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OUR NEXT GENERATION

Young People in Shetland Attitudes and aspirations. Research report

September 2015

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Iomairt na Gàidhealtachd 's nan Eilean

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1 Introduction

1.1 This report presents the findings of a wide-ranging study to explore the attitudes and aspirations of young people aged 15-30 in relation to the Highlands and Islands (H&I) of Scotland, with a particular focus on young people in Shetland. Overall, a total of 4,409 young people from within and outwith the H&I participated in the research, sharing their views on the region as a place to live, work and study. This summary report analyses the views of 122 young people in Shetland who contributed to the research.

1.2 The report presents findings for Shetland as a whole, providing comparisons with the results for the wider H&I. Where possible, analysis is also provided for young people living in Lerwick (the administrative centre), highlighting where their views differ from those living elsewhere in Shetland[1].

Approach

1.3 The approach made extensive use of social media, through which young people were invited to complete an online survey. Two high schools in Shetland participated in the study. An online discussion portal allowed young people to provide further insight on their views. The study also gathered perspectives from stakeholders from both within and outwith the H&I region, including representatives from public sector and other organisations.

Study Context

1.4 The H&I have a deficit of young people, and there has traditionally been an outflow of young people from the region; this has also been the case with Shetland. There are a wide range of factors that impact on the choices and aspirations of young people, including educational and employment opportunities, the cost of living, transport, housing, cultural and connectivity issues. There are also strong local factors affecting decision-making, including close community ties for many young people in the region.

1.5 There are a range of policies and strategic interventions that have been, and are being, implemented, both locally within Shetland, across the H&I region and nationally. These have a varying level of explicit focus and degree of impact on young people in the region.

The Shetland Context

Population and Impact of Geography

1.6 Census data from 2011 highlights the 'deficit' of young people that exists across the H&I. In 2011, there were 3,999 young people aged 15-29 recorded as living in Shetland, 17% of the total population, compared to 16% across the H&I and 20% across Scotland. Although a slightly smaller population deficit than other Local Authorities across the H&I, population growth for young people aged 15-29 years between 2001 and 2011 (4%) was much lower than the H&I average growth rate of 10%, although still higher than the Outer Hebrides (1%), Lochaber, Skye and Wester Ross (2%) and Argyll and the Islands (3%). Between 2010 and 2012, Shetland had

[1]Note: an overview of survey respondents by geography, age, gender, and status, can be found in Appendix 1

a lower level of net out-migration than the rest of the H&I (except Orkney) for people aged 15-29 years, but even so, its young population is expected to decrease 17% by 2037.[2]

1.7 Shetland covers a large geographic area of approximately 1,466 km² and, with a total population of 23,200 at the time of the 2011 Census, has a very low population density of approximately 16 inhabitants per km². It is one of the most remote areas of Scotland, with a strong Nordic influence on its culture and history. The largest population centre is Lerwick, which is also the administrative centre. Since the 1970's, Shetland has become a major oil and gas location, which has bought wealth and employment to the islands, as well as a number of associated challenges.

1.8 Given that the Shetland Islands are situated almost 200 kilometres from the Scottish mainland, access to Aberdeen, the Central Belt and other parts of Scotland and beyond is achieved through air and ferry transport services from the archipelago's main island. Shetland's remote location gives rise to a number of infrastructure and connectivity issues that have a bearing on potential growth opportunities, at least to some extent.

Key policies and strategies

1.9 Aside from the oil and gas sector, employment in Shetland covers a number of growth sectors supported by HIE's long-term strategy and current Operating Plan priorities. These include fisheries and aquaculture (as part of Food and drink), Renewable energy, Sustainable tourism, and Creative industries, all of which are seen as important to pursuing the regional goal of economic diversification, ownership and sustainability. Public administration and health and education are also important sectors within the area. Life sciences and Financial and business services[3] are becoming increasingly important also.

1.10 The Economic Development Policy Statement for 2013-2017[4], developed by Shetland Islands Council, aims *"to improve the economic well-being of Shetland by promoting an environment in which newer industries develop alongside thriving traditional industries."*[5] The policy statement's objectives were in line with the national Strategic Priorities from the Scottish Government Economic Strategy of 2011, namely: a supportive business environment; transition to a low carbon economy; learning skills and well-being; infrastructure development and place; effective government; and equity. Most of these priorities are being taken forward in the new Scottish Economic Strategy 2015, where they have been consolidated into four streamlined categories: investment, innovation, inclusive growth, and internationalisation.[6]

1.11 The Shetland Islands' Economic Development Service have a number of reports containing recommendations to enhance Shetland's brand identity and marketability, and to improve its Seafood, Tourism, Renewable energy and Textile industries[7].

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[2] Highlands and Islands Enterprise (2014) *Young People in the Highlands and Islands: Socio-economic Profile.* May 2014, p.18
[3] Shetland Islands Council, 2013
http://www.shetland.gov.uk/economic_development/documents/ShetlandInStatistics2013.pdf
[4]Shetlands Islands Council, Economic Development Policy Statement 2013-2017
http://www.shetland.gov.uk/economic_development/documents/EconomicDevelopmentPolicyStatement201317FINAL.pdf
[5]Shetlands Islands Council, Economic Development Policy Statement 2013-2017, page 16
[6] The Scottish Government (2015) *Scotland's Economic Strategy,* p.36.
http://www.gov.scot/Resource/0047/00472389.pdf
[7] Shetland Islands Council. Research Surveys and Strategies
http://www.shetland.gov.uk/economic_development/ResearchSurveysandStrategies.asp

1.12 The Community Planning Partnership's Single Outcome Agreement (SOA) is the framework that Shetland has adopted to assess the outcomes of its Economic Development Policy Statement for 2013-2017.[8] One of the key SOA outcomes of particular relevance to young people focuses on ensuring that Shetland is the best place in Scotland for children and young people to grow up.[9] In terms of Shetland's Community Plan, one of the Key Priorities is to develop a 5 year plan to attract people to the Shetland Islands to live, work, study and invest.

1.13 At a regional level, the Highlands and Islands Regional Skills Investment Plan[10] (RSIP), developed by Skills Development Scotland (SDS), identifies skills challenges. It cites the greatest challenge for the H&I as the retention and attraction of working age people. Out-migration is also identified as a major skills challenge, with net out-migration evident for all ages from 15-39. The plan identifies growth opportunities for the region, including Energy and the Creative industries.

Key Investments

1.14 HIE, Shetland Islands Council, and other partners are responding to the opportunities and challenges in Shetland through key investments. For example, there has been significant investment to secure Shetland as a Global Decommissioning Centre of Excellence. During 2014/15 HIE approved £1.195 million to Lerwick Port Authority (LPA) (including £324,416 from ERDF) towards an £11.95 million investment to strengthen and develop quayside infrastructure at Dales Voe South in Lerwick. In addition, HIE approved £628,000 to Peterson (UK) Ltd towards its "Deep Water Shetland" project to further expand its decommissioning capability at Lerwick Port. The projects are complementary and will secure Shetland's place as a globally significant decommissioning centre of excellence in future. The facility will be the only one of its kind in Scotland, placing the Shetland Islands at the international forefront of an emerging sector worth £30-40 billion from North Sea activities. Both projects will support the creation of 120 jobs in Shetland and mainland Scotland.

1.15 Other investments include the Mareel Creative Industries and Media Centre, a £12m project funded by HIE, Scottish Arts Council, Shetland Islands Council, Shetland Development Trust and others, which is designed to bring more than 50 new jobs to Shetland. Some of these will undoubtedly be taken up by young people, and the centre will also serve as a hub to develop and promote H&I creativity and cultural activity nationally and internationally[11]. Additional investments include those to support specific key local employers, such as those in the textile sector, to enable it to increase output and do more business abroad.

1.16 Wide-scale infrastructure investments, such as the Next Generation Broadband Access (NGA) roll-out are also helping to address challenges in the area. Further, oil and gas production prospects in the North Sea have attracted substantial investments (billions of pounds) to the environs of the Shetland Islands from major oil companies such as BP, Royal Dutch Shell, Total[12] and EnQuest[13]. These have created many jobs in Shetland, although not all of these will be long-term. Policy responses and investments have sought to create a more balanced and diversified economy, and to support local entrepreneurs and start-up business.

[8] Shetlands Islands Council, Economic Development Policy Statement 2013-2017 (p.9-10)
[9] Shetland Partnership (2013) Shetland Partnership Single Outcome Agreement 2013
[10] SDS (2014) Highlands and Islands Skills Investment Plan
[11] http://www.hie.co.uk/regional-information/area-information/shetland/projects/mareel-creative-industries-centre.html
[12] http://www.heraldscotland.com/business/company-news/bp-eyes-major-new-shetland-investment.22922496
[13] http://www.bbc.co.uk/news/uk-scotland-north-east-orkney-shetland-24954495

1.17 The University of the Highlands and Island's (UHI) Shetland College, the archipelago's principal institute of higher learning, will continue to support local industry with research, innovation, and overall skills development in line with community, regional and national priorities.[14]

[14] Shetland College UHI *Strategic Plan, 2011-2016*, p. 7.http://www.shetland.uhi.ac.uk/about-us/publications/StrategicPlan201116.pdf

2 Staying and Leaving

2.1 This section of the report considers whether respondents are likely to stay in or leave the H&I (and whether this is out of choice or out of necessity, real or perceived), and how respondents view the choices of others.

Self-identification

2.2 Young people in Shetland are more likely to want to stay in their local area, or to leave reluctantly, than is the case across the H&I as a whole. In all, more than half regard themselves as **committed stayers** (55%) compared to 43% for the H&I as a whole. The proportion of **reluctant leavers** in Shetland is 18% compared to 13% across the wider region. Conversely, just under a quarter of the young people in Shetland (24%) describe themselves as **committed leavers**, which contrasts with 40% across the H&I, a difference of 16 percentage points.

Table 2.1

Which of the following best describes you? *Expressed in terms of % of total excluding potential returners, new residents and none of the above*	**Shetland (n=120)**	**Highlands & Islands (n=3,607)**
	%	%
Committed stayer*: I live in the H&I and I plan on living and working here*	55	43
Reluctant stayer*: I live in the H&I; I would prefer to leave but I don't think I will be able to*	3	5
Reluctant leaver*: I live in the H&I; I would prefer to stay but I don't think I will be able to live and work here*	18	13
Committed leaver*: I live in the H&I, but I plan to leave, and live and work elsewhere*	24	40

Geographic variations

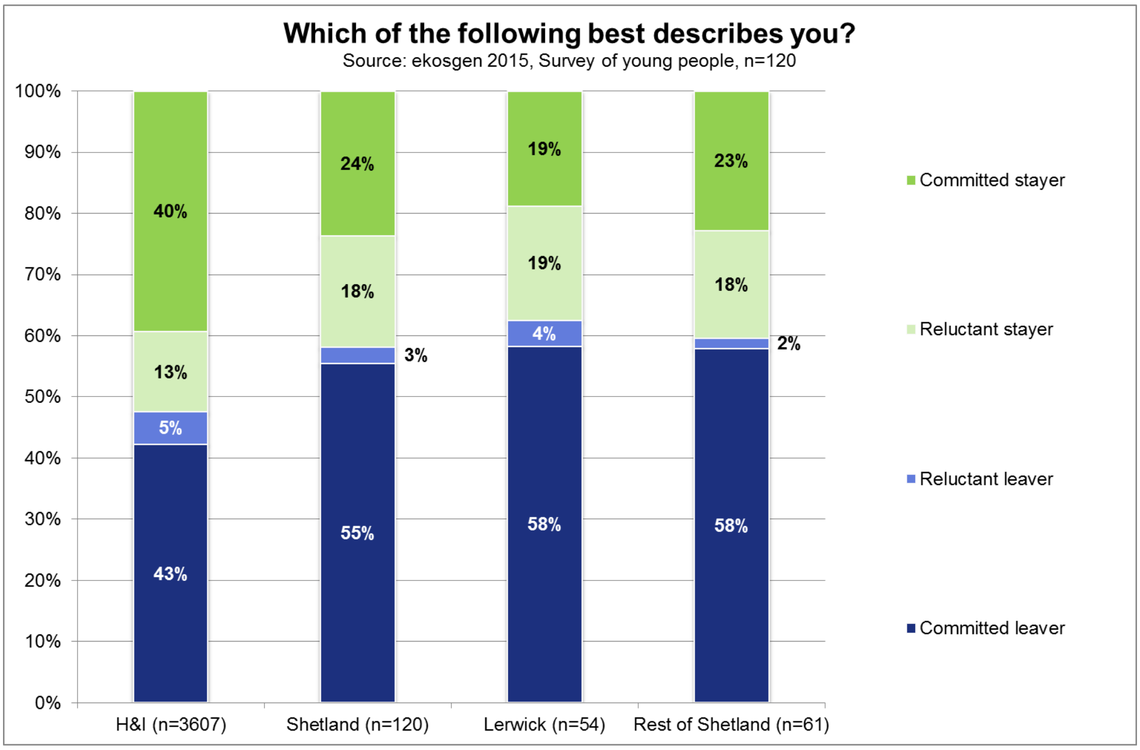
2.3 Respondents from Lerwick are slightly less likely to identify as committed leavers – around 19% do so compared to 23% of those living elsewhere in Shetland, although both are far lower than the regional average. Lerwick has a slightly greater proportion of reluctant stayers (4%, compared to 2% for elsewhere in Shetland).

Variation by age and status

2.4 As with the H&I region overall, those aged 15-18 in Shetland are most likely to identify as committed leavers (35%), though this proportion is considerably lower than for the region as a whole (52%). Outwith Lerwick, it is the 25-30 age group that are most likely to do so (36%), which may be linked to views on employment opportunities (see Chapter 4). In contrast, the overwhelming majority of 25-30 year-olds in Lerwick (91%) identify themselves as committed stayers. For those living elsewhere in Shetland it is the 19-24 year-olds who are most likely to be committed stayers (88%).

2.5 School pupils are far more likely to want to stay in their local area than is the case across the H&I. Two in five of Shetland's school pupils are committed stayers (40%) compared to just over a fifth (23%) across the H&I. Correspondingly, a lower proportion identify themselves as committed leavers (37% versus 56%).

