

Shetland Tourism Strategy Refresh 2024-26



Produced by Shetland Tourism Strategy Group 2023

Visit Scotland, Shetland Islands Council, Shetland Tourism Association,
Highland and Islands Enterprise, Lerwick Port Authority, Promote
Shetland, Shetland Arts, Shetland Amenity Trust

Introduction

The Shetland Tourism Strategy Group’s role is to drive forward the goals and priorities within the strategy and to review progress. In 2023, the group agreed it was an appropriate time to review progress in relation to the 2018-23 action plan, recognising the impact, in particular, of covid-19 and the need to ensure the strategy was current and reflective of the industry challenges and opportunities.

The process began in June 2023 by recording progress with the action plan. This is detailed in Appendix 1. A review of the SWOT analysis followed with some updates made.

From the SWOT analysis the group then went on to identify revised priorities and actions to address these. It was agreed that the current strategic aims are still current and relevant, although we have added in the purpose of “whilst generating prosperity for our island community” to our overall vision of, ***“We will work together to help make Shetland a year-round, sustainable tourism destination offering unique and outstanding visitor experiences, whilst generating prosperity for our island community.”***

The key themes have changed from “Leadership and Collaboration” to “Partnership and Collaboration” and from “Exploiting Opportunities” to “Sustainable Development of Current and Future Opportunities”. “Enhancing the Visitor” Experience has remained the same.

