

# ENABLING THE NEXT GENERATION

Young People and the Highlands and Islands  
Maximising Opportunities:  
SHETLAND



---

# CONTENTS

---

- Headline findings** **2**
- 1 Introduction** **3**
  - Research study approach 3
  - Research questions 3
- 2 The Shetland context** **4**
  - Introduction 4
  - Socio-economic profile 4
- 3 Key findings for Shetland** **6**
  - Introduction 6
  - Staying and leaving 6
  - Education 9
  - Employment 10
  - Community and culture 12
  - Maximising opportunities 13
  - Concluding remarks 16

# HEADLINE FINDINGS

---

## Staying and leaving

- 62% of young people in Shetland are committed stayers - the highest in the region. A similar proportion see themselves living locally in 10 years' time - almost double the regional average.
- Shetland's young people are very positive about those who choose to stay in their local area. They perceive them as lucky to be able to do so, as having strong links to their community and an appreciation of the quality of life offered. Those who leave are felt to do so for positive reasons, with a belief that many will return when the time is right.
- Almost two-thirds of school pupils in Shetland want to continue their education post-school; lower than elsewhere in the Highlands and Islands. A higher proportion than regionally want to move directly into employment, through jobs or apprenticeships. They are more likely than average to feel they have a good understanding of the jobs available in their local area and this is contributing to post-school decisions.

## Education

- Young people in Shetland have broadly positive views on the educational offer in the region, and these have improved notably since 2015. They rate the academic reputation of institutions favourably, feel there is a good range of HE opportunities and that courses align well with employment opportunities. However, many do not feel they can study their course of choice in the region or that there are institutions that specialise in their chosen subject.
- There is good awareness of modern apprenticeships amongst young people in Shetland. Most perceive them as accessible and an effective route into employment. However, awareness and accessibility of foundation and graduate apprenticeships needs to be enhanced.

## Employment

- Almost two-thirds of Shetland's young people aspire to work locally in the future; the highest proportion across the region. Most aim to be in full-time employment, with almost a fifth keen to be self-employed. However, fewer than regionally feel they have the ideas, confidence, knowledge or access to finance to realise this.
- As with regionally, lack of local opportunities and a lack of housing/affordable housing are cited most frequently as barriers to achieving employment goals. Access to childcare is more of an issue for those in Shetland than overall. However, young people from Shetland are markedly more likely to feel that the employment factors they are looking for are available locally.

## Community and culture

- Community participation is higher than average amongst young people in Shetland, although it has declined since 2015. Availability of arts, culture and leisure facilities is much less of an issue by those in Shetland, and there are good levels of engagement with such activities.
- Young people in Shetland are more positive than average about the town/community in which they live. They feel it offers safety, a good quality of life and levels of pride are the highest of all areas in the region. Shetland was the only area in the region for which there was an increase in the proportion of young people agreeing that their local area meets their needs.

## Maximising opportunities

- Compromises are perceived as a necessary part of life for young people in Shetland. They are more likely than average to feel they have compromised on digital and mobile connectivity and on courses on offer at college/university. They are least prepared to compromise on working below their skills/qualifications level.
- Good pay levels, a low cost of living and high-quality jobs are the most important economic factors for young people in Shetland; the first two being cited more frequently than regionally. Quality of life and affordable housing are the most important social factors for making the region an attractive place to live, work and study.

---

# 1 INTRODUCTION

---

1.1 In 2018, Highlands and Islands Enterprise (HIE) commissioned ekosgen to undertake a major research study focused on the changing attitudes and aspirations of young people aged between 15 and 30, in relation to living in the Highlands and Islands. The study builds on similar research undertaken by HIE in 2015 and explores how opportunities in the region can be maximised for all young people to live, work and study in the Highlands and Islands<sup>1</sup>.

1.2 This report presents the findings of young people from Shetland who participated in the research. It provides comparisons with the results for the Highlands and Islands overall and findings from the 2015 study. Where possible, analysis is provided for young people living in Lerwick, highlighting where their views differ from those living elsewhere in Shetland.

## RESEARCH STUDY APPROACH

1.3 The research consisted of an in-depth survey of young people both living in and outwith the Highlands and Islands, coupled with a programme of online focus groups with young people. These were supported by a social media engagement campaign to foster interest and engagement in the research. A broad programme of consultation with stakeholders across the region was also undertaken to explore the perspectives of employers, policy-makers and key groups in relation to the study. Additionally, desk research around regional and national policy aimed at population growth and talent attraction was carried out alongside socio-economic profiling and data analysis of young people in the Highlands and Islands and its sub-regions.

1.4 In total 164 young people from Shetland participated in the research, of which 41% (67) live in Lerwick and 59% (97) live in other parts of Shetland. In terms of age, 35% of the respondents from Shetland are 15-18 years old, 24% are 19-24 and 41% are aged 25-30. Most respondents from Shetland (71%) are female, whilst 29% are male.

## RESEARCH QUESTIONS

1.5 The study has two principal aims. The first is to provide an overview of the evolving attitudes and aspirations of young people in the Highlands and Islands and how these have changed since 2015. The second is to identify gaps within the current provision of education, training and employment opportunities and points to consider so that opportunities can be maximised for all young people. The research was designed to address the following objectives:

- Provide a socio-economic profile of young people in the Highlands and Islands overall, and of its sub-regions;
- Provide a brief overview of key regional and national policy initiatives designed to support population growth and talent attraction strategies;
- Track how the attitudes and aspirations of young people have changed, if at all, since the previous study was undertaken in 2015;
- Explore provision of and attitudes to education, training and employment opportunities across the region, identifying gaps, areas of inequality, and good practice examples; and
- Identify areas and specific points for consideration in terms of how to better position the Highlands and Islands as a place where young people want to live, work and study. Further policy interventions may be required to support this.

---

<sup>1</sup> The 2015 research is available at [www.hie.co.uk/young-people-research](http://www.hie.co.uk/young-people-research) and 2018 findings at [www.hie.co.uk/yp-research](http://www.hie.co.uk/yp-research)

---

## 2 THE SHETLAND CONTEXT

---

### INTRODUCTION

2.1 This chapter provides an overview of the social and economic context in Shetland. It includes a general overview of the area and its main centres, population and migration trends, the educational offer and employment trends.

### SOCIO-ECONOMIC PROFILE

#### Overview of Shetland

2.2 Shetland covers a large geographic area of approximately 1,500 km<sup>2</sup>. With an estimated total population of 22,990 in 2018, it has a very low population density (approximately 16 inhabitants per km<sup>2</sup>). This can present challenges to delivering services, especially in the more rural or remote parts of the islands.

2.3 Shetland is the most remote part of Scotland at almost 200 kilometres from the Scottish mainland and has a strong Nordic influence on its culture. Lerwick is both the largest population centre and the islands' administrative centre. Since the 1970s Shetland has become a major location for oil and gas activities. This has brought wealth and employment to the islands, as well as a number of associated challenges including a tight labour market and high housing costs. These pressures may ease somewhat as the construction boom of recent years relents. Other sectoral strengths include aquaculture and fisheries, and marine services.

2.4 Access to mainland Scotland and beyond is by both air and sea. Although there are daily flights to Inverness via Kirkwall, the bulk of transport links are to Aberdeen (air and ferry) and to Glasgow and Edinburgh (air). Shetland has nine populated outlying isles which are connected to mainland Shetland by ferry and, in some cases, air. A number of these isles have very low populations – i.e. less than 100. This makes economic development and overall sustainability challenging.

