



Sustaining & developing Shetland communities

Report to SCBF Directors on Consultation Results



6th September 2023

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1. BACKGROUND AND PURPOSE OF THIS REPORT

This document sets out the findings of the various consultation and related work that has been undertaken thus far, all of which has the intention of informing the content of the business plan to be agreed between Shetland Community Benefit fund and SSE Renewables.

The document aims to set out the key findings from each stage of the process within a single document, with this including the following inputs:

- The issues identified in the initial “Shetland Today” document from September 2022, which drew upon existing desk research and individual stakeholder consultations.
- The results of the exploratory, qualitative phase of consultations, which included a series of group and individual discussions with various stakeholder groups.
- The results of the large-scale community consultation survey, this being the main element of quantitative engagement with the Shetland community as a whole.
- The results of the accompanying business survey.
- The results of the accompanying survey of voluntary and community organisations.

The results and key issues arising from each are set out in Sections 2 to 6 of the report.

The primary purpose of the report is to provide the Directors of SCBF with a clear statement of the consultation findings and related issues, in order that they can draw conclusions as to the priorities and key outcomes to be addressed within the business plan, which will be developed thereafter. In Section 7 of the report, we comment briefly on the issues to be considered in identifying those priorities and outcomes.

2. KEY ISSUES FROM “SHETLAND TODAY” REPORT

The “Shetland Today” report was based on an analysis of the desk research available at the time alongside a series of initial stakeholder discussions. It resulted in a range of themes being identified with key questions for the subsequent consultations emerging from this. Initial feedback from various stakeholders, and in the feedback from subsequent qualitative research, confirmed that these themes and issues represented a good overview of the challenges facing Shetland in the future.

These issues and the associated questions are summarised below:

Theme	Key Question
Shetland’s People	How can the Viking Community Fund address the issue of an ageing population and, especially, what can be done to retain and attract back younger people to Shetland.
Shetland’s Economy	How can the Viking Community Fund help to maximise wealth creation in Shetland and ensure that the benefits of this are widely shared across Shetland’s people and communities.
Poverty and Inequality	What can be done through the Viking Community Fund to help issues of affordability, poverty, and social and economic inequality in Shetland.
Housing in Shetland	How can the Viking Community Fund help to address issues of housing supply and affordability in Shetland?
A Healthy Shetland	What could be done through the Viking Community Fund to address issues of physical and mental wellbeing in Shetland?
A Connected Shetland	<p>What could be done through the Viking Community Fund to address issues of PHYSICAL connectivity and transport within Shetland?</p> <p>What could be done through the Viking Community Fund to address issues of VIRTUAL connectivity within Shetland, including both broadband connectivity and mobile phone coverage?</p>
Community Life	<p>What could the Viking Community Fund contribute to ensuring that the right community facilities are available to meet the needs of Shetland’s communities?</p> <p>What could be done through the Viking Community Fund to foster community participation and volunteering across Shetland’s communities?</p>

Theme	Key Question
Environment and Climate	How can the Viking Community Fund help ensure that Shetland’s natural environment is preserved for future generations and that we can contribute to a transition to “net zero”.

These discussion point formed the basis of the exploratory qualitative consultations, the results of which are summarised in the following section.

The full “Shetland Today” report can be found at:

<https://ibp.eu.com/wp-content/uploads/sites/10/2022/09/Shetland-Today-final-230922.pdf>

3. KEY ISSUES FROM QUALITATIVE CONSULTATIONS

Overview

Following on from the publication of “Shetland Today”, in the latter part of 2022 and the early part of 2023, we undertook a range of exploratory qualitative consultations in the form of focus groups and individual consultations with a range of stakeholders including:

- Members of the general public from across Shetland.
- Young people specifically (in school and youth work settings)
- People involved in voluntary and community organisations
- Businesses and business groups
- Community councillors
- Individual organisational stakeholders, including those involved in community planning structures.

These qualitative consultations allowed us to explore further stakeholders’ priorities for the use of the Viking Community Fund and also fed into the development of the quantitative research material that forms the basis of subsequent sections of this report. In this section, we provide an overview of the key issues that emerged from this programme of qualitative consultations.

Key Issues

A starting point that emerged clearly in these discussions was the need to **protect the existing good things about Shetland**. It was clear that residents had substantial pride in Shetland which was particularly driven by a strong sense of shared experiences and by pride in Shetland’s natural environment, history and culture.

However, it is important to **recognise the diversity of Shetland’s communities**, particularly on a geographical basis. The context and issues for people in Lerwick are different from those in more remote areas and, especially, the islands and outer islands. A common theme in these discussions was the need for support to recognise different local needs and priorities. In addition, there was a common view that the Fund should place a particular priority on seeking to address the disadvantages that more rural communities faced, with a view to maximising equality of opportunity in both an economic and social sense.

Within these discussions, the challenge of **retaining and / or attracting back young people** to Shetland was seen as central to what the Fund should be doing as this was seen as absolutely crucial for a successful Shetland in the future. Importantly, many of the other issues covered in the initial Shetland Today document were seen as essential contributors to addressing this issue. For example:

- Attractive **learning and work opportunities** are essential to encourage young people to make their life in Shetland.
- A suitably **vibrant social life**, especially for young people is part of the attractiveness of remaining in Shetland or not.
- Availability of suitable **housing** at an affordable rate is essential.
- Addressing the issues that we note below in relation to **cost of living** will make Shetland more attractive to young people.

In terms of the substantive issues explored in the groups, all of the themes identified in Shetland Today were recognised as having some importance by at least some participants. However, in addition to the “cross-cutting issue” of retaining and attracting back young people, certain issues were particularly apparent in these exploratory discussions. These were:

- **Energy options and costs:** a common theme in the discussions was the apparent paradox of Shetland being a significant national energy supplier but with energy costs for local people being disproportionately high; there were considerable discussions around potential actions, including community-based solutions to address this.
- **Food dignity:** this was recognised as a growing problem and, again, an area where community-based solutions could be supported.
- **Transport availability and costs:** this was seen as having a significant impact on cost of living and on the opportunities available to people, especially within Shetland’s more remote communities.
- **Broadband and mobile phone connectivity;** this was identified as an area of concern by both individual residents and businesses but with the situation being a “patchy” one; this was not just about individual quality of life but impacted significantly on potential economic opportunities (e.g. establishment of new “remote” businesses, opportunities for home working).