Partnership and Collaboration

Sustainable development of current and future opportunities

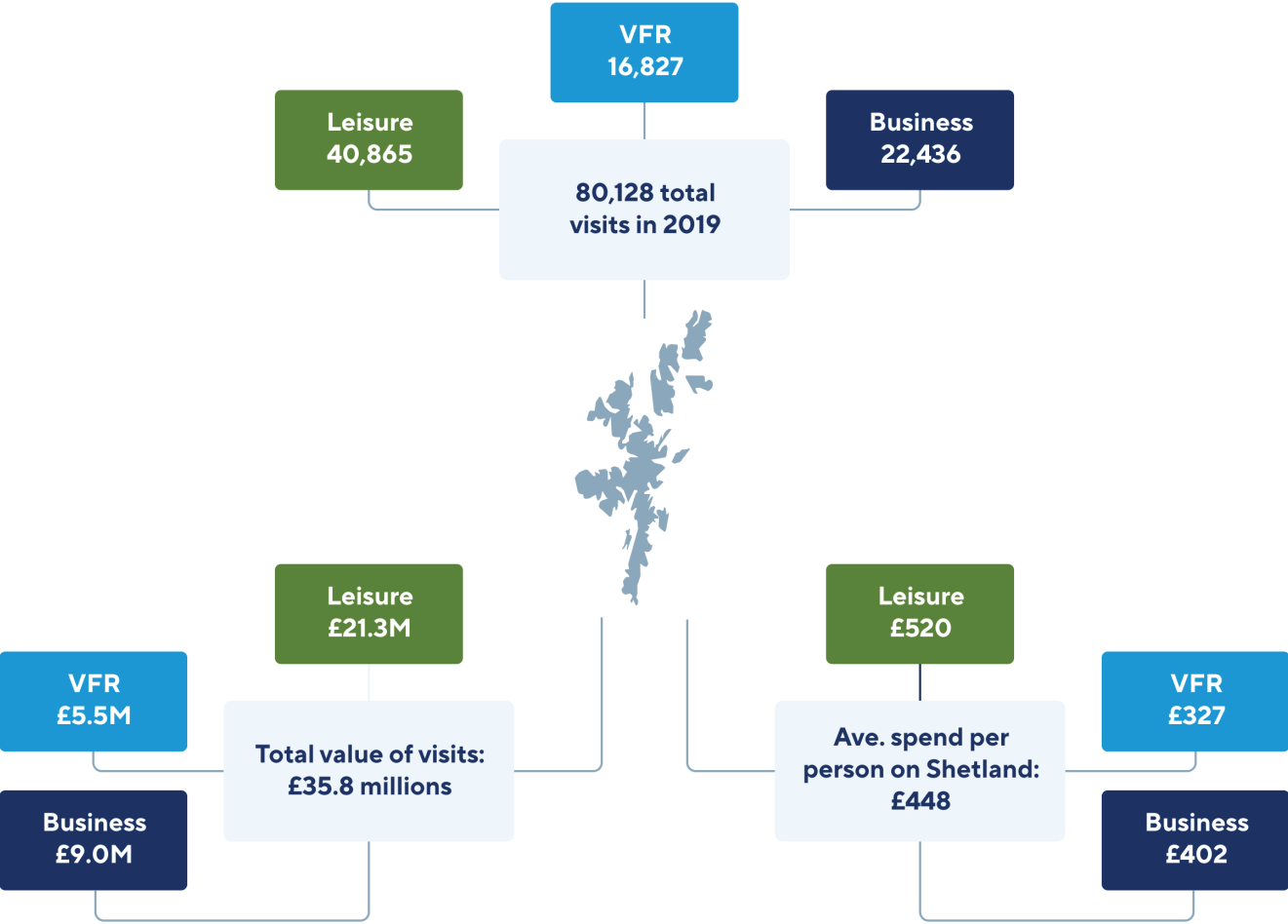
Enhacing the Visitor Experience

Targets

The 2018-23 strategy set its ambition as -

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

The results of the 2019 Visitor Survey (published 2020) demonstrated this had been exceeded, reporting the total value of visits as £35.8 million.



Purpose of the Refreshed Strategy

The purpose of this refresh is to ensure priorities and actions are current and relevant. During 6 months of 2024 a visitor survey will be undertaken, with the results expected in February 2025. The findings of this survey can then inform the development of a new strategy from 2026 onwards.

Shetland Tourism Strategy Refresh

SWOT

Tourism Partnership members revisited the SWOT analysis, resulting in the following:

Strengths

1. Unique heritage, culture, language, landscape, wildlife, environment.
2. Good strategic location for cruise ship calls.
3. Warmth of welcome
4. Strong offering in arts and crafts, traditional music other cultural industries.
5. Increased awareness through TV and literature.
6. Strong brand and destination marketing.
7. Strong community involvement and volunteering.
8. Economy not reliant on tourism, allowing for more authentic visitor experiences.
9. High demand from business visitors for accommodation (economic development projects).
10. High quality community infrastructure such as heritage centres, arts, sports facilities, marinas.
11. Festivals and events, some world-renowned.
12. Pristine, natural environment.
13. UNESCO Global Geopark Status.
14. Strong off-season demand for events such as UHA, Wool Week.
15. Strong, well used digital platforms which engage and attract visitors.

Weaknesses

1. Transport capacity, especially external ferry.
2. High cost of travelling to and from Shetland.
3. Lack of staff, including reluctance of young people to join the industry.
4. Lack of accommodation.
5. Lack of eateries, especially in rural areas and limited use of local provenance.
6. Not a year-round destination.
7. Lack of strong industry leadership/no Chamber of Commerce.
8. Heavy reliance on volunteers to manage tourism assets and services.
9. Gaps in infrastructure, e.g. toilets.
10. Lack of private sector investment e.g., hotels.
11. Variable accommodation and service quality.
12. Lack of current data, including impact of cruise market.
13. Tours focussed on south and central mainland.
14. Limited public transport.
15. Poor connectivity in some areas can make use of digital applications difficult.

Opportunities

1. Collaboration.
2. Increase and diversify accommodation offering.
3. Encourage recruitment to the sector, especially of young people.
4. Exploit the growing popularity of camping, campervan, caravan and glamping holidays.
5. Development of more shoulder season activities.
6. Develop better understanding of the cruise market and opportunities arising.
7. Develop greener tour routes which use public transport and encourage walking, cycling.
8. Support the development of a long-distance walking route.
9. Capitalise on green tourism.
10. Take advantage of the growing trend for responsible, sustainable tourism by developing holidays which involve volunteering.
11. Encourage agritourism and food and drink-based experiences.
12. Develop opportunities associated with UNESCO accreditation including Geopark and Crucible of Iron Age Shetland.
13. Develop space tourism opportunities.
14. Potential for access routes and interpretation from Viking Wind Farm.
15. Maximise opportunities from annual, globally recognised festivals and events.
16. Exploit Visit Scotland "year of" and continue to work collaboratively with national campaigns.
17. Exploit business development opportunities.
18. Maximise funding opportunities.
19. Business visitor market from forthcoming developments.

Threats

1. Limited capacity on transport services especially in peak season months.
2. Cost of travel.
3. Perceived industrialisation of the landscape.
4. Impact of large-scale developments on transport and accommodation capacity.
5. Regulation, e.g., Short Term Let licensing legislation, cruise tax and Visitor Levy.
6. Negative impacts on local communities from increased visitor activity.
7. Improved digital connectivity not addressed.
8. Reduced public sector investment.
9. Demographics and shortage of new entrants to labour market; potential for job displacement resulting from business development.
10. Reliance on volunteers to provide many of our attractions and services.
11. High costs of doing business.

Strategic Framework

“We will work together to help make Shetland a year-round, sustainable tourism destination, offering unique and outstanding visitor experiences, whilst generating prosperity for our island community.”



