

Development Plan Monitoring Report (January 2005)

Structure Plan Key Issues

A DECLINING POPULATION

Structure Plan Vision for 2016 – The gradual decline in the population of Shetland has been reversed through increased economic opportunity throughout Shetland, the continued promotion of social inclusion, the retention of an outstanding natural environment, continued sustainable improvements to public assets and the provision of affordable housing for all sectors of society.

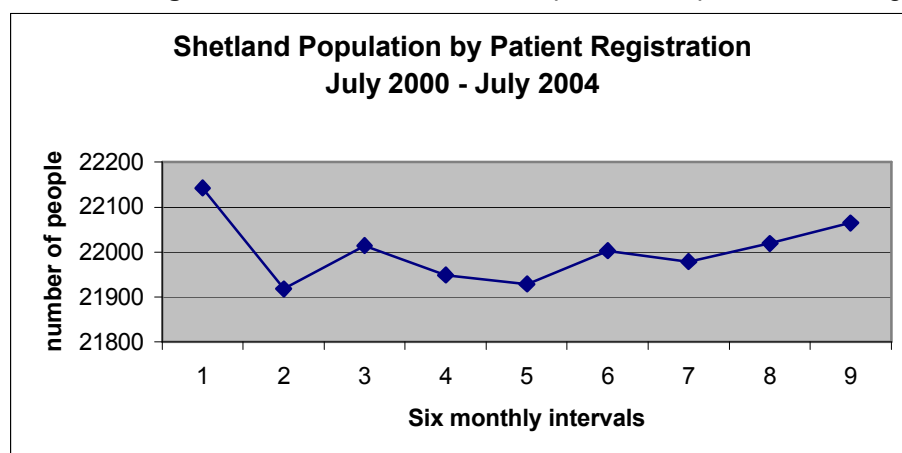
NHS Shetland holds information on the number of patients registered at each GP practice in Shetland. The figures give an indication of the population trends by area and by age. It should be noted that “Health Board” records are good for representing current trends, but they should not be used as accurate surrogate population data for specific points in time, due to the lag-times involved in registering or deregistering patients.

The figures indicate that overall **the population has decreased by 75 in the first four years** of the Structure Plan period.

All Patients by Practice

Date	Yell	Whalsay	Hillswick	Brae	Walls	Bixter	Levenwick	Scalloway	Lerwick	Unst	TOTAL
01/07/2000	1034	1093	699	2444	685	1035	2234	2580	9622	716	22142
01/01/2001	1058	1089	688	2388	687	1032	2185	2543	9586	662	21918
01/07/2001	1061	1097	675	2388	682	1024	2214	2580	9641	652	22014
01/01/2002	1049	1087	671	2388	678	1039	2230	2565	9598	644	21949
01/07/2002	1036	1094	671	2358	672	1045	2200	2591	9590	672	21929
01/01/2003	1040	1106	674	2388	652	1053	2195	2620	9592	683	22003
01/07/2003	1040	1096	676	2475	664	1047	2534	2713	9061	673	21979
01/01/2004	1031	1097	668	2468	664	1059	2584	2761	9016	671	22019
01/07/2004	1030	1104	671	2470	679	1079	2594	2772	9011	654	22064
01/01/2005	1019	1091	677	2450	693	1081	2596	2790	9031	639	22067
Change	-15	-2	-22	+6	+8	+46	+362	+210	-591	-77	-75

Note: 02-03 figures unusual because Lerwick practice cut patients not living in the Town



Using this figure as an historical measure would not be appropriate because prior to 2002/03, Lerwick Health Centre accepted registrations from patients living outwith the practice area. This change in registration requirements accounts for the substantial change in the number of patients registered at Levenwick, Scalloway and Lerwick in the four year period. Residents in Gulberwick and Quarff still registered at the Lerwick Health Centre.

In January 2005, the percentage of total Shetland patients registered at Lerwick and Scalloway was 53.5%.

This figure can be used as a base indicator to assess the size and magnitude of the drift of population towards the Central Area.