#### Population and migration trends<sup>2</sup>

2.5 In 2018 an estimated 4,023 people aged 15-30 were living in Shetland. This amounts to 17% of the total population, which is slightly above the proportion for the Highlands and Islands (16%) but below the national average (20%). Between 2011 and 2018 the number of 15-30- year olds in Shetland fell by 7%, whilst the total population remained quite stable (a decrease of 1%).

2.6 In 2017/18 Shetland had a total net out-migration of 75, and there was also net out-migration amongst those aged 15-29, concentrated within the 15-19 age group. In addition, the number of 15-30-year olds is projected to fall by 16% between 2018 and 2041. This is above the forecast decline for the Highlands and Islands (-13%).

#### Education

2.7 In 2017-18, 61% of school leavers in Shetland achieved SCQF Level 6 or above (higher), compared to 62% regionally. The vast majority (96%) of school leavers went on to positive destinations, above the regional (95%) and national (94%) averages. School leavers in Shetland were less likely to go on to Higher Education (33% do compared to 36% regionally and 41% nationally)<sup>3</sup>.

---

<sup>2</sup> Data in this section is from the following National Records of Scotland (NRS) publications: Small Area Mid-Year Population Estimates 2011 and 2018, Migration to and from Scotland 2017-18 and Sub-National Population Projections (2016 based).

<sup>3</sup> Scottish Government School leaver attainment and initial destinations: statistics, 2017-18

---

2.8 In contrast, Shetland had a high proportion of school leavers going straight on to employment - 39% do, above than the regional average (34%) and markedly higher than the national average (23%). This reflects the buoyant local labour market.

2.9 Further and Higher Education (FE and HE) provision in Shetland is delivered through Shetland College and the North Atlantic Fisheries College (NAFC Marine). The former provides postgraduate and undergraduate degrees, HNDs, HNCs and SVQ courses across a range of subjects, while NAFC delivers a range of courses in marine subjects.

2.10 In 2017-18 there were around 900 HE and 3,800 FE students from Shetland studying at institutions in Scotland<sup>4</sup>.

2.11 A high proportion (88%) of FE students from Shetland were studying in Shetland itself, while a further 3% studied elsewhere in the Highlands and Islands. This is substantially higher than the regional average (overall 80% of students from the Highlands and Islands were studying in the region). Conversely, only 10% of FE students from Shetland were enrolled at institutions outwith the Highlands and Islands, far fewer than the regional average (20%). Those aged 20-24 were slightly more likely to be doing so (13% compared to 10% of 16-19-year olds and 9% of those aged 25+).

2.12 HE students are more likely to study outwith the Highlands and Islands than FE students. More than half (56%) of HE students from Shetland were doing so compared to 54% regionally. Younger HE students were more likely to be enrolled at institutions outside of the Highlands and Islands (74% of 20-24-year olds from Shetland and 71% of 16-19-year olds compared to 33% of those aged 25+).

2.13 A third (33%) of HE students from Shetland were studying within the Highlands and Islands, most (30%) locally and the remainder elsewhere in the region. This is broadly in line with the regional average (34%). A further 11% were studying through the Open University, so likely studying from home in Shetland, similar to the regional average (12%).

## Employment<sup>5</sup>

2.14 Shetland has relatively high rates of employment and economic activity. In 2018, Shetland's employment rate was 81.7%, compared to 78.9% at the regional level and 74.1% nationally. The economic activity rate was also 81.7%, higher than the Scottish average (77.4%) but in line with the level across the Highlands and Islands (81.3%).

2.15 Comparative data for 16-24-year olds in Shetland is not available. However, across the Highlands and Islands overall employment and economic activity rates for those aged 16-24 (67.1% and 71.6% respectively) are higher than the national averages (57.2% and 63.3% respectively).

2.16 Reflecting the high levels of economic activity, the rate of economic inactivity in Shetland (18.3%) is below the national average (22.6%), but in line with the regional level (18.7%). Again, comparative data is not available for those aged 16-24 in Shetland, but the economic inactivity rate for 16-24-year olds in the Highlands and Islands (28.4%) is lower than the national average (36.7%).

---

<sup>4</sup> Analysis is based on data from the Scottish Funding Council for 2017-18

<sup>5</sup> Data in this section is from the Annual Population Survey January to December 2018.

## 3 KEY FINDINGS FOR SHETLAND

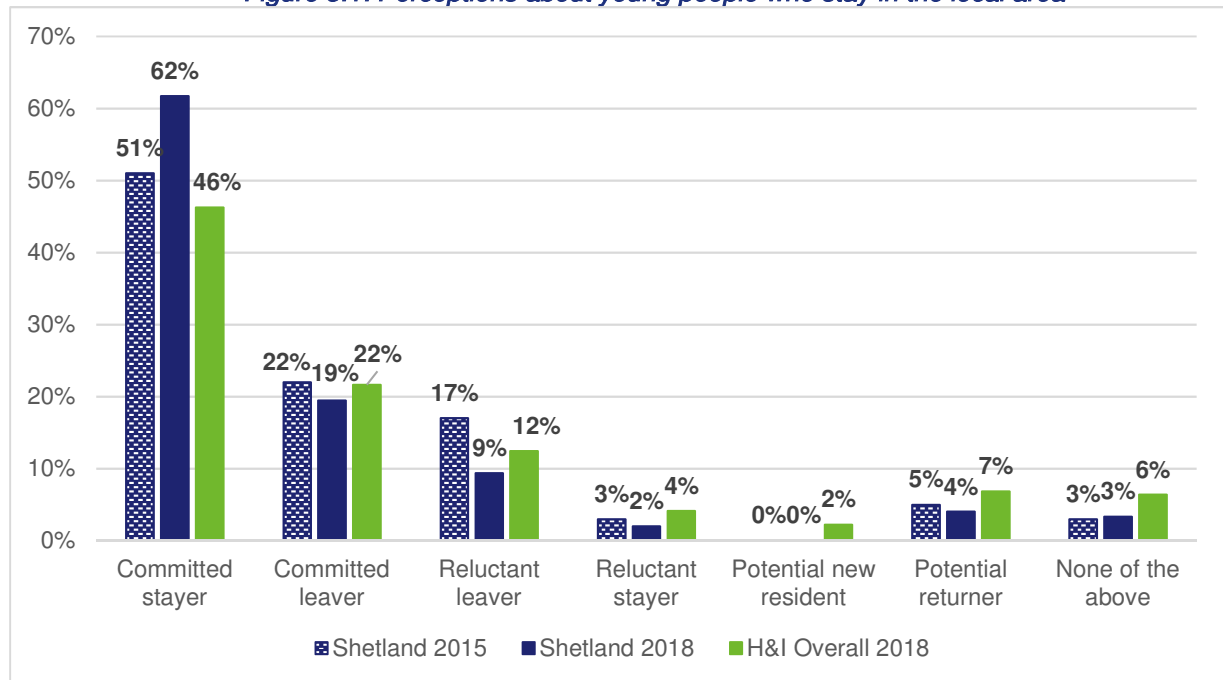
### INTRODUCTION

3.1 This section provides the key findings from the survey of young people from Shetland. As with the region-wide report it looks at attitudes around staying and leaving, education, employment, community and culture and maximising opportunities. It focuses mainly on where there are differences in the views of young people from Shetland compared to the regional average, or variations between those living in different parts of Shetland.

### STAYING AND LEAVING

3.2 At 62%, Shetland has the highest proportion of young people who identify as *committed stayers* of all areas in the Highlands and Islands (Figure 3.1). This is an increase of 11 percentage points since 2015, in line with the 10 percentage point increase for the region overall. A lower proportion than regionally identify as *committed leavers* (19% compared to 22%) or *reluctant leavers* (9% versus 12%).