Figure 2.1



Perceptions of stayers and leavers

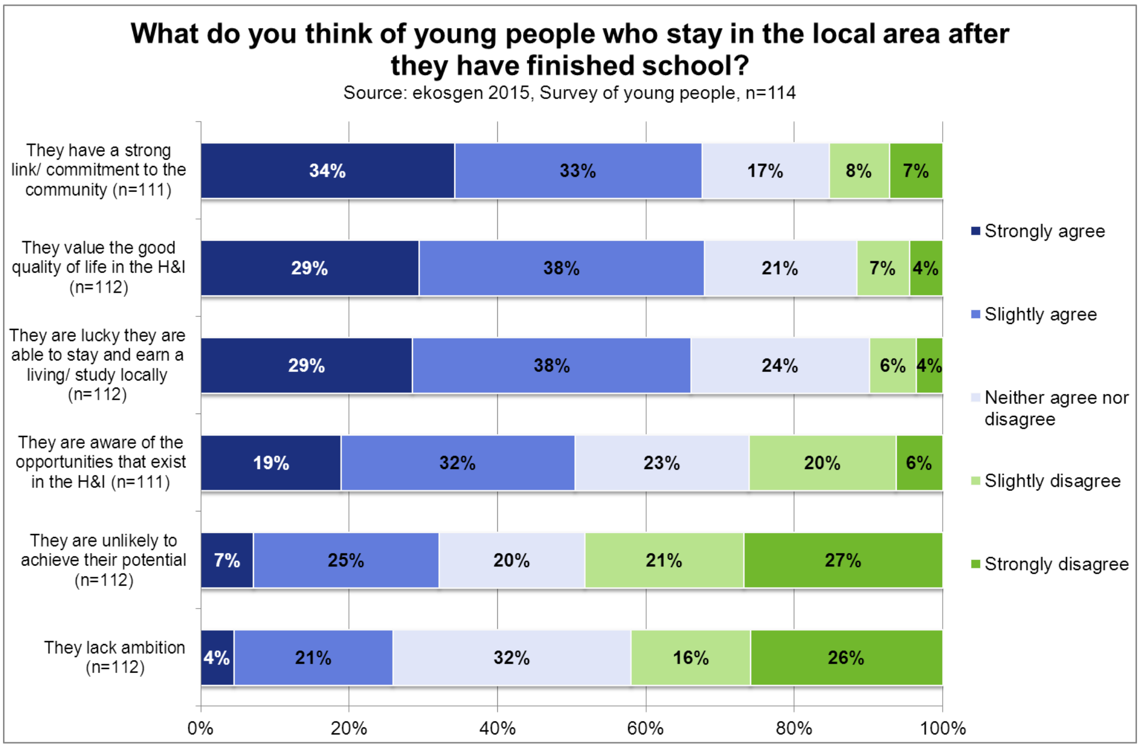
Views on those who stay

2.6 More than two thirds (67%) of young people in Shetland consider that those who stay in the local area following school have a strong commitment to the local community. This compares to 54% in the H&I. The same proportion, two thirds, also think that those who stay value the good quality of life in the H&I, and that they are lucky to be able to stay and earn a living or study locally. This is nine and five percentage points higher than corresponding H&I figures, and indicative of a stronger positive view of other young people who choose to stay in the local area after finishing school.

2.7 These positive perceptions of others' decisions to stay are even higher in areas outwith Lerwick. For instance, 71% consider stayers to be lucky to be able to do so, and 81% think that they value the good quality of life.

2.8 Negative perceptions of the decision to stay are also lower in Shetland than elsewhere. Around a quarter of young people (25%) think that stayers lack ambition, compared to 34% regionally, whilst just under a third (32%) think that they limit their potential by staying, as opposed to 39% throughout the H&I region. Again, negative perceptions are lower among those from outwith Lerwick.

Figure 2.2

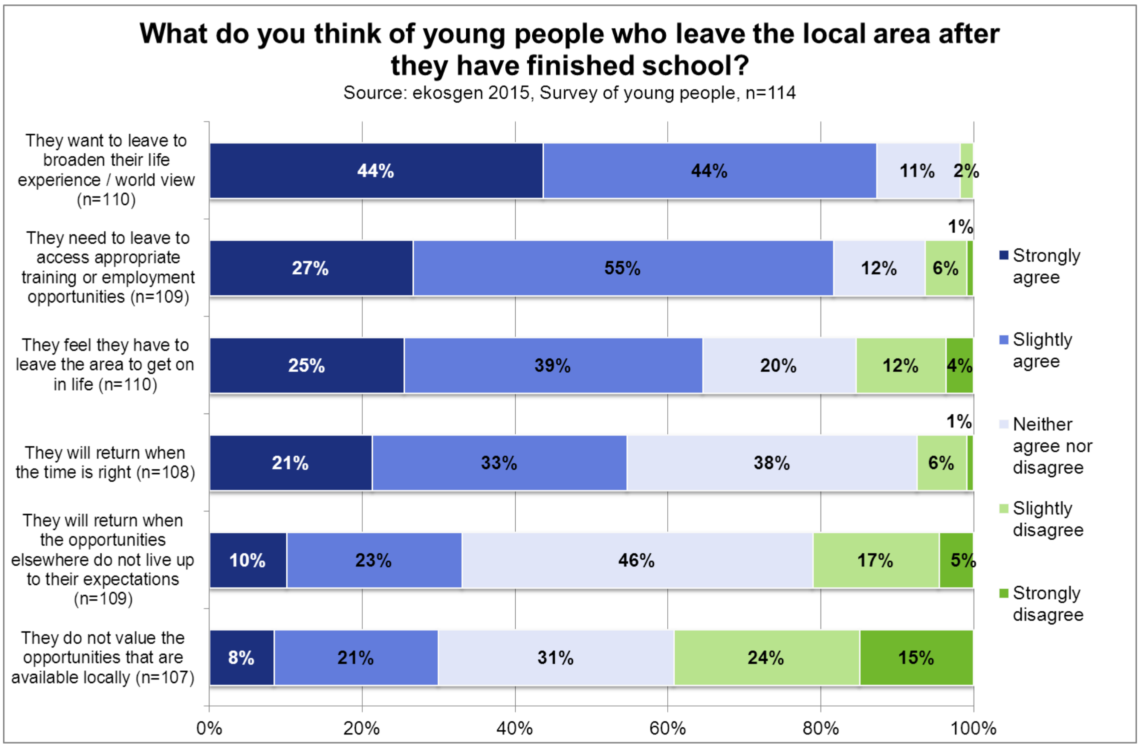


Views on those who leave

2.9 In all, 88% of young people in Shetland agree that leavers wish to do so to broaden their world view, in line with the regional average (87%). Around eight in 10 (82%) think that leavers do so to access appropriate training or employment opportunities, slightly higher than the H&I average (78%). Just over half (54%) consider that leavers will return when the time is right, although this is slightly lower than the 56% across the H&I.

2.10 A lower proportion of those in Shetland feel that young people leave in order to get on in life (64%), than those across the H&I as a whole (71%). This is higher for those living in Lerwick (75%) but lower for those living elsewhere in Shetland (54%).

Figure 2.3

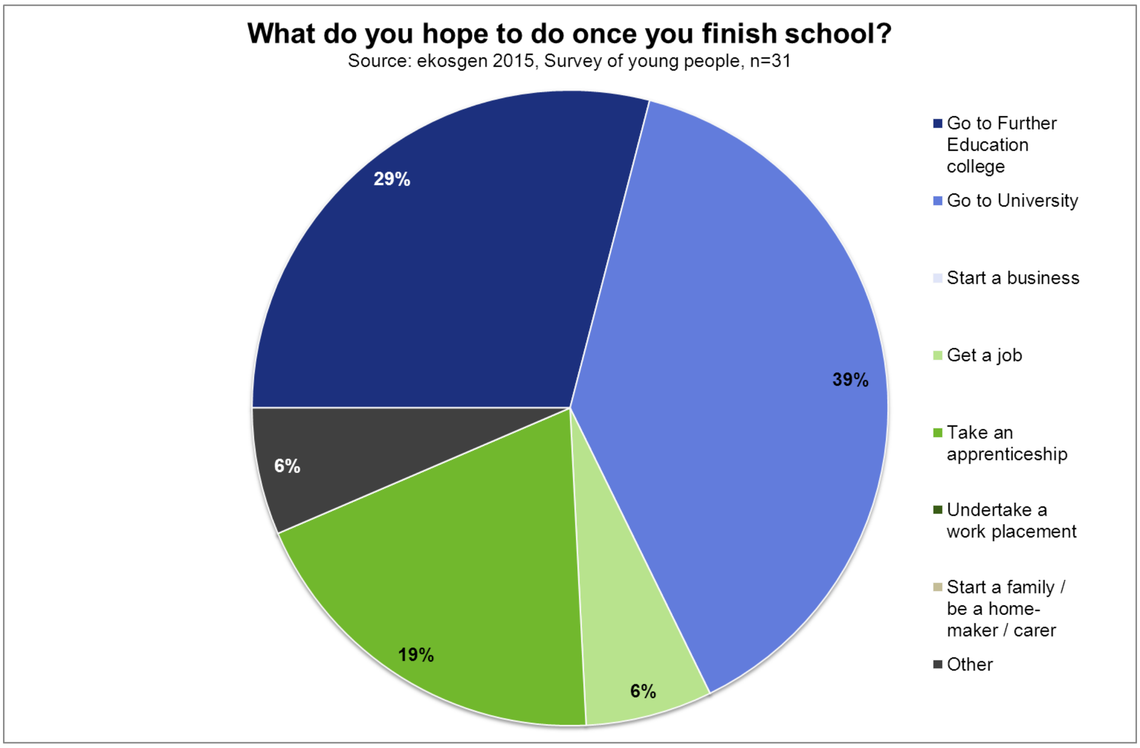


Aspirations of school leavers

2.11 Over two thirds of school pupils in Shetland (68%) wish to go to university or undertake further education after leaving school, slightly lower than for the H&I overall (72%). Most wish to attend university.

2.12 In Lerwick itself, eight in 10 wish to go to university (50%) or undertake further education (30%) compared with just over half (22% and 33%) of those elsewhere in Shetland. However, 28% of those outwith Lerwick wish to undertake an apprenticeship (and this is only 19% for Shetland in total).

Figure 2.4



2.13 Across Shetland as a whole, the most popular destinations for post-school activity are locally (29%) and elsewhere in Scotland (23%). For the latter this is comparable with the regional average (22%), but more young people wish to stay locally than in the H&I (14%). Outwith Lerwick, the proportion of those wishing to stay locally rises significantly by 12 percentage points to 41%. Notably, in Shetland, males are much more likely to want to stay locally – 47% wish to do so, compared with just 7% of females, likely to be linked to the nature of employment opportunities in the male-dominated oil and gas and related sectors.

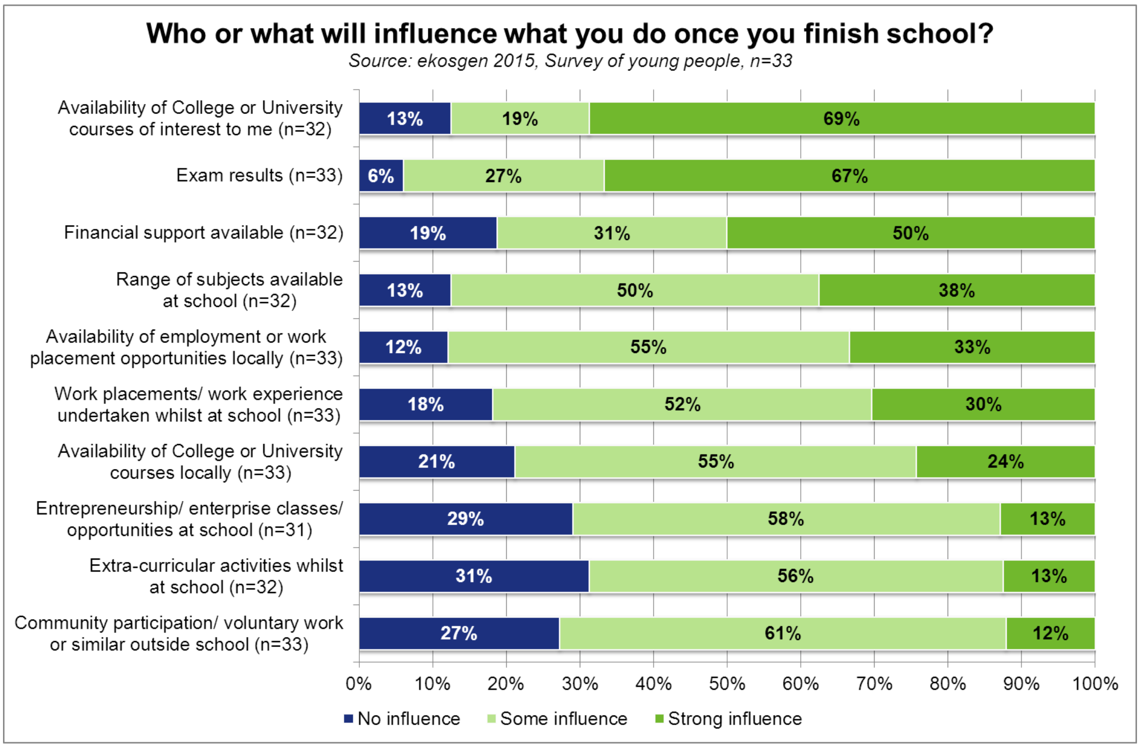
Factors influencing decisions after leaving school

2.14 Factors that may influence post-school decisions generally have a stronger influence for young people in Shetland than for the H&I as a whole and this was consistent across all those listed. Most (88%) consider that interesting college or university courses would have at least some influence, with 69% stating that this would be strongly influential. Similarly, 94% stated (67% strongly so) that exam results would be influential. In both instances, the proportion agreeing that this would be strongly influential was considerably more than for the H&I. The range of subjects available at school, in particular, was deemed to have a stronger influence by respondents in Shetland (88% compared with 80%, and more strongly so – 38% versus 33%) than in the H&I as a whole.

2.15 Work experience, and local work placements emerged as more influential than for the H&I as a whole, the proportion considering them to be strongly influential was around four percentage points higher than regionally.

2.16 When compared with Shetland as a whole, the percentage citing factors as strongly influential was consistently higher among respondents living outwith Lerwick. In particular, those living outwith Lerwick were more *strongly* influenced by the financial support available (61% compared to 20%), the range of subjects at school (44% compared to 30%) and the availability of employment or work experience locally (42% compared to 30%) than those from Lerwick, when deciding what to do after school.

Figure 2.5



3 Learning in Shetland

3.1 This chapter explores attitudes and aspirations evident in Shetland in relation to learning; covering Further Education (FE) and Higher Education (HE), and related matters such as graduate placements and the opportunities presented in terms of routes into employment from FE and HE.