These themes again illustrate the inter-connectedness of the themes that were explored in so far as all of these relate in some manner to cost of living / poverty and inequality issues but manifest themselves in different ways and with different impacts and potential solutions.

From a business perspective, common concerns were about **access to labour** (with a loss of access to incoming workers prompting a need for greater vocational education and training to develop skills locally) and about **distance and costs to market**.

The latter point reflected a very common issue within the qualitative consultation around **transport issues** with some participants commenting on what they considered to be poor and / or expensive connections from Shetland to elsewhere (with this also applying to some extent to intra-Island transport). Some participants expressed the need for “fixed links” between the islands and for action to be taken to improve ferry and air services. This prompted considerable discussion as to the role of SCBF / the Fund in addressing such issues, where very substantial capital expenditure may be required - participants saw two broad roles in this respect being (a) to mitigate the current impacts of these transport issues and (b) to undertake a “strategic leadership” role in addressing them (as discussed below).

These points reflect a broader area of discussion as to where SCBF / the Fund could best make a difference. In some areas (such as transport and housing) there was uncertainty as to how the Fund could “add value” to existing activity. In general, and especially in our consultations with individual stakeholders, there was a common view that **the Fund should focus primarily on areas not emphasised by existing funders**, which would typically include areas related to economy, cost of living and connectivity.

A further overall theme in these discussions may be described as **self-sufficiency**, with there being a desire for the Fund to support activities that would make Shetland less reliant on external inputs (including labour). This would mean, for example, initiatives to make better use of Shetland’s natural resources of land and sea, encouragement for small local businesses (especially those that reflect Shetland’s culture), sustainability and waste reduction initiatives. Community-based solutions were seen as being at the heart of this.

Indicative Areas of Opportunity

These qualitative discussions identified some early ideas that stakeholders felt would be appropriate for the Fund to work on, which would help to address the issues and challenges identified. This included ideas that emerged from the various “public” and similar groups as well as specific ideas explored with potential partners.

Any such ideas would be collated and revisited as part of the implementation of the eventual business plan, where they are consistent with the priorities and outcomes chosen, but at this stage it is helpful to consider some illustrative examples that arose in these discussions (including both group discussions and individual stakeholder consultations). This provides an insight into the sorts of activities to which the Fund **could** contribute and should thus help to inform discussions as to priorities and outcomes.

Selected examples that arose in the discussions included the following (it is important to stress that these are simply illustrations of the sorts of suggestions that arose in the discussions and are not put forward here as specific recommendations):

- Enhanced youth work activities that will focus on young people developing the skills, confidence and capabilities they will need in the future.
- Young people’s volunteering activities including “Youth Voices” activities such as a radio station, podcasts etc.
- Establishment of Modern Apprenticeship schemes and similar training schemes aimed at equipping young people to work in Shetland’s key business sectors.
- Targeted schemes to encourage the establishment of new businesses.
- Support for new heating schemes including, for example, extension of district heating and local turbine schemes.
- Home insulation schemes.
- Promotional and behavioural change initiatives targeted at, for example, reducing food waste and improving energy efficiency.
- Support for re-use and “grow your own” activity.
- Support for “Pantry” type activities aimed at providing lower cost food and groceries.
- Support for community transport and vehicle sharing initiatives.
- Support for specific community broadband / wireless schemes.
- Infrastructural work aimed at facilitating walking and cycling as a travel choice.
- Promotional and behavioural change initiatives aimed at encouraging walking and cycling as transport choices.
- Contribution to targeted transport subsidy schemes.
- Feasibility study and influencing work related to wider transport challenges.

Based on our discussions with individual partners, we believe that there is considerable enthusiasm amongst these partners to work in partnership with SCBF / the Fund in order to develop further such ideas.

How the Fund Should Intervene

The idea that the Fund would support “delivery” projects delivered by individual organisations, whether on its own or in partnership with others, was largely taken for granted when it arose within these qualitative consultations. However, a particular point made was that SCBF / the Fund could potentially deliver an influencing and strategic leadership role in helping to address those issues that it identifies as its priorities.

This could include, for example, things like: taking the initiative to bring partners together to explore and develop approaches to specific issues; developing the evidence base to influence local and national partners on areas of interest; undertaking feasibility studies and similar (the latter being a potential role of SCBF / the Fund in those circumstances where it may not directly fund the delivery of projects, services and activities).

Potential Principles for the Fund to Adopt

These initial qualitative consultations also postulated a number of potential underlying principles for the operation of the Fund, for which there was general support amongst community and other stakeholders. These included:

- **Additionality:** bringing something new to the table.
- **Complementarity:** not duplicating existing activity.
- **Sustainability:** Delivering a sustainable legacy.
- **Equity:** addressing any disadvantages of living in Shetland and, specifically, the challenges faced by people living in more remote areas, maximising their access to opportunities of all sorts.
- **A long-term approach:** allowing for sustained investment in key priorities.
- **Partnership:** -working with others to maximise outcomes.

These “principles” (or similar) would sit alongside the priorities and outcomes to be chosen by SCBF for the Fund and would describe “how” the Fund would operate (this sitting alongside the question of “what” it would do).

4. COMMUNITY SURVEY FINDINGS

Introduction

The quantitative surveys were designed to provide broader input into the issues explored in the previous section, providing an opportunity for a greater number of people to have an input into the consultation process.

The most significant element of the consultation involved a large-scale community survey. This included quantitative questions pertaining to the importance of 12 potential outcomes that were identified through the initial “Shetland Today” review phase and subsequently refined further via the qualitative research. These were:

- Better broadband and / or mobile phone connections.
- Better transport links within and between communities.
- Greater participation in community life.
- Improved housing supply and affordability.
- Improved physical and mental health and wellbeing.
- Improved arts, cultural, sports and recreation opportunities.
- Improved performance of Shetland’s economy.
- More younger people wanting to stay and / or come to Shetland.
- Preservation and enhancement of Shetland’s natural environment.
- Reduced cost of living in Shetland.
- Reduced poverty and inequality.
- Shetland being more self-sufficient in things like food, other goods and services.