Age Structure

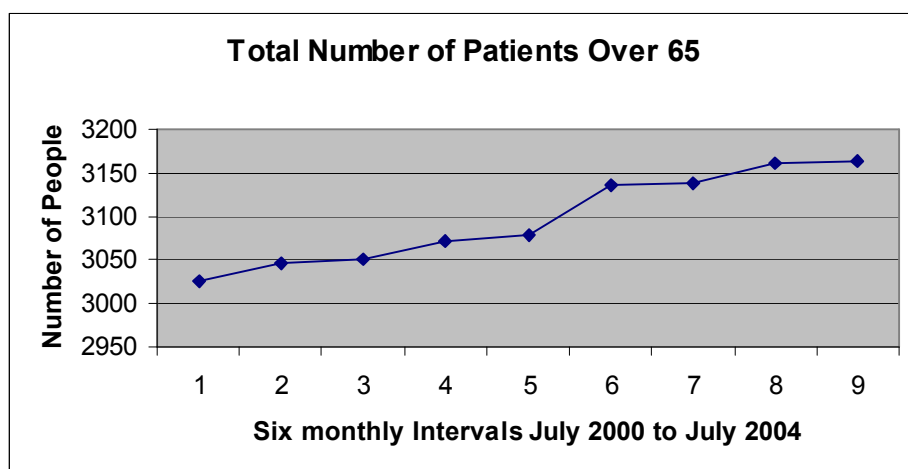
Over 65s

The following table and graph show that the number of patients **over 65 is increasing in all areas except Hillswick. During the Structure Plan period, the number of people over 65 has increased by 178 people.** The changes in the Lerwick Health Centre registration appear to have little impact except possibly in Levenwick.

Number of Patients Over 65 by Practice

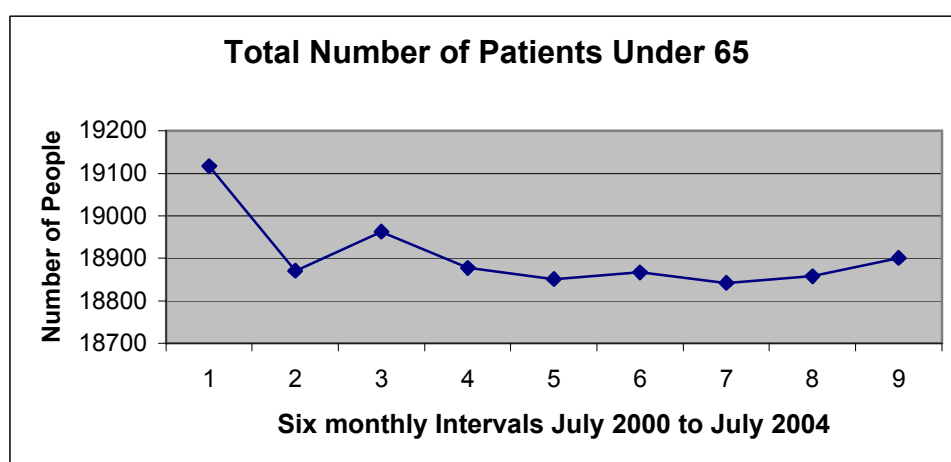
	Yell	Whalsay	Hillswick	Brae	Walls	Bixter	Levenwick	Scalloway	Lerwick	Unst	TOTAL
01/07/2000	213	158	126	227	108	147	322	417	1205	102	3025
01/01/2001	219	159	126	230	112	147	324	415	1215	100	3047
01/07/2001	216	165	125	232	113	151	324	407	1214	104	3051
01/01/2002	219	164	124	236	115	148	320	410	1231	104	3071
01/07/2002	221	167	126	235	108	149	326	406	1234	106	3078
01/01/2003	227	178	121	236	108	157	339	412	1249	109	3136
01/07/2003	234	173	120	250	107	153	369	412	1210	109	3137
01/01/2004	225	178	123	251	108	155	385	417	1215	104	3161
01/07/2004	224	182	117	256	107	155	384	421	1212	105	3163
01/01/2005	216	185	116	256	116	158	382	420	1247	107	3203
Change	+3	+27	-10	+29	+8	+11	+60	+3	+42	+5	+178

