FINAL DRAFT

SHETLAND VISITOR SURVEY

2005/2006

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December 2006

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SHETLAND VISITOR SURVEY 2006 EXECUTIVE SUMMARY

Total Visitors to Shetland 2006	**104,241**
Total Air and Sea Travellers	59,924
➢ Total Holiday Travellers	24,744
➢ Total Business Travellers	22,099
➢ Total VFR Travellers	13,081
Total Cruise Passengers and Crew	43,035
Total Yacht Travellers	1,292
Direct Spend of Visitors to Shetland 2006	**£16.43m**
Direct Spend Air and Sea Travellers	£15.3m
➢ Direct Spend Holiday Travellers	£7.3m
➢ Direct Spend Business Travellers	£5.4m
➢ Direct VFR and Sea Travellers	£2.6m
Direct Spend Cruise Passengers and Crew	£1.0m
Direct Spend Yacht Travellers	£163,000

Summary Results			
SURVEY	Air & Sea	Cruise	Yacht
- Expenditure	£	£	£
Accommodation	87		
Travel Costs On The Islands	33		
Food And Drink	53	1.32	137
Package Trips/Tours Local	36	14.00	
Tourist Shopping	23	6.44	36
Entertainment	8	4.67	23
Other Shopping	12	2.12	30
Miscellaneous Items	2	0.38	141
Total Spend In Shetland	**255**	**28.93**	**366**
Travel To Shetland	189		
Package Trips/Tours Non Local	36		
Total Overall Spend	**480**		
- Transport to Shetland	%	%	%
Northlink	46		
Sumburgh	48		
Smyril	6		
- Trip Purpose	%	%	%
Holiday	40	59	100
Business	35	41	0
VFR	21	0	0
Other	4	0	0
- Social Group	%	%	%
AB	27	8	17
C1	41	12	39
C2	21	5	4
DE	7	1	0
Retired/No Response	4	75	39

SURVEY	Air & Sea	Cruise	Yacht
- Party Type	%	%	%
Individual	47	9	30
Couple	25	68	30
Family	6	8	9
Friends	9	11	30
Organised Group/Tour	4		
Business/Work Colleagues	9		
Other	0	3	0
- Average Party Size	1.85	2.33	2.48
- Gender	%	%	%
Male	58	47	75
Female	42	53	25
- Age	%	%	%
Under 24	13	3	6
25-55	52	18	33
Over 55	35	79	61
- Origin	%	%	%
Scotland	44	1	43
Rest of UK	32	17	30
Overseas	24	82	27
- First Time/Repeat Visitor	%	%	%
First Time	51	93	48
Repeat	49	7	52
-Main/Second Holiday	%	%	%
Main	44	21	61
Second	56	74	30
- Average Nights Away	14.5		56.1
- Average Nights Shetland	5.8		8.0
- Main Accommodation	%	%	%
Hotel/Guest House/B&B	50		0
Self Catering	7		0
Hostel/Bod/Camp	10		0
VFR/Own Property	19		0
Yacht/Boat	>1		100
Other	4		0
Internet Usage	48	23	39
- Expectations	%	%	%
Exceeded	42	50	48
Met	55	37	52
Not Met	1	1	0
- Recommend	%	%	%
Yes	91	79	70
No	8	11	0
- Return	%	%	%
Yes		55	92
No		15	4

AIM AND OBJECTIVES

The aim of this study is to provide detailed visitor information with which to guide future tourism policy in Shetland. The main objectives are to provide an accurate estimate of volume and expenditure of visitors during 2005/2006; supply information about visitor profiles and their visit in order to guide future tourism policy; highlight principal drivers relating to Shetland as a destination of choice; provide information on the quality of the visitor experience; identify service and product gaps relating to Shetland tourism; provide results which allow comparison of key indices with previous reports.

VOLUME AND VALUE OF TOURISM

The total estimated number of visitors to Shetland was 104,241 made up of 59,924 air and sea travellers, 43,035 cruise ship passengers and crew and 1,282 yacht travellers. The total direct spend of these visitors in Shetland is estimated at £16.4m, made up of £15.3m from air and sea travellers, £1m from cruise ship passengers and crew and £163,000 from yacht travellers. In terms of spend by group holiday makers spent most at £7.3m representing 44% of all money spent, followed by business travellers at £5.4m or 33%, this shows a change from 2000, when business travellers made up the greatest proportion of total spend at 45%. Overall these figures show an increase of 37,767 visitors or 57%, with an increased spend of £4.5m or 38%, overall average spend per visitor per trip has fallen by £22 to £158, a decrease of 13%. The main reason for increased visitor numbers has been a more than doubling of cruise ship passengers and crew, although there has been a rise in visitors in all categories. The main reason for the decrease in average spend per trip, is a decrease of a night in length of stay for air and sea visitors, coupled with a proportionate increase in cruise travellers.

AIR & SEA TRAVELLERS

Trip Purpose

The main purpose of trip over the period was holiday visits at 40%, however during the low season there was proportionately more business than holiday travel. Over the year there was 35% business travel, including 3% combining holiday and business, 21%VFR with 19% on holiday and 2% visiting friends and relatives for other reasons. 4% gave other reasons for visiting. During the peak Summer season holiday travel rose to 46%, business fell to 26% and VFR remained static at 21%. 5% gave other reasons. The proportionate change since 2000, shows an increase in holiday travel in the low season period, which could indicate a development of the shoulder season. Possibly the most notable change since 2000 however is that overall holiday travel in 2006 exceeded business travel.

Visitor Profile by Trip Purpose

	Holiday		Business		VFR	
Gender	Female	53%	Male	80%	Female	62%
Age	Over 55	47%	25-55	78%	Over 55	46%
Social Class	C1	44%	C1	36%	C1	43%
Mode of Travel	Sea	77%	Air	73%	Air	59%
Season Visit	High	66%	High	50%	High	59%
Accommodation	Hotel	42%	Hotel	48%	VFR	72%
First/Repeat Visit	First Time	81%	Repeat	68%	Repeat	75%
Length of Stay	1-7 nights	79%	1-3 nights	57%	4+ Nights	79%
Most Frequent 1 Night Stay	Lerwick	66%	Lerwick	67%	Lerwick	44%
Origin	UK	58%	Scotland	71%	UK	88%

Main or Second Holiday

Holiday visitors and those VFR on holiday were asked if their visit to Shetland was their main or a second holiday for the year. Overall 56% were on a second holiday. This compares to 41% second holidays in 2000 and would appear to show a trend toward second holiday travel to the islands.

Social Group

As with other parts of the Highlands and Islands visitors to Shetland tend to be from higher social groups, with 69% from the ABC1 groups.

Party Type

Individual travel forms the largest proportion of respondent travel in Shetland at 47% although this has decreased from 52% since 2000. Couples are the most common party type to Orkney and the Western Isles, and although proportionate couple travel to Shetland has risen by 5% since 2000 to 25% it is still significantly lower than the other two island groups. This may reflect heightened proportionate levels of individual business travel to Shetland. Family parties to Shetland have declined proportionately since 2000 down from 12% to 6%, and are significantly lower than both Orkney and the Western Isles. Travel with friends has increased slightly to 9%, but is still lower than for the other two areas. Organised tours although proportionately quite low at 4% have risen by 2% since 2000, and would appear to be proportionately similar to Orkney, but lower than the Western Isles. Travel with work colleagues at 9% is significantly higher in Shetland, and again this highlights proportionately higher levels of business travel to the islands.

Party Size

Overall average party size has remained relatively stable from 2000 rising slightly from 1.82 to 1.85. Party size by purpose of trip has fallen particularly for holiday travellers, which has reduced from 2.39 to 2.12. Average party size during the low season has risen from 1.60 to 1.82, but has fallen quite significantly during the high season from 2.34 to 1.87. Average party size for Shetland travellers is lower than Orkney and the Western Isles, again this may be due to higher proportions of individual and business travel.

Gender and Age

Overall 58% of visitors were male and 42% female, and 13% were aged under 24, 65% 25-55 and 30% over 55. In general females were older than males.

Origin

There has been a slight proportionate decrease in the levels of UK visitors to the islands since 2000 down 3% to 76% and a slight increase in overseas visitors up 3% to 24%. The most significant market remains Scotland at 44%. For both high and low season and by purpose of trip, visitors predominantly come from the UK, and other than holiday visitors were predominantly Scottish. Total UK visitors vary from 92% for business travellers to 58% for holiday makers. 14% of visitors were European varying from 24% of holiday makers to 6% of business travellers. 10% of visitors were Non-European varying from 18% of holiday makers to 2% of business travellers.

Previous Visits

51% of respondents were on their first visit to Shetland. A sizeable percentage 13% had been more than 10 times, and 7% had previously lived in the islands. The most significant proportionate changes since 2000 were a rise in first time visitors, who now form more than half of all visitors, and a fall in those who have visited more than 10 times.

Arrival and Exit Points

In the main visitors enter and exit via the same route. Although there are exceptions e.g. Smyril passengers using Shetland as a stepping stone to the Mainland UK, and air travellers using Northlink due to fog at Sumburgh. The most significant route overall is Northlink Aberdeen with 36% of visitors. The most significant air route is Sumburgh Aberdeen with 21%.

Length of Stay and Areas Visited Within Shetland

On average visitors spent 14.5 nights away from home during their trip, and 5.8 nights in Shetland. This shows a rise of 1.5 nights away from home per trip, and a fall of 1 night in Shetland since 2000. The most frequent number of nights away in total was 4-7 at 30%, with 1-3 nights spent in Shetland 42%. 73% of visitors spent between 1 and 7 nights in the islands, with 8% not staying a night at all. Lerwick has a much higher average stay than any other area of Shetland at 2.51 nights. The area coming second was the South Mainland at 0.84 nights. Average figures in the main were lower for Non-Mainland than Mainland areas. Overall average stay figures have fallen by 1 night since 2000. They have also fallen in eight of the fourteen areas identified within Shetland, with two areas remaining the same. Overall and when viewed in conjunction with increased visitor numbers, and the trend toward Shetland as a second holiday area, this might suggest that visitors in general are making more trips (not necessarily all to Shetland), but these trips are of a shorter duration. Overall the most frequent number of areas visited was 4-5 at 37% with 67% visiting between 1 and 5 areas. Scottish and business visitors visit less areas within the islands than other visitors. 42% of holiday travellers visited 6-10 areas. Overall visitors visited an average of 4.5 areas, a rise of 0.3 since 2000.

Expenditure

Overall there has been a fall in the total spend of visitors both on and off the islands down from £488 in 2000 to £480 in 2006, a fall of £8. This is entirely due to falls in travel costs to, from and on the islands, predominantly to and from. This may reflect both improved travel offers from transport providers particularly for sea travel from Mainland Scotland that has seen the most significant increase in passenger numbers. It is also possible that travellers are now more likely to seek out better deals, particularly given the rise in second holidays. Overall there has been a rise in the total spend of visitors whilst on the islands up from £245 in 2000 to £255 in 2006, a rise of £10. This may not seem a significant amount given the time span between the two surveys however it should be remembered that average trip length has fallen by 1 night and if these figures are examined as a nightly/daily spend the average has increased from £36 per night to £44 per night, a rise of £8 or 22%.

Accommodation

The top 3 most frequently used accommodation types for 2000 and 2006 both in the main and overall remain the same being hotels, VFR and B&B. There has been a proportionate drop of 6.2% in main hotel usage to 28.9%, a drop of 2.3% in VFR to 18.7% and a rise of 1.7% in B&B usage to 12.1%. It should be noted however that as overall visitor numbers have risen this does not directly translate to a drop/rise in the number of visitor using these types of accommodation. In addition 8.1% used self-catering/own property as their main accommodation, 6.3% hostels and bods, 4.4% campsites/camper vans and 4.1% other types of accommodation. 53% of visitors booked all their accommodation prior to arrival. 31% stated this was not applicable and this includes those with their own property, VFR and day trippers. Those who booked represented from 85% for hotels, guest houses and self-catering to 53% for hostels and bods. 53% of campers did not book.

How Accommodation was Booking

In the main, accommodation was booked either direct with the provider, or by someone else. When examined by main accommodation, booking patterns differed according to accommodation type with B&B bod, hostel and self-catering visitors more likely to book direct with the provider, while hotel and guest house visitors more likely to have their accommodation booked by someone else, and campers are most likely not to book. The survey also asked for internet booking information. Overall 9% of travellers booked accommodation through the internet.

Sources of Information/Inspiration

The most frequently used information source overall was the internet, with 48% stating they had used it to find out about Shetland prior to visiting. The next two most frequent were none as someone else organised the trip and friends and relatives at 26% and 24% respectively. Holiday makers most frequently used the internet 65%. This analysis shows that although the levels of travellers booking accommodation on-line were relatively low at 9% the majority of travellers use the internet to research the islands prior to visiting, including business and VFR travellers where although other information sources were proportionately higher, over 1 in 3 used the internet. It also shows a significant rise in internet research since 2000 when only 6% of visitors used the internet for research. There would also appear to be an overall general increase in research prior to visit since 2000, as usage of all the information options provided rose apart from the TIC, although this might reflect more hands on research being undertaken by travellers themselves. Those who stated they had used the internet in planning their visit were asked for details in relation to areas researched and booked. The most frequently researched and booked aspects of the trip was transport to with over 1 in 3 researching on line and around 1 in 4 booking. Accommodation ranked second with around 1 in 4 researching and 1 in 10 booking. The only other area booked on-line was transport on Shetland. The most frequently researched areas among the other options given were history, culture, nature, visitor centres and attractions.

Inspiration to Visit

Overall and for both Scottish and other UK visitors the main inspiration to visit was work and VFR. Around 1 in 3 travellers stated this overall, and over 1 in 2 Scots visitors. The most important market segment to assess in terms of inspiration to visit is the holiday market. Overall their main inspiration to visit were birds, wildlife, nature and flora, followed by peace and quiet, remoteness and the scenery.

Marketing Influences to Visit

Other options to those provided within the questionnaire ranked highest with the most frequently stated being work at 24%, the second and third ranking influences were advice from friends and relatives at 19% and experience of previous visits at 14%. Again the most important market segment to assess is the holiday market, which mirrored the overall results. What is interesting to note is that direct promotional materials ranked well below word of mouth and previous experience, although overall and combined promotional materials were mentioned by 27% of respondents, and 47% of holiday respondents. In terms of direct marketing to first time visitors it would appear that the internet and guide books are slightly more effective than other options suggested.

Activities

54% of respondents stated that they had no main activity whilst in the islands, however only 16% stated they had not participated in any activities. The most frequently mentioned main activities were general sightseeing, walking and bird watching, and the most frequently participated in were short walks, beaches and scenery, general sightseeing, bird watching, historic and archaeological sites and painting and photography. 1 in 5 visitors participated in 1 or 2 activities, with 14% participating in more than 10 activities.

Potential Improvements

In terms of improvements to visit, overall 44% stated that they could not think of anything, or that no improvement was required. Just over 1 in 10 stated less expensive travel, and just over 1 in 20 improvements to public transport and eateries. In terms of activities 78% stated that they could not think of anything, or no additional activities were required. 3% mentioned a cinema, and 4% walking and eating provision improvements.

Meeting Expectations

Overall 55% of respondents felt their expectations had been met, and 42% that they had been exceeded. There were extremely low levels stating that their expectations had not been met, 1% overall. This ranged from 3% for overseas and holiday visitors to 0% for Scottish, business and VFR visitors. It is worth noting however that although levels were low, holiday makers were those who stated expectations had not been met. Compared to 2000 there are now 7% more travellers stating that their expectations had been exceeded. However there has been a rise of 2% for holiday makers, whose expectations were not met. When asked what fell shortest of their expectations, overall 79% stated that they could not think of anything. 4% mentioned transport, and 3% eating, weather and accommodation.

Highlight of Visit

Overall 14% stated the scenery was the highlight of their visit, 7% that they could not think of anything, 7% the people, 6% animals other than birds (4% stated birds) and 6% seeing friends and relatives. Overall the area of Shetland most stated was Sumburgh head.

Recommend Shetland

An overwhelming majority 91%, would recommend Shetland to others. It should be noted however that 8% overall would not recommend the islands, varying from 4% for holiday visitors to 14% for business visitors.

Opinions of Tourism Aspects Overall

The top 3 average rated aspects of Shetland tourism were archaeological sites, the quality of local food and the TIC; and the lowest things to do on wet days, shops and quality of other (non-local) souvenir products. Average scores were all above 3 showing that even those ranked lowest were on average rated as OK. Those which were most frequently stated to be poor or very poor were things to do on wet days at 10%, and eating out, availability of local food and transport to Shetland all at 6%.

Suggested Areas for Improvement

In relation to eating out the most frequently stated areas for improvement were in relation to menus, food quality and numbers of eating establishments. This was the area where most comments were made (17% of respondents). In relation to local food products the most frequently stated were in relation to lack of availability both overall and more specifically fish and at local eateries. There was also felt to be a lack of promotion. In relation to accommodation the most frequently stated were in relation to refurbishment, expense and hygiene. In relation to local arts and crafts the most frequently stated were in relation to availability, marketing and limited range. In relation to local information the most frequently stated were in relation to lack of information, timetabling issues, and more detailed maps. In relation to other areas the most frequently stated were in relation signage and walking.

CRUISE TRAVELLERS

Social Group

Three quarters of respondents were either retired, or did not specify an occupation. Orkney had proportionately more AB's and Shetland more C's.

Party Type, Party Size, Gender and Age

Couple travel accounted for 68% of cruise travel, with friends and family being the next highest at 14% each and individuals at 4%. Overall average party size was 2.33 people. 47% were male and 53% female. 79% were aged over 55, with extremely few under 24 at 3%.

Origin, First/Repeat Visits and Main/Second Holiday

There were 18% UK travellers, 34% European and 48% from the rest of the world. These figures are for respondents only. An overwhelming 93% of respondents were first time visitors, with 74% on a second holiday.

Importance of Shetland on Cruise Itinerary

The most frequent response was that Shetland was quite important in influencing their cruise choice at 46%. There were significantly more respondents stating that it was very important in 2006 than 1999, 43% as opposed to 31%, with only 8% stated that it was not important in 2006 as opposed to 22% in 1999. Therefore it would appear that there may have been an increase in the importance of Shetland as a cruise destination for passengers.

Problems Obtaining Sterling

78% of respondents stated that they did not have any problems obtaining sterling. 3% stated problems on the boat and 2% onshore. There would appear to be a slight drop in the level of passengers having exchange difficulties since 1999, falling from 8% to 6%.

Onshore Travel

90% of respondents stated that they had travelled on a bus tour, including 12% who had travelled both on a tour and independently, figures for 1999 were 86% and 14% respectively. It is possible that this is an overestimate as bus tours were targeted within both surveys in order to obtain more returns, however it is apparent that a very high percentage of cruise ship visitors undertake bus tour travel. Within the Orkney survey bus tour participation was stated as 86%, but again this figure may have been heightened due to significant bus tour sampling.

Areas Visited

98% of respondents stated they had visited Lerwick, when the 2% no responses are included this represents all visitors, which is what would be expected as all interviews were undertaken with cruise ship travellers berthing in Lerwick. Jarlsoff, Scalloway and Mousa also featured highly as places visited, which again is unsurprising as this is where bus tours tend to go.

Expenditure

Overall average spend is estimated at £28.93, with the highest proportions spent on tours, tourism shopping and entertainment and recreation. Figures show a slight decrease in terms of overall spend compared to the 1999 survey and a significant decrease in terms of tourism shopping. It is also significantly lower than overall Orkney estimated spend figures, mainly in terms of tour and tourism shopping expenditure. The 2006 survey gave what initially appear to be some somewhat surprising results when compared to the 1999 survey and the Orkney one. However on closer examination a number of issues were highlighted in terms of survey techniques, nationality, vessel size, opportunity to shop and return rates.

Sources of Information/Inspiration, Port Lecture

The most frequently used information source overall was the cruise line at 72%, the next most frequent was the internet, at 23%. 68% respondents felt that they had received adequate information at the port lecture, 63% felt that the information was accurate.

Opinions of Tourism Aspects

The top 3 ranked tourism aspects were archaeological sites, transport in Shetland and the TIC, and the lowest musical and cultural entertainment, and availability and quality of locally produced food. Average scores were all above 3 showing that even those ranked lowest were on average rated as OK. Those which were stated to be poor by 1% of respondents in all instances were museums and heritage centres, shops, musical and cultural entertainment, and availability of locally produced food. No aspects gained a very poor rating.

Potential Improvements to Visit

Overall 78% stated that they could not think of anything, or stated no improvement was required. 13% stated more time.

Meeting Expectations, Highlight of Visit

50% of respondents felt their expectations had been exceeded and 37% that they had been met, with only 1% stating they had not been met. This is more or less identical to the results obtained from the Orkney survey, where 49% felt there expectation had been exceeded and 37% that they had been met. 85% stated that they could not think of anything area falling short of expectations. 6% mentioned lack of time and 4% weather. 46% stated they could not think of a highlight, 17% stated the scenery, and 13% the tour or tour guide.

Recommend/Return to Shetland

80% would recommend Shetland as a holiday destination for friends and family. 55% stated that they would like to return to Shetland, with only 15% stating they would not.

YACHT TRAVELLERS

Social Group

It would appear that there has been a proportionate increase in C1's since 2000. There would also appear to have been a significant fall in AB's, however the majority of respondents stated they were retired without providing a previous occupation and are therefore recorded as retired/no response.

Party Type, Party Size, Gender and Age

Travel with friends accounts for 47%, with couple travel being the next highest at 25%. Overall average party size was 2.48 people. Compared to the 2000 survey, average party size has fallen from 3.2 people a drop of -0.72. There were 75% males and 25% females. In 1999 these figures were 69% male and 31% respectively. This shows the predominance of male travel on yachts. 61% were aged over 55. There were also extremely few 24 and unders at only 6%.

Origin

The largest proportion of travellers were from Scotland at 43%, followed by England at 30% and overseas 27%. In 2000 68% of respondents were from overseas, this may show a differing pattern of nationality visiting varying ports, as more Scalloway based interviews were conducted in 2006, as opposed to solely Lerwick based in 2000.

Previous Visits, Main/Second Holiday, Importance of Shetland

48% of respondents in 2006 and 42% in 2000 were first time visitors. 61% were on their main holiday for the year. 61% also felt that Shetland was very important on their trip itinerary.

Ports of Call

48% of respondents had come from Orkney, and 13% from Norway. The next port of call was most frequently stated as Aberdeen at 26%, followed by the rest of Scotland and Norway both at 13%. This data would tend to show the major flows of yacht traffic both to and from Orkney and Mainland Scotland. Mainland locations within Shetland tended to be the most visited in 2006, with 87% of respondents stated they had visited Lerwick. In 2000 Mainland areas also featured highly, however there was a much more Lerwick focused travel pattern with 100% having visited Lerwick, and the next highest being 45% for Fair Isle. These differing patterns may be influenced by the differing survey locations.

Nights Away

Visitors on average spent 56.1 nights away from home during their trip, and 8 nights in Shetland. This shows a fall of 54.9 nights away from home per trip, and a rise of 1.7 nights in Shetland since 2000.

Expenditure

Overall average spend is estimated at £366 per yacht, with the highest proportions spent on food and drink and miscellaneous purchases. Figures show a decrease of £41 in terms of overall spend compared to the 2000 survey.

Sources of Information/Inspiration/Feedback & Satisfaction

The most frequently used information sources were the internet and tourist brochures/leaflets both at 23%. The top 3 ranked tourism aspects were archaeological sites, quality of local food and the TIC, and the lowest things to do on wet days, quality of non-local souvenirs and eating out. Average scores were all above 3 showing that even those ranked lowest were on average rated as OK. The only aspect stated to be very poor by 4% of respondents was musical and cultural entertainment.

Potential Improvements to Visit

57% stated that they could not think of anything, or stated no improvement was required. 17% stated improvements to pier and pier services, and 13% improvements to internal transport.

Meeting Expectations, Highlight of Visit

48% of respondents felt their expectations had been exceeded and 52% that they had been met. The figures for 2000 were 68% and 26% respectively, which would tend to suggest a rise in satisfaction levels among yacht travellers. 71% stated that they could not think of anything, falling short of expectation. 13% mentioned eating out. Overall 22% stated the people as the highlight of their visit, 17% stated sailing routes, and 13% scenery.

Recommend/Return to Shetland

70%, would recommend Shetland to friends and family. No respondents said they would not. An overwhelming majority of 92%, would make a return visit.

1. INTRODUCTION

1.1 Terms of Reference

The three main organisations responsible for promoting tourism in Shetland, i.e. Shetland Islands Council, Visit Shetland and Shetland Enterprise, commissioned this survey of visitors to be carried out during 2005/2006 in order to gather a range of data and provide an update of the previous surveys carried out in 1991, 1995, and 2000. In addition a joint need has been identified to gather information from tourists visiting Shetland in order to inform future tourism policy. The visitor survey and the report of its findings have been carried out by AB Associates in conjunction with Macpherson Research.

The aim and broad objectives of the study are:-

Aim : to provide detailed visitor information with which to guide future tourism policy in Shetland

Objectives :

(a) Provide an accurate estimate of volume and expenditure of visitors during 2005/2006.
(b) Supply information about visitor profiles and their visit in order to guide future tourism policy.
(c) Highlight principal drivers relating to Shetland as a destination of choice
(d) Provide information on the quality of the visitor experience.
(e) Identify service and product gaps relating to Shetland tourism
(f) Provide results which allow comparison of key indices with previous reports

2. METHODOLOGY

2.1 General Approach

The brief for the study identified the subject areas to be included in the analysis in order to achieve the study objectives. It also clearly stated the necessity to compare the results of this survey with the one carried out in 2000. As a result, the methodology used took both these factors into account. Thus the methodology used was similar to that adopted for the 2000 survey with some modifications, alterations or improvements where considered necessary, especially to take account of changed circumstances and the wishes of the client. This included the inclusion of data in relation to internet usage. The various aspects of the methodology are detailed below.