The community survey also included a number of open-ended questions related to: what people most like about Shetland; what people think are the challenges for Shetland in the future; identification of major issues that people felt missing from the above list, along with identification of specific ideas; further comments that people wished to make about how the Viking Community Fund should be used for the benefit of Shetland. IOBP have gone through all of these comments and coded them to a series of common themes.

The results of this element of the community survey are set out in detail in this section. Separately, detailed data tables and a full verbatim listing of the open-ended comments, have been prepared and are available on request.

Methodology and Response Profile

The main method of issue of the survey was through a Royal Mail Leaflet Drop of a hard copy questionnaire, with Royal Mail being contracted to deliver this to all households in the ZE1, ZE2 and ZE3 areas.

In addition, the survey was promoted online through the SCBF website, with posts being boosted to promote the survey across Shetland.

Finally, a programme of follow-up interviews was undertaken, which focused particularly on a mixture of smaller areas and areas that were slightly under-represented from the initial phases of work.

In total, there were 1,342 responses, of which 823 were by post, 418 online and 101 via the telephone follow-up. It should be noted that not all questions were answered by all respondents. In some cases, individual respondents chose to leave certain questions blank and / or gave a “Prefer not to say” option (respondents were instructed that they could do so if they wished). The specific base number of respondents to each question are noted below, where appropriate.

The response profile by age is tabulated below:

Age	Population %	Response %
16-24 (includes 18 responses aged under 16)	11%	7%
25-44	29%	26%
45-64	35%	31%
65+	23%	36%
Total	100%	100% (base: 1,233)

Whilst there is a good spread of responses overall in terms of age, people over 65 were disproportionately likely to respond and those in other age groups somewhat less likely to have done so, leading to an older age profile than that for Shetland as a whole.

56% of the 1,193 respondents that provided the relevant information were female and 43% were male (4 respondents gave an “other” response). The comparative figures for Shetland are 51% and 49%, showing that females were slightly over-represented in responses.

The current profile of responses by working status is as follows (no direct comparison figures are available for this question):

Working Status	Response %
Working full-time	35%
Working part-time	13%
Self-employed	10%
Unemployed, seeking work	1%
Looking after home and family	1%
Not able to work due to health reasons	3%
Retired	36%
Other	2%
Total	100% (base: 1,243)

The sample has a significant proportion of responses from working, self-employed and retired people. There are fewer responses from other groups which partly reflects the prevalence of those groups but it is quite possible that they are also somewhat under-represented in responses.

The profile of responses by geographical area within Shetland is shown below (the different parts of Mainland are a subset of the overall Mainland figures and are shaded and italicised):

Location	Population %	Response %
Bressay	2%	2%
Burra and Trondra	1%	3%
Fetlar	<1%	<1%
Mainland	82%	78%
<i>North Mainland</i>		12%
<i>South Mainland</i>		17%
<i>East Mainland</i>		3%
<i>West Mainland</i>		13%
<i>Central Mainland</i>		10%
<i>Lerwick</i>		23%
North Isles	7%	9%
Outer Isles	1%	2%
Scalloway	3%	3%
Whalsay	5%	3%
Total	100%	100% (base: 1,247)

These figures show that the response profile mirrors broadly the profile of Shetland as a whole, other than there being a somewhat higher level of response from Burra and Trondra.

Overall, any differences in the profile of response across the above categories of response are not significant enough to have a material impact on the Shetland-wide figures. It is, however, important that the views of specific sub-groups of respondents are understood and this is addressed in the analysis which follows. In the following section, we comment on significant differences in the initial quantitative results according to respondent categories, based on responses from this initial postal and online phase.

The full data tables breaking down responses by all of the above categories has been prepared and is available on request.

Perceived Importance of Key Outcomes

Respondents were provided with a list of possible outcomes and were asked to rate the importance of these on a scale from 1 to 10, where 1 was “not at all important” and 10 was “very important”. The survey questionnaire noted that a number of these issues were related to one another and indicated that it may be that the Viking Community Fund is only able to help in some areas.

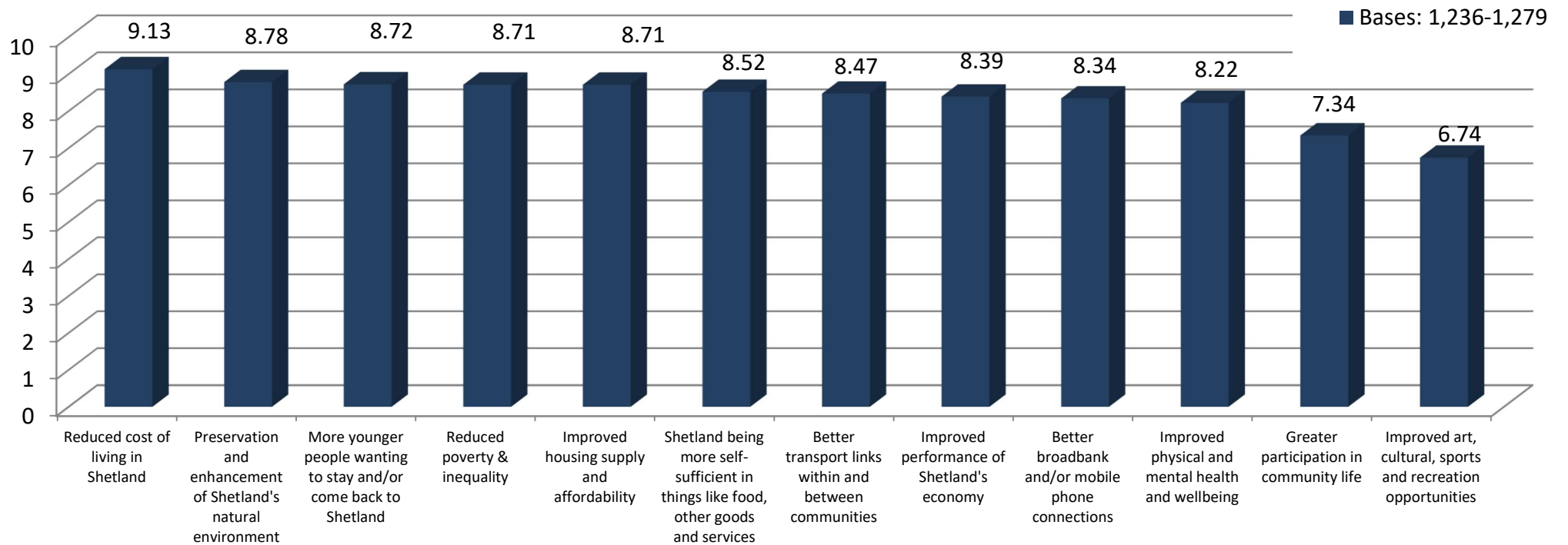
The table over the page summarises results for this question.

