

Housing Needs Report – Northmavine

Produced for the Northmavine Community Development Company

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Executive Summary

As part of the process to explore the potential of purchasing the Old Urafirth School and Schoolhouse to help sustain the population, economy and community of Northmavine, the Northmavine Community Development Company have commissioned this housing needs assessment. To explore the potential need for additional housing in Northmavine this assessment will utilise local and national data, as well as a community consultation.

Northmavine's population has declined significantly since 1931 when the population stood at 1,343. The 2021 estimated population figure for the area is around 715, which is a drop of around 25 from the 2011 census. The breakdown of Northmavine's population has also changed, with a significant increase in the number of older people, but reductions in some other age groups. This puts pressure on the area's three primary schools, employers looking to grow their businesses and care and health services. For the area to thrive and enjoy a long-term sustainable future this population decline needs to be reversed.

The number of households in Northmavine hasn't changed much since 2016 when there were an estimated 331 households. In 2022 that figure has risen slightly to 335. This shows that while the population is declining the number of households is staying relatively stable. This further highlights the shift towards smaller household sizes, which is often an indication of an aging population and fewer families. It also means that the pressure on the areas housing stock is remaining stable as household numbers remain steady and new build supply is low.

Northmavine has three primary schools within the area. This is unusual for a community of around 700 people, but due to Northmavine's geographic dispersal the community are keen to retain all three schools. There is one nursery located at Urafirth.

School rolls have fluctuated at all three schools over the last 20 years with the lowest combined roll of 28 falling in 2013 and 2015. This was down from a high of 85 in 1991 and more recently 56 in 2006. The rolls have recovered to a combined 62 in 2022, however, it is expected that they will once again drop to around 44 by August 2025. Birth figures for Northmavine are also variable, with a high of 11 in 2014 and 2015. However, figures dropped to two in 2022 and so far in 2023 there has only been one birth. A low birth rate will add increasing pressure to school rolls over the coming years unless more families and younger people are retained and attracted to the area.

Northmavine's income levels are generally amongst the lowest in Shetland with estimates putting it somewhere between £18,148 and £25,448, compared to a Shetland average of between £33,332 and £37,662. This shows that many households living in Northmavine will have difficulty when it comes to purchasing or renting in the open market as prices for both tenures continue to increase.

In terms of employment Northmavine has a range of different industries, including sea food processing, tourism, crofting and commuting. Discussions held with some local businesses show that attracting workers to fill empty roles and help business expansion is proving difficult at this time. There was certainly a feeling amongst businesses owners and managers that additional housing was required to allow more people to move to Northmavine to take up employment and fill some of the empty roles.

Northmavine's housing stock is primarily made up of owner-occupied housing, with quite a significant percentage of social rented housing. There is very little private rented accommodation registered with Shetland Islands Council. However, it is likely that there is some private rented accommodation where families are renting to family members, which will increase the overall numbers. There has been very little in the way of new build housing in Northmavine over recent years, which has limited opportunities to grow the population and household numbers.

While there is a quite significant social rented housing stock in Northmavine of 70 properties and the waiting list for these properties isn't very long, there is the feeling amongst those spoken to within the community that there is a need for more affordable housing, not necessarily social rented housing. Discussions with Shetland Islands Council's Housing Service brought a different perspective. The Council does not feel there is the need or demand for additional housing provision within Northmavine. This is partly due to the fact that the social rented housing within Northmavine is quite significant and spread amongst the various communities and the demand for that housing is limited. There is also the feeling that the majority of people looking for housing in Shetland want to live in and around Lerwick.

There have also been a limited number of property sales in Northmavine over the last five years, with an estimated 23 properties and 3 sites/ruins being sold between 2018 and February 2023. While the average price of £125,986 is well below the Shetland average for the period, ranging from £158,923 in 2018 to £196,527 in 2022, the lack of available housing in Northmavine is a major stumbling block for households in the area looking to move within the area or those looking to move into Northmavine.

A community consultation was undertaken as part of the housing needs assessment. An online survey was developed, with paper copies available for those who would rather use that format. There were also two community events held in Hillswick and North Roe. There were 28 responses to the survey, which while lower than hoped, provided some almost unanimous answers to a number of the key questions.

On the question of whether respondents felt there was sufficient housing within Northmavine 96% (27 of the 28) said they felt there wasn't sufficient housing within Northmavine. All 27 of those who answered the question 'Do you support the Northmavine Community Development Company's proposal to purchase the Old Urafirth School and Schoolhouse and redevelop the buildings into properties available for affordable rent?' answered yes.

Respondents were asked who they thought should be prioritised for any new housing. The two clear favourites were local young people, supported by 86% of respondents and younger people and families looking to move to Northmavine, which was supported by 71% of respondents. Families already in Northmavine was the only other group to score over 50% at 54%. Older people within Northmavine and older people looking to move to Northmavine scored 25% and 43% respectively. This shows a clear desire within the community to attract and retain younger people and families.

When asked about the types of housing respondents felt was needed low-cost affordable rented came out highest at 86%, with 68% of respondents supporting low-cost home ownership and 61% supporting help to renovate empty properties rounding out the top three.

Questions were also asked about the housing needs of respondents. Those who expressed an interest in moving selected Hillswick and Ollaberry as the primary locations and no one who responded selected Urafirth as their first-choice location. However, follow up Facebook and Instagram polls were undertaken and collected responses from six individual households suggesting they would be interested in housing provided in Urafirth. In terms of the Facebook comments one respondent was a current Northmavine resident living in another part of Northmavine, one was a household that had relocated to Northmavine recently and the third grew up in Urafirth, is no longer in Northmavine, but is looking to return to the community. This provides additional evidence that while there are not a significant number of households on the social housing waiting list, there are households that are not accounted for in the waiting list figures that are interested in moving too Urafirth.

The above responses show clear support for what the Northmavine Community Development Company is looking to do, however, it is recommended that additional community consultation is undertaken to try and obtain additional input from the community prior to any Scottish Land Fund application.

The housing needs assessment has analysed the available data on Northmavine in terms of housing stock, availability, population, school rolls and income and employment. These figures show an area that has limited available housing across all tenures, the requirement for additional workers to fill roles within the local economy and the need to retain and attract younger households and families to Northmavine to help address population decline and a demographic shift towards a more aged population.

While support for additional housing within Northmavine appears to be strong and there is certainly some unmet demand for housing within Northmavine, there is limited evidence of quantifiable demand for additional housing, which is similar to the results of the 2018 survey. This does not mean that a housing project at the Old Urafirth School would not be a success or bring benefit to the community, it simply means that a development of three of four properties at the Old Urafirth School will carry a certain amount of risk.

The report recommends that the Northmavine Community Development Company engages with Shetland Islands Council's Housing Service, as well as the Scottish Government's Rural and Islands Housing Fund officer team to discuss the proposed project and way ahead.

The report also recommends that the Northmavine Community Development Company establishes a waiting list for households looking for housing in Northmavine. This will help establish more quantifiable evidence for housing and also help direct the Northmavine Community Development Company in their planning for potential housing provision.

The main recommendation regarding the Old Urafirth School is that should the Northmavine Community Development Company look to pursue a purchase it is recommended that the project reduce from four properties to three properties and instead of being made up of four one-bedroom flats the School element of the project should, if possible, be made up of two two-bedroom flats. Alternatively the Old School could be demolished and two new build properties could be developed on the site to go alongside the refurbishment of the School House.

Background

Introduction

As a community Northmavine faces many of the same challenges that numerous other island and remote rural communities face, including population sustainability and an ageing demographic, lack of workforce, connectivity, both transport and digital, employment, climate and housing. Looking to help address issues some of these issues Northmavine Community Development Company is investigating the potential of purchasing the Old Urafirth school and Schoolhouse from the Shetland Islands Council to develop into additional housing for the area.

As part of the project development process and as a requirement for both the Scottish Land Fund and Rural and Islands Housing Fund the Northmavine Community Development Company has appointed L & L Fraser Ltd to undertake an up to date housing needs assessment for Northmavine.

The report aims to:

- Assess the levels of need and the potential demand for housing within Northmavine,
- Identify any barriers that households currently face in accessing housing within Northmavine,
- Analyse the tenure and property types that households already living in Northmavine, as well as those potentially looking to move to Northmavine may favour,
- Assess how these findings might fit within the proposals for the Old Urafirth School and Schoolhouse.

This assessment will utilise available data from national and local sources, as well as a community consultation, to analyse the potential need for additional housing in Northmavine and the most effective options for the Old Urafirth school and schoolhouse should the Northmavine Community Development Company look to pursue purchase and redevelopment. The housing needs assessment is one element of the process and additional community engagement will be undertaken as the project develops beyond the initial feasibility phase.

Background

Northmavine is the most peripheral area on the Shetland Mainland. Hillswick, Ollaberry and North Roe and the three main settlements. Hillswick and the neighbouring community of Urafirth have around 100 properties between them. They share a primary school and community hall. Hillswick also has a shop, part-time post office, Doctor's surgery and the St Magnus Bay Hotel.

Ollaberry has around 70 properties, as well as a community hall, an industrial site, a shop and post office, a garage, primary school and Bruckland recycling centre. North Roe has around 60 properties. It also has a part-time post office, community hall and primary school. Sullom and Eshaness are the other two main communities within Northmavine and while smaller than Hillswick, Ollaberry and North Roe they do have their own community halls.

The larger settlement of Brae is located around 1.5 miles south of Mavis Grind and has a supermarket, fire station, pharmacy, high school, leisure facilities and bus links to Lerwick.

Northmavine's primary industries include aquaculture - salmon, mussels, and scallops - fishing and fish processing, crofting and farming, and tourism.

Methodology

The housing needs assessment outlined below is designed to establish whether there is demand for additional housing provision in Northmavine. It will help provide the Northmavine Community Development Company with some of the evidence they require to make the decision on whether to pursue purchase of the Old Urafirth School and Schoolhouse and convert it into additional housing to try and help sustain and grow the area's population.

This report will utilise data from the local community taken from a survey that was available in paper form and online, other local data sets and relevant national datasets. Data utilised will include population and demographics estimates and projections, a housing market analysis, school roll forecasts, the social housing waiting list and housing stock data, the Shetland Housing Needs and Demand Assessment, as well as the survey responses. This approach will combine the best data available to assess the housing needs in Northmavine and the options that might be suitable for the redevelopment of the Old Urafirth School and Schoolhouse.

Community consultation included the development of a fourteen-question survey seeking the community's view of the need for housing in Northmavine and the types of households who most require housing. There were 28 responses to the survey, meaning roughly 8% of the 335 households on the island completed the survey. This response rate is not as high as would have been liked and a follow-up poll was undertaken using the Northmavine Community Development Company Facebook page to try and supplement responses. During a visit to Northmavine conversations were had with a number of employers within Northmavine.

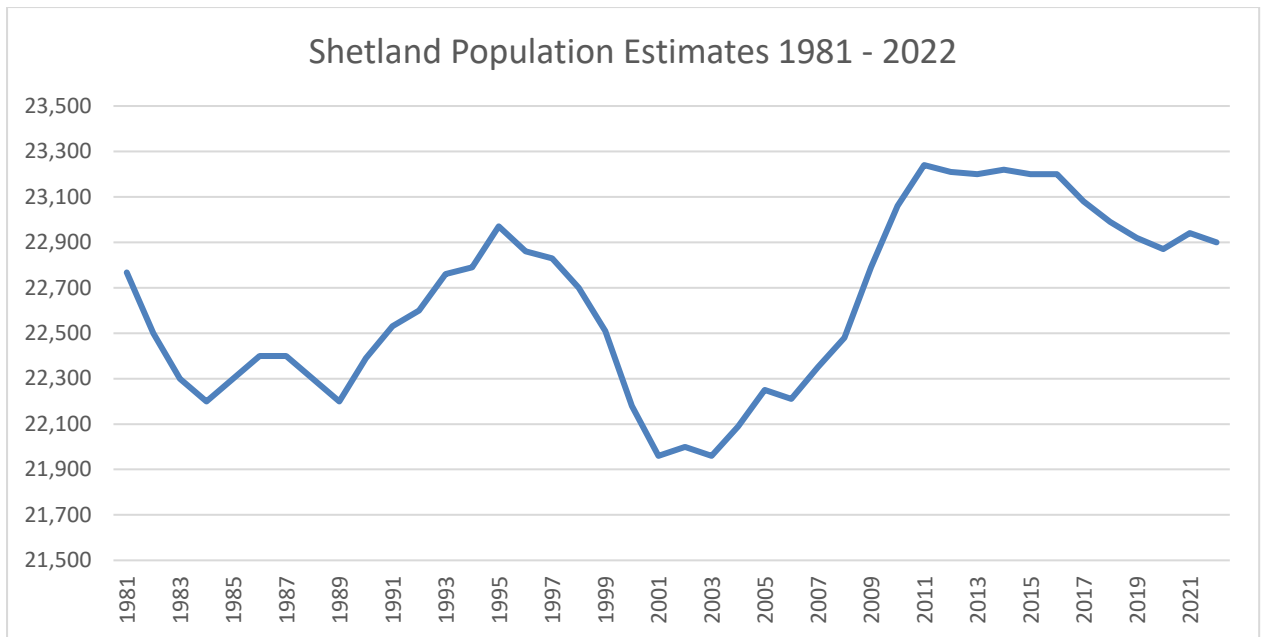
As well as a survey two community consultation events were held. One in Hillswick and one in North Roe. Unfortunately, no one from the community attended the events. Going forward we will look at alternative ways of engaging with the community.