2.2 Desk Based Research and Benchmarking

Desk based research was carried out to investigate other relevant reports and surveys that might inform the data collection and methodology, and provide comparative benchmark data.

These included Shetland based reports such as the Shetland Visitor Surveys 2000, 1995 and 1991, Cruise Ship Survey 1999, Smyril Line Impact Study 2005, Shetland Brand reports, Shetland Tourism Products Study and the Economic Impact of Tourism/Tourism Satellite Account for Shetland currently being undertaken by A B Associates for Shetland Development Trust.

Other similar surveys were also consulted such as Orkney Visitor Survey 2004, Western Isles Visitor Survey, Jersey Visitor Survey 2004, Tasmania Visitor Survey 2003, Malta Visitor Survey 2004, as well as Highlands and Islands and Scottish level surveys, both for benchmarking purposes as well as survey methodology.

Data was also gathered from the transport operators to help with the analysis, particularly calibration, as well as information from Visit Shetland and the main tourist attractions.

2.3 Survey Design and Implementation

The survey of visitors made use of several different methodologies in order to achieve reliable statistics and outputs that will have a high degree of confidence. These included face-to-face exit surveys, self-completion questionnaires, postal questionnaires and calibration interviews.

2.3.1 Main Exit Survey

The traditional and probably the most effective means of getting useful information from visitors is by way of an exit survey of visitors using face to face interviews just before they leave the islands, i.e. at the departure points at the ferry terminal and airport. This was done by undertaking 1248 face to face interviews with a random sample of visitors as they left via Lerwick Harbour on North Link Ferries and the Smyril Line and via Sumburgh Airport on Loganair and Atlantic Airways. Interviewing at Smyril was undertaken by a graduate placement working for the Shetland Development Trust.

A questionnaire was drawn up which was generally based on the 2000 survey. However it was necessary to make adjustments in the light of the quality of responses to certain questions in 2000 and changes in the product. This included revision in relation to nights away from home to simplify the questions, the inclusion of question in relation to internet usage, increased focus on local food and crafts, and revision of the questionnaire wording where required. A copy of the questionnaire used in attached in Appendix 1. The inclusion of Colin Macpherson on the study team ensured both continuity and comparability between the two surveys, as well as allowing insight into the lessons learnt from the 2000 survey both in terms of the positive and negative aspects of the survey techniques employed, and questionnaire format. Additional face-to-face interviews were also carried out with cruise ship passengers and yacht travellers. Copies of the questionnaire used for these interviews are also contained in Appendix 1.

2.3.2 Self Completion Survey

The face-to-face interviews carried out for the yacht and cruise ship surveys were supplemented by the use of self-completion questionnaires distributed to cruise ship passengers and yacht visitors. This type of survey is used in many tourist surveys but can introduce a bias in the sample and skew the results if not handled carefully, therefore a face-to-face control sample was also interviewed. Tour guides on selected bus tours distributed self-completion questionnaires. Self-completion questions were distributed for yacht travellers in both Lerwick and Scalloway, however a very poor return rate was achieved, and a follow-up postal survey was conducted with travellers that had visited Scalloway. A B Associates has previous experience of conducted similar surveys with cruise ships visiting Lerwick, and have very successful in gaining an extremely high rate of return, and considerable quantities of data employing the same methodology. The inclusion of Alice Mathewson on the study team helped ensure both continuity and comparability between the visitor survey and the previous cruise ship study, and allowed insight into the lessons learnt from the previous survey.

2.3.3 Calibration Exercise

In an effort to reduce surveying costs, it was initially envisaged that calibration would be undertaken by transport operators. This however did not occur and Visit Shetland successfully undertook calibration for a period off-season in Sumburgh, however as the season progressed they were unable to continue due to other staff commitments. Self-completion calibration was attempted at Northlink, but this was not a success. At a quite advanced period through the project additional funding was made available and AB Associates undertook calibration at both Sumburgh and Northlink for the remainder of the survey.

Calibration was undertaken by interviewing passengers while queuing to check in or in car lanes at Northlink, and whilst entering security at Sumburgh. Copies of calibration questionnaires and sheet used are also contained in Appendix 1.

2.3.4 Interview Procedure and Schedule

Interviews were carried out at the exit locations from Shetland as follows :-

(a) Airport: On the days chosen for interviewing most, if not all, flights were surveyed in order to reduce any particular bias. The interviewers randomly select passengers for interview after they had checked in and before they went through security. If a passenger was travelling in a group then a random method was used to identify which member of the group was interviewed though on occasion some interviews were conducted jointly.

The choice of days was also critical as there were likely to be higher proportions of tourists on days that coincided with the end of package tours. During the course of a month was necessary to ensure the full range of flight times and days were covered. A total of 561 face-to-face interviews were conducted at Sumburgh

(b) Ferry Terminal: At the Northlink ferry terminal passengers were approached after they had checked in both in the terminal building and with the approval of Northlink onboard the vessel prior to sailing. Given the short duration of the check-in period and the fact that there was only 1 sailing per day, a decision was taken to where possible send at least 1 interviewer to every sailing. During the peak season this number was increased. Again interviewers randomly selected passengers for interview, and used a random method to identify a group member for interview, with some joint interviews conducted. A total of 585 face-to-face interviews were conducted at Northlink.

Interviews at Smyril were initially undertaken by A B Assoicates, however there were very few passengers travelling on the service at the beginning of the survey which commenced in October 2005, and interviewers arrived on several occasion to be told noone was boarding. The service stopped over the winter period, and commenced again in April. At this time the Shetland Development Trust had employed a graduate to conduct survey work onboard the Norrona, and it was agreed that this graduate would use a questionnaire compatible with that of the Visitor Survey, in order that one interview could cover both projects. A total of 99 Smyril interviews were conducted.

(c) Cruise Ships: This survey covered a total of 10 vessels arriving in Lerwick during the duration of the project. 7 of these were selected for face-to-face interview and 3 for bus tour surveys. Where self-completion interviews were being conducted on bus tours, they were not conducted face-to-face and vice versa in order to avoid double sampling. Face-to-face interviewees were selected at random returning to the vessel. Self-completion questionnaires were distributed by tour guides on bus tours and were completed by passengers. All those returning questionnaires were entered into a draw for a luxury hamper of Shetland products. A total of 737 cruise surveys were undertaken.

(d) Yachts A total of 23 yachts were surveyed via face-to-face, self-completion and postal survey. Given that the postal survey was conducted for vessels visiting Scalloway it is likely that there is some bias in the data, which will be discussed within the yacht survey section of this report.

2.3.5 Sample Size and Selection

The survey statistics from the 2000 and 2006 surveys were:-

Table 2.1 Interview Statistics

	Interviews Conducted		Visitors Represented		% Interviews Conducted		% Main Exit Interviews	
	2006	2000	2006	2000	2006	2000	2006	2000
Total	**2008**	**1762**	**4021**	**3797**	**100%**	**100%**	**100%**	**100%**
Northlink/P&O	585	873	1141	3675	29%	50%	47%	50%
Smyril	99	322	286		5%	18%	8%	19%
Sumburgh	561	529	816		28%	30%	45%	31%
Other	3	0	5		0%	0%	0%	0%
Cruise	737	0	1716		37%	0%		
Yacht	23	38	57	122	1%	2%		

From the table above it can be seen that 2008 or an additional 246 interviews were conducted in 2006 compared to 2000, covering 4021 or an additional 224 visitors. The inclusion of cruise ship visitors means that the proportionate breakdown of overall interviews is significantly altered, with over 1/3 of interviews being conducted with cruise or day trip visitors. Within the main exit survey there is a proportionately reduced number of Smyril passengers and increased air travellers. This is mainly due to the fact that the 2000 survey specifically asked for over representation of Smyril travellers. The proportionate return within the 2006 main exit survey better reflects the travel patterns of visitors as will be discussed later. Within the 2006 interview targets were set not only by month, but also by type of departure e.g. Loganair, Northlink or Smyril. This made it possible to track the progress of the survey and utilise interviewing resources to the best effect.

2.4 Data Analysis and Reporting

The data from the main face-to-face survey, self completion, and calibration exercises was input into three separate but linkable spreadsheet databases within Microsoft Excel. This was made possible through key numbering and programming of questions and replies across all three surveys, initialised at the questionnaire design stage. A full set of crosstabs has been undertaken for the three elements of the survey i.e. Main Exit, Cruise and Yacht and is contained in Appendix 2. The results and conclusions from the analysis undertaken are brought together in the remainder of this report, along with trends and changes since 2000.

2.5 Additional Issues/Lessons Learnt

Within this survey there have been several issues identified and lessons learnt which should be borne in mind for future similar projects:-

⇒ It is recommended that any future annual survey starts in the off-season period. Delays in commencing the project meant that the survey started in October, although it had originally been scheduled to commence around the Summer season. The benefit of starting off-season was that it allowed issues with the questionnaire, surveying routine etc to be ironed out prior to the bulk of surveying work occurring. This also meant that any issues arising were less serious in terms of missed interviewing opportunity. October is felt to be the best month to start as it is the natural break in the season, or January for a calendar year approach.

⇒ Calibration is an important element of a survey such as this, and should be fully funded. Reliance on third parties, travel operators can not be guaranteed, and self-completion is not a viable option.

2.6 Thank You!!

The successful completion of the visitor survey has been down to a joint effort by a number of organisation, groups and individuals several of whom we would like to acknowledge below:-

- ⇒ Northlink
- ⇒ HIAL Sumburgh
- ⇒ BA/Loganair
- ⇒ Smyril (Lerwick Office)
- ⇒ Shetland Development Trust
- ⇒ LPA
- ⇒ Scalloway Boating Club
- ⇒ SIC Small Port Division
- ⇒ Orkney and Shetland Touring Company
- ⇒ J Leask & Sons
- ⇒ Shetland Enterprise
- ⇒ SIC EDU
- ⇒ Visit Shetland
- ⇒ AB Associates Survey Team
    - Diana Robertson
    - Steven Coutts
    - Maureen Christie
    - Rachael Hunter
    - Anona Hughson
    - Lynsey Henderson
    - Catherine Mullay
- ⇒ Shetland Tour Guides
    - Pat Burgess
    - Zuzanna O'Rourke
    - Wendy Dickson
    - Sarah McBurnie
    - Bella Irvine
    - Billy Robertson
    - Nadia Gould
    - Robert Jamieson
    - John Harmer
    - Silke Reeploee
    - Catriona Anderson
    - Nick Diamond
    - Elma Johnson

2.7 Report Format

The main body of this report has been split into the following sections covering the three surveys undertaken broken down by the groups of questions asked as set out below:-

⇒ Main Exit Survey
- Section 3 Total Travel
- Section 4 Main Purpose of Travel
- Section 5 Trip Details
- Section 6 Travel and Nights Away
- Section 7 Expenditure
- Section 8 Accommodation
- Section 9 Sources of Information and Inspiration
- Section 10 Activities
- Section 11 Feedback and Satisfaction

⇒ Cruise Survey
- Section 12 Total Travel and Trip Details
- Section 13 Expenditure
- Section 14 Sources of Information and Inspiration
- Section 15 Feedback and Satisfaction

⇒ Yacht Survey
- Section 16 Total Travel and Trip Details
- Section 17 Expenditure
- Section 18 Information & Inspiration/Feedback & Satisfaction

⇒ Overall
- Section 19 Volume and Value of Tourism

Figures relating to Orkney within the main exit survey comparison have been sourced from Survey of Visitors to Orkney 2004/2005, TNS Travel and Tourism, Western Isles Visitor Survey 1999, Macpherson Research, and Shetland Visitor Survey 2000 Macpherson Research. For cruise ships comparison has been drawn with the Orkney Cruise Ship Survey 2004, TNS Travel and Tourism and Shetland Cruise Ship Survey 1999, A B Associates. For yachts comparison has been drawn with Shetland Visitor Survey 2000 Macpherson Research.

3. Total Travel

The following figures are based on information from travel operators coupled with calibration data from the survey.

Table 3.1 Total Travel Oct 05 – Sep 06 by Transport Route

	Total	Residents	Visitors	% Residents	% Visitors
Northlink	59,728	32,480	27,248	54%	46%
Sumburgh	58,742	29,831	28,911	51%	49%
Smyril	4,689	924	3,765	20%	80%
Total	**123,159**	**63,235**	**59,924**	**51%**	**49%**

From the table above it can be seen that a total of 123,159 travellers exited Shetland over the period. 63,235 or 51% of these were residents, and 59,924 or 49% were visitors. This shows an increase of 12,745 visitors or 27% from the 47,179 total visitors in the 2000 survey. In terms of the proportionate breakdown by transport provider 46% of travellers on Northlink, 49% from Sumburgh and 80% on Smyril were visitors.

Table 3.2 Breakdown by Transport Route and Interviews Conducted

	Total	Resident	Visitor	Interview
Northlink	48%	51%	46%	47%
Sumburgh	48%	47%	48%	45%
Smyril	4%	2%	6%	8%

From the table above it can be seen that proportionately total travel is fairly evenly split between Northlink and Sumburgh at 48% each, with 4% of travellers using Smyril. In terms of visitor travel Sumburgh is slightly higher at 48% with Northlink at 46%, and Smyril at 6%. The proportion of interviews undertaken is very similar to actual proportionate visitor travel therefore only some minor weighting of results is required.

Table 3.3 Visitor Travel Breakdown by Transport Route

	2006%	2000%	Proportionate %Change	Numerical Change	Numerical % Change
Northlink/P&O	46	30	16	13,140	93
Sumburgh	48	65	-17	-1,576	-5
Smyril	6	5	1	1,181	46

The figures above show a significant proportionate rise of 16% in Sea travel to the Islands from Mainland Scotland, with a significant proportionate decrease in air travel of -17%, and a small proportionate increase for Smyril of 1%. In numerical terms there has been almost a doubling of sea travelling visitors from Mainland Scotland with a rise of 13,140 or 93%. A less significant decease of 1,576 or 5% in air travelling visitors, and given the lower number of visitors using the Smyril route a significant increase of 1,181 or 46%.

Table 3.4 Total Travel Oct 05 – Sep 06 by Month

	Total	Residents	Visitors	% Residents	% Visitors
October	10,498	6,477	4,021	62%	38%
November	6,925	3,969	2,956	57%	43%
December	7,830	4,700	3,130	60%	40%
January	5,775	3,511	2,263	61%	39%
February	6,842	4,060	2,782	59%	41%
March	8,391	5,492	2,899	65%	35%
April	9,293	5,361	3,932	58%	42%
May	9,993	5,200	4,793	52%	48%
June	12,951	5,318	7,633	41%	59%
July	16,984	7,262	9,722	43%	57%
August	16,838	6,658	10,179	40%	60%
September	10,842	5,226	5,615	48%	52%
Total	**123,159**	**63,235**	**59,924**	**51%**	**49%**

From the table above it can be seen that although the split between overall resident and visitor travel is fairly even at 51% and 49% respectively, this is seasonal, with visitor travel exceeding resident during the main tourist season from June to September.

Table 3.5 Breakdown by Month and Interviews Conducted

	Total	Resident	Visitor	Interview
October	9%	10%	7%	1%
November	6%	6%	5%	2%
December	6%	7%	5%	1%
January	5%	6%	4%	1%
February	6%	6%	5%	5%
March	7%	9%	5%	4%
April	8%	8%	7%	6%
May	8%	8%	8%	13%
June	11%	8%	13%	19%
July	14%	11%	16%	19%
August	14%	11%	17%	21%
September	9%	8%	9%	8%

From the table above it can be seen that proportionately peak overall travel periods are the Summer Months of June, July and August. This pattern is the same for visitor travel. For residents however peak travel months are October, July and August, which coincide with school holidays. The proportion of interviews undertaken is relatively similar to actual proportionate visitor travel with additional emphasis on the period from May to August. This reflects both a conscious effort to provide addition interviewing resources during this period of heightened activity, and the overcoming of teething problems with the survey during the initial period.

Table 3.6 Total Visitor Numbers Comparison to Other Areas

	Total
Shetland 2006	59,924
Orkney 2005	127,200
Western Isles 1999	165,000

The table above is based on data from the most recent full visitor surveys conducted in Shetland, Orkney and the Western Isles. As they are for different seasons, and the Western Isles survey was conducted some time ago, they should be viewed as indicative only. However from the table above it can be seen that visitor travel to Shetland is significantly lower than the other two island groups.

4. Main Purpose of Trip

Table 4.1 Main Purpose of Trip by Season and Overall

	2006 %			Change from 2000 %		
	Low Season	High Season	Full Year Weighted	Low Season	High Season	Full Year Weighted
Holiday	34	46	**40**	11	-16	**6**
Business	38	26	**32**	-19	8	**-10**
Hol &Busi	4	2	**3**	1	-2	**0**
VFR (Holiday)	17	20	**19**	3	9	**3**
VFR (Other)	4	1	**2**	2	-1	**0**
Other	3	5	**4**	3	3	**2**

From the table above it can be seen that the main purpose of trip varied throughout the year with holiday visits predominant in the high season, and business trips predominant in the low season. Over the year as a whole holiday visits were predominant. The proportionate change since 2000, shows an increase in holiday travel in the low season period, which could indicate a development of the shoulder season, and a proportionate decrease in holiday travel in the high season which might indicate some evening out of travel patterns to the islands. Possibly the most notable change since 2000 however is that overall holiday travel in 2006 exceeded business travel, with a proportionate rise as opposed to a proportionate drop in business travel. Visiting friends and relatives (VFR) on holiday was relatively even with a higher level in the high season, VFR for other reasons was proportionately relatively low throughout the year, but was higher during the low season. N.B. These figures should be read in conjunction with the table below, which shows an overall rise in all forms of visitor travel to the islands.

For the purposes of further analysis VFR on holiday and other have been combined, and combined business and holiday trips have been assumed to be primarily for business purposes, other has been spread proportionately over the 3 categories of holiday, VFR and business.

Table 4.2 Main Purpose of Trip by Number Weighted

	2006	2000	Difference	% Difference
Holiday	24,744	17,737	7,007	40%
Business	22,099	20,573	1,526	7%
VFR	13,081	8,869	4,212	47%
Total	**59,924**	**47,179**	**12,745**	**27%**

From the table above it can be seen that the largest proportionate increase in travel has been for VFR at 47% or 4,212. Numerically the largest increase has been in holiday travel at 7,007 or 40%, and business travel has increased by 1,526 or 7%. Overall there has been an increase of 27% or 12,745 travellers.

Table 4.3 Main Purpose of Trip by Transport Route

	Holiday	Business	VFR	Total
Northlink	15,940	6,063	5,245	**27,248**
Sumburgh	5,638	15,754	7,519	**28,911**
Smyril	3,166	282	317	**3,765**
Total	**24,744**	**22,099**	**13,081**	**59,924**

From the table above it can be seen that holiday makers predominantly come by Sea, and business and VFR travellers by air.

Table 4.4 Main Purpose of Trip by Transport Route

	2006%			Change 2000%		
	Holiday	Business	VFR	Holiday	Business	VFR
Northlink/P&O	59	22	19	3	-8	6
Sumburgh	20	54	26	1	-3	4
Smyril	84	8	8	-7	3	7

The table above again shows the predominance of sea travel for holiday makers, air for business and VFR travellers. In addition it highlights a proportionate move from business travel to holiday and VFR for Northlink and Sumburgh, and a proportionate move from holiday travel, to business and VFR for Smyril.

The following table details monthly travel by transport route in terms of business and non-business travel. Non-business travel is the combination of holiday and VFR.

Table 4.5 Main Purpose of Trip by Transport Route Monthly by Number

	Northlink			Sumburgh			Smyril			Total		
Month	Total	Business	Non Business	Total	Business	Non Business	Total	Business	Non Business	Total	Business	Non Business
October	**1,495**	332	1,163	**2,503**	1,251	1,251	**22**	2	21	**4,021**	1,586	2,435
November	**937**	312	624	**2,009**	1,306	703	**10**	1	10	**2,956**	1,619	1,337
December	**945**	350	595	**2,173**	1,304	869	**12**	1	11	**3,130**	1,655	1,476
January	**833**	417	417	**1,430**	961	469	**0**	0	0	**2,263**	1,378	886
February	**1,165**	427	738	**1,617**	695	921	**0**	0	0	**2,782**	1,122	1,659
March	**1,100**	550	550	**1,715**	1,072	643	**84**	7	78	**2,899**	1,629	1,270
April	**1,512**	437	1,075	**2,100**	1,459	640	**320**	26	295	**3,932**	1,922	2,010
May	**2,220**	555	1,665	**2,112**	1,433	679	**462**	37	425	**4,793**	2,025	2,769
June	**4,241**	664	3,577	**2,686**	1,702	984	**706**	56	649	**7,633**	2,422	5,210
July	**4,825**	770	4,055	**3,811**	1,553	2,258	**1,086**	76	1,010	**9,722**	2,399	7,323
August	**5,216**	683	4,533	**4,222**	1,909	2,313	**740**	52	689	**10,179**	2,644	7,535
September	**2,759**	566	2,193	**2,534**	1,108	1,425	**322**	25	297	**5,615**	1,700	3,916
Total	**27,248**	**6,063**	**21,185**	**28,911**	**15,754**	**13,157**	**3,765**	**282**	**3,483**	**59,924**	**22,099**	**37,825**

The table above details monthly travel by transport route in terms of business and non-business travel. Non-business travel is the combination of holiday and VFR. This shows the heightened levels of travel during the Summer months on all transport routes, with a sizeable level of non-business travel from Sumburgh in September. In addition it shows traffic picking up more rapidly at Northlink as opposed to Sumburgh during June.

Table 4.6 Main Purpose of Trip by Transport Route Monthly by Percentage

	Northlink		Sumburgh		Smyril		Total	
Month	Business	Non Business	Business	Non Business	Business	Non Business	Business	Non Business
October	22%	78%	50%	50%	8%	92%	39%	61%
November	33%	67%	65%	35%	8%	92%	55%	45%
December	37%	63%	60%	40%	8%	92%	53%	47%
January	50%	50%	67%	33%	0%	0%	61%	39%
February	37%	63%	43%	57%	0%	0%	40%	60%
March	50%	50%	63%	37%	8%	92%	56%	44%
April	29%	71%	70%	30%	8%	92%	49%	51%
May	25%	75%	68%	32%	8%	92%	42%	58%
June	16%	84%	63%	37%	8%	92%	32%	68%
July	16%	84%	41%	59%	7%	93%	25%	75%
August	13%	87%	45%	55%	7%	93%	26%	74%
September	21%	79%	44%	56%	8%	92%	30%	70%
Total	**22%**	**78%**	**54%**	**46%**	**8%**	**92%**	**37%**	**63%**

The table above details proportionate travel patterns by route. This highlights the predominance of non-business travel on Northlink, the movement between predominance of business travel in the low season, to non-business in the high season at Sumburgh, with an overall business predominance. The predominance of non-business travel on Smyril. It should be noted however that due to a lack of calibration data for Smyril, the annual percentage breakdown was applied over the entire year. Overall and for eight months of the year non-business travel was predominant.