In an overall sense, these figures show a particularly high level of importance being ascribed to reducing the cost of living in Shetland (with a mean rating of 9.13 on the 10-point scale). However, when looked at in this way, all of the various issues are accorded a relatively high level of importance with almost all being recorded a mean rating of between 8.22 and 8.78). However, it should be noted that the mean level of importance ascribed to each of “greater participation in community life” and “improved arts, cultural, sports and recreation opportunities” is somewhat lower (7.34 and 6.74 respectively).

Overall, these figures suggest that all of these desired outcomes are seen as important to some degree but that this is particularly so for reduced cost of living and much less so for community life, and for arts, cultural, sports and recreation opportunities.

Community Consultation - Overall Perceived Importance of Key Outcomes (Mean Rating on a 10-point scale)

Please say how important you think each of these things will be for Shetland in the future, on a scale of 1 to 10, where 1 is “Not at all Important” and 10 is “Very Important”.



As well as looking at these figures in their own right, it is important to consider how the results vary according to different respondent criteria (including age, gender, location and working status). In the table below, we have firstly noted the overall mean rating achieved for each outcome on this 10-point scale. We have then highlighted significant variations by respondent category with higher levels of importance being shaded green and lower levels of importance being shaded red.

Outcome ¹	Mean Rating on 10-point scale	Significant Positive Variation ²	Significant Negative Variation
Reduced cost of living in Shetland	9.13		
Preservation and enhancement of Shetland's natural environment	8.78	Not able to work due to health reasons (9.60)	
More younger people wanting to stay and / or come back to Shetland	8.72		
Reduced poverty and inequality	8.71	Not able to work due to health reasons (9.25)	
Improved housing supply and affordability	8.71		
Shetland being more self-sufficient in things like food, other goods and services	8.52		
Better transport links within and between communities	8.47	North Isles (9.21); Outer Isles (9.50)	
Improved performance of Shetland's economy	8.39		Bressay (7.15)
Better broadband and / or mobile phone connections	8.34	Age 55-64 (8.84)	
Improved physical and mental health and wellbeing	8.22	Burra and Trondra (8.95)	Bressay (7.65)

¹ Base number of responses for each element varies from 1,236 to 1,279

² Variations of 0.5 or greater on the 10-point scale are included and only when the subset of the sample is 20 respondents or greater.

Outcome ³	Mean Rating on 10-point scale	Significant Positive Variation ⁴	Significant Negative Variation
Greater participation in community life	7.34	Outer Isles (8.05); Working part-time (7.88)	
Improved arts, cultural, sports and recreation opportunities	6.74	16-24 (7.30)	

It is noted that there are only marginal variations according to respondent criteria and the lack of such significant variations suggest that these views are held generally across the Shetland population, albeit there are some modest variations (and there are other variations but either to a lesser extent than the 0.5 on the 10-point scale we have noted or in smaller subsets of the overall sample).

Relative Importance of Key Outcomes

A separate approach to discriminate between the potential outcomes is to consider their **relative** importance. Respondents were therefore asked, from the same list, to choose the three things that they thought were MOST IMPORTANT. These results are shown over the page.

These figures highlight the particular importance ascribed to reducing the cost of living in Shetland, with 67% placing this in their “top three” most important issues. Two other issues (housing supply and affordability and maintaining and attracting back younger people) have a majority of respondents placing the issue in their “top three” (57% and 50% respectively doing so) and a number of issues (relating to environment, transport, broadband, self-sufficiency, poverty & inequality, economy and health & wellbeing” have a significant minority of between 33% and 46% placing the issue in their “top three”.

