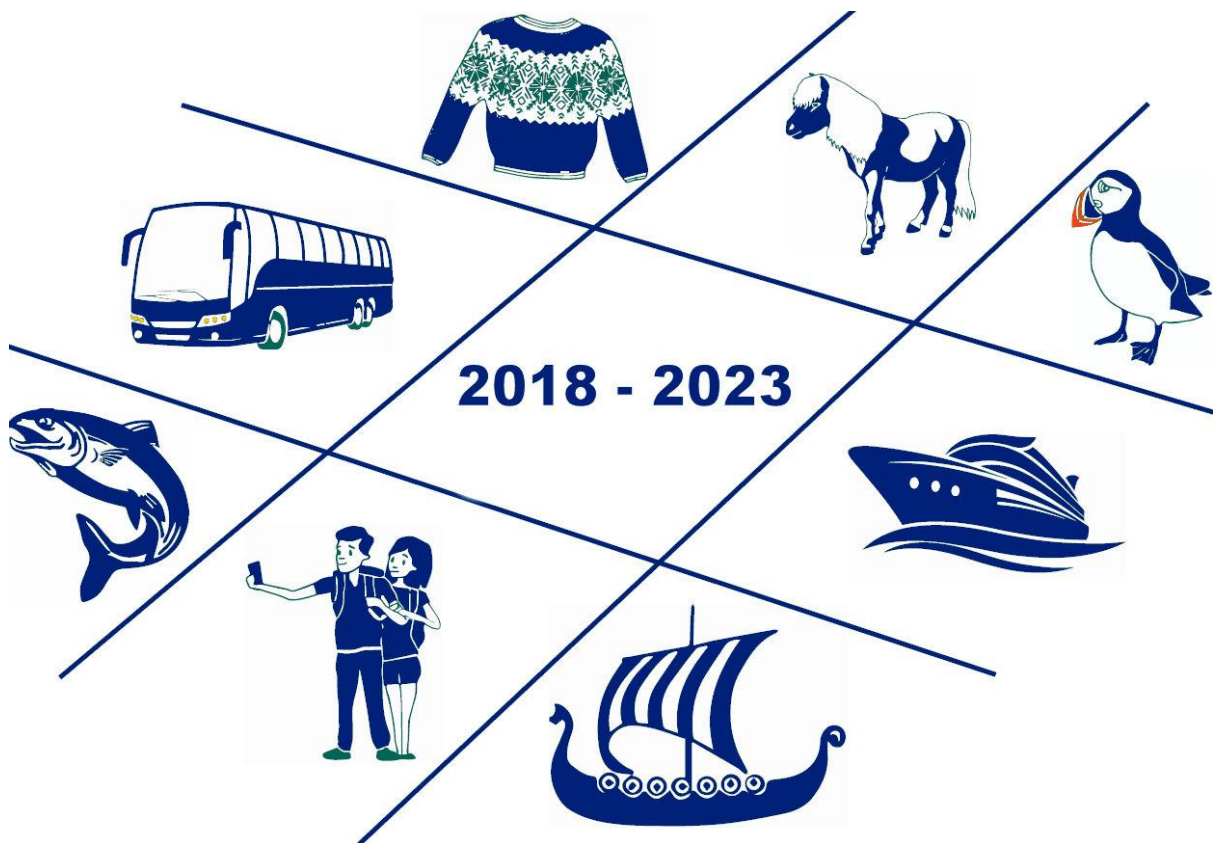




# Shetland Tourism Strategy





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## 1. Introduction

This document details Shetland's Tourism strategy and action plan for 2018-23. It builds on the positive outcomes achieved from the previous strategy, which ran from 2011 to 2014, and identifies the strategic aim, priorities and activity areas that the partners will pursue over coming years.

## 2. Who is responsible for the strategy?

This document has been prepared by an informal partnership of stakeholders<sup>1</sup>, from the private, public and voluntary sectors, interested in developing and promoting Shetland's tourism economy. This partnership will remain engaged during implementation of the strategy. It is also intended that the tourism industry, led by Shetland Tourism Association (STA) will take the lead in facilitating action; monitoring progress and revisiting priorities, supported by the public sector and other partners.

## 3. Why do we need a tourism strategy and how will it be used?

The purpose of the Strategy is to ensure maximum benefit to Shetland is realised through the tourism sector. This will be a living document, subject to regular reviews and updates to ensure that it remains relevant to the sector's needs and potential. This flexibility is important given that over the course of the next five years, new challenges and opportunities will arise about which we are currently unaware. We also recognise that some of the identified activity areas are at an early stage of development. Over the course of the five-year period some may fall away, others may develop into clearly defined projects which look different to when we started, and new activity areas may emerge.

Collaboration will be key to success, hence the strategy gives direction and identifies shared goals to work on for the next five years. The strategy aligns with Tourism 2020, Scotland's national tourism strategy. Having this strategy will also allow the identification of opportunities with which we can align ourselves with national and international campaigns to maximise any derived benefit directly for the good of Shetland, e.g. "Year of" campaigns. It can help inform monitoring tools such as the Scottish Government's "National Tourism Development Framework" which in turn can help stimulate investment in Shetland.

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<sup>1</sup> This includes Shetland Tourism Association, Shetland Islands Council, Visit Scotland, Highlands and Islands Enterprise, Lerwick Port Authority, Shetland Arts Development Agency and Shetland Amenity Trust

## 4. How was the strategy developed?

In 2015 the STA undertook an extensive consultation process with its membership and wider industry. 126 businesses participated, giving their views on the main issues facing the tourism sector and their individual businesses, and how the industry might best respond to these. In 2017, a workshop with industry and public-sector partners took place, and this confirmed that the issues and opportunities from 2015 were still highly relevant. A further round of consultations was held with key Shetland organisations with an interest in the tourism sector, followed up with a workshop in early 2018 to discuss and agree key components of the strategy.

Consultations and events were complemented by a review of existing data on the tourism sector undertaken by EKOS Limited. This company also assisted in the process of pulling together all this work to form the strategy.

The strategy development process has focused on identifying gaps in, and on adding value to, existing development service provision<sup>2</sup>, and on those opportunities and constraints where partners can have an influence. Also, the strategy recognises that generally it is tourism businesses which will have to take action to address challenges or exploit opportunities. However, it is better that this is based on good quality market and other intelligence to help secure successful outcomes.

### Alignment with Shetland's Partnership Plan (SPP) 2018-28

The development of this strategy has coincided with the development of the Shetland Community Planning Partnership's Plan (also known as the Local Outcome Improvement Plan) 2018-28. The STA and the partners involved in developing this strategy fully support the overarching vision for Shetland as detailed in the SPP:

"Shetland is a place where everyone is able to thrive; living well in strong, resilient communities; and where people and communities are able to help plan and deliver solutions to future challenges".

