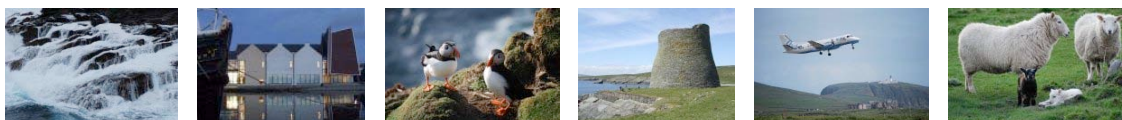




The Shetland Marketing Strategy

Promote Shetland

January 2011



The Shetland Marketing Strategy

Acknowledgement

This strategy has been developed in consultation with many in the community involved in business, local government, government agencies, non-governmental organisations and voluntary bodies. Before the strategy was drafted, more than 80 individuals in more than 70 organisations contributed their opinions and ideas. They were later invited to comment on the draft strategy, as was Ms Creenagh Lodge. All these contributions have been very valuable. Promote Shetland, Shetland Amenity Trust and Alastair Hamilton wish to acknowledge all of that help and advice.

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Other Supporting Material

Promote Shetland Strategy Development: survey responses by topic

Promote Shetland Strategy Development: survey responses by sector

These substantial documents contain the responses to a survey of more than seventy Shetland businesses and other organisations. They are available, in electronic form, on request.

Summary

1. Although this strategy has been developed for Promote Shetland, it is intended to guide the marketing of Shetland and its products by all those who have anything to do with making the islands' attributes better known.
2. Promote Shetland aims to project Shetland on the world stage as an authentic, creative and highly desirable place to visit, live, study or do business with.
3. Through engaging with other local partners and with every sector of the Shetland economy, Promote Shetland will encourage trade, talent, inward investment and tourism and try to ensure that Shetland's distinctive appeal receives the attention that it deserves.
4. Shetland has many strengths, including an outstanding natural environment, a rich cultural heritage, a larder offering superb food and an open, hospitable, tenacious, creative, clever and safe community enjoying excellent facilities. It also has the ability to surprise. These exceptional qualities have attracted wide admiration.
5. In the sense that it has a reputation and makes promises, Shetland - like most places – has a brand; indeed, it has had one for centuries. The task is to manage, improve and develop Shetland's brand. Previous work on the branding of Shetland, undertaken by Corporate Edge in 2003, provided an excellent analysis and a sound foundation for further work.
6. We must do justice to Shetland's strengths and keep our promises to our target customers, defined by earlier work on the branding of Shetland as 'successful idealists'. This depends on our actions in delivering excellent products and providing great experiences.
7. 'Successful idealists' are people who value values and like to buy things from places, the values of which they admire. They are affluent and are often older than average. There is abundant evidence that the approach of 'successful idealists' to purchasing, involving as it does concern with authenticity, origin, integrity and fine quality, has been steadily gathering support and is a major influence in the marketplace. Shetland's strengths are precisely those that appeal to 'successful idealists'.
8. International and national policies, both in general and in particular fields such as the conservation of cultural heritage, reflect an increasing desire to cherish those things that are distinctive. The natural and cultural heritage is a fundamental strength in Britain, Scotland and Shetland.

- 9. Local policies in Shetland reflect the same global trends and there is a clear commitment to protect, support and develop Shetland's rich heritage and environment, on which the islands' economy depends. There is also evidence of a desire to improve Shetland's economic performance through, for example, product development, the targeting of higher value markets and more efficient working practices.**
- 10. In the tourism sector, several studies have confirmed that Shetland is attracting more visitors and that there is scope to improve what is offered. Among many suggestions are upgrading of accommodation, more accommodation geared to specific markets, more engagement with 'quality' schemes and more use of local produce.**
- 11. Tourism is not Shetland's largest industry, but tourism promotion and the experience of visitors together provide a legitimate vehicle for communicating the essence of Shetland and the breadth of its appeal. However, these promotional efforts need to be co-ordinated with all of the other factors that influence progress, including our people, leaders and ambassadors; business, industry, products and services; arts, sport, culture and heritage; local government policies and actions; and the work done in promoting trade and inward investment.**
- 12. If Shetland's promotional activity is to achieve its potential, a number of key challenges must be faced. These include: delivering the promise of quality; understanding and defining our customers; product development; transport and distribution; stabilising and increasing population; and making the most of the resources that Promote Shetland can offer.**
- 13. Our objectives are intended to be specific, measurable and realistic, with target dates for their achievement, making them easy to monitor through completion of tasks included in the Action Plan. They are as follows:**

 - i. Galvanise public authority, NGO, private and educational stakeholders around a common vision to deliver and market high quality Shetland products and services;**
 - ii. Inspire the wider community to support and play its part in helping to deliver the common vision;**
 - iii. Encourage and support the development and delivery of consistently high quality Shetland products, services and experiences;**
 - iv. Keep in touch with and better understand our existing and potential customers;**
 - v. Develop and deliver innovative place-making initiatives that enhance the recognition and reputation of Shetland's name and give priority to tourism, energy, food & drink, technology and textiles sectors over the next 3 years;**

- vi. Identify and work with passionate people, in and outwith Shetland, to champion Shetland and act as ambassadors to encourage trade, talent, inward investment and tourism;**
- vii. Position and promote Shetland as the geographical, cultural and technological hub between the UK and Scandinavia with a view to encouraging cross-border initiatives which are mutually beneficial for the North Atlantic community; and**
- viii. Focus and optimise resources to ensure effective co-ordination and judicious targeting of priorities and to avoid duplication of effort.**

1. The purpose of this strategy

Although this Strategy has been developed for Promote Shetland, it is intended to guide the marketing of Shetland and its products by all those who have anything to do with making the islands' attributes better known.

2. The aim of Promote Shetland

Promote Shetland aims to project Shetland on the world stage as an authentic, creative and highly desirable place to visit, live, study and do business with.

3. How can the strategy help?

The strategy provides a foundation for marketing almost every kind of product or service that Shetland offers. However, it's especially relevant for two kinds of business, namely those serving customers outside the islands and those for which Shetland's name is a vital asset. The strategy

- sets out Shetland's strengths and explains how they are reflected in the islands' brand
- identifies the customers who may be most interested in what Shetland offers
- suggests how we can connect more successfully with them
- sets out aims for the marketing and branding of Shetland
- provides a framework to guide the work of public and private sectors

The strategy isn't aimed at the oil industry, which operates in a very specialised commercial environment.

4. Who's involved?

The short answer is that everyone in Shetland has some part to play, including those who aren't involved in business. For example, as customers, we can all suggest ways of improving products or services.

Businesses are, of course, vital to progress. By responding to and anticipating customer needs, they can compete more successfully in the national and global marketplace. By supporting and reinforcing the values inherent in the Shetland brand, they can improve the islands' reputation in ways that are helpful to everyone.

Some public agencies have specific roles in securing the best possible economic future for Shetland. Shetland Islands Council contributes in a variety of ways, not only through its economic development function. The three major local trusts undertake projects, or underpin services, that greatly enhance the islands' prospects. HIE provides support for a range of businesses with potential for growth. VisitScotland is the national tourism agency and it promotes Shetland to visitors and provides visitor services. Promote Shetland, operated on behalf of the Council by Shetland Amenity Trust, focuses on making potential customers aware of best that Shetland has to offer.

5. Shetland's unique approach

Promote Shetland represents a fresh and exciting new start in the marketing of Shetland. In creating it, Shetland Islands Council has taken an innovative route to marketing what the islands have to offer. Recognising the need for a powerful vehicle to undertake these tasks, the Council awarded the contract for Promote Shetland to the Shetland Amenity Trust, which has a strong track record in the provision of high quality visitor information, products and services.

The result is an organisation that combines marketing and promotional expertise with long experience in bringing out the best in Shetland's heritage. Working with other local partners, Promote Shetland is well placed to encourage trade, talent and inward investment. The people in Promote Shetland's small team are dynamic and highly motivated, sharing a passion for the islands and bringing a unique but complementary range of skills and expertise. They will try to ensure that Shetland's distinctive appeal receives the attention that it deserves.

It's important to emphasise that:

- Promote Shetland is concerned as much with promoting Shetland's food, knitwear or filming opportunities (to take just three examples) as it is with tourism.
- The job of promoting Shetland is one for everyone, not just the staff of Promote Shetland, and needs to be tackled in a co-ordinated way.

6. Shetland's strengths

Shetland has many strengths. Some are well-known, some less so. They include:

- An outstanding natural environment with

- An astonishingly diverse geology;
 - A remarkable range of landscapes, from verdant meadows to rugged seascapes;
 - A colourful botanical palette that includes wild flowers unique to the islands;
 - Exceptional wildlife, including birds, seals, otters and whales;
 - The world-famous, strong and hardy Shetland pony and collie; and
 - Clean, fresh air and low levels of pollution of all kinds.
- A rich cultural heritage that features:
 - Impressive archaeological remains, including the most complete broch in existence;
 - An endlessly fascinating blend of Scandinavian and Scottish cultures;
 - A deep-rooted musical tradition that is very much alive;
 - A strong craft base, with distinctive, fine knitwear that is known the world over; boatbuilding; and workers in wood, leather, ceramics, stone and glass; and
 - A vibrant arts scene, with exciting work going on in a range of disciplines.

My visit to Shetland was extremely interesting and the quality of the food produced in the islands is tremendous. I was particularly impressed by the quality of the mussels that are grown in the clean waters around Shetland. These mussels are in my opinion the

- A larder offering
 - Unique lamb, recognised under the EC Protected Designation of Origin (PDO) scheme;
 - Wild fish caught in the rich fishing grounds around the islands;
 - Farmed fish, some with organic certification, grown in unpolluted waters; and
 - Shellfish and, in particular, succulent mussels of outstanding quality.



The Unst bus shelter.

- A place to live or visit characterised by
 - Openness, friendliness, good humour and hospitality;
 - Tenacity and determination;
 - Creativity and a cosmopolitan connectedness that belies Shetland's location;
 - Clever, visionary innovation and resourceful enterprise;
 - High standards in local services such as education, health and recreation, with a network of leisure centres, many community halls, an outstanding new museum and archives and, in 2011, *Mareel*;
 - Safety; and

- An astonishing range of leisure opportunities for a small community.

Shetland's ability to surprise is also a strength. The islands are home to an innovative hydrogen energy research establishment and a world-famous zero-carbon house. Alongside wonderful knitwear and seafood, there are ranges of soap, fudge and teddy-bears and the islands' musical talent extends beyond traditional fiddle into jazz, classical, rock and blues. The islands abound in local curiosities, such as the fully-furnished bus shelter and xylophone boat in Unst, the tablet advancing a strange theory of tides in Scalloway and the tombstone at Cross Kirk, Eshaness that records a nineteenth-century merchant's fatal mistake in selling nitre instead of Epsom Salts. The well-established network of qualified guides is also an asset, alerting visitors to these and other highlights.

Leaving that time was more difficult. I made sure I sat at the back of the plane so nobody could see me cry.

Novelist Ann Cleeves, describing her departure from Fair Isle after the launch there of her novel, *Blue Lightning*.

Shetland's strengths are widely recognised outside the islands. For example, the National Geographic Society recognised it as among the most unspoilt islands in the world; Shetland achieved third place (equal with the Lofoten and Chiloe islands). The Society concluded:

These islands have got everything 'with bells on': spectacular sea cliffs; pristine beaches; fascinating geology; over a million breeding seabirds; the highest density of otters in Europe; regular sightings of killer whales; and superb displays of rare sub-Arctic flora. A unique blend of Scotland and Nordic culture....Extremely high integrity in all aspects of heritage and ecology, despite oil developments. Great planning controls and attitude....There is great pride amongst locals in the islands and in the welcome they extend.¹

The Scotsman said:

Shetland is a treat to the senses. No other area in northern Europe of a similar size can boast of such a mélange of geographic, cultural and ecological wonder. Whilst it may be physically distanced from the mainland, its significance as a national treasure has never lost its potency².

¹ Tourtellot, Jonathan B, *Destinations Rated: Islands, National Geographic Traveller*, November/December 2007

² *The Scotsman*, Spring Travel Supplement, 28 March 2009

Simon King, presenter of television wildlife programmes, has fallen in love with Shetland. In the concluding passage of the book that accompanies his BBC television series, *Simon King's Shetland Diaries*, he writes:

Where once I visited Shetland, I now go back there.

The islands found their way into my bloodstream by reputation and now they are in my very bones through rich experience. They will remain unpredictable, capricious, beautiful and sometimes hostile. But Shetland will, I hope, always harbour a wealth of natural wonders that with time, consideration, sensitivity and care will offer themselves to a patient lover³.

More recently, Lonely Planet listed Shetland among the top ten regions in the world to visit in 2011. The guidebook publisher singled out the 'last untamed corner of the UK' for special praise, advising 'adventurous travellers to step this way'. Lonely Planet's Tom Hall said that it was 'no surprise' that they had selected 'a little-known but beautiful and rewarding corner of the UK as a must-see next year'.

In marketing and promoting Shetland and its products, we must do justice to the islands' extraordinary assets and ensure that we satisfy our most promising customers, the 'successful idealists', a category discussed further in section 6, below.

7. The Shetland Brand

In the sense that they have reputations and (deliberately or otherwise) make promises, most places already have brands. The name of Hjalmland would probably have been associated in Viking minds with good fishing, readily available soapstone and grim winter weather.

Changing the reputation or brand of a place doesn't happen overnight. The value of 'place branding' exercises is greatest if they encourage change in local behaviour, for customers will only be genuinely influenced to think differently about a place if their experience of it and its products (or the experience of people they trust) changes for the better. Real and lasting change comes, essentially, from the way people in a place change the way they manage their affairs, what they produce and the experience they offer customers, including visitors.