As is common with housing surveys and needs assessments, the data presented here provides a snapshot of the housing need at the time of writing. While every effort is made to produce estimates that are as accurate as possible, it is impossible to fully predict the number of households that will be looking for housing in Northmavine at the point where the Old Urafirth School and Schoolhouse project would be completed and ready for occupation.

Background Data

Population and Demographics

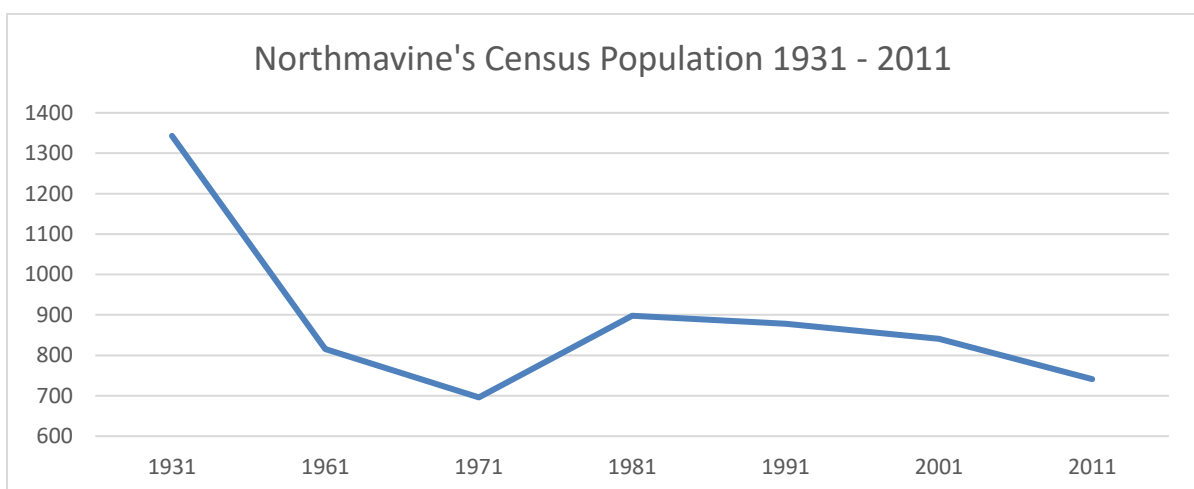
Shetland's population was 23,167 at the 2011 census, this was an increase from the 2001 figure of 21,988 and the highest population Shetland had seen for over 90 years, having been as low as 17,327 in 1971. However, population estimates estimate that Shetland's population has dropped from the 2011 high of 23,167 to 22,870 in 2020, before rebounding slightly in 2021 to 22,940. The recently released data for the 2022 Census shows the population dropping further to 22,900. The graph below outlines estimated figures from 1981 to 2022.



(Source: National Records of Scotland Mid-Year Population Estimates 2021 & 2022 Census)

Northmavine's population has also changed dramatically over the last 90 years, but has not always followed the same trends as the total Shetland population. Northmavine had a population of 1,343 at the time of the 1931 Census. From 1931 to 1991 Northmavine's population profile followed that of the rest of Shetland showing a decline from 1931 through 1961 and 1971, before rebounding between 1971 and 1981, probably brought about by the North Sea oil boom of the 1970's. While we have no yearly figures for Northmavine between 1991 and 2001 the estimates for Shetland show an increase in population between 1991 (22,530) to 1995 (22,970), before then falling back to 21,960 in 2001. The figures for Northmavine show a decline from 1991 to 2001, but no detail of whether the population profile mirrored that of Shetland or just carried on a steady decline. It is between 2001 and 2011 that Northmavine's population timeline diverges from that of Shetland as a whole. Shetland's population increases from 21,960 to 23,240, while Northmavine's drops from 841 to 741. The 2022 Census data has not yet been released at a Northmavine level.

The graph below shows the change in the Northmavine population from 1931 to 2011.



(Source: Scotland's Census)

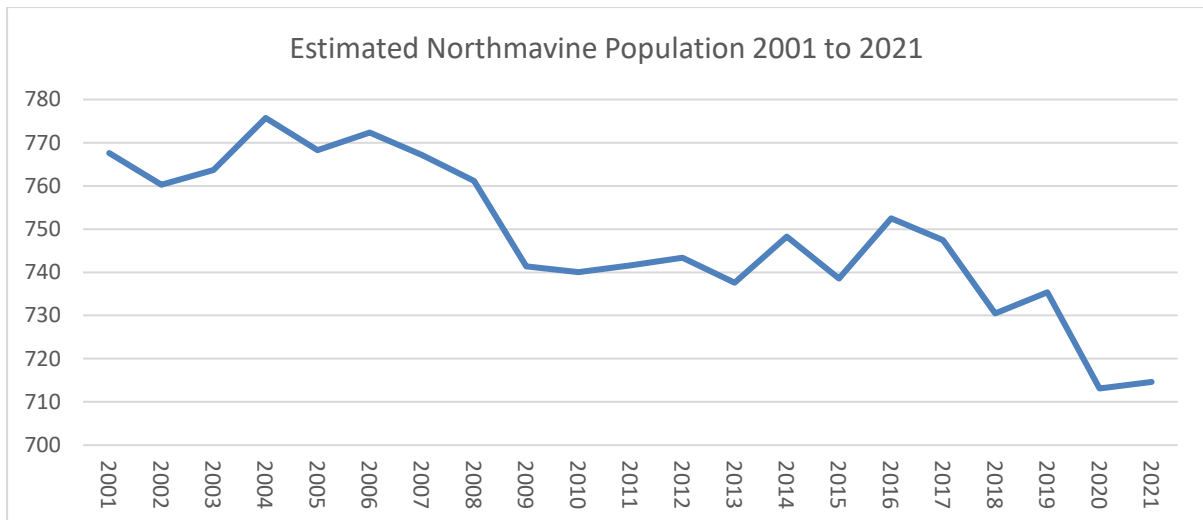
The 2022 Census figures have not yet been published, so a different method of estimating Northmavine's current population needs to be developed. The National Records of Scotland produce Small Area Population Estimates which are reported at a data zone level. Northmavine is split across two data zones, S01012410 and S01012412. S01012412 contains the northern part of Northmavine down as far as Enisfirth and Burrelland. However, as well as the south of Northmavine S01012410 also contains areas outside Northmavine, including Brae, Detling, Wethesta and Muckle Roe. The map below shows the areas covered by the two data zones.



(Source: SIMD)

The inclusion of Brae etc within S01012410 means that the majority of the population of S01012410 is outside of Northmavine. This makes population estimates difficult and using the entire population of S01012410 would give very inaccurate estimates. It is possible however, using 2011 Census data, to develop an estimate for the percentage of S01012410's population that is within Northmavine. Northmavine's population at the time of the 2011 Census was 741. The SAPE population estimates for 2011 show a population of 647 for S01012412 and 1,051 for S01012410. To meet the 2011 Census figure of 741 for Northmavine requires the total population of S01012412 (647) and 94 (9%) of the population of the larger S01012410 data zone that includes Brae etc.

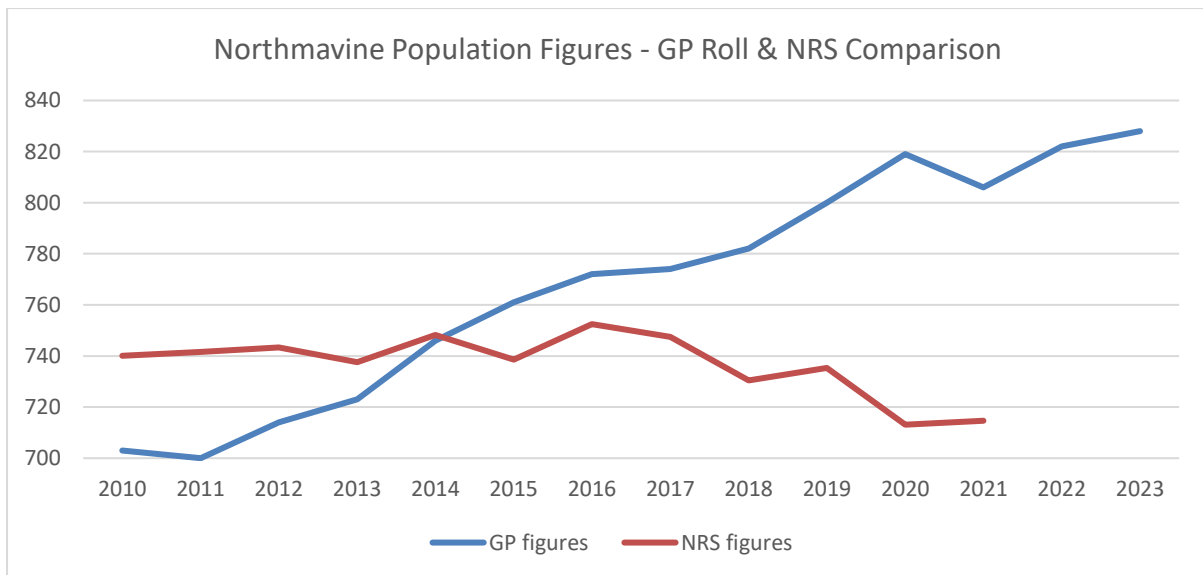
Using this method it is estimated that Northmavine's population was around 715 in 2021. The estimated population from 2001 to 2021 is outlined in the graph below. While this method produces a rough population estimate, it must be noted that it is likely that the percentage of the population in the S01012410 data zone that lives outside of Northmavine may well have changed since 2011, as it is likely that more housing development etc has happened in the Brae area than Northmavine.



(Source: NRS Small Area Population Estimates 2021)

The graph above outlines the continued decline in Northmavine’s population between 2001 and 2021, although it is estimated that there was an initial slight increase in population between 2011 and 2016, before the population once again started to fall. In comparison the wider Shetland population dropped slightly between 2011 and 2016, before starting a steeper decline, Much like Northmavine.

NHS Shetland have also provided the GP practice totals for the Hillswick Surgery in Northmavine. Hillswick is the only GP surgery in Northmavine, so it is expected that the vast majority of people and households in the area will be registered at Hillswick. The graph below shows the GP registrations at the Hillswick surgery and a comparison to the National Records of Scotland estimates.

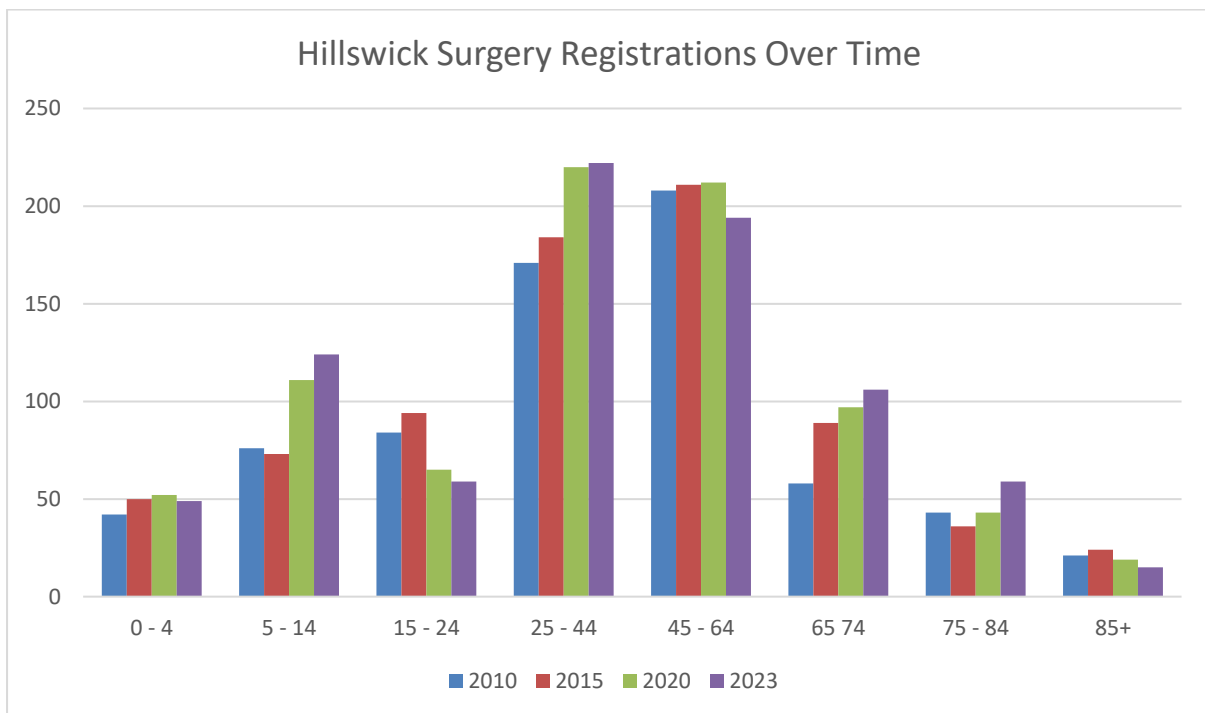


(Source: NRS Small Area Population Estimates 2021 & NHS Shetland)

The graph shows a significant increase in the Hillswick surgery registrations between 2011 and 2023, with an increase of 128 people. This is in stark contrast to the National Records of Scotland estimates which show a continued decline in the population.

