

ISLANDS VISITOR SURVEY 2012-2013



Summary of Results

Overview



The Islands Visitor Survey 2012-2013 was conducted by Scotinform Limited and Reference Economics for the islands of Shetland, Orkney and the Outer Hebrides (the commissioning partners who worked in collaboration are listed in the Appendix). Fieldwork was conducted between October 2012 and September 2013. Research was carried out using face to face exit interviews, an online survey and a calibration survey.

- Trips for the purpose of holiday/leisure, visiting friends & relatives (VFR) and business were included in the research (cruise liner visitors were excluded).
- Day and overnight trips were also included in the research.
- The calibration survey collected data on all passengers (both visitors and residents) and was used to calibrate the passenger data provided by transport operators so that estimates of total visitor trips and spend could be made.
- This fact sheet summarises the results from face to face interviews conducted in Shetland and the follow up online survey. 1,259 face to face interviews were conducted and 368 online responses were received. Further details can be read within the Appendix.

Further fact sheets for the Outer Hebrides and Orkney are available at www.visitscotland.org

Market Overview – Volume & Value

Shetland attracted 64,655 overnight/day visitors in 2012 – 2013 (Oct 2012 – Sept 2013). By trip purpose, 41% were holiday visitors, 41% business visitors and 18% VFR. Total spend was £16 million. Please note that some of the tables' column and row data do not sum exactly to the totals shown due to rounding.

Total annual volume and value (2013)

Purpose	Number of visitors	Average spend per trip (£)	Total spend (£)	Share of total spend %
Holiday	26,702	258	6,875,929	42
VFR	11,412	169	1,924,899	12
Business	26,541	279	7,415,345	46
TOTAL	64,655	251	16,216,172	100

(Source: Islands Visitor Survey 2012-2013)

Visitor Profile

Type of visit

On business - overnight trip	35
Holiday/short break involving staying overnight on island	34
Visiting friends or relatives for leisure/holiday - overnight trip	18
On business - day trip	7
Visiting friends or relatives for leisure/holiday - day trip	2
Combining business and holiday	2
Holiday - day trip	1

Base: 1,259 (face to face survey)

Around one third of respondents were on a holiday/short break involving an overnight stay, whilst a similar percentage was on an overnight business trip. Holiday visitors were most likely to travel to Shetland between July and September, whilst higher percentage of business visitors came between October – December and April – June. VFR visitors were evenly spread across the year.

Gender Profile

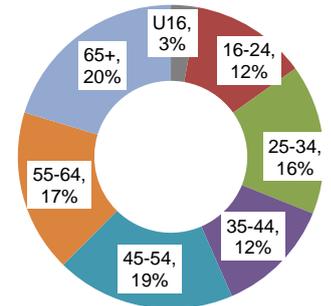
Visitors were more likely to be male (60%) than female (40%).



Base: 2,075 (face to face survey)

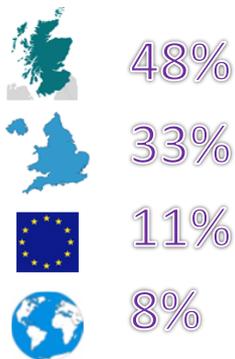
Age Distribution

Visitors to Shetland were likely to be aged over 45 years old (56%), and there was a low proportion of visitors in the under 24 year old group. The age of different visitor types varies significantly, however holiday visitors are much more likely to be over 54 (47%) and business visitors are aged between 25-54 years old.



Base: 2,075 (face to face survey)

Residence profile of visitors



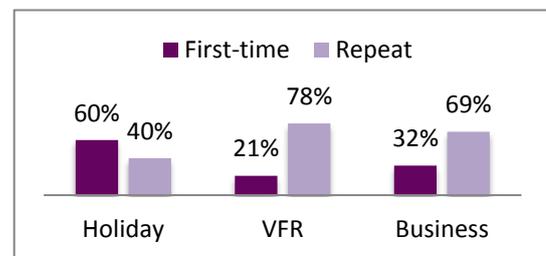
Half of the visitors were Scottish residents, with VFR and business visitors more likely to be from Scotland. One third of visitors were from rest of the UK, many of which were holiday visitors. In total, 19% of visitors were from Europe or elsewhere in the world.

Base: 1,259 (face to face survey)

81% visited Shetland only, whilst 19% includes a visit to the islands as part of a wider trip

Frequency of visit

60% of all visitors to Shetland were on a repeat visit. This proportion was much higher amongst VFR (78%) and business visitors (69%) than holiday visitors (40%). 40% visited Shetland for the first-time.