Thus, Shetland already has a brand and the challenge is to manage, improve and develop it. The islands have some immensely valuable assets; the name is connected, worldwide, with ponies and knitwear. The islands can claim an excellent reputation in some markets, for example among traditional music or wildlife

³ King, S., 2010, *Shetland Diaries: Otters, Orcas, Puffins and Wonderful People*, London

enthusiasts. However, a remarkable range of products and services is on offer, including excellent seafood, intriguing archaeology, specialist boats and innovative energy research.

In the end, a brand like Shetland's will be as much deduced as declared – if not more so. That is, customers will learn more from what they experience than what is officially expressed. This is desirable because what people deduce for themselves is far stronger than what is messaged 'at' them and this is particularly true of the target market of successful idealists. It is even more desirable if Shetland wants to pull off the ambition to achieve disproportionate impact, which can be summarised as thinking cleverly rather than spending money.
Corporate Edge (2003)

In 2002, Shetland Islands Council invited Corporate Edge, a firm with a strong track record in the development of brands, to evaluate Shetland's brand and make recommendations as to its future development. The Council had in mind the need to set the economy on a new path as oil revenues began to decline. Given that Shetland knitwear had become a generic description giving no guarantee of origin, there was also a sense in which Shetland needed to reclaim its brand. Other influences included the need to raise the value of Shetland products in view of the high costs of making products in the islands

and transporting them to market. That would involve offering higher quality and added value.

The Corporate Edge analysis⁴ was excellent. It set out the key components of the Shetland brand, as follows:

- **Vision:** a self-reliant and successful Shetland
- **Goal:** to achieve measurable export and tourism targets
- **Philosophy:** excellence as the inspiration for action, necessary to justify necessarily high prices
- **Positioning:** a small, clever, specialised country rather than a struggling, peripheral community
- **Focal customer:** successful idealists, with the focus on quality rather than quantity



Epitomising small but clever, Pure Energy in Unst advises clients world-wide.

⁴ It is attached as Appendix 3.

- **Proposition:** Shetland's offer is a rich, rare, quality experience

Corporate Edge sought to capture the essence of the Shetland brand, which they felt must reflect the character of both the place and the people. They reckoned that there were three elements to the spirit of Shetland, *soul*, *origins* and *fineness*. *Soul* reflects the character of the place and its culture; in Shetland's case, this includes the landscape, the people, and the vitality that's evident in, say, music. *Origins* is simply to do with the fact that Shetland's characteristic products are rooted in the islands, rather than being assembled from materials from elsewhere; knitwear and music reflect long tradition. *Fineness* has a double meaning; it's partly about values that Shetland people share, like trust and honesty, and it's partly about the quality of something like a one-ply lace shawl.

The approach developed by Corporate Edge was taken forward in the Outline Marketing Strategy for Shetland, prepared by the Economic Development Unit and published in January 2007; further reference to it is made below. Promote Shetland is fully committed to the approach proposed by Corporate Edge.

As part of the work they did, Corporate Edge developed proposals for 'visual branding', in other words a style and a logo, or 'device of origin'. These have been applied in the tourism sector; however, their use in the identification of other Shetland products or services has been limited by an undertaking given in 2005 related to European Union State Aids rules, following a complaint⁵. Promote Shetland and its partners will explore ways in which the use of the 'device of origin' might be extended in a manner compliant with State Aids rules, probably through the development of a pilot project relating to high-quality products in a specific sector.

It is important to emphasise, at this point, the value and critical importance of efficient quality assessment arrangements. It is not intended that such arrangements should be unnecessarily bureaucratic or introduce another layer of quality assurance where satisfactory assurance already exists. However, any quality assurance scheme will need to provides the reassurance that discriminating



Shetland's traditional culture strongly appeals to many seeking authentic experiences.

⁵ There is more information about the work that Corporate Edge did at <http://www.shetlandmarketing.org>.

customers demand, for example on issues such as origin or animal welfare. Schemes designed to satisfy a bulk market may or may not match up to those demands. Importantly, too, efforts to improve quality must precede, not follow, increased effort in promotion.

During 2010, a review of work done on branding to date led to the development of a Brand Implementation Strategy. Its aim is

To inspire the people of Shetland to proudly deliver the brand promise in all that they offer, so developing a unique profile which will help Shetland to compete effectively in global markets as a place to visit, invest in, buy from and live.

To achieve this, the brand strategy seeks to:

- 1 Build local understanding of Shetland's brand and its importance to the islands' future;
- 2 Build understanding amongst businesses of how and why to engage with the brand for maximum long term gain
- 3 Recognising that Shetland's products and services do not always meet or exceed customer expectations, work to close the gap between what is promised and what is delivered;
- 4 Establish mechanisms including shared strategies through which businesses, public agencies, the voluntary sector and individuals can work in partnership in support of the brand; and
- 5 Devise effective mechanisms for reviewing progress, measuring impact and identifying opportunities for improvement.



There's scope for Shetland to be much better represented where 'successful idealists' are concentrated. This example is in the west end of Glasgow, where many shops focus on that market, including the third Scottish branch of Waitrose.

Among other things, the brand implementation strategy will address the issue of training, inconsistency in which can lead to variable customer service.

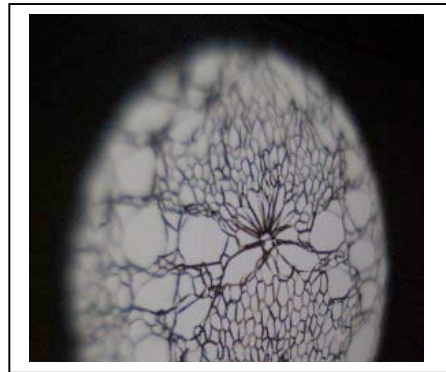
8. Shetland's customers and their preferences

To promote Shetland successfully, it's essential that all involved have a good understanding of Shetland's customers and, in particular, the 'successful idealists' on whom Corporate Edge recommended Shetland should focus. Corporate Edge described them as people who are:

‘...at the top end of international societies: older, affluent but putting a value on values and liking “rarity”. They prefer to visit a place which is not only different but also highly distinctive; and to buy produce and products from a culture whose values they admire’⁶.

‘Successful’ in this context means affluent, reflected in this group’s ability willingly to pay a premium for things that are authentic and of fine quality. Their idealism is seen in the way that they seek genuine experiences, crafts or food. They are inclined to avoid the artificial or pretentious and are very much concerned about the origin of what they buy, how it was produced and by whom. They are likely to be strongly interested in (for example) the heritage, local arts, crafts and traditions, animal welfare, environmental issues and the use of additives. If they’re buying Shetland lamb in London or ordering Shetland mussels in Paris, they’ll be keen to know the story of the product. Although the parallel isn’t exact, they’re likely to share many attitudes with the now widely-used category of ‘ethical consumers’.

When successful idealists choose to visit Shetland, they’ll want an honest, personal experience of the islands rather than invented ‘visitor attractions’. Eating out, they’ll be more impressed by well-cooked, nicely-presented local fish, lamb, beef or vegetables than by anything grandiose or imported. They don’t want gold-plated taps but they do want good, friendly, intelligent service.



Although the focus is on ‘successful’ idealists, in other words those who offer the best prospect of generating revenue through tourism and exports, it is vital to cater well for those idealists who are not ‘successful’ in a financial sense. Often younger, perhaps still in formal education, they also bring business to the islands and may be very effective ambassadors. Apart from that, they may arguably be the ‘successful idealists’ of the future.

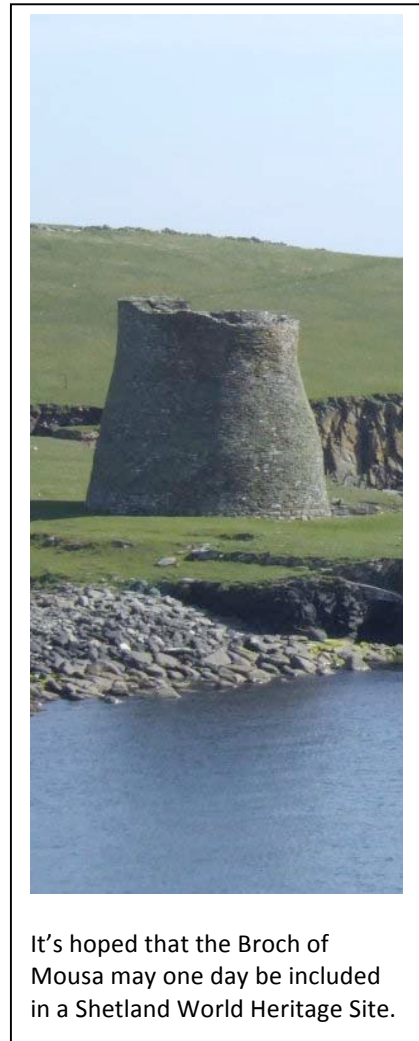
9. Trends in the marketplace

To what extent are the demands and preferences of ‘successful idealists’ mirrored in the marketplace and in public or commercial policy? In catering to their demands, whether in export markets or in welcoming visitors, is Shetland swimming with the tide or against it? How are Shetland’s most promising customers being affected by the recession?

⁶ Creenagh Lodge (2003), *Project Selkie: The recommended brand strategy for Shetland*, Corporate Edge, London, p. 3

There is abundant evidence that the approach of ‘successful idealists’ to purchasing, involving as it does concern with values – including authenticity, origin, integrity and fine quality – has been steadily gathering support and is a major influence in the marketplace. Often, this approach is expressed in offers by retailers that emphasise ethical sourcing and production and the pursuit of sustainability. For example:

- Among larger, national retailers, there is an increasing focus on the origin and ethical credentials of products. The Co-operative, long involved in the fair trade movement, has a long-term plan to convert all its operations to fair-trade⁷. Marks and Spencer has expanded its original 100 ‘Plan A’ sustainability commitments to 180 and aims to be the world’s most sustainable retailer by 2015⁸. Waitrose, which is particularly focused on provenance and on local and regional produce, has become Britain’s fastest-growing food retailer, recently announcing plans to increase the number of its outlets six-fold over the next five years⁹; 39 new stores are to open in 2011¹⁰.



- One recent report estimates that ‘expenditure on ethical goods and services has grown almost threefold in the past 10 years’¹¹. There have been dramatic increases in the demand for fair-trade products (up from £22m in 1999 to £635m in 2008) and organic products (up from £390m to £1,986m over the same period). In 2008, one in two consumers reported that they had chosen a product primarily for ethical reasons, up from 29% in 1999.
- IGD, a research organisation specialising in the retail sector, reports that recent research in four main European grocery markets (Great Britain, France, Germany and Spain) found that at least 30% of people mention

⁷ See <http://www.co-operative.coop/food/ethics/Ethical-trading/Ethical-policy/>

⁸ See <http://plana.marksandspencer.com/media/pdf/planA-2010.pdf>

⁹ *Waitrose plans sixfold increase in food stores*, Daily Telegraph, 17 July 2010

¹⁰ *Buoyant Waitrose to open 39 new stores*, The Guardian, 5 January 2011.

¹¹ The Co-operative Bank (2009), *Ten Years Of Ethical Consumerism 1999-2008*, Manchester

ethical values as one of the reasons to try something new for the first time. In all four countries, they concluded, shoppers expected to be spending more on all the ethical areas they were asked about.¹²

- Mintel, a leading market research organisation, reported in 2009 that

*The market for ethical clothing is going from strength to strength, as consumers continue to seek out clothing that takes into consideration the impact of production and trade on the environment and on the people behind the clothes we wear....Growth in ethical clothing is being driven by consumer demand for fairly produced and sustainable goods, which is being met by growing numbers of fashion-led independents, and now some high street majors.*¹³

- In commercial tourism, environmental and social concerns and cultural and natural heritage have become more prominent; in 2000, the Association of Independent Tour Operators adopted a set of guidelines for sustainable tourism. These stated that tour operators and all those working with them should recognise their responsibilities to:
 - *Protect the Environment – its flora, fauna and landscapes*
 - *Respect local cultures – traditions, religions and built heritage*
 - *Benefit local communities – both economically and socially*
 - *Conserve natural resources – from office to destination*
 - *Minimise pollution – through noise, waste disposal and congestion*
- In the creative industries, digital media have opened up new opportunities and enabled emerging artists or craftspeople to reach new markets. Although 'creative' employment has often been more closely associated with urban centres, new technology enables people to live and work successfully in remoter areas such as Shetland, engaging in online sales and computer-aided design and production. It is also likely that crafts that are inspired by tradition, that are authentic and are produced with integrity will benefit from the wider demand for products having these characteristics.
- Concerns about the environment and, in particular, climate change have focused attention on renewable energy. The availability of powerful wind, waves and tides mean that Shetland is well placed to take advantage of renewable energy, whether to serve its own needs or, more controversially, for export. Shetland already hosts pioneering projects in hydrogen and zero-carbon technology. These 'clever' solutions to pressing environmental challenges are likely to be of interest to 'successful idealists'.

¹² See <http://www.igd.com/index.asp?id=1&fid=6&sid=25&tid=0&folid=0&cid=1548>

¹³ Mintel press release, April 2009

Given the difficulties affecting some national economies, in particular some within the euro zone, it would be foolhardy to assume that outlook is secure. However, the evidence suggests that the recession has had a limited effect on those 'premium' markets at which Shetland ought to aim. For example, retail analysts Kantar Worldpanel reported in June 2010 that in the grocery market, customers were trading up rather than down¹⁴. Earlier in the year, and confirming other reports, the same firm noted that Waitrose, at the top of the market, had seen sales grow by 11.7% while low-cost store Asda had managed less than a fifth of that, 2.5%¹⁵.