Figure 4.1 Main Purpose of Trip by Travel Route Business Visitors

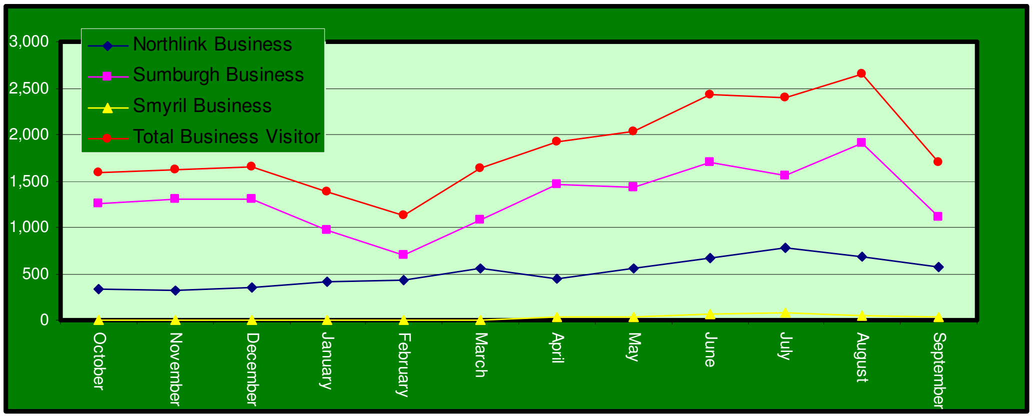


Figure 4.2 Main Purpose of Trip by Travel Route Non-Business Visitors

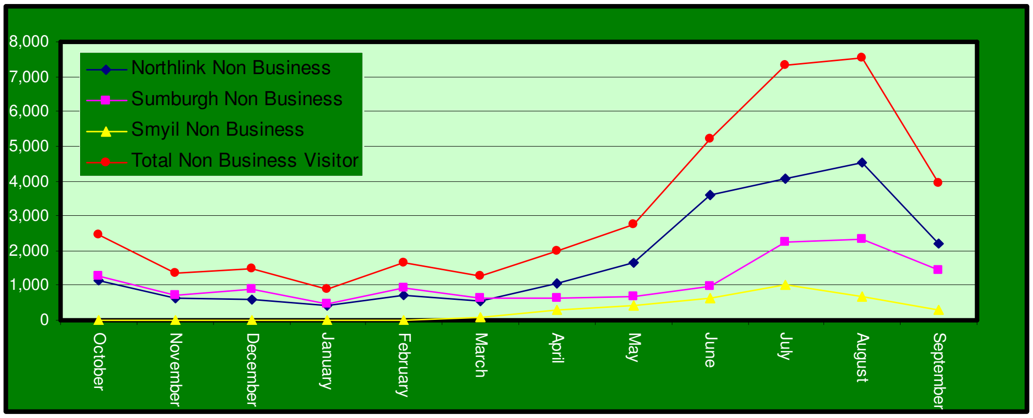
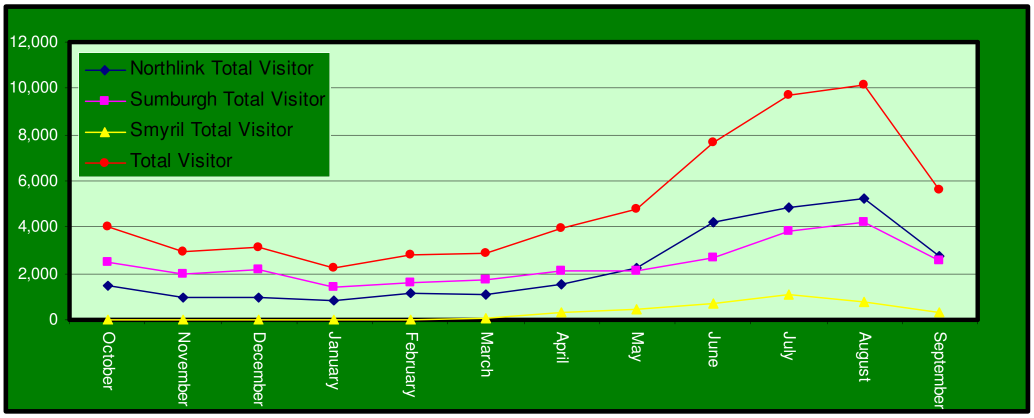


Figure 4.3 Main Purpose of Trip by Travel Route Total Visitors

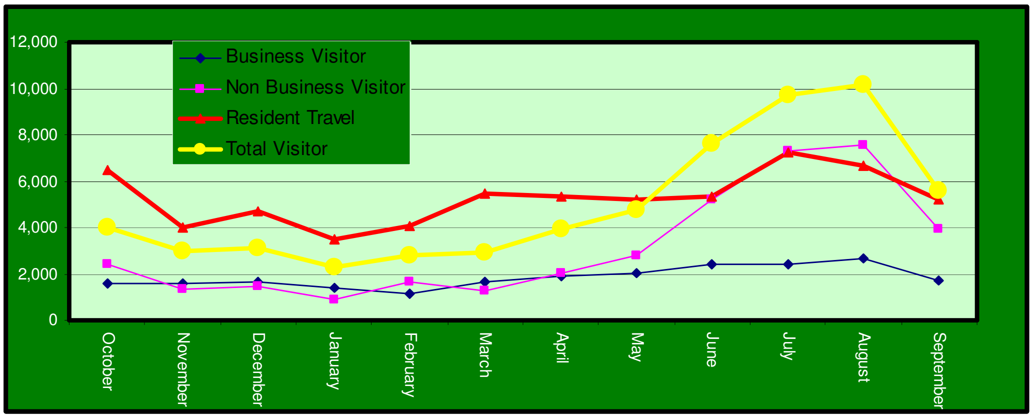


The figures above again highlight that non-business travellers are more likely to travel on Northlink, and business travellers more likely to fly. They also show heightened visitor travel during the Summer months, building up from the shoulder season by all travel routes.

Table 4.7 Total Departures by Month 2005/06

	Business Visitor	Non Business Visitor	Total Visitor Travel	Resident Travel
October	1,586	2,435	4,021	6,477
November	1,619	1,337	2,956	3,969
December	1,655	1,476	3,130	4,700
January	1,378	886	2,263	3,511
February	1,122	1,659	2,782	4,060
March	1,629	1,270	2,899	5,492
April	1,922	2,010	3,932	5,361
May	2,025	2,769	4,793	5,200
June	2,422	5,210	7,633	5,318
July	2,399	7,323	9,722	7,262
August	2,644	7,535	10,179	6,658
September	1,700	3,916	5,615	5,226
Total	**22,099**	**37,825**	**59,924**	**63,235**

Figure 4.4 Total Departures by Month 2005/06



The table and figure above combine data within this section with resident travel data from section 3. This shows visitor travel exceeding resident during the Summer months, being lower during the low season and fairly similar during the shoulder season. It also shows that the major factor in relation to heightened visitor levels is non-business visitors.

Table 4.8 Main Purpose of Trip Comparison to Other Areas

	Number			Percentage		
	Holiday	Business	VFR	Holiday	Business	VFR
Shetland 2006	24,744	22,099	13,081	41	37	22
Orkney 2005*	83,100	16,956	27,144	65	13	21
Western Isles 1999*	108,900	29,700	26,400	66	18	16

*Approximation

From the table above it can be seen that in addition to heightened visitor levels, both Orkney and the Western Isles also have higher proportions of holiday visitors. Shetland has proportionately higher levels of business and VFR travellers. In numerical terms however VFR totals for Shetland are around half of the other two island groups, and business travel is significantly higher than Orkney, but lower than the Western Isles.

Within the 2006 Shetland survey there were significant variations of purpose of trip between different types of respondent. For a detailed assessment see the cross tabulations for the survey, however some of the main points are detailed below:-

Holiday Visitors are more likely to be:-

- Female (53%)
- Aged over 55 (47%)
- Social class C1 (44%)
- Sea travellers (77%)
- Visit during the high season (66%)
- Stay in a hotel (42%)
- Be a first time visitor (81%)
- Stay between 1 and 7 nights (79%)
- Stay at least 1 night in Lerwick (66%)
- Come from within the UK (58%)

Business Visitors are more likely to be :-

- Male (80%)
- Aged 25-55 (78%)
- Social class C1 (36%)
- Air travellers (73%)
- Visit during the high season (50%)
- Stay in a hotel (48%)
- Be a repeat visitor (68%)
- Stay between 1 and 3 nights (57%)
- Stay at least 1 night in Lerwick (67%)
- Come from Scotland (71%)

VFR Visitors are more likely to be :-

- Female (62%)
- Aged over 55 (46%)
- Social class C1 (43%)
- Air travellers (59%)
- Visit during the high season (59%)
- Stay with friends and relatives (72%)
- Be a repeat visitor (75%)
- Stay more than 4 nights (79%)
- Stay at least 1 night in Lerwick (44%)
- Come from within the UK (88%)

Table 4.9 Main Purpose of Trip Main or Second Holiday

	2006 %		2000 %	
	Main	**Second**	**Main**	**Second**
Holiday Visitors	49	51	64	36
VFR Holiday Visitors	32	68	44	56
All Holiday Visitors	**44**	**56**	**59**	**41**
Scottish Holiday Visitors	25	75	45	55
Other UK Holiday Visitors	41	59	57	43
Overseas Holiday Visitors	64	36	68	32

Holiday visitors and those VFR on holiday were asked if their visit to Shetland was their main or a second holiday for the year. From the table above it can be seen that for all holiday makers other than overseas visitors, the majority were on a second holiday. Comparison with 2000 statistics would appear to show a trend toward second holiday travel to the islands. It should also be noted some of those quoting this trip as their main holiday, may not be visiting Shetland as their sole destination, but may be visiting the islands during a longer trip to the Highlands and Islands or Scandinavia.

5. Trip Details

5.1 Social Group

Table 5.1 Social Group (based on chief income earner)

	2006 %	2000%	% Difference
AB	27	35	-8
C1	41	42	-1
C2	21	17	4
DE	7	5	2
No Response	4	1	3

From the table above it can be seen that the most frequent occupation category was C1 at 41%. This was also the most frequent in 2000 at 42%. There would appear to have been a proportionate drop in AB, down 8% from 35% in 2000, to 27% in 2006. However this may be due to retired respondent who did no specify a previous occupation, and are included in no response.

Table 5.2 Social Group Comparison to Other Areas

	Shetland %	Orkney %	Western Isles %
AB	27	33	40
C1	41	34	40
C2	21	14	14
DE	7	10	6
No Response	4	9	0

From the table above it can be seen that the most frequent occupation category for all areas was C1. Shetland would however appear to have lower levels of AB, and higher levels of C2, than the other 2 island groups.

5.2 Party Type

Table 5.3 Party Type by Respondent

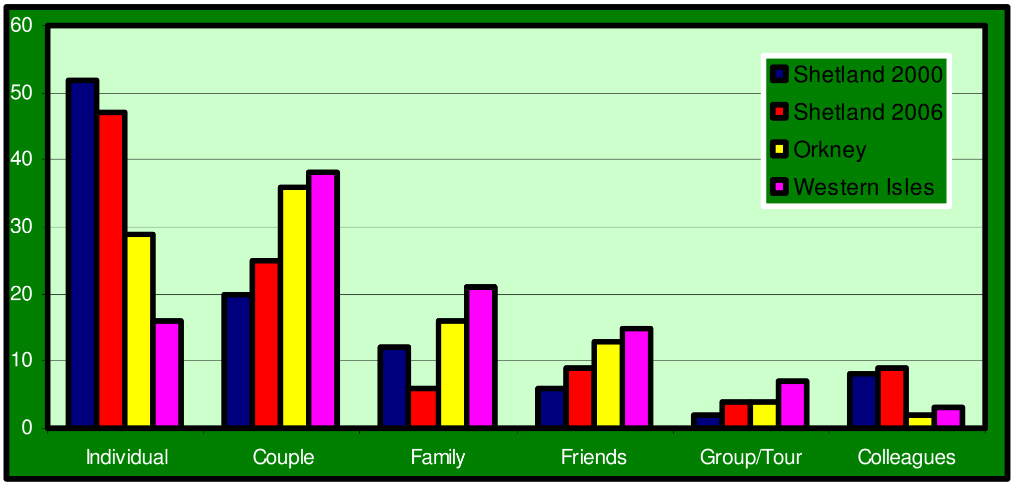
	2006 %	2000%	% Difference
Individual	47	52	-5
Couple	25	20	5
Family	6	12	-6
Friends	9	6	3
Organised Group/Tour	4	2	2
Business/Work Colleagues	9	8	1
Other	0	0	0

Table 5.4 Party Type Comparison to Other Areas by Respondent

	Shetland	Orkney	Western Isles
Individual	47	29	16
Couple	25	36	38
Family	6	16*	21
Friends	9	13*	15
Organised Group/Tour	4	4	7
Business/Work Colleagues	9	2	3*
Other	0	0	0

*Approximation

Figure 5.2 Party Type Comparison to Other Areas by Respondent



It should be noted that these figures relate to respondents and not proportions of all visitors, that is calculated further on within this section. From the tables and chart above it can be seen that individual travel forms the largest proportion of respondent travel in Shetland at 47% although this has decreased since 2000. Couples are the most common party type to Orkney and the Western Isles, and although proportionate couple travel to Shetland has risen by 5% since 2000 it is still significantly lower than the other two island groups. This may reflect increased levels of individual business travel to Shetland. Family parties to Shetland have declined proportionately since 2000, and are significantly lower than both Orkney and the Western Isles. Travel with friends has increased slightly to 9%, but is still lower than for the other two areas. Organised tours although proportionately quite low at 4% have risen by 2% since 2000, and would appear to be proportionately similar to Orkney, but lower than the Western Isles. Travel with work colleagues at

9% is significantly higher in Shetland, and again this highlights proportionately higher levels of business travel to the islands.

Table 5.5 Party Type by All Visitors

	2006 %	2000%	% Difference
Individual	25	28	-3
Couple	28	21	7
Family	11	20	-9
Friends	15	8	7
Organised Group/Tour	8	11	-3
Business/Work Colleagues	12	11	1
Other	1	1*	0

*Approximation

From the table above it can be seen that in terms of all visitors to the islands individual travel accounts for a quarter, which has dropped slightly from 2000, when it was 28%. Couples form the largest proportion at 28%, which is 7% higher than in 2000, and now exceeds individual travel. There has been a significant decrease in family travel which only accounted for about 1 in every 10 travellers, down from 1 in 5 in 2000. Travel with friends has increased by 7% to 15%. Somewhat surprisingly although the proportion of respondents stating they were with an organised group/tour has risen, the proportionate number of visitors within groups has fallen, which could show a reduction in overall organised group size.

5.3 Party Size

Table 5.6 Average Party Size

		2006	2000	Difference
OVERALL		**1.85**	**1.82**	**0.03**
Purpose of Trip	Holiday	2.12	2.39	-0.27
	Business	1.46	1.52	-0.06
	VFR	1.78	1.96	-0.18
Season	Low	1.82	1.60	0.22
	High	1.87	2.34	-0.47
Exiting Via	Northlink/P&O	1.95	2.22	-0.27
	Sumburgh	1.57	1.53	0.04
	Smyril	2.89	2.84	0.05

From the table above it can be seen that overall average party size has remained relatively stable rising slightly from 1.82 to 1.85. Party size by purpose of trip has fallen particularly for holiday travellers, which has reduced from 2.39 to 2.12, but is still the largest of the three. Average party size during the low season has risen from 1.60 to 1.82, but has fallen quite significantly during the high season from 2.34 to 1.87. High season party size continues to be the greatest although at a much reduced level. This could again show the development of the shoulder season, and an evening out of travel patterns. Party size on Northlink/P&O has fallen from 2.22 to 1.95, but has risen slightly at both Sumburgh and Smyril up from 1.53 and 2.84 to 1.57 and 2.89 respectively. Party size on Smyril continues to be the highest.

Table 5.7 Average Party Size Comparison to Other Areas

	Shetland	Orkney	Western Isles
Overall	1.85	2.20	2.12

From the table above it can be seen that average party size for Shetland travellers is lower than the other two island groups, again this may be due to higher proportions of individual and business travel.

5.4 Gender

Table 5.8 Gender of Respondent

	2006 %	2000%	% Difference
Male	57	63	-6
Female	43	37	6

From the table above it can be seen that 57% of respondents were male and 43% female, this is 6% lower for males and 6% higher for females than in 2000. The main variation by visitor type similarly to 2000 is for business visitors 79% male and 21% female (88% and 12% in 2000), and it should be noted that these variations may influence some of the cross tabs e.g. 61% of respondents staying in hotels were male. On the other hand female respondents were more likely to be VFR 29% as opposed to 14% male

Table 5.9 Gender of Visitor

	2006 %
Male	58
Female	42

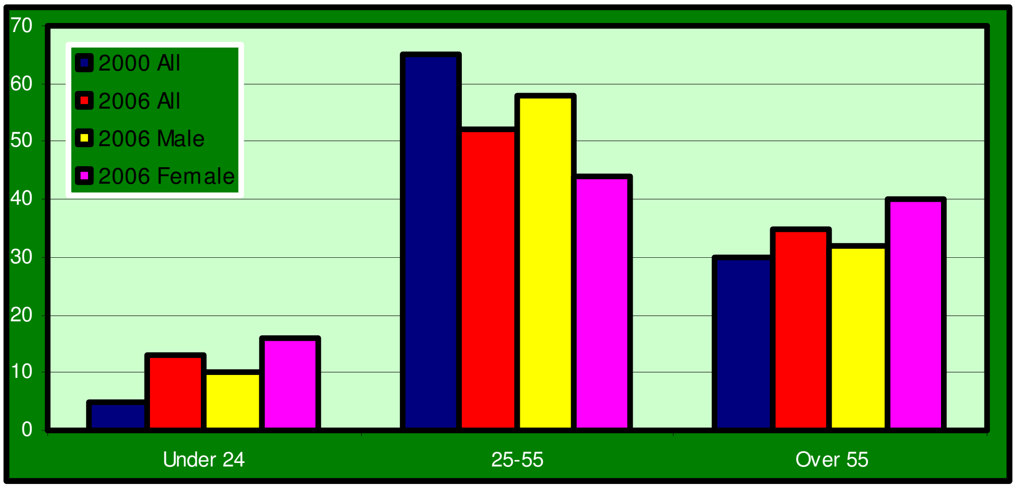
From the table above it can be seen that proportions of overall visitors in 2006 were very similar to proportions of respondents with 58% male and 42% female.

5.5 Age

Table 5.10 Age of Visitors by Gender

	2000 All %	2006 All %	2006 Male %	2006 Female %
Under 24	5	13	10	16
25-55	65	52	58	44
Over 55	30	35	32	40

Figure 5.3 Age of Visitors by Gender

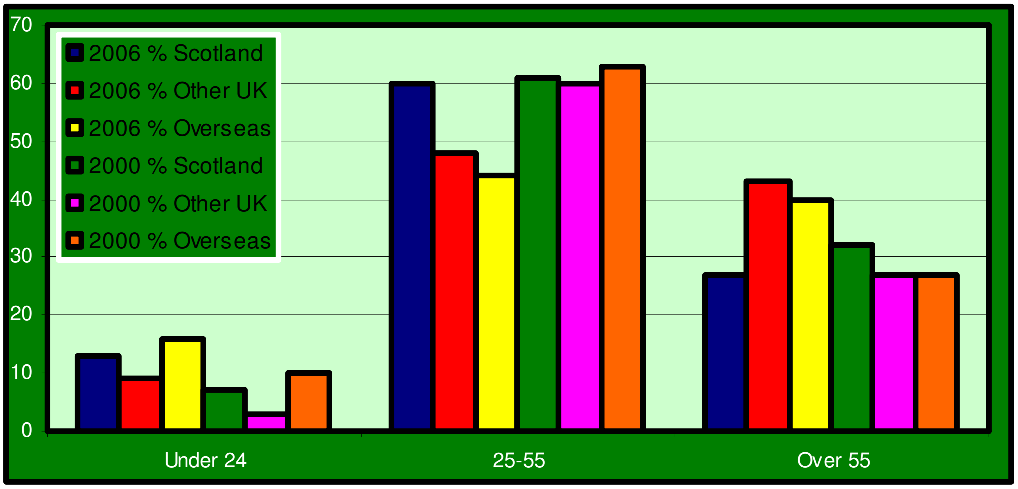


The tables and figure above show a proportionate rise in under 24 travel to the islands, up from 5% to 13%, a fall in 25-55 year old travel down from 65% to 52% and a rise in over 55 travel up from 30% to 35%. In terms of gender there are proportionately more females under the age of 24, 16% as opposed to 10%. There are proportionately more males aged between 25 and 55, 58% as opposed to 44%, and proportionately more females aged over 55, 40% as opposed to 32%. This may reflect heightened male business travel and female VFR.

Table 5.11 Age of Visitors by Origin

	2006 % Scotland	2006 % Other UK	2006 % Overseas	2006 % Scotland	2006 % Other UK	2006 % Overseas
Under 24	13	9	16	7	3	10
25-55	60	48	44	61	60	63
Over 55	27	43	40	32	27	27

Figure 5.4 Age of Visitors by Origin



From the table and chart above it can be seen that under 24 travel has increased and 25-55 year old travel has decreased proportionately from all areas. In terms of over 55 travel this has decreased proportionately from within Scotland, but increased for the rest of the UK and overseas. Looking at the overall age patterns for 2006 it would appear that Scottish visitors were proportionately younger, but this may be partly due to business travellers under the age of 55, who tended to be mainly Scottish. There are also proportionately more under 24 overseas visitors, and the proportionately fastest growing segments of the market would appear to be the over 55's from outwith Scotland.

Table 5.12 Age of Visitors Comparison to Other Areas

	Shetland%	Orkney%
Under 24	13	6
25-55	52	60
Over 55	35	34

From the table above it can be seen that Shetland attracted proportionately more under 24 year olds than Orkney, and less 25-55 year olds. Figures for over 55 year olds are proportionately relatively similar.

5.6 Origin

Table 5.13 Area of Origin All Visitors

	2006 %	2000%	% Difference
Scotland	44	45	-1
Rest of UK	32	35	-2
Overseas	24	20	3

From the table above it can be seen that overall there has been a slight proportionate decrease in the levels of UK visitors to the islands and a slight increase in overseas visitors since 2000. In proportionate terms however the most significant market remains the Scotland at 44%, with 76% of all visitors coming from within the UK.

Table 5.14 Area of Origin All Visitors Comparison to Other Areas

	Shetland%	Orkney%	Western Isles%
Scotland	44	42	38
Rest of UK	33	34	38
Overseas	23	21	24

From the table above it can be seen that Shetland has proportionately more Scottish visitors, again possibly higher proportionate levels of Scottish business travel. The Western Isles has higher proportions of visitors from the rest of the UK and slightly more from overseas.

Table 5.15 Country of Origin

	Low Season	High Season	Holiday	Business	VFR	Full Year
UK	**82**	**73**	**58**	**92**	**87**	**76**
Scotland	50	40	20	69	49	44
Highlands & Islands	14	6	3	15	11	**9**
North East	15	11	5	20	14	**13**
East	4	4	3	5	4	**4**
Central	2	3	2	6	1	**3**
South East	6	7	3	9	9	**6**
South West	9	9	4	14	10	**9**
England	30	31	35	21	36	30
North East	5	5	5	4	6	**5**
North West	6	6	7	4	6	**6**
Midlands	7	5	6	4	7	**5**
London/SE	8	10	12	7	10	**9**
South West	3	4	4	2	6	**4**
East of England	1	1	1	0	1	**1**
Wales	1	1	2	1	1	**1**
Northern Ireland	1	1	1	1	1	**1**
EUROPEAN	**10**	**16**	**24**	**6**	**8**	**14**
Denmark	1	1	2	1	0	**1**
Faroe	0	1	1	1	0	**1**
France	1	1	2	0	0	**1**
Germany	2	2	3	0	1	**2**
Iceland	0	1	1	1	1	**1**
Netherlands	1	2	3	0	1	**1**
Norway	1	3	4	1	1	**2**
Other European	4	5	8	2	4	**5**
NON-EUROPEAN	**8**	**11**	**18**	**2**	**5**	**10**
Australia/N Zealand	1	4	5	0	3	**3**
USA/Canada	5	6	12	1	2	**6**
Other Overseas	2	1	1	1	0	**1**
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**

From the table above it can be seen that overall, for both high and low season and by purpose of trip, visitors predominantly come from the UK, and other than holiday visitors, were predominantly Scottish. 76% of all visitors are British, with 44% Scottish and 30% English. There is very little visitor travel from Wales and Northern Ireland. Total UK visitors vary from 92% for business travellers to 58% for holiday makers. 14% of visitors were European varying from 24% of holiday makers to 6% of business travellers. 10% of visitors were Non-European varying from 18% of holiday makers to 2% of business travellers.

Table 5.16 Country of Origin % Comparison 2000/2006

2006	Low Season	High Season	Holiday	Business	VFR	Full Year
UK	**82**	**73**	**58**	**92**	**87**	**76**
Scotland	50	40	20	69	49	44
England	30	31	35	21	36	30
Wales/N Ireland	2	2	3	2	2	2
EUROPEAN	**10**	**16**	**24**	**6**	**8**	**14**
NON-EUROPEAN	**8**	**11**	**18**	**2**	**5**	**10**
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**
2000	**Low Season**	**High Season**	**Holiday**	**Business**	**VFR**	**Full Year**
UK	**85**	**62**	**46**	**92**	**88**	**80**
Scotland	56	28	14	65	45	44
England	28	32	30	26	41	34
Wales/N Ireland	1	2	2	1	2	2
EUROPEAN	**6**	**25**	**33**	**5**	**3**	**11**
NON-EUROPEAN	**9**	**13**	**21**	**3**	**9**	**9**
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**
Change	**Low Season**	**High Season**	**Holiday**	**Business**	**VFR**	**Full Year**
UK	**-3**	**11**	**12**	**0**	**-1**	**-4**
Scotland	-6	12	6	4	4	0
England	2	-1	5	-5	-5	-4
Wales/N Ireland	1	0	1	1	0	0
EUROPEAN	**4**	**-9**	**-9**	**1**	**5**	**3**
NON-EUROPEAN	**-1**	**-2**	**-3**	**-1**	**-4**	**1**
TOTAL	**0**	**0**	**0**	**0**	**0**	**0**

From the table above it can be seen that there has been a proportionate rise in UK high season and holiday travel of 11% and 12% respectively. High season travel being influenced by a proportionate increase in Scottish visitors, holiday travel by both Scottish and English travellers. There has been a corresponding proportionate fall in travellers from the rest of the world, predominantly Europe. Overall however there has been a proportionate fall in UK travellers of 4% influenced by English travellers, and a corresponding rise of 4% for travellers from the rest of the world. It should be noted however that these figures show proportionate change, and as overall visitor numbers have risen this do not directly translate to a drop/rise in the number of visitors coming to the islands.

5.7 Previous Visits

Table 5.17 Previous Visits by Respondent

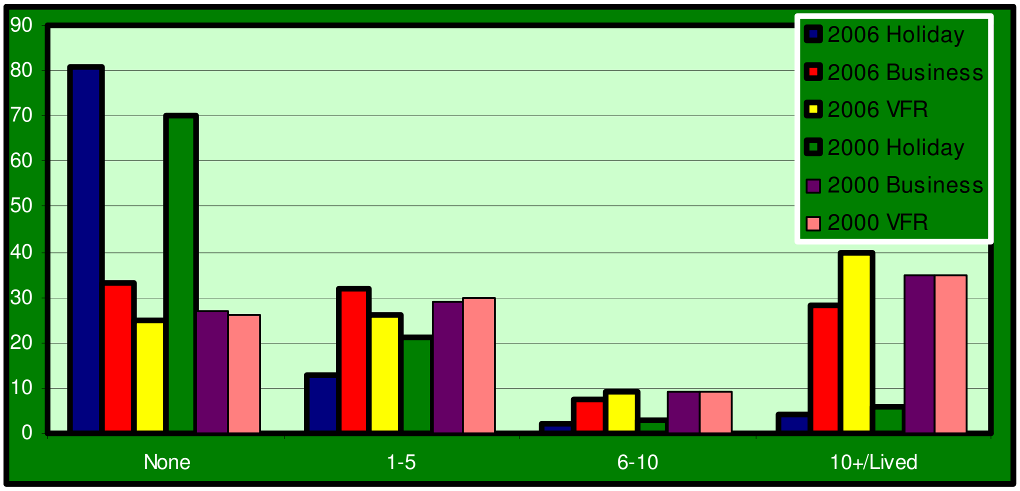
<table>
<tr><th></th><th>2006 %</th><th>2006%</th></tr>
<tr><td>Never/First Time</td><td>51</td><td>42</td></tr>
<tr><td>Once</td><td>9</td><td rowspan="3">26</td></tr>
<tr><td>Twice</td><td>6</td></tr>
<tr><td>3-5 times</td><td>8</td></tr>
<tr><td>6-10 times</td><td>6</td><td>7</td></tr>
<tr><td>More than 10 times</td><td>13</td><td>25</td></tr>
<tr><td>Have lived in Shetland</td><td>7</td><td></td></tr>
</table>

From the table above it can be seen that 51% of respondents were on their first visit to Shetland and 49% had been before. A sizeable percentage 13% had been more than 10 times, and 7% had previously lived in the islands. The most significant proportionate changes since 2000 were a rise in first time visitors, who now form more than half of all visitors, and a fall in those who have visited more than 10 times. If those who have previously lived in Shetland are included in the 10+ total this amounts to 5%.