A follow-up discussion was had with Hillswick Surgery to try and explore the significant increase in registrations and difference from the National Records of Scotland estimates. The expectation was that the increase in registrations at the Hillswick Surgery was due to people outwith the area in Brae and other areas of Delting registering at Hillswick Surgery. The Surgery confirmed that this was the case and estimated that around 100 people from outside Northmavine were registered with the surgery. This reduction in 100 registrations would take the number of people living in Northmavine and registered at the Hillswick Surgery to around 728 in 2023 and 706 in 2021 when the last National Records of Scotland based estimates developed for this assessment show an estimated 715 people living in Northmavine. This gives more confidence that the population estimates model developed through this assessment should be quite accurate.

Breaking down the population of Northmavine by age group is quite difficult. The National Records of Scotland Population Estimates do not breakdown the population by age group and as evidenced above the Hillswick Surgery registration list has an estimated 100 people from outwith Northmavine on its books. Although the figures at Hillswick Surgery will have some anomalies, due to the registrations of people from utwith Northmavine, it is still worthwhile assessing the Surgery’s age profile and the graph below outlines the age breakdown in 2010, 2015, 2020 and 2023.



(Source: NHS Shetland)

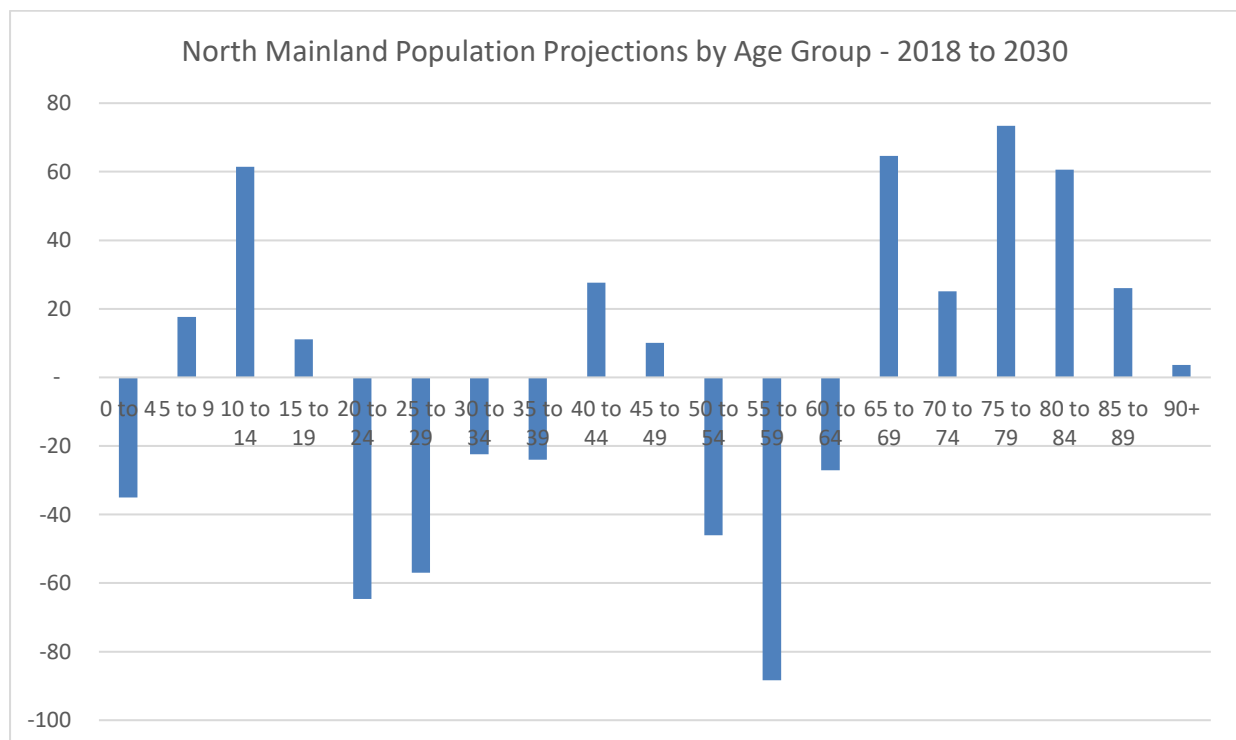
The graph shows a slight increase in the 0 to 4 age group and a larger strong increase in the 5 to 14 age group. This is reflected in the school roll figures outlines below. The dip in the 15 to 24 age group is a worry, however the strong increase in the 25 to 44 category shows resilience in the workforce. This increase may well be linked to the increase in the 5 to 14 category, which has a similar trend, which may well indicate more families registering with the Hillswick Surgery. It is assumed that younger households and families from outside Northmavine are more likely to register with a surgery outwith their area than older households who may have greater mobility and transport restrictions. Although that is just speculation it may potentially mean that some of the increase in

families and younger people in the Hillswick Surgery register is coming from outside Northmavine. The increase in the 65 to 74 and 75 to 84 age groups is quite significant, with an almost doubling of the 65 to 74 age group over the 13 year period. The reduction in the 85+ age group may well be due to older people needing to leave the area to receive care and support, but again, there is no data available to support this assumption.

Overall Shetland’s population has changed significantly between 1931 and 2021, including periods of growth and contraction, Northmavine’s population has declined significantly over the period, with one increase between 1971 and 1981. This change follows a pattern that is seen in many remote rural and island areas of a continued decline in population in remote areas and a centralisation of population in more urban and central areas. To ensure community sustainability this trend needs to be reversed.

Population Projections

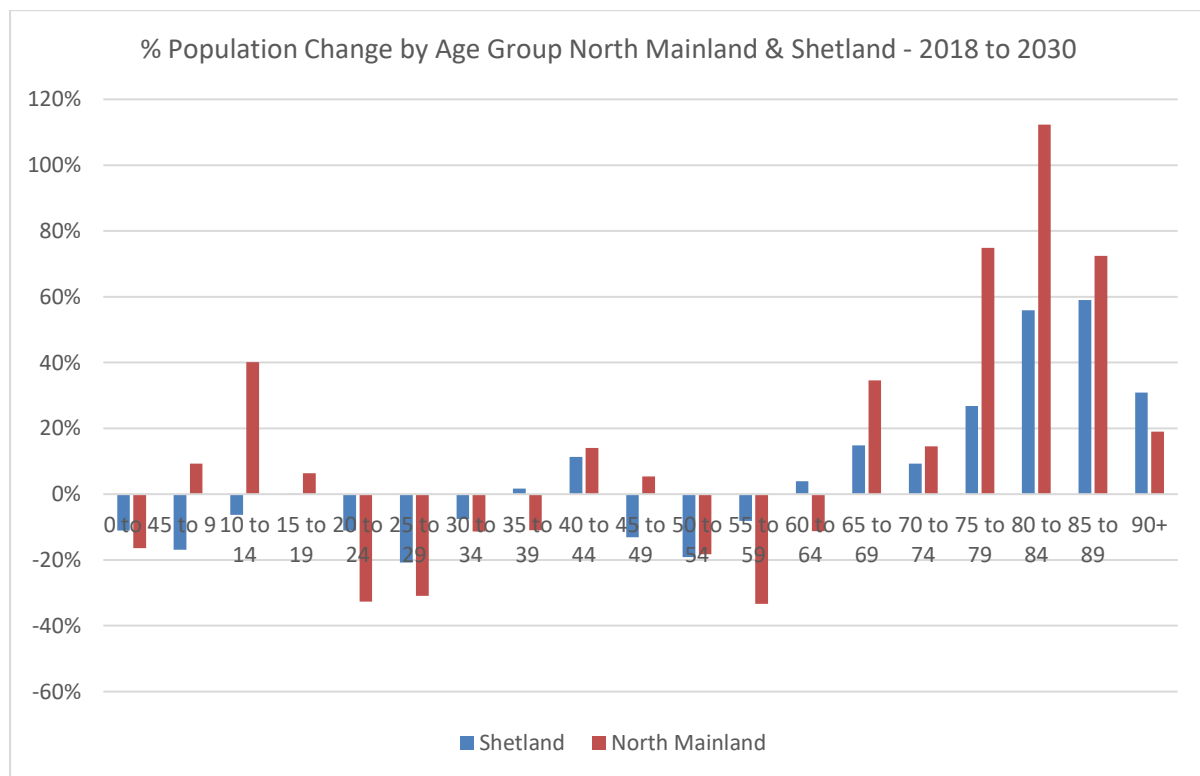
Looking forward population projections are not available at a data zone level. The smallest area projections are at a sub-council area and Northmavine is included in the North Mainland area. The projections from 2018 to 2030 are laid out by age group below. Prior to analysis of the figures it must be said that population projections are at best an estimate based on previous years’ data. They are particularly difficult to estimate for small populations and while they provide a useful tool, they should not be treated as formal population forecasts due to the small scale of the populations in question. At best they are an educated guess. The trends identified do not reflect potential policy changes that Shetland Islands Council may wish to enact to try and help sustain rural and island areas populations or wider impacts that may come from external factors or action on the ground to try and increase an area’s population. For example significant economic shocks, changes in legislation around housing, tourism, agriculture or fisheries or further reductions in public sector budgets.



(Source: NRS Sub-Council Area Population Projections, 2018)

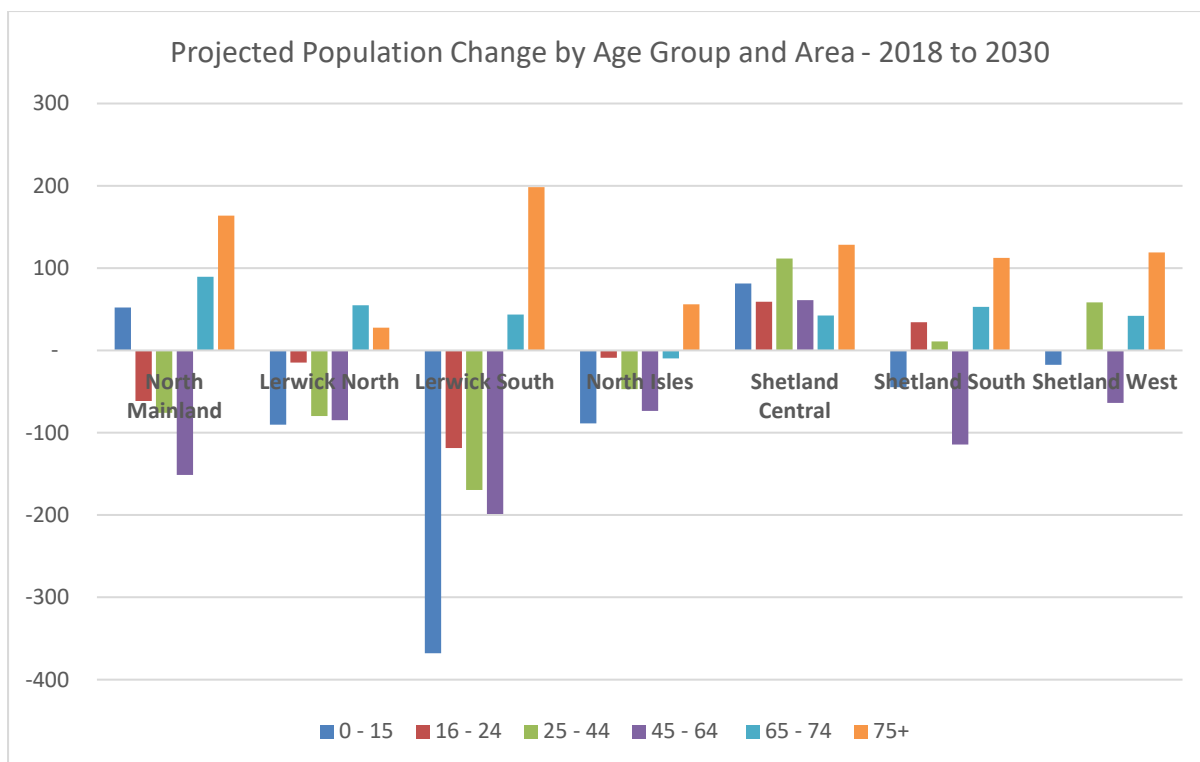
The graph above outlines the projected change in the North Mainland population and while the projections show a very small increase of 17 people overall during the period, there are much larger changes in the make-up of the area's population. While there is a projected increase in the number of school age children there are quite significant decreases in both pre-school age children and the 20's and 30's age groups. There is also projected fall in the number of older working age adults from 50 to 64. All older age groups are projected to see increases, in some cases these are quite significant.