Local producers who want to satisfy a discriminating national or international market need to be well aware of market trends. Some businesses in Shetland work hard to achieve that understanding, for example by ensuring that they keep up to date with the preferences of a high-class butcher in London or knitwear buyers in mainland Europe, the USA or Japan. The indications are that, if Shetland can offer products and experiences that satisfy the needs of customers who are concerned with origin, authenticity, integrity and sustainability, the islands will find that their proposition has a ready and growing market. The ingredients are clearly in place, for Shetland's strengths – summarised in section 1.2 above and mirrored in the work done on the Shetland brand – are exactly those that are in demand from a substantial and growing market sector.

10. The Policy Background

In this section, we consider the policies and strategies that form the background to efforts to improve Shetland's marketing performance and promote its products and services more successfully. In particular, we find evidence that the trends that are so evident in the marketplace are equally apparent in public policy and in producer strategies. A fuller account of these will be found in Appendices 1 and 2.

10.1 International strategies

The international background includes many strategies and statements of public policy, in which concerns about sustainability and about maintaining and enhancing the value of the cultural and natural heritage are prominent. For example, one major international study¹⁶ is examining the links between the economy and biodiversity.

In cultural and natural heritage, an essential milestone was the adoption, in 1972, of the

¹⁴ See <http://www.globalstorefocus.com/1007/9.html>

¹⁵ See <http://www.moreaboutadvertising.com/2010/04/waitrose>

¹⁶ For full details, see the TEEB website at <http://www.teebweb.org/US/Default.aspx>



UNESCO World Heritage Convention, which committed signatories to put in place measures not only for the protection of cultural and natural heritage but ‘to strengthen appreciation and respect by their peoples of the cultural and natural heritage¹⁷. Around the world, there was a new focus on the importance of interpreting and presenting heritage, reflected locally in *Interpreting Shetland*, published in 1983¹⁸. 2002 saw the adoption of the Cape Town Declaration¹⁹ on responsible tourism. The declaration recognised ‘the diversity of our world’s cultures, habitats and species and the wealth of our cultural and natural heritage, as the very basis of tourism’. Five years later, the European Commission published its *Agenda for a sustainable and competitive European tourism*²⁰ and, in June 2010, it adopted a *Communication*²¹ that aims to retain Europe’s position as the world’s top tourism destination, but with a clear emphasis on sustainability and high quality.

10.2 UK and Scottish strategies

A number of UK and Scottish organisations have policies and objectives that influence their activities in or support for Shetland. In terms of their relevance to Shetland, some of the main agencies include:

- **The Heritage Lottery Fund**, which invests around £180 million a year in a wide range of heritage projects that it considers will have ‘a lasting impact on people and places’. In a recent report²², the Fund stresses that Britain’s core strengths as a visitor destination are rich, vibrant and accessible heritage, history, pageantry and culture;
- **The Scottish Government**, which promotes an economic strategy that aims to make Scotland wealthier and fairer; smarter; healthier; safer and stronger; and greener²³;
- **VisitScotland**²⁴, the national tourism organisation, which operates the tourist office at the Market Cross in Lerwick and the information point at Sumburgh Airport. Its classification and grading system for accommodation and facilities operates in Shetland and it undertakes promotional activities that involve Shetland, including the production of a brochure;

¹⁷ UNESCO, 1972, World Heritage Convention, Article 27.

¹⁸ Shetland Islands Council (1983), *Interpreting Shetland*, Lerwick

¹⁹ For the text of the full declaration, see:

<http://www.responsibletourismpartnership.org/CapeTown.html>

²⁰ Commission of the European Communities (2007), *Communication from the Commission: Agenda for a sustainable and competitive European tourism*, COM(2007) 621 final, Brussels

²¹ See European Commission (2010), *Tourism: keeping Europe the world’s top destination*, Brussels (Memo/10/289)

²² Heritage Lottery Fund (2010), *Investing in success*, London

²³ See: <http://www.scotland.gov.uk/Publications/2007/11/12115041/0>

²⁴ <http://www.visitscotland.com/>

- **Creative Scotland**²⁵, ‘the new national leader for Scotland’s arts, screen and creative industries’, which has a remit to ‘invest in talented people and exciting ideas, develop the creative industries and champion everything that’s good about Scottish creativity’. Gwilym Gibbons, Director of Shetland Arts, was appointed by Scottish Ministers to the Board of Creative Scotland in 2010;
- **Historic Scotland**²⁶, the government agency charged with safeguarding the nation’s historic environment and promoting its understanding and enjoyment on behalf of Scottish Ministers. Several of its ‘properties in care’ are in Shetland, namely the Ness of Burgi fort, Jarlshof, the brochs of Mousa and Clickimin, Fort Charlotte, the castles at Scalloway and Munes and the Staneydale Temple.
- **Scottish Natural Heritage**, funded by the Scottish Government, which aims to promote care for and improvement of the natural heritage, help people enjoy it responsibly, enable greater understanding and awareness of it and promote its sustainable use. In Shetland, Scottish Natural Heritage operates local visitor services, employing staff to manage reserves and operate the Noss and Hermaness visitor centres²⁷.
- The **Royal Society for the Protection of Birds**²⁸, which champions birds and wildlife and is the largest wildlife conservation organisation in Europe, with over one million members. It operates nature reserves in Shetland and, from its base at Sumburgh Head Lighthouse, employs local officers and rangers.
- **Museums Galleries Scotland**²⁹, a charitable trust, is the main conduit for Scottish Government funding to the sector and manages programmes on the Scottish Government’s behalf. Seven of Shetland’s museums or heritage centres, including the Shetland Museum and Archives, are registered with Museums Galleries Scotland.

10.3 *Recent Shetland Strategies*

This section (again, amplified in Appendices 1 and 2) outlines a number of Shetland strategies prepared by individual organisations or by local partnerships:

- In **Community Planning**, Shetland’s Long Range Forecast project resulted in the adoption of the *Shetland Resolution*, reproduced in full in Appendix 1. It clearly endorses an approach to development that is based on excellence, fine quality, unique origin, respect for the heritage and the cherishing of our traditions and values. Progress is annually monitored in a report entitled

²⁵ See <http://www.creativescotland.com/#/about/about-overview>

²⁶ See <http://www.historic-scotland.gov.uk/corporate-plan-2008-2011.pdf>

²⁷ See <http://www.snh.gov.uk/about-snh/snh-in-your-area/northern-isles/>

²⁸ See <http://www.rspb.org.uk/>

²⁹ <http://www.museumsgalleriesscotland.org.uk/>

*Sustaining Shetland*³⁰, which reveals an economy that, whilst vibrant, is more fragile than it appears. It also shows that Shetland has a lower proportion of its population working in management, professional, technical, administrative and secretarial roles than the Scottish average. The Shetland Resolution and the related priorities are also reflected in the Single Outcome Agreement, annually negotiated between the Shetland Community Planning Partnership and the Scottish Government;

- The most recent **economic development strategy**, *Shetland 2012*³¹, seeks to help Shetland ‘maintain and enhance prosperity by enabling businesses, communities and individuals to attain their full economic potential’. It identifies five priorities, namely: improvement of the marketing of Shetland and Shetland products; skills development; improving our communication links with the outside world; economic diversification; and strengthening rural communities in Shetland;
- The **Shetland Cultural Strategy**³² seeks to ensure that Shetland’s cultural assets are conserved, developed and supported in order to allow everyone to reach his or her potential; strengthen community identity pride and confidence; and secure prosperity for the benefit of present and future generations. It intends that Shetland’s cultural assets will be recognised as among the richest and most diverse to be found anywhere;
- **Shetland Amenity Trust** sets out its strategic objectives in its Strategic Plan, contained within its Corporate Plan³³. These focus on Shetland’s cultural and natural heritage. The Trust seeks to raise awareness of these, promote investment in them and offer high-quality interpretation. The Trust has undertaken the construction and management of the new Shetland Museum and Archives, recognised as an outstanding facility, and has developed a ‘heritage brand’ and Museum and Archives ‘sub-brand’. The Trust intends to build on these achievements in undertaking major projects at Sumburgh and Old Scatness Broch. The Trust has undertaken a valuable project intended to encourage a renaissance in Shetland fine lace. Other priorities include the application of best environmental practice;
- the **Shetland Arts Development Agency**³⁴ (Shetland Arts) aims to encourage and assist in promoting and advancing the creation, practice, presentation and study of all forms of art – visual, performing and creative. Its strategy, A

³⁰ The most recent report, published in winter 2009, can be found online at <http://www.shetland.gov.uk/policy/documents/SustainingShetland09.pdf>

³¹ Shetland Local Economic Forum (2003), *Shetland 2012*, Lerwick

³² Shetland Community Planning Board (2009), *On the Cusp...Shetland’s Cultural Strategy: A vision for cultural life in Shetland 2009-2013*, Lerwick

³³ Shetland Amenity Trust (2008), *Corporate Plan 2008-11*, Lerwick

³⁴ Shetland Arts Development Agency (2009), *Business Plan 2008-2013*, Lerwick

*Hansel for Art*³⁵, supports the development of the creative sector, for example through the construction of Mareel, a high-quality cinema and music venue incorporating state-of-the-art recording facilities and appropriate social spaces. Shetland Arts also operates the Garrison Theatre in Lerwick and the Bonhoga Gallery in Weisdale and is managing the preparation of an Events and Festivals Strategy in collaboration with Shetland Islands Council and other partners. Shetland Arts has invested in creative development projects, has applied grant aid and mentoring to improve contemporary craft and textiles products and is developing a craft trail;

- In **sport and leisure**, a strategy approved in 2003³⁶ identified priorities in five groups, access; healthy communities; coordination of opportunities; developing sport; and excellence. The principal provider of sport and leisure facilities in Shetland is the **Shetland Recreational Trust**, which seeks to offer sporting and recreational opportunity to everyone, with particular emphasis on disadvantaged groups;
- A **Shetland Countryside Access Strategy** was published in 2005. The strategy has three main building blocks, namely access routes that are already promoted, the development of a strategic long distance route; and community networks;
- In seafood, **Successful and Sustainable: A Strategy for Shetland Seafood**, published in 2007, has the objective of increasing the value of Shetland seafood³⁷. It advocates the sustaining and strengthening of the industrial cluster, product improvement, targeting of higher value markets, improving working practices and developing skills and career opportunities; and
- The preparation of a **strategy for Shetland's agricultural sector** is being undertaken by AB Associates. The vision is 'to promote and enhance a diverse, competitive and sustainable agricultural industry in Shetland'. The Shetland Livestock Marketing Group³⁸ (SLMG) is a farmer cooperative involving some 300 members.

Several strategies, surveys or reports are relevant in tourism:

- the **Shetland Tourism Plan 2006-2009**³⁹ expressed the intention that Shetland would become 'a year-round destination

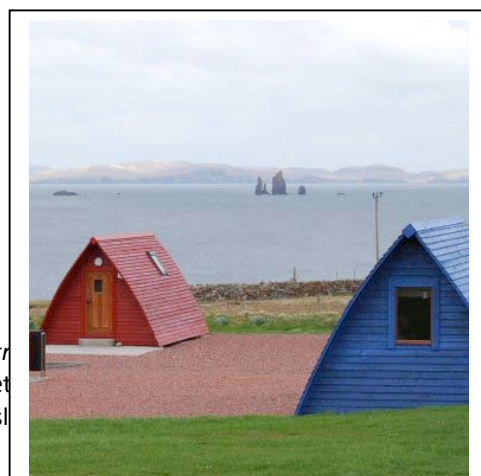
³⁵ Shetland Arts (2008), *A Hansel for Art*, Lerwick

³⁶ Shetland Islands Council (2003), *A Sport and Recreation Strategy*

³⁷ HIE Shetland, NAFC Marine Centre, Seafood Shetland, Shetland Recreational Trust, Shetland Fish Producers' Organisation and Shetland Islands Council (2007), *Successful and Sustainable: A Strategy for Shetland Seafood*, Lerwick

³⁸ See <http://www.tasteshetland.com/about.php>

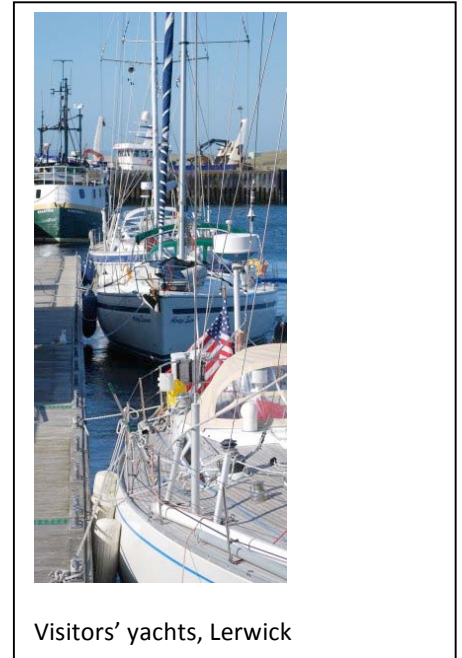
³⁹ Shetland Islands Council (2006) *Shetland Tourism Plan 2006-2009*



Innovative visitor accommodation, Eshaness

offering a high-quality product and experience’;

- the 2005/06 **Shetland Visitor Survey**⁴⁰ found that visitor numbers were rising and that, for the first time, holiday visits outnumbered business visits. 69% of visitors were from the ABC1 social group. Visitors’ top ratings were for archaeological sites, the quality of local food and the Tourist Information Centre; the lowest ratings were for things to do on wet days, shops and the quality of other (non-local) souvenir products;
- A **Heritage Plan for Shetland**⁴¹ was prepared for Shetland Islands Council in 2006. It underlined and quantified the importance of heritage tourism in Shetland. Examining consumer trends, the study noted the increased interest in special interest holidays and special, authentic experiences; a move towards shorter breaks within 3 hours’ travel time, often booked quite late; a focus on health and well-being; and an increased interest in the educational aspects of travel and in culture and history;
- This work was taken forward in Shetland Islands Council’s **Heritage Tourism Investment Programme 2007-2012**⁴². It noted that Shetland’s heritage is ‘a major economic asset in a wider sense, since it is a tool for strengthening the islands’ reputation for distinctiveness and high quality among those who may wish to buy our products, move here or invest here’; and
- At the end of 2007, a report on **Shetland’s requirements for visitor accommodation**⁴³ recorded 323 properties offering visitor accommodation, of which 216 were registered with VisitScotland. It recommended a number of priorities, including upgrading of hotels, the creation of new, high-quality guest houses, extending the season and increased use of local produce on menus.