Note: 02-03 figures unusual because Lerwick practice cut patients not living in the Town



Under 65s

The number of people under 65 has declined by 253 people over the monitoring period. The sizable increase in the figures for Levenwick and Scalloway, and the decrease in Lerwick are judged to be as a result of the Lerwick Health Centre registration changes. Taken together there is an overall decline of 98 people aged below 65 in the Lerwick, Scalloway and Levenwick areas, this is 39% of the total Shetland decline of 253 under 65 year olds.

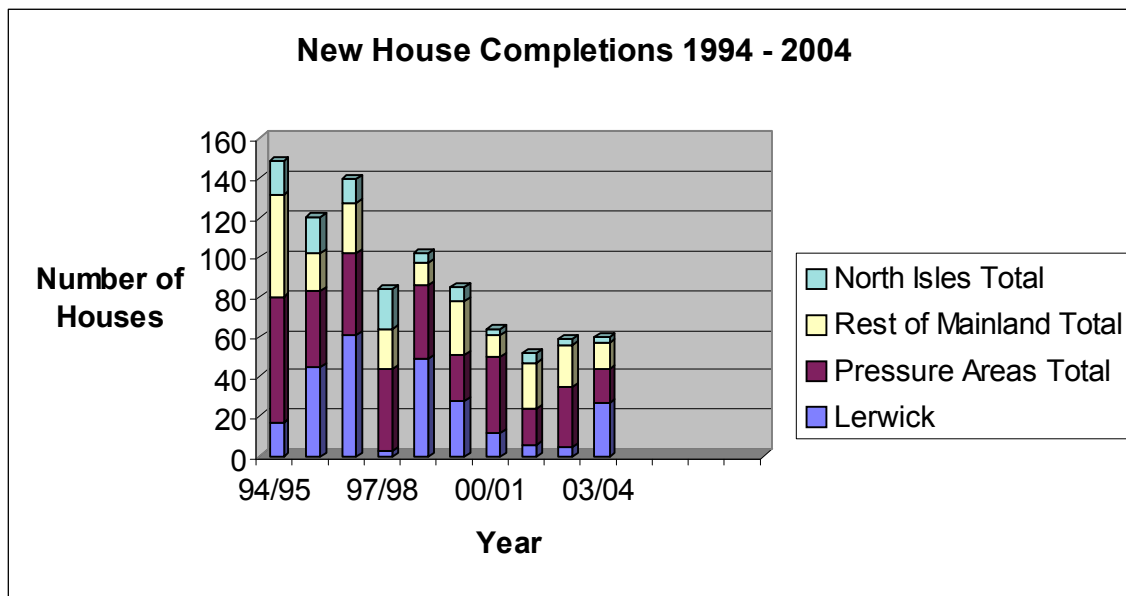
**Number of Patients Under 65 by Area**

Date	Yell	Whalsay	Hillswick	Brae	Walls	Bixter	Levenwick	Scalloway	Lerwick	Unst	TOTAL
01/07/2000	821	935	573	2217	577	888	1912	2163	8417	614	19117
01/01/2001	839	930	562	2158	575	885	1861	2128	8371	562	18871
01/07/2001	845	932	550	2156	569	873	1890	2173	8427	548	18963
01/01/2002	830	923	547	2152	563	891	1910	2155	8367	540	18878
01/07/2002	815	927	545	2123	564	896	1874	2185	8356	566	18851
01/01/2003	813	928	553	2152	544	896	1856	2208	8343	574	18867
01/07/2003	806	923	556	2225	557	894	2165	2301	7851	564	18842
01/01/2004	806	919	545	2217	556	904	2199	2344	7801	567	18858
01/07/2004	806	922	554	2214	572	924	2210	2351	7799	549	18901
01/01/2005	803	906	561	2194	577	923	2214	2370	7784	532	18864
Change	-18	-29	-12	-23	0	+35	+328	+207	-633	-82	-253