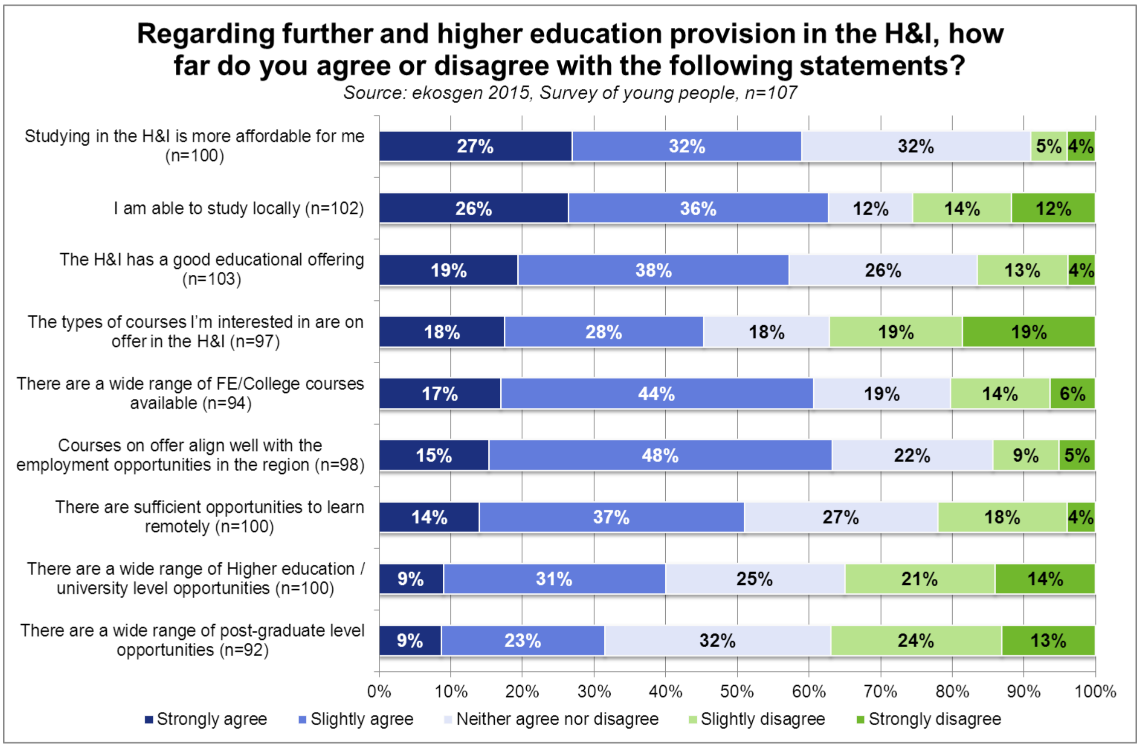
Further and higher education provision

3.2 Young people in Shetland consider there to be a good educational offering in the H&I. In all, 57% think so, in line with the regional average. There is particularly good feedback on the range of FE/college courses available (61%, higher than the 54% regionally), and 62% feel they are able to study locally, compared to 57% across the H&I. Further, some 63% think that the educational offer is well aligned to employment opportunities, a full ten percentage points higher than the H&I average of 53%. More also consider there to be courses of interest on offer (46% rather than 40% regionally).

3.3 Cost is slightly more of an issue, however, with 59% considering studying in the H&I to be affordable, against 61% across the region. HE is viewed less favourably, with fewer young people agreeing that there is a good range of HE/university level opportunities (40%), lower than the 45% across the H&I).

3.4 Whilst over a third (35%) disagree that there is a wide range of HE/University level opportunities, this rises to half (50%) for those in Lerwick, where half (50%) also disagree that what is on offer is interesting to them. Outwith Lerwick, the proportion disagreeing falls to 24% and 28% respectively.

Figure 3.1



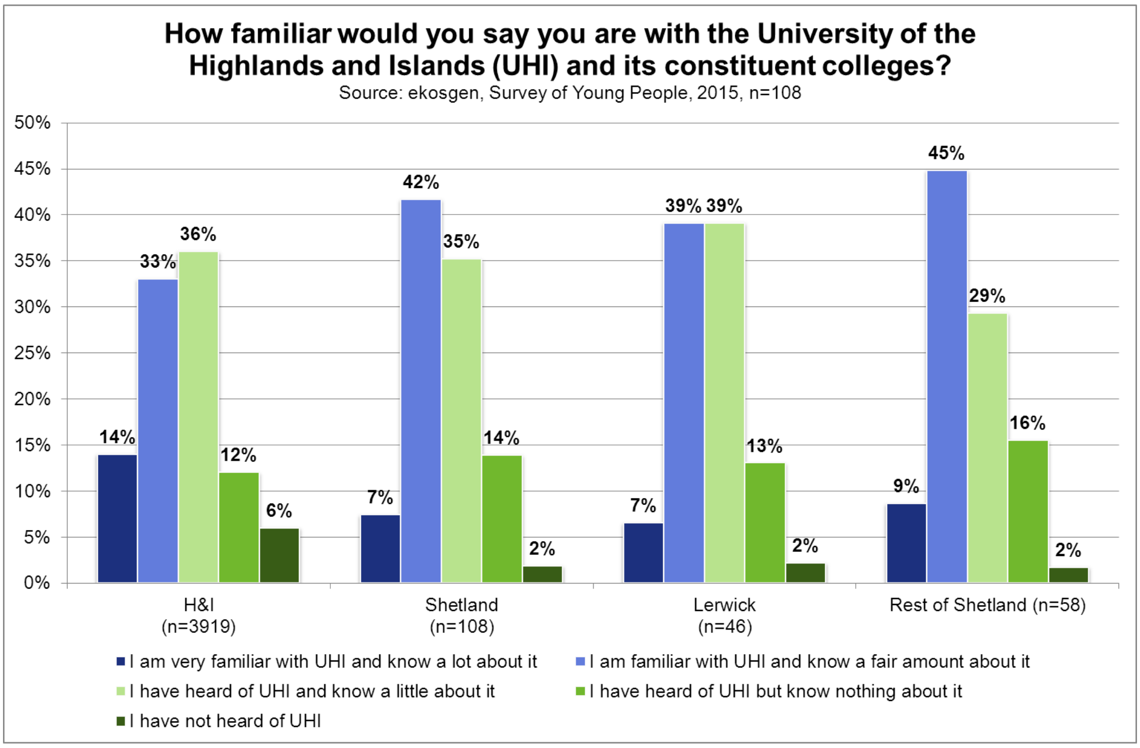
3.5 Young people aged 15-18 are more likely to *strongly* agree with assertions on the educational offering, though in many instances – such as on the range of opportunities available – there are fewer agreements overall. Contrasting with this, those at college / university age (19-24 years) and those that are currently students, are more likely to agree that the range of courses available is good, particularly for FE courses (77%); additionally 75% of students agree that they are able to study locally and that it is affordable.

3.6 Over half the young respondents in Lerwick (56%) consider themselves able to study locally, which is similar to the H&I overall (57%) but lower than for those living elsewhere in Shetland (70%). This could be a result of a perceived limited choice of courses (as discussed above with reference to the range of HE opportunities). Those in Lerwick are less likely to consider themselves able to learn remotely – only 44% do so, compared to 57% outside of Lerwick, more than do so regionally (49%). Further, almost two-thirds of current students also consider that they are able to learn remotely.

Awareness of UHI and its offer

3.7 There is good awareness of UHI amongst young people across the H&I. This extends to those in Shetland: 84% know at least a little about UHI, a very similar proportion to the H&I overall (82%). That said, fewer say they know *a lot* about UHI. Awareness is strongest amongst those outwith Lerwick, where more than half (54%) know at least a fair amount about UHI, eight percentage points higher than those in Lerwick (46%). Awareness of UHI, in general, is highest amongst students (100% know at least a little about UHI) and those aged 19-24 (97%).

Figure 3.2



3.8 UHI is seen as a good place to be a mature student (80% of respondents think this is the case compared to 64% for the H&I), and this rises to 91% for those living outwith Lerwick.

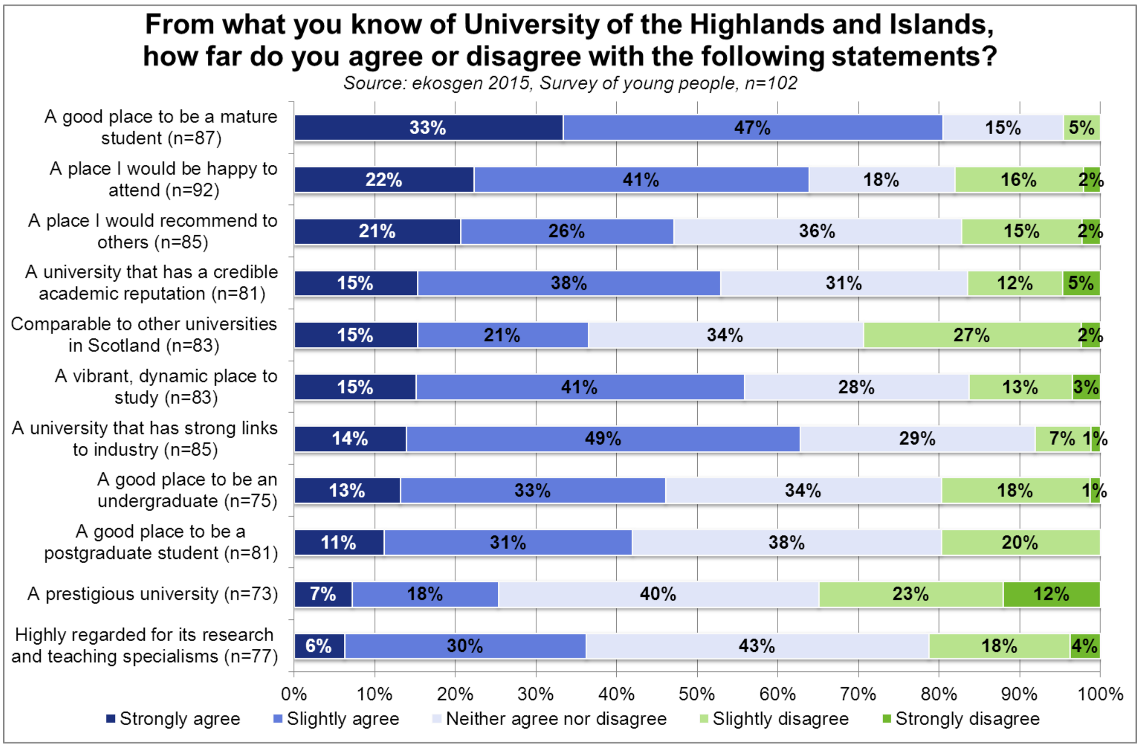
3.9 Fewer respondents see UHI as a good place to be an *undergraduate* student, and the proportion is slightly lower amongst those in Shetland (48%) than across the H&I as a whole

(46%). A similar proportion of young people rate its suitability for postgraduate study. Two-thirds of *students* strongly agree that it is good for undergraduate study, but only two-fifths of school pupils think so compared to almost half for the region as a whole.

3.10 More young people in Shetland (53%) think UHI has a credible academic reputation than the regional average (42%), rising to 71% outwith Lerwick. Over a third (36%) consider it comparable to other universities in Scotland.

3.11 Overall, 63% of young people in Shetland would be happy to attend UHI, compared to 57% across the H&I. For students this rises to 77%, and for 19-24 year-olds to 83%. In all, 56% of school pupils would be happy to attend UHI, which compares to 50% regionally. More than three in four (76%) of those living outwith Lerwick would be happy to attend UHI.

Figure 3.3



Inverness Campus

3.12 Inverness Campus, which will see Inverness College UHI co-located with centres for business and research, opened in May 2015. Whilst 25% in Shetland are aware of the Inverness Campus, 75% are not. This contrasts with the situation across the H&I, where almost six in 10 know something of the Campus, although it is worth noting that across the region this awareness rises significantly the closer the young person lives to Inverness.

3.13 This relative lack of knowledge of Inverness Campus is reflected in views on the Campus. Whilst 46% think it offers a city university experience for the region, only a quarter think it would help career aspirations (compared to 46% across the region). Further, nearly three-quarters neither agreed nor disagreed on whether they would recommend it to others.

Graduate placements

3.14 Whilst more than half (51%) consider that undertaking a graduate placement would improve their chances of securing employment in the region, fewer consider that there are a wide range of placement opportunities (30%), and that there are sufficient placement opportunities in more rural areas (26%). These are similar proportions to regionally. However, it is worth noting that almost 30% did not know whether there were sufficient opportunities available.

3.15 Awareness of the ScotGrad programme is also lower than across the H&I. The ScotGrad programme provides graduate and summer placements, and is designed to support business innovation, knowledge transfer and growth in the Highlands and Islands by assisting graduates with their career progression, and encouraging young people to stay in the Highlands and Islands. It aims to help overcome market failures around graduate recruitment and innovation, which tend to be particularly severe in remote rural areas. In all, 86% of respondents in Shetland are unaware of the ScotGrad programme, higher than the 79% across the H&I.

4 Working in Shetland

4.1 This section identifies what young people in Shetland think about local employment and career progression opportunities, their ideal location to work, familiarity with and interest in H&I growth sectors, and characteristics valued most in employers. Again it seeks to draw out sub-area variations where these exist.

Employment-Related Factors in the Local Area

Apprenticeships

4.2 Opportunities for apprenticeships are viewed more positively by young people in Shetland than elsewhere in the H&I. Some seven in ten (69%) regard the opportunities as quite (39%) or very good (30%), compared to 49% across the H&I. Opportunities are viewed most positively in Lerwick (82% stating they are quite or very good), and slightly less so outwith Lerwick (62%), although this is still 13 percentage points higher than the H&I overall. Those aged 15-18 are the most positive age group, with 74% rating apprenticeship opportunities as quite or very good, rising to 80% for school pupils.

Local Employment Opportunities

4.3 Nearly twice as many young people in Shetland view local employment opportunities as quite or very good (64%) than across the H&I overall (35%). This is especially true in Lerwick (70%), though it falls slightly for those living outwith (60%). Respondents tend to become more positive about local employment opportunities as they get older, with 70% of those aged 25-30 rating these positively, compared to 60% aged 19-24. Encouragingly, 64% of those aged 15-18 perceive there to be good local opportunities, which compares to 36% for this age group across the region. Male respondents are more positive than females, with 75% of males perceiving local employment opportunities as good, compared to 59% of females. None of the males responding viewed local employment opportunities as poor.[15]

Pay Levels

4.4 Young people in Shetland are positive about pay levels, with 57% seeing these as quite or very good, twice the proportion across the H&I overall (27%). This is higher for those living outwith Lerwick (62%) than in Lerwick itself (54%), and may again be due to the oil and gas sector effect which is typically relatively better paid than average. Those aged 19-30 years are slightly more likely to view pay levels as good compared to the 15-18 age group (59% compared to 55%).

Opportunities for Personal Development and Career Progression Locally

4.5 Young people in Shetland were also more positive than elsewhere in the H&I about local opportunities for personal development and career progression. In all, just over 45% rate opportunities for personal development locally as quite or very good (compared with 37% for the H&I) and almost four in ten are positive about opportunities for local career progression (38%), compared with 29% overall.