All of the work of larger organisations such as the Council, Shetland Amenity Trust and Shetland Arts is reinforced by smaller voluntary bodies, such as the Shetland Heritage Association, which was formed in 2000, and Shetland Tourism Association (STA), set up in 2005.

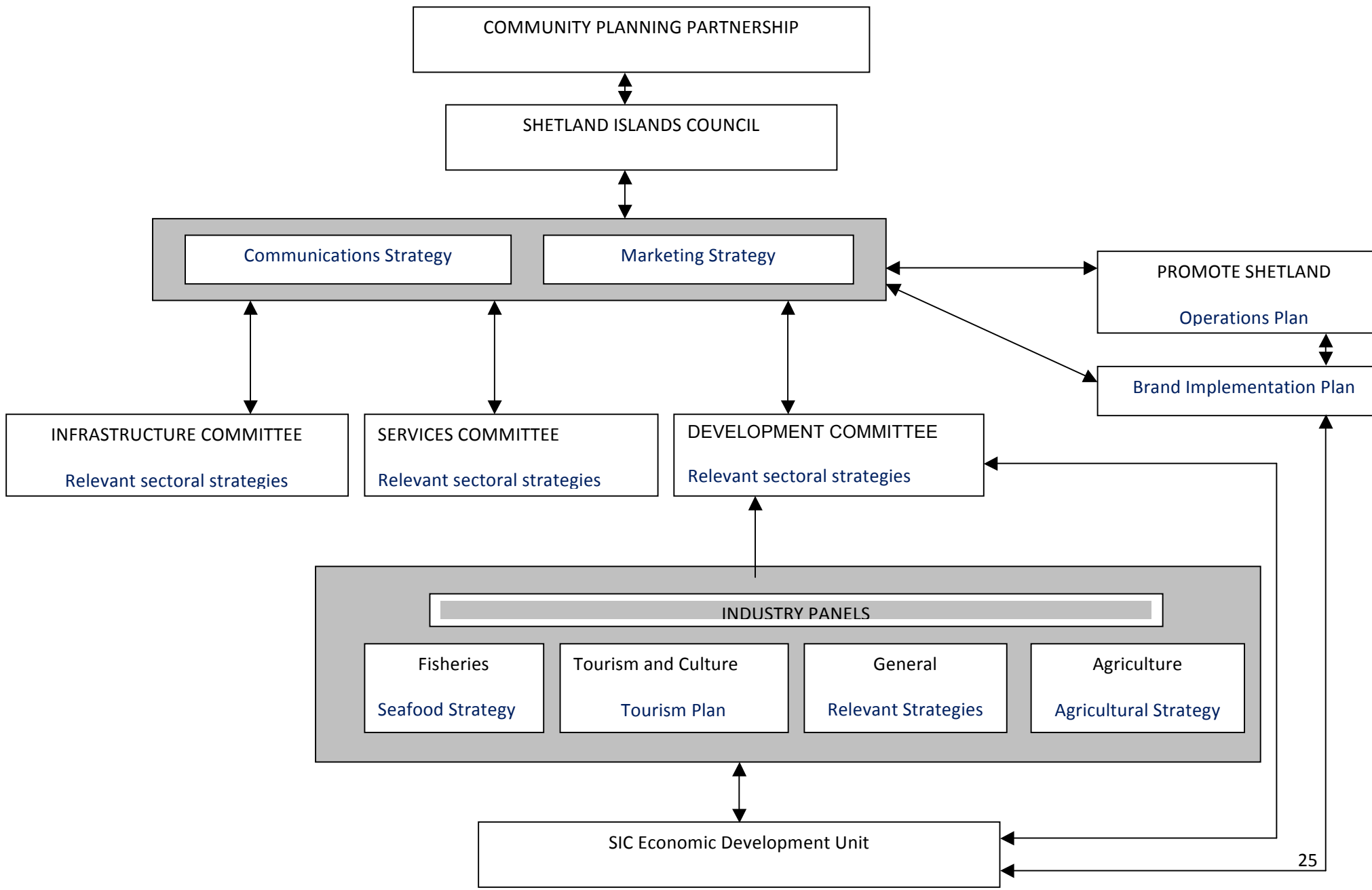
⁴⁰ AB Associates (2006), *Shetland Visitor Survey 2005/06*, Shetland Enterprise, Lerwick

⁴¹ Westbrook, S (2006), *A Heritage Plan for Shetland*, Nairn.

⁴² Shetland Islands Council Economic Development Unit(2007), *Heritage Tourism Investment Programme 2007-2012*, Lerwick

⁴³ Westbrook, S (2007), *Shetland’s Visitor Accommodation Requirements for the 21st Century*, Nairn

The relationships between the principal strategies relating to economic development in which the Council is involved are illustrated in the diagram on the next page.



11. *The Key Challenges*

The message from these strategies and research projects echoes that from the marketplace, which is that there is an increasing demand for products and services that are of high quality, are authentic, have an identified origin and demonstrate integrity.

Many Shetland producers have already chosen to move in that direction and, if more are inspired to do so, the prospects will be excellent. Shetland's environment, natural resources and cultural heritage are of high quality. Whether in offering outstandingly good seafood, unique lamb, contemporary crafts inspired by tradition, a memorable holiday or a place to study or live, Shetland has an enviably strong foundation on which to build.

There are, of course, challenges. They lie in making available, to the most promising customers, Shetland products or experiences that match and preferably exceed their expectations. Since it is people's experience of a place and its products that really counts, it's primarily by our *actions* that we shall maximise Shetland's potential, including:

- the production of excellent goods and services by our businesses
- the creative output of our artists, craftspeople and musicians;
- the things that our public institutions do, the policies they pursue and the way that our leaders behave;
- the way in which we act as individuals and ambassadors, whether we are welcoming visitors into our guest house, negotiating an engineering contact with an oil company or competing in the Island Games

Co-ordination of these actions is a challenge in itself. If Shetland were a sixareen, it would be essential to ensure that all the rowers were working in unison and heading for the same destination. That means that whether we're in business; in the arts, sport or heritage sectors; working in local government; pursuing economic development; offering experiences to visitors; or simply going about our daily lives, we need to pull together. For example, whilst the Shetland Islands Council's new emphasis on communication is to be welcomed, there need to be strong links between those efforts and the work done by other partners, including Promote Shetland. At present, the Promote Shetland Steering Group provides a vehicle for ensuring co-ordination, but it may need to adapt or change in order to meet the need for a body that has the necessary breadth and influence.

Promote Shetland’s remit covers the whole of Shetland’s economy. However, the work that it does in tourism is especially significant, not because tourism is our largest industry – it isn’t – but because, as place-branding writer Simon Anholt⁴⁴ has pointed out, tourism has ‘permission’ to engage in promotion, in other words the global audience sees tourism promotion as ‘a legitimate representation’ of the place whereas they might well dismiss other kinds of state-sponsored advertising. ‘Tourism promotion’, he continues, ‘can tell people what the place looks like, what sort of people live there, what sort of things those people do and make, the climate, the food, the culture and the history of the country’.



Getting closer to customers: Orcadian business, Judith Glue, has a shop in Inverness. Ortak, another Orkney business, has 13 shops outside Orkney, stretching from Aberdeen to Sheffield.

The research undertaken for this strategy, involving more than 70 local organisations and businesses identified six key challenges, namely:

(a) Keeping the promise of quality

This is not a new challenge. It was identified by Corporate Edge as the core issue for the Shetland brand. As they said: ‘if the Shetland brand is to assert itself as the master brand, it must be the master of what quality means’. Our respondents recognised that any ‘disconnect’ between the aspiration to focus on ‘successful idealists’ and the reality of what is offered will constrain Shetland’s prospects. In a nutshell, if we are promising fine quality to people who are focused on origin, authenticity and integrity, we must deliver it, consistently.

(b) Understanding and defining our customers

As well as being a challenge identified by survey respondents, this is one of the issues identified

in *Successful and Sustainable: A Strategy for Shetland Seafood*. Business people in Shetland who want to export their product have fewer opportunities to meet and learn about their customers than their competitors located closer to major markets. Because of the costs in time and money that it entails, distance is a barrier to experiencing the marketplace, assessing opportunities, observing trends and absorbing creative influences. In all of these senses, lack of understanding of the market constrains confidence; this consequence of Shetland’s location is much less commonly acknowledged than the narrower one of the price of freight, yet it may be at least as important, or indeed even more so. A further factor that may have some bearing on our perception of the nature and scale of market

⁴⁴ Anholt, S. (2007), *Competitive Identity*, p.88.

opportunities is that (according to the Office for National Statistics⁴⁵) the ABC1 social group, in which most of our most promising customers are to be found, is significantly under-represented in Shetland, accounting for just 29.8% of the population compared with 42.1% in Britain as a whole.

(c) Product development

Many of our respondents wanted much clearer identification of exported products as being from Shetland, which is of course related to the 'origin' component of the brand. They also wanted products to be offered in a form that customers would find attractive and convenient, which in turn is linked to market understanding and would depend on thoughtful design. Translating our natural welcome and hospitality into excellent customer service was also seen as a priority. In tourism, respondents said that we should make it easier for visitors to plan a trip, to get the most out of their visit and to enjoy Shetland out of season. In attracting new migrants or students, we should ensure we provide the facilities and help they need.

(d) Transport and distribution

For Shetland, transport in all its forms is a vital issue. The costs of fares and freight were said by respondents to constrain business, limit customer contact and deter some visitors; capacity of ferries and aircraft was also seen as a constraint. The cost and reliability of freight services was mentioned by a number of respondents. For smaller businesses, there were logistical barriers associated with distributing relatively small quantities of products in mainland Scotland or farther afield. There was a desire for better links to London, Norway, Sweden, Finland, Denmark and Germany, perhaps entailing a weekly flight or (for Scandinavia) the return of the Norröna.

(e) Stabilising and increasing population

The paradox of a slowly declining population in a thriving economy with very low unemployment and relatively high average income did not escape our respondents. Although in-migration by an older age-group or associated with the project under way at Sullom Voe may be temporarily reversing that trend, the challenge is to attract younger people to live in the islands, and hold on to more young local people or attract them back as graduates. This must depend on the creation of employment and on offering an outstanding quality of life: many suggestions were made about how that might be done; for example, one respondent proposed that some of those who have come to work in Shetland on a short-term basis might be persuaded to stay.

(f) Making the most of Promote Shetland

Our respondents thought that Promote Shetland should target its efforts where the best opportunities lay, implying engagement only with those producers and operators

⁴⁵ See: *Social Grading and the Census*, International Journal of Market Research, 22 June 2004

committed to excellence. It should encourage improvement in products and services. Promote Shetland needed to be credible, positive, passionate and fair. It should concentrate on things that were good and authentic; everything must be believable and provable.

The preceding paragraphs are a very brief summary of the comments made to us by those interviewed during the research for this strategy. Two fuller analyses of the hundreds of comments and suggestions made are available separately⁴⁶ and, in preparing its annual Operational Plan, Promote Shetland will examine and, where appropriate, pursue the ideas contained in those survey responses. For example, the experimental revival of an air link to Faroe – albeit on a one-off basis – was pursued in the summer of 2010. However, some of these issues need to be addressed in more depth than is possible or appropriate in this strategy. For example, Promote Shetland will bring the comments made about transport to the attention of those responsible for preparing the Zet-trans strategy.

12. Promote Shetland's objectives

To fulfil its aim, Promote Shetland has developed a set of strategic objectives. These will be achieved by undertaking actions specified in Promote Shetland's annual Operational Plan. Every action will be capable of being monitored. Each year, the priorities to be pursued will be determined in the light of this strategy, of the progress made towards these objectives and, of course, any change in circumstances. The objectives are as follows:

1. Galvanise public authority, NGO, private and educational stakeholders around a common vision⁴⁷ to deliver and market high quality Shetland products and services;
2. Inspire the wider community to support and play its part in helping to deliver the common vision;
3. Encourage and support the development and delivery of consistently high quality Shetland products, services and experiences;
4. Keep in touch with and better understand our existing and potential customers;
5. Develop and deliver innovative place-making initiatives that enhance the recognition and reputation of Shetland's name and give priority to tourism, energy, food & drink, technology and textiles sectors over the next 3 years;
6. Identify and work with passionate people, in and outwith Shetland, to champion Shetland and act as ambassadors to encourage trade, talent, inward investment and tourism;

⁴⁶ See *Promote Shetland: Survey Responses by Sector* (Lerwick 2010) and *Promote Shetland: Survey Responses by Topic* (Lerwick 2010).

⁴⁷ Please see Appendix 4.

7. Position and promote Shetland as the geographical, cultural and technological hub between the UK and Scandinavia with a view to encouraging cross-border initiatives that are mutually beneficial for the North Atlantic community; and
8. Focus and optimise resources to ensure effective co-ordination and judicious targeting of priorities and to avoid duplication of effort.

In developing its Operational Plan, Promote Shetland will include provisions for crisis management. There must be a sound basis for action should the islands be affected by an event that could damage the islands' reputation or ability to reach customers.

Appendices

1. Public sector strategies and reports
2. Policy, marketing and promotion in the private and NGO Sector
3. Project Selkie: the recommended brand strategy for Shetland
4. Marketing Shetland: Our Vision

Public sector strategies and reports

This appendix summarises relevant international, national and local strategies. There are, of course, hundreds or even thousands of such documents and the purpose here is to indicate the direction in which policy has moved rather than list or paraphrase every such statement.