Figure 3.1: Perceptions about young people who stay in the local area

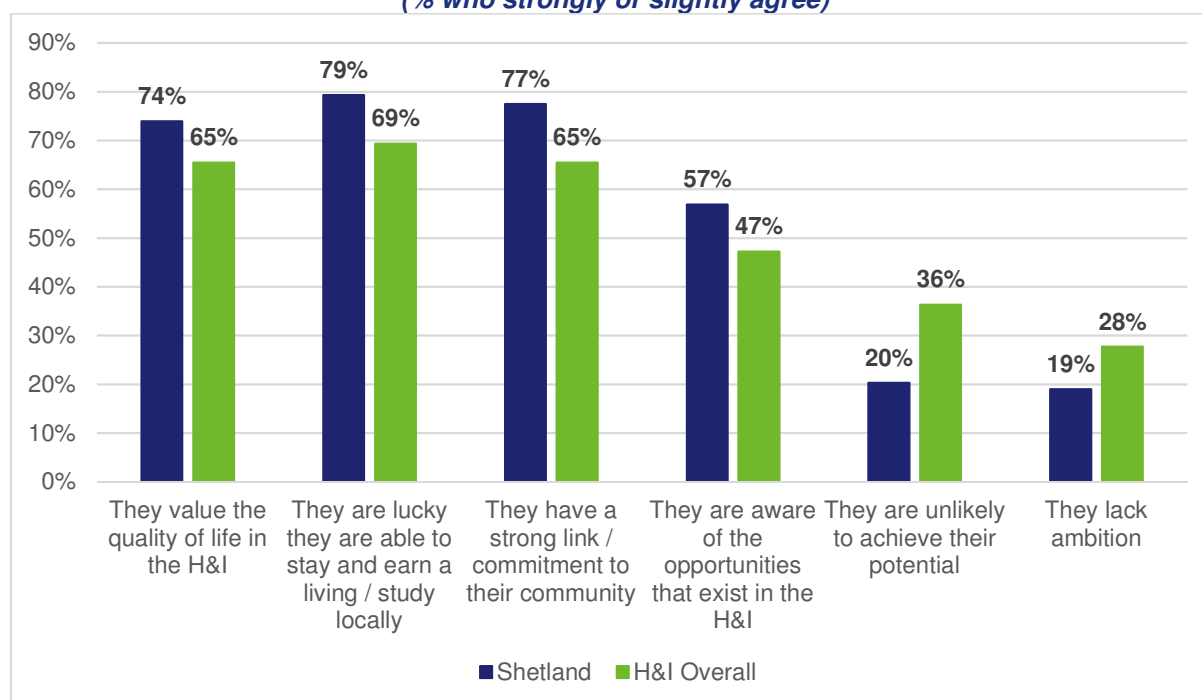


Source: *ekosgen survey of young people, 2018 (H&I overall n=2,539, Shetland n=149)*

3.3 Around six in ten (61%) young people in Shetland see themselves living in their local area in 10 years' time, almost double the 32% reported across the Highlands and Islands as a whole. In contrast, very few (8%) see themselves as living elsewhere in the region, compared to 23% regionally. Overall, driven by the appetite to live locally, young people from Shetland are more likely than average to want to be living somewhere in the region in 10 years' time (69% compared to 55%).

3.4 Young people in Shetland are more positive about those who stay in their local area than their counterparts across the region overall (Figure 3.2). Almost four in five agree that those who stay are lucky to be able to do so (79% compared to 69% regionally), and around three-quarters have strong links to their community (77% versus 65%) and value the quality of life in the region (74% compared to 65% regionally). They are also less likely than regionally to feel that those who stay lack ambition (19% agree compared to 28%) or are unlikely to achieve their potential (20% versus 36%).

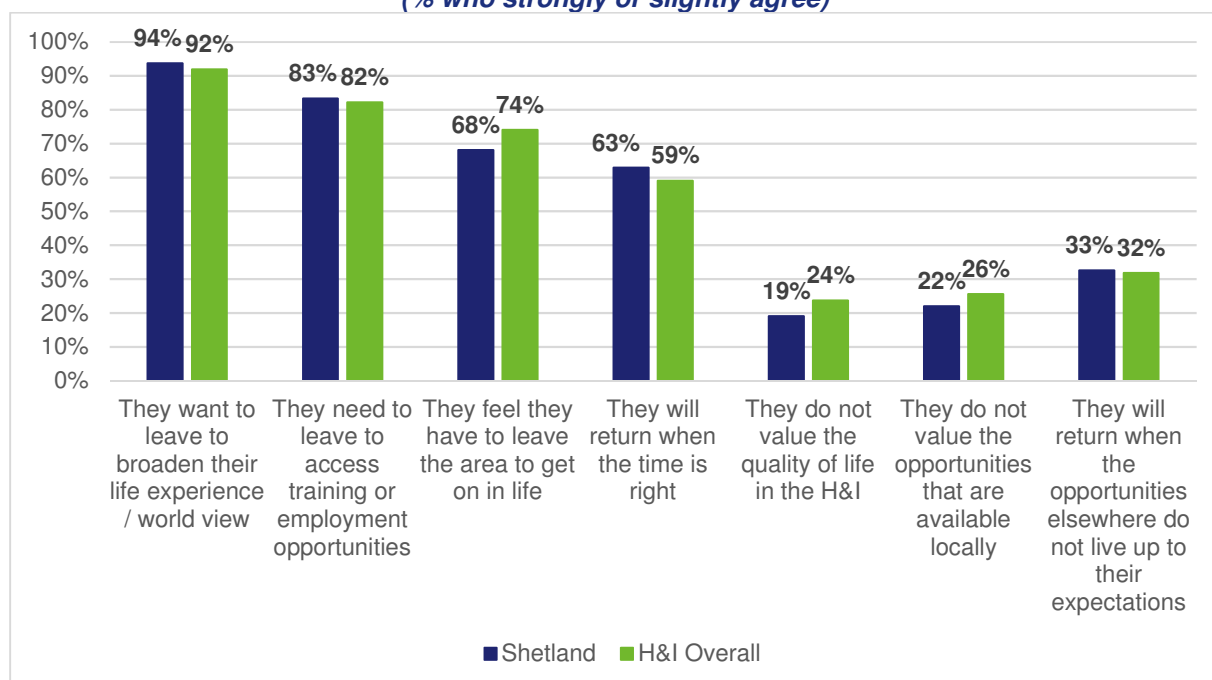
**Figure 3.2: Perceptions about young people who stay in the local area  
(% who strongly or slightly agree)**



Source: ekosgen survey of young people, 2018 (H&I Overall n=2,527, Shetland n=148)

**3.5** While there is still a feeling that young people need to leave to broaden their life experience or to access training or employment opportunities, views on those who leave tend to be more positive amongst young people in Shetland than regionally. They are less likely than average to agree that those who leave need to do so to get on in life (68% compared to 74%), do not value the quality of life in the Highlands and Islands (19% versus 24%) or the opportunities available locally (22% compared to 26%). They are also more likely to feel that those who leave will return when the time is right (63% compared to 59% regionally) (Figure 3.3).

