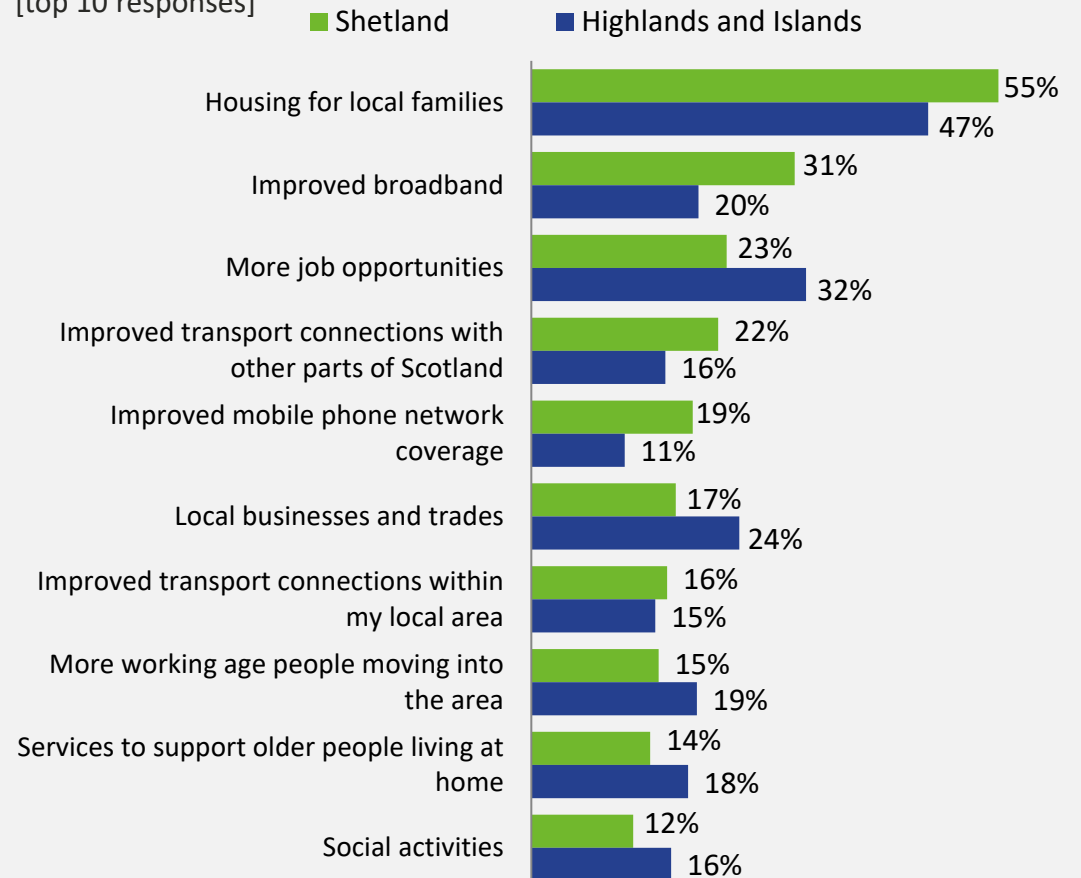


Base: All residents, aged 16+ in Shetland (365) and the Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

Priorities

Housing for local families (55% vs 47%), improved broadband (31% vs 20%), improved transport connections with other parts of Scotland (22% vs 16%) and improved mobile phone coverage (19% vs 11%) are higher priorities for communities in Shetland, compared to those in the region overall.

Q. Which of these, if any, does your community need to thrive in the future? [top 10 responses]



Base: All residents, aged 16+ in Shetland (365) and the Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

METHODOLOGY

Sampling

In total 18,087 households were invited to take part in the survey. These were randomly selected from the Royal Mail's Postcode Address File (PAF) from among all households based in the eight HIE regional office areas. Households were disproportionately sampled in Caithness and Sutherland, Inness Gall, Orkney and Shetland, to allow for a large enough sample size in these areas to carry out subgroup analysis.

Method

The survey was carried out using a push-to-web methodology. Residents were able to complete the survey online or using a paper questionnaire. Each address on the sample was sent up to three letters, inviting them to take part in the survey:

- The first letter invited participants to take part in an online survey, using a supplied website link and two unique access codes. Up to two members of the household were invited to take part in the online survey.
- Two weeks later a reminder postcard, containing the online survey link and access code, was sent to those households yet to respond.
- In another two weeks a final letter was sent to those households yet to respond which, along with the invite to the online survey, also contained one copy of a paper version of the survey and a postage paid return envelope.

All residents who completed the survey were offered a £5 shopping voucher to thank them for their time.

Fieldwork

The survey fieldwork was conducted between 28 January and 25 March 2022. In total 5,301 eligible interviews were achieved (3,322 online and 1,979 postal surveys) – a response rate of 28%.

In Shetland, 365 interviews were achieved.

Weighting was applied to correct the distribution of the sample to more closely match the overall Highlands and Islands population. The data was weighted by age, gender, working status, number of adults in household, tenure and area of the region using National Records of Scotland Mid-2020 Population Estimates and Scottish Household Survey 2019 data.



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