(1) National or international statements of policy or strategy

Scottish Government strategy

In Scotland, the government's economic strategy sets out five strategic objectives, aiming to create a Scotland that is:

- Wealthier and fairer, enabling businesses and people to increase their wealth and more people to share fairly in that wealth;
- Smarter, expanding opportunities for Scots to succeed from nurture through to lifelong learning, ensuring higher and more widely shared achievements;
- Healthier, helping people to sustain and improve their health, especially in disadvantaged communities, ensuring better, local and faster access to health care;
- Safer and stronger, helping local communities to flourish, becoming stronger, safer places to live, offering improved opportunities and a better quality of life; and
- Greener, improving Scotland's natural and built environment and the sustainable use and enjoyment of it.

Cultural, natural heritage and tourism strategies

The UNESCO World Heritage Convention

In the cultural and natural heritage, an essential milestone was the adoption, in 1972, of the UNESCO World Heritage Convention, which committed signatories to put in place measures not only for the protection of cultural and natural heritage but 'to strengthen appreciation and respect by their peoples of the cultural and natural heritage'⁴⁸.

The Cape Town Declaration

In 2002, in an event linked to the Johannesburg Earth Summit, the Responsible Tourism Partnership organised the Cape Town Conference, which approved the Cape Town Declaration⁴⁹ on responsible tourism. The declaration recognised 'the diversity of our world's cultures, habitats and species and the wealth of our cultural and natural heritage, as the very basis of tourism'. It went on to define responsible tourism as tourism that:

⁴⁸ UNESCO, 1972, World Heritage Convention, Article 27.

⁴⁹ For the text of the full declaration, see: <http://www.responsibletourismpartnership.org/CapeTown.html>

- minimises negative economic, environmental, and social impacts;
- generates greater economic benefits for local people and enhances the well-being of host communities, improves working conditions and access to the industry;
- involves local people in decisions that affect their lives and life chances;
- makes positive contributions to the conservation of natural and cultural heritage, to the maintenance of the world's diversity;
- provides more enjoyable experiences for tourists through more meaningful connections with local people, and a greater understanding of local cultural, social and environmental issues;
- provides access for physically challenged people; and
- is culturally sensitive, engenders respect between tourists and hosts, and builds local pride and confidence.

The European Commission

In 2007, the European Commission published its *Agenda for a sustainable and competitive European tourism*⁵⁰. It established the following principles:

- take a holistic and integrated approach;
- plan for the long term;
- achieve an appropriate pace and rhythm of development;
- involve all stakeholders;
- use best available knowledge;
- minimise and manage risk;
- reflect impacts in costs;
- set and respect limits, where appropriate; and
- undertake continuous monitoring.

The *Agenda* explained the Commission's role, noting that it should mobilise actors to produce and share knowledge (for example, through alliances between destinations), promote destinations of excellence, mobilise EU financial instruments and ensure that sustainability and competitiveness were in the mainstream of Commission policies.

In June 2010, the European Commission adopted a *Communication*⁵¹ that 'aims to keep Europe the world's top tourism destination'. The *Communication* concerned a new EU tourism policy framework that is intended to achieve results by:

1. Improving the competitiveness of the tourism sector in Europe through: boosting innovation; improving professional skills; extending the tourist season; diversifying

⁵⁰ Commission of the European Communities (2007), *Communication from the Commission: Agenda for a sustainable and competitive European tourism*, COM(2007) 621 final, Brussels

⁵¹ See European Commission (2010), *Tourism: keeping Europe the world's top destination*, Brussels (Memo/10/289)

the tourism offer; and improving socio-economic knowledge in tourism to develop better coordination of European research;

2. Promoting sustainable, responsible and qualitative tourism through: best practice exchanges among networks (such as EDEN and NECSTouR); labelling of sustainably-managed destinations; awareness campaigns to encourage responsible tourist attitudes; a 'quality tourism' label; a charter, linked to a European prize, for sustainable and responsible tourism; identification of risks relating to climate change; a strategy for sustainable coastal and marine tourism; improved cooperation between the EU, the main emerging countries and the Mediterranean countries, to promote sustainable development and best practice;
3. Enhancing Europe's image as home to sustainable and high quality destinations through: the creation and promotion of a 'European brand' in close cooperation with the Member States; improved cooperation with national organisations and the European tourism industry to promote European tourism products via the portal visiteurope.com; better promotion of European tourism at major events, such as cultural or sport events; and strengthening of the participation of the European Union in the framework of international organisations, such as the World Tourism Organisation (WTO), OECD, T20 and Euro-Med; and
4. Maximising the potential of EU policies and financial instruments for the development of European tourism through the integration and coordination of policies affecting tourism, such as passengers' rights, consumer protection and the internal market.

The Heritage Lottery Fund

The Heritage Lottery Fund (HLF), a non-departmental public body, invests around £180 million a year in a wide range of heritage projects that it considers will have 'a lasting impact on people and places'. HLF has supported more than 33,900 projects across the UK, including several in Shetland, through distributing about £4.4 billion. A report by the Heritage Lottery Fund, *Investing in success*⁵², points out that Britain's core strengths as a visitor destination are heritage, history, pageantry and culture and that what Britain offers in these terms is not only extraordinarily rich but also vibrant and accessible. It notes that heritage is the most important single factor influencing visits to Britain and that the heritage tourism sector was worth £12.4 billion in 2009 (£20.6 billion if 'multiplier' effects are added), of which 59% was based on the built heritage and museums sector and 31% on the natural heritage. UK residents accounted for 60% of expenditure and the indications are that there is potential for further growth, of the order of 2.6% per annum until 2018.

VisitScotland

⁵² Heritage Lottery Fund (2010), *Investing in success*, London

VisitScotland⁵³ is the national tourism organisation, established under the Development of Tourism Act 1969 as amended by the Tourism (Overseas Promotion)(Scotland) Act 1984. VisitScotland does not carry out its functions on behalf of the Crown; it is classified as an executive non-departmental public body. The information below is based on that available on VisitScotland's website. The Act gives VisitScotland the following functions, duties and powers:

- to encourage people to visit Scotland and people living in Scotland to take their holidays there;
- to encourage the provision and improvement of tourist facilities in Scotland; and
- to give advice to Ministers and public bodies on tourism matters.

The 1969 Act gives VisitScotland wide discretionary powers with which to discharge these functions. In addition, VisitScotland has specific powers, the most important of which are:

- to promote or undertake publicity in any form;
- to provide advisory and information services;
- to promote or undertake research; and
- to give financial assistance for the carrying out of any project which, in VisitScotland's opinion, will provide or improve tourist amenities and facilities in Scotland.

The Scottish Ministers' overall aim for VisitScotland is to help maximise the economic benefit of tourism to Scotland. The Board will do so, either at its own hand or by other means, by:

- Providing the industry with strategic leadership and guidance;
- Marketing Scotland as a world-class visitor destination;
- Encouraging and securing the highest quality of standards in the industry;
- Ensuring the highest quality of advice to potential visitors;
- Encouraging the spread of tourism throughout Scotland and throughout the year;
- Undertaking research and analysis and disseminating findings effectively throughout the industry; and
- Ensuring the benefits of public sector support for Scottish tourism are maintained and improved through effective co-operation and co-ordination of the efforts of the public sector bodies and the private sector.

Creative Scotland

During 2010, Creative Scotland⁵⁴ took over the functions of the former Scottish Arts Council and Scottish Screen. It is 'the new national leader for Scotland's arts, screen and creative industries' with a remit to 'invest in talented people and exciting ideas, develop the creative industries and champion everything that's good about Scottish creativity'. Gwilym Gibbons,

⁵³ <http://www.visitscotland.com/>

⁵⁴ See <http://www.creativescotland.com/#/about/about-overview>

Director of Shetland Arts, was appointed by Scottish Ministers to the Board of Creative Scotland in 2010.

Historic Scotland

Historic Scotland is an executive agency of the Scottish Government. It is charged with safeguarding the nation's historic environment and promoting its understanding and enjoyment on behalf of Scottish Ministers.

Historic Scotland's *Corporate Plan*⁵⁵ explains that the broad direction for Historic Scotland is set by the Minister, who set the following aims for Historic Scotland:

- To care for, protect and enhance the historic environment;
- To secure greater economic benefits from the historic environment; and
- To help people value, understand and enjoy the historic environment.

Scottish Natural Heritage

Scottish Natural Heritage is funded by the Scottish Government. Its aims are to:

- promote care for and improvement of the natural heritage
- help people enjoy it responsibly
- enable greater understanding and awareness of it
- promote its sustainable use, now and for future generations.

As well as being involved in conserving Shetland's natural environment, Scottish Natural Heritage operates local visitor services, employing staff to manage reserves and operate the Noss and Hermaness visitor centres⁵⁶.

(2) Shetland public sector strategies and policies

Community Planning

In Shetland, all of the trends evident in national policy have been reflected in a number of local policy documents. The overall direction was set in 2004, when the Long Range Forecast project resulted in the adoption of the *Shetland Resolution*:

We shall work together for a future that's better and brighter. In particular, we aim to create a secure livelihood, look after our stunning environment and care well for our people and our culture.

We recognise that we can only succeed in any of these aims by succeeding in all of them.

⁵⁵ See <http://www.historic-scotland.gov.uk/corporate-plan-2008-2011.pdf>

⁵⁶ See <http://www.snh.gov.uk/about-snh/snh-in-your-area/northern-isles/>

In our economy,

- *We want to be known for carefully crafted products and excellent service;*
- *We shall nurture creativity, build skills and encourage enterprise;*
- *We'll promote fine quality and unique origin because they're vital to our customers;*
- *We'll seek to create fulfilling, well paid jobs for all, whatever their talent;*
- *We'll use the natural resources at our disposal responsibly and seek more control over them; and*
- *Public sector resources will be used to stimulate a stronger private sector.*

In our environment, we shall...

- *Take pride in our heritage, natural or manmade, and respect it for its own sake;*
- *Recognise that our livelihood depends on our environment;*
- *Work with nature in all its diversity, not against it;*
- *Restore our environment where it has been damaged;*
- *Use the gifts of nature responsibly; and*
- *Play our part as responsible members of the world community.*

In our community, we shall...

- *Cherish and promote our traditions and our values;*
- *Keep Shetland's people safe and encourage them to be healthier;*
- *Foster confident, thriving communities across Shetland;*
- *Welcome visitors and new Shetlanders from wherever they may come;*
- *Promote justice and equality, here and overseas; and*
- *Expand knowledge, extend opportunities and improve access.*

And...

We may be a small place, but if we're clever we can be more successful.

We may have few people, but we can welcome more.

We may be modest, but we can take pride in our achievements.

We may be remote, but we can be distinctive.

But in everything we do, we must seek excellence.

For community planning purposes, a set of priorities and targets was then developed and progress towards them is annually monitored in a report entitled *Sustaining Shetland*⁵⁷. The annual report contains essential information on the state of Shetland's economy,

⁵⁷ The most recent report, published in winter 2009, can be found online at <http://www.shetland.gov.uk/policy/documents/SustainingShetland09.pdf>

environment and society and links changes at local level to the Scottish Government's priorities, referred to above. The picture suggests that although Shetland performs better than the Scottish average on a number of indices, the economy is more fragile than it may appear, with evidence of a decline in population. Some of the main findings reported in 2009 were that:

- emigration from Shetland now exceeds immigration, with a net loss of 129 people in the six years to 2007/08; the report compares this with Orkney, which saw a net gain of 946 people in the same period;
- life expectancy is similar to the Scottish average for men and slightly higher for women;
- school attainment has risen slightly and is substantially better than the Scottish average;
- the value of the Shetland economy, in real terms, declined between 1998 and 2006 but, between 2003 and 2006, Gross Value Added per head increased from £15,184 to £18,836, just above the Scottish average and substantially higher than the Highlands and islands average of £13,996;
- In 2006, the largest economic sector was fisheries with a value of £225.7m, followed by Shetland Islands Council (£184.9m), oil (£70m), agriculture (£16.7m), tourism (£12m) and knitwear (£3m);
- 87.5% of the population were economically active in 2007/08, more than the Scottish average of 79.7%, and more of them (11.2% compared with 7.6%) were self-employed; and
- Shetland has a higher proportion of people working in skilled trades, personal service, process, plant and machine jobs and elementary occupations than the Scottish average. However, the proportions working in management, professional, technical, administrative and secretarial roles are lower than the Scottish average.

This last finding can be amplified by referring to the official labour market statistics for Shetland⁵⁸ published by the Office for National Statistics. In listing employment by occupation, the figures indicate that those in the first three employment categories (managers and senior officials; professional occupations; and associated professional and technical) account for only 29.8% of the population in Shetland compared with 39.8% in Scotland and 42.1% in Great Britain. This employment group is directly equivalent to the ABC1 socio-economic group⁵⁹.

The *Shetland Resolution* and the related priorities are also reflected in the Single Outcome Agreement, annually negotiated between the Shetland Community Planning Partnership and the Scottish Government. The current (2010/11) agreement highlights the challenges involved in retaining employment and population in Shetland in the face of cuts in public

⁵⁸ See the Office for National Statistics website:

<http://www.nomisweb.co.uk/reports/lmp/la/2038432147/report.aspx?town=shetland>

⁵⁹ See: *Social Grading and the Census*, International Journal of Market Research, 22 June 2004

expenditure and the need to address other issues, particularly those relating to climate change.

Economic Development and Marketing

Shetland 2012

Shetland Islands Council has long been active in economic development. It was instrumental in establishing not only an Economic Development Unit (successor to the Development Department) but also the Shetland Development Trust, which for some years invested in local industry. A range of economic development policies is in operation and there are several assistance schemes relating to particular economic sectors.

The Council's most recent economic development strategy is *Shetland 2012*, which seeks to help Shetland 'maintain and enhance prosperity by enabling businesses, communities and individuals to attain their full economic potential'. It identifies five priorities, namely:

- Improvement of the marketing of Shetland and Shetland products;
- Skills development;
- Improving our communication links with the outside world;
- Economic diversification; and
- Strengthening rural communities in Shetland.