Table 5.18 Previous Visits by Trip Purpose

<table>
<tr><th rowspan="2"></th><th colspan="3">2006%</th><th colspan="3">2000%</th></tr>
<tr><th>Holiday</th><th>Business</th><th>VFR</th><th>Holiday</th><th>Business</th><th>VFR</th></tr>
<tr><td>None</td><td>81</td><td>33</td><td>25</td><td>70</td><td>27</td><td>26</td></tr>
<tr><td>1-5</td><td>13</td><td>32</td><td>26</td><td>21</td><td>29</td><td>30</td></tr>
<tr><td>6-10</td><td>2</td><td>7</td><td>9</td><td>3</td><td>9</td><td>9</td></tr>
<tr><td>10+</td><td>3</td><td>25</td><td>14</td><td>6</td><td>35</td><td>35</td></tr>
<tr><td>Lived in Shetland</td><td>1</td><td>3</td><td>26</td><td></td><td></td><td></td></tr>
</table>

Figure 5.5 Previous Visits by Trip Purpose

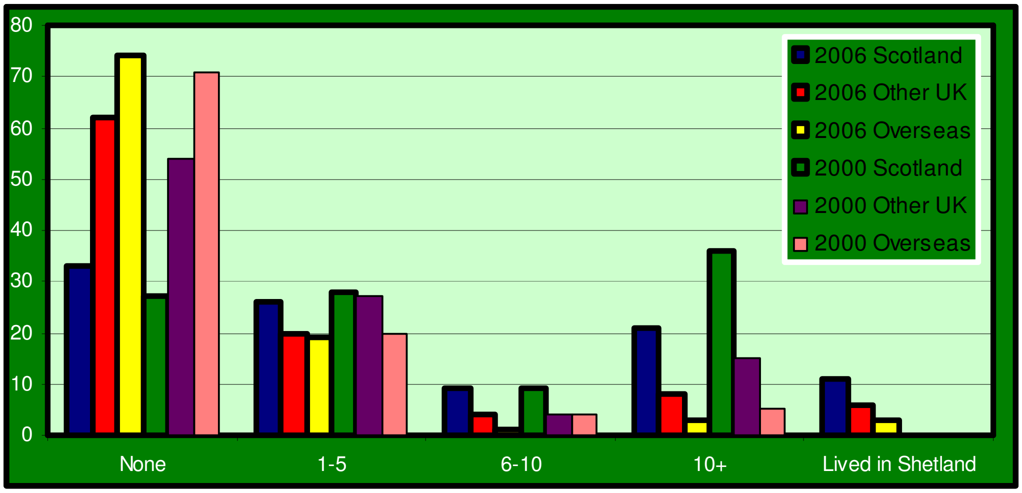


From the table and chart above it can be seen that 81% of holiday makers were on their first visit to the islands, a proportionate rise of 11% since 2000. There has also been a proportionate rise in first time business visitors up 6% to 33%. Holiday makers who had previously visited between 1 and 5 times fell proportionately by 8% to 13%. Business travellers who had visited more than 10 times fell proportionately from 35% to 28%, including those who had previously lived in Shetland. Travellers VFR who had been to the islands more than 10 times rose proportionately by 5% from 35%to 40%, again including those who had previously lived in Shetland. It should be noted that 26% of those visiting VFR had previously lived in the islands.

Table 5.19 Previous Visits by Origin

	2006			2000		
	Scotland	Other UK	Overseas	Scotland	Other UK	Overseas
None	33	62	74	27	54	71
1-5	26	20	19	28	27	20
6-10	9	4	1	9	4	4
10+	21	8	3	36	15	5
Lived in Shetland	11	6	3			

Figure 5.6 Previous Visits by Origin



From the table and chart above it can be seen that a significant majority of overseas visitors and UK visitors from outwith Scotland were on their first trip to the islands 62% and 74% respectively. This shows a proportionate increase for all areas of origin since 2000. Those visiting between 1-5 times from other areas of the UK has fallen proportionately by 7% to 20%.

6. Travel and Nights Away

6.1 Arrival and Exit Points

Table 6.1 Arrival and Exit Points

		Entry %	Exit %
Northlink	Aberdeen	36	39
	Orkney	9	9
Smyril	Faroe	1	1
	Iceland	1	1
	Denmark	1	1
	Norway	2	1
Sumburgh	Aberdeen	21	19
	Inverness	4	4
	Orkney	4	3
	Edinburgh	9	9
	Glasgow	7	9
	Wick	1	1
	Norway	1	0
	Stanstead	3	3

From the table above it can be seen that that entry and exit levels by route are relatively similar, suggesting that in the main visitors enter and exit via the same route. Although there can be some both planned and unplanned exceptions e.g. Smyril passengers using Shetland as a stepping stone to the Mainland UK, and air travellers using Northlink due to fog at Sumburgh. The most significant route overall is Northlink Aberdeen with between in 1 in 3 and 2 in 5 visitors. The most significant air route is Sumburgh Aberdeen with around 1 in 5 visitors.

6.2 Nights Away

Table 6.2 Nights Away

	Total	Scotland	Shetland	Other
0	3	49	8	73
1-3	22	35	42	9
4-7	30	7	31	5
8-14	23	5	13	4
15-21	8	2	3	2
22-28	4	1	1	3
More than 28	10	1	2	4
Total	100	100	100	100
Average	**14.5**	**2.4**	**5.8**	**6.3**
2000 Average	**13.0**		**6.8**	
Change	**1.5**		**1.0**	

From the table above it can be seen that Shetland visitors on average spent 14.5 nights away from home during their trip, and that 5.8 nights were spent in Shetland. This shows a rise of 1.5 nights away from home per trip, and a fall of 1 night in Shetland since 2000. 49% of respondents had spent no nights in other areas of Scotland during their trip, and 73% no nights in any other area. The most frequent number of nights away in total was 4-7 at 30%, with 1-3 nights spent in Shetland 42%. 73% of visitors spent between 1 and 7 nights in the islands, with 8% not staying a night at all.

Table 6.3 Nights Away by Origin - Scotland

	Total	Scotland	Shetland	Other
0	5	57	11	89
1-3	38	40	49	5
4-7	34	2	28	2
8-14	15	0	8	1
15-21	4	0	2	1
22-28	2	0	1	1
More than 28	3	0	1	1
Total	100	100	100	100
Average	6.5	0.9	4.4	1.1
2000 Average	9.3		6.7	
Change	-2.8		-2.3	

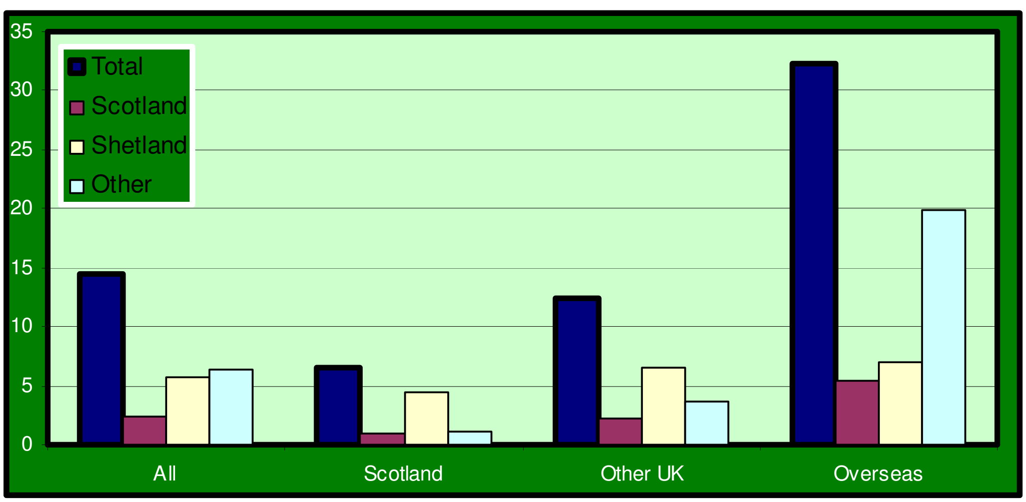
Table 6.4 Nights Away by Origin – Other UK

	Total	Scotland	Shetland	Other
0	0	39	6	71
1-3	12	43	35	10
4-7	36	12	35	7
8-14	30	4	18	3
15-21	10	1	1	2
22-28	4	0	3	2
More than 28	8	0	2	4
Total	100	100	100	100
Average	12.4	2.2	6.6	3.6
2000 Average	16.0		8.3	
Change	-3.6		-1.7	

Table 6.5 Nights Away by Origin - Overseas

	Total	Scotland	Shetland	Other
0	1	43	8	38
1-3	2	19	39	16
4-7	16	10	32	10
8-14	27	17	13	10
15-21	15	5	4	5
22-28	10	2	1	9
More than 28	28	3	3	14
Total	100	100	100	100
Average	32.3	5.4	7.0	19.9
2000 Average	31.3		5.7	
Change	1.0		1.3	

Figure 6.1 Average Nights by Origin



From the tables and figure above it can be seen that Scottish visitors on average spent 6.5 nights away from home during their trip, and that 4.4 nights were spent in Shetland. This shows a fall of 2.8 nights away from home per trip, and a fall of 2.3 nights in Shetland since 2000, and are the lowest average stay and nights away figures of the three groups. 57% of respondents had spent no nights in other areas of Scotland during their trip, and 89% no nights in any other area. The most frequent number of nights away in total was 1-3 at 38%, with 1-3 nights spent in Shetland 49%. 78% of visitors spent between 1 and 7 nights in the islands, with 8% not staying a night at all.

Visitors from other areas of the UK on average spent 12.4 nights away from home during their trip, with 6.6 nights spent in Shetland. This shows a fall of 2.3 nights away from home per trip, and a fall of 1.7 nights in Shetland since 2000, and are the middle average stay and nights away figures of the three groups, although nights spent in Shetland were very close to the overseas average of 7. 43% of respondents had spent between 1 and 3 nights in other areas of Scotland during their trip, and 71% no nights in any other area. The most frequent number of nights away in total was 1-3 at 43%, with 1-3 nights spent in Shetland 35%. 70% of visitors spent between 1 and 7 nights in the islands, with 6% not staying a night at all.

Visitors from overseas on average spent 32.3 nights away from home during their trip, with 7 nights spent in Shetland. This shows a rise of 1 night away from home per trip, and 1.3 nights in Shetland since 2000, and are the middle highest average stay and nights away figures of the three groups. It should be noted however that overseas visitors spend on average 22% of their total trip time in Shetland as compared to 68% for Scottish visitors and 53% for other UK visitors, suggesting that overseas visitors travel more extensively to other places during their trips. 43% of respondents had spent no nights in other areas of Scotland during their trip, and 38% no nights in any other area. The most frequent number of nights away in total was more than 28 at 28%, with the most frequent for Shetland 1-3 nights 39%, again highlighting extended travel patterns for overseas visitors. 71% of visitors spent between 1 and 7 nights in the islands, with 8% not staying a night at all.

Table 6.6 Nights Away by Purpose- Holiday

	Total	Scotland	Shetland	Other
0	0	32	5	53
1-3	5	36	42	14
4-7	30	13	36	10
8-14	30	13	13	7
15-21	14	3	2	4
22-28	5	1	1	5
More than 28	14	2	0	7
Total	100	100	100	100
Average	**19.5**	**4.3**	**4.7**	**10.4**

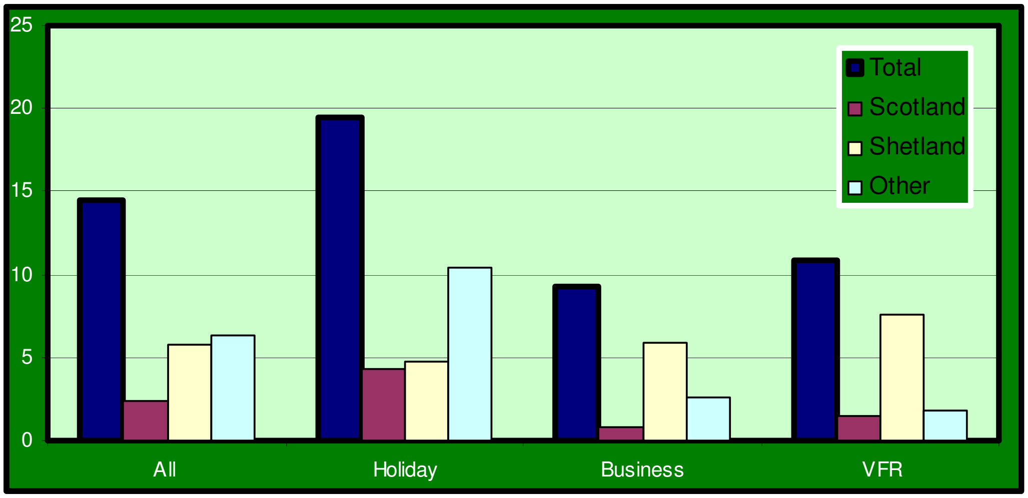
Table 6.7 Nights Away by Purpose- Business

	Total	Scotland	Shetland	Other
0	7	65	15	86
1-3	48	31	55	6
4-7	22	3	16	3
8-14	10	0	7	1
15-21	3	1	3	0
22-28	4	0	1	2
More than 28	7	0	4	3
Total	100	100	100	100
Average	**9.3**	**0.8**	**5.8**	**2.7**

Table 6.8 Nights Away by Purpose- VFR

	Total	Scotland	Shetland	Other
0	0	54	1	88
1-3	9	41	20	5
4-7	45	4	49	2
8-14	31	0	23	3
15-21	8	0	4	1
22-28	3	0	2	0
More than 28	5	1	2	2
Total	100	100	100	100
Average	**10.9**	**1.5**	**7.6**	**1.8**

Figure 6.2 Average Nights by Purpose



From the tables and figure above it can be seen that holiday visitors on average spent 19.5 nights away from home during their trip, and that 4.7 nights were spent in Shetland. This is the longest average length of trip of any of the three groups, and the lowest average stay in Shetland, although this should be read in conjunction with the business visitor narrative which follows, where a small number of visitors staying for a long period may have influenced the average. 0% of respondents had spent no nights away from home in total, with 53% spending no nights in any other area outside Scotland. The most frequent number of nights away in total was 4-7 and 8-14 both at 30%, with 1-3 nights spent in Shetland 42%. 78% of visitors spent between 1 and 7 nights in the islands, with 5% not staying a night at all.

Business visitors on average spent 9.3 nights away from home during their trip, and that 5.8 nights were spent in Shetland. This is the shortest average length of trip of any of the three groups, and the middle average stay in Shetland. However there where a small number of business visitors staying for a long period, who may have had a disproportionate influence on the average, and it should be noted that 70% of business visitors spent less than 3 nights in the islands, with 15% not staying a night at all. 7% of respondents had spent no nights away from home at all and this was the only group where this total exceeded 0. 65% spent no nights in Scotland, with 86% spending no nights in any area outside Scotland. The most frequent number of nights away in total was 1-3 at 48%, with 1-3 nights spent in Shetland 55%. 81% of visitors spent between 1 and 7 nights in the islands, with 15% not staying a night at all.

VFR visitors on average spent 10.9 nights away from home during their trip, and that 7.6 nights were spent in Shetland. This is the middle average length of trip of any of the three groups, and the longest average stay in Shetland. 0% of respondents had spent no nights away from home at all. 54% spent no nights in Scotland, with 88% spending no nights in any area outside Scotland. The most frequent number of nights away in total was 4-7 at 45%, with 4-7 nights spent in Shetland 49%. 72% of visitors spent between 4 and 14 nights in the islands, with only 1% not staying a night at all.

Table 6.9 Nights Spent in Islands Comparison to Other Areas

	Shetland%	Orkney%	Western Isles%
0	8	5	
1-3	42	40	
4-7	31	39	
8-14	13	13	
More than 14	6	3	
Total	100	100	
Average	**5.8**	**5.3**	**6.4**

From the table above it can be seen that the Western Isles recorded a slightly longer average stay than Shetland at 6.4 nights, and Orkney a slightly shorter average stay at 5.3 nights. For both Orkney and Shetland the most common number of nights spent was between 1 and 3 at 40% and 42% respectively, however Orkney had a higher percentage staying between 4 and 7 nights at 39%, and Shetland both more staying over 14 nights at 6%, as well as not staying at all, 8%.

6.3 Visits to Shetland Areas

Table 6.10 Average Length of Stay Shetland Area (Nights)

	Scot	UK	OS	Hol	Busi	VFR	Total
Lerwick	2.42	1.97	3.43	2.14	3.01	2.59	**2.51**
Central Mainland	0.48	0.70	0.23	0.40	0.36	0.97	**0.49**
North Mainland	0.34	0.52	0.53	0.57	0.18	0.68	**0.44**
South Mainland	0.24	1.18	1.50	0.40	1.11	1.04	**0.84**
West Mainland	0.18	0.43	0.36	0.25	0.19	0.53	**0.30**
Yell	0.20	0.27	0.08	0.13	0.03	0.61	**0.19**
Unst	0.23	0.53	0.38	0.39	0.20	0.51	**0.36**
Fetlar	0.08	0.12	0.14	0.10	0.10	0.16	**0.11**
Whalsay	0.01	0.09	0.01	0.01	0.00	0.15	**0.03**
Out Skerries	0.00	0.01	0.01	0.01	0.00	0.00	**0.01**
Bressay	0.03	0.09	0.12	0.02	0.07	0.19	**0.07**
Fair Isle	0.17	0.67	0.11	0.23	0.55	0.10	**0.32**
Papa Stour	0.01	0.00	0.01	0.01	0.00	0.01	**0.01**
Foula	0.03	0.03	0.00	0.03	0.00	0.07	**0.03**
Total	**4.4**	**6.6**	**6.9**	**4.7**	**5.8**	**7.6**	**5.8**

From the table above it can be seen that Lerwick has a much higher average stay both overall at 2.51 nights and for all groups detailed above, than any other area of Shetland. Overall the area with the second longest average was the South Mainland at 0.84 nights, however this varied by group, with the Central Mainland ranking second for Scottish visitors at 0.48 nights, and the North Mainland ranking second for holiday makers at 0.57 nights. Average length of stay figures in the main were lower for Non-Mainland than Mainland areas. Overall for non-mainland areas the highest average length of stay was Unst at 0.36 nights, closely followed by Fair Isle at 0.32 nights. One of these two areas ranked highest among the non-mainland areas for all groups analysed, with the exception of VFR where Yell ranked highest at 0.61 nights.

Table 6.11 Average Length of Stay Shetland Area (Nights)

	2006	2000	Difference
Lerwick	2.51	2.80	-0.29
Central Mainland	0.49	0.60	-0.11
North Mainland	0.44	0.65	-0.21
South Mainland	0.84	1.12	-0.28
West Mainland	0.30	0.60	-0.30
Yell	0.19	0.12	0.07
Unst	0.36	0.55	-0.19
Fetlar	0.11	0.11	0.00
Whalsay	0.03	0.09	-0.06
Out Skerries	0.01	0.03	-0.02
Bressay	0.07	0.05	0.02
Fair Isle	0.32	0.16	0.16
Papa Stour	0.01	0.01	0.00
Foula	0.03	0.01	0.02
Total	**5.8**	**6.8**	**-1.0**

From the table above it can be seen that overall average length of stay figures have fallen. They have also fallen in eight of the areas identified including all areas of the Mainland. Two areas have the same average length of stay these being Fetlar and Papa Stour at 0.11 and 0.01 nights respectively. For areas have seen a rise in their average stay figures the greatest of these being in Fair Isle from 0.16 to 0.32 nights. Overall the top Non-Mainland and two top Mainland areas remained the same, although all 3 have seen a reduction in their average stay figures. The Mainland area with the largest decrease in average stay was the West Mainland down from 0.6 to 0.3 nights. For the Non-Mainland it was Unst down from 0.55 to 0.36 nights. Overall and when viewed in conjunction with increased visitor numbers, and the trend toward Shetland as a second holiday area, this might suggest that visitors in general are making more trips (not necessarily all to Shetland), but these trips are of a shorter duration.

Table 6.12 Areas Visited by Group %

	Scot	UK	OS	Hol	Busi	VFR	Total
Lerwick	96	96	98	99	93	98	97
Central Mainland	90	93	90	93	89	94	91
North Mainland	52	71	63	74	43	67	61
South Mainland	81	84	73	79	87	77	80
West Mainland	26	41	35	42	20	42	33
Yell	24	41	34	44	16	34	32
Unst	17	38	31	43	10	26	27
Fetlar	3	6	2	6	2	3	4
Whalsay	5	4	2	4	4	5	4
Out Skerries	1	2	1	2	1	1	1
Bressay	7	19	17	20	4	16	13
Fair Isle	1	4	1	4	2	0	2
Papa Stour	1	1	2	2	0	1	1
Foula	1	1	0	2	0	2	1

From the table above it can be seen that overall Mainland areas are visited more than Non-Mainland areas the most visited areas both overall and by group for both Mainland and Non-Mainland areas were the same being in order:-

Mainland
- Lerwick
- Central Mainland

Non-Mainland
- Yell
- Unst
- Bressay

Table 6.13 Number of Areas Visited by Group

	Scot	UK	OS	Hol	Busi	VFR	Total
1	6	3	6	5	5	2	5
2-3	39	19	28	19	50	21	30
4-5	37	39	35	33	35	48	37
6-10	18	38	30	42	10	29	27
Over 10	0	1	1	1	0	0	1
Average	**4.0**	**5.0**	**4.6**	**5.1**	**3.7**	**4.7**	4.5

From the table above it can be seen that overall the most frequent number of places visited was 4-5 at 37% with 67% visiting between 1 and 5 areas. There are variations within the groups, with Scottish and business visitors appearing to visit less areas within the islands. As 71% of business visitors are Scottish this is not surprising. Those visitors who visit most areas are on holiday with the highest proportion 42% visiting 6-10 areas. Overall visitors visited an average of 4.5 areas, with the highest average being 5.1 areas for holiday visitors and the lowest 3.7 areas for business visitors.

Table 6.14 Average Areas Visited by Group

	Scot	UK	OS	Hol	Busi	VFR	Total
Average 2006	4.0	5.0	4.6	5.1	3.7	4.7	4.5
Average 2000	4.0	4.8	4.3	4.8	3.5	4.8	4.3
Difference	**0.0**	**0.2**	**0.3**	**0.3**	**0.2**	**-0.1**	**0.2**

From the table above it can be seen that overall the number of areas visited has risen by 0.3 since 2000. The only group where average areas visited has fallen is VFR which has dropped from 4.8 to 4.7. Areas visited by Scottish visitors has remained the same at 4.0. Areas visited by other groups have risen the largest of these being overseas and holiday visitors who have both increased by 0.3, to 4.6 and 5.1 respectively.

7. Expenditure

Table 7.1 Average Spend Per Person Per Trip (£)

	2006	2000	Difference
Travel to Shetland from Departure Point	189	223	-34
Accommodation (inc food & drink provided)	87	90	-3
Travel costs on the islands	33	46	-13
Food and drink (not inc in accommodation)	53	44	9
Package trips	72	40	32
Tourist Shopping	23	20	3
Entertainment and Recreation	8	14	-6
Other Shopping*	12		
Miscellaneous Items*	2	11	3
Total Spending both on and off islands	**480**	**488**	**-8**
Total Spending on Shetland	**255**	**245**	**10**

*Other shopping was split out of miscellaneous items in 2006, combined total £14 = increase of £3 overall

All visitors were asked what they had spent on their trip to Shetland on a variety of items. As this was an exit survey with interviews occurring at the end of a trip actual totals for each of the items above were requested. Total Shetland expenditure excludes travel to Shetland and half of package figure for comparison to 2000 figures.

Many visitors found it difficult to answer the question in relation to travel costs to and from Shetland, as many of them were on route to other areas as part of a larger trip, and therefore apportionment of costs was not easy. However the question asked is a simplification of an even more complex standard visitor survey question requiring travel costs to and from home. This standard question had proved to complex and unsatisfactory both in other island settings and in the previous 2000 survey in Shetland. Therefore the adaptation to measure the cost of travel to and from the Mainland departure point was asked. Thus results for this question are not directly comparable to some other surveys, but both give a more accurate reflection of travel costs to and from Shetland, and are comparable to the 2000 figures.

From the table above it can be seen that overall travel cost to and from the islands have fallen from £223 in 2000 to £189 in 2006, a drop of £34. This may reflect both improved travel offers from transport providers particularly for sea travel from Mainland Scotland that has seen the most significant increase in passenger numbers. It is also possible that travellers are now more likely to seek out better deals, particularly given the rise in second holidays.

In terms of accommodation spend this has remained fairly static falling £3 between 2000 and 2006 down from £90 to £87. This most likely reflects the reduction in average trip length which has fallen by a night, rather than a reduction in accommodation prices.

Travel costs whilst on the islands have fallen from £46 in 2000 to £33 in 2006 a drop of £13. This may again reflect reduced trip length, but this is perhaps less likely given that there has been an average increase in the number of areas visited per trip of 0.2. It is possible that it may reflect greater use of public transport, however as mode of travel was omitted from the 2006 survey it has not been possible to verify this.