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<sup>2</sup> For example, Business Gateway (SIC) already supports business start-up in tourism and HIE supplies support services to individual tourism businesses with growth aspirations. This service will not be impacted by the strategy except to the extent that it helps identify candidates for such support.

## Four SPP Priorities

PARTICIPATION	People participate and influence decisions on services and use of resources
PEOPLE	Individuals and families thrive and reach their full potential
PLACE	Shetland is an attractive place to live, work, study and invest
MONEY	All households can afford to have a good standard of living

This strategy is fully aligned to and will help to deliver positive outcomes in at least three of the four priorities above.

**PARTICIPATION** – This strategy is a tangible example of how the tourism community and local public-sector partners have come together to develop a shared vision to grow the tourism industry in Shetland.

**PLACE** – The attractiveness of Shetland’s unique environment along with its heritage, culture and community are central to Shetland’s “Unique Selling Point” as a tourism destination. The STA and partners are committed to growing the industry in a sustainable and an environmentally sensitive manner.

**MONEY** – the Tourism sector is a growing industry and can offer individuals, businesses and community organisations the opportunity to maximise their income, particularly in more remote and rural areas.

An Integrated Impact Assessment has been completed on this strategy.

## 5. Shetland’s Tourism Industry

Tourism makes an important, and a growing contribution to the economic health of Shetland. The latest data from the Shetland Visitor Survey indicate that between 2013 and 2017 visitor numbers grew from 64,655 to 73,262 – an increase of 13%. This increase was driven by more leisure visitors choosing to come to Shetland, up 43% since 2013, and this category now accounts for a majority of all tourism visits (52%). In contrast, the number of tourists visiting family and friends has fallen (down 23% over the period) and the number on business visits has remained constant.

The average spend per person per trip also increased substantially, up by 26% in nominal terms, from £251 in 2013 to £317 during 2017. Taken in conjunction with the increased

visitor numbers, the total value of visitors to the Shetland economy has grown from £16.2 million to £23.2 million between 2013 and 2017.

	<b>2013</b>			<b>2017</b>		
	<b>Number of visitors</b>	<b>Average Spend</b>	<b>Total Spend</b>	<b>Number of Visitors</b>	<b>Average Spend</b>	<b>Total Spend</b>
<b>Leisure</b>	26,702	258	6,875,929	38,096	343.32	13,079,187
<b>VFR</b>	11,412	169	1,924,899	8,791	191.48	1,683,383
<b>Business</b>	26,541	279	7,415,345	26,374	320.40	8,450,323
<b>Total</b>	<b>64,655</b>		<b>16,216,172</b>	<b>73,262</b>		<b>23,212,893</b>

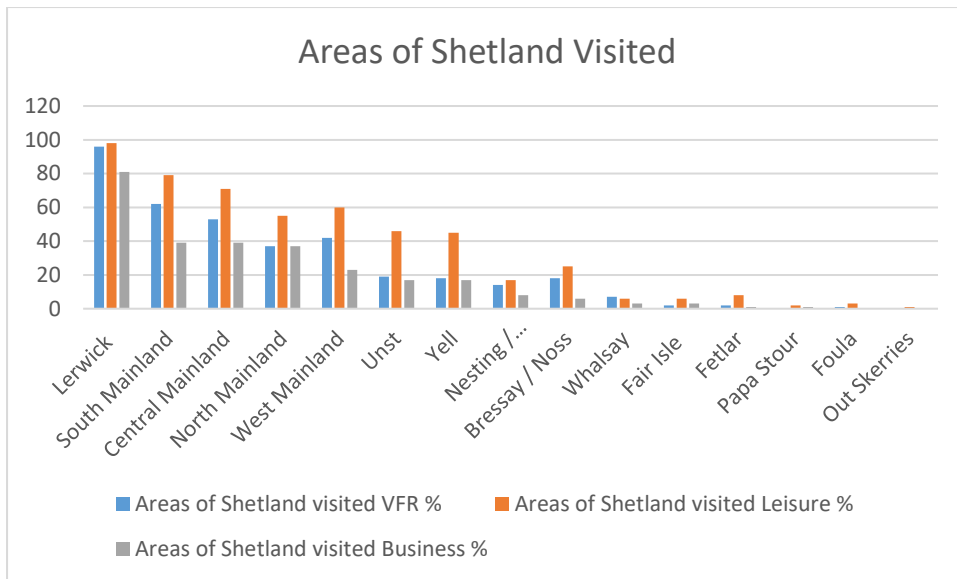
There is further evidence of growth from other sources:

- NorthLink Ferries and Sumburgh Airport have seen passenger numbers increasing since the early 2000s, peaking in 2015 but with a slight drop off since, felt to be due to reduced business-related traffic. Changes to the pricing of ferry services is expected to further boost use of the ferry, through the introduction of Road Equivalent Tariffs (RET) variant fares;
- there has been a large increase in cruise liner activity, with 70 liners visiting during 2017, bringing 52,000 passengers to Lerwick. (Note: visitor numbers exclude cruise line visitors).

The UK remains our strongest market, with residents from Scotland (45%) and elsewhere in the UK (32%) accounting for two-thirds of all visits in 2017. However, there has been an increase of 4% in visitors from overseas, especially from Europe.

Not surprisingly, much of the beneficial impact derived from tourism is concentrated in Lerwick and the Mainland as these areas are easiest to access (especially for short stays). 92% of all visitors during 2017 included Lerwick as part of their itineraries. However, tourism plays an important role in sustaining economic activity beyond the Mainland, in smaller settlements and islands where even a little increase in tourism activity, can have a proportionately large beneficial effect on their economic prosperity. During 2017, almost half of all leisure visitors (45%) included trips to Yell and/or Unst. Business visitors are much less likely to visit multiple locations.





Despite what is largely a good news story, the tourism sector does face some challenges. Not least of these is the seasonal pattern of activity, with most visitors coming during summertime. While there remains some spare capacity in accommodation during the summer, a critical constraint to growth is the limited capacity of the air and boat services which bring people to Shetland. In contrast, at other times of the year there is substantially more spare capacity available in accommodation and in transport services.

Thus, while there remains scope to increase activity and add value at all times of the year, the main challenge is to attract visitors out-with the summer months. Shetland has made some inroads into extending the season over recent years, with success stories such as Shetland Wool Week and rural attractions e.g. Heritage Centres opening by appointment during April and October or for occasions such as Up Helly Aa. We recognise, however, that more can be done.

## SWOT

Based on the consultations and data analysis, the partners compiled a SWOT of the Shetland tourism sector, to inform the selection of priorities and activity areas. This is shown below.