These priorities are, of course, linked. A market-led approach to development should produce benefits in encouraging economic diversification. Development of customer service skills is a vital part of any broadly-based marketing strategy.

Shetland Islands Council's Marketing Strategy

Specific assistance and advice is available from Shetland Islands Council for marketing. In such activities, the Council is mindful of the European Union's restrictions on state aid.

The Economic Development Unit prepared its most recent marketing strategy and accompanying action plan in early 2007; the document is available as a download from the Council's marketing website⁶⁰ and it continues to guide work in the Economic Development Unit. The main aims of the strategy are:

- (1) *To improve Shetland's reputation as a place that offers:*
 - a. *Products of excellent quality that meet the needs and aspirations of the consumers most likely to be interested in what Shetland has to offer; and*
 - b. *Services provided to a standard that consistently exceeds customer expectations.*
- (2) *To enable individuals and businesses to develop and promote Shetland products and services with confidence and pride.*

⁶⁰ See <http://www.shetlandmarketing.org/assets/files/marketing-strategy-2008-2011.pdf>

The strategy goes on to emphasise the need for initial research to help us understand the market and identify Shetland's strengths and weaknesses. A wide range of actions was proposed in the strategy and many of these have already been started or completed.

The Development Plan

Shetland Islands Council prepares a statutory development plan which provides the land-use framework for all kinds of development and seeks to promote economic competitiveness, care of the natural and built environment and social inclusion. The current *Shetland Structure Plan*⁶¹ was published in 2000. Among the key issues it identified were a declining population, housing needs, a fragile economy, environmental protection and peripherality. These issues were also explored in the *Shetland Local Plan*⁶² (2004). Both plans will be replaced in the near future by a new *Shetland Local Development Plan*⁶³, work on which is in progress.

The Rural Development Strategy for Shetland

The *Rural Development Strategy*⁶⁴, published in late 2007, is intended to provide a framework for rural regeneration and a range of funding initiatives, including in particular the LEADER programme. It contains a useful and relatively recent summary of economic, social and environmental trends in Shetland and helpfully identifies the many linkages that exist between the agencies and initiatives that are active in Shetland.

The Shetland Transport Strategy

Approved in 2008, the *Shetland Transport Strategy*⁶⁵ identified a number of key issues, namely:

- a) A changing economic situation for Shetland;
- b) Issues related to reliance on lifeline links;
- c) Changing patterns of mobility within Shetland;
- d) Rising fuel prices;
- e) Responding to climate change;
- f) Responding to opportunities to improve the health of Shetland;
- g) Opportunities arising from new delivery structures;
- h) Constraints on Shetland Islands Council (SIC) and external funding; and
- i) The new relationship between national and local government.

⁶¹ See <http://www.shetland.gov.uk/splan/plan.htm>

⁶² See <http://www.shetland.gov.uk/developmentplans/shetlandlocalplan.asp>

⁶³ See <http://www.shetland.gov.uk/planning/LocalDevelopmentPlan.asp>

⁶⁴ See <http://www.shetlandleader.org/assets/files/Shetland-Rural-Development-Strategy-FINAL.pdf>

⁶⁵ See <http://www.shetland.gov.uk/transport/stp/transportstrategy/documents/ShetlandTransportStrategy050508.pdf>

The strategy contained a vision statement, which commits Zettrans, the local transport partnership,

To develop an effective, efficient, safe and reliable transport system for Shetland. The transport system will comprise an integrated network of accessible, and affordable internal, inter-island and external links, which will contribute to the development of a safe, healthy, vibrant and inclusive society; a diverse, successful and self-sufficient economy, and enhanced environmental quality.

Transport was a major issue for those consulted in the preparation of this strategy for Promote Shetland.

Industry sectoral plans: fisheries and agriculture

Successful and Sustainable: A Strategy for Shetland Seafood

Shetland's largest industry is seafood and, in 2007, partners in the Shetland Seafood Development Project published *Successful and Sustainable: A Strategy for Shetland Seafood*⁶⁶, the objective of which is to increase the value of Shetland seafood. Recognising that the opportunities for Shetland can be most effectively realised through co-operation, the strategy sets out the actions that will achieve positive benefits, which are grouped under the following 'key drivers of success':

- A. Sustain and strengthen the industrial cluster
 - Sustainable and appropriate management of seafood resources
 - Knowledge of the Shetland industry
 - Promote best practice
 - Research and development
- B. Undertake product improvement
 - Quality and traceability
 - Greater added value
- C. Target higher value markets
 - Knowledge transfer between producers and the market
 - Access between producers and high value markets
- D. Improve working practices
 - Efficient and effective operational techniques
 - Modernisation of equipment and facilities
- E. Develop skills and career opportunities
 - Routes into the industry for young people
 - Personal and workforce development
 - Business management skills.

A strategy for Shetland agriculture

⁶⁶ HIE Shetland, NAFC Marine Centre, Seafood Shetland, Shetland Aquaculture, Shetland Development Trust, Shetland Fish Producers' Organisation and Shetland Islands Council (2007), *Successful and Sustainable: A Strategy for Shetland Seafood*, Lerwick

The preparation of a strategy for Shetland's agricultural sector is being undertaken by AB Associates. The vision is:

to promote and enhance a diverse, competitive and sustainable agricultural industry in Shetland.

Industry sectoral plans: culture, sport, heritage and tourism

On the Cusp...Shetland's Cultural Strategy

The second *Cultural Strategy*⁶⁷, published in 2009, set out its vision for cultural life in Shetland as follows:

We seek to ensure that Shetland's cultural assets are conserved, developed and supported in order to allow everyone to reach his or her potential, strengthen community identity, pride and confidence and secure prosperity for the benefit of present and future generations. We intend that Shetland's cultural assets will be recognised as among the richest and most diverse to be found anywhere. We want Shetland to be the most exciting creative and cultural island community in the world.

Many of the intentions set out in the *Cultural Strategy* involve the nurturing of the things that make Shetland special, for example the dialect, the environment and the craft traditions. The strategy also alludes repeatedly to the value of these assets in the promotion of Shetland.

Sport and Leisure

A *Sport and Recreation Strategy for Shetland*⁶⁸ was approved by the Council and its partner bodies in 2003. It identified strategic priorities as follows:

- Access
 - Co-ordination of information
 - Transport and travel
 - Access to facilities
- Healthy Communities
 - Co-ordination of activities
 - Recreational opportunities
 - Breaking down the barriers
- Co-ordination of Opportunities
 - Sporting pathways
 - School sports
 - National Governing Bodies
 - Island Sports Association
- Developing Sport
 - Grant aid

⁶⁷ Shetland Community Planning Board (2009), *On the Cusp...Shetland's Cultural Strategy: A vision for cultural life in Shetland 2009-2013*, Lerwick

⁶⁸ Shetland Islands Council (2003), *A Sport and Recreation Strategy for Shetland*, Lerwick

- Volunteer development
- Coach development
- Focus sport
- Competition
- Sports development plans
- Excellence
 - Pathways to performance
 - Élite competition
 - Major national and international events.

The Shetland Tourism Plan

The aim of the *Shetland Tourism Plan 2006-2009*⁶⁹ was that 'Shetland will become a year-round destination offering a high-quality product and experience'. It argued that aiming for high quality was the best way to achieve sustainable growth and was also the direction in which the market was moving. It was also felt that extending the season should be a priority. Transport costs were also seen as a major challenge but the plan expressed the view that lowering them involved more of an aspiration than an expectation. It is intended that a new Shetland Tourism Plan will be prepared in the near future which will set a course for the development of the industry from 2010 until 2013.

The Shetland Visitor Survey 2005-06

At the end of 2006, the results of the *2005/06 Shetland Visitor Survey*⁷⁰ were published. It found that:

- An estimated 104,241 visitors came to Shetland, spending £16.4m; holidaymakers spent 44% of that sum and business travellers 33% whereas, in the previous survey in 2000, business travellers had spent 45% of the total;
- Overall, for the first time, holiday visits outnumbered business visits; there was an increase in holiday travel in the low season;
- There were more visitors of all kinds but the number of cruise ship passengers and crew more than doubled. The increased cruise ship numbers and shorter stays by other holidaymakers led to a lower average spend per visitor;
- 69% of visitors were from the ABC1 social group;
- Among holiday visitors not visiting friends and relatives (non-VFR), more were female than male; 47% were over 55, most came by sea in high season, 81% were

⁶⁹ Shetland Islands Council (2006), *Shetland Tourism Plan 2006-2009*, Lerwick

⁷⁰ AB Associates (2006), *Shetland Visitor Survey 2005/06*, Shetland Enterprise, Lerwick

first time visitors, most stayed between 1 and 7 nights, Lerwick was the most popular base and 58% came from the UK excluding Scotland. Overall, however, Scotland is the most common origin for visitors to Shetland. 24% of holiday visitors were from overseas;

- Only half as many family groups visited compared with 2000 and, in this respect, Shetland saw proportionately fewer families, couples and groups of friends than Orkney or the Western Isles, probably because of the larger proportion of single business travellers, and average party size was smaller;
- Almost half of visitors, rising to 65% of holidaymakers, had used the internet to find out about Shetland before their trip, usually concentrating on history, culture, nature, visitor centres and attractions. Holidaymakers' main inspirations to visit were birds, wildlife, nature and flora, followed by peace and quiet, remoteness and the scenery;
- Holidaymakers were most likely to be influenced to visit by word of mouth or by previous experience of Shetland rather than by promotional material, though promotional materials, the internet and guide books were significant for first-time visitors;
- The main activities holidaymakers undertook were short walks, beaches and scenery, general sightseeing, bird watching, historic and archaeological sites and painting and photography;
- The improvements most often suggested involved less expensive travel and better public transport and eateries;
- 55% of visitors felt that their expectations had been met, and 42% that they had been exceeded; although very few felt their expectations had not been met, those who were holidaymakers were more likely to feel some disappointment and the number who did so had risen by 2% since 2000. Transport, eating, weather and accommodation were the most common areas of concern, though numbers expressing concern were low, of the order of 3-4%. 91% would recommend Shetland to others; among holiday visitors, 4% would not do so;
- Among those who picked out a highlight of their visit, scenery (14%) was most likely to be mentioned, followed by the people (7%), animals other than birds (6%), visiting friends and relatives (6%) and birds (4%). Sumburgh Head was the most frequently-mentioned place;
- Asked to rate aspects of tourism in Shetland, the top ratings were for archaeological sites, the quality of local food and the Tourist Information Centre; the lowest ratings were for things to do on wet days, shops and the quality of other (non-local) souvenir products; and

- The most frequently mentioned areas for improvement were, in eating out, menus, food quality and numbers of eating establishments; lack of availability of local food products both overall and more specifically fish and at local eateries; in general, a lack of promotion; in accommodation, refurbishment, expense and hygiene; in local arts and crafts, availability, marketing and limited range; in local information, lack of information, timetabling issues, and more detailed maps; and in other respects, signage and walking.

A Heritage Plan for Shetland

Prepared for Shetland Islands Council in 2006, *A Heritage Plan for Shetland*⁷¹ underlined and quantified the importance of heritage tourism in Shetland, identifying the following consumer trends:

- customised and flexible travel (a package, but not a package holiday) to a destination;
- generally within 3 hours' travel time;
- special interest holidays and special experiences;
- an authentic experience (with the experience mattering more than the destination);
- good value for money;
- increasing prevalence of late booking;
- a strong trend towards shorter breaks;
- interest in good health (so even more demand for activity breaks of all kinds);
- the use of a break as a personal reward or well-being experience; and
- the increasing interest in extended education (so more demand for history and culture-related holidays).

The Heritage Tourism Investment Programme 2007-2012

This work was taken forward in Shetland Islands Council's *Heritage Tourism Investment Programme 2007-2012*⁷². It noted that Shetland's heritage is fundamental to the islands' identity and culture, that tourism is a developing industry in Shetland and that heritage is its principal asset, with potential for further development. The programme also stated that:

Shetland's heritage is a major economic asset in a wider sense, since it is a tool for strengthening the islands' reputation for distinctiveness and high quality among those who may wish to buy our products, move here or invest here.

Investment in heritage was also seen as a means to strengthen community and business confidence and provide educational opportunities.

Shetland's Visitor Accommodation Requirements for the 21st Century

⁷¹ Westbrook, S (2006), *A Heritage Plan for Shetland*, Nairn.

⁷² Shetland Islands Council Economic Development Unit(2007), *Heritage Tourism Investment Programme 2007-2012*, Lerwick

At the end of 2007, a report on Shetland's requirements for visitor accommodation⁷³ was undertaken for the Shetland Development Trust by Steve Westbrook. It recorded 323 properties offering visitor accommodation, of which 216 were registered with VisitScotland. Compared with Orkney and the Western Isles, Shetland had fewer 4 or 5 star properties and more 2 star; there was also a higher proportion of hotel accommodation (reflecting business traffic) than in those areas. The study identified the following priorities:

- continuous upgrading of hotels throughout Shetland;
- more participation in schemes such as the Green Tourism Scheme and Walkers Welcome;
- new high-quality guest houses with up to six bedrooms aimed at special interest visitors (e.g. bird watchers and cyclists) as well as the wider market;
- the drawing up of a register of approved properties for use at times of exceptional demand;
- more high-quality self-catering accommodation where required, some geared to specific markets;
- the separation of contractors' workforces from tourists in hotels and guest houses; and
- extend the viable season in outlying areas by supporting, for example, heritage facilities to open for longer;
- encourage better catering and more use of local produce; new, high quality, restaurants with rooms might also be encouraged; and
- encourage operators to offer online booking.

All of this would need to be supported by appropriate marketing and by the availability of grants and sound professional advice. The study suggested that around 12,000 additional tourist visitors per annum might be attracted.