Priorities (P1 – P10)

Partnership and Collaboration	Sustainable development of current and future opportunities	Enhancing the Visitor Experience
P1 Continue to use the influence of the tourism partnership to make the case for change in key issues such as transport capacity (internal and external).	P3 Continue to play to our strengths and current reasons visitors come to Shetland, working towards being a year-round destination by making more of out of season activities.	P8 Enhance and improve our visitor infrastructure, using Shetland's Tourism Infrastructure Development Plan as a tool to attract investment; ensuring a pipeline of "ready to go" projects in the investment areas, whilst maximising the use of our existing assets.
P2 Ensure we have current market information; understand our visitors; our constraints and opportunities.	P4 Respond to emerging opportunities by developing sustainable, greener, authentic experiences, products, and events, dispersed throughout Shetland and contributing to our island prosperity.	P9 Continue to improve our strong digital presence across all aspects of the visitor experience, using it to ensure visitors have access to high quality visitor information from the beginning to the end of their Shetland journey.
	P5 Develop opportunities from the growing cruise market whilst balancing the increased demand with the needs of other visitors and the local community.	P10 Encourage investment in visitor accommodation.
	P6 Recognise the role volunteers and communities play in our visitor economy, ensuring appropriate support is in place to sustain capacity.	
	P7 To align with Shetland's Climate Strategy and identify action for a sustainable tourism sector.	

Our Actions

REF	ACTION	LEAD PARTNER/S	TIMESCALE	RELATES TO
Action 1	Work in partnership to realise the priorities and actions within the strategy and action plan, encouraging leadership and collaboration across private, public, voluntary sectors to maximise opportunities and increase efficiency.	All strategy partners	Quarterly meetings	P1
Action 2	Undertake a Shetland Visitor Survey spring-autumn 2024 and publish results around spring 2025.	SIC Visit Scotland	Spring 2025	P2
Action 3	Undertake an economic impact assessment of the cruise sector.	SIC	2024-25	P2
Action 4	Progress the Shetland Way project to the next stage (route design, detailed cost of capital investment, marketing requirements, maintenance and ownership responsibilities, long term).	Visit Scotland HIE SIC SAT	2024-25	P4 P7
Action 5	Work with SIC Transport Service to identify active travel/green routes relevant to visitors and promote these.	SIC Transport Services	2024-25	P4 P7
Action 6	Encourage entrepreneurship and new/ existing product development by delivering at least 2 tourism industry events which raise awareness of opportunities within the sector and how these can be capitalised on. Suggested topics are the cruise sector and sustainable tourism. The audience for such events is the tourism sector, including sub sectors of food and drink, arts and crafts, agritourism, cruise.	SIC Economic Dev / Business Gateway HIE Promote Shetland Visit Scotland LPA STA	Autumn 2024 or Spring or autumn 2025	P3 P4 P5 P6 P7 P10
Action 7	Use the Shetland Tourism Infrastructure Plan (STIP) to drive forward infrastructure improvements as funding opportunities become available; ensure a pipeline of “ready to go” projects.	All strategy partners	Quarterly review each strategy meeting	P8

Our Actions

Action 8	Engage the tourism sector in climate action by – - Encouraging tourism organisations to take action to reduce their carbon footprint, to develop products and services which respond to demand for greener tourism. - Ensuing tourism strategy alignment with Shetland’s Climate Strategy (currently under development).	All strategy partners	2024-26	P7
Action 9	Ensure continuation of visitor information services throughout Shetland by – - Taking forward the recommendations for visitor information points detailed in the SCOTO report. - Planning and preparing for changes to the delivery of visitor information services in Lerwick.	SIC Visit Scotland STA	2024-25	P6

Appendices

Appendix 1 - SHETLAND TOURISM STRATEGY 2018-23 PROGRESS REPORT June 2020 – May 2023

The Shetland Tourism Strategy and Action Plan was developed and launched in October 2018. A tourism strategy partnership group is in place to review progress with the action plan and make any necessary revisions, in line with changing circumstances.

In June 2020 the first progress report of the strategy period summarised what had been achieved from the launch up to end of March 2020. The Covid-19 pandemic impacted greatly on the sector and also the work of the strategy group. Despite this, much has been achieved and is summarised in this report.

The main goal of the strategy is. *“Working together to help make Shetland a year-round, sustainable tourism destination offering unique and outstanding visitor experiences.”* Activities to support this are then grouped within three themes of **Leadership and Collaboration, Exploiting Opportunities and Enhancing the Visitor Experience**.

LEADERSHIP AND COLLABORATION – ACHIEVEMENTS

Goals here were focused on developing a strong industry led sector; encouraging collaboration within the sector, with other partner organisation and sharing intelligence more widely to inform and improve.