<p style="text-align: center;"><b>Strengths</b></p> <ol style="list-style-type: none"> <li>1. Unique heritage, culture, language, landscape, wildlife, environment</li> <li>2. Warmth of welcome</li> <li>3. Strong offering in arts and crafts, other cultural industries</li> <li>4. Strong brand and promotional mechanisms, including digital/online</li> <li>5. Strong community involvement/engagement in provision</li> <li>6. Good mix of museums, marine, sports and leisure facilities</li> <li>7. Festivals and events, some world-renowned</li> <li>8. Safe and clean environment</li> <li>9. UNESCO Global Geopark Status</li> </ol>	<p style="text-align: center;"><b>Weaknesses</b></p> <ol style="list-style-type: none"> <li>1. Cost of access</li> <li>2. Not a year-round destination with limited year-round facilities</li> <li>3. Industry fragmentation; lack of strong leadership</li> <li>4. Capacity constraints on air and boat services</li> <li>5. Accommodation mix and gaps – e.g. no “destination accommodation”</li> <li>6. Not maximising benefits from cruise market</li> <li>7. Variable service quality</li> <li>8. Limited eating options/use of local produce</li> <li>9. Difficult industry to attract young people into</li> <li>10. Declining access to public development funding</li> <li>11. Poor connectivity in some areas makes use of digital applications difficult</li> </ol>
<p style="text-align: center;"><b>Opportunities</b></p> <ol style="list-style-type: none"> <li>1. STA keen to strengthen their membership and leadership</li> <li>2. Scope to develop further shoulder season activity based on market opportunities</li> <li>3. Exploit the market from cruise liners further</li> <li>4. Strong digital platforms; good use of and interest in digital methods to attract visitors and engage with them</li> <li>5. Make more of existing assets and niche visitor experiences</li> <li>6. Maximise opportunities from festivals and events</li> <li>7. Improve awareness of what is on offer</li> <li>8. RET will reduce cost of travel to Shetland by boat</li> <li>9. Promote sector to young people</li> <li>10. Exploit Visit Scotland “Year Of”</li> </ol>	<p style="text-align: center;"><b>Threats</b></p> <ol style="list-style-type: none"> <li>1. Limited capacity on transport services especially in peak season months</li> <li>2. RET leading to capacity issues and visitor/resident conflicts</li> <li>3. Conflict between cruise and non-cruise activity</li> <li>4. Digital connectivity not addressed, falling further behind</li> <li>5. Future funding opportunities an unknown</li> <li>6. Brexit - perceptions of “welcome”; uncertainty impacting on investment, increased competition for labour with “better off” sectors</li> <li>7. Demographics and shortage of new entrants to labour market</li> <li>8. Reliance on volunteers to provide many of our attractions and services particularly heritage and local development groups</li> </ol>

This strategy and action plan seek to capitalise on the identified strengths and opportunities and address the threats and weaknesses identified by the sector, whilst recognising that we may not be able to exert significant influence over all of the threats.

Shetland has some key strengths, which in the main reflect our important assets – people, culture, environment, events, built attractions and services. We feel this is a strong offering and one that has played a key role in ensuring that most of our visitor’s report having had very positive experiences during their visits. 96% of visitors agreed they were made to feel welcome and 87% experienced excellent customer service.

Identified weaknesses relate to a mix of factors, including the cost of access by air or boat services. Indeed, 78% of the respondents to the STA's survey of its members and the wider industry identified costs of access as the main constraint facing the industry. This is seen as the main disincentive to travelling to Shetland, especially for family groups, as other destinations can be accessed at significantly less cost.

## 6. Strategic Framework

Our strategic framework defines the strategic aim for the period 2018 to 2023, along with the Priorities and Activity Areas we will pursue. This is shown below.



The overall goal of this strategy will be to continue to grow our visitor spend, current visitor spend is £317 per person (Leisure £343, VFR £191 and Business £320).

At the time of the 2013 visitor survey the value of our visitor spend was £16.2 million. By 2017 it had grown to £23.2 million. It's our ambition to achieve £33.5 million of visitor spend by 2023 (the lifetime of this strategy).

Year	Spend
2013	£16.2m
2017	£23.2m
2021	£30.2m
2023	£33.5m

## Strategic Aim

There is a strong consensus amongst partners that there is little need for dramatic change from the previous strategy and that we should continue to focus on efforts to make Shetland a year-round visitor destination. We must also ensure an appropriate emphasis on securing the sustainable development of a high-quality tourism offering.

Increasing visitor numbers is generally welcome, whenever it occurs, but there is relatively more capacity to cope with increased visitors outside of the peak summer months.

Conversely, at other times there is substantial spare capacity, except during major events such as Up Helly Aa and Wool Week where we have already made a difference. Even utilising only a small proportion of this spare capacity could help make the difference for many tourism businesses, especially those in the accommodation and hospitality sectors. In addition, benefits would spill over to the retail, cultural and creative, and other sectors.

Lengthening the season could increase the viability of a range of tourism businesses and community enterprises.

In light of this, we have adopted the following strategic aim:

***“We will work together to help make Shetland a year-round, sustainable tourism destination offering unique and outstanding visitor experiences.”***

We recognise that to attract a significant number of visitors in the shoulder seasons we will have to appeal to visitors who are seeking a distinct experience that matches their interests

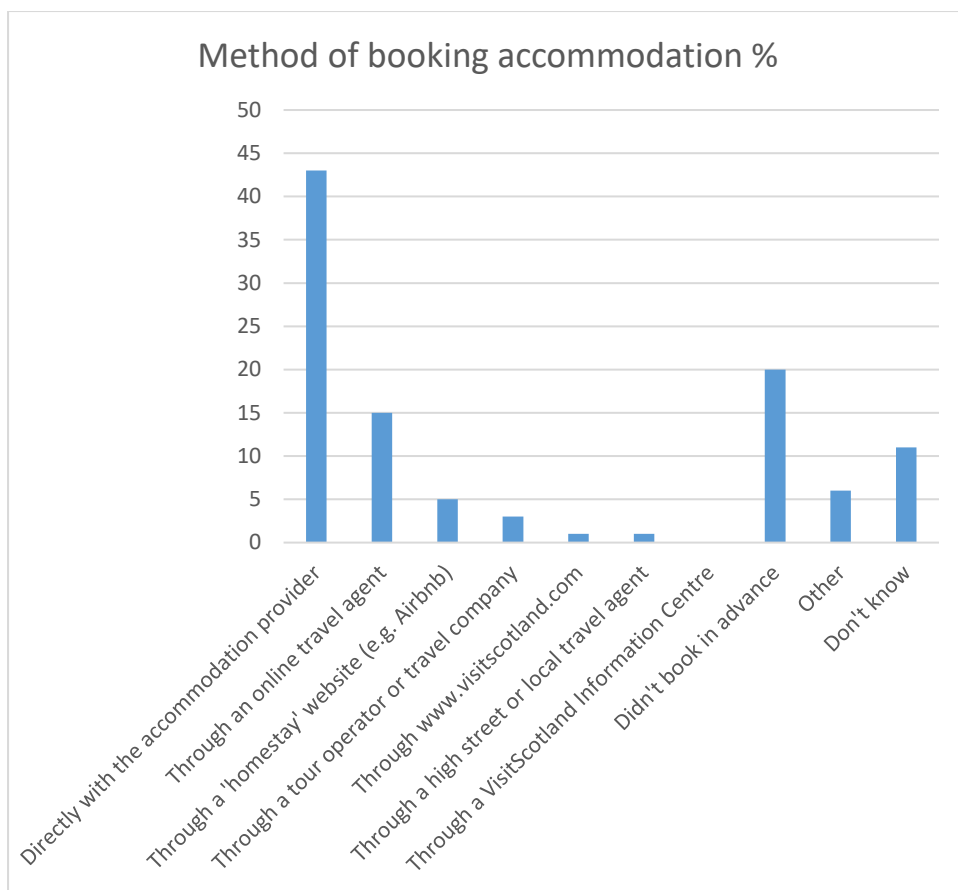
and aspirations. Success in this area is likely to rest on collaborative working to develop organised activities associated with a theme, event or happening e.g. Geology, heritage related festivals and learning opportunities, activity holidays, wildlife watching, northern lights and so on. Innovation will be key to achieving this aim.