**Figure 3.3: Perceptions about young people who leave the local area  
(% who strongly or slightly agree)**



Source: ekosgen survey of young people, 2018 (H&I Overall n=2,523, Shetland n=149)



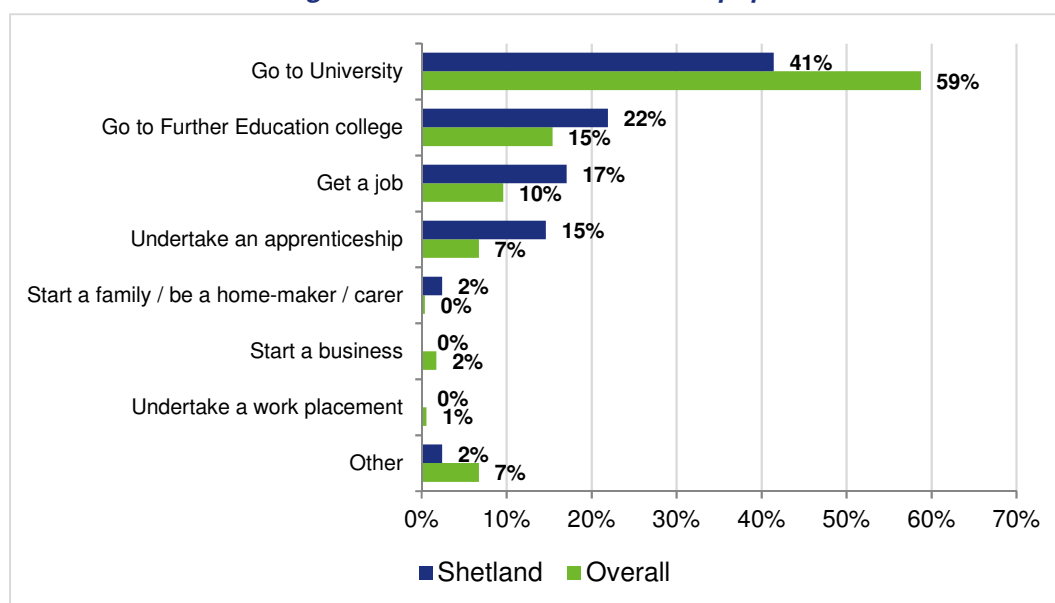
## Attitudes and aspirations of school pupils in Shetland

3.6 Although almost two-thirds of school pupils from Shetland participating in the survey (63%) hope to continue their education post-school, this is notably lower than the 74% that plan to do so regionally (Figure 3.4). This is driven by a lower proportion stating that they hope to go to university (41% compared to 59% regionally). Just over a fifth (22%) want to go to college, versus 15% overall.

3.7 Shetland school pupils participating in the survey are more likely than average to want to go into employment related activities after school – either to get a job (17% compared to 10% regionally) or an apprenticeship (15% versus 7%) (Figure 3.4).

3.8 School pupils from Lerwick were more likely to aspire to university than peers from the rest of Shetland, and less likely to be interested in undertaking an apprenticeship.

**Figure 3.4: Destinations of school pupils**



Source: *ekosgen survey of young people, 2018 (H&I Overall n=519, Shetland n=41)*

3.9 Reflecting regional findings, the greatest influences on post-school decisions were experiences outside of school, and advice from family and friends (Table 3.1). Knowledge of the types of jobs available locally had a greater influence for those in Shetland (75% versus 61% overall). Correspondingly, they were more likely to say they had a good understanding of jobs that industries in the Highlands and Islands need (47% versus 38% regionally).

3.10 While school pupils in Shetland were more likely than average to want to do something similar to their friends and family (40% compared to 29% regionally), they were less likely to feel that their parents/carers or school expects them to follow a certain path. Linked with this, they were less likely to report having had limited careers advice (Table 3.1).

3.11 While 68% of participating school pupils in Shetland cited that the range of subjects at school was good/very good (compared to 71% regionally), they were more likely than their counterparts across the region to feel that the subject choice available would limit their post-school options (54% compared to 46% regionally).

3.12 Compounding this, school pupils in Shetland were less likely than their peers across the Highlands and Islands to say they have access to digital delivery – both in school (50% compared to 70% respectively) and outside (56% versus 70%). They were also less likely to have access to other non-digital learning (e.g. evening classes) to supplement the subject choices available at school (50% do compared to 68% regionally).

**Table 3.1: Factors influencing post-school choices (% who agree)**

	Shetland	H&I Overall
The experience you get outside of school can help you decide what to do	83	85
I've had good advice from family and friends	83	77
I know the types of jobs that are available in my local area	75	61
Additional learning done through/outside of school has helped to improve my options	64	68
The range of subjects available at school will limit my options for after school	54	46
I have a good understanding about the types of jobs that industries in the H&I need	47	38
I have all the information I need to help me decide what to do when I finish school	46	44
My experience of a part-time job will influence my choice	41	44
I want to do something similar to what my family and friends do/have done	40	29
It's difficult to know what to do as I have had limited careers advice	31	41
My school expects me to follow a certain path	18	34
My parents or carers expect me to follow a certain path	17	31

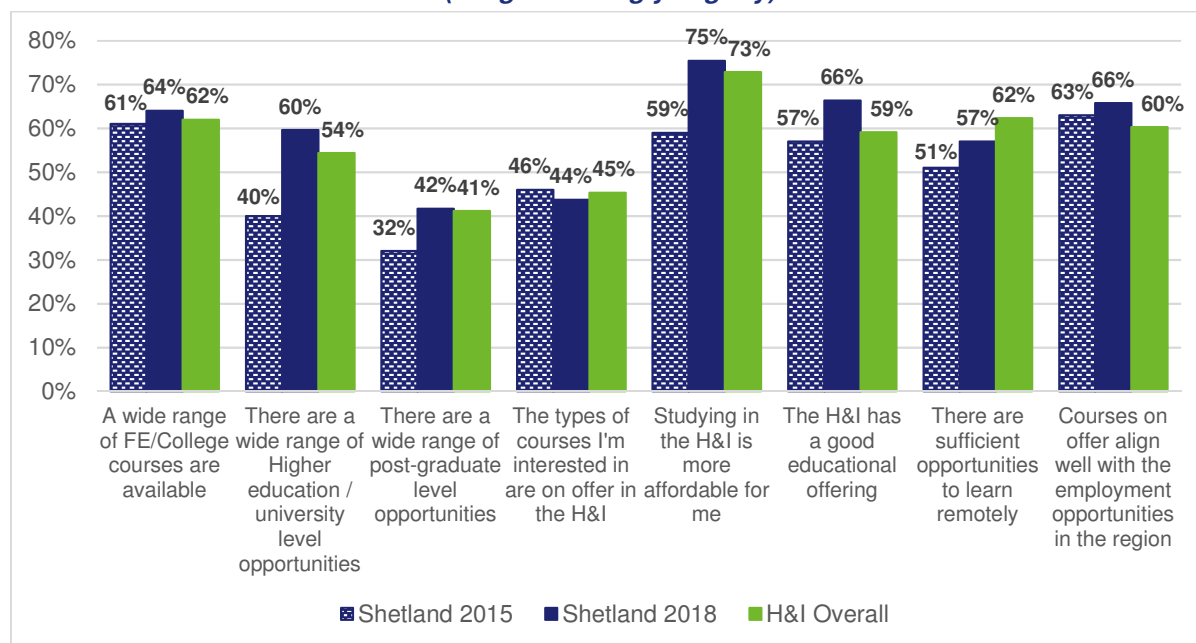
Source: *ekosgen survey of young people, 2018 (H&I Overall n=522, Shetland n=41)*

## EDUCATION

**3.13** Young people in Shetland are generally positive about the educational offer in the Highlands and Islands, broadly reflecting the regional perspective. A higher proportion, however, feel there is a good range of HE opportunities (60% compared to 54% regionally) and that courses align well with employment opportunities (66% versus 60%). They are less positive about opportunities to learn remotely (57% compared to 62% regionally).