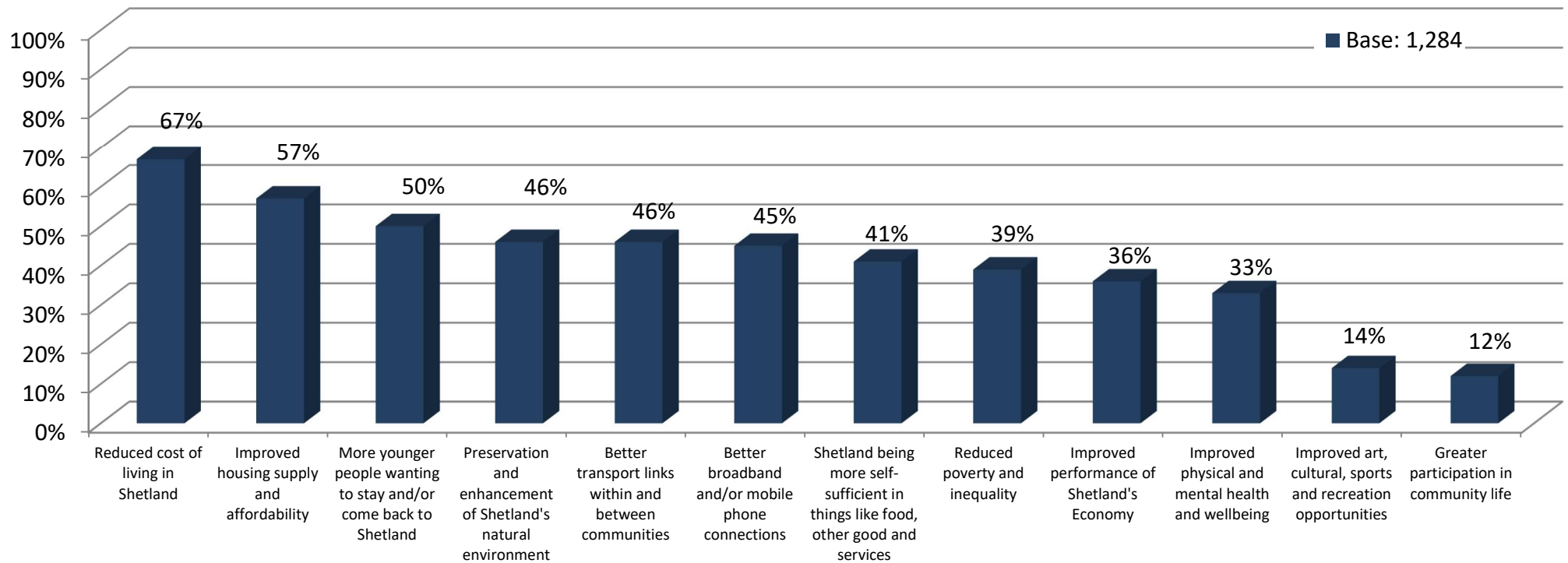
It is notable that comparatively few respondents place improved arts, cultural, sports and recreation opportunities, or greater participation in community life in their “top three” (only 14% and 12% respectively).

³ Base number of responses for each element varies from 1,236 to 1,279

⁴ Variations of 0.5 or greater on the 10-point scale are included and only when the subset of the sample is 20 respondents or greater.

Community Consultation - Relative Importance of Key Outcomes (% Ranking in Top Three Most Important)

Please choose up to three of these things that are MOST IMPORTANT to you.



The variations in relation to this question are set out below and on the following page, firstly in terms of the overall proportion of respondents choosing the issue in their top three and then with positive and negative variations noted.^{5 6}

Outcome	% ranking as Top Three Most Important	Significant Positive Variation	Significant Negative Variation
Reduced cost of living in Shetland	67%		Bressay (33%)
Improved housing supply and affordability	57%		North Isles (47%); East Mainland (41%); Whalsay (38%)
More younger people wanting to stay and / or come back to Shetland	50%	North Isles (60%); Outer Isles (75%)	Not able to work due to health reasons (33%)
Preservation and enhancement of Shetland's natural environment	47%		Bressay (29%); Burra and Trondra (37%)
Better transport links within and between communities	46%	North Isles (75%); Outer Isles (85%); Whalsay (69%); Bressay (67%)	Not able to work due to health reasons (36%)
Better broadband and / or mobile phone connections	44%	55-64 (55%); East Mainland (56%); North Isles (65%); Outer Isles (85%)	Lerwick (34%)
Shetland being more self-sufficient in things like food, other goods and services	41%	Bressay (62%)	Outer Isles (25%)
Reduced poverty and inequality	39%	Not working due to health reasons (50%); Bressay (57%)	
Improved performance of Shetland's economy	36%	Scalloway (49%)	35-44 (26%)

⁵ The base number of responses for this question was 1,291

⁶ Variations of 10% or greater are noted and, again, only when the subset of the sample is 20 or greater.

Outcome	% ranking as Top Three Most Important	Significant Positive Variation	Significant Negative Variation
Improved physical and mental health and wellbeing	33%		
Improved arts, cultural, sports and recreation opportunities	14%	25-34 (25%)	
Greater participation in community life	12%	Bressay (29%)	

There are some apparent and significant variations here, most apparently in relation to transport, broadband and keeping and attracting back young people with these issues being significantly more important to respondents from the North Isles, Outer Isles and other, primarily non-mainland, communities.

Open-Ended Questions

The consultation also included a number of open-ended questions and invitations to comment, as follows:

What do you most like about Shetland?

What do you think are the challenges for Shetland in the future?

Comment on any major issues that you think are missing from the above list (referring to the response options to the quantitative questions). You can also use this space to put forward specific ideas for new projects or initiatives.

Further comments about how the Viking Community Fund should be used for the benefit of Shetland.

The comments have been captured in full and have been checked / edited by IBP to create a full listing of verbatim comments. This document is available on request. We have also coded the comments for each question into common categories and, in the remainder of this section, we summarise the main themes to emerge from this coding exercise.

What do you like about Shetland?

The main themes to emerge from our coding of the open-ended comments in relation to this question were:

- Sense of community as a key element of what people value about Shetland (referenced in 49% of responses to this question).
- Shetland's natural environment similarly being a key factor (also referenced in 49% of the comments made in relation to this question).
- Feeling of safety (referenced in 36% of responses).

These themes of community, environment and safety were very apparent in the responses to this question, with other themes being much less commonly mentioned.

What do you think are the challenges for Shetland in the future?

The most common themes to emerge from our coding of the open-ended comments in relation to this question were:

- Quality of transport links within and between communities (referenced in 36% of comments in response to this question).
- Challenges for Shetland's economy (referenced in 31% of comments).
- Preservation and enhancement of Shetland's natural environment (referenced in 23% of comments).
- High cost of living (referenced in 25% of comments).
- Housing issues (referenced in 20% of comments)
- Encouraging young people to stay and / or come back to Shetland (referenced in 18% of comments).

Our assessment of these comments suggests that they match closely with the issues that were explored in the initial qualitative research and included in the quantitative themes noted above. One particular issue to note is that the proportion of comments that relate to the economy is particularly high - this reflects the extent to which economic issues are bound up with the various other issues noted (including transport, cost of living, housing and retaining young people).

Major issues missing from the above list and / or specific ideas

Many of the comments made in relation to this question were restatements of issues raised previously or of issues covered in the quantitative questions (in particular, 18% of comments made in response to this question referenced transport links and 15% referenced cost of living issues).