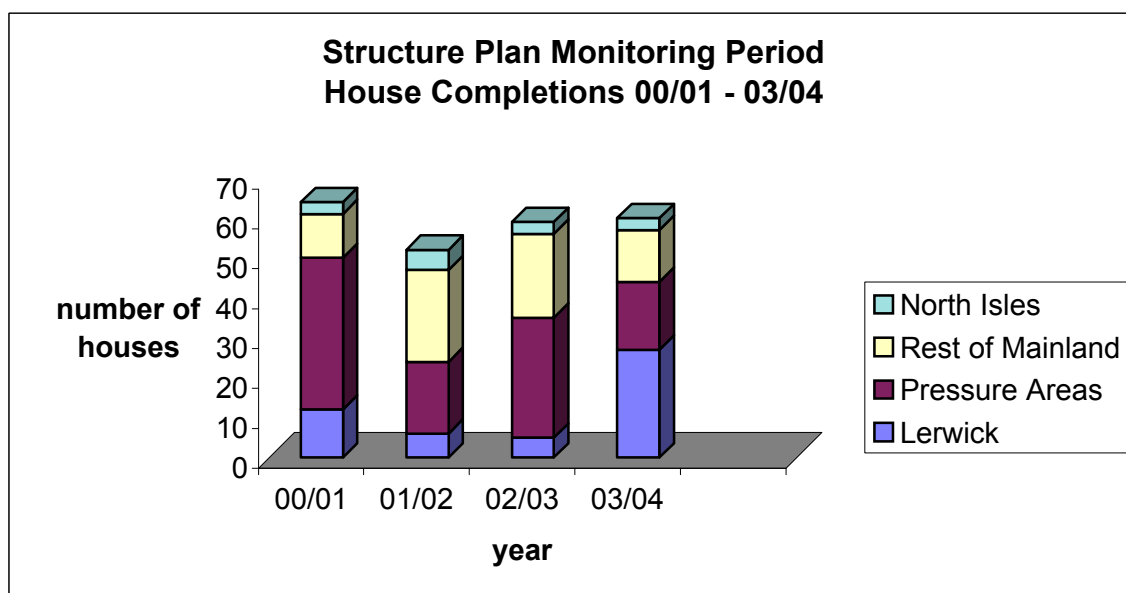
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Housing Needs

Structure Plan Vision for 2016 – Local Communities have benefited from new households helping them to retain essential services and facilities.



The graph above shows that new house completions have reduced by half in the past ten years. The completion information below clearly illustrates the dominance of Lerwick and the pressure areas. For Structure Plan purposes the Pressure Areas are defined as; Bressay, Burra and Trondra, Gulberwick, Quarff and Cunningsburgh, Sandwick, Scalloway, Tingwall, Whiteness and Weisdale Community Council areas.



House building in the North Isles remain fairly constant with an average building rate of four new houses per year.

In 2003/04 a total of 60 new houses were completed; of those, 27 were in Lerwick (22 at the Observatory) and 33 outwith. This gives a Lerwick / Rural percentage split of 45/55.

Seventeen of these new homes were in the Pressure Areas. Lerwick and the Pressure Areas together account for 73% of new housing and the remainder of Shetland accounts for 27%.

House completions

Shetland Mid-year House Completions 00/01 – 03/04

	00/01	01/02	02/03	03/04
Lerwick	12	6	5	27
Pressure Areas Total	38	18	30	17
Bressay	1	0	0	2
Burra and Trondra	0	2	9	1
Gulberwick, Cunningsburgh and Quarff	6	8	13	7
Sandwick	0	2	0	1
Scalloway	23	0	0	0
Tingwall, Whiteness and Weisdale	8	6	8	6
Rest of Mainland Total	11	23	21	13
Delting	5	7	6	3
Dunrossness	2	4	5	2
Nesting and Lunnasting	0	2	3	2
Northmavine	1	2	3	2
Sandsting and Aithsting	1	4	4	2
Walls and Sandness	2	4	0	2
North Isles Total	3	5	3	3
Fetlar	0	0	0	0
Unst	0	0	0	0
Skerries	1	0	0	0
Whalsay	1	2	3	3
Yell	1	3	0	0

Vibrant Communities

The building of new houses does not in itself sustain a community. An additional measure used to judge the vitality of local communities is the number of Local Community grants awarded by the Council's Community Services Department.