Extending the season will not be our sole focus. There are other important challenges and opportunities to be addressed, including some which are not directly related to the aim of encouraging year-round visits. For example, we can do more to take advantage of the increasing number of visiting cruise liners and help to generate more business for shops, restaurants, guides, visitor attractions and other services. It will also be important to ensure any potential negative impacts of high volume cruise visitors are managed.

## **A Strong Digital Theme**

Shetland has already benefited greatly from the use of digital platforms. The [www.shetland.org](http://www.shetland.org) portal has been invaluable in generating interest among potential visitors, and providing them with the information needed to help turn their interest into actual visits. According to the 2017 Shetland Visitor Survey 64% of visitors used the [www.shetland.org](http://www.shetland.org) site to find out about Shetland prior to visiting.

Many individual businesses have benefited from an online presence, and for many this is now a major source of bookings. Again, the 2017 Shetland Visitor Survey showed that 43% of visitors book their accommodation directly with the provider. To do this 44% use the provider's website and 43% use email.



The partners believe there are substantial opportunities to further exploit digital solutions in terms of tourism management, generic promotion and sharing intelligence. Any tourism organisations without an online presence must be encouraged to create one and others must be encouraged and enabled to further develop and manage their online presence.

Digital will be a key theme throughout the strategy and will influence most activity areas and potential solutions developed.

## Strategic Priorities

We have selected three priorities, corresponding to key challenges and opportunities, and through which the partners can make a difference by helping to identify, promote, support and/or sponsor appropriate responses.

The three priorities are:

**Priority 1 – Leadership and Collaboration:** Shetland's tourism sector is largely made up of small enterprises with limited capacity to give time and effort to building a strong and fully representative tourism association. This is limiting the tourism sector's ability to: communicate its needs and its opinions on important developments such as transport;

ensure the sector is connected and informed; pursue common goals including collaborations with other sectors; influence agencies and how they are engaging with the sector.

**Priority 2 - Exploiting opportunities:** Shetland has unique strengths – our people and our distinctive culture, our landscapes, scenery and other natural assets, and our geographical position “most northerly” in the UK. These are among the main attractors for visitors, with many coming to enjoy the scenery, the wildlife, or any of a variety of cultural, marine, leisure, sport and other activities, all available within a safe and welcoming environment.

Many of Shetland’s strengths match well with wider tourism trends, with increasing demands for authentic experiences; places further from the tourism hot spots and in niche markets such as activity, wildlife, marine, geology, and slow tourism. There are undoubtedly opportunities to better exploit these local strengths, especially as part of wider efforts to lengthen the tourism season.

The challenge will be to work out what more can be done to reach visitors interested in our niche opportunities and ensure maximum return (particularly out with the main season).

**Priority 3 - Enhancing the visitor experience:** while most visitors to Shetland are more than happy with the quality of tourism services and general levels of customer care, it is important to sustain and further improve on this if we are not to lose out to other destinations. We want to share and promote leading practice and encourage others in the sector to adopt such practices.

We also recognise that our online presence, use of social media and other digital tools can be a very effective way of managing our customer journeys, exceeding expectations and ultimately getting our customers to do our marketing for us. We want to keep abreast of tools and technologies that support this and ensure the sector can use them to their advantage.

## **Activity Areas – Leadership and Collaboration**

### **Priority 1**

- ➡ Developing a strong industry led organisation
- ➡ Collaboration
- ➡ Sharing Industry Intelligence to inform and improve

There are three activity areas for this priority which seek to develop leadership and collaboration, and to improve sector intelligence.

### **Developing a Strong Industry Led Sector**

The business base of the Shetland tourism economy is dominated by micro and smaller businesses, owned and managed by sole traders, family concerns, community enterprises. In addition, activity is dispersed across the islands, and many businesses can operate very much in isolation from their peers. There are also various communities of interest – accommodation providers, bars and restaurants, guides, visitor attractions, transport service providers, etc – which often fail to recognise their common interests and that, sometimes, by acting together, they can achieve more.

STA has worked hard to be the voice of the sector and build a membership. However, it is recognised that despite a desire to grow its role and membership, lack of time and resource to provide a consistent, valuable and sustainable service to its members currently limit this happening. This strategy recognises the potential of the tourism business base playing a stronger role in the development of the sector, if supported and resourced to do so.

This activity area will involve investigating how we can build an industry led organisation which:

- helps to build sector cohesiveness;
- represents the interests of the sector, through local forums as well as via relationships with relevant national and local government bodies;
- encourages and supports collaborations, both between the tourism and other sectors and between tourism businesses;
- lobbies for its members' interests on and off Shetland;
- collates and disseminates intelligence on sector trends, issues and opportunities; and
- supplies other services in line with members' needs.

Currently, the STA is the main industry body and will take the lead on developing proposals.

### **Collaboration**

Collaboration will be key to maximising impact for all. A key issue is the cost of getting to Shetland, a major barrier to expanding the market. The Shetland transport strategy refresh of June 2018 proposes specific interventions to mitigate the cost of getting transport, including involvement in specifying the new Northern Isles ferry contract; working with the



government to reduce ferry fares; new route development; and new ticket product development. This is an area where through ZetTrans and the STA could work together to reduce the major barrier to development identified.

Shetland has strong offerings in other sectors closely related to tourism, such as food production and processing, and cultural and creative industries. Good relationships exist across sectors and between key partner organisations. However, there is a need to identify clearly where further collaboration such as the ZetTrans example, can lead to mutual benefit and to develop actions and projects to take this forward.

Likely partners in collaboration will include STA, Shetland Food and Drink, Shetland Arts & Crafts Association, Shetland Recreational Trust, Shetland Arts Development Agency, Shetland Amenity Trust, Shetland College, local development groups and the many other community organisations across Shetland who play an active role in tourism provision.