Shetland Tourism Association

Over the period of the strategy, HIE and SIC Economic Development have provided funding for a development officer post, extending this last year for a further year. Membership of the STA has increased and during the pandemic the DO role was particularly useful in ensuring Members were aware of any guidance/legislation they needed to follow, and any grants they may be eligible to apply for. Effective systems for information sharing are in place, amongst the STA membership and the wider partnership, enabling opportunities to be taken advantage of and good practice exchanged.

ZetTrans has voiced Shetland concerns and aspirations regarding transport capacity to Transport Scotland/the Scottish Government on all possible occasions.

Scottish Islands Passport has been delivered and is operational - <https://islands.scot/our-islands/>

Year of Stories

Numerous organisations participated in the “Year of Stories”, delivering a range of activities. In 2022 Shetland Museum and Archives created a [dedicated web page](#) in celebration of the Themed Year, as well as hosting a series of events as part of the Year of Stories. Activities included workshops, a storytelling competition, an exhibition and series of films, with community stories at the heart of these.

Visit Scotland Growth Fund

Discussions were held to encourage applications to the Visit Scotland Growth Fund but unfortunately, no applications were forthcoming prior to the suspension of the fund.

Investment

Partner agencies have supported project proposals, ensuring a strong pipeline of new developments and the opportunity to leverage funding from out with Shetland.

Key community projects supported by SIC Economic Development and HIE include:

- Rebuild of Fair Isle Bird Observatory;
- Cullivoe Industrial Estate and Marina;
- Scalloway Caravan and Recreational Facility;
- Scalloway Waterfront Feasibility Study;
- Papa Stour Kirk redevelopment;
- Hymhus – Bigton Kirk redevelopment;
- Fetlar Caravan Site;
- Wild Skies Shetland;
- Sumburgh Head Sea Viewing Facilities;
- Old Scatness Conservation and Access;
- Improvements at Hoswick Visitor Centre.

Investment has come from SIC Economic Development Grant Scheme, HIE, Coastal Communities Fund, funds external to Shetland such as Rural Tourism Infrastructure Fund, Islands Programme, Community Led Local Development, Regeneration Capital Grant Fund.

Coastal Communities Fund, provided support to various groups across Shetland to improve and upgrade community facilities, including halls, community centres, marinas and social clubs.

Both SIC and HIE have provided annual financial support to Shetland Food and Drink to progress their strategic plan for 2021-2023.

VisitScotland has funded a Shetland Tourism Infrastructure Development Plan which contains a pipeline of new projects and will help inform future priorities for RTIF investment. Key projects supported by RTIF funding over this period are:

- Hoswick Café and Visitor Centre – new car park and interpretation,
- Hermaness Boardwalk, interpretive Centre and toilets,
- Scalloway Caravan Park.

Internal Transport

New bus contracts were implemented in 2020 and developing the business case for the next round of contracts to commence in 2025 is underway. Policy work is underway to support the recovery post-covid.

Sector Research

SIC and VisitScotland commissioned, delivered, and publicised the completed Shetland Visitor Survey 2019, the results of which demonstrated that there was significant growth in visitor numbers and spend since the 2017 survey.

- **The total number of visitors had grown from 73,262 in 2017 to 80,128 in 2019**
- **The value to the Shetland economy of the sector had increased to £35.8 million from £23.2 million in 2017.**

Visit Scotland continues to commission industry research through its Insights team and is undertaking a national visitor survey in 2023.

SIC has recently commissioned research into community tourism via SCOTO. SIC Economic Development has commissioned a study into the potential value to the local economy of tourism related to the space industry.

Active travel audits and cycling feasibility studies were commissioned by SIC Transport. These will help identify future opportunities.

Collaboration

Shetland Amenity Trust has established a new Shetland UNESCO Global Geopark Partner Working group, with positive progress towards partnership delivery, including collaboration with Promote Shetland and SIC on the development of a new Geopark logo and early discussions on a Geopark website.

SADA actively works with Visit Scotland and provides, where possible platform content for Promote Shetland.

VisitScotland - collaborative working has assisted in major event funding such as Shetland Tall Ships 2023 and identified opportunities such as the plan to run the Taste of Shetland Festival and Shetland Craft Fair under the joint brand of ShetlandMade. Close co-operation with Promote Shetland on an ongoing basis, e.g., journalists, film crews and influencers are supported by both organisations to visit Shetland on a regular basis.

Shetland Tourism Association and Food and Drink Group have started discussions about the potential for future collaborations.

EXPLOITING OPPORTUNITIES

Initial opportunities identified included low season, cruise liners, events, and festivals, Geopark and other niches such as textiles, wildlife, and Viking heritage. There was recognition amongst strategy partners that we could make more of these by working proactively together to pursue opportunities.