There has been an increase in food and drink purchases up from £44 in 2000 to £53 in 2006, a rise of £9. Which may reflect increased prices and/or higher levels of eating out, given reduced trip length.

There has been a significant increase in package trip costs up from £40 in 2000 to £72 in 2006, a rise of £32. As is shown in the following table this is due to increased package tour activity among holiday visitors.

There has been an increase in tourism shopping up from £20 in 2000 to £23 in 2006, a rise of £3. Which may reflect increased prices and/or higher levels of tourism shopping, given reduced trip length.

There has been a fall in entertainment and recreation spend down from £14 in 2000 to £8 in 2006, a fall of £6. This may again reflects the reduction in average trip length, rather than a reduction in entertainment prices. It is also possible that might be some cross over between entertainment/recreation and packages which has risen significantly, with both predominantly driven by holiday visitors.

There has been an increase in other shopping and miscellaneous items up from £11 in 2000 to £14 in 2006, a rise of £3. Again this may reflect increased prices and/or higher levels of these types of shopping, given reduced trip length.

Overall there has been a fall in the total spend of visitors both on and off the islands down from £488 in 2000 to £480 in 2006, a fall of £8. This is entirely due to falls in travel costs to, from and on the islands, predominantly to and from. As previously stated this may reflect both improved travel offers from transport providers particularly for sea travel from Mainland Scotland that has seen the most significant increase in passenger numbers. It is also possible that travellers are now more likely to seek out better deals, particularly given the rise in second holidays.

Overall there has been a rise in the total spend of visitors whilst on the islands up from £245 in 2000 to £255 in 2006, a rise of £10. This may not seem a significant amount given the time span between the two surveys however it should be remembered that average trip length has fallen by 1 night and if these figures are examined as a nightly/daily spend the average has increased from £36 per night to £44 per night, a rise of £8 or 22%.

Table 7.2 Average Spend by Type of Visitor Per Person Per Trip (£)

	Package	Travel To Shet	Travel On Shet	Accom	Food & Drink	Ent & Rec	Tour Shop	Other Shop	Misc	Total Spend	Total in Shetland	Total Spend 2000	Spend Shetland 2000	Difference Total Spend	Difference Shetland Spend
Trip Purpose															
Holiday	172	130	31	79	48	12	30	6	2	510	294	434	237	76	57
Business	1	268	41	129	55	2	10	6	2	514	246	523	258	-9	-13
VFR	4	166	25	31	61	9	30	34	4	364	196	395	195	-31	1
Origin															
Scotland	10	193	30	92	51	6	16	17	5	420	222	407	203	13	19
Other UK	55	187	36	89	57	8	25	7	2	466	252	522	268	-56	-17
Overseas	211	166	32	70	52	8	32	12	3	586	315	432	237	154	78
Age															
Under 24	15	110	18	46	54	7	24	9	3	286	169	362	189	-76	-21
25-55	23	198	37	97	54	6	18	15	2	450	241	477	247	-27	-7
Over 55	158	185	29	73	52	8	29	9	5	548	284	491	252	57	32
First Visit															
First Visit	116	164	32	90	48	8	23	7	2	490	268	446	241	44	27
Repeat Visit	23	208	33	78	58	6	22	19	5	452	233	461	229	-9	4
Length of Stay															
Day Trip	51	191	11	0	12	1	3	2	0	271	55	219	33	52	22
1-3 Nights	122	191	22	57	28	3	15	17	1	456	204	401	166	55	38
4-7 Nights	27	170	39	94	65	10	29	8	2	444	261	472	266	-28	-6
Over 8 nights	42	200	55	167	108	13	37	17	11	650	429	591	371	59	58
Main Accommodation															
Hotel/Guest House	172	241	36	134	48	6	23	4	2	666	339	579	308	87	31
B&B	16	159	14	113	67	11	30	12	2	424	257	454	262	-30	-5
Self Catering	1	187	11	168	89	10	32	9	4	511	324	582	374	-71	-51
Hostel/Bod	4	89	4	52	37	7	16	2	1	212	121	336	162	-124	-41
Camping	0	118	4	17	42	7	13	3	0	204	86	321	186	-117	-100
VFR/Own House	0	117	13	7	60	9	28	38	9	281	164	342	148	-61	16
All Visitors	72	189	33	87	53	8	23	12	2	480	255	488	245	-8	10

From the table above it can be seen that on average holiday travellers spend more on package trips, entertainment and recreation, business travellers more on travel to, from and on Shetland and accommodation, and VFR visitors more on food and drink, tourism shopping, other shopping and miscellaneous items. In terms of total spend business travellers spent most at £514, and in terms of Shetland spend holiday travellers spent most at £294. This shows a shift from 2000, when business travellers had the highest average spend both overall and within Shetland. The largest increase in average spend both overall and within Shetland was for holiday travellers.

On average Scottish travellers spend more on travel to and from Shetland, accommodation, other shopping and miscellaneous items, other UK visitors more on travel on Shetland, entertainment and recreation, and food and drink, and overseas visitors spend more on packages, entertainment and recreation and tourism shopping. In terms of total spend overseas travellers spent most both overall and within Shetland at £586, and £315 respectively. This shows a shift from 2000, when other UK travellers had the highest average spend both overall and within Shetland. The largest increase in average spend both overall and within Shetland was for overseas travellers.

On average travellers aged under 24 spend more on food and drink, 25-55 year olds more on travel to, from and on Shetland, accommodation, and food and drink, and travellers over the age of 55 spend more on packages, entertainment and recreation, tourism shopping and miscellaneous items. In terms of total spend travellers over the age of 55 spent most both overall and within Shetland at £548, and £284 respectively. This shows a no change from 2000, when other travellers over the age of 55 also had the highest average spend both overall and within Shetland. The largest increase in average spend both overall and within Shetland was also for travellers over the age of 55.

On average first time visitors spend more on packages, accommodation, entertainment and recreation and tourism shopping, and repeat visitors more on travel to, from and on Shetland, food and drink, other shopping and miscellaneous items. In terms of total spend first time visitors spent most both overall and within Shetland at £490, and £268 respectively. This shows a shift from 2000, when other repeat visitors had the highest average spend overall and first time visitors the highest within Shetland. The largest increase in average spend both overall and within Shetland was for first time visitors.

On average visitors staying 1-3 nights spend more on packages, and entertainment and recreation. Those staying over 8 nights spend most in all other categories and also entertainment and recreation as well. It terms of total spend first time visitors spent most both overall and within Shetland at £490, and £268 respectively. This shows a no change from 2000, when visitors staying over 8 nights also had the highest average spend both overall and within Shetland. The largest increase in average spend both overall and within Shetland was also for visitors staying over 8 nights.

On average travellers staying in hotels and guesthouses spend more on packages and travel to and from Shetland, food and drink, 25-55 year olds more on travel to, from and on Shetland, those staying in B&B's spend more on entertainment and recreation, those in self-catering accommodation more on accommodation, food and drink and tourism shopping, and those visiting friends and relatives, or in their own property more on other shopping and miscellaneous items. In terms of total spend hotel/guest house visitors spent most both overall and within Shetland at £666, and £339 respectively. This shows a shift from 2000, when self-catering visitors had the highest average spend both overall and within Shetland. The largest increase in average spend both overall and within Shetland was for hotel/guest house visitors.

Table 7.3 Average Spend by Visitor Type & Other Key Indicators

	Av Spend in Shetland Per Trip	Av Length Of Stay in Shetland	Av Spend Per Person Per Day	Av Party Size	Av Spend Per Party Per Trip
Trip Purpose					
Holiday	294	4.7	62.55	2.12	623
Business	246	5.8	42.41	1.46	359
VFR	196	7.6	25.79	1.78	349
Origin					
Scotland	222	4.4	50.45	1.74	386
Other UK	252	6.6	38.18	1.84	464
Overseas	315	7.0	45.00	2.09	658
Age					
Under 24	169	6.7	25.22	1.62	274
25-55	241	5.5	43.82	1.89	455
Over 55	284	6.1	46.56	1.77	503
First/Repeat Visit					
First Visit	268	5.3	50.57	2.01	539
Repeat Visit	233	6.4	36.41	1.69	394
Length of Stay					
Day Trip	55	0.0	55.00	2.19	120
1-3 Nights	204	2.0	102.00	1.68	343
4-7 Nights	261	5.4	48.33	2.01	525
Over 8 nights	429	17.8	24.10	1.84	789
Main Accommodation					
Hotel/Guest House	339	4.1	82.68	1.71	580
B&B	257	4.8	53.54	1.68	432
Self Catering	324	10.2	31.76	2.57	833
Hostel/Bod	121	4.9	24.69	1.83	221
Camping	86	5.2	16.54	2.15	185
VFR/Own House	164	8.8	18.64	1.61	264
Total					
All Visitors	**255**	**5.8**	**43.97**	**1.85**	**472**

From the table above it can be seen that holiday travellers were highest in terms of average spend in Shetland per person per trip, average spend per person per day, average party size and average spend per party per trip at £294, £62.55, 2.12 people and £623 respectively. VFR visitors had the highest average length of stay at 7.6 nights.

Overseas travellers were highest in terms of average spend in Shetland per person per trip, average length of stay, average party size and average spend per party per trip at £315, 7 nights, 2.09 people and £658 respectively. Scottish visitors had the highest average spend per person per day at £50.45.

Travellers aged over 55 were highest in terms of average spend in Shetland per person per trip, average spend per person per day and average spend per party per trip at £284, £46.56 and £503 respectively. 25-55 year olds had the highest average party size at 1.89 people and under 24 year olds the highest average length of stay at 6.7 nights.

First time visitors were highest in terms of average spend in Shetland per person per trip, average spend per person per day, average party size and average spend per party per trip at £268, £50.57, 2.01 people and £539 respectively. Repeat visitors had the highest average length of stay at 6.4 nights.

Visitors staying more than eight days were highest in terms of average spend in Shetland per person per trip, average length of stay and average spend per party per trip at £429, 17.8 days and £789 respectively. Those staying 1-3 nights had the highest average spend per person per day at £102 and day trippers the highest average party size at 2.19 people.

Self-catering visitors were highest in terms of average length of stay, average party size and average spend per party per trip at 10.2 days, 2.57 people and £833 respectively. Those staying in a hotel/guest house had the highest average spend in Shetland per person per trip, and average spend per person per day at £339 and £82.68.

Overall the average spend in Shetland per person per trip was £255, length of stay 5.8 nights, average spend per person per day £43.97, average party size 1.85 people and average spend per party per trip £472.

Table 7.4 Average Spend by Visitor Comparison to Other Areas (£)

	Shetland	Orkney	Western Isles
Travel to Area from Departure Point	189	99	186
Accommodation (inc food & drink provided)	87	94	73
Travel costs on the islands	33	17	24
Food and drink (not inc in accommodation)	53	49	38
Package trips	72	No Data	46
Tourist Shopping	23	32	27
Entertainment and Recreation	8	15	9
Other Shopping*	12	*	*
Miscellaneous Items*	2	9	9
Total Spending both on and off islands	**480**	**311**	**412**
Total Spending in Area	**255**	**209**	**203**

*Other shopping was split out of miscellaneous items for Shetland in 2006, Orkney and Western Isles figures are combined

It should be noted that these figures do not compare the same season, and the Western Isles survey in particular was conducted some time ago. From the table above however it can be seen that average spend levels for the Shetland survey were higher, but that within this Orkney visitors on average spent more on accommodation, all forms of shopping and entertainment and recreation. Western Isles travellers around the same on transport to and from the area, however as transport costs to and from Shetland have dropped since the last survey it is possible that something similar may have also happened in the Western Isles.

8. Accommodation

Table 8.1 Types of Accommodation Used

	2006%		2000%		Difference%	
	Main Accom	All Used	Main Accom	All Used	Main Difference	All Difference
Hotel	28.9	31.5	35.1	37.7	-6.2	-6.2
GH	9.2	10.4	10.2	12.4	-1.0	-2.0
B&B	12.1	14.9	10.4	13.0	1.7	1.9
Self Catering	7.3	7.7	6.7	7.3	0.6	0.4
Hostel	5.3	7.4	3.7	5.4	1.6	2.0
Camping Bods	1.0	2.2	0.7	1.7	0.3	0.5
VFR	18.7	19.8	21.0	22.7	-2.3	-2.9
Second Home	0.8	1.1	0.8	1.1	0.0	0.0
Yacht/Boat	0.2	0.2	1.4	1.4	-1.2	-1.2
ALL CAMPING	**4.4**	**6.1**	**3.3**	**3.7**	**1.1**	**2.4**
Camper van/Caravan	1.5	1.5	1.1	1.1	0.4	0.4
Tent	0.2	0.3	2.2	2.6	0.7	2.0
Campsite	2.2	3.0				
Wild camping	0.5	1.3				
Other	4.1	4.1	1.8	2.3	2.3	1.8
None/No response	8.0	8.0	4.7	4.7	3.3	3.3

From the table above it can be seen that the top 3 most frequently used accommodation both in the main and overall remain the same hotels, VFR and B&B, although there has been a proportionate drop of 6.2% in hotel usage, a drop of 2.3% to 2.9% in VFR usage and a rise of 1.7% to 1.9% B&B usage since 2000. It should be noted however that as overall visitor numbers have risen this does not directly translate to a drop/rise in the number of visitor using these types of accommodation. The most significant proportionate drops in terms of usage were for hotels and VFR, and the most significant rises for B&B, hostels and camping. Camping was analysed in greater detail in 2006 than 2000 and overall there would appear to have been a significant proportionate growth in this market, with proportionate growth in all types of camping activity.

Table 8.2 Main Types of Accommodation Used by Origin

	Scot%	UK%	OS%
Hotel	31	26	26
GH	10	7	10
B&B	10	12	16
Self Catering	7	8	7
Hostel	4	4	11
Camping Bods	1	1	2
Tent	0	0	1
Camper van/Caravan	0	4	1
Campsite	1	3	4
Wild camping	0	1	1
Yacht/Boat	2	2	2
VFR	21	22	10
Second Home	1	1	0
Other	3	1	2
No response	10	6	8

From the table above it can be seen that Scottish and UK visitors are most likely to be staying in a hotel or VFR, and overseas visitors a hotel, B&B or hostel. Interestingly campers are most likely to come from outwith Scotland.

Table 8.3 Main Types of Accommodation Used by Origin 2000 Comparison

	2006%			2000%			Difference%		
	SC	UK	OS	SC	UK	OS	SC	UK	OS
Hotel/Guest House	41	34	36	45	36	35	-4	-2	1
B&B	10	12	16	9	11	19	1	1	-3
VFR/Own Property	21	23	10	21	23	7	0	0	3
Self-Catering	7	8	7	8	10	6	-1	-2	1
Camping	2	8	6	2	6	11	0	2	-5
Hostel/Camping Bod	4	5	13	3	4	13	1	1	0

From the table above it can be seen that the main pattern of accommodation usage by origin remains the same for all groups from 2000 to 2006. The most significant proportionate changes have been drops in hotel/guest house usage for Scottish and UK visitors, and camping for overseas. Again it should be noted that as overall visitor numbers have risen this does not directly translate to a drop in the number of visitor using these types of accommodation.

Table 8.4 Main Types of Accommodation Used by Purpose

	Hol%	Busi%	VFR%
Hotel	29	44	5
GH	10	11	3
B&B	18	10	5
Self Catering	10	5	7
Hostel	10	1	3
Camping Bods	2	0	1
Tent	1	0	0
Camper van/Caravan	3	0	0
Campsite	5	0	0
Wild camping	1	0	0
Yacht/Boat	1	4	0
VFR	3	4	72
Second Home	0	1	2
Other	1	4	0
No response	5	14	1

From the table above it can be seen that holiday visitors are most likely to be staying in a hotel or B&B, Business visitors primarily hotel, but also guest house or B&B, and VFR to be staying with friends and relatives. Interestingly all campers were on holiday.

Table 8.5 Main Types of Accommodation Used by Purpose 2000 Comparison

	2006%			2000%			Difference%		
	Hol	Busi	VFR	Hol	Busi	VFR	Hol	Busi	VFR
Hotel/Guest House	39	56	7	33	61	7	6	-5	0
B&B	18	10	5	18	9	4	0	1	1
VFR/Own Property	3	5	74	9	5	79	-6	0	-5
Self-Catering	10	5	7	11	4	7	-1	1	0
Camping	11	0	1	11	0	1	0	0	0
Hostel/Camping Bod	12	1	4	10	3	1	2	-2	3

From the table above it can be seen that the main pattern of accommodation usage by purpose remains the same for all groups from 2000 to 2006. The most significant proportionate changes have been drops in hotel/guest house usage for business visitors and a rise for holiday makers, as well as falls in VFR/own property for VFR and holiday visitors. Again it should be noted that as overall visitor numbers have risen this does not directly translate to a rise/drop in the number of visitor using these types of accommodation

Hotel/Guest House users are more likely to be :-
- Male (59%)
- Aged between 25 and 55 (56%)
- Social class C1 (38%)
- Air travellers (56%)
- Visit during the high season (60%)
- Be visiting on business (52%)
- Be a first time visitor (54%)
- Stay 1-3 nights (65%)
- Stay at least 1 night in Lerwick (82%)
- Come from Scotland (48%)

B&B users are more likely to be :-
- Male (57%)
- Aged between 25 and 55 (56%)
- Social class (46%)
- Sea travellers (64%)
- Visit during the high season (59%)
- Be visiting on holiday (60%)
- Be a first time visitor (70%)
- Stay 1-3 nights (55%)
- Stay at least 1 night in Lerwick (76%)
- Come from Scotland (38%)

VFR/Own Property users are more likely to be :-
- Female (56%)
- Aged between 25 and 55 (45%)
- Social class C1 (46%)
- Air travellers (55%)
- Visit during the high season (54%)
- Be visiting friends and relatives (84%)
- Be a repeat visitor 79%
- Stay 4-7 nights (47%)
- Stay at least 1 night outwith Lerwick (67%)
- Come from Scotland (49%)

Self-catering users are more likely to be :-
- Male (55%)
- Aged between 25 and 55 (49%)
- Social class C1 (42%)
- Sea travellers (53%)
- Visit during the high season (60%)
- Be visiting on holiday (56%)
- Be a first time visitor (52%)
- Stay more than 8 nights (48%)
- Stay at least 1 night outwith Lerwick (51%)
- Come from Scotland (42%)

Camp users are more likely to be :-

- Male (51%)
- Aged between 25 and 55 (54%)
- Social class C1 (39%)
- Sea travellers (98%)
- Visit during the high season (81%)
- Be visiting on holiday (92%)
- Be a first time visitor (88%)
- Stay 1-3 nights (42%)
- Stay at least 1 night in Lerwick (69%)
- Come from other areas of the UK (53%)

Hostel/Bod users are more likely to be :-

- Male (54%)
- Aged between 25 and 55 (66%)
- Social class C1 (50%)
- Sea travellers (88%)
- Visit during the high season (67%)
- Visiting on holiday (76%)
- A first time visitor (80%)
- Stay 1-3 nights (51%)
- Stay at least 1 night in Lerwick (79%)
- Come from Overseas (45%)

Table 8.6 Advanced Booking %

	ALL	Hotel /GH	B&B	VFR/ Own	SC	Camp	Host /Bod	Stay 1-3	Stay 4-7	Stay 8+
Not Applicable	**31**	4	1	89	4	22	4	14	28	47
Yes – All of it	**53**	85	76	2	85	18	53	68	53	39
Yes - Some of it	**3**	3	6	0	0	7	13	2	5	4
No - None of it	**11**	8	17	3	11	53	30	14	12	7
No response	**3**	0	0	7	0	0	0	2	2	3
	Scot	Other UK	OS	NL	SM	AIR	Hol	Busi	High	Low
Not Applicable	31	35	23	30	32	31	14	25	33	29
Yes – All of it	53	50	53	47	45	60	64	62	48	55
Yes - Some of it	3	3	4	4	3	2	5	1	3	3
No - None of it	9	9	19	16	16	6	16	9	11	11
No response	3	3	1	3	3	2	1	3	5	1

From the table above it can be seen that overall 53% of visitors booked all their accommodation prior to arrival. 31% stated this was not applicable and this includes those with their own property, VFR and day trippers, which is highlighted by the fact that 89% of own property and VFR visitors stated this question was not applicable. Within the breakdown in the table it can be seen that the majority of visitors when examined by main accommodation usage book in advance ranging from 85% for hotels, guest houses and self-catering to 53% for hostels and bods. The exception to this is campers where 53% do not book. In terms of length of stay the majority of those staying under a week booked in advance, but the proportion feel as the length of stay increased with those staying over 8 nights in the main stating this was not applicable, although 39% of these still booked all accommodation in advance. The breakdown by origin, exit route, purpose of visit and season all show the majority of travellers booking in advance. Scots and Overseas visitors were slightly more likely to book in advance, than those from the rest of the UK, as were air as opposed to sea travellers, and those travelling in the low rather than the high season. Business and holiday visitors were fairly evenly matched at 62% and 64% respectively.

Table 8.7 Non-Bookers 2000 Comparison %

	ALL	Hotel /GH	B&B	VFR/ Own	SC	Camp	Host /Bod	Stay 1-3	Stay 4-7	Stay 8+
2006	**11**	8	17	3	11	53	30	14	12	7
2000	**11**	10	21	No data	12	83	31	17	18	21
Difference	**0**	-2	-4		-1	-30	-1	-3	-6	-14
	Scot	Other UK	OS	NL/ P&O	SM	AIR	Hol	Busi	High	Low
2006	9	9	19	16	16	6	16	9	11	11
2000	14	16	24	21	19	13	20	15	19	16
Difference	-5	-7	-5	-5	-3	-7	-4	-6	-8	-5

From the table above it can be seen that although overall the proportion of visitors not booking in advance has not altered, when broken down by group there has been a proportionate fall overall in all categories. The most significant of these is camping where visitors are now 30% more likely to book in advance than they were in 2000.

Table 8.8 Length of Advanced Booking %

	ALL	Hotel /GH	B&B	VFR/ Own	SC	Camp	Host /Bod	Stay 1-3	Stay 4-7	Stay 8+
Just turned up	**7**	4	13	3	3	38	17	9	8	4
Less than 1	**10**	16	13	0	3	3	19	16	6	2
1-2 weeks	**10**	16	16	0	8	7	10	17	6	5
2-4 weeks	**7**	10	12	0	8	6	4	9	7	4
1-2 months	**8**	12	11	0	16	1	10	9	10	7
2-4 months	**9**	12	16	1	19	6	7	7	11	11
More than 4 mth	**9**	16	7	1	30	3	1	8	13	11
NA/no response	**40**	13	12	95	13	38	31	26	38	56
	Scot	Other UK	OS	NL	SM	AIR	Hol	Busi	High	Low
Just turned up	6	7	10	13	0	2	11	4	5	8
Less than 1	13	5	8	7	0	14	5	21	10	9
1-2 weeks	14	8	5	8	0	14	7	20	12	9
2-4 weeks	9	5	3	5	1	9	5	12	8	6
1-2 months	9	8	5	9	0	9	11	7	9	8
2-4 months	5	13	10	11	0	7	15	3	7	10
More than 4 mth	5	14	12	11	0	10	19	1	7	11
NA/no response	38	41	47	36	99	35	28	33	43	40

From the table above it can be seen again that overall 53% of visitors booked all their accommodation prior to arrival. 40% stated this was not applicable and this includes those with their own property, VFR and day trippers, which is highlighted by the fact that 95% of own property and VFR visitors stated this question was not applicable. The timing of advanced bookings was relatively evenly spread with slightly more booking less than 2 weeks before arrival. Within the breakdown in the table it can be seen that the majority of visitors when examined by main accommodation booking patterns differed according to accommodation type with camp, bod and hostel visitors more likely to just turn up and hotel, guest house and self-catering visitors most likely to book more than 4 months in advance. In terms of length of stay the proportion of those booking further in advance rose as the length of stay increased. The breakdown by origin shows that a proportion of overseas visitors were most likely to just turn up, 1 in 10, and that other UK and overseas visitors were also more likely to book more than 4 months in advance than Scots visitors where more than 1 in 4 booked less than 2 weeks in advance. It is likely this reflects the higher numbers of Scots business travellers. In terms of exit route, there was insufficient data collected from Smyril passengers to make any meaningful analysis, however although Northlink travellers are more likely to just turn up than air passengers, there was also a significant proportion booking more than 2 months in advance as opposed to less than 2 weeks in advance for air. This again highlights the business/holiday traveller divide between Northlink and air travellers, with air more likely to be business, this is further shown by the purpose of trip data which shows holiday travellers more likely to book more than 2 months in advance and business travellers less than 2 weeks. In terms of season somewhat surprisingly there were proportionately more long term bookings in the low season.

Table 8.9 How Accommodation was Booked %

	ALL	Hotel /GH	B&B	VFR/ Own	SC	Camp	Host /Bod	Stay 1-3	Stay 4-7	Stay 8+
Did not book	**6**	3	7	3	2	40	16	8	7	3
Someone else	**17**	33	12	0	18	0	11	26	10	13
Internet	**9**	10	18	0	16	6	21	9	13	6
Travel Agent	**5**	13	2	0	1	1	0	9	4	3
TIC	**2**	2	8	1	5	4	0	2	3	2
Provider Direct	**26**	30	49	2	51	26	41	27	32	23
Other	**1**	3	0	0	0	0	1	2	1	0
NA/no response	**34**	5	5	94	7	22	9	17	30	50
	Scot	Other UK	OS	NL	SM	AIR	Hol	Busi	High	Low
Did not book	4	6	10	9	17	2	10	2	3	8
Someone else	21	13	13	10	6	26	8	37	16	17
Internet	6	7	17	10	17	5	17	2	8	9
Travel Agent	3	6	9	5	9	5	11	3	3	7
TIC	2	2	4	2	5	2	4	1	3	2
Provider Direct	28	27	19	27	12	26	32	25	26	25
Other	1	2	2	2	2	1	3	0	0	2
NA/no response	36	38	25	35	31	34	15	29	40	29

From the table above it can be seen that 34% stated this was not applicable. This includes those with their own property, VFR and day trippers, which is highlighted by the fact that 94% of own property and VFR visitors stated this question was not applicable. In the main accommodation was booked either direct with the provider, or by someone else. When examined by main accommodation booking patterns differed according to accommodation type with B&B bod, hostel and self-catering visitors more likely to book direct with the provider, hotel and guest house visitors more likely to have their accommodation booked by someone else, and campers are most likely not to book.