**3.14** Two-thirds (66%) of Shetland's young respondents are positive about the region's educational offering, up from 57% in 2015. There were notable shifts in attitude in relation to the range of higher education opportunities (up 20 percentage points to 60%), the affordability of study (up 16 percentage points to 75%) and the range of post-graduate courses (up 10 percentage points to 42%) (Figure 3.5).

**Figure 3.5: Views on FE and HE provision in the Highlands and Islands (% agree strongly/slightly)**



Source: *ekosgen survey of young people, 2018 (H&I Overall n=2,262, Shetland n=136)*

3.15 Offering courses of interest, academic reputation and subject specialisation were the main factors influencing college or university choices for young people in Shetland, and regionally. Three-quarters (76%) agree that colleges/universities in the Highlands and Islands have a good academic reputation, higher than the 63% regionally. Just over half feel that institutions in the region offer the courses they want to study (55%) or the subject specialisations they are interested in (53%), which reflects overall findings (57% and 52% respectively).

3.16 Strong links to industry was of lesser importance to young people from Shetland when choosing where to study – 65% agreed that this would influence their decision compared to 73% across the Highlands and Islands overall. However, they are more likely than average to feel that colleges/universities in the region can offer this factor (78% versus 73% regionally).

3.17 While awareness of modern and foundation apprenticeships is slightly higher amongst young people in Shetland than across the region overall, awareness of graduate apprenticeships is lower (54% compared to 64% regionally). Reflecting this, those in Shetland are less likely to cite graduate apprenticeships as an effective route into employment (54% compared to 64% regionally). This contrasts greatly with the 80% who see modern apprenticeships as an effective route into employment (77% regionally).

3.18 A markedly higher proportion of young people in Shetland than regionally see modern apprenticeships as accessible (62% agreed they are quite/very accessible compared to 48% overall). Work experience at school is also more likely to be seen as accessible to those in Shetland (75% compared to 56% regionally). More needs to be done to improve the accessibility of graduate and foundation apprenticeships and graduate placements at both local and regional level (Table 3.2).

**Table 3.2: Accessibility of Apprenticeships, placements and work experience (% who agree)**

	Shetland	H&I Overall
Work experience at school	75%	56%
Modern Apprenticeships	62%	48%
Student placements	44%	45%
Foundation Apprenticeships	33%	33%
Graduate placements	25%	27%
Graduate Apprenticeships	21%	25%

Source: *ekosgen survey of young people, 2018 (H&I Overall n=2,261, Shetland n=137)*

## EMPLOYMENT

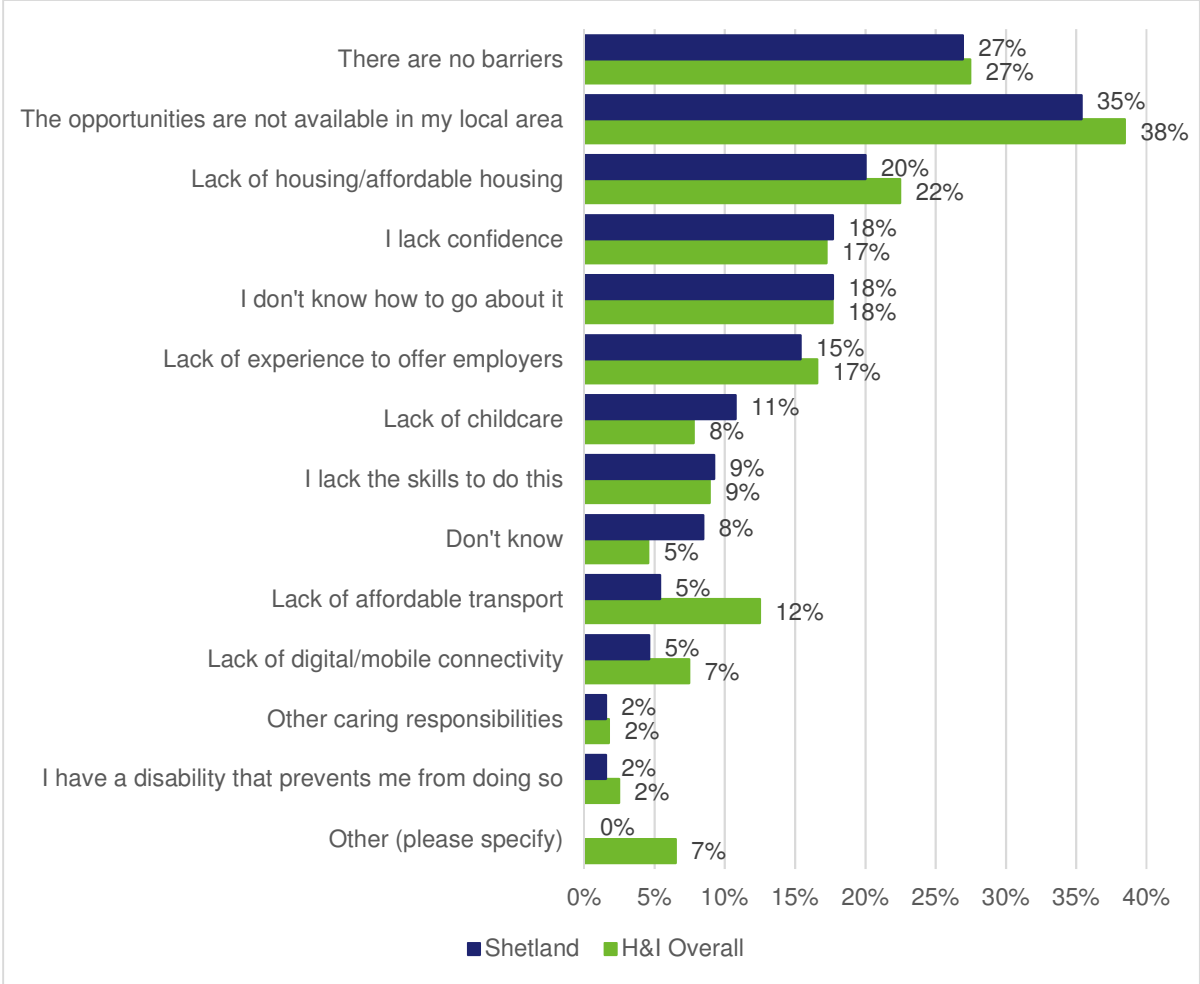
3.19 Reflecting the regional trend, most young people in Shetland aspire to full-time employment in the longer term (both 71%). Just under a fifth are aiming for self-employment (18% versus 19% regionally).

3.20 Despite similar long-term ambitions in relation to self-employment, young people in Shetland are less likely than their counterparts across the region to feel they have the interest (49% do compared to 53% regionally), ideas (40% versus 44%), confidence (32% compared to 36%) or knowledge (34% versus 37%) to start their own business. Only 13% agree that they have access to the necessary finance to start a business compared to 17% regionally.

3.21 Young people in Shetland cite similar barriers to achieving employment goals as to those from across the region overall (Figure 3.6). Lack of local opportunities was the greatest barrier (35% felt this – lower than the 38% reported regionally). Around a fifth perceived a lack of housing/affordable housing, know-how and confidence as barriers.

3.22 Transport was less likely to be a barrier to employment amongst young people from Shetland than young people regionally (5% cited this compared to 12% overall). Childcare was more likely to be seen as a challenge (11% versus 8% overall).