4.6 Optimism in relation to career progression opportunities reduces with age, with 43% of 15-18 year olds rating them as good, compared to 38% amongst 19-24 year olds and 30% of

[15] Please note, as elsewhere in the analysis, due to the small absolute numbers (32 males and 58 females responding to this question), these results cannot be seen to be wholly representative, but instead provide a flavour of young people's views in Shetland, analysed by age.

25-30 year olds. Similarly, whilst 55% of school pupils rate these progression opportunities as quite or very good, just 27% of those in employment/ self-employment do so. Overall, only 5% regard local career progression opportunities as very good.

Self-Employment Opportunities

4.7 Fewer consider opportunities for self-employment in Shetland as good compared to the overall level of employment opportunities, although at 43% this is still higher than the regional average (39%).

4.8 Young people in Lerwick are less positive about self-employment opportunities (38%) than those outwith Lerwick (48%). Respondents aged 19-24 are particularly negative, with just 25% rating these opportunities as quite or very good, compared to 48% of those aged 25-30 and 55% of those aged 15-18.[16]

Diversity of Employment Opportunities

4.9 Despite favourable ratings about the overall level of employment opportunities in the local area, young people in Shetland are far less positive about the *diversity* of local employment opportunities. Of all the employment-related factors, diversity of employment is viewed least positively, with just 28% describing this as quite or very good, in line with the regional average of 29%. Those in Lerwick perceive this to be a greater issue, with 38% rating these as quite/ very poor, compared to those outwith Lerwick, where just 17% do so.

4.10 School pupils in Shetland are more positive about the diversity of employment opportunities (36% rate these positively), while university/ college students are least positive, with just 19% rating these opportunities as good.

4.11 Male respondents are again more positive than females, with 38% perceiving the diversity of employment opportunities as good (and 16% viewing these as poor), compared to 22% of females (with 36% describing these as poor).[17]

[16] As elsewhere in the analysis, these results must be treated with some caution due to the relatively small absolute numbers when breaking the responses down by age and status.

[17] Please note, as elsewhere in the analysis, due to the small absolute numbers (32 males and 58 females responding to this question), these results cannot be seen to be wholly representative, but instead provide a flavour of young people's views in Shetland, analysed by age.

Figure 4.1

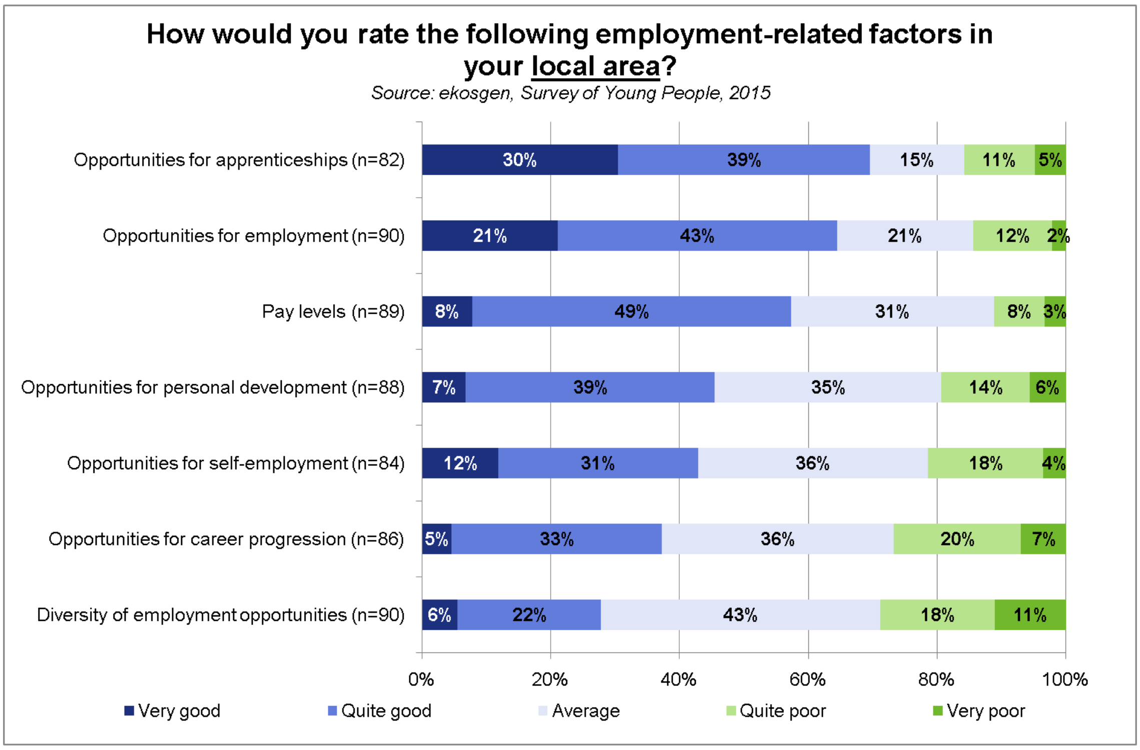
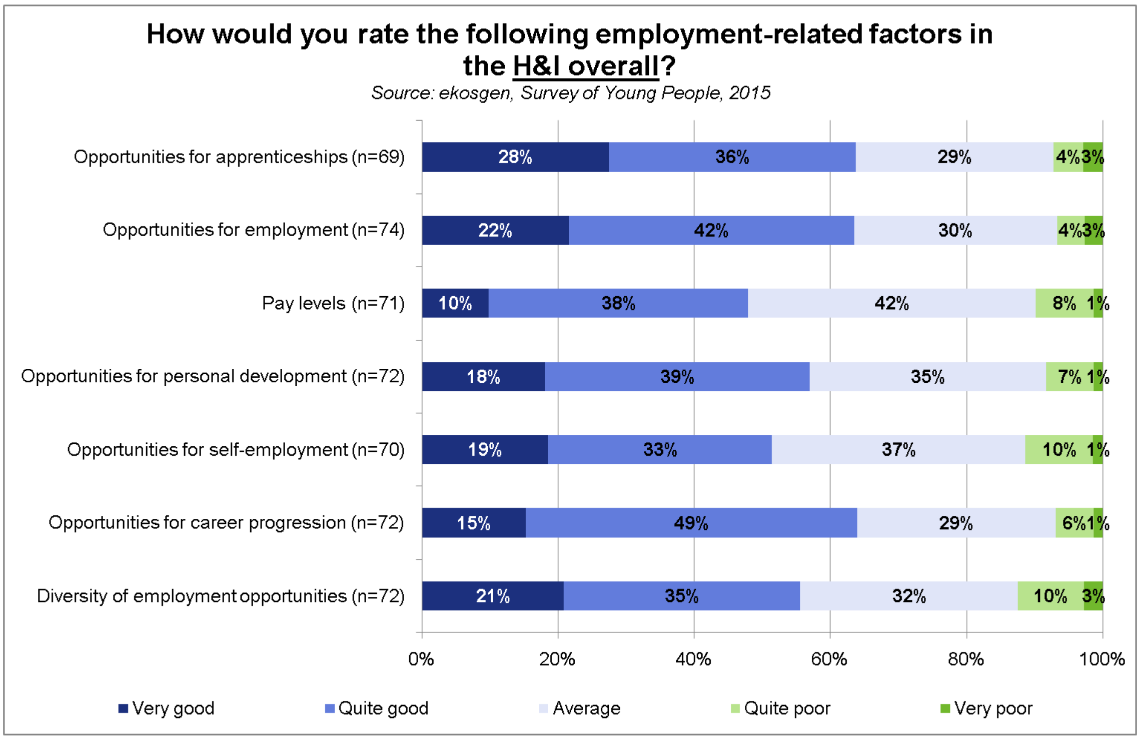


Figure 4.2



Employment Related-Factors in the H&I

4.12 Young people in Shetland generally rate opportunities for apprenticeships in their local area more positively than they do for the H&I overall (69% compared to 64%) and this is also the case for pay levels (57% compared to 48%), as shown in Figure 4.2. This is in contrast to the rest of the H&I where the level of regional opportunity tends to be viewed more favourably than the level of local opportunity. This reflects the perceptions of good local opportunities identified in the preceding section.

4.13 In contrast, respondents viewed a number of employment-related factors less favourably in their local area than across the H&I region as a whole. These relate to good opportunities for personal development (57% across the H&I versus 46% saying there are good local opportunities) and in particular career progression opportunities (64% saying these are good across the H&I and 38% saying this is the case locally). Perhaps most significantly, twice the proportion of young people in Shetland consider there to be diversity of opportunity across the H&I (56%) than think this is the case locally (28%).

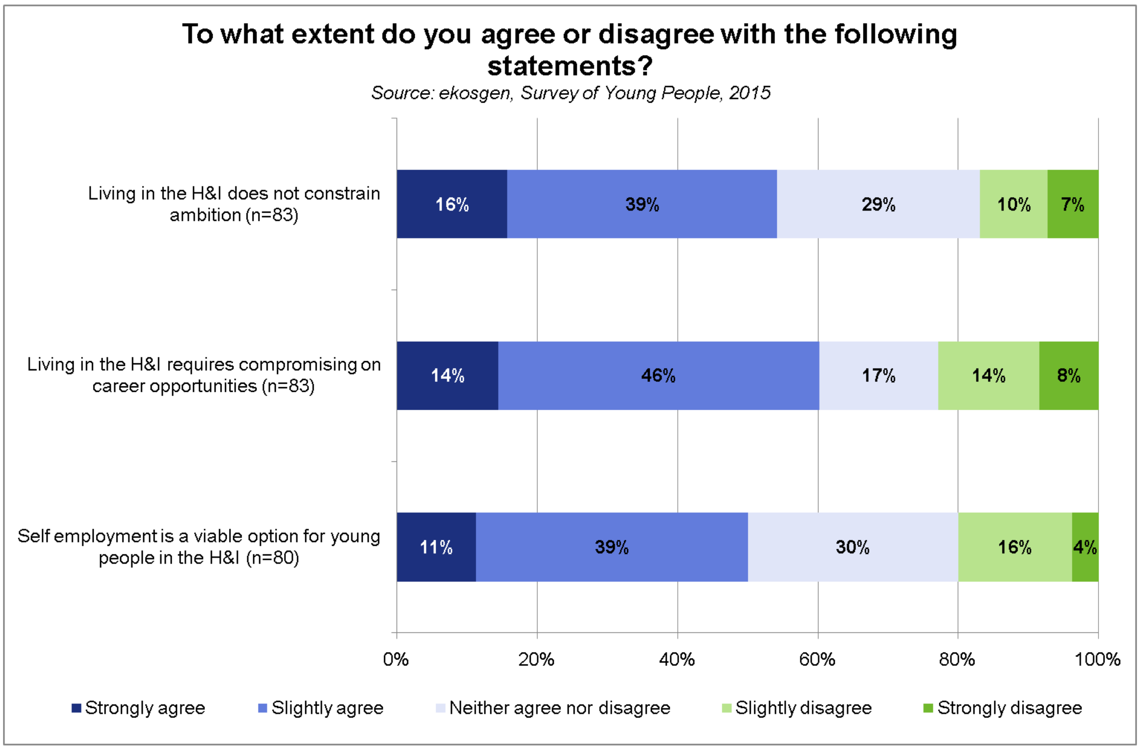
4.14 This suggests that while young people in Shetland are positive about the number of local employment and apprenticeship opportunities available, and the associated pay levels, they perceive there to be better opportunities for career progression/personal development and a wider diversity of jobs and opportunities for self-employment elsewhere in the H&I.

4.15 In all, 60% of young people in Shetland either strongly (14%) or slightly (46%) agree that living in the H&I requires compromising on career opportunities, in line with the regional average. Those in Lerwick are slightly more likely to think this is the case when compared to those living outwith Lerwick (63% versus 56%). Younger people are also more inclined to agree with this statement, with 68% of 15-18 year olds agreeing, rising to 70% amongst school pupils – compared to 56% for both groups regionally.

4.16 Half of young people in Shetland consider self-employment to be a viable option in the H&I, above the regional average of 46%. This is significantly higher for those living outwith Lerwick (65%) than in the main town itself (34%). Almost three in four school pupils agree (74%), compared to just 40% of university / college students.

4.17 Over half the young people in Shetland (55%) feel that living in the H&I does not constrain ambition, compared with 39% overall. Those living outwith Lerwick (70%) are more positive than those resident in the main town (39%).

Figure 4.3



Ideal place to work

4.18 Overall, nearly two thirds (63%) of young people in Shetland would ideally like to work in the H&I, which is much higher than the 44% for the region overall. Of the 63%, the majority (44%) wish to work locally and 19% elsewhere in the H&I. This reinforces the strong commitment to stay locally identified in Chapter 2.

4.19 In all, 15% would like to work in Scotland but outside the H&I (5% in the Central Belt, 2% in Aberdeen and 8% elsewhere in Scotland). Just 8% would like to live elsewhere in the UK (broadly comparable to the proportion region-wide) and 10% would like to work elsewhere in the world (compared to 20% across the H&I).

4.20 Table 4.1 shows where young people would ideally like to work by sub-area. Those outside of Lerwick have an even stronger connection to their local area, with 50% ideally wanting to work locally, while 39% of those in Lerwick would like to do so.

Table 4.1: Desired Place to Work by Sub-Area

	Shetland (n=91)	Lerwick (n=41)	Outwith Lerwick (n=48)
Local area*	44%	39%	50%
Somewhere in the H&I	19%	17%	21%
Central Belt	5%	10%	2%
Aberdeen	2%	0%	4%
Elsewhere in Scotland	8%	7%	6%
Elsewhere in the UK	8%	10%	6%
Elsewhere in the world	10%	10%	8%
Other	4%	7%	2%

*Source: ekosgen, Survey of Young People, 2015; * current home town/village*
Please note, percentages may not sum due to rounding.

4.21 Those in employment or self-employment are most likely to want to work locally (64%) or elsewhere in the Highlands and Islands (9%). School pupils are the least likely to want to do so (31% and 23% respectively), and they are most likely to want to work elsewhere in the UK or elsewhere in the world (12% and 19% respectively). This pattern is typical of the responses across the H&I (though slightly less pronounced), with school pupils often being keen to work elsewhere – either temporarily or permanently – when they finish school, while those in employment/ self-employment are those most likely to want to remain in their current location.

4.22 The proportion wanting to work in their home town or somewhere else in the H&I generally increases with age/life stage. Across Shetland, 27% of 15-18 year olds wish to work locally, and 21% somewhere in the H&I; for 19-24 year olds, this is 52% and 23% respectively; and for 25-30 year olds, this is 56% and 11%. This is more pronounced than in the H&I-wide findings.

4.23 Table 4.2 (below) compares the percentage of those wishing to work locally alongside the proportion thinking there is good *diversity* of local employment opportunities to give an indication of perceived supply of diverse jobs versus demand. Far greater proportions wish to work locally than consider there to be a good range of diverse opportunities (a 16 percentage point difference), although this differential disappears if the comparison is good employment opportunities in general. Indeed, 60% of young people living outwith Lerwick think there are good employment opportunities locally compared to 50% wishing to work locally (and 70% versus 39% for Lerwick itself). The message here is that young people can stay and work locally, but this needs to be in the sectors where there are existing opportunities.