The graph below compares the North Mainland figures to Shetland as a whole. The graph shows that in the majority of age groups North Mainland has a very similar trend line to Shetland. The main areas of difference are the 10 to 14 age group where North Mainland is projected to see a significant rise, while Shetland's overall total falls, the 50 to 59 age group where North Mainland is projected to see a much larger fall in population and the older age groups where North Mainland is projected to see a much higher growth in most age groups, except for the over 90s where Shetland as a whole has higher figures. As outlined above population projections are very difficult even at a Shetland scale, so any significant fluctuations at age group levels for North Mainland that are out with the general Shetland trend need to be treated with care.



(Source: National Records of Scotland Small Area Population Projections 2018)

The graph below shows a breakdown of the population projections for each sub-council area in Shetland.



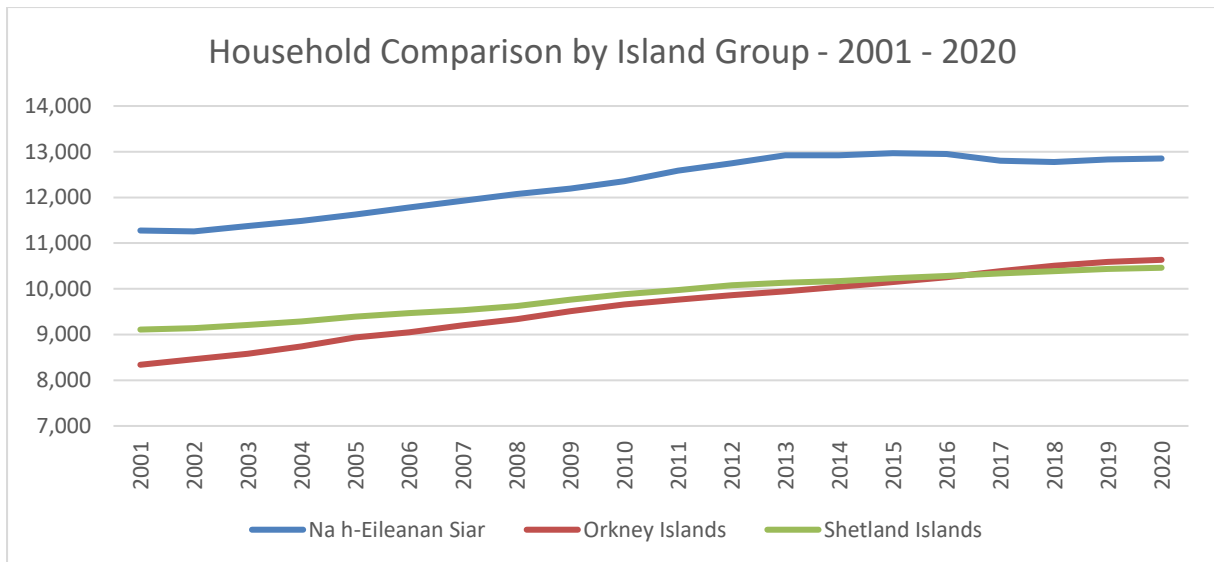
(Source: National Records of Scotland Small Area Population Projections 2018)

The graph shows that the population of North Mainland is largely expected to change in a similar way to some other areas of Shetland. The North Mainland is one of only two areas that are projected to see an increase in the 0 to 15 age group, the other being Shetland Central. The 16 to 24, 25 to 44 and 45 to 64 age groups are all projected to see a decline in numbers and this may well bring additional pressure to the community as the working age population falls. There is a similar trend in most of the other areas in Shetland, Shetland Central being the main outlier. Like most areas in Shetland North Mainland is projected to see quite a significant increase in the number of older people with projected population growth in the 65 to 74 and 75+ age categories.

Projected falls across the young and working age populations, as well as an increase in over 75's, will put additional pressure on service delivery and sustainability across all of Shetland, but specifically in outlying areas. Increasing Northmavine's population, especially with additional younger people and families, should be a key priority and will help offset the projected population falls that are outlined in the graphs above as well as sustain the community and local areas economy.

Households

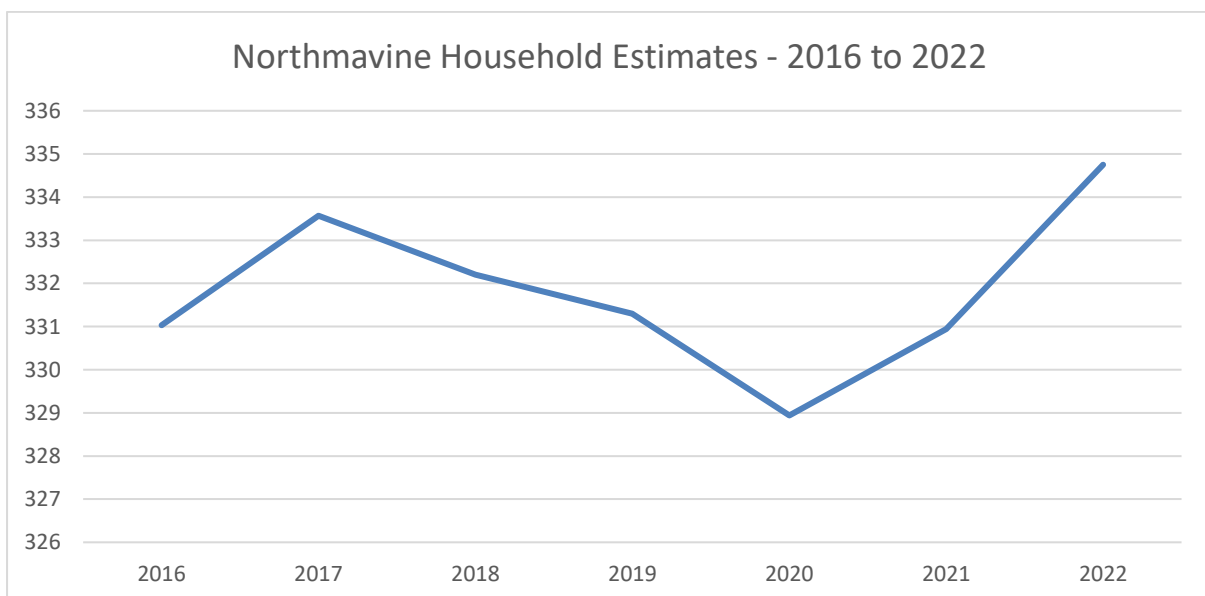
Shetland as a whole has seen the number of households increase between 2001 and 2020 from around 9,100 to 10,461. This represents a 14.84% increase, which is very close to the Scottish average 14.27%, and the 13.95% of the Outer Hebrides but behind Orkney's 27.53%, which is the highest percentage increase of any area in Scotland.



(Source: National Records of Scotland Household Estimates, 2020)

The number of households in Shetland is projected to increase to 10,742 by 2028. An increase of around 300 on the 2020 estimates

At a more local level household estimates for the two data zones that include parts of Northmavine have been calculated in the same fashion as the population estimates outlined above. This approach sees all of the households in S01012412 representing the north of Northmavine and 9% of the households from S01012410 which covers the south of Northmavine and other areas of Brae and Delting. The graph below shows figures from 2016 to 2022 and shows little change in household numbers over that period with an initial rise from 331 to 334, before falling back to 329 and then rising again to 335 in 2022.



(Source: National Records of Scotland Small Area Household Estimates, 2022)

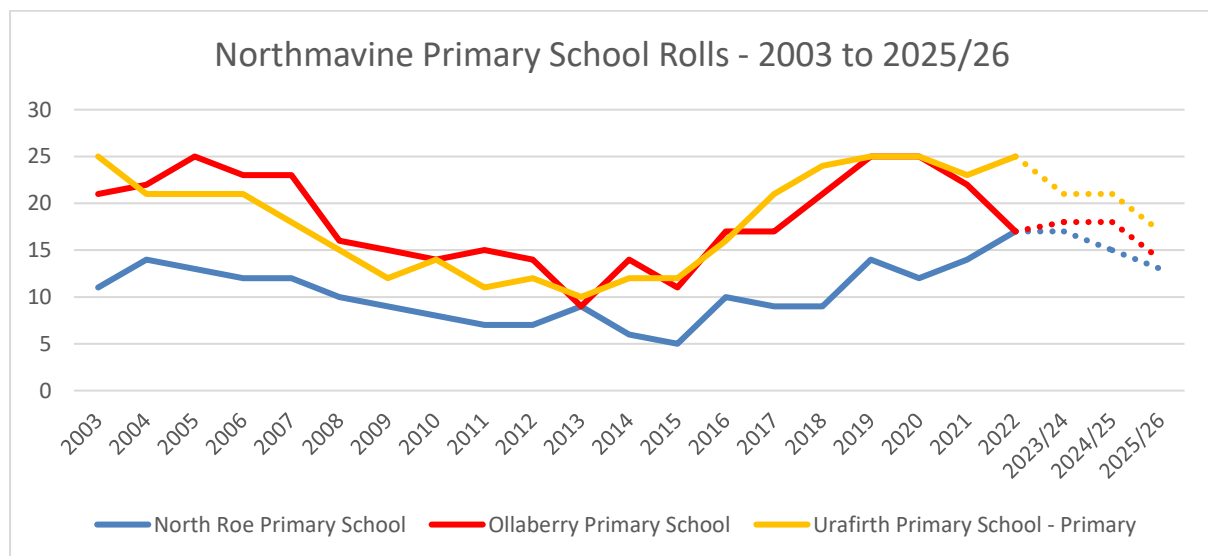
The relative stability of estimated household numbers, even with a decline in estimated population levels over the period, would suggest an increase in smaller households and a reduction in families.

This would seem to support the projected change in demographic that is facing Shetland and much of rural and island Scotland where the size of the older population continues to increase, while the size of the younger and working age population declines fuelling a shift to smaller average household size. This is supported by the figures for the percentage of dwellings that have a single occupancy Council Tax reduction. In 2016 the figure for Northmavine was around 29%, just below the Shetland average of 30.8%, by 2022 the Northmavine figure increased to 34%, slightly more than the wider Shetland average which grew to 34.6%.

School Roll

Northmavine has three primary schools located in Urafirth, Ollaberry and North Roe. In 2014 Shetland Islands Council proposed the closure of North Roe Primary, Urafirth Primary and nursery with all primary and nursery children within Northmavine being relocated to Ollaberry Primary. These proposals were met with stiff resistance from the local community and the proposals were rejected following consultation. The decision to keep the schools open was largely agreed because of the desire in the community to regenerate and grow the population within Northmavine. It was felt that closing the schools at North Roe and Urafirth would make the areas less attractive for families to stay or relocate to and that would harm Northmavine’s chances of stabilising and increasing the area’s population.

The graph below outlines the school rolls of Northmavine’s three primary schools and covers the actual school rolls for 2003 to 2022, with an additional three years of forecasted school rolls from 2023/24 to 2025/26 as dashed lines. School rolls can vary over time and can be difficult to predict, particularly for small population areas and schools like those in Northmavine. The graph shows an overall decline in the school roll across all three schools between 2003 and 2015, before the rolls increase quite drastically to 2019. The roll at Ollaberry has since declined but North Roe has grown slightly and Urafirth has remained at its highest level into 2022.