**Figure 3.6: Barriers to achieving employment goals  
(% who agree with each factor)**



Source: ekosgen survey of young people, 2018 (H&I Overall n=2,106, Shetland n=130)

3.23 A slightly higher proportion of young people from Shetland (68%) than regionally (64%) want to work somewhere in the Highlands and Islands in future. Almost two-thirds (63%) see this as being in their local area, an increase of 19 percentage points since 2015 (and markedly higher than the regional average of 40%). This reflects their strong commitment to staying in Shetland. Young people from Lerwick were particularly likely to want to work in their local area (68% did so).

3.24 When asked about a range of job qualities, young people from Shetland, and across the region overall, were most concerned about having a steady job (72% and 71% cited this as essential respectively) and a good work-life balance (71% and 70%). A good salary was important to 56%.

3.25 In comparison to the regional average, those from Shetland were less likely to cite opportunities to progress as essential (51% versus 61%), but more likely to value an understanding employer (67% versus 59%) and good learning/training opportunities (50% versus 45%).

3.26 Young people from Shetland were significantly more likely to feel that the employment factors they are looking for are available in their local area – three-quarters (74%) do compared to 58% regionally. In line with the regional average, 59% agreed that these factors are available in the Highlands and Islands overall.

## COMMUNITY AND CULTURE

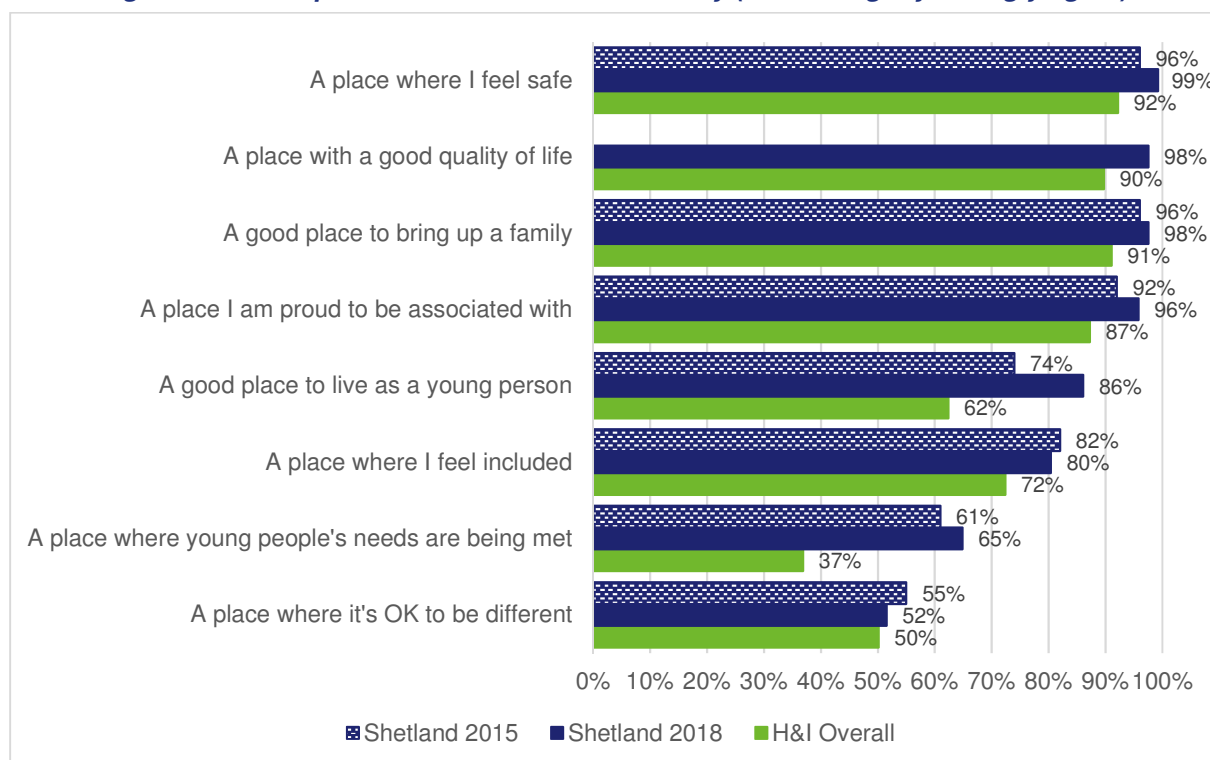
3.27 Community participation is higher than the average regionally among young people in Shetland, although it has declined since 2015 (from 80% to 72% in Shetland and from 71% to 62% regionally).

3.28 Relative to the rest of the region, Shetland's young people have more positive views of the town/community in which they live across all factors explored (Figure 3.7). It's a place where they feel safe (99% versus 92%), has a good quality of life (98% versus 90%) and is good for raising a family (98% versus 91%). Levels of pride are the highest of all areas of the region (96% compared to the regional average of 87%).

3.29 The greatest differences in opinion related to meeting the needs of young people (65% versus 37%) and being a good place to live as a young person (86% up from 74%, compared to 62% regionally). Respondents living outside Lerwick were more likely than those living in the town to see their community as a place where young people's needs are being met.

3.30 A similar proportion to regionally (52% compared to 50% overall) felt Shetland was 'a place where it's OK to be different'.

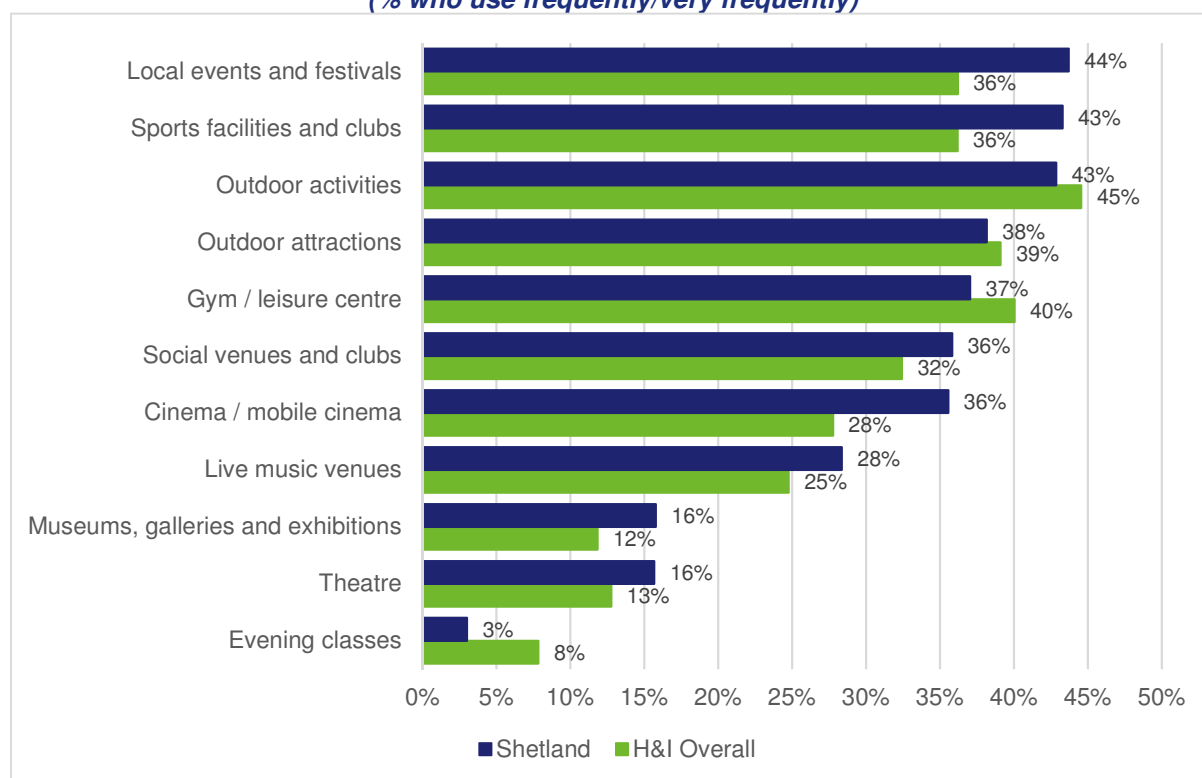
**Figure 3.7: Perceptions of the town or community (% who slightly/strongly agree)**