A relatively small number of specific project ideas were collated and these were widely spread across themes (again, this information is contained within the supporting material made available to SCBF and which is available on request).

Further comments about how the Viking Community Fund should be used for the benefit of Shetland

Again, a number of the comments here were essentially restatements of comments that had already been made, with general assertions typically being made about ensuring that the funds are used to benefit communities and, quite commonly, that everyone should benefit (22% of comments referenced this issue in some way).

A specific issue here was that reference was commonly made to the geographical areas that people felt should be prioritised (31% of the comments made referenced this theme in some fashion). Commonly, these comments referred either to there being particular priority accorded to those geographical areas perceived to have been most impacted by the Viking Energy Wind Farm, and to prioritisation of more remote areas.

A particularly common theme was that there should be an emphasis on addressing cost of living issues (30% of comments made in response to this question referenced this issue in some way).

5. BUSINESS SURVEY FINDINGS

Overview

The business survey was initially circulated online by partners and was also made available for completion through the information on the various surveys that was posted on the SCBF website. This generated a limited response of 19 completions and so IBP undertook further telephone contact using business contact details harvested from publicly available sources. 54 interviews were conducted in this way, leading to a total of 73 business responses. The results set out herein are based on those responses. Given the relatively small base numbers when the results of this survey are broken down to sub-group level, we have commented below only on the results for businesses as a whole. Again, data tables that break down responses by respondent criteria, and a full listing of open-ended questions is available on request.

Perceived Importance of Key Outcomes

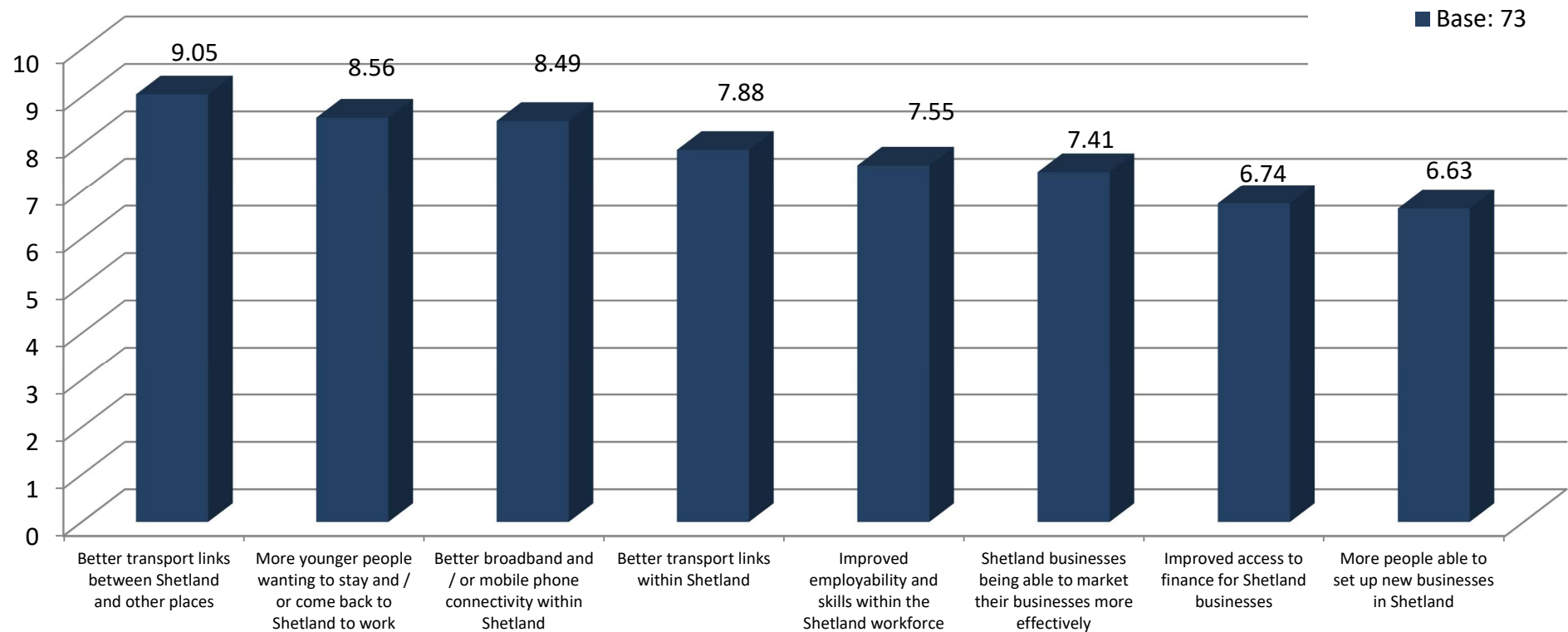
A refined and edited set of potential outcomes was prepared for the business survey and business survey respondents were asked, firstly, to indicate how important they considered each of these issues to be to **Shetland's businesses and economy** on a scale of 1 to 10 where 1 was "not at all important" and 10 was "very important". The results of this are shown over the page.

On average, the highest level of importance was ascribed to better transport links between Shetland and other places with this achieving a mean rating of 9.05 on the 10-point scale. Two other issues followed fairly closely behind, being more younger people wanting to stay and / or come back to Shetland to work and better broadband and / or mobile phone connectivity within Shetland (with a mean rating of 8.56 and 8.49 respectively).

A somewhat lower level of importance was ascribed to each of transport links within Shetland (mean rating of 7.88 on the 10-point scale), improved employability and skills within the Shetland workforce (7.55) and Shetland businesses being able to market their businesses more effectively). On average, the issues of improved access to finance for Shetland businesses and more people able to set up new businesses in Shetland were less likely to be seen as important (with a mean rating of 6.74 and 6.63 respectively, on the 10-point scale).

Business Consultation - Overall Perceived Importance of Key Outcomes (Mean Rating on a 10-point scale)

Please say how important you think each of these things will be for Shetland's businesses and economy generally on a scale of 1 to 10, where 1 is "Not at all Important" and 10 is "Very Important".