The Shetland Countryside Access Strategy

A *Shetland Countryside Access Strategy*⁷⁴ was published in 2005. It affirms that the countryside of Shetland, with its mixture of coastline, fertile farmland and the open hill, is one of Shetland's greatest assets. The strategy has three main elements, each of which is identified as a project. Intended to form the building blocks that will provide access to Shetland's countryside, they are:

- access routes that are already promoted;
- the development of a strategic long distance route; and
- community networks.

⁷³ Westbrook, S (2007), *Shetland's Visitor Accommodation Requirements for the 21st Century*, Nairn

⁷⁴ See <http://www.shetland.gov.uk/developmentplans/documents/accessstrategyIC0805.pdf>

Policy, marketing and promotion in the private and NGO Sector

The work of national non-governmental organisations

At a national level, many NGOs and voluntary organisations are engaged in work that is relevant to the promotion and marketing of Shetland. For example, the Soil Association⁷⁵ certifies organic standards in many foodstuffs; the Marine Stewardship Council⁷⁶ recognises fisheries that are sustainable; CraftScotland⁷⁷ supports the crafts sector; and the National Trust for Scotland⁷⁸ owns Fair Isle, has property in Unst and partners the Belmont Trust in the marketing of Belmont House. The aims and strategies of some of the other organisations that have particular involvement with Shetland, or whose policies are especially relevant, are outlined in more detail below.

The Royal Society for the Protection of Birds

The RSPB⁷⁹ champions birds and wildlife and is the largest wildlife conservation organisation in Europe, with over one million members. Its work is based on the 'passionate belief' that:

- birds and wildlife enrich people's lives;
- the health of bird populations is indicative of the health of the planet, on which the future of the human race depends; and
- we all have a responsibility to protect wildlife.

The RSPB operates nature reserves in Shetland and, from its base at Sumburgh Head Lighthouse, employs local officers and rangers.

Museums Galleries Scotland

Museums Galleries Scotland⁸⁰, a charitable trust, is the main conduit for Scottish Government funding to the sector and manages programmes on the Scottish Government's behalf. It also lobbies and advocates on the sector's behalf and aims to communicate the Scottish Government's priorities to its membership. It aims to achieve 'a welcoming museums and galleries sector that opens doors and celebrates collections, inspiring creativity, learning and enjoyment for all' and has five core aims:

- Advocate and communicate the contribution museums and galleries make to people's lives;
- Support the development of museums and galleries;

⁷⁵ See <http://www.soilassociation.org/>

⁷⁶ See <http://www.msc.org/>

⁷⁷ See <http://www.craftscotland.org/>

⁷⁸ See <http://www.nts.org.uk/Home/>

⁷⁹ See <http://www.rspb.org.uk/>

⁸⁰ <http://www.museumsgalleriesscotland.org.uk/>

- Promote and provide excellent customer services;
- Build an evidence base to inform policy and support decision-making; and
- Build partnerships and sustainable relationships at national and regional level.

Seven of Shetland's museums or heritage centres, including the Shetland Museum and Archives, are registered with Museums Galleries Scotland

The Association of Independent Tour Operators

Growing interest in, and concern about, the heritage has become as evident in commercial tourism as in public policy. In 2000, the Association of Independent Tour Operators adopted a set of guidelines⁸¹ for sustainable tourism. These stated that tour operators and all those working with them should recognise their responsibilities to:

- *Protect the Environment – its flora, fauna and landscapes;*
- *Respect local cultures – traditions, religions and built heritage;*
- *Benefit local communities – both economically and socially;*
- *Conserve natural resources – from office to destination; and*
- *Minimise pollution – through noise, waste disposal and congestion.*

The work of Shetland's private sector and non-governmental organisations

The private sector

The strategies that support private sector activity in Shetland, as in the fisheries and tourism examples mentioned in Appendix 1, are typically prepared by the Council in partnership with industry. However, many businesses and voluntary organisations in Shetland bring products and services to the market. Our survey has thrown light on the many ways in which they find and listen to customers, develop products and services to meet customers' needs and promote them in the marketplace. However, only a few, mostly larger, enterprises had formal marketing plans. Market research was mostly low-key; simpler approaches used comments forms or visitors' books but larger firms had much more sophisticated arrangements. Promotional activities also varied greatly, from leaflets or flyers to national advertising and professional public relations. Approaches included familiarisation visits for journalists, lunches for local business people, the production of DVDs, operation of websites and participation in social networking sites such as Facebook and Twitter.

Shetland's non-governmental organisations

Shetland has many non-governmental organisations that contribute in one way or another to the islands' quality of life and to their marketing and promotion. They range from hall committees to arts, sporting, tourism or craft organisations. They are listed in the Shetland

⁸¹ See http://www.aito.co.uk/corporate_RTGuidelines.asp

Community Directory⁸². Those included here are either the largest in this category, or are offered as examples of 'umbrella' groups that represent many members.

Shetland Amenity Trust

Shetland Amenity Trust set out its strategic objectives in its *Strategic Plan*, contained within its *Corporate Plan*⁸³. These are to:

- Encourage and facilitate public access to Shetland's cultural and natural heritage;
- Raise awareness of the value of, and the need to invest in, Shetland's heritage and culture;
- Develop, enhance and support Shetland's heritage sector as an integral network;
- Promote Shetland's heritage and culture to a wider audience;
- Develop, reinforce and apply a strong brand identity for Shetland's heritage and culture;
- Deliver the Trust's flagship projects at Sumburgh and Old Scatness Broch as prime visitor attractions;
- Interpret Shetland's heritage and culture, telling the story of Shetland through museum and archives displays, on-site interpretation, publications and web presence; and
- Encourage good environmental practice in the Trust's own activities and throughout Shetland.

The Trust has undertaken the construction and management of the new Shetland Museum and Archives, recognised as an outstanding facility, and has developed a 'heritage brand' and Museum and Archives 'sub-brand'. The Trust intends to build on these achievements in the projects at Sumburgh and Old Scatness Broch.

The Strategic Plan describes in detail how these objectives are to be taken forward in each area of its operations, for example the Museum and Archives; interpretation; natural heritage; archaeology; place names; architectural heritage; environmental improvement; woodlands; and grant aid.

Shetland Arts

The objects of the Shetland Arts Development Agency⁸⁴ (Shetland Arts) are

- To encourage and assist in promoting and advancing the creation, practice, presentation and study of all forms of art – visual, performing and creative;
- To support and encourage new work;
- To improve access to the arts and create opportunities for individuals, geographical communities and communities of interest, at all levels of experience and ability, to

⁸² See <http://www.communitydirectory.shetland.gov.uk/>

⁸³ Shetland Amenity Trust (2008), *Corporate Plan 2008-11*, Lerwick

⁸⁴ Shetland Arts Development Agency (2009), *Business Plan 2008-2013*, Lerwick

participate in and enjoy a diverse range of arts activity through performances, exhibitions and educational activities;

- To create opportunities for personal development through arts activities;
- To promote a culture of life-long learning through a community development approach within the arts;
- To support professional artists through residencies, workshops and performances
- To promote excellence in artistic quality;
- To develop the skills and experience of artist practitioners and participants and encourage learning; and
- To provide facilities to support artistic activities.

Shetland Arts published its strategy, *A Hansel for Art*⁸⁵, in 2008. Taking the view that the creative industries will be one of the key areas of economic growth this century, the strategy identified them as a priority for 2008-10. Shetland Arts' intention is to 'promote Shetland as a creative place with global recognition of its creative industry sector'. It will

- support the development of that industry sector and the relocation of creative industries to Shetland;
- ensure Mareel fulfils its role as a creative hub;
- work with the creative industry sector to develop spaces and places across Shetland to support people working in that sector; and
- in partnership in the Shetland Creative Industries Unit, work to deliver a 10 year plan for the development of creative industry and its supporting infrastructure.

Shetland Arts operates the Garrison Theatre in Lerwick and the Bonhoga Gallery in Weisdale. It is managing the preparation of an Events and Festivals Strategy in collaboration with Shetland Islands Council and other partners.

One of Shetland Arts' two predecessor bodies, Shetland Arts Trust, was responsible for *Developing Music in Shetland*⁸⁶, which recommended that a Music Development Officer should be appointed and that that person should pursue a number of priorities, including:

- infrastructure for music in Shetland, including a venue and a large scale PA system;
- music education, which might include residencies, workshops or evening classes as well as additional instrumental tuition;
- support for the music industry, based on a research project;
- the development of links between music and tourism to ensure better provision for visitors; and
- the provision of musical events in outlying areas.

All of these priorities were subsequently taken forward.

⁸⁵ Shetland Arts (2008), *A Hansel for Art*, Lerwick

⁸⁶ Katherine Campbell (1997), *Developing Music in Shetland*, Shetland Arts Trust, Lerwick

Shetland Recreational Trust

The principal provider of sport and leisure facilities in Shetland is the Shetland Recreational Trust⁸⁷, the aims and objectives of which are as follows:

1. To serve and give substantial sporting and recreational opportunity to all people in each community with particular emphasis on disadvantaged groups;
2. To balance the interests of the greatest number and the greatest need, meeting the requirements of both majority and minority sports;
3. To provide and encourage opportunity for communities to discover new recreational interests by the imaginative use of all resources;
4. To stimulate community initiatives and support community organisations within each Centre; and
5. To meet these objectives in a cost effective manner and within the set financial targets.

The Trust is committed to catering for all sections of society and all levels of sporting aspiration from recreational or social users to beginners, improvers and experts. The facilities serve all types of organisations: teams, leagues, schools, community organisations, clubs and societies. They are managed in order to offer many kinds of socially desirable leisure activities, recreation, sport, social entertainment and voluntary interests and are seen as important facilities in the attraction of tourists.

Shetland Tourism Association

Shetland Tourism Association (STA) was set up in 2005. It represented the Shetland tourist trade in discussions with the new VisitScotland organisation, with Shetland Islands Council (SIC), Shetland Enterprise and other bodies dealing with the industry. It exists to represent its members and has no executive powers. It does, however, support the work of VisitShetland staff and Promote Shetland and wishes to ensure that they have the money and staff needed to provide good services.

The Shetland Heritage Association

Formed in 2000 and reflecting the Shetland community's renewed interest in all aspects of the islands' culture and history, the Association is an umbrella group to 'give a voice' to the voluntary heritage sector in the islands, which caters for around 70,000 visitors a year. It represents 36 member organisations, most of them local history groups. Many SHA members have a specialist interest in particular aspects of Shetland heritage, such as knitwear and weaving, crofting, Shetland dialect, storytelling, family history and the

⁸⁷ See <http://www.srt.org.uk/>

Norwegian connection. Some of the local heritage centres function as Neighbourhood Information Points.

Shetland Livestock Marketing Group

The Shetland Livestock Marketing Group⁸⁸ (SLMG) is a farmer cooperative involving some 300 members. It operates a meat trading arm, Taste Shetland. SLMG was formed in 2003 after a restructuring of the agricultural industry in Shetland. It operates a fully accredited abattoir which conforms to ISO9001 specifications and is licensed to process organic products.

⁸⁸ See <http://www.tasteshetland.com/about.php>

Project Selkie

*The recommended brand strategy for Shetland
Report*

Prepared for

SIC and HIE

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1 Introduction

In March 2003 Corporate Edge was appointed to develop a brand strategy for Shetland by the Shetland Islands Council as a preface to the development of the brand itself.

The process adopted for this strategic stage consisted, in the first place, of wide consultation with key people in Shetland and the analysis of relevant data. The most influential document was the SIC Economic Forum 2012 document. We also drew heavily on the insights gained from and the extensive international research Corporate Edge has carried out on other location branding exercises; and on various academic papers. From this data a first hypothesis was developed and subjected to a 'stress-test' by the Steering Group, whose responses helped shape the final recommendations.

Four focus groups with Shetlanders were conducted towards the end of the project, for which specially designed creative material was developed. The two major topics covered were: attitudes to the notion of developing a Shetland brand; and reactions to the idea of establishing an overall quality mark for Shetland, with accompanying quality control mechanisms. The findings from these groups are referred to throughout this document but can be found in greater detail in a separate document 'Research with Shetlanders on branding Shetland' which also shows the creative materials used.

Note: This document should be read in conjunction with Powerpoint presentation of 29.5.03 which deals with the points summarised below in greater detail and which contains a list of the sources which helped form the recommendations.

2 Why brand Shetland?

The reasons for developing a brand for Shetland are very clearly laid out in the SIC Economic Forum 2012 document. They were also articulated forcibly not only by those interviewed and the Steering Group but also by the Shetlanders consulted in the research.

The two major reasons are: first, that Shetland needs to develop a new strategy to direct the economy in the wake of the oil boom as these revenues decline; and a brand was felt to be a prime tool for this initiative; and second, on a more emotional level there is strong feeling that Shetland needs to reclaim its brand. The 'Shetland knitwear' application, for instance, was never established as a protected appellation which could be used only on knitwear emanating from Shetland.

Further directives were: a need to justify the high margins imposed on all Shetland produce and products by the distance from key markets and the small scale of production, to increase repeat purchase, especially from those visiting the country, and thereby add more profitable revenue; to inspire higher quality delivery and added value; and to reposition Shetland as 21st century.

The task of the brand thus emerges very clearly. Overall it is to reinstate the Shetland brand for the 21st century. Externally it must persuade the world to buy what Shetland offers. And internally it must inspire the people of Shetland to unify behind that offer and deliver its promise.

3 The factors that shape the brand

Focus on exports and tourism

All the economic data indicate that the focus of the brand has to be exports and tourism, as these are Shetland's main revenue streams with a slightly greater emphasis on exports. Other studies have shown that money spent on promoting exports achieves a disproportionate impact on an economy. Promoting exports also helps build the right kind of image for tourism.