Source: *ekosgen survey of young people, 2018* (H&I Overall n=1,965, Shetland n=131)

3.31 There are good levels of engagement with arts, leisure and cultural activities amongst young people in Shetland (Figure 3.8). They are more likely than average to participate in most activities listed, notably the cinema/mobile cinema (36% do compared to 28% regionally), local events and festivals (44% compared to 36%) and sports facilities and clubs (43% versus 36%). Use of evening classes and gym/leisure centres is slightly lower than average.

**Figure 3.8: Use of arts, leisure and cultural activities  
(% who use frequently/very frequently)**



Source: *ekosgen survey of young people, 2018 (H&I Overall n=2,033, Shetland n=135)*

3.32 Young people in Shetland were less likely than those elsewhere in the region to report barriers in relation to use of museums, galleries and exhibitions (48% do compared to 67% regionally), live music events (60% versus 70%), the cinema/mobile cinema (49% versus 59%) and local events and festivals (55% compared to 63%). They were more likely to report barriers in relation to use of gyms/leisure centres (61% compared to 52%).

3.33 Availability of arts, culture and leisure facilities appears to be much less of an issue for young people in Shetland than for others elsewhere in the Highlands and Islands. Where barriers were identified, cost and lack of variety tended to be the most frequently cited.

3.34 Transport is a more significant barrier for young people living outside Lerwick than for those who live in the town. This will reflect the distances involved in travelling to facilities and limited public transport options, especially for those living on the smaller islands off the Shetland mainland.

## MAXIMISING OPPORTUNITIES

### Compromises

3.35 Young people in Shetland are more likely than average to see compromises as a necessary feature of life in the Highlands and Islands (90% agree compared to 87% regionally).

3.36 There are a range of compromise that young people feel are necessary to live in the Highlands and Islands. While transport and fewer job opportunities were most frequently cited by those in Shetland (87% and 70% respectively) and regionally (79% and 76% respectively), there was notable variation in terms of other factors explored.

3.37 Young people in Shetland were significantly less likely to perceive salary compromises as necessary to live in the region (26% compared to 46%), reflecting the relatively high wages available in many parts of Shetland.

3.38 In terms of compromises made or compromises young people would be prepared to make to live, work or study in the region, some notable differences were evident between young people in Shetland and those living elsewhere in the Highlands and Islands (Table 3.3).

3.39 They were significantly more likely to feel that they have already compromised on digital connectivity (52% compared to 37% regionally); courses on offer at college/university (40% versus 29%); and mobile connectivity (54% versus 45% regionally).

3.40 Reflecting views on use of and barriers to amenities, events and leisure facilities, they were less likely to cite this as a compromise that they have made (39% do compared to 47% regionally).

3.41 Working below their skills/qualifications level was the compromise that young people were least prepared to make (37% would not compromise on this in Shetland or regionally). Around a quarter would not be prepared to compromise on job (27%) or career progression (26%) opportunities, although this is lower than regionally (33% and 39% respectively). More feel they have already compromised on these factors (42% and 33% respectively), similar to the proportions citing this across the Highlands and Islands overall (40% and 31%).

3.42 While young people in Shetland were less likely than average to have compromised on a lower salary (19% compared to 29% regionally) or to think that this compromise exists (20% do not think it does versus 11% regionally), it is still an important factor to them - around a third cited that they would not be prepared to compromise on salary (32% versus to 36% regionally).

3.43 Quality of life is not generally considered an area of compromise. The majority (60%) do not feel such a compromise exists, compared to 44% regionally. One respondent commented:

*“Whilst there aren't as many opportunities for career development as I may have had if I had stayed south I prefer the quality of life that I get at home”.*

**Table 3.3: Compromises made by young people to live in the Highlands and Islands**

	I have already made	I would be prepared to make	I would not be prepared to make	I do not think this compromise exists
Accepting that transport and travel is more difficult and expensive	67%	19%	9%	4%
Having limited mobile connectivity	54%	26%	11%	9%
Having limited digital connectivity	52%	20%	17%	12%
Having fewer job opportunities and choices	42%	20%	27%	11%
Having fewer courses on offer at college/university	40%	28%	30%	2%
Having limited access to amenities, events, services and leisure facilities	39%	26%	12%	23%
Having fewer opportunities for career progression	33%	30%	26%	12%
Working below my qualification and skills level	19%	29%	37%	15%
Settling for a lower salary	19%	29%	32%	20%
Living in accommodation that doesn't fully meet my needs	16%	23%	28%	33%
Having a lower quality of life	6%	6%	28%	60%

*Source: ekosgen survey of young people, 2018 (Shetland n=96)*

## Enabling Opportunities

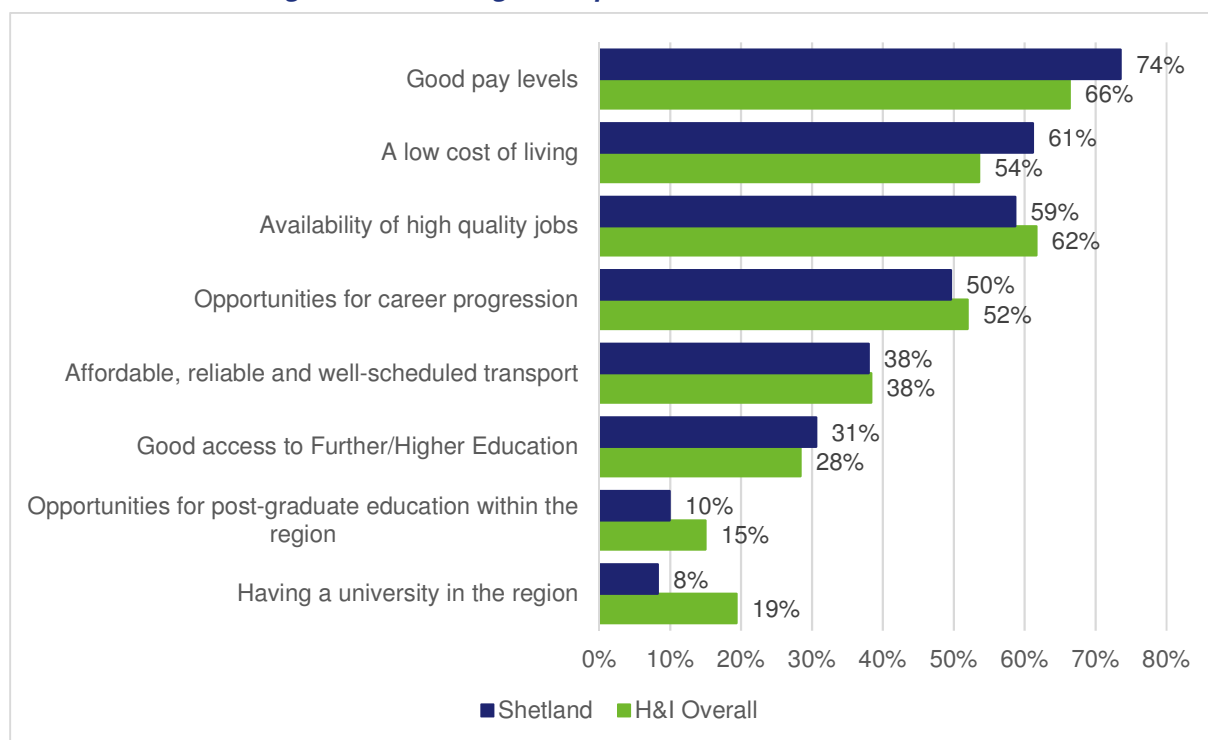
3.44 Reflecting the top three factors cited regionally, availability of high-quality jobs (60%) affordable, reliable, well-scheduled transport (60%) and good pay levels (58%) were identified by young people in Shetland as the most essential factors to make the Highlands and Islands an attractive place to live, work and study.