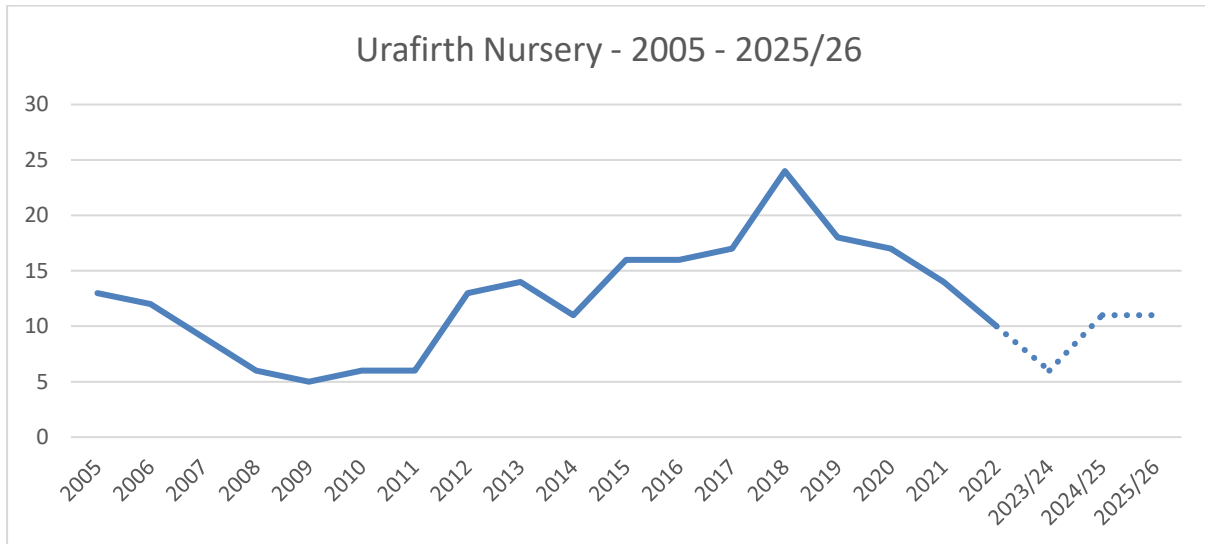


(Source: Shetland Islands Council)

Looking forward the figures show that the roll at Ollaberry is projected to increase slightly before falling, while the rolls at both North Roe and Urafirth are projected to fall. This will reduce the

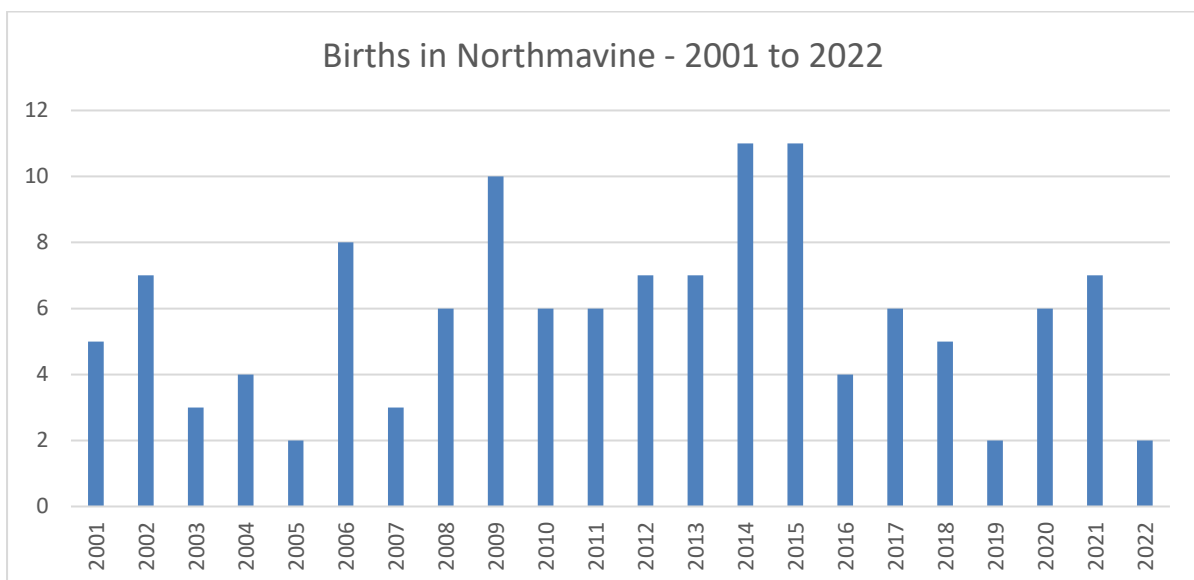
overall primary school population in Northmavine from a high of 64 in 2019 to an estimated 44 in 2025/26.

The graph below shows the roll for the Urafirth Nursery, the only nursery in Northmavine, from 2005 to 2022, with another three-year projection to 2025/26. Following an initial decline the nursery numbers increased to 2018, before dropping back and halving over the last 5 years, the roll is projected to fall further from 10 to 6, before rebounding to 11 in 2025/26.



(Source: Shetland Islands Council)

To help inform the potential future nursery roll NHS Shetland have provided birth figures for mothers with a home address in Northmavine and the graph below outlines the trend in births from 2001 to 2022.

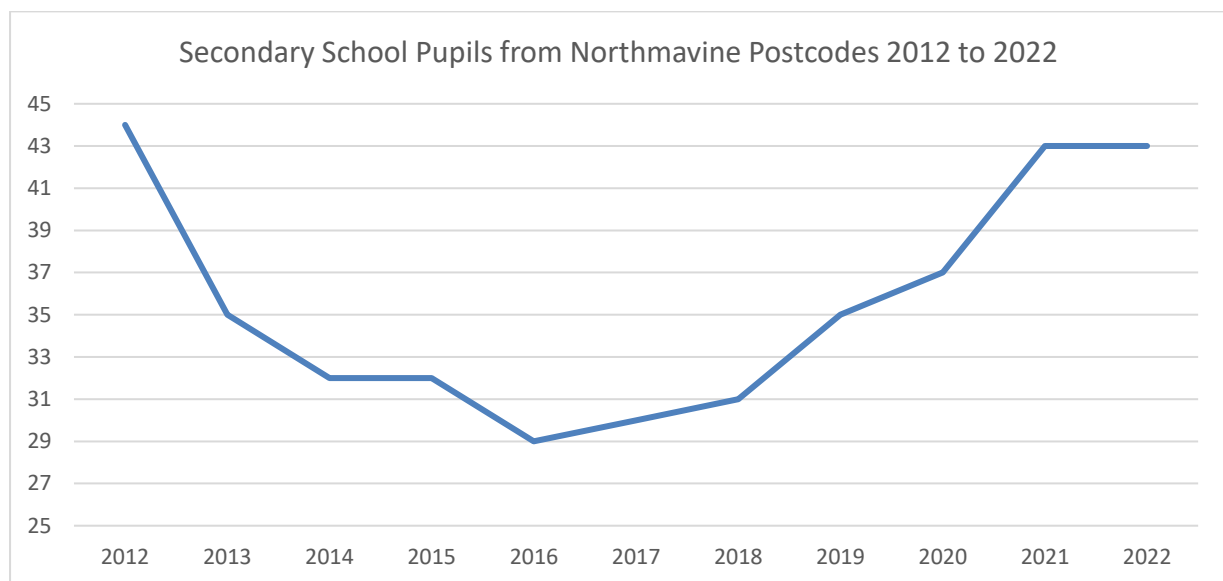


(Source: NHS Shetland)

The graph shows that births have ranged from two to eleven over the 22 year period, with an average of six births a year. There should be a slight increase in children in the Urafirth Nursery over

the next few years due to six and seven children being born in the area in 2020 and 2021. This is reflected in the school roll projections outlined above. However, there is then a drop to two in 2022 and data shows only one birth between January and June 2023. This means a potential decline in the Urafirth Nursery roll beyond 2025/26 if no more children move to the area.

In terms of secondary school pupils children from Northmavine attend the high school in Brae. The graph below shows the number of secondary school pupils with home postcodes within Northmavine between 2012 and 2022. Following a significant initial decline between 2012 and 2016 the secondary roll from Northmavine increased back to 2012 levels by 2021 and remained constant into 2022. From discussions with some local employers this increase in teenagers has helped them fill some peak summer season job vacancies over the last few years.



(Source: Shetland Islands Council)

There is no school roll projection for secondary school pupils, but with primary rolls in Northmavine projected to fall further it is possible that secondary figures will also start to drop over the coming years. The decline in the school roll from nursery, through primary and into secondary will prove detrimental to Northmavine and it is possible that an increase in family housing may help attract households from outside Northmavine to move to the area, which would strengthen the areas school roll figures.

Income

The most up to date data for the average weekly household income that specifically covers the two data zones that include Northmavine (S01012410 and S01012412) was published by the Scottish Government and is based on 2018 figures. The averages are £508 and £349 respectively. The £349 figure covers the majority of the Northmavine population, while the £508 figures also includes Brae and other parts of Delting. The £349 figure that covers the majority of the Northmavine population and excludes areas like Brae is the second lowest figure in all of Shetland. The yearly calculation for mean gross annual household income produces an average yearly mean gross household income of £18,148, which seems very low, especially when the North Mainland Housing Market Area average is £30,264 and the Shetland average is £33,332. However, as the S01012410 figure is entirely based on Northmavine it is probably the more accurate figure for the area based on this model.

As a comparison there is also another income data set that is widely used, CACI PayCheck (2020). It is used in the Shetland Islands Council Housing Needs and Demand Assessment (2022) and has an average mean household income of £37,603 for the 1,406 households that make up the North Mainland Housing Market Area. As outlined above the Scottish Government's figures for the same locations within North Mainland estimate a mean average household income of £30,264. This means there CACI PayCheck gross mean household income estimates are around £7,300 a year higher than the Scottish Government estimates for the same North Mainland Housing Market Area. As CACI PayCheck data is not freely available this report is unable to drill down into the figures to estimate Northmavine figures specifically, but if the average difference of £7,300 between the Scottish Government and CACI models for North Mainland's Housing Market Area is added to the Scottish Government figure of £18,148 for the datazone that covers the majority of Northmavine (S01012412) a more plausible figure of £25,448 is produced. This figure is still well below the North Mainland and Shetland averages, but the Northmavine Community Development Company feel that these figures are probably quite accurate as an average for the area. This approach is by no means a perfect method, but it does hopefully provide an estimate of mean gross household income for Northmavine that offers a more accurate measure than the combined North Mainland Housing market Area data which covers a much wider area than Northmavine.

The difference between the Scottish Government and CACI PayCheck figures is not confined to North Mainland. CACI PayCheck's Shetland average figures are around £4,300 higher than the Scottish Government figures. This shows a common divergence in the models, albeit with a higher differential in North Mainland than the Shetland average. The Shetland Islands Council Housing Needs and Demand Assessment also identified this anomaly and the decision was made to utilise CACI PayCheck data as it was more up to date (2020 compared to 2018) and could be utilised at postcode level.

Employment

Northmavine has a varied employment base ranging across sea food processing, crofting, commuting, tourism and the service economy. As part of the needs assessment engagement was undertaken with a number of employers in the community. The majority stated that they are struggling to attract the staff they require to effectively run or expand their business. A number of businesses rely on employees coming from Brae and sometimes further afield. The lack of public transport options makes it difficult to attract workers and one company puts on a dedicated minibus service to get some of its workers to the business. The requirement for additional staff ranges across different sectors and skillsets, but there are defined needs in the area around Hillswick and Urafirth, in close proximity to the Old Urafirth School, which the Northmavine Community Development Company is looking to potentially purchase and develop as affordable housing.

Some of the local businesses spoken to stated that they relied on local teenagers working through the summer holidays to help meet staffing requirements over the peak summer tourism season. The school roll figures outlined above show that while there is currently a good crop of local teenagers to draw on to potentially fill these rolls, the potential for declining secondary school rolls over the coming years mean the supply of younger people looking for work over the holidays may start to shrink and this will impact the local employment market if not addressed.

With the existing population in Northmavine proving unable to meet the labour force needs of local businesses, attracting more people to the area to take up the employment opportunities that there are in Northmavine, as well as providing housing for younger people who may be looking to stay in the area to take up work after leaving education, is a key argument in favour of providing some additional affordable housing in Northmavine.