In terms of length of stay all were most likely to book through the provider although those staying longer were more likely to fall into the not applicable category, and those staying for shorter periods more likely to have someone else book their accommodation.

The breakdown by origin shows that of those who felt the question was applicable, the highest numbers booked direct through the provider, however Scots visitors were more likely to have someone else book for them, and overseas to use the internet. It is likely again that this reflects the higher numbers of Scots business travellers.

In terms of exit route of those who felt the question was applicable, most Northlink passengers booked direct with the provider, Smyril either via the internet or did not book, and air travellers were evenly matched for direct through the provider and someone else booking their accommodation, again this most likely reflects higher levels of business air travel, as shown in the holiday/business split, where holiday makers are more likely to book through a provider, and business travellers have someone else book their accommodation. In terms of season again for those who felt the question was applicable, most had booked through the provider.

The survey also asked for internet booking information overall 9% of travellers booked accommodation through the internet and they were proportionately most likely to be:-

- Staying in a hostel or bod (21%)
- Staying between 4 and 7 days (13%)
- An overseas visitor (17%)
- A Smyril traveller (17%)
- A holiday maker (17%)
- Travelling in the low season (9%)

9. Sources of Information/Inspiration

Table 9.1 Information Sources Used Prior to Arrival %

	All	Scot	Other UK	OS	Hol	Busi	VFR
Internet/websites	**48**	39	50	64	65	35	38
Tourist Board brochure/leaflets	**22**	14	29	30	38	8	13
Tourist Information Centre	**9**	6	12	12	16	5	5
Travel Agent	**6**	3	5	12	10	3	4
Travel Operators	**6**	5	7	7	9	3	4
Guidebooks	**18**	8	22	32	36	4	9
Friends/Relatives/Others	**24**	23	27	21	21	11	50
None Someone Else Organised	**26**	38	19	10	7	47	25
Other	**5**	3	7	6	7	4	3

From the table above it can be seen that the most frequently used information source overall was the internet, with 48% stating they had used it to find out about Shetland prior to visiting. The next two most frequent were none as someone else organised the trip and friends and relatives at 26% and 24% respectively. When assessed by origin the most frequent again was the internet ranging from 39% for Scotland to 64% for overseas. There were also a high proportion of Scots who had someone else organise their trip, 38% and this coupled with the trip purpose breakdown which shows business travellers in the main have someone else organise their trip, 47% again highlights higher Scots business travel. Holiday makers most frequently used the internet 65%, and VFR visitors most frequently got information from friends and relatives. This analysis shows that although the levels of travellers booking accommodation on-line were relatively low at 9% the majority of travellers use the internet to research the islands prior to visiting and even for business and VFR travellers where other information sources were proportionately higher, over 1 in 3 still used the internet.

Table 9.2 Information Sources Used Prior to Arrival Comparison 2000 %

	2006	2000	Difference
Internet/websites	48	6	**42**
Tourist Board brochure/leaflets	22	14	**8**
Tourist Information Centre	9	11	**-2**
Travel Agent	6	2	**4**
Travel Operators	6	2	**4**
Guidebooks	18	3	**15**
Friends/Relatives/Others	24	11	**13**
None Someone Else Organised	26	16	**10**
Other	5	2	**3**

The table above shows a significant rise in internet research since 2000 when only 6% of visitors used the internet for research as opposed to 48% in 2006, a rise of 42%. There would also appear to be an overall general increase in research prior to visit since 2000, as usage of all the information options provided rose apart from the TIC, although this might reflect more hands on research being undertaken by travellers themselves.

Table 9.3 Internet Research and Booking %

	Research	Booked
Accommodation	23	10
Transport to Shetland	34	23
Transport on Shetland	9	3
Visitor Centres/Attractions	11	0
Activities	9	0
Events	7	0
History/Culture	13	0
Natural History	11	0
Other	4	0
Not Applicable/No response	2	74

Those who stated they had used the internet in planning their visit were asked for details in relation to areas researched and booked. From the table above it can be seen that the most frequently researched and booked aspects of the trip was transport with over 1 in 3 researching on line and around 1 in 4 booking. Accommodation ranked second with around 1 in 4 researching and 1 in 10 booking. The only other area booked on-line was transport on Shetland. The most frequently researched among the other options given were history, culture, nature, visitor centres and attractions.

Respondents were also asked if they could remember which websites they had used, the most frequently mentioned were:-

- Visit Shetland
- Visit Scotland
- Fair Isle Bird Observatory
- Northlink
- BA
- Atlantic Airways
- Google

Other sites mentioned included:-

- Amenity Trust
- Bolts car hire
- Fair Isle
- Folk Festival
- Geo tours
- Guest House/BB Site
- HIAL
- Historic Scotland
- Kayak Shetland
- Leasks
- Lerwick Hotel
- LPA
- Shetland Today/Times
- Shetland Wildlife Tours
- SIC
- Smyril
- Spiders Web
- Unst
- Valhalla Brewery

Table 9.4 Inspiration to Visit %

	All	Scot	Other UK	OS	Hol	Busi	VFR
Work/Business/Meetings etc	**32**	51	18	10	0	87	1
VFR	**15**	15	19	9	4	1	60
Birds/Wildlife/Nature/Flora	**8**	3	12	14	17	1	3
Peace and quiet, remoteness	**5**	1	7	10	10	1	3
Scenery/Landscape	**4**	2	4	10	10	0	2
Love of islands/island hopping	**4**	2	5	5	9	0	0
Location/Furthest North	**4**	3	4	4	6	1	2
History, archaeology, vikings etc	**3**	1	4	5	6	1	0
Culture/Up Helly Aa/People	**3**	4	2	3	4	1	6
Historic family connection	**3**	1	4	4	4	0	5
Sport	**3**	3	3	3	5	0	1
In transit/travel connections	**2**	1	4	4	4	0	1
Wedding/Party	**2**	4	1	0	0	0	10
Adventure/curiosity/f/experience	**2**	1	3	4	5	0	1
No response	**2**	2	1	2	1	3	2
Other	**2**	1	1	2	2	1	2
Recommendation/advertising/literature	**1**	1	2	3	3	0	1
Part of Scotland/UK	**1**	1	1	2	3	0	0
Music inc Festivals and Fiddle Frenzy	**1**	1	1	1	2	0	0
Shetland Pony	**1**	1	0	1	1	0	1
Always wanted to come	**1**	0	1	0	1	0	0
Walking	**0**	0	1	0	1	0	1
Knitting/Wool	**0**	0	0	2	1	0	0
Part of tour	**0**	0	0	2	1	0	0
Geology	**0**	0	0	1	1	0	0

From the table above it can be seen that overall and for both Scottish and other UK visitors the main inspiration for their visit was work and VFR. Around 1 in 3 travellers stated this overall, and over 1 in 2 Scots visitors. Overall and for other UK visitors the third ranking was birds, wildlife, nature and flora, for Scots it was culture, Up Helly Aa, the people and a wedding or party. For overseas and holiday visitors the most common answer provided was birds, wildlife, nature and flora, followed by peace and quiet, remoteness and the scenery. There was also a sizeable number of overseas visitors who stated work as the main reason, 1 in 10. For business travellers the overwhelming response was work at 87%, and for VFR visitors it was VFR at 60%. Second and third ranking for VFR were culture, Up Helly Aa, the people and a wedding or party, which was similar to Scots visitors. The largest spread of inspirational reasons came from holiday and overseas visitors and the smallest from Scottish and business visitors.

Table 9.5 Inspiration to Visit Holiday Visitors %

	All	Scot	Other UK	OS	First Visit	Repeat Visit
Birds/Wildlife/Nature/Flora	**17**	11	19	17	17	18
Scenery/Landscape	**10**	9	7	13	9	12
Peace and quiet, remoteness	**10**	5	10	12	10	9
Love of islands/island hopping	**9**	11	11	6	10	3
History, archaeology, vikings etc	**6**	5	8	6	7	5
Location/Furthest North	**6**	9	6	5	7	3
Sport	**5**	10	5	4	6	5
Adventure/curiosity/f/experience	**5**	4	5	5	6	0
In transit/travel connections	**4**	2	5	5	4	5
Historic family connection	**4**	3	4	5	4	6
VFR	**4**	7	4	2	2	11
Culture/Up Helly Aa/People	**4**	8	3	3	2	9
Part of Scotland/UK	**3**	3	3	3	4	0
Recommendation/advertising/literature	**3**	1	3	3	3	2
Music inc Festivals and Fiddle Frenzy	**2**	5	3	0	2	3
Other	**2**	2	1	3	2	2
Always wanted to come	**1**	1	2	0	1	0
Part of tour	**1**	0	0	2	1	0
No response	**1**	1	1	1	1	1
Knitting/Wool	**1**	0	0	2	1	1
Shetland Pony	**1**	1	0	1	1	1
Geology	**1**	0	1	1	1	0
Walking	**1**	1	1	0	1	0
Work/Business/Meetings etc	**0**	1	0	0	0	1
Wedding/Party	**0**	2	0	0	0	1

The most important market segment to assess in terms of inspiration to visit is the holiday market. From the table above it can be seen that overall and for all groups the main inspiration for their visit was birds, wildlife, nature and flora. Overall and for other overseas visitors the second and third ranking was peace and quiet, remoteness and the scenery, for Scots it was history, archaeology and sport, and for other UK and first time visitors peace and quiet, remoteness and a love of islands and/or island hopping. For repeat visitors it was scenery, landscape and VFR. The largest spread of inspirational reasons came from first time and Scottish visitors, and the smallest from repeat and other UK and overseas visitors.

Table 9.6 Marketing Influences to Visit%

	All	Scot	Other UK	OS	Hol	Busi	VFR
Other	**45**	53	41	30	30	74	22
Advice from friends and relatives	**19**	16	24	18	21	2	44
Experience of a previous visit	**14**	12	16	16	14	5	29
Guide books	**5**	1	6	9	9	2	2
Internet Website	**5**	2	5	9	9	1	2
Radio/TV Programmes	**5**	2	7	5	8	1	4
Tourist brochures	**4**	2	4	7	8	0	2
Newspaper/magazine articles	**3**	1	3	5	5	0	1
Tourist Information Centre	**2**	1	2	2	2	1	2
Package Tour Operators	**1**	0	1	4	3	0	0
Advertisement	**1**	0	1	1	1	0	0
Travel Agents	**1**	0	0	2	2	0	0

From the table above it can be seen that other options to those provided ranked highest both overall, and for every group analysed except VFR. The most frequent other influences stated were:-

- Work (24% overall)
- Family, friends, funerals, weddings (4% overall)

There were a number of other influences stated mainly relating to the motivations mentioned in the previous table, with the addition of issues such as being part of the Smyril route, and North Sea Cycle Route.

The second and third ranking influences overall, by all origin groups and for holiday visitors, advice from friends and relatives and experience of previous visits. For business visitors second ranking was experience of previous visits at 5%, this reflects the high percentage of other 74% which included those stating work. For VFR visitors the top 3 in order were fiends and relatives, experience of previous visits and other. The largest spread of influences came from overseas and holiday visitors, and the smallest from Scottish and business visitors. What is interesting to note about the table above is that direct promotional materials rank well below, word of mouth and previous experience, although overall and combined they were mentioned by 27% of respondents.

Table 9.7 Marketing Influences to Visit Holiday Visitors %

	All	Scot	Other UK	OS	First Visit	Repeat Visit
Other	**30**	26	37	26	33	17
Advice from friends and relatives	**21**	34	19	16	21	21
Experience of a previous visit	**14**	20	12	14	1	71
Internet Website	**9**	9	9	9	10	6
Guide books	**9**	6	8	11	10	4
Tourist brochures	**8**	8	7	9	8	6
Radio/TV Programmes	**8**	7	10	7	9	3
Newspaper/magazine articles	**5**	2	5	7	6	2
Package Tour Operators	**3**	1	2	6	4	2
Tourist Information Centre	**2**	2	2	2	2	1
Travel Agents	**2**	0	1	3	2	1

Again the most important market segment to assess in terms of marketing influence is the holiday market. From the table above it can be seen that other options to those provided ranked highest both overall, and for other UK, overseas and first time visitors. As stated previously the most frequent other influences stated were work and family event or issues. The second and third ranking influences overall were advice from friends and relatives, and experience of previous visits. These three ranked top for each group analysed, although in a differing order, with the exception of first time visitors for whom the internet and guide books ranked third. There was a relatively widespread number of marketing influences mentioned by all groups. It is also interesting to note again that direct promotional materials rank well below, word of mouth and previous experience for all groups other than first time visitors. Although overall and combined they were mentioned by 47% of respondents. This varied from 56% for overseas visitors to 29% for repeat visitors. In terms of direct marketing to first time visitors it would appear that the internet and guide books are slightly more effective than other options suggested.

10. Activities

Table 10.1 Main Activity and Activities Undertaken %

	Main Activity	Activity Undertaken	No of Activities Undertaken	%
No Main Activity/No Response	54	16	1	11
General Sightseeing/Touring	13	45	2	9
Longer Walks - Over 2 Miles	9	26	3	6
Short Walks - Up To 2 Miles	5	54	4	7
Bird Watching	3	37	5	7
Other Local Or Cultural Events	2	12	6	8
Cycling	2	3	7	8
Other Activities/Events	2	5	8	7
Musical Entertainment Or Activities	2	15	9	6
Historical Or Archaeological Sites	1	35	10	5
Swimming/Leisure Centres	1	9	11	4
Photography/Painting	1	35	12	2
Water Sports	1	1	13	2
Boat Trips	1	19	14	1
Fishing	1	4	15	1
Other Sports	1	2	No response/None	16
Educational Events Or Activities	0	5		
Family Tree/Genealogy	0	3		
Heritage Centres/Museums	0	31		
Beaches/Coastal Scenery	0	49		
Shopping For Crafts/Local Products	0	31		
Golf	0	1		
Other Activities	0	1		
Guided Tour	0	10		
Other Nature Watching	0	27		
Art Galleries/Craft Centres	0	14		
Nature/Wildlife Sites	0	30		

From the table above it can be seen that 54% of respondents stated that they had no main activity whilst in the islands, however only 16% stated they had not participated in any activities. The most frequently mentioned main activities were general sightseeing, walking and bird watching, and the most frequently participated in short walks, beaches and scenery, general sightseeing, bird watching, historic and archaeological sites and painting and photography. 1 in 5 visitors participated in 1 or 2 activities, with 14% participating in more than 10 activities.

Table 10.2 Main Activity and Activities Undertaken by Origin %

	Main			Undertaken				%		
	Scot	UK	OS	Scot	UK	OS	No	Scot	UK	OS
No Main Activity/No response	64	42	52	26	9	3	1	16	6	6
General sightseeing/touring	8	17	15	37	49	62	2	13	6	5
Short walks - up to 2 miles	5	5	6	45	60	68	3	7	5	4
Longer walks - over 2 miles	4	14	12	19	30	36	4	7	8	7
Other local or cultural events	4	1	1	9	15	16	5	6	8	8
Other activities/events	3	2	0	6	4	4	6	5	11	9
Musical entertainment or activities	3	1	0	10	18	21	7	6	11	10
Cycling	2	2	3	1	2	7	8	4	8	11
Swimming/Leisure Centres	2	1	1	9	9	12	9	3	8	9
Water sports	1	0	1	1	2	1	10	3	6	9
Historical or archaeological sites	1	1	2	22	42	54	11	1	5	7
Fishing	1	1	0	3	4	3	12	1	3	4
Boat trips	1	1	0	9	25	28	13	1	2	3
Bird watching	1	6	3	22	47	53	14	1	1	2
Photography/painting	1	1	1	21	42	53	15	1	0	1
Other sports	1	0	1	2	1	2	16	0	0	1
Educational events or activities	0	0	1	4	6	5	17	0	1	0
Shopping for craft/local products	0	0	0	22	33	49	None	26	9	3
Golf	0	0	0	1	1	1				
Other activities	0	0	0	1	1	0				
Heritage centres/museums	0	1	0	17	41	45				
Family tree/genealogy	0	0	0	3	3	4				
Beaches/coastal scenery	0	0	0	33	62	64				
Art galleries/craft centres	0	0	0	7	19	23				
Guided tour	0	0	0	6	12	17				
Other nature watching	0	0	0	12	37	43				
Nature/wildlife sites	0	0	0	15	39	48				

From the table above it can be seen that when analysed by origin 64% of Scottish, 42% of other UK and 52% of Overseas respondents stated that they had no main activity whilst in the islands, however only 26%, 9% and 3% respectively stated they had not participated in any activities. The most frequently mentioned main activities were general sightseeing and walking, and the most frequently participated in short walks, beaches and scenery, general sightseeing, bird watching, historic and archaeological sites and painting and photography, as well as shopping for local crafts and products. Scottish visitors most frequently participated in 1 or 2 activities (with 26% undertaking no activities), UK visitors about 6 or 7 and overseas visitors 7 or 8.

Table 10.3 Main Activity and Activities Undertaken by Purpose %

	Main			Undertaken				%		
	Hol	Busi	VFR	Hol	Busi	VFR	No	Hol	Busi	VFR
No Main Activity/No response	39	76	46	1	37	9	1	3	21	8
General sightseeing/touring	21	4	13	61	26	50	2	5	14	8
Longer walks - over 2 miles	13	2	11	40	11	26	3	5	7	7
Bird watching	5	1	1	59	15	34	4	7	5	12
Cycling	5	0	1	5	1	2	5	7	4	10
Short walks - up to 2 miles	4	4	8	69	35	59	6	11	2	10
Other local or cultural events	3	1	5	16	5	16	7	12	4	9
Historical or archaeological sites	2	1	0	62	10	29	8	11	3	5
Musical entertainment or activities	2	1	1	17	7	22	9	9	2	7
Photography/painting	1	1	1	53	14	40	10	10	1	5
Water sports	1	0	1	1	1	2	11	7	0	5
Family tree/genealogy	1	0	0	3	1	8	12	5	0	1
Boat trips	1	0	0	30	6	19	13	3	0	1
Educational events or activities	0	1	0	6	3	4	14	2	0	0
Shopping for crafts/local products	0	0	0	44	14	39	15	1	0	1
Beaches/coastal scenery	0	0	0	71	21	56	16	1	0	0
Guided tour	0	0	0	19	2	8	None	1	37	9
Other sports	0	1	1	1	1	2				
Other nature watching	0	0	0	45	6	28				
Other activities/events	0	3	4	2	4	11				
Swimming/Leisure Centres	0	2	2	10	7	12				
Fishing	0	0	2	2	4	7				
Heritage centres/museums	0	0	1	53	7	31				
Other activities	0	0	0	2	0	0				
Golf	0	0	0	1	1	2				
Art galleries/craft centres	0	0	0	24	3	16				
Nature/wildlife sites	0	0	0	54	9	22				

From the table above it can be seen that when analysed by trip purpose 39% of holiday, 76% of business and 46% of VFR respondents stated that they had no main activity whilst in the islands, however 1%, 37% and 9% respectively stated they had not participated in any activities, showing a high level of inactivity among business visitors. The most frequently mentioned main activities were general sightseeing and walking, and the most frequently participated in short walks, beaches and scenery, general sightseeing, bird watching, and historic and archaeological sites. Business visitors most frequently participated in 1 or 2 activities (with 37% undertaking no activities), VFR visitors about 4 to 6 and holiday visitors 6 to 8. Lower activity levels for both business travellers and Scots as shown in the previous table again highlight the higher levels of Scottish business travel.

11. Feedback and Satisfaction

Table 11.1 Potential Improvements to Visit %

	All	Scot	UK	OS	Hol	Busi	VFR
Nothing/No Response/Don't Know	**44**	44	41	48	41	48	42
Less Expensive Travel	**11**	16	9	3	4	17	16
Other suggestions	**8**	7	10	9	10	6	8
Better public transport - frequency, coverage	**6**	7	6	5	9	3	5
More places to eat, Better places to eat	**6**	4	8	4	6	5	6
Improved Accommodation - better, cheaper,	**4**	3	4	5	5	4	2
Tourist Information - more, better	**3**	3	4	4	6	0	3
Entertainment, things to do, activities	**3**	3	0	4	3	2	2
Improved air links - frequency, routes, times	**2**	2	2	1	1	3	2
Improved airport facilities/service	**2**	2	2	1	1	2	3
Signage	**2**	2	1	2	3	2	0
Better advertising, promotion	**2**	2	1	2	2	2	1
Shops - better, opening hours, stock, variety	**1**	1	1	2	1	1	2
Improved sea links, frequency, times, etc	**1**	1	1	3	2	1	2
The general expense	**1**	1	0	2	1	1	1
Tidy place up - litter, graffiti, flowers, etc	**1**	1	2	0	1	0	1
Improve walking opportunities and access,	**0**	0	0	1	1	0	1
Improve buildings - both old and new	**0**	0	1	1	1	0	1
Public Toilets	**0**	0	1	0	1	0	0
Keep it unspoilt, keep local culture/tradition	**0**	0	1	0	1	0	0
Price of Petrol	**0**	1	0	0	0	0	0
Greater use of local produce, products	**0**	0	1	0	0	0	1
Quality of service in service sector	**0**	0	0	0	0	0	1

Respondents were asked an open question about what Shetland could have done that would have improved their visit. From the table above it can be seen that Overall 44% stated that they could not think of anything, or stated no improvement was required. Just over 1 in 10 stated less expensive travel, and just over 1 in 20 improvements to public transport and eateries. Within the groups analysed between 41% and 48% made no comment, Scottish and business/VFR travellers were more concerned about external travel, and other UK, overseas and holiday visitors more concerned about internal transport. Generally other than transport the stating each topic are too small to allow any variations between groups to be identified as significant. Other included more on-line booking for activities and accommodation, better publicity of fishing regulations, day care, improved mobile phone reception and a massage parlour.

Table 11.2 Activity Improvement or Provision%

	All	Scot	UK	OS	Hol	Busi	VFR
Nothing/No Response	**78**	77	80	75	75	80	77
Other	**4**	4	3	8	5	4	5
Cinema	**3**	6	1	2	1	6	5
Café, Eating Facilities	**2**	2	3	2	3	1	2
Footpaths, Stiles, Walking Trails, Etc	**2**	1	3	2	3	0	2
Public Transport, Adequate Bus Service	**1**	1	1	1	2	1	2
Kayaking, Canoeing, Water Sports	**1**	1	1	2	1	1	1
Wireless Internet, Internet Café	**1**	1	0	0	0	2	0
Not Much To Do Off-Season	**1**	1	1	0	1	1	0
Cycle/Motorbike Hire	**1**	1	1	1	2	0	0
More Organised Tours, Boat Trips, Etc	**1**	1	1	1	1	1	0
Music Venue, Local Concerts/Sessions	**1**	1	1	1	1	0	1
Pony Trekking/Horse Riding	**1**	0	1	1	1	0	0
Shopping	**1**	1	0	1	1	1	0
Ten Pin Bowling	**1**	1	0	0	0	0	2
More Info\What's On Guide	**1**	1	0	1	1	0	0
Nightlife, Evening Entertainment	**0**	0	0	1	0	1	0
Museum Shut	**0**	0	0	1	1	0	0
General Activities When Weather Poor	**0**	1	0	0	0	1	0

Respondents were asked an open question about activities could have been improved or provided. From the table above it can be seen that Overall 78% stated that they could not think of anything, or stated no improvement was required, or no additional activities required. 3% mentioned a cinema, and 4% walking and eating provision improvements. Within the groups analysed between 75% and 80% made no comment, Scottish and business/VFR travellers were more likely to mention a cinema, however the stating each topic are too small to allow any variations between groups to be identified as significant. Other included knitting, painting and music workshops, car parking and more activities for young people(both visitors and local).

Table 11.3 Meeting Expectations %

	All	Scot	UK	OS	Hol	Busi	VFR
Exceeded expectations	42	34	50	46	49	30	47
Met expectations	55	64	47	47	45	67	52
Did not meet expectations	1	0	2	3	3	0	0
Not sure I can't say	2	2	2	3	2	2	1

From the table above it can be seen that overall 55% of respondents felt their expectations had been met, and 42% that they had been exceeded. Travellers where proportionately more expectations were exceeded were holiday makers and those from other areas of the UK. Those where most felt their expectations had been met were business travellers and those from Scotland. There were extremely low levels stating that their expectations had not been met 1% overall and ranging from 3% for overseas and holiday visitors to 0% for Scottish, business and VFR visitors. It is worth noting however that although levels were low, holiday makers were those who stated expectations had not been met.

Table 11.4 Meeting Expectations 2000 Comparison %

	2006			
	All	Hol	Busi	VFR
Exceeded expectations	42	49	30	47
Met expectations	55	45	67	52
Did not meet expectations	1	3	0	0
Not sure I can't say	2	2	2	1
	2000			
	All	Hol	Busi	VFR
Exceeded expectations	35	43	22	41
Met expectations	61	52	74	54
Did not meet expectations	1	1	1	2
Not sure I can't say	3	4	3	3
	Difference			
	All	Hol	Busi	VFR
Exceeded expectations	7	6	8	6
Met expectations	-6	-7	-7	-2
Did not meet expectations	0	2	-1	-2
Not sure I can't say	-1	-2	-1	-2

From the table above it can be seen that compared to 2000 there are now 7% more travellers stating that their expectations had been exceeded, varying from 6% to 8% for the groups analysed. However there has been a rise of 2% for holiday makers, whose expectations were not met.