3.45 Relative to regionally, they were less likely to regard career progression opportunities (50% versus 61%), post-graduate level opportunities (29% versus 41%) and having a university (24% compared to 46% overall) as essential.

3.46 When ranking economic factors, good pay levels (74%), a low cost of living (61%) and high-quality jobs (59%) were most important to young people in Shetland (Figure 3.9). While a similar order of ranking was given as regionally, a higher proportion of those in Shetland cited good pay levels (74% versus 66%) and a low cost of living (61% compared to 54%) as important.

3.47 Reflecting earlier views, young people in Shetland were less likely than regionally to cite having a university in the region (8% compared to 19%) and post-graduate level opportunities (10% versus 15%) in their ranking of the importance of economic factors.

**Figure 3.9: Ranking the importance of economic factors**



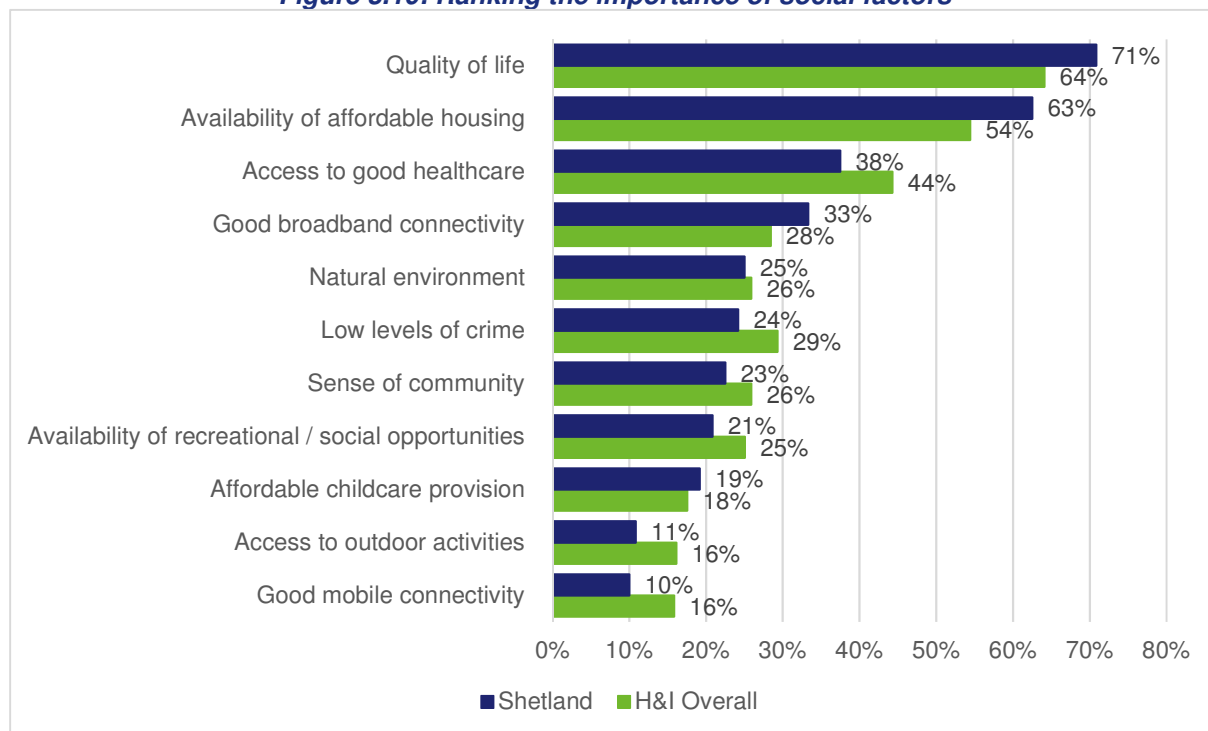
Source: *ekosgen survey of young people, 2018 (H&I Overall n=1,828, Shetland n=121)*

3.48 In Shetland and regionally, social factors seen as most essential are quality of life (82% and 75%), availability of affordable housing (75% and 70%) and access to good healthcare (70% and 72%). Relative to the regional average, young people in Shetland are more likely to cite affordable childcare (57% compared to 44%), a sense of community (47% versus 38%) and availability of recreational/social opportunities (52% versus 45%) as essential factors.

3.49 Reflecting this, quality of life and affordable housing were ranked by Shetland's young people as the most important social factors in making the region a more attractive place to live, work and study (Figure 3.10).



**Figure 3.10: Ranking the importance of social factors**



Source: *ekosgen survey of young people, 2018 (H&I Overall n=1,805, Shetland n=120)*

**3.50** Along with Caithness and Sutherland, Shetland has the lowest proportion of young people in the region who think that the Highlands and Islands is a better place to live now than it was five years ago (45% compared to 54% overall). Almost half were unsure (48%). This reflects the findings from 2015 when young people in Shetland were the least likely to feel that the region had improved in the last five years (41%) and 51% were unsure.

## CONCLUDING REMARKS

**3.51** As in 2015, young people in Shetland have very strong links to and pride in their local area. A greater proportion than regionally are committed stayers, and the area has the highest levels of young people across the Highlands and Islands who want to live and work locally. They are strongly engaged in community activities, although levels of participation have declined since 2015.

**3.52** The education offering in the Highlands and Islands is highly regarded, although many still do not feel that they can study the course they would like to regionally. School pupils have a good awareness of the types of jobs available in their local area and those that industries in the region require and this is influencing their post-school decisions. While a lack of local opportunities is a barrier to achieving employment goals, young people in Shetland are more likely than average to feel that what they are looking for in a job is available locally.

**3.53** Having to accept limited mobile and digital connectivity and fewer courses at college/university are seen as necessary compromises for living in the Highlands and Islands. While young people in Shetland are less likely to feel that they must compromise on their salary, employment-related factors, along with cost of living, are important for the region's attractiveness. Quality of life is important for young people in Shetland, and they feel they have this in abundance. Along with this, affordable housing, childcare and a sense of community are more likely to be cited as social factors essential for making the region attractive to live, work and study.

**FOR MORE INFORMATION CONTACT:**

[hie.co.uk](http://hie.co.uk)

**T:** +44 (0) 1463 245 245

**E:** [hieresearch@hient.co.uk](mailto:hieresearch@hient.co.uk)

Highlands and Islands Enterprise  
An Lòchran  
10 Inverness Campus  
Inverness  
IV2 5NA



Highlands and Islands Enterprise  
Iomairt na Gàidhealtachd 's nan Eilean