In the six months from June to December 2004 under the recently revised grant scheme, **178 grants** for development, capital, support, feasibility or maintenance projects and purposes were awarded.

The distribution of these grants is shown below.

Grants awarded by Community Services Department June – Dec. 2004

Community Council Area	Number of Grants awarded
Shetland wide organisations	68
Bressay	-
Burra and Trondra	1
Delting	15
Dunrossness	6
Fetlar	1
Gulberwick, Quarff and Cunningsburgh	8
Lerwick	20
Nesting and Lunnasting	9
Northmaven	4
Sandsting and Aithsting	4
Sandwick	4
Scalloway	4
Skerries	-
Tingwall, Whiteness and Weisdale	5
Unst	6
Walls and Sandness	5
Whalsay	11
Yell	8

New Building

Between April 2004 and March 2005, **five new non-residential buildings** were added to the Valuation Roll.

They are;

- 1 – Church, Tingwall
- 1 – Factory, Scalloway
- 1 – Marina, Cunningsburgh
- 1 – School, Nesting
- 1 – Workshop, Lerwick

A FRAGILE ECONOMY

Structure Plan Vision for 2016 – Shetland’s existing settlements can offer a wide range of land and business premises for both new industry and the expansion of existing industry.

The rural economy has reacted to the demands of the highly competitive global economy by embracing the need to diversify, developing local supply networks, identifying and successfully exploiting niche markets and adding value to their products.

Shetland has managed to build on its educational successes enabling all sectors of the Shetland population to have easy access to life-long learning.

The Value of Key Sectors in the Shetland Economy

Shetland in Statistics gives 'the Value of Key Sectors of the Shetland Economy', but this information can be a year or two out of date.

In the 2004 edition, the following figures for 2002 are published.

Oil	£ 65.0m
Fisheries	£208.2m
Agriculture	£13.1m
Knitwear	£3.0m
Tourism	£12.6m
SIC	£133.4m

The Shetland Enterprise annual report gives a figure for the number of Business Starts. In the 2003/04 Annual Report, the number of **New Business Starts was 31**.

The Scottish Executive's Neighbourhood Statistics give the **total number of business sites in 2003 as 1545**.

Vacant Commercial Properties

The Assessor's records provide information on the number and % of vacant properties (including shops), in each parish. This information gives a picture of the level of economic activity throughout Shetland.

Number and % of Vacant Commercial Properties (including Shops) by Parish December 2004

Parish	Number of Vacant Commercial Properties	Total Commercial Properties	% Vacant
Unst	7	103	7
Yell	12	141	9
Fetlar	2	26	8
Northmavine	8	99	8
Delting	5	143	3
Walls and Sandness	7	83	8
Sandsting and Aithsting	3	91	3
Nesting and Lunnasting	3	47	6
Whalsay and Skerries	0	88	0
Tingwall	12	241	5
Bressay	0	25	0
Gulberwick and Quarff	1	20	5
Burra	0	43	0
Dunrossness	12	262	5
Lerwick	50	945	5

Resident Employment Rate

The "Local Economic Forum Profile" published by Futureskills Scotland provides an overall indication of employment in Shetland. The profile for spring/summer 2004, gives the

following information: “Resident employment in Shetland in 2003/2004 was 11,000, an increase of 1,000 (ten per cent) since 2000/2001, compared with a one per cent increase across Scotland as a whole. This represents **a resident employment rate of 84 per cent.**”

NATURAL ENVIRONMENT

Structure Plan Vision for 2016 – Shetland’s natural environment has become a key priority for the Shetland community with the interdependence of the economy and the health of the environment clearly recognised.