Cruise

A dedicated microsite was launched in 2019, and is available at: <https://www.shetland.org/cruise/>

The <https://www.shetland.org/cruise/> microsite focuses primarily on informing independent travelers about what they can do while in Shetland. It also features an 'activity finder' to allow people to find trips and tours that they might wish to go on, with options to contact the provider to discuss and book.

Networking with other cruise ports was done in person before the pandemic, at conferences and similar. There has been less activity on this front recently, but there is potential to resume attendance at relevant events.

VisitScotland/HIE/SE/ScotGov commissioned a national cruise survey in 2019.

<https://www.visitscotland.org/research-insights/about-our-industry/cruise-tourism-insights>

The cruise industry has bounced back with vigor from the impact of covid. There were 100 ships and over 100k passengers in Shetland in 2023, exceeding pre-covid levels.

Niche opportunities

Shoulder Season – Film-makers – Tall Ships – Space – Festivals

SIC Economic Development continues to support Shetland's network of visitor attractions to open during the shoulder season.

Promote Shetland secured over £100k of funding from VisitScotland's, "Destination and Marketing Fund" in 2021/22. Funds were used on their campaign "Find Your True North" promoting winter and spring tourism. There were multiple journalist/influencer trips, including for UHA and Wild Skies.

Engagement, including information and advice, with filmmakers and producers with an interest in filming in Shetland takes place regularly through SIC Economic Development.

SIC, in partnership with Shetland Tall Ships Ltd (STSL), completed agreements with Sail Training International for Shetland to enter into a Host Port Contract for the Tall Ships' Races 2023, and provided funding (£1.238m) for STSL to deliver the event on behalf of the Council. EventScotland (a division of VisitScotland) are major funders of the Tall Ships event with £130k committed.

SADA, in 2022, launched Sights and Sounds of Shetland Film Screenings building on live shows initially developed for the cruise market. These were edited and relaunched in 2023. Post Covid, SADA relaunched its festival programme and in 2023 Noir is attracting a proportion of sales from out with Shetland.

Shetland Wool Week was successfully taken online during the pandemic with support from HIE and EventScotland. A scaled back physical event took place in 2022. Work is now underway to re-establish the physical event in full.

SAT has supported the development of the Shetland Maritime Heritage Society to use the Vaila Mae and will support any future events through this group. The annual Nature Festival has been adapted to provide a range of nature-based events and activities throughout the summer months rather than in a single week.

Shetland Tourism Association and VisitScotland are in discussions with SFAD and SAAC re bookending a week with the Shetland Food Festival and Shetland Craft Fair, allowing for events in between.

VisitScotland chair the Promotion and Tourism Group for Saxavord Spaceport.

Festival listing – a basic database was created and used for listing in Shetland Visitor. Plan was interrupted by pandemic and will need reassessing post-covid.

The Shetland series continues to attract visitors. Good PR was generated around the creation and unveiling of a “Shetland Star” for Douglas Henshall although it was later moved (to be reinstated near the Sheriffs Court).

Global Geopark

Geopark is now embedded within the wider work of the SAT. SAT worked with partners to help develop the VisitScotland UNESCO Trail, supported Hoswick Visitor Centre to produce new geology displays. SAT has reconnected with the Geoparks network internationally, a new ‘Trail’ will shortly be launched, the partner working group has been re-established, a new logo produced and a new website is under development. A revalidation visit took place in June, with the final outcome of this expected soon.

Visitor Attractions

Shetland Museum and Archive was one of the first visitor attractions in the UK to reopen post pandemic with innovative solutions in place to adapt to pandemic requirements, Sumburgh Head also reopened promptly with adaptive measures in place. These learnings were shared with community museums who SAT continue to support with expert advice and financial support through heritage grants.

HIE has delivered community tourism workshops, aimed at raising awareness of opportunities and encouraging enterprise.

With funding from HIE, VisitScotland commissioned and delivered the Shetland Way feasibility study, aimed at creating a long-distance route and promoting walking/cycling throughout many areas and at all times of the year.

VisitScotland worked with Airtask to develop plans for scenic air tours of the islands. These were interrupted by covid before they started but plans to introduce the service in summer 2023.

Shetland Food Trail still under discussion with SF&D – will be on the agenda for 2023-26 once funding for project workers for this period is approved.

ENHANCING VISITOR EXPERIENCE

The role of digital promotion and increasing use of technology in the delivery of visitor services was recognised in the strategy as increasingly important as was the continuous need to keep improving visitor experiences.

Digital Promotion and Information

SIC Econ Dev tendered and awarded the contract for Promote Shetland for the period 2022-2027 (won by NB Communications). As part of this, the shetland.org site was completely redesigned and redeveloped in 2020 and has been refined and enhanced on an ongoing basis since.