Table 4.2

Shetland Islands sub-area	Those ideally liking to work in their local area	Those rating diversity of employment opp's as quite or very good	Percentage point (pp) difference
Lerwick	39%	25%	-14%
Outwith Lerwick	50%	32%	-18%
Overall Shetland Islands average	*44%*	*28%*	*-16%*

Source: ekosgen, Survey of Young People, 2015.

Views on H&I Growth Sectors

4.24 HIE's Operating Plan recognises that the region's natural assets, ambition, skills base and cultural background provide a range of opportunities to develop a vibrant sectoral economy.[18] HIE's growth sectors - *Financial and business services*; *Creative industries (including digital); Sustainable tourism (including hospitality); Food and drink; Life sciences*; and *Energy (including renewable energy)* are aligned to the key sectors identified in the Scotland's Economic Strategy, but with key regional specialisms under each sector.

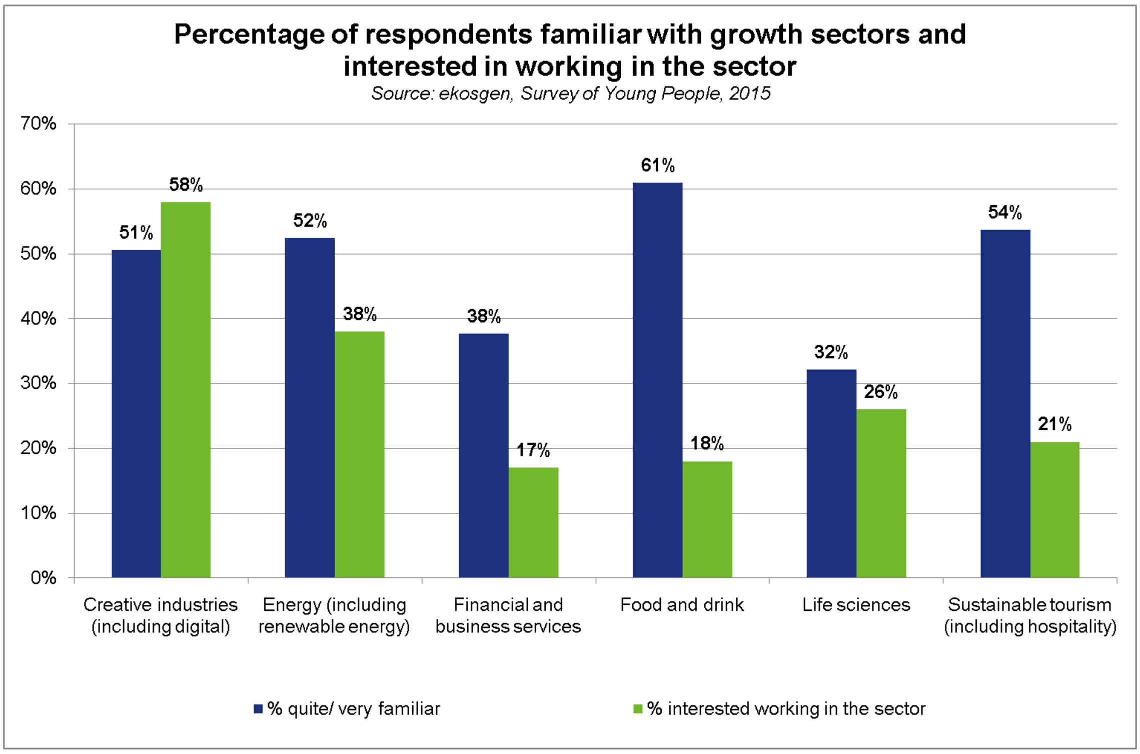
4.25 The most well-known sector in Shetland amongst young people is Food and drink (61%). Awareness of Creative industries is markedly higher than in the rest of the region (51% in Shetland versus 38% overall) and this is also the case for Energy (52% versus 45% overall), in no small way due to the strong presence of these employment sectors locally. The only sectors for which awareness is not above the regional average are Food and drink (61% compared to 62%) and Sustainable tourism (54% versus 60%).

[18] HIE (2014) Building Our Future: Operating Plan 2014-2017

4.26 Creative industries is the most desirable sector for Shetland's young people, with nearly 60% expressing interest in working in the sector (two percentage points above the proportion stating they are familiar with the sector). This is followed by Energy (38%) and Life sciences (26%). Around one fifth are interested in working in Sustainable tourism (21%), Food and drink (18%) or Financial and business services (17%). These lower proportions interested in Sustainable tourism and Food and drink may be due to perceptions that these are lower paid sectors, whilst interest in Financial and business services may be low due to the fact the sector has a limited presence locally.

4.27 Figure 4.4 compares levels of awareness of growth sectors amongst young people in Shetland with interest in working in the sector. The greatest disparities are in Food and drink (61% versus 18%) and Sustainable tourism (54% versus 21%).

Figure 4.4



Desired Qualities in Employers

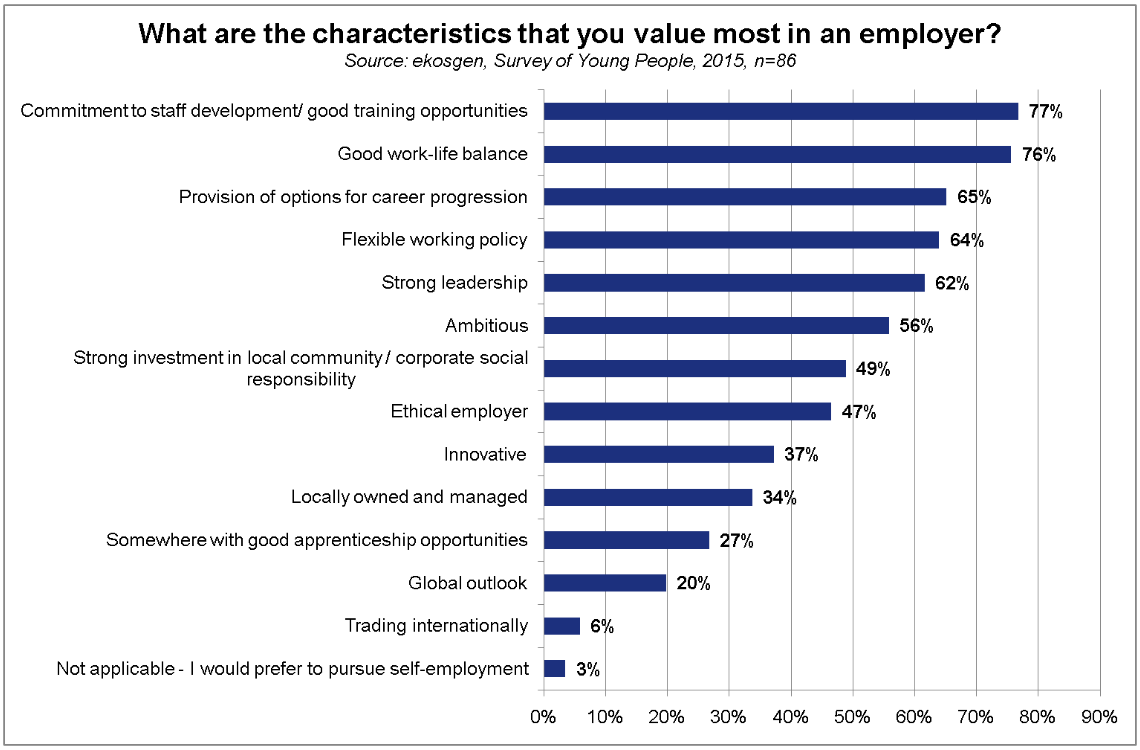
4.28 Views on what Shetland's young people want from employers are broadly comparable to those across the H&I, the most important being a commitment to staff development and training (important to 77% of young people in Shetland and 76% across the H&I). A slightly higher proportion value provision for career progression (65%) compared to the H&I overall (58%), relating back to the perceived lack of local opportunities for career progression discussed earlier in the chapter. As in the H&I overall, young people in Shetland highly value a work-life balance (76%, compared to 74% across the H&I) and flexible working policies (64% compared to 56% overall). Strong leadership (62%) and an ambitious nature (56%) are also seen as important, as is the case across the H&I.

4.29 Ethical business practices are relatively highly valued by young people in Shetland, with 49% valuing a strong investment in the local community/ corporate social responsibility (compared to 44% regionally), 47% an ethical employer (versus 44%), and 34% a locally owned and managed business (compared to 27%).

4.30 In contrast, young people in Shetland are slightly less interested in a global outlook from employers (20% compared to 22% regionally) and in international activities (just 6% compared to 12% regionally).

4.31 Respondents from Lerwick are more likely to value an employer who is committed to staff development and good training opportunities than those living outwith Lerwick (87% versus 69%), those able to provide options for career progression (71% versus 60%) and ambitious employers (63% versus 50%). In contrast, those from elsewhere in Shetland are more likely to value an innovative employer (42% versus 32%), and an employer offering good apprenticeship opportunities (35% versus 16%).

Figure 4.5



5 Life aspirations in Shetland

5.1 There are a range of other factors, beyond education and employment, which affect a young person's decision on whether to stay or leave the Shetland Islands. These include housing, transport, mobile and internet connectivity, arts, leisure and culture and the strength of the local community. This chapter explores these issues and their relative importance. Any significant variations by sub-region within Shetland are outlined in the analysis.

Housing

5.2 As the overall H&I report shows, the lack of available and affordable housing is a significant issue for young people[19] and one that has risen in importance since 2009, relative to other factors. Whilst market conditions mean that housing has likely become an issue for young people more generally, housing availability and affordability are clear concerns for those in the H&I. This is also true for young people in Shetland.

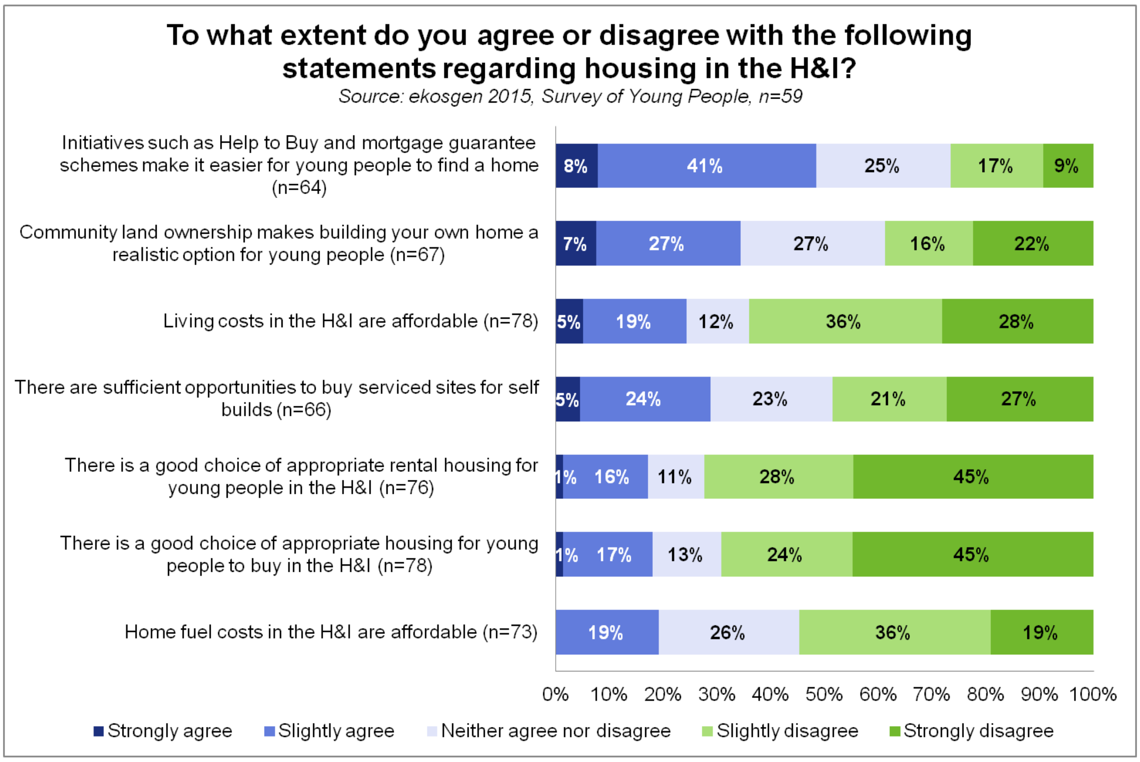
5.3 In terms of housing in the region, the views of young people in Shetland reflect those across the H&I, although they are more pronounced. Just over 18% consider there to be an appropriate choice of housing *to buy* while 69% do not think so, compared to 26% and 57% across the H&I. Similarly, 17% think there is a good choice of appropriate *rental* housing in the H&I, although nearly three quarters (73%) disagree, compared to 29% and 53% regionally.

5.4 The cost of living is a more serious issue for young people in Shetland compared with elsewhere in the region. Less than one in four (24%) believe costs are affordable, compared to 41% across the H&I. 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%.

5.5 Just over a third (34%) of young people in Shetland agree that community land ownership makes building your own home a more realistic option – higher than across the H&I (28%). A slightly smaller proportion (29%) agree that there are sufficient opportunities to buy serviced sites for self-build, again above those from across the H&I (25%).

[19] The Housing questions were only asked to those respondents via the main online survey, i.e. they were not asked in the schools paper and online surveys.