Local communities have taken the leading role in regenerating their areas via the Council’s Local Agenda 21 process, including the constantly evolving Biodiversity Action Plan.

The Structure Plan vision for 2016 sees recognition of the value of the natural environment increasing and the interdependence with the economy recognised. The measure selected to monitor this is the number of Local Community **Biodiversity** Action Plans prepared. In December 2004, information provided by the LBAP officer states that **five community action plans have been prepared.**

The **Eco Schools** programme, a Europe-wide school based programme promoting environmental awareness, citizenship and personal, social and health education is seen as a good indicator of environmental awareness amongst “the next generation” i.e. the school pupils. In December **25% of schools in Shetland were accredited Eco schools** with 80% of Shetland schools registered on the programme.

Shetland in Statistics provides information about agricultural land use, the **area of tillage** (cultivated land) has been identified as a useful indicator. An increase in the number of hectares used for tillage indicates an increase in the general level of agricultural activity. **In 2003, 400 hectares were used for tillage**, the figure for 2001 was 437 hectares, so there has been a decline in agricultural activity over the Structure Plan monitoring period.

It is intended that work will be undertaken to assess the number of planning applications (both commercial and domestic) submitted and approved **below the 5 metre contour**. The information will be extracted from the FastPlanning database. The information will indicate whether or not developers are acknowledging the message of rising sea levels.

Another available measure of care for the natural environment, is the number of instances of pollution or “pollution events” (i.e. an incident) requiring a response from SEPA. From January to December 2004, the number of **pollution events** recorded by SEPA was as follows.

Air 13
Land 5
Water 24

BUILT ENVIRONMENT

Structure Plan Vision for 2016 – The standard of design in Shetland is now a central issue to the consideration of new development. Shetland had continued to find innovative new uses for its traditional buildings, thereby reducing the need for new build. The promotion of Shetland’s outstanding archaeological and built heritage has been considerably enhanced through improved visitor facilities and attractions.

The “Shetland House” was published in early 2005 by the Planning Service. Its primary purpose is to help anyone building a house to navigate their way through the many procedures involved. However, it also seeks to encourage a high quality of design and siting. The document has been placed on the Planning Service website and the average number of “hits” per month on the website has been identified as a measure of interest in the document. In the period from August to November 2004, the monthly average number of “hits” on **The “Shetland House” website was 509**. The number of hard copies printed and distributed could also be used as a measure after the first print run.

The number of Shetland properties recorded by the Scottish Civic Trust on the “**Buildings at Risk Register**” for 2004 was **24**.

To help preserve and enhance Shetland’s built heritage and landscape, the budget committed by the Council to the **Conservation Grant Scheme in 2004/5 was £91,785**.

The number of Listed Building Consent applications made during the monitoring period has remained fairly constant with a downturn in 2003. The figures **for Listed Building Consent applications** recorded in FastPlanning are as follows:

2001	29
2002	32
2003	18
2004	32

Shetland Amenity Trust maintains the Shetland Sites and Monuments Record. The information published in the 2004 edition of *Shetland in Statistics* gives the current number of **recorded archaeological sites as 7014**.

PERIPHERALITY

Structure Plan Vision for 2016 – Shetland has embraced new technology to combat the negative effects of peripherality and population sparsity on further economic development. Transport links to the UK Mainland have been strengthened and made more affordable for business and the local community.

Broadband and Video Conferencing can both help reduce Shetland’s peripherality. Broadband very simply means a high-speed connection to the Internet with a much larger capacity to send and receive electronic data. Broadband is being “rolled-out” in Shetland as local telephone exchanges are upgraded to provide the service. **In December 2004**,

5.9% of the telephone exchanges in Shetland were enabled. (Updated information awaited from BT)

Sea Transport links to the Mainland have strengthened. In 2000, P&O operated the ferry service to Aberdeen with departures to Lerwick on weekdays. From Lerwick there were six sailings per week, with two sailings via Orkney in the summer months and one in the winter.