Agencies/partners such as SIC, HIE, and Visit Scotland will take a pro-active role in supporting the Shetland Tourism Strategy and proposals and actions arising from it. These agencies will also ensure the sector is aware of current and pipeline funding opportunities and any other forthcoming resources for sector development. The funding landscape will change over the course of the strategy, with some periods being leaner than others. However, agencies will take an optimistic view that where a proposed development in the sector can demonstrate strong impact, investment will be found. A continuous supply of pipeline projects will be encouraged.

### **Sharing Intelligence to Inform and Improve**

Tourism intelligence comes from many sources e.g. Shetland in Statistics. This is published annually by Shetland Islands Council, drawing on many periodic Shetland specific surveys including Shetland Visitor Survey, Employment & Skills Survey, Input – Output Survey. It is intended the Shetland Visitor Survey (currently a collaborative piece of research by Visit Scotland and SIC) will be completed on a biennial basis, ensuring regular and up to date customer information for the sector.

We also have access to Visit Scotland market research, Scottish Tourism Alliance work and a range of ad hoc sectoral and thematic studies from local, regional and national organisations including HIE.

There is a need to ensure research data and other relevant information reaches the right audiences at the right time. There may be times when further research on a particular issue is required. Information sharing can also be about best practice, new providers, and encouraging tourism businesses to help each other.

At present, there is no co-ordinated and proactive approach to sharing tourism specific intelligence. It will reach tourism businesses via many sources or possibly not at all. It is recognised that were the STA to develop this function, supported by SIC and Visit Scotland, it could be a real benefit of being part of an industry led organisation and help ensure our tourism intelligence is used to best effect.

## **Exploiting Opportunities**

### **Priority 2**

- ➡ Low Season
- ➡ Cruise Liners
- ➡ Festivals and Events
- ➡ UNESCO Global Geopark Status
- ➡ Other Niche (history, archaeology, music, textiles, dialect, ancestry, wildlife, diving, sea kayaking, sailing, sea and loch fishing, crofting, Vikings, coastal scenery and walking, Northern lights, Simmer Dim as examples)

There are five, inter-linked activity areas for this priority, which will feed off one another. This is especially so for “low season” which will rely on progress for other activity areas, as these could identify specific actions for extending the season. The challenge is to maintain and grow the markets already attracted to what Shetland has to offer. We must expand our reach into markets that realise the high cost of coming to Shetland is outweighed by the unique, high quality visitor experience on offer.

### **Low Season**

The strategy will continue to prioritise efforts to attract more tourism activity outside of the main summer months. This can build on and feed off other activity areas, as well as a wider consideration of the available opportunities beyond those highlighted here. Action in this area could include a detailed look at the “hooks” that would bring visitors to Shetland in the

lean months and an assessment of the potential market and how Shetland could respond to this.

## **Cruise Liners**

An important development over recent times has been the growing number of cruise liners visiting Shetland. During 2017 cruise liners brought around 52,000 passengers to Lerwick. Although we do not have access to actual numbers of cruise visitors disembarking in Shetland, a study in Orkney (Ekosgen, Volume Tourism Management 2017) highlighted that 95% of cruise ship passenger and crew do disembark during stop overs. Lerwick Port Authority's experience is that most passengers do disembark and many undertake organised trips around Shetland.

This activity is concentrated during the summer months (although in 2018 the first ship arrived in March) and is forecast to grow even further - 2018 is expected to be a record year with 92 cruise liners scheduled to visit, bringing around 90,000 passengers. Further growth to 2019 is also expected.

While this is a very welcome development, local businesses have not yet been able to take full advantage of the opportunities that flow from cruise liner visits. Also, Shetland needs to plan ahead to ensure potential capacity issues that a high volume of day visitors can bring with them are avoided.

We are fortunate in that we can learn from others (Cruise Forth, Kirkwall), as well as from our own experiences. In addition, we can build on the work of the "Cruise Ship Group" comprising Lerwick Port Authority, SIC, Visit Scotland and others, which was convened to communicate and manage in this area.

Early discussions have included the potential to develop an online portal for independent cruise ship passengers, and the provision of targeted services and facilities close to point where visitors come ashore.

## **Festivals and Events**

Shetland plays host to a wide variety of cultural, sectoral and thematic festivals and events, some of world-wide renown, and these have been invaluable as a means of attracting visitors especially during periods when tourism activity would otherwise be at a low ebb. Up

Helly Aa, for example, helps to attract many visitors during late January and early February, while “Wool Week” helps to generate visits during late September.

There is, however, scope to better coordinate and to extend provision. Initially, a collaborative group around events and festivals could identify:

- a schedule of current and planned events;
- key gaps/opportunities;
- any new events that are worth pursuing;
- how to make best use of resources and the potential for resource sharing;
- necessary improvements in the information available for visitors, further use of the Promote Shetland portal for this;
- Opportunities for collaborative marketing.

### UNESCO Global Geopark

Shetland has achieved UNESCO Global Geopark status, one of only two in Scotland and there is a need to consider how to sustain accreditation and to interpret and enhance the links between geology and all aspects of Shetland heritage over the medium-term. A 5-year plan will be developed to ensure that Shetland maintains its UNESCO status and derives the maximum benefit from that status. This will include working with local businesses and communities and will be led by the Shetland Amenity Trust.



## Other Niche Markets

Shetland also has some strengths in providing specialist, unique holiday opportunities, be these related to the culture of the isles, or to its physical beauty and other assets. A current example is the popularity of the BBC crime drama, “Shetland” which is driving a significant number of visitors here. The partners believe that there remains scope to further exploit the opportunities available in many of these niche areas, with the potential impact being to lengthen the season. Developing internal flight tours is an example of a new product that could complement many of these niche market initiatives.

Work in these areas will include further “drilling down” into these niche areas to ascertain what further potential there is, the size and scope of the market and how these can be exploited.