Base: 1,259 (face to face survey)

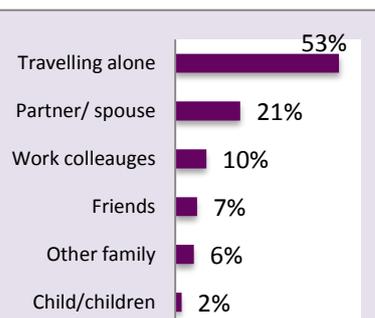
Length of stay

Average no. nights away from home	Average no. nights on Shetland
On Shetland	10.1
Elsewhere in Scotland	1.4
Total trip away from home	11.7
	Holiday
	6.9
	VFR
	9.4
	Business
	13.3

Base: 1,259 (face to face survey)

The average length of stay on Shetland was 10.1 nights out of total of 11.7 nights away from home during the trip.

Group type



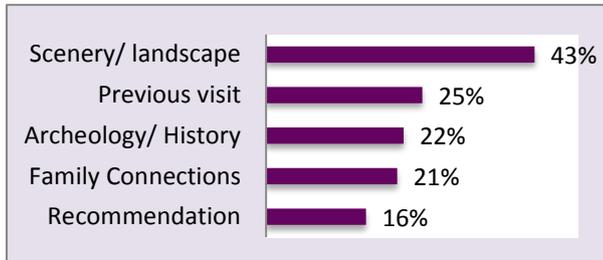
Base: 1,259 (face to face survey)

Over half the visitors (53%) were visiting on their own: this reflects a very high proportion of business people on solo trips. A fifth of visitors were traveling with their partner/spouse, most of these were holiday/VFR visitors.

The Visitor Experience

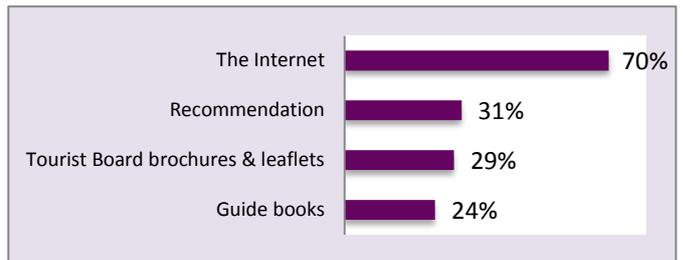
Influence on visit

The main influences on visitor decision to visit Shetland were an interest in the scenery/landscape, followed by previous visit, interest in archaeology and having family connections in the area. For visitors from outside Scotland the main influence was scenery/landscape, but for Scottish visitors, family connections and a previous visit were the main factors.



Base: 265 (online survey – respondents on holiday or VFR)

Information sources (pre visit)



Internet was the most common source of pre-visit information for 70% of visitors. Holiday visitors were much more likely to look for information online, in Tourist Board brochures, guidebooks and Visitor Information Centres. VFR visitors relied heavily on advice from friends & relatives as well as the internet. Business visitors were less likely to use any source, except for the internet.

Base: 368 (online survey)

Arrival & Departure Points



42%

42% of visitors travelled to Shetland by ferry and similar number (46%) arrived by plane. One in ten combined the two modes of transport.



46%



&

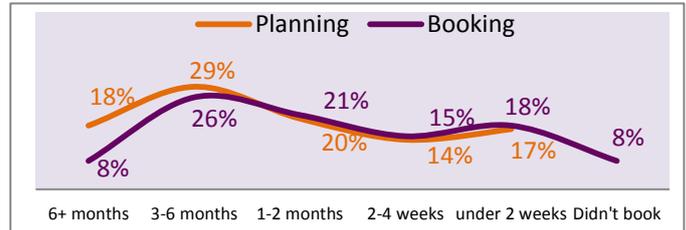


9%

Base: 1,259 (face to face survey)

Planning and Booking

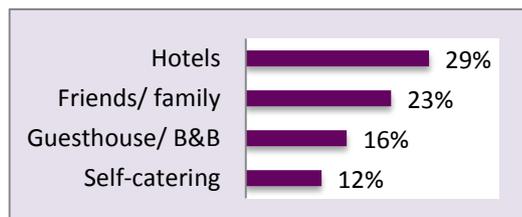
Nearly half of visitors had planned their trip more than 3 months in advance (mainly holiday visitors), with 31% saying they had planned it in the last month (mostly business visitors). Nearly one in ten visitors (businesses and VFR) did not book in advance at all.