Promote Shetland has undertaken a range of campaigns aimed at attracting more visitors to Shetland in the traditionally quieter times of the year. The extensive, multi-channel 'Find Your True North' campaign (supported by Visit Scotland funding) focused specifically on winter tourism. They've since created dedicated content relating to spring and autumn tourism. The seasonal campaign pages are available from <https://www.shetland.org/visit/seasons>

SAT created Virtual Shetland Wool Week in response to the Global Pandemic and brought the annual event online to an audience of over 40,000 people all over the world. 75% of participants in the virtual event were first timers to Shetland Wool Week and many are now keen to visit Shetland for the event or to explore Shetland more generally.

During the Global Pandemic SAT was proactive in sharing Shetland's Natural and Cultural heritage online and has seen significant growth in their online audience both locally, nationally, and internationally, promoting Shetland to a wider audience.

Digital Skills

In 2022 Business Gateway initiated a project aimed at conducting digital audits for businesses in Shetland. The primary goal of these audits is to facilitate the enhancement of business performance, optimise efficiency, boost sales, and capitalise on growth opportunities. Initially focusing on the Tourism and Food and Drink sectors, a total of 121 audits have been carried out to date.

A series of 6 digital tourism training workshops were delivered via HIE to raise awareness of new trends and build skills in this area. Over 30 participants took part.

Continuously Improving Visitor Experiences

SAT, in collaboration with Historic Environment Scotland, are delivering 'Exceeding Visitor Expectations Training' to front of house staff.

Shetland's first **tourism sector conference** was held in November 2022. It was hailed as a great success, with plans for it to become an annual event.

OTHER

Over the period April 2020-March 2023, SIC Economic Development has:

- Supported the sector through distribution of COVID-19 revenue support grants (£16m distributed in Shetland via SIC). This includes specific tourism sector grants including the Bed & Breakfast Fund and Large Self Catering Funding. This also includes discretionary funding provided by the Council to support the hotel sector, small accommodation providers, local retailers, events and festivals and taxi/private hire drivers;
- Supported businesses to adapt their processes through the Business Transition Fund;
- Supported the reapproval of the Lerwick Business Improvement District for the period 2022-2027, including the provision of support funding to Living Lerwick Ltd;
- Provided support to Living Lerwick via Scotland Towns Partnership for local resilience and campaigns;
- Continued to provide finance to Shetland Amenity Trust for the Shetland Museum and Archives contract;
- Provided support to Shetland Arts Development Agency for the Visual Arts and Crafts Makers Awards scheme;
- Sponsored the Royal Highland Show Presidential Initiative in 2022 and supported the attendance of Shetland Food & Drink at the RHS;
- In partnership with HIE, launched the Business Start Up Grant in 2022.

HIE - During 2018 to end of March 2023, HIE has approved funding of £3.772M funding towards tourism sector projects. This is inclusive of £1.3M Scottish Government funds for the new Fair Isle Bird Observatory. Like SIC, HIE was involved in administering in a number of COVID-19 related schemes and support to the sector. HIE ran a "Communities Leading in Tourism" programme, and three Shetland organisations took part.

Visit Scotland - throughout the COVID-19 pandemic, VisitScotland has worked with the Scottish Government to deliver financial support for Scotland's tourism and events industry. This resulted in 14 different funds being launched and managed between 2021 and early 2022.

VS has created Scotland's UNESCO Trail, the first country in the world to bring together 13 UNESCO sites into one trail, which features Geopark Shetland.

VS continues to promote Shetland as part of national and international campaigns. The latest VS campaign to feature Shetland, in partnership with Highlife Highlands and The Highland Council, is The Spirit of the Highlands and Islands (2022-23), which supports lesser-known areas of Shetland and niche tourism such as textile.

In 2023 VisitScotland have supported journalists from The Financial Times and The Metro to visit Shetland to experience Lerwick Up Helly Aa and influencer ScotlandMagic (Gabby Secombe Flagg) to report on SMUHA, plus a journalist from The Scottish Field and The Daily Telegraph is due in May.

Eight international tour operators were brought to Shetland to sample accommodation and experiences in April 2023 prior to Scotland Connect, the main international trade show where Shetland were represented by Promote Shetland.

NEXT STEPS/FUTURE STRATEGY

The Shetland Tourism Strategy Group has now reported back on progress with the action plan from 2018-23.

The intention is to undertake a visitor survey during 2024 and this will provide valuable data and evidence on which to develop a new 5-year strategy and action plan, running from 2026-31.

An interim refresh of the strategy and action plan will take place over summer - autumn 2023, enabling a current document and framework for action which can be used to drive forward key priorities until the new strategy is developed and agreed.