In 2005, Northlink Ferries operate the service providing a daily sailing to and from Aberdeen, with three southbound and four northbound sailings calling at Kirkwall. From November to March sailings via Orkney are reduced by one.

In January 2005, Northlink's published freight rate for a self-propelled vehicle going from Lerwick to Aberdeen was £38.95/m. The cost of an adult single fare to Aberdeen (excluding cabin accommodation) is £19.80 (low) and £30.30 (peak).

Air Fares continue to fluctuate and remain high. In 2004, there were scheduled direct flights from Sumburgh to Aberdeen, Inverness (with 1 stop), Edinburgh, Glasgow (with 1 or 2 stops), Kirkwall and Wick.

The cheapest fares for (a) a long weekend booked six months in advance and (b) a midweek trip booked at one week's notice to the following destinations was as follows. The '% change' figure refers to the difference between May 2004 and January 2005.-

Long weekend

Destination	May 2004	September 2004	January 2005	% change
Aberdeen	£100	£103	£102	+2%
Edinburgh	£228	£231	£230	+1%
Glasgow via Aberdeen	£160	£169	£210	+24%

Mid-week trip

Destination	September 2004	January 2005	% change
Aberdeen	£183	£217	+15%
Edinburgh	£347	£323	-7%
Glasgow via Aberdeen	£347	£346	-0%

INTEGRATED TRANSPORT

Structure Plan Vision for 2016 – Shetland's reliance on the private car has been substantially reduced through the introduction of an integrated public transport system. Improvements to the existing road network have enhanced access to the rural areas and the safety of all road users is the Council's highest transport priority. More people now have the opportunity to work locally, or from home using video and computer network.

Measurable indicators of integrated transport are suggested as being a decrease in the number of licensed private cars and light goods vehicles in Shetland and an increase in public transport usage through taxi numbers and bus passengers.

Vehicle Usage

Shetland in Statistics states that there were 11,430 licensed private cars and light goods vehicles in 2003, a rise of 1052 since 2000.

The number of taxis has fallen by two over the past five years and the number of bus passengers has increased by 2%.

	Taxis and private hire cars:-	
2001	77	56
2002	79	50
2003	76	53
2004	77	54

Internal Transport Usage

Bus passengers:-

2001	383360
2002	390306
2003	388720
2004	391125

Inter-island Ferry Usage

The number of vehicles and passengers on the inter-island ferries continue to increase.

Passangers

Ferry Route	2001	2002	2003	2004
Yell	192661	203082	221923	231249
Unst/Fetlar	110688	124501	129452	145350
Bressay	180675	206282	194512	212957
Whalsay	138327	146253	141497	154350
Total	622351	680118	687384	753123

Vehicles

Ferry Route	2001	2002	2003	2004
Yell	110889	107160	117130	123604
Unst/Fetlar	56459	62553	67246	79808
Bressay	58829	70451	68782	71230
Whalsay	62748	66878	66373	72885
Total	278925	307042	319531	350177

External Transport

Ferry Services

Usage of Ferry Service from Lerwick to Aberdeen

Year	Single Passenger Journeys	Accompanied Car Journeys
2002 (Oct – Dec)	11644	2827
2003	83146	15341
2004	97924	16510

Air Services

The number of passengers on scheduled fixed wing flights using Sumburgh Airport has decreased by 8% over the Structure Plan monitoring period.

Passengers on Fixed Wing Scheduled Flights from Sumburgh Airport

Year	Number of Passengers
2001	112146
2002	112661
2003	105530
2004	102861

Road Safety Statistics

Shetland has adopted the casualty reduction targets recommended by the Government and Scottish Executive. Although outwith the current Structure Plan monitoring period, the baseline for these reductions, has been set as the average number of casualties over the 5 years 1994 to 1998. The targets for 2010 are:-

- Reduce by 40% the number of people killed or seriously injured (KSI) in road crashes.
- Reduce by 50% the number of children killed or seriously injured in road crashes.
- Reduce by 10% the number of people slightly injured in road crashes per 100 million vehicle kilometres.