Figure 5.1



Transport

5.6 Transport is a key issue for young people in Shetland, particularly amongst those from Lerwick.

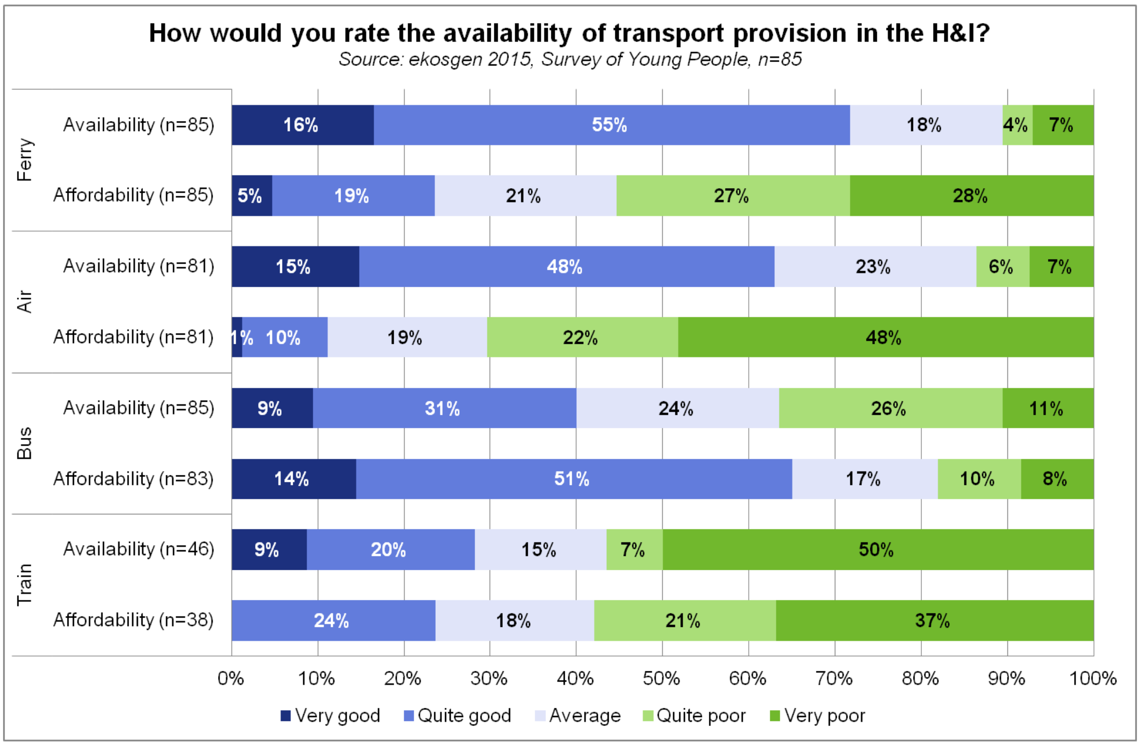
5.7 **Ferry** and **air travel** are the main transport modes connecting the Shetland Islands to mainland Scotland. Ferry availability is rated as good by 71% and air travel availability by 63%. Air travel availability is rated slightly more highly by those from outside Lerwick, perhaps due to Sumburgh, the main airport servicing the island, being located on the southern tip of the mainland, 20 miles south of Lerwick.

5.8 Both modes, however, are deemed unaffordable by young Shetlanders, particularly air travel where seven in ten (70%) think it poor. This was higher in Lerwick than outwith Lerwick. More than half (55%) of young people rate ferry affordability as poor.

5.9 The availability of **bus travel** within Shetland is rated as at least ‘quite good’ by four in ten (40%) young people, in line with the H&I as a whole. Bus travel *affordability* is highly rated, with nearly two thirds (65%) rating it well, far higher than the average for the region (34%)

5.10 **Rail travel** availability and affordability are rated poorly by respondents as Shetland has no railway line.

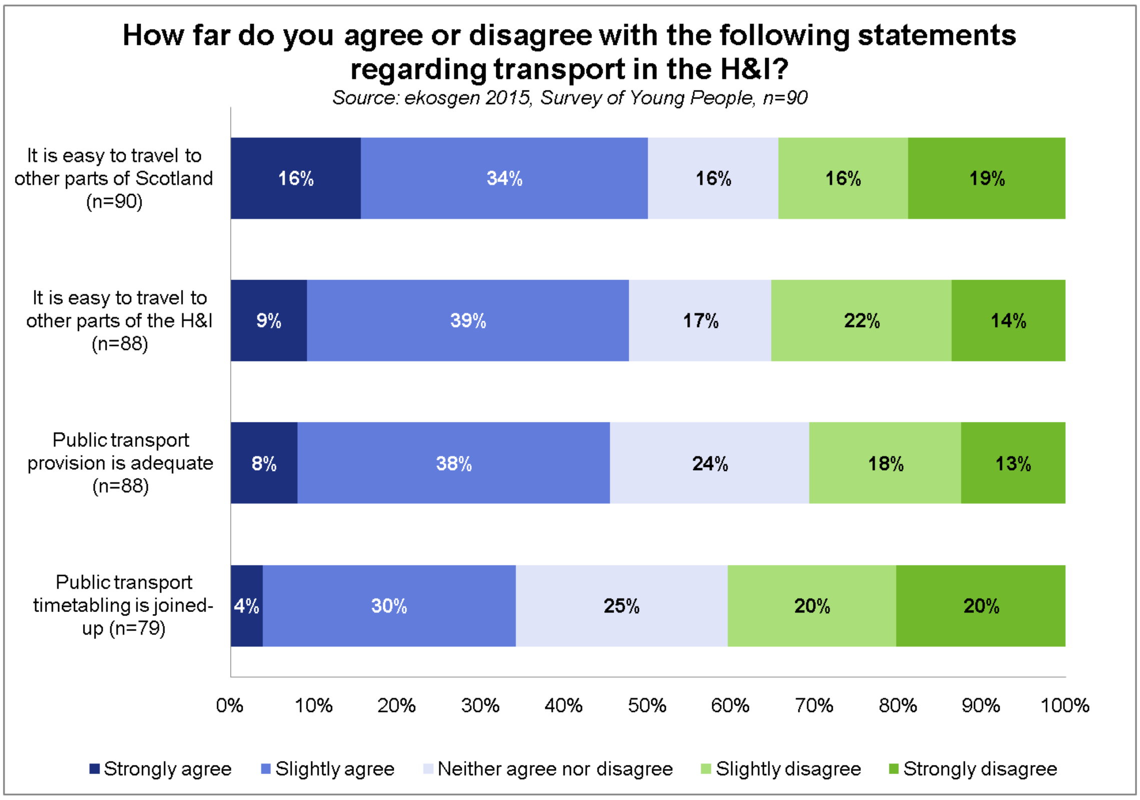
Figure 5.2



5.11 Around half of young people surveyed agree that it is easy to travel to other parts of Scotland from the Shetland Islands (50%), and to travel to other parts of the H&I (48%). These are both slightly lower than the regional average, although this is to be expected given Shetland's geographic location and responses around air and ferry affordability.

5.12 Around a third (34%) agree that public transport timetabling is joined-up, and around four in ten (40%) disagree, which is in line with the views of young people from other parts of the H&I, where 39% disagree. Less than half of respondents (46%) agree that public transport provision is adequate, although this is still above the H&I average (40%).

Figure 5.3

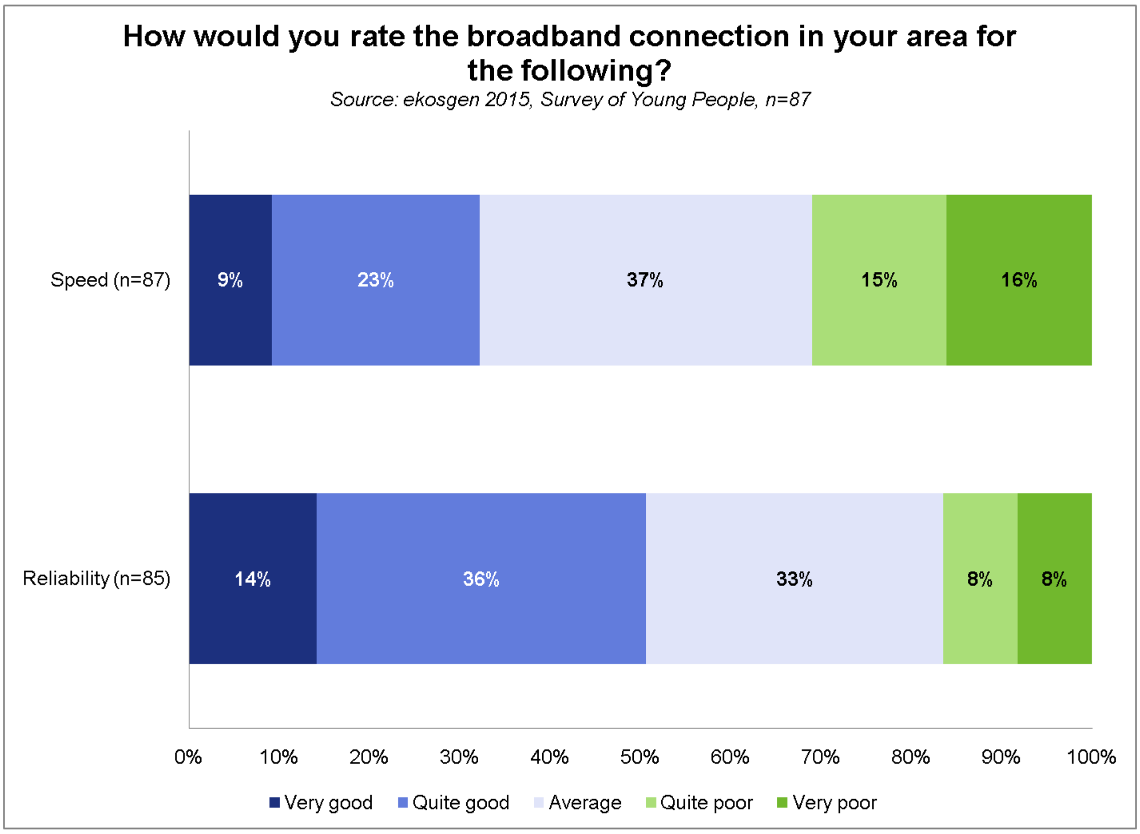


Digital Connectivity

5.13 In all, 98% of young people in Shetland had access to broadband internet (standard broadband or NGA broadband), in line with the H&I average of 96%, although the vast majority of this is standard broadband. Just 3% currently have access to NGA broadband at the time of the survey (April 2015), compared to 14% across the H&I, although this is set to change significantly in the next 12-18 months with the roll out of NGA. At 53%, awareness of the NGA roll-out is, however, lower in Shetland (alongside Argyll and the Islands) than any other part of the H&I region.

5.14 Broadband reliability in Shetland rates more favourably than elsewhere in the H&I, with around half of young people rating it positively (compared to the regional average of 43%), and just 16% rating it negatively. This may in part be due to the presence of Shetland Telecom on the Islands that has provided a certain amount of broadband infrastructure. Broadband *speeds*, however, are rated positively by just a third (32%), below the regional average of 38% (and only young people from the Outer Hebrides and Orkney are more negative).

Figure 5.4

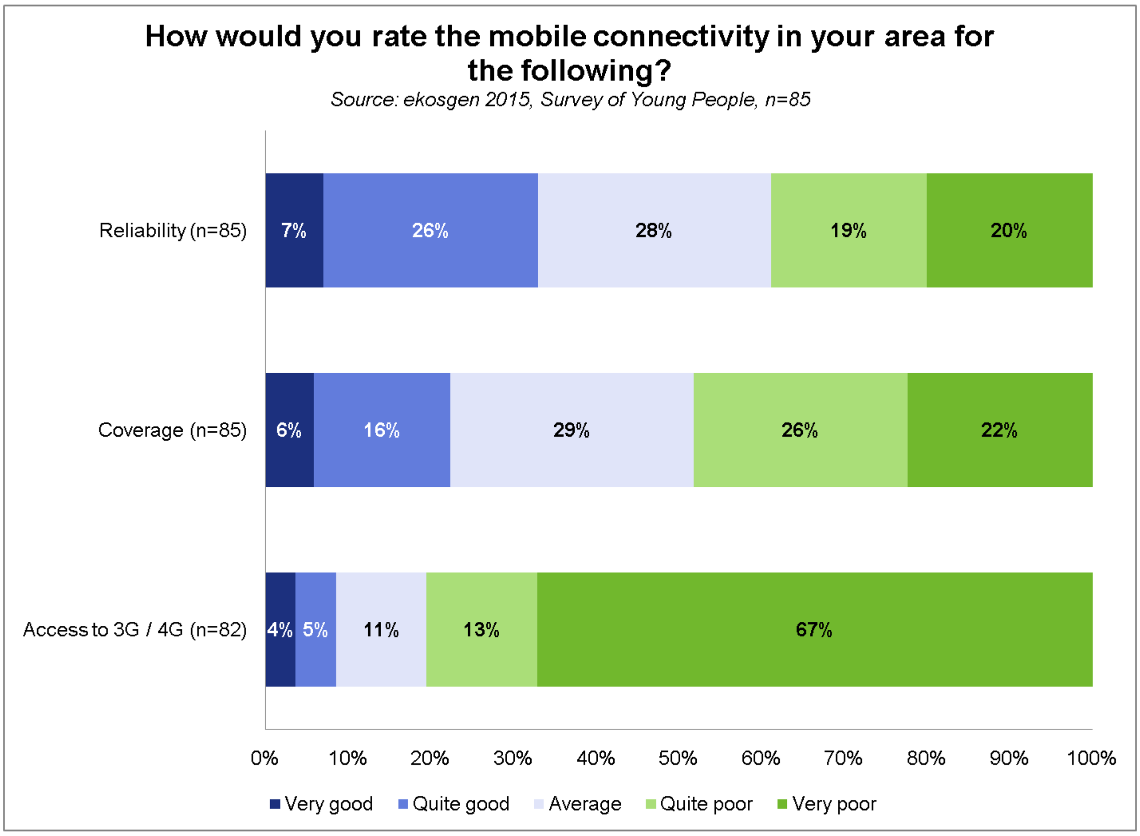


5.15 The first two of the three key benefits of NGA broadband reported by young people in Shetland were the same as for those across the H&I, namely: 1) better music, film and entertainment streaming 2) improved communication with family and friends. The third most important benefit in Shetland is better access to education and learning materials compared with better access to social media across the region. This reinforces the view on remote learning opportunities discussed in Chapter 2.

5.16 Mobile connectivity in Shetland is not rated as highly as broadband connectivity and fewer young people perceive mobile connectivity to be good compared to the H&I average. One third (33%) of young people rate mobile *reliability* positively (compared to 35% across H&I) and just 22% rate mobile *coverage* positively, compared to 29% regionally. Mobile reliability is rated more poorly by those living outwith Lerwick.

5.17 Most notably, some two thirds (67%) of young people rate access to 3G/4G as 'very poor', significantly higher than the regional average of 49%, and poorest of all H&I areas bar Orkney (87%).