Housing Stock

Housing Numbers and Tenure

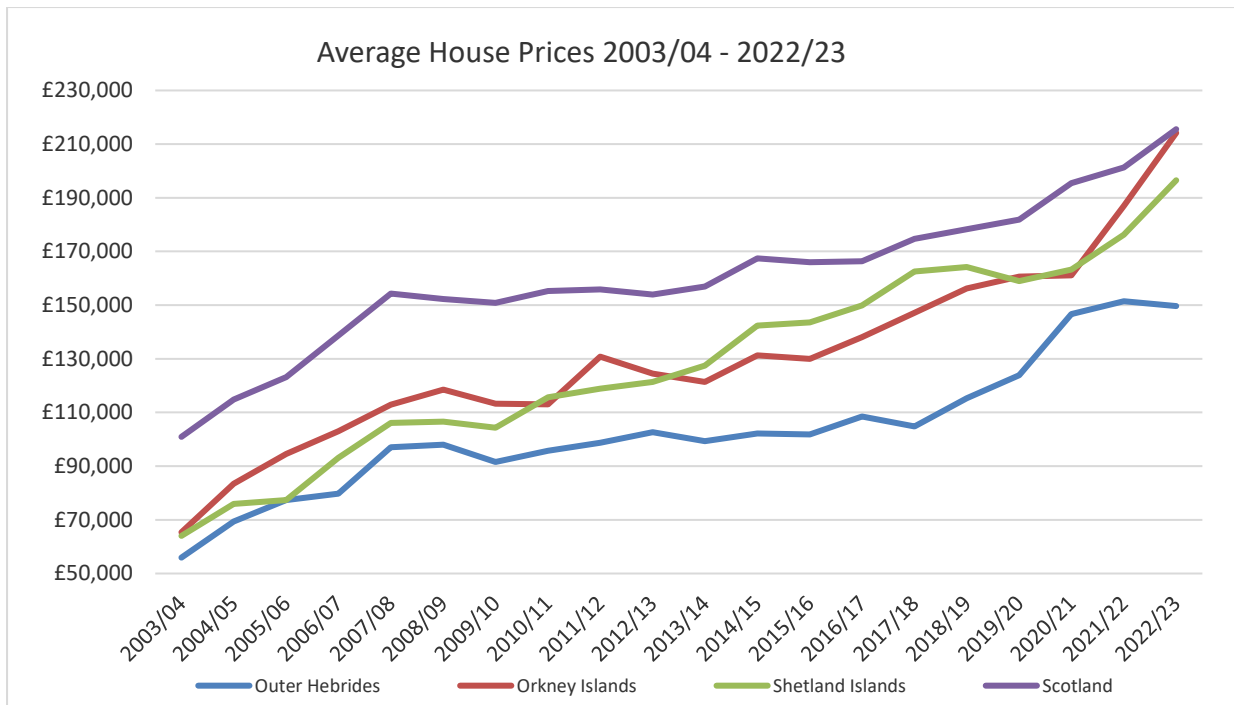
There are an estimated 395 dwellings in Northmavine (2018 Housing Needs Feasibility Studies report). Of these 335 are thought to be occupied, with 56 unoccupied or long-term empty properties (SIC, 2023) and 13 second homes (SIC, 2023). This calculation gives a slight discrepancy in terms of total figures with the total properties adding up to 404 rather than 395, giving a difference of 9 properties which cannot be accounted for. However, this follows a similar discrepancy in the 2018 Housing Needs Feasibility Studies report which had a difference of 13 in its workings and a total of 408 properties when all elements were added together. The discrepancies are not significant so will have limited impact upon the assessment.

In terms of rental properties there are 70 social rented properties split between Shetland Islands Council and Hjaltland Housing Association and a further 7 registered private rented properties (SIC, 2023). Only two properties have so far been registered as short-term lets under the new licensing scheme (SIC, 2023), but it is thought that there will be a number of other properties that are currently used for short-term lets that will be registering over the coming months.

House Sales

The average house price in Shetland has risen dramatically over the last 20 years, Figures from the Registers of Scotland show an average property price of £94,024 in 2003/04 increasing to an average of £195,527 in 2022/23. The increases in 2021/22 and 2022/23 in particular have been striking. There was an average increase of £12,976 in 2021/22 and £20,239 in 2022/23. These figures were well above the Scottish average (£5,788 and £14,263 respectively), but below the increases for Orkney (£25,901 and £27,199 respectively). This shows the strength of the housing markets in Orkney and Shetland and the demand for housing, as well as indicating a probable restricted supply of available housing.

The graph below shows the increase in house prices in Shetland between 2003/04 and 2022/23 and a comparison to Orkney, the Outer Hebrides and the Scottish average.

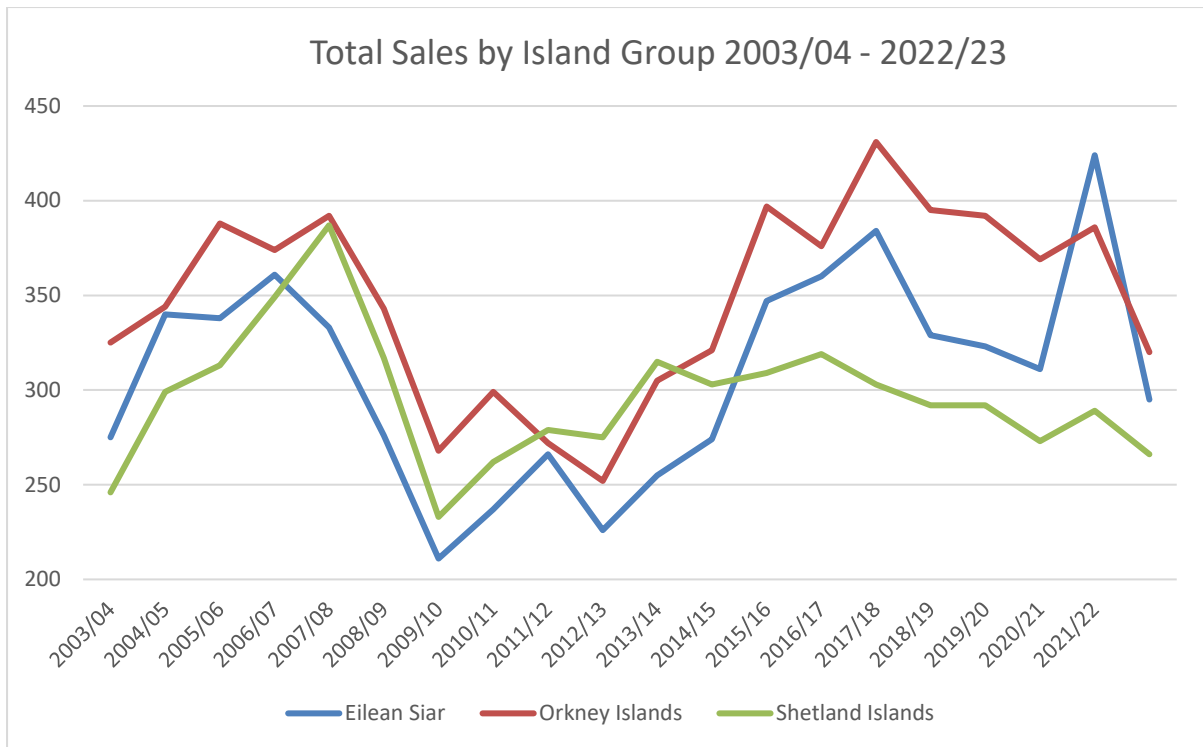


(Source: Registers of Scotland Monthly House Prices data)

The graph shows an increase of over £120,000 or 206% over the period for Shetland, while the Scottish average only increased by 114%. This is the second highest percentage increase of any Scottish Local authority area behind only Orkney (228%). These figures show the huge pressure that has been added in terms of affordability of housing in Shetland, particularly for younger households looking to get on the housing ladder who are seeing prices rise faster than the vast majority could hope to save.

There is also the potential for significant additional pressure in the housing market due to the continued increase in interest rates due to high levels of inflation that, contrary to popular opinion, will probably remain stubbornly high over the next few years due to continued significant public sector borrowing. This in turn means a return to the very low interest rates seen since 2008 is very unlikely and households coming off very low fixed interest rates will probably face significant increases in their monthly mortgage costs over the coming years. This will add increased pressure to the housing markets of the Northern Isles and while it may put some downward pressure on house prices, the continued high demand from households outside the islands to move to the islands and the limited supply of new build housing may well reduce the downward pressure on prices that is being seen elsewhere.

How much impact this will have on the housing market in Shetland over the next few years remains to be seen, however, the volume of sales in Shetland, as in Scotland's other island council areas, has dropped over the last seven years. In Shetland this has meant a drop from a high of 431 to 320 sales in 2022/23. The volume of sales is generally significantly higher in both Orkney and the Outer Hebrides, but both of these areas saw significant percentage drops in sales volumes in 2022/23. This is outlined in the graph below. This trend appears to be continuing with into 2023/24. The continued increase in both house prices and interest rates means that this pattern of reduced sales is likely to continue.



(Source: Registers of Scotland Monthly House Prices data)

The graph above clearly outlines the impacts of previous market shocks in 2008/09 and 2012/13 where sales volumes were impacted. Although volumes in Shetland were less impacted than Orkney or the Outer Hebrides.

At a more local level an assessment has been undertaken of the housing that is currently available within Northmavine. Very few properties are currently available for purchase, with only one property in Ollaberry for sale when the assessment was taking place (June & July 2023). Two ruinous properties are for sale, one of which has been sold.

Figures from Rightmove.co.uk estimate 26 sales in Northmavine between 2018 and February 2023. These consist of 23 properties and 3 sites/ruins with average prices of £125,986 and £30,375 respectively. Seven properties were between £50,000 and £99,999, with ten properties between £100,000 and £149,999 and two between £150,000 and £199,999 and finally four properties between £200,000 and £260,000.

In terms of property size only 9 properties sold have that information available via Zoopla/Rightmove. These figures are below.

- 2 bedroom – 4
- 3 bedroom – 3
- 4 bedroom – 1
- 6 bedroom - 1

The figures for Northmavine show that while affordability will be an issue for some households, due to the low average incomes in Northmavine, the average house price in Northmavine is well below the Shetland average. The real issue faced in Northmavine is a lack of available housing supply and

while there is a good spread across property sizes, there is a need for more properties to meet both local and incomer needs and aspirations.

A key issue for the housing market over the coming months and years is going to be the sudden and sustained increase in interest rates, making borrowing much more expensive than it has been for the last ten to fifteen years. This will increase issues around affordability and further impact on the volume of sales and the number of new build house completions and renovations. This makes housing that can be provided by Shetland Islands Council, Hjaltland Housing Association and potentially the Northmavine Community Development Company all the more important to filling the expanding gap in the market for affordable housing.

The housing stock figures above show that there are a number of empty properties that it might be possible to bring back into use. If more of these properties became available for renovation it would help increase the supply of housing that could be renovated and then lived in. Some of these empty properties may well be crofts, with more complicated issues around use and renovation that would need to be considered.

Rental Figures

Private Rental Market

It is very difficult to properly assess the private rental market in areas like Northmavine as there are only seven registered private lets in Northmavine and those figures will not include private rentals where the landlord is renting to family members or tied accommodation linked to employment. A significant proportion of properties will be let by word of mouth and that makes identifying rent levels particularly difficult. An assessment of local letting agents found no properties in Northmavine listed for rent at present.

Regulation of the private rented sector is being further enhanced by the Scottish Government, with increased tenants' rights, restrictions on rent increases and evictions and increases in the requirements around energy efficiency are expected to increase pressure on the private rented sector as some landlords look to either sell up or move to short-term letting. The increase in interest rates over recent months will add additional pressure to landlords that have mortgages on the properties they rent out, particularly if they are unable to increase rents to help meet additional costs. These changes to national legislation and monetary policy may well have a negative impact on the availability of private rented property in Northmavine.

In terms of demand for private rented accommodation, one respondent to the housing needs survey related that they had recently let a property and had received significant interest in the property from five households, all of which currently live outside Northmavine. The property had only been advertised on the Northmavine Community Development Company Facebook page and all five households had been in touch within ten days. This shows that while there is limited quantifiable demand for housing in Northmavine, there is quite significant demand for the few properties that do become available.

Social Rented Housing

Both Shetland Islands Council and Hjaltland Housing Association have quite significant housing stock in Northmavine. Hjaltland Housing Association has 32 properties, while Shetland Islands Council has

40 properties on Northmavine. The table below shows a breakdown of the stock by area and bedroom size.

	1-bed	2-bed	3-bed	Total
Eshness	0	0	2	2
Hillswick	10	2	8	20
North Roe	4	2	5	11
Ollaberry	4	0	10	14
Urafirth	4	4	7	15
Sullom	0	6	4	10
Total	22	14	36	72

(Source: Shetland Islands Council and Hjaltland Housing Association)

The table outlines that Northmavine has a good spread of social rented housing both geographically and in terms of property size, particularly if retaining and attracting families is a high priority. However, there aren't many two-bedroom properties and a lot of the one-bedroom properties are centred in Hillswick.

The table below shows the breakdown of applicants for social rented housing in Northmavine. 36 of the 53 applicants live outside of Shetland, with 5 already living in Northmavine and a further 12 living elsewhere in Shetland. 1-bedroom properties are the most popular followed by 2-bedroom properties.

	1-Bed	2-Bed	3-Bed	4+ Bed	Total
Applicants that live within the Northmavine area	<5	<5	0	<5	5
Applicants from elsewhere in Shetland	9	<5	0	<5	12
Applicants from outside Shetland	20	6	7	<5	36

(Source: Shetland Islands Council)

With a high percentage of the social rented housing demand coming from outside Shetland it is difficult to say how many of these households are specifically focused on areas within Northmavine or if they have chosen Northmavine alongside a number of other areas in Shetland. It is also very difficult to predict what percentage of these households would actually accept an offer of housing should they be offered a property.

Applicants can choose as many areas as they want on their application form and the table below outlining the total number of applicants for each of the areas that the Shetland Islands Council has housing stock in Northmavine shows that the majority of the applicants for each bedroom size are picking most if not all of the four potential areas. Of the 53 total applicants looking at Northmavine North Roe is the area with the smallest number of applicants, but it still has 39 of the 53 households stating that they would be interested in living in the area.