Transport

Opportunities

- Cheap transport access to outer isles
- Could have a strong industry voice at government/ policy level
- Could develop a comprehensive travel app
- Jump on jump off tour buses
- Good parking at terminals (Northlink & airport)
- Fixed links for islands
- Dial-a-ride type bookings only services for remote areas
- Car share schemes
- Improving accessibility e.g. by using a heritage bus at Sumburgh Head
- Buses have toilets but currently there is no facility to empty them
- Joined up walking routes – Viking Energy roads could help to facilitate

Challenges

- No shared cabins on Northlink
- Pods on Northlink not fit for purpose
- Too much demand and not enough capacity
- Lack of competition for external transport operators (Northlink & Loganair)
- Managing expectations of visitors around availability and frequency of public transport
- Local bus feeder services information difficult to understand
- Lack of contingency planning by Loganair for when there is disruption.
- Lack of confidence in travel arrangements leads to double booking which skews capacity
- Internal ferries becoming unbookable during disruption
- Staffing e.g on inter-island ferries & buses
- Funding to pay for development
- Transport capacity puts a cap on economic growth
- Lack of electric vehicle charging points

The Role of the STA

Opportunities

- To promote careers in tourism & hospitality to schools & at career events
- Networking
- Promoting member businesses to each other
- Provide workshops, training & CPD
- Advice & signposting from DO & other member businesses
- To lobby for island appropriate policies
- Acting as the voice of involved members
- Marketing businesses
- To attract passionate qualified people
- Growing membership
- Could re-establish strategy group to oversee Promote Shetland

Challenges

- Funding for DO
- Purpose of the STA unclear
- Unclear how the STA sits within the current DMO model
- Collaboration between sectors
- Confusion with multiple organisations over who does what
- Challenging to keep the STA & its work visible
- Without the STA businesses don't have a seat at the table to influence strategy & policy
- Recruiting committee members
- Having enough committee members to have a credible and powerful voice
- Current business model is not self-sustaining
- Volunteer fatigue – many in industry already have multiple roles

Voluntary Sector

Opportunities

- New generation of people to encourage to get involved
- Volunteering is a way to re-engage older or isolated people
- Volunteering can maximise people's skills & cultural exchanges
- More use of village halls & community assets
- More joined up thinking between facilities
- A central point of coordination for the voluntary sector
- A central organisation with role to organise the voluntary effort Shetland-wide
- Clarification of route for the voluntary sector to be able to understand and be supported to volunteer properly & effectively
- Sharing of best practice from volunteers who are in the Shetland tourism industry
- STA could pull together a 'kit' for volunteering & any training around customer service for volunteers
- Involving visitors in volunteering, e.g peatland restoration, mending paths, planting trees
- A 'volunteer bank' to link organisations to volunteers and a clearer route on how to get involved
- Utilising students who have free time during the summer months

Challenges

- Volunteer fatigue
- Lack of available time
- Volunteering isn't free, it incurs expenses
- Always the same people volunteering, leading to a fatigued volunteer pool
- Costs of running facilities, more need to commercialise
- Smaller museums losing focus as having to cater to tourists
- Lost a generation of volunteers through covid, which are not coming back
- Lack of interest from young people
- Volunteer effort has shifted to more 'essential' activities such as shops
- Lots of red tape around volunteering e.g child safety etc
- So many volunteers in Shetland already doing other things e.g. volunteering in sports, coaching, clubs so have no time left
- Heavy reliance on volunteers means some places would be unable to run without them
- Realising the value of existing volunteers knowledge often happens too late
- Restricted opening hours of attractions due to volunteer availability
- Generally, museums in particular rely on older volunteers as they have more time available

- Seasonality of volunteers availability e.g. people often busier with other things in summer months
- Lack of a co-ordinated place for people to find out what opportunities are available in volunteering
- Volunteers running toilets which they feel should be done by the public sector/LPA
- Volunteers struggling to cope with large scale visits
- Volunteers not at the table in decision making around tourism

Cruise

Opportunities

- Can encourage people to return to Shetland independently – sell the idea of coming back
- Can expand and offer new experiences
- Food tourism
- Pop-up food opportunities
- Spreading the information that cruise passengers do spend money
- Increasing passenger numbers
- Opens up Shetland for visitors who can't get here via other transport and/or can't get accommodation
- Stalls on the pier e.g crafts, food
- Utilising small ports
- Utilising Scalloway harbour
- Acting as an ambassador representing Shetland
- A pick-up point for boat tour operators
- Cruise visitors staying overnight with events laid on for them
- Private tour guides can capitalise
- Great opportunity for dispersing visitors to other parts of Shetland – can lessen pressure points & spread benefit to more areas
- Diversification opportunity for businesses
- Independent cruisers – can be marketed to prior to their arrival