## Enhancing the Visitor Experience

### Priority 3

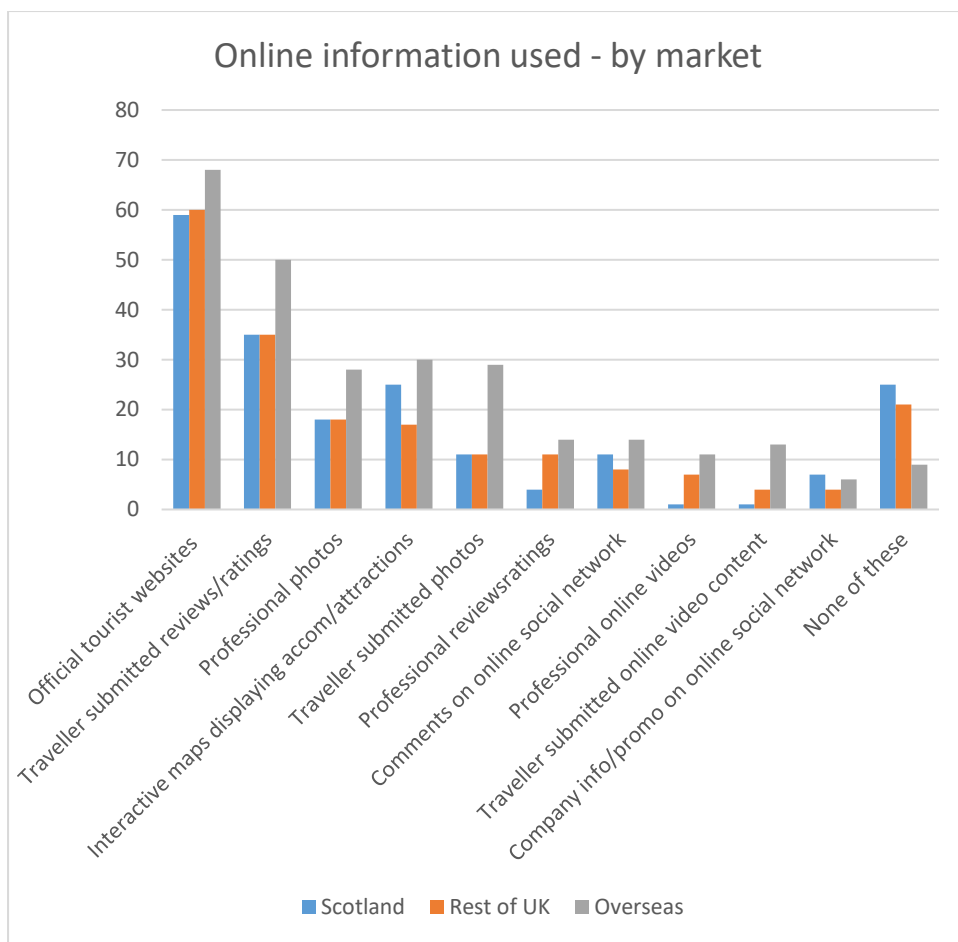
- ➡ Digital Promotion and Information
- ➡ Continuously improving visitor experiences
- ➡ A responsive and outward looking sector/digital business solutions

Our focus under this Priority will be on three activity areas: digital promotion and information, continuously improving visitor experiences, an outward looking and responsive industry.

### Digital Promotion and Information

Shetland was an early mover in exploiting online channels to promote and sell its tourism offering to the wider world, through publicly supported initiatives such as the Promote Shetland service. It is important to continue to build on this momentum. Recently the Promote Shetland service has led successful campaigns through collaborative activity, an effective model for future use.

Going forward, it is important the Promote Shetland service and the tourism sector continue to use digital tools to reach potential customers, support their customer journey, including up to date visitor information and encourage our visitors to share their positive Shetland experiences with others. The 2017 Visitor Survey illustrates the importance of up to date information at all stages of the customer journey.



To exploit the opportunities outlined in Priority 2, the sector will need to have strong digital campaigns, information and social media. This will require collaborative activity. Hence, digital promotion and information is going to be key to realising many of the priorities of this strategy. A current example of positive action in this area is ZetTrans (Shetland Transport Partnership) working with the Promote Shetland service to upgrade and enhance their travel app and website, resulting in much more user-friendly travel information.

### Continuously Improving Visitor Experiences

Overall, our visitors are very positive about their Shetland experience, the welcome they receive, the quality of services on offer, and standards of customer care. Our niche markets demand high quality service that match the price they pay for it. Hence, we need to keep striving for excellence and innovation in the delivery of visitor experiences and ensure that we respond to visitor feedback.

The 2017 Visitor Survey highlights a few areas where, although visitors are not expressing strong dissatisfaction, there is room for improvement.

These include-

- the range of things to do in all weather conditions and in the evenings
- European visitors feel less positive (64% rather than 96% overall) about their welcome
- We could do more to encourage visitors to behave in an environmentally responsible way
- Availability of free WIFI and 3/4G
- Some minority concerns about the value for money of accommodation
- The opportunity to attend local events and festivals
- Availability of local produce when dining out and value for money when dining out
- Signposting

Led by industry and working in partnership, where appropriate, we will aim to respond to these areas for improvement throughout the lifetime of this strategy.

### **A Responsive and Outward Looking Sector/ Digital Business Solutions**

We want to ensure our sector is well equipped to respond to visitor needs and to trends and opportunities within the industry. We believe exploiting digital solutions can help ensure we achieve this.

Many of our tourism businesses have already adopted and make good use of digital solutions through, for example, websites which enable direct accommodation bookings. However, this is a fast-paced arena and we need to keep up with new ideas, trends and technology. There is a need for further awareness raising and training in this area, building on provision such as Digital Tourism Scotland, Digital Boost, Visit Scotland Digital Health Checks and other programmes. One-to-one provision at entry level may be required for some businesses. We will work with local and national providers, to ensure we tailor provision to local need.

In addition to digital skills, there may be other skills development requirements as well as ensuring a flow of new entrants to the industry. We will work with organisations such as Shetland College, Skills Development Scotland, UHI to ensure local solutions to arising skills gaps.

## 7. Taking Action and Monitoring

STA will take a lead role in tracking progress of this strategy and action plan overall; encouraging activities to move it forward and identifying any barriers preventing progress. STA will also take responsibility for monitoring progress and targets in the activity areas. This will involve engaging with the lead partner for the activity area.

The STA will be responsible for bringing industry and partners together on a quarterly basis to ensure the strategy is driven forward and progress towards targets made. It is recognised that the strategy and action plan are working documents, providing a framework for tourism development in Shetland. As new opportunities and issues arise, the strategy and action plan can be revised accordingly. Also, as the capacity of the tourism sector develops, ambitions may change.

The Shetland Tourism Strategy will be a standing agenda item at every STA meeting, to ensure industry involvement.

The STA will take the lead on:

- annual updates to the Strategy and Action Plan;
- reporting back on progress to its membership and partner organisations; and
- reporting into the Community Planning Partnership Framework.

## 8. Action Plan

A detailed Action Plan has been developed by partners outlining activity areas for each of the strategy's priorities, partners involved, timescale and targets. This will be used by all partners in the strategy as an agenda for action.

## 9. References

The Shetland Tourism Plan 2011 – 2014 (Highland Business Research)

Shetland Visitor Survey 2012-13

Industry Engagement for the Shetland Tourism Strategy (STA)

Shetland Islands Visitor Survey 2017

Shetland in Statistics 2015-16

## 10. Partners

- Shetland Tourism Association [www.shetlandtourismassociation.com](http://www.shetlandtourismassociation.com)
- Visit Scotland - [www.visitscotland.com](http://www.visitscotland.com)
- Shetland Islands Council [www.shetland.gov.uk](http://www.shetland.gov.uk)



- NB Communication, who currently deliver the Promote Shetland. The service is funded by SIC and a 4.5 year contract is in place. The purpose of the contract is to promote Shetland as a place to live, work, study, visit and invest.  
[www.shetland.gov.uk](http://www.shetland.gov.uk) / [www.shetland.org](http://www.shetland.org)
- HIE – [www.hie.co.uk](http://www.hie.co.uk)
- Zettrans – [www.zettrans.org.uk](http://www.zettrans.org.uk)
- Shetland Amenity Trust – [www.shetlandamenity.org](http://www.shetlandamenity.org)
- Lerwick Port Authority – [www.lerwick-harbour.co.uk](http://www.lerwick-harbour.co.uk)
- Shetland Arts Development Agency – [www.shetlandarts.org](http://www.shetlandarts.org)

## SHETLAND TOURISM ACTION PLAN 2018-23

“We will work together to help make Shetland a year-round, sustainable tourism destination offering unique and outstanding visitor experiences.”