Concentration on the target market of 'successful idealists',

Shetland's distance and scale and the nature of what it offers rules out a mass market audience. The people who currently buy what it offers are at the top end of international societies: older, affluent but putting a value on values and liking 'rarity'. They prefer to visit a place which is not only different but also highly distinctive; and to buy produce and products from a culture whose values they admire. The ambition for Shetland is better to understand these people and thus deliver more fully; and thereby increase the repeat purchase rates which are currently unnecessarily low

Positioning as 'a small, clever country'

Shetland is in danger of being seen as a 'pre-modern society': simple, admirable but lost in a time warp. In line with the strategies adopted by Brittany and Ireland, Shetland needs to join the 21st century group of small countries which have achieved economic success by showing the world that they are highly focused and have sophisticated minds. Singapore and New Zealand are two shining examples of this.

A premium and quality offer

The impact of distance and scale has always meant that what Shetland sells is expensive. But the quality of what Shetland offers is thought to be high and this, plus relative inaccessibility, means the expense is thought to be justified by the target market; with the caveat that poor quality examples seriously undermine this belief. The narrow range of Shetland's products and produce indicates that the Shetland proposition needs to centre round Shetland as a special and specialised place, whether as a place to visit or a source of premium products.

Can Shetland deliver this quality promise?

The Steering Group and other key people interviewed expressed considerable anxiety about the ability and willingness of Shetlanders to deliver the quality promise. This was felt to stem partly from the 'feather bedding' of the oil boom years; partly from the Shetland mind-set which, it has been said, can interpret 'service' as 'servitude'. The clear directive for the

brand is that it should persuade and inspire the delivery of higher quality rather than dragoon or bully people to conform.

4 Finding the spirit of the brand

To be persuasive, a brand needs more than the bare bones of the strategic intent - it needs inspiration as well. And for it to be persuasive to Shetlanders it needs to reflect the islands' character in a way that is recognised and approved of by Shetlanders

Shetland's character is formed by the nature of its landscape. its people and its products and produce. The influence of each of these on each other produces the following three elements.

Soul

Shetland may be said to have 'soul'. The landscape has been formed by the people who, in turn, have been influenced by the land and sea environments. Shetland's built heritage is witness to the depth of its culture and the vitality of its music, for instance, is witness to its breadth. Vitality is also evident in the abundance of wildlife and the strength of community bonds. Shetland's past and present are thus integrated.

Origins

One of Shetland's characteristics which is highly attractive to the identified target market (see above) is that its characteristic products originate there; whether these be the produce of the sea and land or, in the case of knitwear, uniquely designed and crafted there. The magic of the unique landscape and the enduring vitality of the culture enhance this originating authenticity. Shetland's products and produce therefore carry the attractive aura of Shetland itself.

Fineness

This has a double derivation. First it comes from a set of admirable values which Shetlanders demonstrably share and enact (like trust and honesty); and second from the quality and type of products for which Shetland is known; epitomised by the subtlety of the renowned heirloom shawls, fine enough to pass through a wedding ring.

These aspects of the spirit of the brand were strongly endorsed by the focus groups which gives confidence that the brand, if it reflects these elements, will be resonant with Shetlanders and thus recommended as the 'brand essence' (see below).

5 The recommended Shetland brand template

Vision – what do we want to be? - self-reliant, successful Shetland

Self-reliance is innate in the Shetland attitude so this constitutes the heart of the ‘give Shetland back to Shetland’ ambition and is thus the antidote to the feather-bedding of the oil boom years.

Goal – how will we know if we have succeeded? – export + tourism goals achieved

These are the goals which the brand is designed to achieve and against which the brand should be measured. Quantitative goals ensure a brand is effective. Without them a brand lacks essential bone structure and is open to accusations of wasting time and money.

Philosophy – what will inspire us? – excellence

Shetlanders have demonstrated a philosophy of excellence in certain fields and, according to the focus groups, one to which people would like to return. This constitutes a call to action for quality delivery, but through voluntary agreement rather than externally imposed rules. It is essential if Shetland is to justify its necessarily high prices.

Positioning – where do we want to be ‘placed’? – a small, clever, specialised country

Shetland needs to avoid classification with struggling small communities who are ‘primary and peripheral’. To do this it is essential to demonstrate ‘cleverness’ i.e. proactive astuteness about what is offered and to whom. And to be focused. Shetland is a special and specialised country. Being focused and demonstrating single-mindedness can, like Singapore, achieve disproportionate impact.

Focal customer - Who do we focus on? – successful idealists

As described above, Shetland’s scale of production, the nature of what it offers and its distance dictates its target market must be one of quality not quantity. Shetland already attracts this target market but gets insufficient repeat purchase. It will be important to learn more about these international customers and to design the brand to speak their language.

Proposition – what’s our offer? – a rich, rare quality experience

This derives from what Shetland, at its best, already offers. It is what the target market seeks and what Shetlanders believe can be delivered. It applies equally to exports and tourism (including corporate tourism) and is capable of flexing to promote inward investment, sport, culture, education and special events.

6 The implications and recommendations

The brand template exactly fits the economic directives laid out in the Economic Forum 2012 document and, on direct evidence, suits the Shetland character and what it offers.

But there are three extremely important implications or caveats which need to be addressed if the brand is to achieve its objectives. Our recommendations show ways in which these issues can be managed to suit Shetland *and* achieve disproportionate impact i.e. help Shetland get more publicity for its brand than its promotional budget would normally allow

6.1 Brand personality and application

The brand template is true to Shetland but not yet unique to it, much of it being generic to other small, northern European communities, especially Orkney with whom Shetland shares many if not most of its cultural and product characteristics. This problem can be overcome if Shetland can lay faster, better and more dominant claim to the brand territory. It can establish its dominant claim by developing a fresh, new, distinctively Shetland visual style and by managing the application of the brand to advantage.

The brand, as expressed in a visual style, will need to be designed with two roles in mind. First, as a 'master brand' it must seek to be used as widely as possible, the ambition being eventually for the logo to be displayed on everything Shetland and influence a general Shetland visual style. As such it must be persuasively 'user-friendly' and compatible with other logos. Second, as a 'component brand' it must seek to be compatible with other overarching brands, yet be distinct enough to make its particular point.

In other words the brand template's structurally sound elements need careful and brilliant execution, plus excellent brand management systems, if the brand's potential is to be realised. High on the desirable brand management systems are the development of a 'style guide' to ensure the brand is always expressed correctly and the provision of a 'brand architecture' system to guide how the brand is used with other brands.

6.2 Quality delivery

The core issue for the brand.

The recommended role for the brand is that it should act as an inspirational and persuasive encouragement to Shetlanders to take an acute interest and pride in delivery quality. But it also needs mechanisms to be tough.

Thus we recommend that the Shetland logo should be a country-of-origin device which can only be used on products, produce or services which satisfy stringent quality standards.

The establishment of those standards will of course have to be set by each sector. We are aware that many sectors, particularly salmon, are already subjected to a range of externally imposed quality standards but if the Shetland brand is to assert itself as the master brand it must be master of what quality means.

New Zealand's pioneering of what a country of origin device can do to raise quality levels shows the way. The device is not open to all but must be applied for and it can be taken away if quality levels drop. Products or services which flourished the device were found to be successful in overseas markets so others increasingly applied. In other words the strategy worked by becoming desirable rather than being dictated. And unsanctioned usage, at home or abroad, was immediately denounced – which produced the added bonus of free publicity which considerably accelerated the quality claim of the brand.

Beyond standing for quality, as in the New Zealand example. we recommend that the device should also seek to emulate the Spanish model and engage the target market with a bold statement about 21st century Shetland. The now well-known España logo told the world, in one glance, that Spain was no longer solely interested in the cheap and cheerful end of the market but increasingly wanted the sophisticated top end customer. Shetland needs to show its target market that it may be small but it is also clever. There is no more instant and dramatic way to declare this than through the logo design values. This is another demonstration of disproportionate impact and. given the Spanish evidence, an equally instant way of telling Shetlanders that 21st century Shetland is about to make its mark.

6.3 Shetland commitment

Shetland is too small to allow for anything other than wholesale commitment to what the brand stands for and whole-hearted participation in its delivery.

This means not only the public sector which has initiated the branding process, but the private sector and the population as well showing a united front.

The brand template has been developed with this in mind. It has linked the economic objectives with the Shetland mind set. As such it should be not only intelligible but also persuasive to everyone in the islands. We have seen from the response to the initial creative work that both the ambition and the spirit of the brand make logical and emotional sense to people. How this can be achieved is described in the next section (A road show for Shetland).

7 The recommended brand realisation mechanisms for Shetland

The three key mechanisms strongly recommended to Shetland are: a road show to communicate the brand to all Shetland; the establishment of a brand task force to develop, monitor and promote the brand internally and externally; and aligning the Shetland portal to reflect the brand to the outside world.

7.1 A road show for Shetland

As yet the brand as it might be has only reached a minority of Shetlanders. But when the brand in its visual manifestation is created we recommend that a road show be developed which takes the brand out to the whole population of Shetland; and that the heart of this show comprises a short film which explores and vividly expresses what the brand means; engages the interest of those who see it and inspires them to adopt the brand's principles. This film should be an integral part of the development of the brand personality (see above) and should be modelled on how commercial organisations now seek to communicate a corporate brand to their staff.

Shetland may also wish to consider developing the Shetland equivalent of the New Zealand Way — a sort of 'how we do things now' credo about Shetland's quality platform and how the promise can be kept.

7.2 Establishing a brand task force

The brand task force is there to act as brand guardian and brand monitor. As the adoption of the brand increases, especially by the private sector, it will need dedicated and empowered personnel. This is the body which will own and direct the visual style and application of the brand and be expert in the use of the style guide. As such, marketing will be the key skill, but it is also recommended that the team be headed by a chairman who can fulfil a 'brand ambassador' role and a chief executive with as much overseas experience as possible. Both these roles will be key drivers for the export focus of the brand and to utilise the 'ex-pat' Shetlanders' wish to help promote Shetland overseas.

The brand task force will also constitute the quality control body. This will entail determining what quality means and deciding where the country of origin device can be awarded. (It is worth noting that in the early days of the Scotland Brand device many of those approached to carry the device were reluctant because these quality controls had not been established.) Advantage can be taken of the many existing QC standards in many sectors. The brand task force will not have to invent QC standards, though it should have a clear, declared policy as to what quality means overall

7.3 The Shetland Gateway

The Shetland portal, the gateway, constitutes the no 1 promotional tool for the brand because it is how customers will frequently first encounter Shetland (and the target market is e-literate) and because it is wholly in the brand task force's control. It must thus immediately communicate Shetland's positioning as a small *clever* country and its proposition of a rich, rare *quality* experience. The developed brand personality and the ensuing style guide will dictate much of how this is managed visually and verbally; but 'cleverness' and 'quality' will need to be demonstrated by excellent site management. Existing portals for Canada and Iceland represent good best practice models for Shetland.

7.4 Shetland 'icons' and experiences

Beyond these three essential mechanisms there is also the desirability of establishing and using Shetland 'icons' to work for the brand. The old icons of knitting and fishing will not be enough to establish Shetland as 21st century and while Jarlshof is an icon for Shetland's ancient past it is not enough to demonstrate Shetland's living vitality. Two initiatives are under way which will start to embody this: the development of the new Shetland Amenity Trust museum and the proposed development of a Shetland 'experience' at Sumburgh airport.

These two have the potential to deliver intensified versions of the Shetland experience and thus endorse a key element of the proposition. The airport initiative emerges as a significant factor in increasing repeat purchase (and promoting of Shetland products and produce). And the museum should be a really important mechanism for outsiders to access the 'magic' which has drawn them to Shetland and for Shetlanders to take increased pride in themselves. Through what is shown and how it is shown, these two initiatives can deliver the brand's ambition to embody a 21st century brand for Shetland.

8 End note

In the end a brand like Shetland's will be as much deduced as declared – if not more so. That is, customers will learn more from what they experience than what is officially expressed. This is desirable because what people deduce for themselves is far stronger than what is messaged 'at' them and this is particularly true of the target market of successful idealists. It is even more desirable if Shetland wants to pull off the ambition to achieve disproportionate impact, which can be summarised as thinking cleverly rather than spending money.

All the evidence from Project Selkie strongly suggests that Shetland has the reputation and the mind set to deliver the brand promise. Shetland may be currently preoccupied with anxieties about quality delivery, but quality is what Shetland is already associated with and Shetland opinion, as ascertained, shows interest in lifting the standard. So it is not the 'what' that is key to the brand's effectiveness but the 'how'. The brand template so far has been well received, as has the initial creative thinking round the brand essence. The key to full delivery is how it is executed in design terms and how the people of Shetland can be inspired to deliver the brand in full.

Marketing Shetland: Our Vision

Our vision is that by 2020, through the work of Promote Shetland and its partners:

- Shetland's name will be recognised by potential customers, visitors, students and residents and will inspire positive feelings of admiration or curiosity;
- It will be easy for people outside Shetland to find out all that they need to know about the place, the people, the products and the opportunities;
- Those who come to Shetland will have access to information about the islands that is easy to find, easy to use and helps them get the very best out of their visit;
- All who live in Shetland will understand how Shetland presents itself to its principal customers and there will be widespread support in the Shetland community for promotional activities;
- Businesses, local government, local agencies and the voluntary sector will recognise that partnership is the best way to make progress in promoting Shetland;
- The community and, in particular, businesses will understand the market and will focus on high-quality products and services relevant to the needs of Shetland's customers;
- All those involved in presenting Shetland to customers will have a good understanding of promotional techniques and easy access to any further advice and mentoring that they may require;
- Shetland's customers will be cared for in a confident, friendly and helpful manner and any suggestions or criticisms will be seen as opportunities for further improvement; and
- Objective external review and benchmarking against competitor areas will offer continuous assessment of progress and help identify opportunities for improvement.

The Shetland Marketing Strategy

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