Base: 265 (online survey)

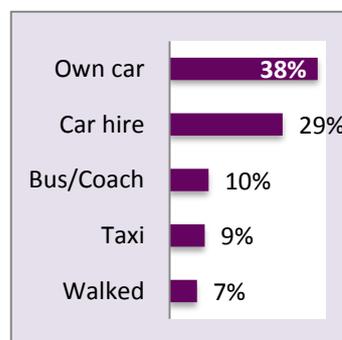
Accommodation

Almost a third of all visitors to Shetland stayed in hotel accommodation (1% 4 star, 27% 3 star, 1% 1-2 star). Other common forms of accommodation were: staying with friends/family, Guesthouse/B&B and self-catering, which combined, accounted for 51% of respondents.



Base: 1,138 (face to face survey)

Transport on Shetland



Base: 1328 (face to face survey)

Car, whether privately owned or hired, was by far the most popular mode of transport during visit to Shetland.

The Visitor Experience

All activities undertaken



Visitors undertook a range of activities with short walks, beaches/ coastal scenery popular with more than half of respondents. Holiday visitors were most likely to undertake activities (73% undertook short walks and 72% visited beaches/coastal scenery).

Base: 368 (online survey)

Source of information (during visit)

The main sources of information during visits were asking local people, using a smartphone, visiting a Visitor Information Centre, using a laptop, using information from leaflets of local heritage and VisitScotland brochures. Holiday visitors were much more likely to find out information during their visit, and more likely to source information from a VIC (52%), asking locals (48%) and local heritage information leaflets (41%).

Information sources during visit

Ask locals	42%
Smartphone/ mobile internet	34%
Visitor Information Centre	32%
A laptop	31%
Local heritage information - leaflets	28%
Brochure e.g. VisitScotland	27%

Base: 368 (online survey)



Most visited attractions

Holiday respondents displayed the highest propensity to visit attractions. The Shetland Museum & Archives (57%) was the most popular visitor attraction for holiday, VFR and business travellers.



Base: 299 (online respondents who had visited attractions)

Use of Social Media

During or after their visit to Shetland, 43% of visitors had communicated about their visit on social media: the main activity was uploading photos (33%) or updating their status on Facebook (32%).



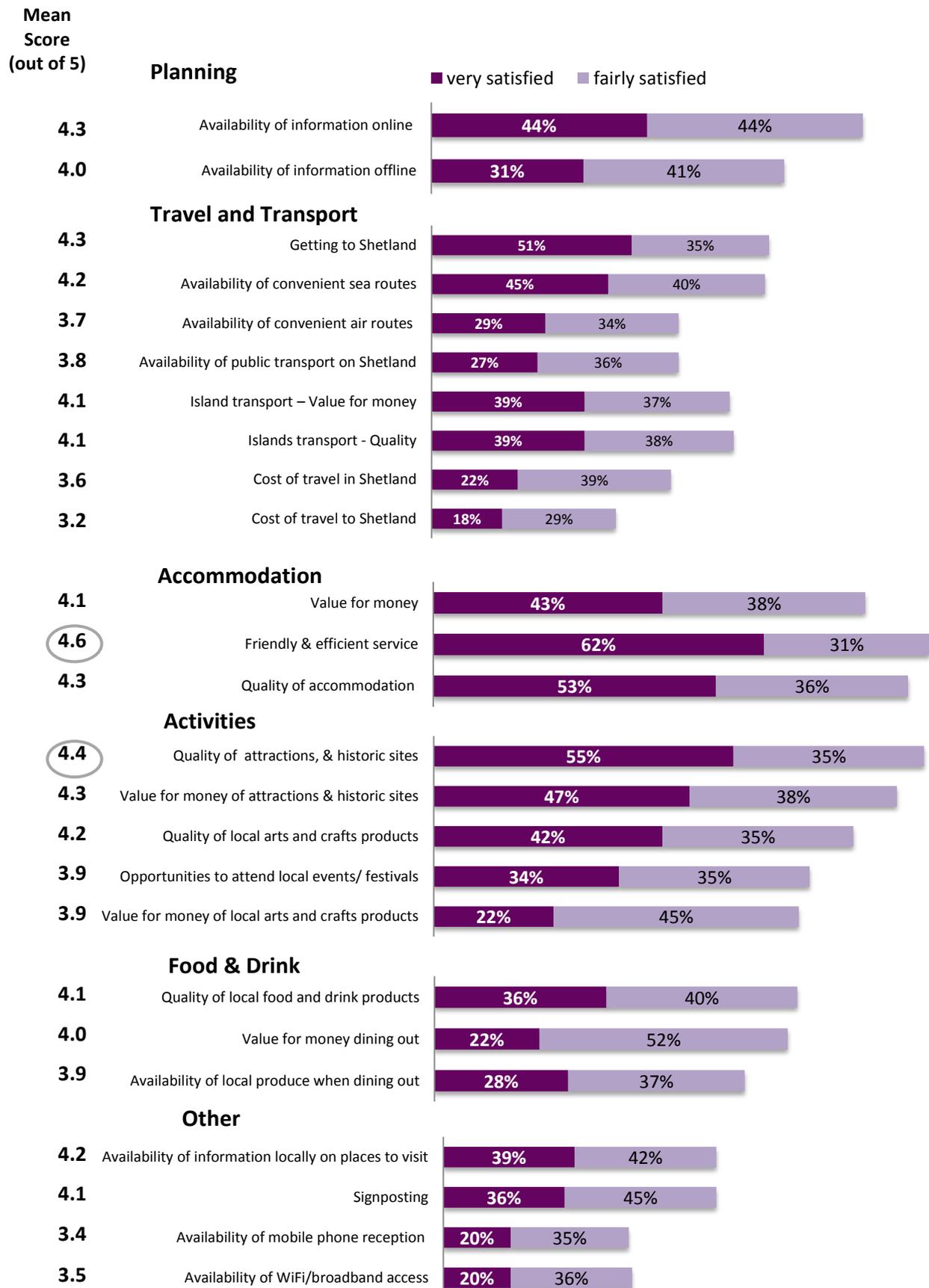
Base: 368 (online survey)