The goals of the strategy are –

- to grow visitor spend from £23.2 million in 2017 to £33.5 million of visitor spend by 2023.
- to increase tourism activity outside of the main season of May – September.

Volume and value of the tourism sector will be measured biennially through more frequent Shetland Visitor Surveys. This will also measure the change in visitor numbers outside of the main season. In addition, the Moffat Centre’s Scottish Visitor Attraction Monitor will provide data on the number of visitors to our key attractions and insights into seasonal trends.

Priority 1	LEADERSHIP AND COLLABORATION				
Activity Area	Description	Partners (lead in bold)	Timescale		Progress Indicators & Targets
			Development	Delivery	
<b>1.1 Developing a Strong Industry Led Sector</b>	<b>1.1.1</b> STA to develop a funding proposal for the growth and development of their organisation which includes a lead role in co-ordinating this strategy.	<b>STA</b> HIE	July/Aug 2018	Sept 2018 onwards	<ul style="list-style-type: none"> <li>- Funded post</li> <li>- Increased &amp; active membership</li> <li>- Greater recognition STA /tourism issues</li> <li>- Increase collaboration between tourism operators</li> </ul>

Priority 1	LEADERSHIP AND COLLABORATION				
Activity Area	Description	Partners (lead in bold)	Timescale		Progress Indicators & Targets
			Development	Delivery	
<b>1.2 Sector Collaboration</b>	<b>1.2.1</b> STA to collaborate with ZetTrans to address the issues of high cost of getting to and from Shetland. This will include involvement in specifying the new Northern Isles ferry contract, working with Scottish government to reduce ferry fares, new route development and new ticket product development. STA will articulate the 7 key messages agreed by the tourism sector (industry engagement 2015) in all transport discussions (see note 2)	<b>STA</b> Zetrans	September 2018	2018-23	STA active in Zetrans Key messages reach the correct forums Progress with transport issues
	<b>1.2.2</b> In partnership with Hitrans, explore the potential for a Scottish Islands Passport Scheme.	<b>Visit Scotland</b> ZetTrans	2018	2020	Active involvement from Shetland if scheme progresses
	<b>1.2.3</b> Use Visit Scotland, "Year Of" (a biennial campaign) to encourage collaborative activities	<b>Visit Scotland</b>	2018-19 for Year of Coasts and Water in 2020	2020-23	Shetland prominent in Year Of activities New collaborations between tourism operators
	<b>1.2.4</b> Encourage applications to the Visit Scotland Growth Fund	<b>Visit Scotland</b> STA	2019	annually 2019 - 23	At least 2 successful growth fund applications
	<b>1.2.5</b> Partner agencies will proactively support development proposals which will deliver strong impact, in line with the strategy. A project pipeline will be encouraged to ensure new funding opportunities can be taken advantage of.	<b>SIC</b> HIE Visit Scotland	2018	2018-23	Project pipeline in place; support to develop projects to "shovel ready" stage; successful funding bids

Priority 1	LEADERSHIP AND COLLABORATION				
Activity Area	Description	Partners (lead in bold)	Timescale		Progress Indicators & Targets
			Development	Delivery	
	<b>1.2.6</b> Support Shetland Food and Drink group to increase availability of local food and drink	<b>Shetland Food and Drink Group</b> STA	2018	2018-23	Good working relationship with STA/SF&DG established Increase in food tourism initiatives
<b>1.3 Sharing Intelligence to inform and improve</b>	<b>1.3.1</b> Commission a Visitor Survey biennially	<b>SIC Econ Dev</b> Visit Scotland	2019	2019-23	Survey completed and used by industry and partners
	<b>1.3.2</b> Ensure the Visitor Survey and other relevant research reaches the right audiences at the right time.	STA ZetTrans (re transport data)	2018	2018-23	Evidence of research being used by industry
	<b>1.3.3</b> Encourage tourism organisations to share information with STA for distribution e.g. emerging issues, updates on Shetland products and services	STA	2018	2018-23	Sharing of info by sector; STA seen as the go to organisation for up to date info
	<b>1.3.4</b> Commission new research if there are information/evidence gaps which would support potential new developments & funding bids.	<b>SIC</b> HIE ZetTrans, if transport related	2019	2019-23	Research identified/commissioned/used
	<b>1.3.5</b> Develop a system for collecting very local information e.g. visiting yacht numbers, use of caravan/campsites so we are better informed about these markets and can respond appropriately.	<b>SIC</b> Visit Scotland STA	2019	2019-23	Data collection system in place; data gathered and used to inform the sector

	<b>1.3.6</b> Partner agencies will proactively share information about new funding and other relevant opportunities	<b>SIC /HIE/Visit Scotland</b>	2018	2019-23	System in place for this; greater take up/response
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<b>Priority 2 EXPLOITING OPPORTUNITIES</b>					
Activity Area	Description	Partners (lead in bold)	Timescale		Progress Indicators & Targets
			Development	Delivery	
<b>2.1 Low Season</b>	<b>2.1.1</b> Consider the current niche markets which attract visitors and identify further “hooks” which could bring visitors to Shetland during the lean months. A current example is the popularity of the BBC crime drama, “Shetland” and could be further exploited.	SIC/HIE/ Visit Scotland/ STA	2019	2019-23	Strategic analysis completed
	<b>2.1.2</b> Assess the potential market for these “hooks” and how Shetland could respond by developing new products/packages to attract this market	SIC/HIE/ Visit Scotland/ STA	2020	2020-23	Market assessment completed; awareness of market requirements
	<b>2.1.3</b> Use Visit Scotland, “Year Ofs” (a biennial campaign) to encourage collaborative activities	Visit Scotland	2018-19 for Year of Coasts and Water in 2020	2020-23	Shetland prominent in Year Of activities New collaborations between tourism operators
	<b>2.1.4</b> Encourage applications to the Visit Scotland Growth Fund	Visit Scotland	2019	annually 2019 - 23	At least 2 successful growth fund applications
<b>2.2. Cruise Liners</b>	<b>2.2.1</b> Develop online information for cruise ship crew (targeted information about products/services available locally they need whilst in port)	SIC/NB Communi- cation (via Promote Shetland service)	2018	2019-23	Information available; evidence of use; business feedback