Relative Importance of Key Outcomes

As with the community consultation, businesses were asked to indicate the relative importance of these issues, in this case being asked to choose up to three issues that they considered to be most important for Shetland's businesses and the economy generally.

The results of this are shown over the page.

The key standout issue here is better transport links between Shetland and other places, with 77% of business respondents placing this in their to three most important issues, Other issues where a majority of respondents placed the issue in their to three most important issues were in relation to better broadband and mobile phone connectivity within Shetland (59%) and more younger people wanting to stay and / or come back to Shetland to work (52%).

A lower proportion of respondents, though still a significant minority, placed each of better transport links within Shetland and improved employability and skills within the Shetland workforce in their top three most important issues (37% and 33% respectively).

Comparatively few business respondents placed any of Shetland businesses being able to market their businesses more effectively, improved access to finance for Shetland businesses and more people able to set up new businesses in Shetland in their top three most important issues for Shetland's businesses and the economy generally (18%, 16% and 10% respectively).

Open-Ended Questions

The consultation also included a number of open-ended questions and invitations to comment, as follows:

What do you most like about Shetland as a business location?

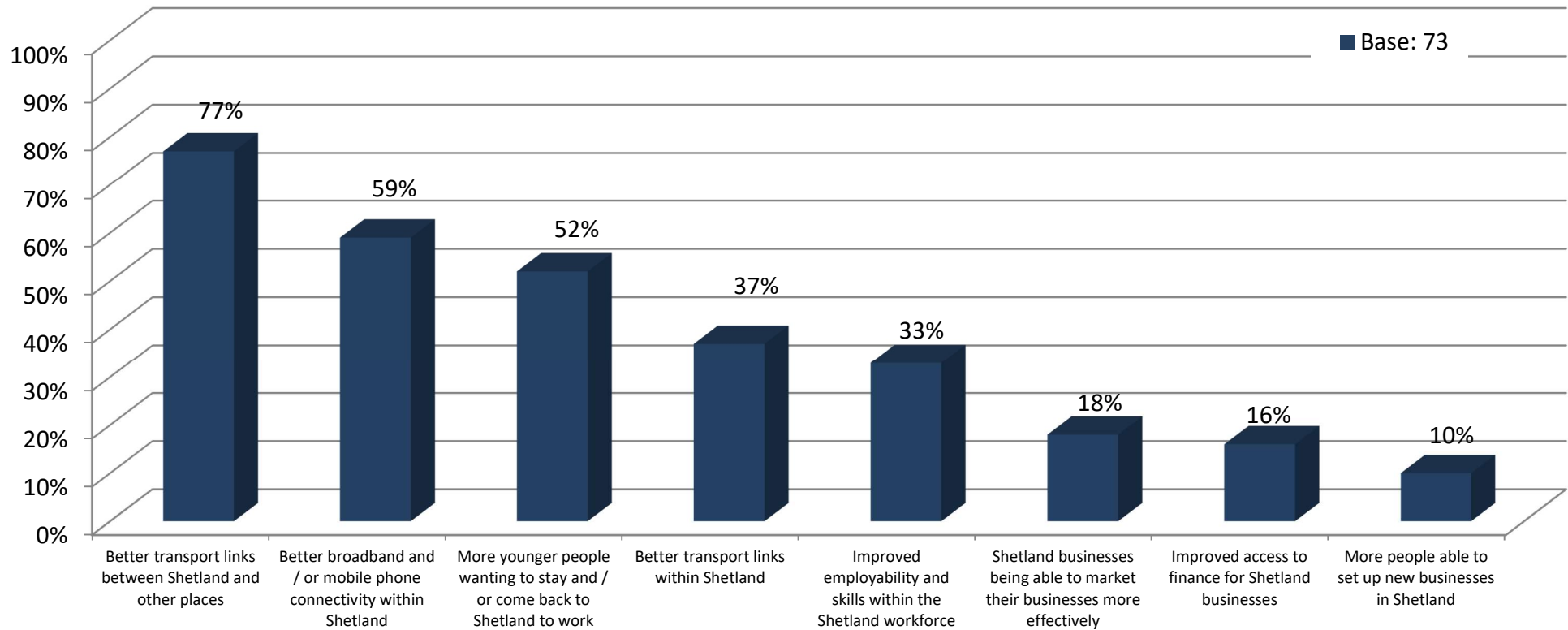
What would you say are the main issues and challenges facing your business in Shetland?

Comment on any major issues that you think are missing from the above list (referring to the response options to the quantitative questions). You can also use this space to put forward specific ideas for new projects or initiatives that you think would benefit Shetland's businesses and economy.

Further comments about how the Viking Community Fund should be used for the benefit of Shetland's businesses and economy.

Business Consultation - Relative Importance of Key Outcomes (% Ranking in Top Three Most Important)

Please choose up to three of these things that you think would be MOST IMPORTANT for Shetland's businesses and the economy generally



As with the community survey, these comments have been captured in full and have been checked / edited by IBP to create a full listing of verbatim comments. This document is available on request. Given the relatively small number of comments, we have not undertaken a formal quantitative coding of these comments but have provided an overview of the key themes below.

What do you most like about Shetland as a business location?

The responses from businesses in relation to this question reflected the importance of “community” as identified in the community survey itself. Businesses often commented on the importance of having a tight-knit local community, that was supportive of local businesses and they stressed the importance of the business community continuing to have a large number of small-scale, local, independent businesses. The lifestyle accorded by being located in Shetland was a key factor for many business respondents.

Access to raw materials was a specific factor that was commonly mentioned, specifically by fishing industry respondents.

What would you say are the main issues and challenges facing your business in Shetland?

The most common issues referenced as issues or challenges facing businesses included:

- Distance from market and associated costs of this (both in terms of securing raw materials and in terms of getting goods to market).
- Transport issues specifically (this usually referring to transport on and off Shetland including both cost and convenience).
- Labour shortages and attracting people to the industry
- Energy costs.