	1 bed	2 bed	3 bed	4+ bed	Total
Hillswick	28	8	6	0	42
Ollaberry	27	6	7	4	44
North Roe	22	6	7	4	39
Urafirth	25	6	6	4	41

(Source: Shetland Islands Council)

There are two potential reasons for this. The first is that as the majority of households looking for social rented housing in Northmavine are from outside Shetland it is possible that a lot of these households do not know Shetland well and they have selected a significant number of areas on their application form, including the areas within Northmavine. In general these households may well be less likely to bid for or take up the offer of a house should one become available as they are not specifically focused on Northmavine as a place to live. In general, it is more likely for households already in Northmavine and wider Shetland to pick specific areas that they want to live in and not pick specific areas that they don't want to live in as they know the area better. This is not always the case though.

The other potential reason is that a number of households are keen to move to or remain in Northmavine in particular and because of the low turnover in social rented housing stock they have chosen all four areas to maximise their potential of getting a house. This is probably the least likely of the two options.

For 2021/22 there were four Shetland Islands Council re-lets and two Hjalmland Housing Association re-lets. Between August 2022 and June 2023 there have been two Shetland Island Council re-lets in Northmavine. One in Ollaberry and one in North Roe. These figures show that a very small percentage of applicants are actually being rehoused due to the very low turnover in social rented housing stock. The areas of Northmavine are not unique in this regard and a similar picture is painted across many other communities in Shetland.

Figures from Hjalmland Housing Association provide a very interesting view on demand for properties in Northmavine over the last five years. Hjalmland Housing Association operates a Choice-Based Lettings policy which requires applicants to register their interest for any vacant property that is advertised. This provides a very good indication of demand for social rented housing in the area in question. The table below shows a steady increase in the number of applicants for vacant properties, particularly from households elsewhere in Shetland and from outside Shetland. The fact applicants from out with Shetland are increasingly bidding for property in Northmavine shows a move towards active engagement by these households for property within Northmavine specifically, rather than just sitting on a waiting list for lots of different areas waiting for a property to be offered.

This increased demand from outside Shetland and elsewhere in Shetland is a positive. Applications from within Northmavine itself have remained low and the analysis of the housing needs survey, outlined in a later section of the report, shows that while respondents think affordable rented housing and low-cost home ownership are the key tenures required in Northmavine, when looking to move themselves respondents favour properties to purchase and empty homes to renovate.

Area	Size	Number of applicants	Northmavine applicants	Other Shetland applicants	Outwith Shetland applicants
Sullom	2 Bed	1	0	1	0
Hillswick	1 Bed	3	0	2	1
Hillswick	1 Bed	4	1	2	1
Hillswick	3 Bed	3	1	1	1
Hillswick	1 Bed	5	0	4	1
North Roe	3 Bed	1	0	1	0
Hillswick	1 Bed	9	2	5	2
Hillswick	3 Bed	21	1	8	12
Hillswick	3 Bed	16	0	8	8
Sullom	2 Bed	13	1	7	5

(Source: Hjaltland Housing Association)

As well as general needs housing stock Shetland Islands Council also have some sheltered housing in Northmavine. Sheltered housing is aimed at people who require some support, but properties can be let to general needs applicants if there aren't sufficient sheltered housing applicants for vacancies.

The combined total of 72 social rented properties located in Northmavine is quite significant for an area with around 335 households. However, the social rented housing stock only makes up around 18% of Northmavine's housing stock, which is lower than the estimated 23% Shetland average. With estimations showing a very small private rented sector in Northmavine making up less than 1% of housing stock, compared to the 4% Shetland average, rental housing in Northmavine is below the Shetland average.

Shetland Islands Council Engagement

As part of the housing needs analysis process a discussion was held with the head of Shetland Islands Council's Housing Service. This conversation was very useful and brought a strategic Shetland perspective. The senior manager didn't feel there was adequate quantifiable demand within Northmavine to necessitate the development of additional housing within Northmavine. She expressed concern that as there is limited demand for the social rented housing currently available through Shetland Islands Council and Hjaltland Housing Association that any additional affordable rented housing that might be developed may potentially remain empty for some time. This would obviously not be ideal and may put some financial pressure on the Northmavine Community Development Company.

When asked about the potential for housing to attract households to take up work with local employers who are looking for additional labour she was sceptical that there was the need for

additional housing for this or that there would be the demand to move to the area. The Council's Housing Service feel that most households looking for housing in Shetland want to live more centrally in or near Lerwick.

She suggested that the mix of three one-bedroom properties and one three-bedroom property might not be a good split and that it may be more effective to consider two two-bedroom properties and one three-bedroom property. This may make the properties easier to let and would provide more flexibility. This was a good suggestion and was something that has already been discussed with the Northmavine Community Development Company through production of this needs assessment. On the employment front it was suggested that a formal arrangement with one or more employers on leasing one or more of the properties to their staff or new employees would potentially help reduce the risk of long-term voids. This is a good suggestion which may well help reduce the risks associated with the potential development of the Old Urafirth School and Schoolhouse.

Housing Needs Survey Responses

Responses Overview

As part of the needs assessment a Northmavine wide housing needs survey was undertaken to gauge the opinion of community members on the availability of and potential need for additional housing in Northmavine.

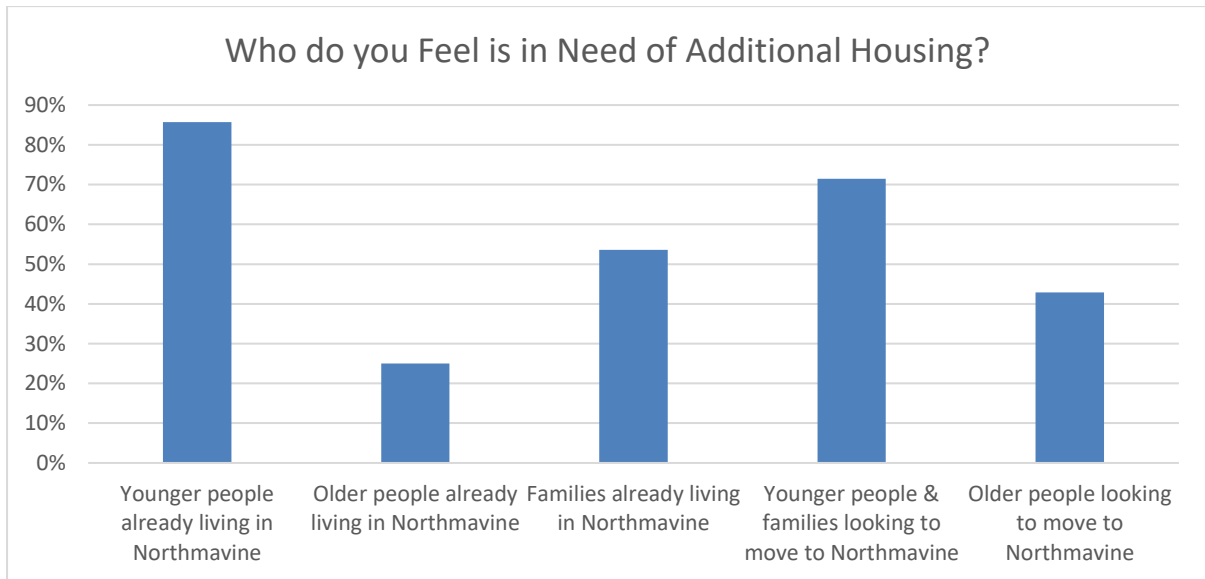
The survey was run over late June to late July, so was not helped by a clash with the summer school holidays. There were 28 responses in all indicating a 8% response rate from the estimated 335 households in Northmavine. This is not as large a response as we would like, however, the responses from those who did reply were very much in agreement about the need for additional housing in Northmavine. The results of the survey are outlined below.

Need for Housing

The vast majority of comments in the survey support the need for an increase in the amount and availability of long-term housing on the island. 96% of those who responded (27 of the 28) said they didn't feel there was sufficient housing in Northmavine. All 27 of the people who answered the question 'Do you support the Northmavine Community Development Company's proposal to purchase the Old Urafirth School and Schoolhouse and redevelop the buildings into properties available for affordable rent?' answered yes. This shows clear support for the development of additional housing for those who engaged with the consultation. However, the fact engagement levels were low potentially indicates that those who did not engage with the consultation may feel there is less of a need for additional housing. It is possible that due to the consultation taking place over summer and following on the back of another consultation on the community shop some who may have usually engaged did not on this occasion.

When asked who respondents thought needed the new housing they felt was required there was a split across different demographic types. 85% (24) of respondents picked younger people already living in Northmavine. The next highest score was 71% (20) for younger people and families looking to move to Northmavine. These results show the importance the community is putting into population and community sustainability and is in line with many other rural and island areas in Scotland. Additional housing alone will probably not persuade a significant number of young people to stay or move to the area, however, without the available housing it will be very difficult to retain

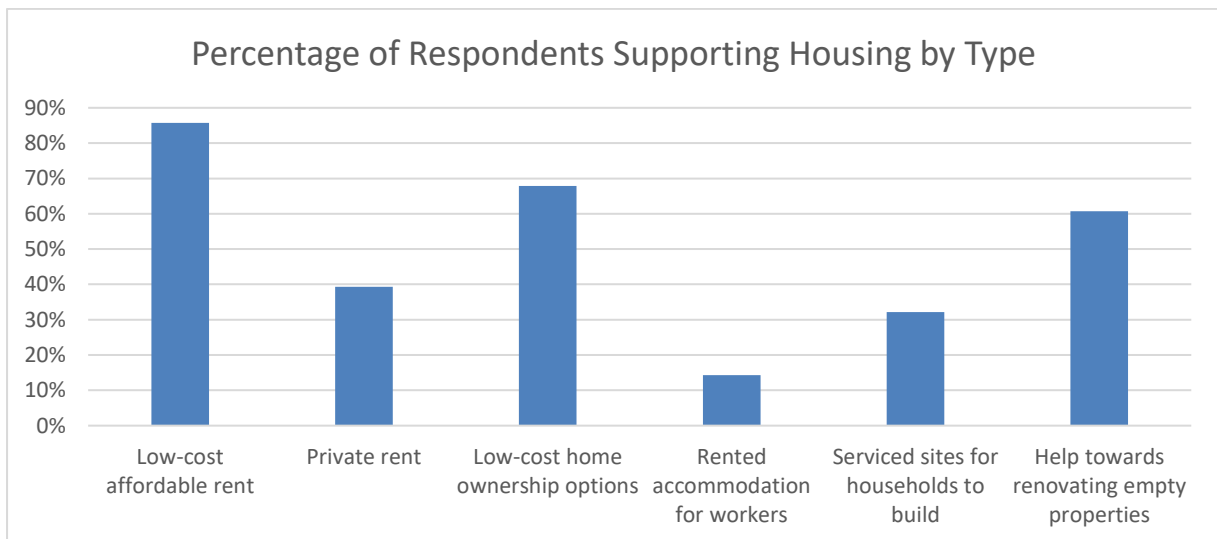
or attract younger people. The graph below outlines the household types that survey respondents feel would be the target of new housing development.



(Source: 2023 Northmavine Housing Needs Survey)

Housing Types

When asked about the type of housing that the community felt was needed low-cost affordable rent scored the highest with support from 86% of respondents. Low-cost home ownership came in second with 68% support and help towards renovating empty properties was third at 61%. Private rent, rented housing for workers and serviced sites all scored below 40% for support. The graph below outlines the responses.



(Source: 2023 Northmavine Housing Needs Survey)

These results show a leaning towards additional affordable housing provision, which makes sense when considering the perceived target market of local and incoming younger people and families.

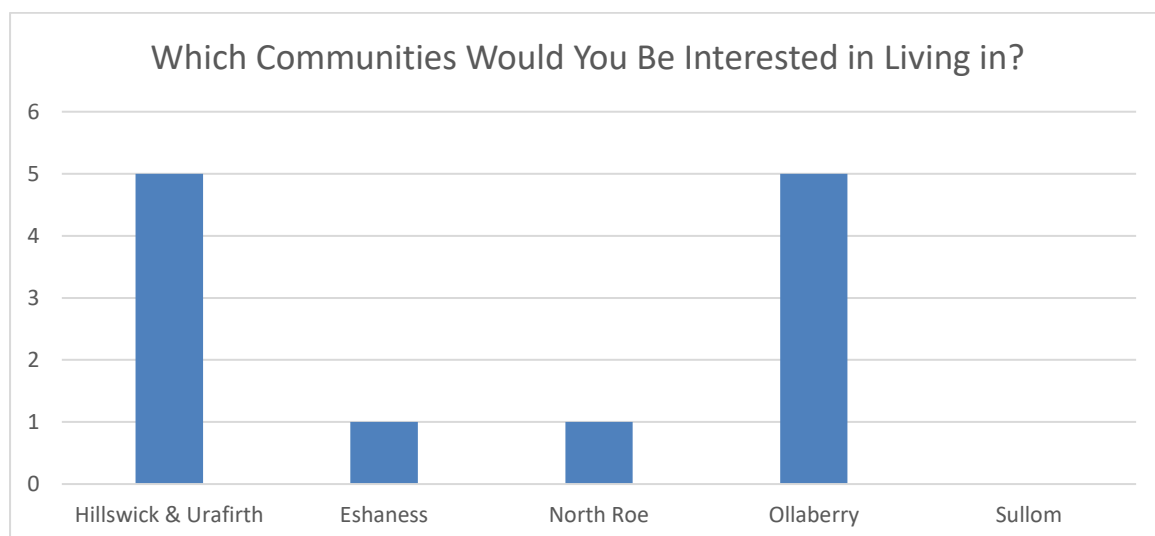
Perceived Local Demand

The vast majority of respondents (22) stated that their current accommodation was suitable for their needs. Only six respondents said that their accommodation wasn't suitable for their needs. Five of these households gave reasons why their current accommodation wasn't suitable. Two said it was too hard or expensive to heat, one said it was too small, another that the property was too large and the fifth that the property was in a poor state of repair. Three households could potentially have their property issues overcome with energy efficiency measures or repairs which would negate the requirement to move. Of the five households with property issues four have said they are looking to move. Three away from Northmavine and one that may stay in Northmavine or move away. 'To be nearer family and friends' was the reason given by two households, three households in total stated 'other reasons'. The household looking to remain in Northmavine stated that the reason they may look to leave is that they have been unable to find suitable housing in Northmavine. This shows that if there was suitable housing available one household at least would be considering staying within the community.