Figure 5.5



Arts, Leisure and Culture

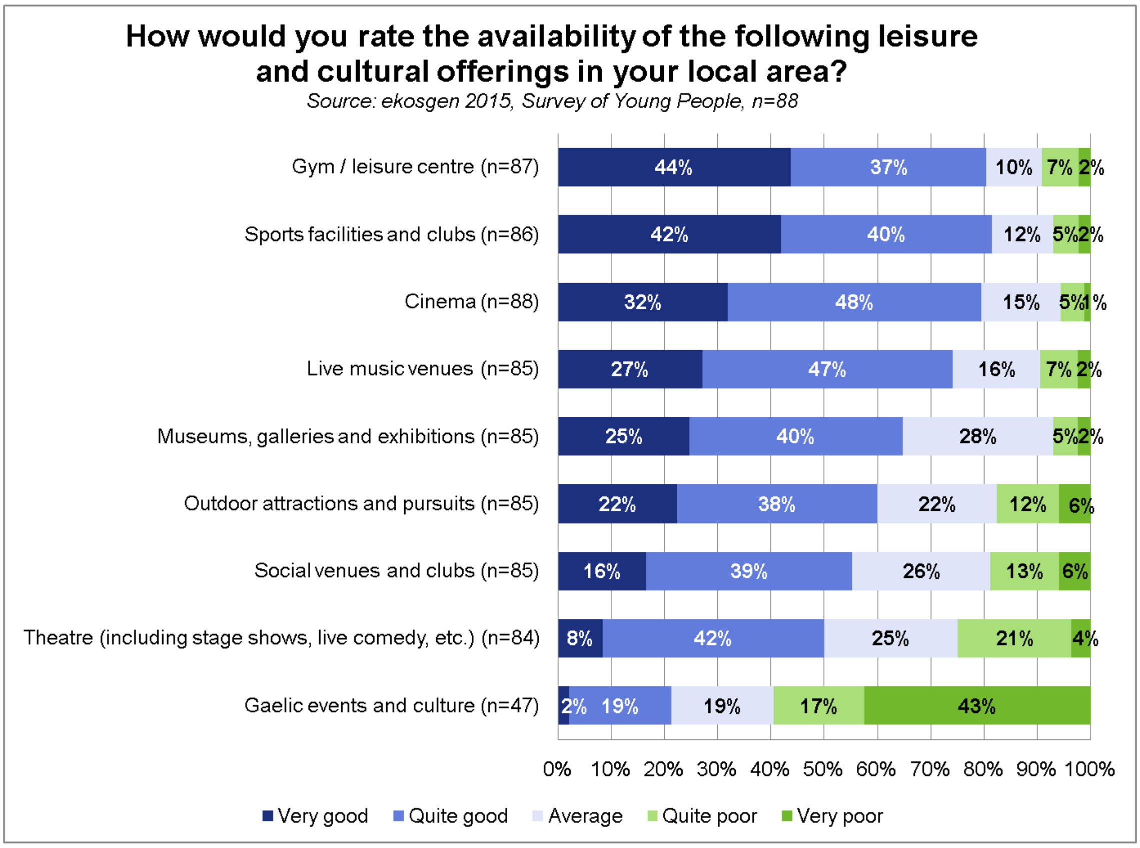
5.18 As with the H&I as a whole, there is a mixed picture on the perceived availability and strength of the arts, leisure and culture offer in Shetland. In general terms, however, the offer in Shetland is perceived as far more available than in other parts of the H&I region.

5.19 The top three most available offers in Shetland are gym/ leisure centres (rated as quite or very good by 81% of young people), sports facilities and clubs (82%) and cinemas (80%), all in excess of the regional averages.

5.20 Access to live music venues (74%), museums, galleries and exhibitions (65%), outdoor attractions and pursuits (60%), social venues and clubs (55%) and theatres (50%) also rate well, and above the regional average.

5.21 On the whole, there is little variation on the perception of the availability of cultural offerings between those from Lerwick and those living outwith Lerwick, suggesting that those from the more remote parts of Shetland still find most leisure and cultural offerings to be accessible to them.

Figure 5.6



5.22 The greatest degree of mismatch between importance of and availability of cultural offering extended to access to social venues and clubs, where 81% rated this as important, and 55% considered it available to them. Over eight in ten (84%) deemed good access to live music venues to be important, while less than three quarters (74%) rated this as available.

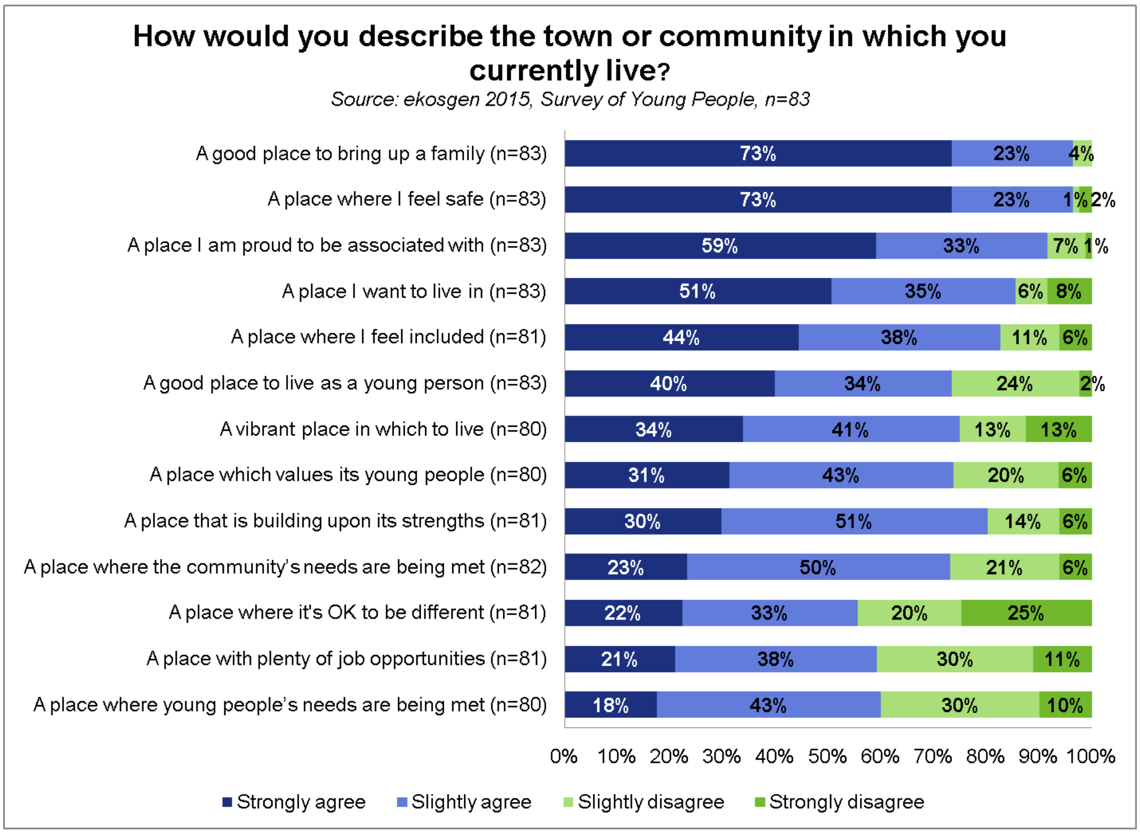
5.23 On the whole, access to various cultural offers was more important to those from Lerwick than those living elsewhere in Shetland.

Community

5.24 There are some very strong and positive feelings amongst young people from Shetland about the place in which they live. Some 92% are proud be associated with their local community – the highest of all the H&I areas along with Orkney, and significantly higher than the regional average of 78%. There is a strong sense of pride that is felt throughout the islands.

5.25 The vast majority of young people in Shetland feel safe in their local community and agree that it is a good place to bring up a family (both 96%), both above the region's average. Although over eight in ten young people feel included in their local community, a lower proportion agrees that it is a place where it's OK to be different (55%), and one quarter strongly disagree with this. This level of feeling about being/not being OK to be different is in line with the H&I as a whole.

Figure 5.7



5.26 Young people are strongly engaged with their community in Shetland, more so than in the H&I overall. Almost six in ten (59%) attend community events (45% for H&I as a whole), while around four in ten (39%) are members of local youth groups or clubs (32% for the H&I) and a similar proportion (38%) undertake volunteer work for the community (31% for the H&I). Just one fifth (20%) do not participate in the community in any of these ways, lower than for the H&I as a whole (29%).

5.27 Against a number of indicators on local community, Shetland is perceived more positively by its young people than is the case for many other parts of the H&I. This includes being a place that is building upon its strengths (81% agree, compared to 63% for the H&I), being a good place to live as a young person (nearly three quarters agree, compared to 59% for the H&I), and being a place where young people's needs are being met (some six in ten agree, compared to 41% for the H&I). Those living outwith Lerwick perceive their local community slightly more positively than those from Lerwick.

6 Future aspirations of Young People in Shetland

6.1 The previous chapters have explored the education, employment, and other lifestyle factors that affect a young person's decision as to whether they stay in or leave Shetland. This chapter looks at the relative importance of these various factors, as well as examining the future aspirations of young people living in Shetland.

Making the Highlands and Islands an Attractive Place to Live In

6.2 The top six most important themes for young people in Shetland are the same as for the H&I as a whole, although ranked differently. While high quality jobs and career progression opportunities are still important to those in Shetland, housing and cost of living are greater concerns, ranked as 1 and 2, and rated as very important by 81% and 72% in making the region attractive to young people. These are clearly significant issues in Shetland. For cost of living, little difference is evident across Shetland, whereas access to housing is even more important to those from Lerwick.

6.3 Affordable transport is an important issue for virtually all young people in Shetland, and particularly so for those outwith Lerwick, where this emerged as the second most important factor in making the area more attractive. Having good access to education (FE or HE) is very important to almost two thirds of respondents (65%), and there is little variation across Shetland.

6.4 The availability of high quality jobs is another important issue in Shetland, as reported by 63% of young people, although this is lower than for the H&I overall (68%), where it emerged as the top-ranking issue. This was more of an issue for those living outwith Lerwick.

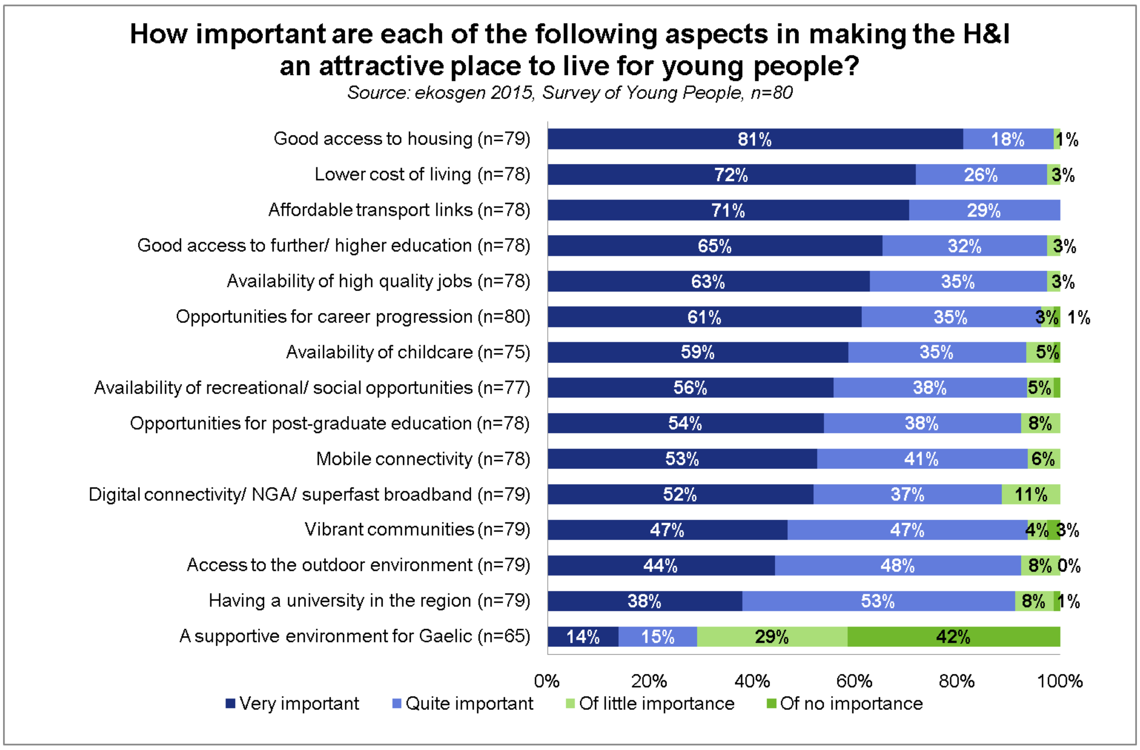
6.5 Despite limitations for career progression evident in preceding Chapters of the report, having opportunities for career progression ranks slightly lower in Shetland than the H&I as a whole (although still the 6th most important issue), but is still considered very important by 61% (compared with 64% overall).

6.6 All of the 15 themes explored in the survey were reported as important for at least 89% of young people in Shetland, and very important for at least 38% of young people, with the exception of a supportive environment for Gaelic, deemed of very little importance by the vast majority of Shetland respondents.

Table 6.1

Theme	% 'Very Important'	Shetland Ranking	H&I Ranking
Good access to housing	81	1	3
Lower cost of living	72	2	5
Affordable transport links	71	3	4=
Good access to FE/HE	65	4	4=
Availability of high quality jobs	63	5	1
Opportunities for career progression	61	6	2
Availability of childcare	59	7	11
Availability of recreational/ social opportunities	56	8	7
Opportunities for post-graduate education	54	9	10
Mobile connectivity	53	10	6
Digital connectivity	52	11	8=
Vibrant communities	47	12	9
Access to the outdoor environment	44	13	8=
Having a university in the region	38	14	8=
A supportive environment for Gaelic	14	15	12

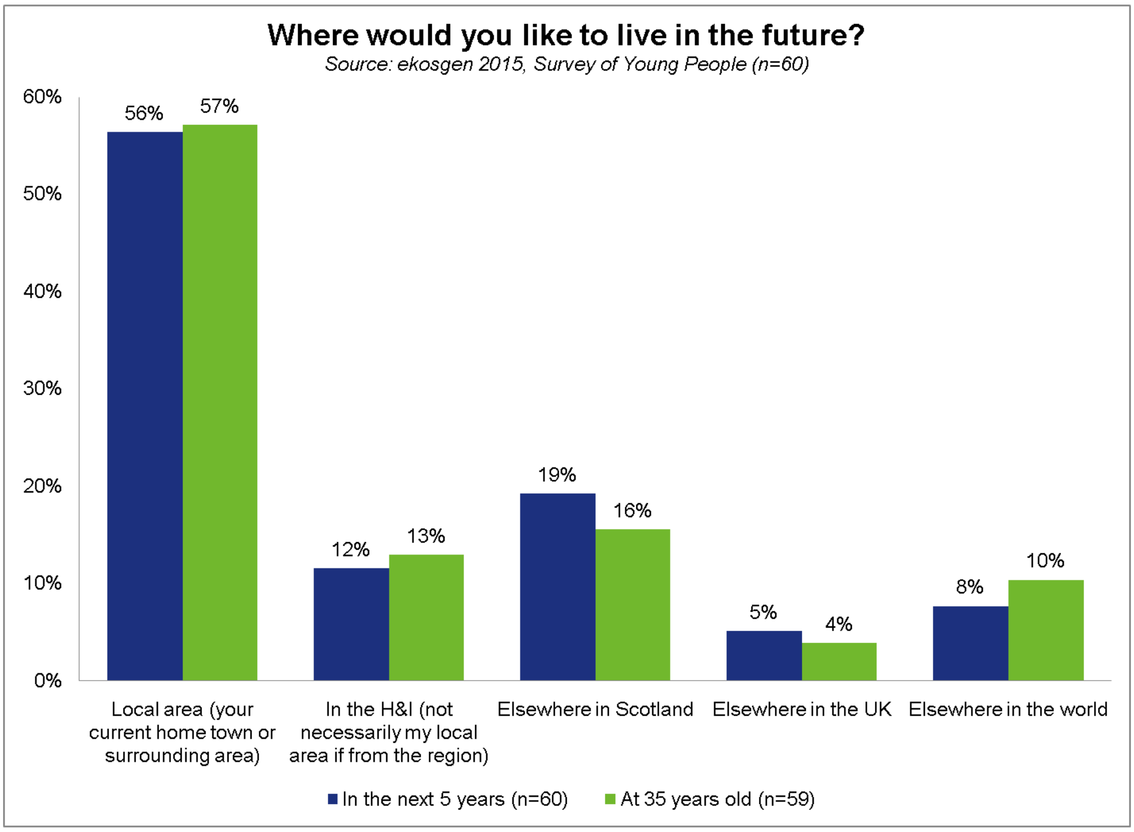
Figure 6.1



Future Aspirations

6.7 Of all the areas within the H&I, Shetland has the largest proportion of young people aspiring to stay in their local area. In all, around 56% would like to live in their local area in five years' time, the highest of all H&I areas and significantly higher than for the region as a whole (36%). Some 57% would like to be doing so at 35 years old (again, much higher than the H&I figure of 33%). Of all the H&I areas, young people's aspirations for where they would like to live at 35 is most similar to the proportion wishing to be living there in five years time, suggesting a longer-term aspiration to stay. There is very little variation on aspirations for future living within the Shetland Islands.