<b>Priority 2 EXPLOITING OPPORTUNITIES</b>					
Activity Area	Description	Partners (lead in bold)	Timescale		Progress Indicators & Targets
			Development	Delivery	
	<b>2.2.2</b> Develop online information aimed at independent cruise ship passengers. This will ensure they are well informed about opportunities/activities they can access whilst in port and help to cater for the significant number of cruise passengers who do not go on pre-booked excursions organised by cruise ship ground handlers. This could information about public transport, other sustainable travel.	SIC/NB Communi- cation (via Promote Shetland service)/ Visit Scotland ZetTrans	2018	2019-23	Cruise ship passengers dispersed over a greater number of sites/activities. New local business opportunities and benefits.
	<b>2.2.3</b> Inform the Shetland market about how the cruise ship industry works; how to get products to market; the scale/size of the opportunity; ensuring quality service; managing capacity.	SIC/Visit Scotland	2019	2019-23	Increased range and number of products for this market; local business benefits; quality experiences of Shetland for cruise ship passengers
	<b>2.2.4</b> Network with others such as Cruise Forth and Orkney in order to learn from and share good practice in this area.	SIC/Visit Scotland/ STA	Autumn 2018	2019-23	Improved understanding of the cruise ship industry and opportunities for Shetland
	<b>2.2.5</b> Better understand and minimise any future negative impacts of volume tourism on the Shetland environment and wider community	SIC	2018	2019-23	Early identification of potential negative impacts/risks and action to mitigate put in place.
<b>2.3 Festivals and Events</b>	<b>2.3.1</b> Create a database of information about Shetland's current festivals which includes dates, contacts, activities, marketing/promotion, venues, resources, challenges. Use this information, along with input from festival organisers, to identify any existing gaps in provision, collaborative opportunities, added value, marketing hooks. Develop an action plan to address the above, using expertise from Event Scotland as appropriate.	Visit Scotland	2019		More coordinated promotion Any gaps identified are addressed More collaborative activity around events Spin off opportunities for e.g. accommodation, transport etc services maximised Improved awareness by visitors of what's on offer and when Festival/event organisers can plan better/aware of what else on

<b>Priority 2 EXPLOITING OPPORTUNITIES</b>					
Activity Area	Description	Partners (lead in bold)	Timescale		Progress Indicators & Targets
			Development	Delivery	
<b>2.4 UNESCO Global Geopark</b>	<b>2.4.1</b> Develop a 5 year plan to ensure Shetland maintains its UNESCO status and derives the maximum benefit from that status. This will include working with local businesses and communities.	Shetland Amenity Trust	2018	2018-23	More local awareness of the UNESCO status; used to promote Shetland; increase business opportunities
<b>2.5 Other Niche</b>	<b>2.5.1</b> Work in this area will include further “drilling down” into these niche areas to ascertain what further potential there is, the size and scope of the market and how these can be exploited. Possible areas to explore are – Popularity of BBC crime drama, Shetland Internal flight tours A Shetland Food Trail A long distance path, i.e. International Appalachian Trail	Visit Scotland/ SIC/HIE STA	2019	2020-23	New ideas developed New markets identified New products/experiences developed
	<b>2.5.2</b> Shetland’s visitor attractions are cited as of a high quality and value for money (2017 Visitor Survey). Explore the potential to exploit these further; innovate practice.	Shetland Heritage Association/ SIC	2020	2021-23	New opportunities identified Increase in innovative practice

<b>Priority 3</b>					
<b>ENHANCING THE VISITOR EXPERIENCE</b>					
Activity Area	Description	Partners (lead in bold)	Time scale		Progress Indicators & Targets
			Development	Delivery	
<b>3.1 Digital Promotion and Information</b>	<b>3.1.1</b> Work collaboratively to develop a strong digital presence and campaigns to support the activities described in priority 2.	NB Communica tion (via Promote Shetland service)/ tourism sector	2019	2020-23	Increased awareness of new opportunities/activities Campaigns bring visitor to the new activities
	<b>3.1.2</b> Continuously improve online visitor information e.g. recent improvements to the ZetTrans app	NB Communica tion (via Promote Shetland service)/ tourism sector	2018	2019-23	Improved information and visitor feedback
<b>3.2 Continuously improving visitor experiences</b>	<b>3.2.1</b> Respond to the areas for improvement from the 2017 Visitor Survey, as appropriate.	SIC/HIE/Vis it Scotland/ STA	2018	2019-23	Improvements evidenced in next Visitor survey
<b>3.3 A responsive and outward looking sector/digital business solutions</b>	<b>3.3.1</b> Ensure an appropriate range of support/training available through Digital Tourism Scotland and other providers	HIE	Autumn 2018	2019-23	Workshop programme in place and used; other support & training needed identified Good awareness of local support for digital skills development



Priority 3	ENHANCING THE VISITOR EXPERIENCE				
Activity Area	Description	Partners (lead in bold)	Time scale		Progress Indicators & Targets
			Development	Delivery	
	<b>3.3.2</b> Organise at least one annual event for tourism providers to raise awareness of current trends & new opportunities	STA	2018	2019-23	Good attendance; strong industry engagement
	<b>3.3.3</b> Identify any additional skills development requirements and how these can be supported e.g. via occasional seminars, information bulletins	STA	2019	2019-23	STA understands industry needs and puts appropriate responses in place
	<b>3.3.4</b> Explore the potential to highlight careers in the tourism sector to young people e.g. through the Developing Young Workforce Initiative	STA	2019	2019-23	Increased awareness by young people in Shetland of careers in the tourism sector
	<b>3.3.5</b> Network and collaborate with other appropriate organisations outside of Shetland in order to share good practice and exploit opportunities.	STA	2019	2019-23	Good practice recognised and shared

#### NOTES:

1. Lead Partner – the role of the lead partner is to facilitate other partners to come together and agree/work on the action point; report back on progress via the STA. It is recognised that the majority of actions will require input from a number of partners to succeed.
2. In 2015, following industry engagement with 126 tourism organisations, it was agreed these 7 key messages should be articulated by the tourism industry in all discussions pertaining to transport. The 7 key messages are –
  1. Work to reduce transport costs for visitors without detracting from current resident discounts: the relative cost of getting to Shetland by air and sea is very high in comparison to other visitor destinations.
  2. Better match supply with demand for NorthLink cabins, car spaces, tour bus space, and budget sleeping accommodation (couchettes) particularly during peak times - North Boats contract - must capture unmet demand for advance bookings e.g. car and cabin on the same boat, otherwise statistics will not highlight capacity issues.
  3. Increase the frequency and reliability of external flights at busy times.

4. Improve links to Scandinavia by air and sea.
  5. Maintain and review internal transport costs to levels which do not deter visitors from travelling to rural and island locations
  6. Match supply with demand for greater frequency and capacity at peak times
  7. Improve the clarity of visitor information and increase access to visitor information on transport services in Shetland
- 3. This action plan is a working document and will be regularly updated**