Baseline Figures

Year	Fatal	Serious	Slight	Total
1994	5	20	45	70
1995	4	20	80	104
1996	1	21	49	71
1997	5	21	53	79
1998	0	21	65	86

Plan Monitoring Period

Year	Fatal	Serious	Slight	Total
2000	4	6	38	48
2001	3	13	34	50
2002	2	13	25	40
2003	2	5	42	49
2004				

Year	KSI	Children KSI	Slight
Average number of casualties per year between 1994 and 1998 (Baseline for target reductions) (KSI killed/seriously injured)	23.6	3.6	58.4

Video Conferencing has been around for sometime, and is now gaining in popularity. It cannot replace person to person completely, but in many situations being able to see and hear remote co-workers, does improve communication and cut down on travel time and costs. The applications for enhanced education and learning are enormous. This method of communication is one of the tools used by the University of Highlands and Islands. **Usage of the UHI Video Conferencing Bridge in the academic year 2003/04 was 2461.**

The Council is also embracing this technology. In December 2004, **the Council operated 14 Video Conferencing Points** in its schools and offices.

WATER AND DRAINAGE

Structure Plan Vision for 2016 – The creation of a clear settlement strategy has allowed sufficient infrastructure to be built to meet the demands of human activity. The construction of new wastewater treatment plants has significantly reduced pollution into the surrounding environment and the health of the Shetland population has been safeguarded with improvements to the fresh water supplies.

Scottish Water has invested £? millions of pounds (waiting for info from Scottish Water) in Shetland during the monitoring period. Wastewater treatment plants and facilities have been renewed or upgraded at; Gulberwick, Hoswick, Lerwick, Hillswick, Olnafirth, Mossbank, Saltness Symbister, Yell possibly more. Waiting for info from Scottish Water.

Works to improve drinking water quality standards have been undertaken at the following locations during the past five years; Cullivoe, Eela Water, Fair Isle, Fetlar, Sandy Loch Lerwick, Mid Yell, Papa Stour, Skerries, Cunningsburgh, Lerwick ↔ Sumburgh (South Mainland water supply), South Yell, Unst, West Burrafirth and Whalsay. (check details with Scottish Water.)

Water and Wastewater Networks

		1999	2003	2004
Water connections	Domestic	9502	9655	
	Non-domestic	1119	1133	
Sewer connections	Domestic	6701	6756	
	Non-domestic	712	721	
Length of water mains (km)		1005	1015	
Length of sewers (km)		365	370	

ENERGY, RESOURCES AND WASTE

Structure Plan Vision for 2016 – The consumption of resources has been dramatically reduced with the development of waste minimisation and the recycling of all our recyclable waste, where practicable. Renewable energy projects are commonplace.

The Waste Management Section holds information on the amount of solid waste that is recycled. **The figures for 2003/04 show 15.5% of municipal solid waste and 10.9% of industrial waste is recycled.** This is an improvement from the 2000/01 figures, which were 6.7% and 1.59% respectively. The figures will continue to improve when the new waste facility at Rova Head is commissioned.

The Energy Recovery plant fuels the Lerwick District Heating Scheme. Information supplied by SHEAP (Shetland Heat Energy and Power) gives the total number of **connections to the district heating system in December 2004, as 518 domestic properties and 90 non-domestic properties.**

Interest in other renewable energy projects is increasing. There are tidal power experiments being conducted with “Stingray” in Yell Sound and others by P.U.R.E. on Unst exploring the use of wind power, electrolyte and hydrogen.

The number of domestic scale aero generators systems installed in Shetland is small at present. The number of domestic generators obtaining planning consent will be a useful future indicator for monitoring domestic turbine capacity.

In December 2004 the Planning Service was aware of the following **number of domestic aero generators:**

3 x 2.5Kw systems
4 x 6Kw systems
4 x 15Kw systems

Although not of domestic scale, the windmills at Burradale, Fair Isle and on Foula all contribute to the aim of reducing consumption of non-renewable resources.