Figure 6.2



6.8 Over nine in ten young people from Shetland either want to be in employment (56%) or studying/furthering their education (35%) in the next five years. The desire to be in employment at 35 years old rises to some two thirds (67%). These future aspirations are in line with those for the H&I region as a whole.

6.9 A small but significant proportion of young people (6%) wish to be running their own business in five years' time, rising to around one fifth (20%) at 35 years old, slightly below the H&I averages (8% and 24%). This shows a certain appetite for self-employment within the Shetland Islands, although far greater proportions perceive there to be good self-employment opportunities than would consider taking up self-employment.

How the H&I has changed

6.10 Despite Shetland having the highest proportion of young people wanting to remain living in their local area in the short and medium term, it has the lowest proportion (41%) of young people believing the H&I to be a better place to live now than it was five years ago, below the H&I average of 51%. Over half (51%) were unsure. Only 8% felt that the H&I is not a better place to live now than it was five years ago, a smaller proportion than the regional average (15%). This varied little across Shetland.

6.11 Young people from Shetland hold a similar perception about life in the H&I in the future, with some 35% believing the region will be a better place to live in five years' time – significantly lower than the H&I average of 46%. Again, over half of respondents (53%) are unsure and 12%

feel the region will not be a better place to live (14% think so regionally). Those from Lerwick are more optimistic about the future than those living outwith Lerwick.

7 Conclusions

7.1 In all, 122 young people across Shetland have given their views on their local area and the H&I. This is a good evidence base of what young people are thinking in relation to a whole range of issues. Young people across the Shetland Islands are generally positive about their area and wish to remain living locally, amongst the highest proportions across the whole of the H&I.

Key Summary Findings

Staying and Leaving

- In all, 55% of young people in Shetland are committed stayers, well above the regional average of 43%;

- Less than one in four (24%) are committed leavers, far lower than the 40% for the H&I as a whole. Those from outwith Lerwick are marginally more likely to see themselves as committed leavers, particularly young people aged 25-30, although this remains well below the regional average.

- Almost one in five are *reluctant* leavers (18%), higher than the 13% across the H&I as a whole.

- More than two thirds of young people in Shetland think other young people stay because they have a strong commitment to the local area, that they value the quality of life and are lucky to be able to do so. This is higher than the 54%, 58%, and 61% for each respective category across the H&I as whole.

- Aspirations to attend college or university, at 68%, are close to the regional average of 72% for the H&I. This is far higher amongst young people in Lerwick (80%) than in the rest of Shetland (56%). Those outside Lerwick are more likely to wish to take an apprenticeship (29%) than to attend university (22%). In Lerwick, 50% wish to go to university.

- A range of factors influence post-school decisions more strongly than across the H&I. Most influential are: exam results (94%); the availability of interesting courses (88%) and the range of subjects taken at school (88%). This indicates educational choice and interest are important to school age pupils. For those in Lerwick, the availability of local university/college courses is also strongly influential.

- In general, those at school think work experience and local work placements have a greater influence on their decision-making than those elsewhere in the region.

- Around twice the regional proportion wish to stay locally after school (29% compared to 14%). This is highest for those living outwith Lerwick (41%).

Education

- More than half (57%) perceive there to be a good educational offering in the H&I, in line with the regional average of 56%. Young people in Shetland also think the offering is well aligned to employment opportunities – far more so than in the rest of the region. FE provision is particularly well regarded: 61% rate it as good compared to 54% regionally.

- Almost two thirds (62%) feel *able* to study locally, compared to 57% in the H&I. This is higher for those living outwith Lerwick (70%).

- That said, more than half of those in Lerwick do not think there are a good range of HE/University level opportunities locally.

- Awareness of UHI is of a similar level to the regional average, although fewer have detailed knowledge.

- More young people in Shetland think that UHI has a credible reputation than in the region overall (53% compared to 42%) and that UHI is comparable to other universities (36% compared to 35%). Almost two thirds (63%) would be happy to attend, above the 57% regionally.

- Whilst more than half (51%) see graduate placements as improving employment chances, only 30% think there are sufficient graduate opportunities. Specific awareness of ScotGrad is lower in Shetland where 86% are unaware, compared to 79% across the H&I.

Employment

- Young people in Shetland are very positive about local employment opportunities. Almost twice the proportion as regionally, think employment opportunities are good (64% compared to 35%). Around four in 10 regard career progression opportunities as good (38%), higher than the regional average of 29%.

- The majority also consider there to be good opportunities for apprenticeships. Almost seven in 10 (69%) think that opportunities are good compared to 49% for the H&I. This rises to 82% in Lerwick.

- Further, views on local self-employment opportunities are also generally positive. In all, 43% think there are good opportunities compared to 39% for the H&I, and those living outwith Lerwick are most likely to see this as a viable option.

- The *diversity* of employment opportunities is viewed less favourably by young people in Shetland. In all, 28% describe the diversity of opportunity as good (similar to the 29% regionally). Indeed, 29% disagree, rising to 38% for those living outwith Lerwick.

- Young people in Shetland are less likely to think that living in the H&I constrains ambition (55% compared to 39% across the H&I), rising to 70% for those living outwith Lerwick. Further, a higher proportion wishes to work locally – 44% compared to the regional average of 29%. Again, this is highest outside of Lerwick.

- There is a mismatch between those wishing to work locally and those who think there are diverse employment opportunities. Whilst 44% wish to work locally, 28% think there is diversity of opportunity.

- Awareness of the H&I growth sectors of Creative industries (51%) and Energy (52%) is particularly high relative to the regional averages of 38% and 45% respectively, probably due to the strong presence of these sectors locally, although awareness of Food and drink (61%) and Sustainable tourism (54%) are higher. Interest in working in a particular growth sector is highest for Creative industries (58%) and Energy (38%) and lowest in Sustainable tourism (21%) and Food and drink (18%).

- Views on what Shetland's young people want from employers are broadly comparable with the rest of the region, including staff development and a work-life balance. However, more young people in Shetland value flexible working (64%) and options for career progression (65%) compared to the H&I overall (58% and 56% respectively).

Housing

- Around seven in 10 do not think there is an appropriate choice of housing to buy (69%) or rent (73%) compared to 57% and 53% regionally. Good access to housing is ranked the most single important issue by Shetland's young people in making H&I a more attractive place to live.

- Less than one in four (24%) believe living costs are affordable, compared to 41% across the H&I. 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 H&I.

Transport

- Transport is ranked the 3rd most important issue for young people in Shetland in making the H&I a more attractive place to live (as across the H&I generally). Availability of air and ferry services is generally considered to be good (63%/71%), but both are rated poorly for affordability – particularly air travel (by 7 out of 10).

- Bus travel availability is rated as at least 'quite good' by four in ten (40%) young Shetlanders, in line with the H&I as a whole, but bus travel *affordability* is highly rated by nearly two thirds (65%).

- Around half the young people surveyed agree that it is easy to travel to other parts of Scotland (50%) and other parts of the H&I (48%) from the Shetland Islands.

- Only one third (34%) agree that public transport timetabling is joined-up, and around four in ten (40%) disagree, in line with the H&I as a whole (where 39% disagree).

Digital Connectivity

- Standard broadband is available to the majority, although just a few (3%) had Next Generation Access (NGA) broadband at the time of reporting. This is expected to increase markedly over the next 12-18 months with the rollout of NGA. Reliability is rated better than the H&I average but lower for speed.

- The bigger issue is mobile connectivity. Mobile reliability (33%) and coverage (22%) is rated lower than regionally (35%/29%), and even more poorly outside Lerwick where two-thirds rate 3G/4G access as very poor.

Arts, Culture and Leisure

- The cultural offer in the Shetland Islands is perceived as far more available than by young people in other parts of the H&I region. However, there is a mismatch between availability and importance, most notably in relation to social venues and clubs (81% rated it important, whereas 55% rated it as available).

Community

- Pride in the local community is very high amongst young people in Shetland. In all, 92% agree that they are proud be associated with their local community – the highest of all the H&I areas, along with Orkney.

- Young people are strongly engaged with their community, more so than in the region overall. The Shetland Islands are perceived more positively by local young people than is the case in many other parts of the H&I – including being a good place to live as a young person (74% agree, compared to 59% for the H&I). Those living outwith Lerwick perceive their local community even more positively.

Future Aspirations

- Shetland has the largest proportion of young people aspiring to stay in their local area. In all, 57% would like to be doing so at 35 years old (significantly higher than the 33% for the H&I).

- Around 41% of young people in Shetland see the H&I as being a better place to live than five years ago, and a lower proportion think it will be so in five years' time (35%) – although this is lower than the regional average (51%/46%).

Concluding Remarks

7.2 Young people in Shetland are very positive about the place and there are extremely high levels of pride in local communities. More young people describe themselves as committed stayers than the regional average, and more wish to work and live locally. There are good employment opportunities locally, with opportunities to progress greater than the regional average, and fewer young people think that leaving constrains ambition. There are particularly good apprenticeship opportunities, FE is viewed positively and there are good prospects for remote learning away from Lerwick.

7.3 Yet this positive feedback belies a number of issues for young Shetlanders. The cost of living is a significant factor, including the cost and availability of housing, and the cost of travel to/from the islands. Mobile connectivity is poor and a major concern for young people. The perception is also of a narrow employment base with limited diversity of employment, and those wishing to stay to work must do so in existing key sectors. Awareness of the Financial and business services and Life sciences growth sectors is limited, although awareness of Creative industries and Energy is higher in Shetland than across the H&I. There is a need to continue to broaden and diversify the employment base and to further reduce barriers to living, learning and working in Shetland, including costs of doing so.

A. Annex 1: survey response profile

This chapter provides an overview of survey respondents by age, gender, geography and status.

Number of Respondents

In all, 122 young people from Shetland responded to the survey (either online or through a paper version). This represents just under 3% of the total survey sample and a strong confidence level of 95% with a +/-9% margin of error, based on an estimated 15-30 year old Shetland population of 4,304.[20] This provides a robust survey sample and high reliability in the findings.[21]

Age

Overall, 54 (44%) of those responding were aged 15-18 years, 38 (31%) were aged 19-24 years and 30 (25%) were aged 25-30 years at the time of completing the survey. This provides a confidence level of at least 95% with a margin of error between +/-13% and +/-17%.[22]

Survey responses have a slightly higher level of representation for those aged 15-18 as a result of the marginally higher response rate amongst school pupils. These additional school responses were the product of a targeted approach to gathering data from this age group, a crucial age at which young people make decisions about their future. As a consequence, the survey sample is slightly less representative of those aged 19-30. Within Shetland, however, this over-representation is not as acute, with higher proportions in the 19-30 age brackets.

Table A.1: Shetland Survey Response by Age and Representativeness

Age group	Total (survey)	%	Shetland (%)	+/-
15-18	54	44%	**26%**	**+18%**
19-24	38	31%	**37%**	**-6%**
25-30	30	25%	**37%**	**-12%**
Total	**122**	**100%**		**N/A**

Source: ekosgen, 2015, Survey of Young People; National Register of Scotland Mid-year Population Estimates (2014).

Gender

In all, 63% of respondents from Shetland were female (77), compared to 48% across the H&I. Nearly 37% were male (45), compared to 52% across the H&I.[23]

For both males and females, this again provides a high level of confidence at 95%, with a +/-11 % margin of error for females, and a +/-16% margin of error for males.[24]

[20] Census (2011) – area office breakdown provided by Highlands and Islands Enterprise.
[21] Please note that a small proportion of young people did not provide answers to all socio-demographic questions. So, while these young people are included in the overall responses, it was not possible to attribute them to age groups; thus, not all of the categories sum to the full 122 responses received for Shetland.
[22] This confidence level is due to the smaller absolute numbers of respondents from Shetland to the survey. However, it is broadly in line with the profile of survey respondents overall.
[23] National Register of Scotland Mid-Year Population Estimates (2014)
[24] National Register of Scotland Mid-Year Population Estimates (2014).

Geography

Respondents were asked to choose the area in which they live – the location of their current family home rather than a temporary residence used for study or short-term contracts. Within Shetland a significant number of respondents were from Lerwick (54 – 47%), but most respondents (62 – 53%) were living outwith Lerwick.[25]

Status

Just under a third of respondents (32%) were in employment or self-employment and a similar proportion (31%) were school pupils or university/ college students at the time of responding.

Small numbers responding to the survey were undertaking an apprenticeship (4), were a carer or home maker (2), had finished education, but were not currently in employment nor unemployed (1). None were unemployed.

In comparison to the wider sample, respondents from Shetland are rather evenly split between school pupils, university/college students and people in employment or self-employment, and are less likely to fall within any of the other categories.

Summary

Although slightly less well represented than other areas, overall a good number of responses were received from young people in Shetland. These responses provide good confidence in the results by age, geography and gender, providing a robust data-set for analysis.

[25] This confidence level is due to the smaller absolute numbers of respondents from Shetland to the survey. However, it is broadly in line with the profile of survey respondents overall. Please note, this is based on the respondents' postcode. There were 6 individuals that it was not possible to determine the sub-area for.

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