Table 11.5 Areas Falling Shortest of Expectations %

	All	Scot	UK	OS	Hol	Busi	VFR
Nothing/No response	**79**	82	77	78	75	83	81
Transport	**4**	3	5	3	5	2	3
Food eating cafes/restaurants	**3**	3	5	2	4	2	4
Weather	**3**	2	2	5	4	2	4
Accommodation	**3**	3	2	2	3	4	1
Prices	**1**	1	1	2	1	1	0
Activities events or attractions	**1**	1	1	1	1	1	0
Shops	**1**	1	0	1	1	1	2
Facilities being closed	**1**	1	1	1	1	1	2
Lack of information or promotion	**1**	1	0	0	1	1	0
Other	**1**	0	2	0	1	0	0
Lack of bird/ponies/animals	**1**	0	0	2	1	0	0
Com St dirty, youths, fighting	**0**	1	0	0	0	1	0
Signage/Interpretation	**0**	0	1	0	0	1	0
Lack of Music/Dance	**0**	1	0	0	0	0	0
Parking/Walkways	**0**	0	1	0	1	0	0
Scenery	0	0	0	1	0	0	0
Lack of time	0	0	0	1	0	0	0

Respondents were asked an open question about what aspect of their visit if any fell shortest of their expectations. From the table above it can be seen that overall 79% stated that they could not think of anything. 4% mentioned transport, and 3% eating, weather and accommodation. Within the groups analysed between 77% and 83% made no comment, UK and holiday travellers were more likely to mention transport, and overseas visitors weather however the numbers stating each topic are too small to allow any variations between groups to be identified as significant.

Table 11.6 Highlight of Visit %

	All	Scot	UK	OS	Hol	Busi	VFR
Scenery	14	13	15	12	14	18	7
Nothing/No Response	7	12	4	4	1	17	2
The people, friendliness/hospitality	7	8	5	7	5	9	4
Other animals/ponies/otters/seals/Wildlife	6	5	9	5	8	5	5
VFR	6	7	5	5	1	2	23
Birds	4	3	7	4	7	2	2
Boat of ferry trip	3	2	5	4	6	1	3
Socialising/Activities/Events	3	5	2	1	1	4	4
Food & Drink	3	4	1	2	1	6	2
Other	3	3	3	2	2	3	4
Culture/Peace/Remoteness/Freedom	3	3	3	2	3	2	4
Walking	2	1	3	3	4	2	1
Up Helly Aa	2	4	1	1	2	1	4
Weather	2	3	2	1	1	3	3
Specific Areas - Sumburgh Head	2	1	2	4	4	1	1
Nature/plants/flora	2	0	2	5	3	2	1
Wedding/Party/Family event	2	3	1	1	0	0	9
Music & Arts	2	2	1	2	2	1	2
Sport/Leisure/Fishing	2	3	1	1	1	2	3
Specific Areas - St Ninian's Isle	2	2	2	1	2	0	3
Specific Areas - Other Unst	2	2	1	2	3	1	1
Work/Business	2	2	1	1	0	4	0
Specific Areas - Eshaness	2	1	2	1	3	0	1
Specific Areas - Hermaness	2	0	2	3	3	0	1
Specific Areas - Jarlsoff	1	0	2	3	4	0	0
Internal transport	1	1	1	0	0	3	0
Archaeology/History	1	1	1	3	1	1	0
Specific Areas - Mousa	1	1	1	1	2	0	0
Specific Areas - Noss	1	0	1	2	2	0	1
Specific Areas - Fair Isle	1	0	1	1	2	0	0
Accommodation	1	1	1	1	2	0	0
Genealogy	1	1	0	2	1	0	2
Specific Areas - Other North Mainland	1	1	1	0	1	1	1
Specific Areas - Lerwick	1	1	0	1	1	1	0
Specific Areas - Scatness	1	0	1	1	1	0	0
Specific Areas - Muckle Flugga	1	1	1	0	1	0	1
Specific Areas - Other North Isles	1	1	0	1	1	0	1
Going home	1	1	1	0	0	1	0
Tours/tour guides	1	0	1	1	1	0	0
Specific Areas - Bressay	1	0	1	1	1	0	2
Specific Areas - Other Outer Isles	0	1	0	0	1	0	1
Specific Areas - West Mainland	0	0	0	1	1	0	0
Specific Areas - Scalloway	0	0	0	1	1	0	0
Shops	0	0	0	1	0	0	1
Knitwear/Wool	0	0	0	1	1	0	0

Respondents were asked an open question about what they considered to be the highlight of their visit. From the table above it can be seen that overall 14% stated the scenery, 7% that they could not think of anything, 7% the people, 6% animals other than birds (4% stated birds) and 6% seeing friends and relatives. Overall the area of Shetland most stated was Sumburgh head. Within the groups analysed between 7% and 18% stated the scenery, and this ranked top for all except VFR visitors where unsurprisingly seeing friends and relatives was stated by 23% of respondents. As with many of the other open questions however the numbers stating each topic are too small to allow any variations between groups to be identified as significant.

Table 11.7 Recommend Shetland %

	All	Scot	UK	OS	Hol	Busi	VFR
Yes	**91**	89	92	93	95	84	94
No	**8**	9	6	5	4	14	5
Don't Know	**2**	2	1	1	1	3	1

From the table above it can be seen that an overwhelming majority overall 91%, and within all the groups analysed varying from 95% for holiday visitors to 84% for business visitors would recommend Shetland to others. It should be noted however that 8% overall would not recommend the islands, varying from 4% for holiday visitors to 14% for business visitors.

Table 11.8 Opinions of Tourism Aspects Overall %

	Very Good	Good	OK	Poor	Very Poor	Don't Know	Average
Archaeological sites	25	18	4	1	0	52	**4.42**
Quality of local food and ingredients	33	30	3	1	0	33	**4.40**
Tourist Information Centre	28	19	5	1	0	47	**4.39**
Musical or cultural entertainment	18	14	4	1	0	63	**4.30**
Access for walking, sightseeing etc	34	32	8	2	0	24	**4.29**
Quality of local arts and crafts products	21	27	5	1	0	47	**4.25**
Local Information	27	40	7	2	0	24	**4.19**
Your accommodation	29	30	11	3	0	28	**4.17**
Museums & Heritage Centres	15	22	6	1	0	55	**4.13**
Site interpretation	19	28	10	2	0	41	**4.08**
Transport to Shetland	30	42	20	5	1	3	**3.98**
Availability of local food and ingredients	20	30	9	5	1	36	**3.97**
Transport in Shetland	20	29	11	4	1	33	**3.94**
Sign-posting	21	41	15	4	1	17	**3.93**
Eating out	24	38	16	5	1	15	**3.92**
Quality of other souvenir products	8	22	13	2	0	55	**3.78**
Shops	9	36	29	4	0	21	**3.62**
Things to do on wet days	4	10	12	9	1	64	**3.16**

Respondents were asked to rate various aspects of Shetland tourism on a sliding scale from very good to very poor. The average score above which is weighted is based on a scoring system ranging from 5 for very good to 1 for very poor. This allows for direct comparison between the various aspects with a higher weighted average score showing a higher average level of satisfaction. From the table above it can be seen that, the top 3 average weighted scores were achieved by archaeological sites, the quality of local food and the TIC, and the lowest for things to do on wet days, shops and quality of other (non-local) souvenir products. Average scores were all above 3 showing that even those ranked lowest were on average rated as OK. Those proportionately most frequently stated as very good also had the top 5 average weighted scores, with all other aspects most frequently being stated to be good other than things to do on wet days where this was OK. Those which were most frequently stated to be poor or very poor were things to do on wet days at 10%, and eating out, availability of local food and transport to

Shetland all at 6%. Those aspects where respondents stated they did not know (which were scored at 0 and not included in average scores) were music or cultural entertainment at 63% and museums and heritage centres and other souvenir products at 55%. Those where proportionately fewest stated they did not know were transport to Shetland 3%, eating out 15% and signposting 17%. The levels of respondents stating they did not know to this question may bear some correlation to the proportions of visitors accessing these aspects of local tourism.

For several aspects of tourism that were rated in the table above, where a respondent stated a rating of OK or below i.e. poor/very poor, they were asked for an explanation as to why they had given this response. The following tables detail the reasons provided. Numbers quoted are numbers of respondents stating a particular reason, not proportions of respondents.

Table 11.9 Suggested Areas for Improvement Eating Out

	Number Stating
Limited choice menu and establishments	53
Poor quality of food and cooking	44
Lack of eateries	36
Lack of professionalism, finesse or effort	19
Poor service	14
Too expensive	13
Lack of local produce	12
Restricted hours - earlier/later opening required	10
Lack of info and promotion about where to eat	9
Power cut during eating	1
Could not get a receipt	1
TOTAL	**212**

From the table above it can be seen that in relation to eating out the most frequently stated areas for improvement were in relation to menus, food quality and numbers of eating establishments. It should be noted that this was the area where most comments were made with 17% of respondents providing comment.

Table 11.10 Suggested Areas for Improvement Accommodation

	Number Stating
In need of refurbishment, redecoration	32
Too expensive	17
Poor hygiene/dirty	13
Poor all round quality	9
Heating issues (too cold or hot)	7
Poor service	6
Lack of information	4
Lack of facilities in rooms	4
Noise	3
Access issues	2
No caravan hire	1
Lack of entertainment/activities	1
TOTAL	**99**

From the table above it can be seen that in relation to accommodation the most frequently stated areas for improvement were in relation to refurbishment, expense and hygiene. It should be noted that 8% of respondents in total provided comment on this aspect.

Table 11.11 Suggested Areas for Improvement Local Art & Crafts

	Number Stating
Lack of availability	12
Lack of info/marketing	6
Limited range available	6
Too expensive	6
Nothing out of the ordinary available	4
Poor quality	4
Some souvenirs not made locally	1
TOTAL	**39**

From the table above it can be seen that in relation to local arts and crafts the most frequently stated areas for improvement were in relation to availability, marketing and limited range. It should be noted that 3% of respondents in total provided comment on this aspect.

Table 11.12 Suggested Areas for Improvement Local Information

	Number Stating
Lack of information	34
Poor availability/discrepancies in timetables	7
Need for more detailed local maps	6
TIC closed	3
Poor signage and interpretation	1
TOTAL	**51**

From the table above it can be seen that in relation to local information the most frequently stated areas for improvement were in relation to lack of information, timetabling issues, and more detailed maps. It should be noted that 4% of respondents in total provided comment on this aspect.

Table 11.13 Suggested Areas for Improvement Local Food Products

	Number Stating
General lack of availability/use of produce	50
Lack of promotion	28
Lack of local fish	14
Not evident in local eateries or on menus	14
Lack of other specified products	11
Lack of local meat	5
Could not find Orkney produce	2
Availability is improving, but is still poor	2
Not much real cuisine or imagination	2
Not as good as Orkney	1
Poor quality	1
TOTAL	**130**

From the table above it can be seen that in relation to local food products the most frequently stated areas for improvement were in relation to lack of availability both overall and more specifically fish and at local eateries. There was also felt to be a lack of promotion. It should be noted that 10% of respondents in total provided comment on this aspect, making it the second most frequently commented aspect.

Table 11.14 Suggested Areas for Improvement Other

	Number Stating
Poor/misplaced signage	7
More/better walkways paths and stiles	3
Lack of info at TIC	2
Museum closed	2
Taxi driver drunk	1
Couldn't find a flag	1
TOTAL	**16**

From the table above it can be seen that in relation to other areas the most frequently stated areas for improvement were in relation signage and walking. It should be noted that only 1% of respondents in total provided comment on other aspect. Perhaps the most significant aspect among the above is that only 2 respondents mentioned that the Lerwick museum was closed.

12. Total Travel & Trip Details Cruise

12.1 Total Travel

Table 12.1 Total Cruise Visitors

	Total
Passengers	25,470
Crew	17,565
Total	43,035

From the table above it can be seen that in 2006 Shetland had 43,035 cruise travellers 25,470 or 59% were passengers, and 17,565 or 41% were crew..

12.2 Social Group

Table 12.2 Social Group (based on chief income earner) & Orkney Comparison %

	Shetland	Orkney	% Difference
AB	8	15	-7
C1	12	8	4
C2	5	2	3
DE	1	1	0
Retired/No Response	75	74	1

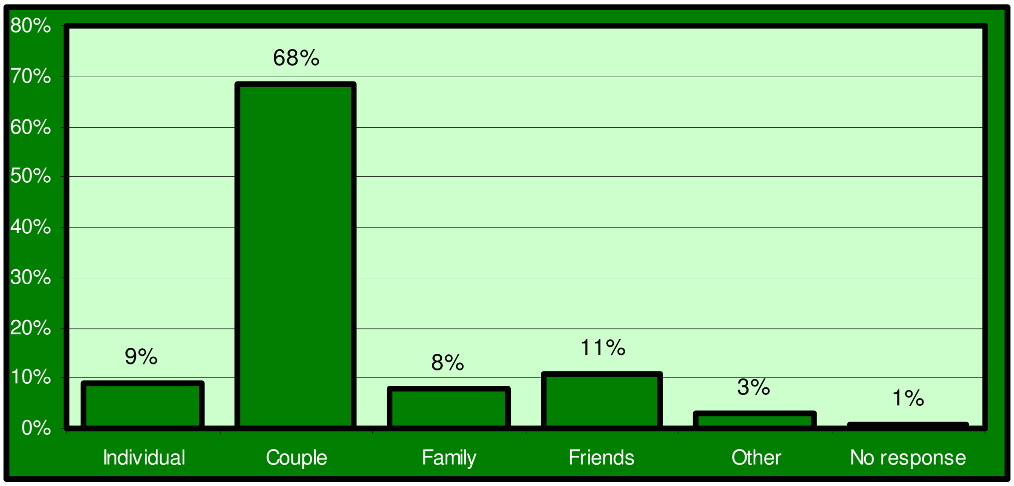
From the table above it can be seen that around three quarters of respondents in both surveys were either retired, or did not specify an occupation, of those that did Orkney had proportionately more AB's and Shetland more C1's and C2's.

12.3 Party Type and Size

Table 12.3 Party Type by Respondent %

Individual	9
Couple	68
Family	8
Friends	11
Other	3
No response	1

Figure 12.1 Party Type by Respondent



It should be noted that these figures relate to respondents and not proportions of all visitors, that is calculated further on within this section. From the table and chart above it can be seen that couples form by far the largest proportion of respondent cruise travel in Shetland at 68%, with travel with friends being the next highest at 11%, individuals at 9% and families at 8%.

Table 12.4 Party Type and Average Party Size by All Cruise Visitors

	% Type	Average Party Size
Individual	4	1.00
Couple	59	2.00
Family	14	3.97
Friends	14	3.00
Other	9	7.32
No response	0	1.17
TOTAL	100	**2.33**

From the table above it can be seen that in terms of all cruise visitors to the islands couple travel accounts for 68%, with travel with friends and family being the next highest at 14% each and individuals at 4%. Overall average party size was 2.33 people, varying from 1 as would be expected for individuals to 7.32 for other, among specified groups the highest average party size was 3.97 for families.

12.4 Gender

Table 12.5 Gender of Respondent

	2006%	1999%
Male	40	40
Female	50	59
No Response	10	1

From the table above it can be seen that in the 2006 survey 40% of respondents were male and 50% female, 10% or respondents gave no response to this question. In 1999 40% of respondents were also male, 59% female and 1% gave no response.

Table 12.6 Gender of Visitor

	2006 %
Male	47
Female	53

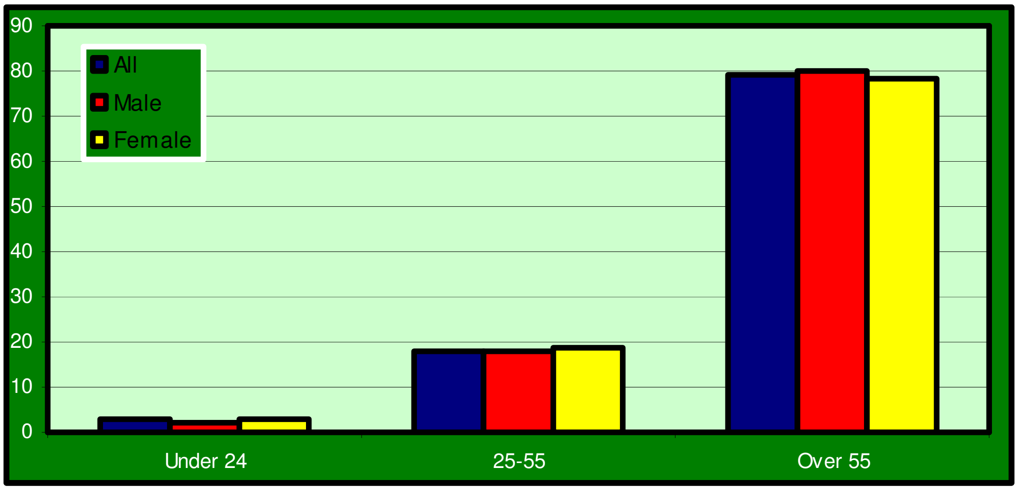
From the table above it can be seen that 47% of overall cruise visitors surveyed were male and 53% female, no responses were omitted.

12.5 Age

Table 12.7 Age of Visitors by Gender

	All	Male	Female
Under 24	3	2	3
25-55	18	18	19
Over 55	79	80	78

Figure 12.2 Age of Visitors by Gender



The table and figure it can be seen that the vast majority of cruise ship travellers were aged over 55, at 79% overall, 80% for males and 78% for females. There were also extremely few 24 and unders at only 2%-3% both overall and by gender. There was an extremely even gender split by age, which is not unexpected given the predominance of couple travel.

Table 12.8 Age of Visitors Comparison to Orkney

	Shetland 2006%	Orkney 2004%
Under 24	3	0
25-55	18	12
Over 55	79	82

From the table above it can be seen that the vast majority of Orkney cruise ship travellers were also aged over 55. There were also 5% no responses for Orkney.

12.6 Origin

Table 12.9 Area of Origin All Visitors Comparison to Orkney

	Shetland 2006%	Shetland 1999%	Orkney 2004%
UK	18	19	43
Rest of Europe	34	8	19
Rest of World	48	73	22
No Response	0	0	15

From the table above it can be seen that the Shetland surveys both in 2006 and 1999 had proportionately more non-UK cruise visitors. However there were 15% no responses in the Orkney survey, and it is not known if foreign language questionnaires were provided within that survey. Foreign language versions of the Shetland questionnaire were provided in 2006, which helped encourage non-English speaking participation in the survey, in 1999 there were high levels of North American English speaking respondents. If the Orkney survey were conducted using only an English questionnaire on a self-completion basis this may have skewed the results toward English speaking cruise ship visitors, as it is possible also happened in Shetland in 1999, where there were considerably more rest of the world respondents, mainly North American than Europeans.

Table 12.10 Country of Origin

	Shetland 2006%	Shetland 1999%
UK	**18**	**19**
Scotland	1	No data
Other UK	17	No data
EUROPEAN	**34**	**8**
Finland	1	0
France	1	0
Germany	28	>1
Holland	1	>1
Italy	2	0
Portugal	0	6
Spain	1	>1
Rest of Europe	0	>1
NON-EUROPEAN	**48**	**73**
USA/Canada	45	70
Other Overseas	3	3

From the table above it can be seen in 2006 nearly all UK cruise travellers surveyed came from outwith Scotland, the majority of European visitors were German and Non-European from North America. In 1999 the majority of euroens surveyed were Portugese and Non-Europeans North American. It is apparent that a significantly higher proportion of North Americans were surveyed in 1999, 73% as opposed to 48%, and significantly more Europeans in 2006, 34% as opposed to 8%. Proportions from the UK are relatively similar at 18% and 19% respectively.

12.7 Previous Visits

Table 12.11 Previous Visits by Respondent %

	Shetland	Orkney
Never First Time	93	85
1	4	2
2	1	10
3-5	0	1
More than 5	1	0
No response	1	2

From the table above it can be seen that an overwhelming 93% of respondents to the Shetland survey and 85% to the Orkney survey were first time visitors. There was a much higher percentage of Orkney respondents who had visited the area 2 times, compared to Shetland, 10% as opposed to 1%.

12.8 Main or Second Holiday

Table 12.12 Main Holiday or Second Holiday %

Main Holiday	21
Second Holiday	74
No response	4

From the table above it can be seen that only 21% of respondents were on their main holiday for the year.

12.9 Importance of Shetland on Cruise Itinerary

Table 12.13 Importance of Shetland on Cruise Itinerary

	Shetland 2006%	Shetland 1999%
Very	43	31
Quite	46	45
Not	8	22
No response	2	2

From the table above it can be seen that the most frequent response to this question both in 1999 and 2006 was that Shetland was quite important in influencing their cruise choice at 45% and 46% respectively. However there were significantly more respondents stating that it was very important in 2006 than 1999, 43% as opposed to 31%, with only 8% stated that it was not important in 2006 as opposed to 22% in 1999. Therefore it would appear that there may have been an increase in the importance of Shetland as a cruise destination for passengers.

12.10 Problems Obtaining Sterling

Table 12.14 Problems Obtaining Sterling

	Shetland 2006%	Shetland 1999%
No	78	74
Problems on boat	3	2
Problems onshore	2	2
Other	1	4
No response	16	18

From the table above it can be seen that in 2006 78% of respondents stated that they did not have any problems obtaining sterling as opposed to 74% in 1999. 3% stated problems on the boat and 2% onshore, these figures were both 2% in 1999. Therefore it could be that there has been as slight drop in the level of passengers having exchange difficulties, falling from 8% to 6%.

12.11 Onshore Travel

Table 12.15 Onshore Travel

	Shetland 2006%	Shetland 1999%
Bus tour	78	72
Independently	7	14
Both	12	14
No response	2	0

From the table above it can be seen that in 2006 90% of respondents stated that they had travelled on a bus tour, including 12% who had travelled both on a tour and independently, figures for 1999 were 86% and 14% respectively. It is possible that this is an overestimate as bus tours were targeted within both surveys in order to obtain bulk returns, however it is apparent that a very high percentage of cruise ship visitors undertake bus tour travel. Within the Orkney survey bus tour participation was stated as 86%, but again this figure may have been heightened due to significant bus tour sampling.

12.12 Areas Visited

Table 12.16 Areas Visited %

Lerwick	98
Jarlsoff	32
Scalloway	45
Mousa	12
Noss	1
Other	4
No response	2

From the table above it can be seen that 98% of respondents stated they had visited Lerwick, when the 2% no responses are included this represents all visitors, which is what would be expected as all interviews were undertaken with cruise ship travellers berthing in Lerwick, Jarlsoff, Scalloway and Mousa also featured highly as laces visited, which again is unsurprising as this is where bus tours tend to go.

Cruise Visitors are more likely to be :-

- Travelling in a couple (59%)
- Female (53%)
- Aged over 55 (79%)
- Come from outwith the UK (82%)
- A first time visitor (93%)
- On a second holiday (74%)
- Feel Shetland is quite important on cruise itinerary (46%)
- Have no problems obtaining sterling (78%)
- Travel on a bus tour (90%)

13. Expenditure

Table 13.1 Average Spend (£)

	Food & Drink	Ent & Rec	Tourist Shopping	Other Shopping	Misc	Tour*	**Total in Shetland**
Origin							
UK	1.74	4.27	4.88	1.31	0.57	14.00	26.77
European	1.46	3.39	3.78	1.13	0.24	14.00	24.00
North American	1.05	6.68	9.10	3.03	0.54	14.00	34.40
Rest of World	1.29	6.77	7.02	4.50	0.00	14.00	33.58
Age							
Under 55	1.79	4.61	5.92	2.48	0.55	14.00	29.35
Over 55	1.19	4.68	6.59	2.01	0.33	14.00	28.80
Passenger/Crew							
Passenger	1.31	4.55	6.54	2.15	0.38	14.00	28.93
Crew	1.74	11.39	1.20	0.00	0.00	0.00	14.33
First Visit							
First Visit	1.28	4.67	6.32	2.18	0.36	14.00	28.81
Repeat Visit	2.03	5.09	8.90	1.44	0.60	14.00	32.06
Total							
Overall 2006	**1.32**	**4.67**	**6.44**	**2.12**	**0.38**	**14.00**	**28.93**
Overall 1999	**0.93**	**0.04**	**13.54**	**3.25**	**0.00**	**12.00**	**29.76**
Overall Orkney	**1.11**	**0.89**	**13.96**	**1.58**	**3.45**	**19.55**	**40.54**
Difference 1999-2006	**0.39**	**4.63**	**-7.10**	**-1.13**	**0.38**	**2.00**	**-0.83**
Difference Orkney-2006	**0.21**	**3.78**	**-7.52**	**0.54**	**-3.07**	**-5.55**	**-11.61**

All respondents were asked what they had spent on their trip to Shetland on a variety of items. As this was an exit survey with interviews occurring at the end of a trip actual totals for each of the items above were requested. Shetland tour expenditure totals are based on estimates from those within the industry of the average fee payable to Shetland businesses from within the full tour excursion price charged by the boat. It was also felt likely that actual average excursion prices paid by cruise passengers will be at least double these figures.

From the table above it can be seen that UK cruise ship visitors on average tend to spend more on food and drink and miscellaneous purchases, North Americans more on tourism shopping and rest of the world travellers more on

entertainment and recreation and other shopping. On average North Americans spend most at £34.40 and Europeans least at £24.
Those aged under 55 on average tend to spend more on food and drink, other shopping and miscellaneous purchases, and over 55's more on tourism shopping and entertainment and recreation. On average under 55's spend most at £29.35 and over 55's less at £28.80.

Passengers on average tend to spend more on tourism shopping, other shopping and miscellaneous purchases, and crew more on food and drink and entertainment and recreation. On average passengers spend most at £28.93 and crew less at £14.33. It should be noted that crew figures do not include tours.