Some business respondents also made occasional reference to issues such as broadband connectivity and specific competition or other factors within their sector.

Major issues missing from the above list and / or specific ideas

A number of issues and suggestions for projects and initiatives have already been made by businesses, albeit generally sector-specific and framed in general terms. Examples include:

- Facilities to house start-up and micro-businesses, including shared “hubs” and “pop-up” premises.
- Grant programmes focused on sustainability initiatives.
- Specific support for fisheries science initiatives.
- Promoting Shetland’s food and drink.
- Housing-related initiatives to encourage staff recruitment and retention.

Some businesses also raised, in general terms, issues a need for transport improvements including “fixed links”.

Further comments about how the Viking Community Fund should be used for the benefit of Shetland’s businesses and economy

When asked to make further comment about how the Viking Community Fund should be used for the benefit of Shetland’s businesses and economy, some businesses commented on access to grant funding for businesses.

A number of the comments made in relation to this question were restatements of wider issues identified in the community survey that would also support business efforts (such as transport, connectivity, energy costs and retaining the workforce).

6. VOLUNTARY AND COMMUNITY SECTOR SURVEY FINDINGS

The voluntary / community groups survey has had little success despite having been circulated on a number of occasions by relevant partners, with only 13 responses having been received. Given this small base, the results of the survey specifically are of only limited worth but the key points are noted here, for completeness.

Key points from the responses that were received were as follows:

- Key strengths include environment, community, safety and volunteering ethos.
- Access to funding to maintain existing activities is commonly cited as a problem.
- Specific issues of engagement, especially with young people, are commonly noted.

The issues that these respondents saw as being most important are noted below (though the very small base number of respondents should particularly be noted in relation to this question):

- Improved physical health and wellbeing (69% choosing this as one of their three most important priorities).
- Reduced poverty and inequality (69%).
- Reduced cost of living (54%)
- Improved housing supply and affordability (46%)
- Improved arts, cultural, sports and recreation opportunities (46%)
- Improved performance of Shetland's economy (46%).

Whilst issues pertaining to poverty and inequality cost of living, housing supply and affordability and, at least indirectly, the performance of Shetland's economy rank high in the community consultation, this is not so for health and wellbeing, and arts, cultural, sports and recreation opportunities; this most likely reflects the particular focus of the specific groups that responded.

This is also reflected in the ideas and suggestions made by these respondents, which generally relate to funding of specific projects of relevance to the area of interest of the group concerned (though a small number of other suggestions have been made, relating, for example, to travel grants).

7. ISSUES TO CONSIDER

The purpose of this document has been to collate the key findings of different elements of the consultation process in order to help inform their deliberations as to the priorities and outcomes that they would wish to pursue through use of the Viking community Fund. In practice, this will mean consideration of:

- **Priority areas:** this would usually be addressed in thematic terms (e.g. cost of living, connectivity etc.) or in relation to target groups (e.g. young people).
- **Overall outcomes:** this would be a description of the overall changes that Directors would wish to see in relation to each of the priority areas.

It is anticipated that, based on the guidance to be provided by the SCBF Directors, that IBP and the business planning sub-group will work further on the specific wording of these priorities and outcomes and also on the identification of further “subsidiary outcomes”.

A range of inputs from different sources is set out here for consideration by the Directors as well as other detail and contextual information that will be of particular value in the development of the business plan. There is no simple formula for selection of the specific priorities / outcomes and, as noted on a number of occasions within the report, a number of the “outcomes” that have been tested are related to one another and sometimes mutually reinforcing. A key issue for the Directors will be the choice of priorities that best describe the changes they wish to affect in the light of the information contained herein and, in particular, how they would wish to describe these.

We would point to specific feedback and information contained herein, which we believe should be given particular weight:

- The overview of key issues set out in pages 4 to 8 on the qualitative consultations highlights important themes that emerged from a wide range of in-depth, deliberative discussions and so we believe some weight should be accorded to this.
- The relative priorities chart from the community survey that is set out on page 16 provides a very clear view of the priorities of Shetland people for use of the Fund.
- The similar relative priorities chart from the perspective of businesses as set out on page 24 provides a clear picture of priorities from the perspective of businesses.

Assessment of these inputs, along with the wider content set out herein, should assist the Directors to consider the “space” in which they wish the Fund to operate.

In doing so, we would suggest that the guidance provided by the data set out be accompanied by consideration of certain other factors. Specifically:

- Whether the Directors consider that the potential activities implied by the choice of outcome are distinct from what is already delivered by other funders and partners.
- Whether the Directors believe that there are actions that they can take through the Fund to make a meaningful difference within that priority / outcome area, having regard to issues such as the nature and scale of the issue (the short section on “how the fund should intervene” on page 7 should be considered in this regard).

Finally, we believe it would be appropriate for the Directors to focus on a relatively narrow range of priorities to allow for focused effort, with these choices taking account of the above points.

SUPPORTING MATERIAL

Survey Questionnaires

The survey questionnaires for each of the three surveys reported on herein (community, business, voluntary and community sector) can be accessed below.



Community Survey
Questionnaire.pdf



Business Survey
Questionnaire.pdf



Voluntary Survey
Questionnaire.pdf

Data Tables

Data tables for the community survey can be accessed below. It should be noted that not all respondents answered each question and that the base number of responses to each question therefore varies. It should also be noted that sub-groups of the sample with fewer than 20 cases have been removed to ensure that individual respondents cannot be identified from the data,



Community Survey
Data Tables.pdf

Due to the smaller sample sizes for the business and voluntary / community sector surveys, we have not provided further breakdowns of results to ensure that individual respondents cannot be identified from the data. The overall quantitative findings from each of these surveys are described in the main body of the text.

Open-Ended Comments

A full listing of open-ended comments from each survey can be accessed below.



Community Survey
Comments.pdf



Business Survey
Comments.pdf



Voluntary Survey
Comments.pdf

It should be noted that, in each case, we have removed and / or redacted a small number of comments which allowed for identification of the respondent or which were offensive or abusive in nature. All comments, including those that have been removed or redacted from the documents below, were included in our coding of the comments.