Challenges

- Transport shortages and the challenges it creates
- Limits placed by ships on number of private tours available on pier (generally 4 or 5)
- Lack of understanding of the value cruise visitors bring
- Late cancellations

- Time constraints on visitors experiences
- The need for an articulated shared community strategy
- Ships doing their own promotions of Shetland
- Crowding and overtourism
- Toilets in particular at key attractions
- Lack of engagement between cruise liners and community
- Large numbers of visitors arriving at often small attractions at one time
- Lack of understanding of how to cruise market can be accessed
- Communication on timings for shoreside businesses to prepare
- Days with multiple calls
- Large cycle tours
- Lack of opportunities to arrange tours for independents

Climate Change

Opportunities

- Our cooler climate
- Sailing as a means of green travel
- Utilising local food & produce
- Fixed links – long term
- Croft holidays – visitors paying to stay/ work
- Voar Redd up as an activity/ experience for visitors
- Tell the 'Carbon Story', i.e. it is a short-haul but 'foreign' experience highlighting peatland restoration etc
- Introduce minimum stays on island
- Reinforcing the local infrastructure
- Active travel, e-bike hire developing a fleet in Isles
- Active travel hubs, e.g. developing with local shops
- Voluntourism / an eco-tourism payback scheme
- Bike / walking tours where a kit carrying service is provided
- Scope to use by-laws – e.g. banning single use materials
- Locally produced goods e.g. soap, food
- Peatland Restoration
- Greener boat travel
- Bike station/ facility at Lerwick Pier

Challenges

- Big carbon footprint getting to Shetland
- Managing customer expectations while also facilitating change. E.g. during room changes, less changing towels
- Supply of local produce & the cost of production
- Having the labour, skills & supply chain to facilitate change
- Recycling – lots of waste which can't currently be recycled and plastic is hard to avoid
- Benefits of green accreditation are unclear
- Educating visitors i.e. how to use heating efficiently
- Catering to a varied market of business & leisure guests

Infrastructure

Opportunities

- Cheap and reliable inter-island ferries
- Development of small harbours
- Public hall facilities
- Visual information and interpretation boards
- Campsites & caravan sites & their waste disposal and charging facilities
- Portaloo hire
- Development of better facilities for visitor pickups for tour operators
- Understanding other places transport issues

Challenges

- Lack of cycle paths/ lanes & this limits any potential cycling tour opportunities
- Current tours are all mostly vehicle based (private cars/vans)
- Toilet access & provision
- Public transport timetabling & interpretation
- Accessibility to Sumburgh Head
- Single track roads – visiting drivers not knowing how to use them
- Single track roads – cyclists can hold up traffic & can be a danger to themselves and drivers
- Lack of a user friendly travel app
- Land accessibility i.e. fencing, gates, stiles
- Lack of designated parking

- Electric vehicle hazards at campsites & caravan sites
- Lack of charging points for electric vehicles
- Pressures on landscape
- Loss of cafes
- Strain on capacity of local transport (ferries)

Recruitment

Opportunities

- STA Careers Fair
- Word of mouth & peer to peer
- Working with college and school
- Educating teachers on tourism careers
- Guaranteeing a real living wage
- Interview skills
- Flexible working hours and opportunities
- Can offer contracts to suit persons availability
- Industry offers digital and social media opportunities – this could be highlighted more
- Promoting how fun working in tourism is
- Can use technology to aid with recruitment
- Apprenticeships
- Seasonal working options, e.g. students

Challenges

- Poor retention of staff
- Lots of other sectors to compete with
- Lack of training opportunities
- Perception of the industry as zero-hour contracts and low paid
- Cost of employing staff
- Lack of 'people skills'
- Awareness of the variety of jobs in the industry
- Transport for staff
- Accommodation & housing for staff
- Lack of training opportunities

- Benefits system not encouraging people to work
- Ageing population
- Population decline
- Seasonality of work
- High cost of living in Shetland
- Lack of confidence to recruit digital services staff
- Age restrictions on employment
- Logistics of living on islands
- No capital to employ staff

Accommodation

Opportunities

- Campsite in Lerwick
- Could attract investment in to Shetland
- Could develop new property
- Good diversity of accommodation offering
- Funding from SIC/ Business Gateway/ HIE to help towards QA rating
- To have more accommodation in outer isles

Challenges

- Rising costs
- Staffing
- Changing demand i.e. less oil workers
- Keeping visitor numbers up in winter
- Pod share & no shared cabins
- Funding inequalities
- STL
- Lack of quality hotels
- Some areas severely lacking evening meal provision i.e South End, Outer Isles
- Accommodation for seasonal staff
- Croft diversification hampered by crofting regulations
- Conflict between long & short-term accommodation needs