Repeat visitors on average tend to spend more on all items other than other shopping, and first time visitors more on other shopping. On average repeat visitors spend most at £32.06 and first time visitors less at £28.81.

Overall average spend is estimated at £28.93, with the highest proportions spent on tours, tourism shopping and entertainment and recreation. Figures show a slight decrease in terms of overall spend compared to the 1999 survey and a significant decrease in terms of tourism shopping, however this should be read in conjunction with the issues highlighted below. It is also significantly lower than overall Orkney estimated spend figures, mainly in terms of tour and tourism shopping expenditure, however again this should be read in conjunction with the issues highlighted below.

The 2006 survey gave what initially appear to be some somewhat surprising results when compared to the 1999 survey and the Orkney one. However on closer examination the following issues were highlighted:-

- The 1999 survey had a considerably higher level of North American respondents, at 73% as opposed to 48% in 2006. The 1999 survey commenced when there were only 5 vessels left to dock within the season. These boats were therefore all surveyed and contained a high proportion of North American passengers. In addition the questionnaire in the 1999 survey was only provided in English, whereas the 2006 questionnaire was translated into other languages. It is likely that this increased the English speaking return rate in 1999. As shown in the table above North American cruise ship passengers tend to spend more than UK and European travellers, therefore it is possible that the high bias toward North American travellers in the 1999 survey may have inflated average spend figures.
- Both the 1999 and 2006 surveys provided data which suggests that passengers from smaller cruise vessels tend to have a higher average spend than those from larger vessels. As the 2006 survey specifically targeted larger vessels for bus tour survey, whereas the 1999 survey had only 5 vessels which could be surveyed only one of which was of an extremely significant size, it is possible that this may have affected average spend figures.
- The main fall in spending between the 1999 and 2006 survey was in tourism shopping, and it may be possible that those surveyed in 1999 had more opportunity to shop than those in 2006.
- With regard to the Orkney survey £19.55 as opposed to £14 for Shetland is the estimated tour spend. The Shetland figure is purely for monies directly going to Shetland businesses, however it is not known the basis on which the Orkney figure was calculated, and this may be average total tour spend. In addition it is believed from those within the industry that Orkney tours include a higher level of entry fees, within the tour price.
- Again in terms of tourism spend there is a large discrepancy with level similar to that found in the 1999 survey. On the face of it there does not appear to be a high level of North American interviewees, however there are 15% no responses in terms of nationality. There is however a

heightened level of UK respondents 43% as opposed to 18% -19% for Shetland, this may again show a bias toward English speaking passengers, which may have influenced averages.

- In addition the Orkney survey had a very low response rate, compared to Shetland 15% as opposed to well over 70%. Differing survey techniques were employed with Orkney appearing to be a spontaneous self-completion exercise, with Shetland an assisted self-completion, with face-to-face back up. Given the much lower return rate for Orkney it is probable that those who had spent money were more likely to complete the survey and therefore this may have heightened averages.
- The differing level of spending based on boat size may also have influenced averages, and it is also possible that Orkney visitors are provided with more opportunity to shop than those in Shetland.

14. Sources of Information/Inspiration

Table 14.1 Information Sources Used Prior to Arrival %

Internet/Websites	23
Tourist Board Brochure/Leaflet	7
TIC	4
Travel Agent	12
Cruise Line	72
Guide book	14
Friends/relatives advice from others	4
None/someone else organised it	4
Other	3
No response	4

From the table above it can be seen that the most frequently used information source overall was the cruise line at 72%, the next most frequent was the internet, at 23%.

Table 14.2 Sufficient Information at Port Lecture

	Shetland 2006%	Shetland 1999%
Yes	68	66
No	26	13
No response	6	21

From the table above it can be seen that in both surveys around two thirds of respondents felt that they had received adequate information at the port lecture. Around a quarter in 2006 and over a tenth in 1999 felt they had not. There was however a much lower level of no responses in 2006 down to 6% from 21%, which may indicate greater attendance at port lectures within the 2006 survey.

Table 14.3 Accurate Information at Port Lecture

	Shetland 2006%	Shetland 1999%
Yes	63	28
No	5	13
No response	32	59

From the table above it can be seen that again around two thirds of respondents in the 2006 survey felt that they had received accurate information at the port lecture. The figure for 1999 was around a quarter. However in 2006 only around 1 in 20 as opposed to 1 in 10 in 1999 felt the information was inaccurate. There was again a lower level of no responses in 2006 down to 59% from 32%, which again may indicate greater attendance at port lectures within the 2006 survey.

15. Feedback and Satisfaction

Table 15.1 Opinions of Tourism Aspects

	Very Good	Good	OK	Poor	Very Poor	Don't Know	No Answer	Average
Archaeological sites	21	13	3	0	0	14	48	4.35
Transport in Shetland	20	17	5	0	0	10	48	4.31
Tourist Information Centre	11	13	4	0	0	15	57	4.17
Site interpretation	15	12	4	0	0	14	55	4.15
Eating out	5	7	3	0	0	23	62	4.12
Quality of arts and crafts products	11	13	4	0	0	13	57	4.09
Access for walking, sightseeing etc	15	17	6	0	0	10	52	4.05
Museums & Heritage Centres	10	12	5	1	0	18	53	4.00
Local Information	12	12	5	0	0	14	58	4.00
Sign-posting	11	13	6	0	0	15	55	3.94
Shops	7	20	10	1	0	7	55	3.86
Quality of other souvenir products	5	12	7	0	0	16	59	3.73
Things to do on wet days	1	2	1	0	0	31	65	3.42
Quality of locally produced food	2	5	1	0	0	27	65	3.25
Availability of locally produced food	1	4	2	1	0	27	65	3.04
Musical or cultural entertainment	1	3	1	1	0	29	66	3.02

Respondents were asked to rate various aspects of Shetland tourism on a sliding scale from very good to very poor. The average score above which is weighted is based on a scoring system ranging from 5 for very good to 1 for very poor. This allows for direct comparison between the various aspects with a higher weighted average score showing a higher average level of satisfaction. From the table above it can be seen that, the top 3 average weighted scores were achieved by archaeological sites, transport in Shetland and the TIC, and the lowest for musical and cultural entertainment, and availability and quality of locally produced food. Average scores were all above 3 showing that even those ranked lowest were on average rated as OK. Those proportionately most frequently stated as very good also had the top 2 average weighted scores, with most other aspects most frequently being stated to be good. Those which were stated to be poor by 1% of respondents in all instances were museums and heritage centres, shops, musical and cultural entertainment, and availability of locally produced food. No aspects gained a very poor rating. Those aspects where respondents stated they did not know (which were scored at 0 and not included in average scores) were musical and cultural entertainment at 66%, availability and quality of locally produced food, and things to do on wet days 65%. Those where proportionately fewest stated they did not know were archaeological sites and transport in Shetland both at 48. The levels of respondents stating they did not know to this question may bear some correlation to the proportions of visitors accessing these aspects of local tourism, and also average ratings.

Table 15.2 Average Opinions of Tourism Aspects Comparison Orkney

	Shetland Average	Orkney Average
Transport in Shetland	4.31	3.53
Eating out	4.12	3.69
Quality of arts and crafts products	4.09	3.66
Sign-posting	3.94	3.59
Shops	3.86	3.50
Quality of locally produced food	3.25	3.36

The table above draws comparison where possible with ratings from the Orkney survey, however it is not known the methodology by which the Orkney figures were calculated and therefore how comparable the two sets of data are. However as can be seen from the table above the Shetland cruise ship passenger average satisfaction ratings were consistently higher than those in Orkney, and data within the Orkney report reveals a higher level of respondents rating aspects of tourism as poor or very poor than Shetland.

Table 15.3 Potential Improvements to Visit

Nothing/no response	79%
More time	13%
Guide speaking own language	1%
More opportunity to shop	1%
More information/maps	1%
Better internal transport/tour organisation	1%
More choice of excursions/activities facilities closed	1%
Better weather	1%
More acceptance of foreign currency	1%
Other	1%

Respondents were asked an open question about what Shetland could have done that would have improved their visit. From the table above it can be seen that Overall 78% stated that they could not think of anything, or stated no improvement was required. 13% more time with a variety of reasons accounting for the other 8%.

Table 15.4 Meeting Expectations Comparison to Orkney

	Shetland%	Orkney%
Exceeded expectations	50	49
Met expectations	37	37
Did not meet expectations	1	0
Not sure I can't say	12	13

From the table above it can be seen that overall 50% of respondents felt their expectations had been exceeded and 37% that they had been met, with only 1% stating they had not been met. This is more or less identical to the results obtained from the Orkney survey, where 49% felt there expectation had been exceeded and 37% that they had been met.

Table 15.5 Areas Falling Shortest of Expectations%

Nothing/No response	85
Lack of time	6
Weather	4
Tour and information problems	2
Other	1
Not enough wildlife	1
Noise/dirt in harbour	1

Respondents were asked an open question about what aspect of their visit if any fell shortest of their expectations. From the table above it can be seen that overall 85% stated that they could not think of anything. 6% mentioned lack of time and 4% weather.

Table 15.6 Highlight of Visit%

Nothing/No response	46
Landscape/Scenery/Remoteness	17
Tour/Guide	13
Jarlsoff	4
Wildlife/BirdsPonies	3
People	3
Weather	2
Other	2
Nature/Flowers	2
Mousa	2
Lerwick	2
Everything	2
Archaeology/History	2
Fort Charlotte	1

Respondents were asked an open question about what they considered to be the highlight of their visit. From the table above it can be seen that overall 46% stated they could not think of anything, 17% stated the scenery, and 13% the tour or tour guide.

Table 15.7 Recommend Shetland

	Shetland 2006%	Shetland 1999%
Yes	79	80
No	11	20
Don't Know	10	0

From the table above it can be seen that a large majority in both surveys of around 80%, would recommend Shetland as a holiday destination for friends and family.

Table 15.8 Return Visit%

Yes	55
No	15
Don't Know	30

From the table above it can be seen that 55% of respondents stated that they would like to return to Shetland, with only 15% stating they would not.

16. Total Travel Yacht & Trip Details

16.1 Total Travel

Table 16.1 Total Yacht Numbers

	Total
Shetland 2006	523
Shetland 2000	373
Difference	150

From the table above it can be seen that it is estimated that an additional 150 yachts visited Shetland in 2006 as compared to 2000.

16.2 Social Group

Table 16.2 Social Group (based on chief income earner)

	2006%	2000%
AB	17	73
C1	39	22
C2	4	5
DE	0	0
No Response	39	0

From the table above it can be seen that there has been a proportionate increase in C1 since 2000. There would also appear to have been a significant fall in AB, however the majority of respondents stated they were retired without providing a previous occupation and are therefore recorded as retired/no response. It should also be remembered that the number of respondents is small.

16.3 Party Type and Size

Table 16.3 Party Type by Respondent%

Individual	30
Couple	30
Family	9
Friends	30

It should be noted that these figures relate to respondents and not proportions of all visitors, that is calculated further on within this section.

From the table and chart above it can be seen that all party types were similarly represented other than travel with family.

Table 16.4 Party Type and Average Party Size by All Yacht Visitors

	% Type	Average Party Size
Individual	12	1.00
Couple	25	2.00
Family	16	4.50
Friends	47	3.86
TOTAL	**100**	**2.48**
Total Av Party Size 2000		**3.20**
Difference		**-0.72**

From the table above it can be seen that in terms of all yacht visitors to the islands travel with friends accounts for 47%, with couple travel being the next highest at 25%. Overall average party size was 2.48 people, varying from 1 as would be expected for individuals to 4.50 for travel with family. Compared to the 2000 survey, average party size has fallen from 3.2 people a drop of -0.72

16.4 Gender

Table 16.5 Gender of Respondent%

Male	91
Female	9

From the table above it can be seen that in the 2006 survey 91% of respondents were male and 9% female.

Table 16.6 Gender of Visitor%

	2006	2000
Male	75	69
Female	26	31

From the table above it can be seen that 75% of overall yacht visitors surveyed were male and 25% female. In 1999 these figures were 69% male and 31% respectively. This shows the predominance of male travel on yachts.

16.5 Age

Table 16.7 Age of Visitors

	2006%	2000%
Under 24	6	6
25-55	33	61
Over 55	61	33

From the table above it can be seen the largest proportion of travellers were aged over 55, at 61%. There were also extremely few 24 and unders at only 6%. In 1999 the largest proportion were 25-55, and interestingly the 2006 figures show a reversal of the 1999 figures in terms of 25-55 years olds and over 55's.

16.6 Origin

Table 16.8 Area of Origin All Visitors

	2006%	2000%
Scotland	43	21
England	30	11
Overseas	27	68

From the table above it can be seen the largest proportion of travellers were form Scotland at 43, followed by England at 30% and overseas 27%. In 2000 68% of respondents were from overseas, this may show a differing pattern of nationality visiting varying ports, as more Scalloway based interviews were conducted in 2006, as opposed to solely Lerwick based in 2000.

16.7 Previous Visits

Table 16.9 Previous Visits by Respondent

	2006%	2000%
Never First Time	48	42
1	13	8
2	0	13
3-5	30	11
More than 5	9	5
No response	0	21

From the table above it can be seen that an 48% of respondents in 2006 and 42% in 2000 were first time visitors.

16.8 Main or Second Holiday

Table 16.10 Main Holiday or Second Holiday%

Main Holiday	61
Second Holiday	30
No response	9

From the table above it can be seen that 61% of respondents were on their main holiday for the year.

16.9 Importance of Shetland on Trip Itinerary

Table 16.11 Importance of Shetland on Trip Itinerary%

Very	61
Quite	13
Not	0
No response	26

From the table above it can be seen that 61% of respondents also felt that Shetland was very important on their trip itinerary.

16.10 Ports of Call

Table 16.12 Last and Next Port of Call Outwith Shetland

	Last Port%	Next Port%
Orkney	48	17
Aberdeen	9	26
Rest of Scotland	9	13
Rest of UK	0	9
Faroe	9	4
Norway	13	13
Rest of Europe	9	4
Overwinter Shetland	0	4
No response	4	9

From the table above it can be seen that 48% of respondents had come from Orkney, and 13% from Norway. The next port of call was most frequently stated as Aberdeen 26%, followed by the rest of Scotland and Norway both at 13%. This data would tend to show the major flows of yacht traffic both to and from Orkney and Mainland Scotland.

Table 16.13 Ports Visited in Shetland

	2006%	2000%
Lerwick	87	100
Central Mainland	83	3
South Mainland	57	24
North Mainland	52	11
Fair Isle	52	45
West Mainland	48	34
Papa Stour	39	13
Out Skerries	35	32
Unst	30	21
Yell	22	16
Bressay	22	21
Whalsay	13	5
Foula	9	5
Fetlar	9	21

From the table above it can be seen that Mainland locations tended to be the most visited in 2006, with 87% of respondents stated they had visited Lerwick. In 2000 Mainland areas also featured highly, however there was a much more Lerwick focused travel pattern with 100% having visited Lerwick, and the next highest being 45% for Fair Isle. These differing patterns may be influenced by the differing survey locations.

16.11 Nights Away

Table 16.14 Nights Away

	Total	Scotland	Shetland	Other
None	0	13	0	13
Up to a week	0	26	43	22
1 week – 1 month	52	52	48	39
1-2 Months	17	9	9	0
2-3 months	9	0	0	13
3-6 months	22	0	0	13
Average	**56.1**	**12.4**	**8.0***	**30.9**
2000 Average	**111.0**		**6.3**	
Change	**-54.9**		**1.7**	

*After consideration of the survey data, and the acknowledged over sampling of yachts visiting Scalloway the average length of stay in Shetland has been reduced from the original 12.4 nights to 8 nights. This is because of noticeable trends within the data which suggest that those visiting Scalloway tended to stay in the island for proportionately longer periods than those visiting Lerwick, where the bulk of yachts call.

From the table above it can be seen that Shetland visitors on average spent 56.1 nights away from home during their trip, and that 8 nights spent in Shetland. This shows a fall of 54.9 nights away from home per trip, and a rise of 1.7 nights in Shetland since 2000.

Yacht Visitors are more likely to be :-

- Travelling with friends (47%)
- Male (75%)
- Aged over 55 (61%)
- Come from outwith the UK (73%)
- A first time visitor (48%)
- On their main holiday (61%)
- Feel Shetland is very important on trip itinerary (61%)
- Have travelled from Orkney (48%)
- Travelling to Scotland next (39%)
- Visit Lerwick (87%)

17. Expenditure

Table 17.1 Average Spend Per Yacht (£)

	Food & Drink	Ent & Rec	Tourist Shopping	Other Shopping	Misc	**Total in Shetland**
2006*	137	23	36	30	141	**366**
2000	170	6	43	75	113	**407**
Difference	-33	17	-7	-45	28	**-41**

*These figures have been adjusted in line with length of stay data

All respondents were asked what they had spent on their trip to Shetland on a variety of items. As this was an exit survey with interviews occurring at the end of a trip actual totals for each of the items above were requested. It should be noted when considering the following analysis that average trip length has been adjusted for 2006, and figures for both surveys are based on relatively limited numbers of responses. In addition the 2000 average figures were felt to be relatively high.

Overall average spend is estimated at £366 per yacht, with the highest proportions spent on food and drink and miscellaneous purchases. Figures show a decrease of £41 in terms of overall spend compared to the 2000 survey, however this should be read in conjunction with the issues highlighted above.

18. Sources of Information/Inspiration/Feedback & Satisfaction

Table 18.1 Information Sources Used Prior to Arrival%

Internet/Websites	39
Tourist Board Brochure/Leaflet	39
TIC	22
Guide book	30
Friends/relatives advice from others	26
None/someone else organised it	30
Other	26

From the table above it can be seen that the most frequently used information sources overall were the internet and tourist brochures/leaflets both at 23%.

Table 18.2 Opinions of Tourism Aspects

	Very Good	Good	OK	Poor	Very Poor	Don't Know	No Answer	Average
Archaeological sites	30	30	0	0	0	35	4	4.50
Quality of local food products	39	30	13	0	0	13	4	4.32
Tourist Information Centre	35	38	13	0	0	9	4	4.25
Museums & Heritage Centres	26	48	9	0	0	13	4	4.21
Access for walking, sightseeing etc	26	39	17	0	0	13	4	4.11
Quality of local arts and crafts products	26	22	22	0	0	26	4	4.06
Transport in Shetland	26	30	13	4	0	22	4	4.06
Local Information	17	43	13	0	0	22	4	4.06
Availability of local food products	13	52	9	4	0	17	4	3.94
Sign-posting	13	39	9	4	0	30	4	3.93
Musical or cultural entertainment	22	17	4	4	4	43	4	3.92
Site interpretation	13	35	17	0	0	26	4	3.69
Shops	4	48	22	4	0	17	4	3.67
Eating out	13	22	35	4	0	22	4	3.59
Quality of other souvenir products	4	22	17	4	0	48	4	3.55
Things to do on wet days	0	17	26	4	0	48	4	3.27

Respondents were asked to rate various aspects of Shetland tourism on a sliding scale from very good to very poor. The average score above which is weighted is based on a scoring system ranging from 5 for very good to 1 for very poor. This allows for direct comparison between the various aspects with a higher weighted average score showing a higher average level of satisfaction. From the table above it can be seen that, the top 3 average weighted scores were achieved by archaeological sites, quality of local food and the TIC, and the lowest things to do on wet days, quality of non-local souvenirs and eating out. Average scores were all above 3 showing that even those ranked lowest were on average rated as OK. Those proportionately most frequently stated as very good also had the top 2 average weighted scores, with most other aspects most frequently being stated to be good. The only aspect stated to be very poor by 4% of respondents was musical and cultural entertainment. Those aspects where respondents stated they did not know (which were scored at 0 and not included in average scores) were musical and cultural entertainment at 66%, availability and quality of locally produced food, and things to do on wet days 65%. Those where proportionately most stated they did not know were quality of non-local souvenirs and eating out both at 48%. The levels of respondents stating they did not know to this question may bear some correlation to the proportions of visitors accessing these aspects of local tourism, and also average ratings.

Table 18.3 Potential Improvements to Visit

Nothing/no response	57%
Pier improvement/services	17%
Better internal transport/tour organisation	13%
Better weather	9%
Laundrette	4%

Respondents were asked an open question about what Shetland could have done that would have improved their visit. From the table above it can be seen that Overall 57% stated that they could not think of anything, or stated no improvement was required. 17% stated improvements to pier and pier services, and 13% improvements to internal transport.

Table 18.4 Meeting Expectations

	2006%	2000%
Exceeded expectations	48	26
Met expectations	52	68
Did not meet expectations	0	0
Not sure I can't say	0	5

From the table above it can be seen that overall 48% of respondents felt their expectations had been exceeded and 52% that they had been met. The figures for 2000 were 68% and 26% respectively, which would tend to suggest a rise in satisfaction levels among yacht travellers.

Table 18.5 Areas Falling Shortest of Expectations%

Nothing/No response	71
Eating Out	13
Weather	4
Port Facilities	4
Internal Transport	4
Other	4

Respondents were asked an open question about what aspect of their visit if any fell shortest of their expectations. From the table above it can be seen that overall 71% stated that they could not think of anything. 13% mentioned eating out.

Table 18.6 Highlight of Visit%

People	22
Sailing Routes	17
Scenery	13
Other	13
Fair Isle	9
Music	9
Weather	9
No response	9

Respondents were asked an open question about what they considered to be the highlight of their visit. From the table above it can be seen that overall 22% stated the people, 17% stated sailing routes, and 13% scenery.

Table 18.7 Recommend Shetland

	2006%
Yes	70
No	0
Don't Know	26
No Response	4

From the table above it can be seen that 70%, would recommend Shetland as a holiday destination for friends and family. No respondents said they would not.

Table 18.8 Return Visit%

Yes	92
No	4
Don't Know	4

From the table above it can be seen that an overwhelming majority of 92%, would make a return visit to Shetland.

19. Volume and Value of Tourism

The total value and volume of tourism within Shetland has been calculated using estimated numbers of visitors and average spend by purpose of trip as found within the main exit survey i.e. holiday, business and VFR visitors, as well as cruise ship passengers and crew, and visiting yachts.

Table 19.1 Average Spend by Visitor Type & Other Key Indicators

	Av Spend Per Person Per Trip	Av Length Of Stay	Av Spend Per Person Per Day	Av Party Size	Av Spend Per Party Per Trip
2006					
Holiday	294	4.7	62.55	2.12	623
Business	246	5.8	42.41	1.46	359
VFR	196	7.6	25.79	1.78	349
Cruise Passenger	28.93	*	28.93	2.33	67.41
Cruise Crew	14.33	*	14.33	1.00	14.33
Yacht	147	8	18.44	2.48	366
2000					
Holiday	237	5.9	40.17	2.39	566
Business	258	6.4	40.31	1.52	392
VFR	195	11.5	16.96	1.96	382
Cruise Passenger	23	*	23	No data	No data
Cruise Crew	38	*	38	1.00	38
Yacht	127	6.3	20.16	3.20	407
Difference					
Holiday	57	-1.2	22.38	-0.27	57
Business	-12	-0.6	2.10	-0.06	-33
VFR	1	-3.9	8.83	-0.18	-33
Cruise Passenger	5.93	*	5.93	No data	No data
Cruise Crew	-23.67	*	-23.67	0	-23.67
Yacht	20	1.7	-1.72	-0.72	-41

*Day trippers

From the table above it can be seen that holiday travellers had the highest average spend figures in 2006 in terms of both per person and per party per trip and per person per day. The highest average length of stay and party size was for yacht travellers. This shows a change from 2000 when business travellers had the highest spend per trip and per person per day, and VFR the highest average length of stay. These figures represent a rise in average daily spend figures for all except cruise crew and yacht travellers, which have been discussed earlier in this report. Falls in trip length for all main exit survey categories, with a rise in trip length for yacht passengers, and falls in all areas for average party size other than cruise travellers.

Table 19.2 Volume and Value of Tourism

	Number of Visitors	Av Spend Per Person Per Trip	Total Spend	% Total Spend
2006				
Holiday	24,744	294	7,274,736	44
Business	22,099	246	5,436,354	33
VFR	13,081	196	2,563,876	16
Cruise Passenger	25,470	28.93	736,847	4
Cruise Crew	17,565	14.33	251,706	2
Yacht	1,282	127	162,814	1
Total	104,241	158	16,426,334	100
2000				
Holiday	17,737	237	4,203,669	35
Business	20,573	258	5,307,834	45
VFR	8,869	195	1,729,455	15
Cruise Passenger	11,300	23	259,900	1
Cruise Crew	6,800	38	258,400	2
Yacht	1,195	127	151,811	2
Total	66,474	179	11,911,069	100
Difference				
Holiday	7,007	57	3,071,067	9
Business	1,526	-12	128,520	-12
VFR	4,212	1	834,421	1
Cruise Passenger	14,170	6	476,947	3
Cruise Crew	10,765	-24	-6,694	0
Yacht	87	0	11,003	-1
Total	37,767	-22	4,515,265	0

From the table above it can be seen that the total estimated number of visitors to Shetland was 104,241 made up of 59,924 air and sea travellers, 43,035 cruise ship passengers and crew and 1,282 yacht travellers.

The total direct spend of these visitors in Shetland is estimated at £16.4m, made up of £15.3m from air and sea travellers, £1m from cruise ship passengers and crew and £163,000 from yacht travellers.

In terms of spend by group holiday makers spent most at £7.3m representing 44% of all money spent, followed by business travellers at £5.4m or 33%, this shows a change from 2000, when business travellers made u the greatest proportion of total spend at 45%.

Overall these figures show an increase of 37,767 visitors or 57%, with an increased spend of £4.5m or 38%, overall average spend per visitor per trip has fallen by £22 to £158, a decrease of 13%. The main reason for increased visitor numbers has been a more than doubling of cruise ship passengers and crew, although there has been a rise in visitors in all categories. The main reason for the decrease in average spend per trip, is a decrease of a night in length of stay for air and sea visitors, coupled with a proportionate increase in cruise travellers.