When respondents were asked if they were looking to stay in their current property, move within Northmavine or move away from Northmavine, 17 respondents answered that they were looking to remain in their current property. Four respondents said they were looking to move within Northmavine. Four respondents said they were looking to move away from Northmavine and two respondents said they were looking to either move within Northmavine or away from Northmavine. The final respondent didn't answer the question.

The paragraphs above show that the majority of households are happy with their current accommodation situation, but that up to ten respondents are looking for a move either within Northmavine or away from Northmavine. With the amount of property that comes up for sale and private rent it may prove difficult for the six households looking to remain in Northmavine to find accommodation, unless the properties being sold by or becoming available to rent from the potential departure of the four to six households looking to move away from Northmavine match with the housing needs of those households looking to stay.

When asked where they would like to move to within Northmavine twelve respondents replied to the question. The table below outlines the answers.

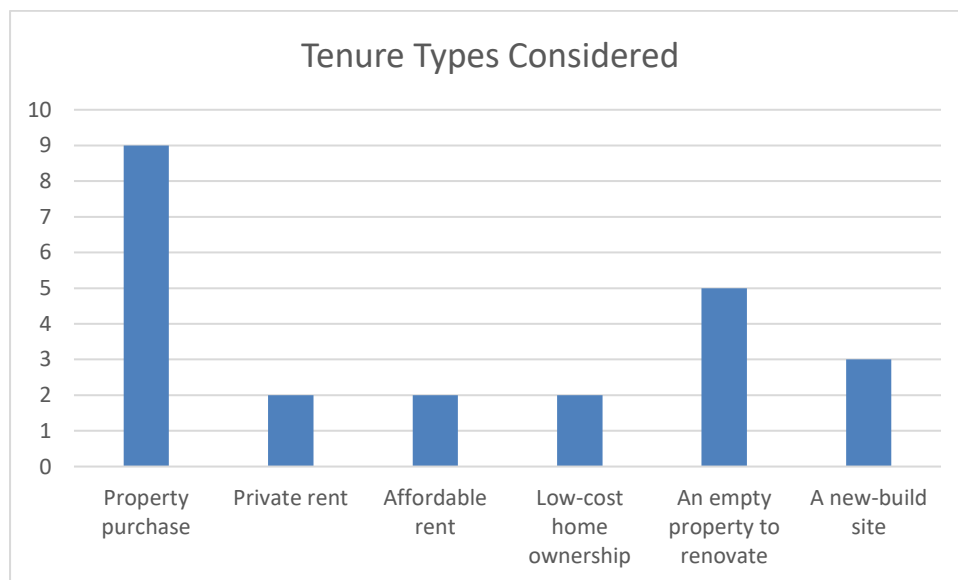


(Source: 2023 Northmavine Housing Needs Survey)

The main settlements of Hillswick and Urafirth and Ollaberry are far and away the preferred locations picked by respondents, which is not overly surprising. The fact the Hillswick and Urafirth area received a high response rate helps evidence the potential demand for a project at the Old Urafirth School. To try and engage more households a follow-up a poll was developed for the Northmavine Community Development Instagram page and a post asking people whether they would be interested in potential property in Urafirth was posted on Facebook. The Instagram poll received five votes in total while it was open. Three people voted to say they would be interested in three-bedroom properties in Urafirth and two responded to say they wouldn't be interested in Urafirth.

The Facebook post received three comments all of whom were very interested in moving to Urafirth. One household already lives in Northmavine, one is looking to move back to Urafirth and another is a household from outside Shetland who has just moved to Northmavine. While these are not the most scientific methods, they can help engage households who would potentially not engage via public meeting or survey. The fact that 6 different households expressed interest in housing in Urafirth from two short polls on social media, particularly households that are already in Northmavine or have previously lived in Urafirth, provides some additional evidence that there is housing demand for the area.

In terms of the tenure of housing desired by those who would potentially move within Northmavine 'property purchase' is understandably the strongest area of demand with nine responses. Surprisingly an 'empty property to renovate' was second on the list with 5 responses. All other options received two or three responses each. The table below outlines the results from the survey.



(Source: 2023 Northmavine Housing Needs Survey)

While affordable rented and low-cost home ownership were scored the highest in the question which about which housing types respondents felt were needed most in Northmavine, they both score poorly when households looking to move within Northmavine are asked about their

preferences. This may be down to a misunderstanding of affordable rent and low-cost home ownership being solely reserved for social housing, which has been the case elsewhere.

Perceived Incomer demand

When asked if they knew of anyone looking to move to Northmavine 13 of the 27 respondents who answered the questions said that they did know someone looking to move to the area. These figures are supported by the example given in the Private Rented Sector section above which outlines an experience of a private landlord who had 5 applications for a single property in less than 10 days. These examples show that there is already some latent demand from those outside Northmavine for housing within the community, which helps provide support that there is and will be demand for any properties developed in Urafirth should the Northmavine Community Development Company proceed with the project.

20 of the 28 respondents felt that housing was needed for younger people and families looking to move to Northmavine. These figures show an expectation within the community that households are looking to move to Northmavine. The figures in the report above show some demand for housing through Hjaltland Housing Association's Choice Based Lettings approach, however Shetland Islands Council believe there is little demand for housing in Shetland's more areas from people from out with those areas and out with Shetland.

Support for Proposed Projects

The results of the survey show considerable support for both additional housing within Northmavine and for the Northmavine Community Development Company's desire to purchase the Old Urafirth School and Schoolhouse. 96% of those who responded (27 of the 28) said they didn't feel there was sufficient housing in Northmavine. All 27 of the people who answered the question 'Do you support the Northmavine Community Development Company's proposal to purchase the Old Urafirth School and Schoolhouse and redevelop the buildings into properties available for affordable rent?' answered yes.

Conclusions

The above analysis has provided an overview of the various factors which will impact housing need and demand within Northmavine.

The housing needs survey and other conversations with businesses show that there is significant support for both additional housing being developed in Northmavine and for the Northmavine Community Development Company purchasing the Old Urafirth School. The local employers spoken too as part of the needs assessment also expressed concern about the lack of local labour available to help meet the job opportunities that are available in Northmavine. Survey respondents interest in housing in the Hillswick and Urafirth area is also a positive sign. Survey respondents also feel that additional housing is required for local young people in particular, but there is also a feeling from residents that there are households outside Northmavine who are looking to move to the area, but the lack of available housing is making this difficult. These same concerns and desires are expressed by various communities throughout the Highlands and Islands that are looking to sustain and enhance their community. Because of these and similar concerns and aspirations the Scottish Government has developed the Rural and Islands Housing Fund and the Scottish Land Fund has also been established to help communities take opportunities to develop projects that will help sustain

and grow their communities. The Northmavine Community Development Company should be applauded for looking to join the increasing number of communities looking to take action and enhance the sustainability of their community.

While support for additional housing within the community is strong, there is limited quantifiable local demand from households looking to move to Northmavine or currently living in Northmavine in accommodation that does not meet their needs. While there is belief that households from outside Northmavine are looking to move to the area, and some evidence to support this from engagement with the community through this process, this assessment, much like the 2018 assessment before it has struggled to identify many specific households either in Northmavine or from outside Northmavine that are either requiring or wanting housing within Northmavine in general and Urafirth in particular. While one or two households have been identified it is impossible to say whether they would actually take up a property if it was offered to them. This does not mean there is not a need or demand for additional housing in Northmavine, however it does make the development of an initial project containing three or four properties at the Old Urafirth School a potential risk.

Shetland Islands Council's Housing Service are sceptical that there would be demand for additional housing in Northmavine, feeling that the vast majority of housing demand in Shetland is in and around Lerwick, with households preferring to move from the more remote areas closer to the central areas. While demand in central areas is certainly higher than more remote areas, much like in other rural and island areas within the Highlands and Islands, this does not mean that there are not households who would move to Northmavine if sufficient housing was available. Communities all over remote rural and island Scotland are looking to develop additional housing to help sustain their communities, despite forecasts of continued population decline.

Some of the conclusions of this report are similar to the conclusions of the needs survey undertaken in 2018 which covered Northmavine and the West Mainland of Shetland. Both reports agree that there is certainly unmet demand for additional housing, a desire within the community to see more housing developed and a feeling that the lack of available housing is stopping people who may be looking to return or move to Northmavine from doing so. However, much like the 2018 survey it has not been possible to identify many specific households who would look to move back to Northmavine or are already in Northmavine with specific housing needs that could be met by the Old Urafirth School project. However, the desire of both the Northmavine Community Development Company and the wider community to sustain and enhance the population of Northmavine and provide opportunities for households to remain or move to the area, as well as support local businesses provides a clear desire to develop additional affordable housing with the aim of attracting households from outside Northmavine.

If the Northmavine Community Development Company can align with one or more local employers and undertake a suitable engagement and publicity exercise to try and attract the households many in the community feel are interested to move to Northmavine, as well as other households who may not yet know about Northmavine and what the community has to offer, it is very possible that the development of something like the Old Urafirth School into potentially a three-bedroom house, one two-bedroom town house style property and one one-bedroom flat would attract households to the area who could help sustain and enhance the community.

Recommendations

Following the analysis and conclusions above there are a number of recommendations for the Northmavine Community Development Company to explore.

The first recommendation is that the Northmavine Community Development Company engage with the Shetland Islands Council around the potential purchase of the Old Urafirth School and the general desire to develop additional affordable rented housing in Northmavine to support the sustainability of the community and the desire to attract more households to the area. The Northmavine Community Development Company should also look to reengage with the Scottish Government's Rural and Islands Housing Fund team to discuss opportunities and options with them.

The next recommendation is for the Northmavine Community Development Company to start an expressions of interest list for those looking for housing in Northmavine. While it is currently difficult to provide quantifiable evidence of housing need in Northmavine there is quite a lot of evidence pointing towards there being at least some interest from people looking to move to Northmavine. Should the Northmavine Community Development Company develop a list with quantifiable figures outlining who would like to move to or need rehousing to remain in Northmavine, what type and size of housing would be required and the locations these households would realistically consider it will help reduce the risk of any potential project and hopefully provide the evidence the Council and others may desire.

The next recommendation is to look at reducing the proposal for the Old Urafirth School from three one-bedroom flats to two two-bedroom flats (if possible) or one two-bedroom and one one-bedroom flat to go along with the three-bedroom schoolhouse. This would provide a more flexible development which would reduce the risk of having four smaller inflexible one-bedroom properties which might carry a higher risk of potential costly void periods where the Northmavine Community Development Company may potentially be unable to rent one or more of the properties.

An alternative option would be to demolish the Old Urafirth School, but not the three-bedroom Schoolhouse, and develop two new build two-bedroom bungalows slightly further into the site. This would potentially not cost any more, would provide some additional privacy for the Schoolhouse and would allow for a better site layout to be considered. There would also be the potential to include one or two self-build serviced sites in this development.

Should the Northmavine Community Development Company feel the development of three properties at the Old Urafirth School is too much of a risk for an initial housing development project it is recommended that they potentially look to purchase either an empty property or new build site where they could develop a single property in the first instance to gauge demand for additional housing.

Finally, as there was significant interest from the housing needs survey in the redevelopment of empty properties the Northmavine Community Development Company may want to explore the potential of a matchmaker service linking empty home owners in Northmavine who would be willing to sell their property's to households looking to potentially purchase and redevelop an empty property. It is recommended that should this be something the Northmavine Community Development Company would like to explore that they contact the Empty Homes Partnership based in Shelter Scotland who can provide some support and advice. This recommendation will have some

complications due to the potential that a number of the empty properties that may be available may be crofts, however, it provides the potential for the Northmavine Community Development Company to help facilitate additional housing development in Northmavine, without the need to develop all of it themselves.