Visitors from the rest of the world were most likely to use social media (55%), with uploading photos to the internet particularly popular (43%).



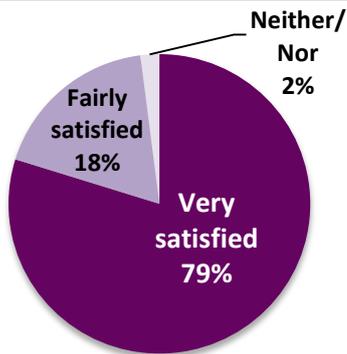
Quality of Experience

Aspects of Shetland visitor experience most likely to receive a 'very satisfied' rating include friendly and efficient service in accommodation and quality of attractions and historic sites. Less satisfied ratings were recorded for cost of travel to Shetland, availability of mobile phone reception and availability of Wi-Fi/broadband.



Base: various (online survey respondents)

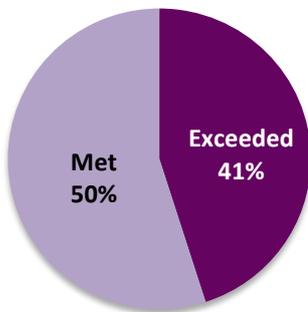
Overall Experience



Mean score (out of 5): 4.8

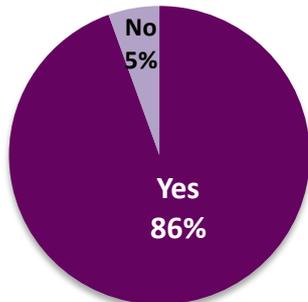
Overall Satisfaction with Visit

- Respondents overall satisfaction with their visit was very high.
- 97% stated that they were very or fairly satisfied
- **79% stated they were very satisfied.**
- Holiday visitors were most likely to be very satisfied (91%), followed by VFR visitors (90%) and business visitors (64%).



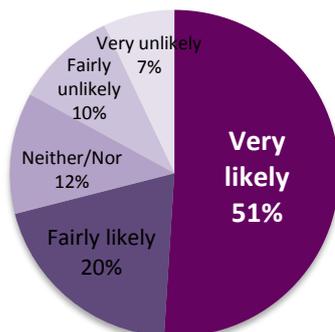
Visitor Expectations

- **For 41% of respondents felt their visit to Shetland had exceeded their expectations,** 50% felt their expectations had been met.
- Holiday visitors were most likely to feel their expectations had been exceeded (56%).
- VFR & business visitors were most likely to be repeat visitors and have their expectations met.



Likelihood of Recommending

- **The vast majority of respondents stated they would be likely to recommend Shetland to others as a holiday destination.**
- Holiday respondents were the most likely to 'champion' Shetland, 94% would recommend.



Likelihood of Returning

- 71% of visitors felt they would be very likely or fairly likely to visit Shetland in the next 5 years for a holiday or short break.
- **51% of respondents felt they were very likely.**
- VFR visitors were most likely to state very likely (77%), followed by holiday visitors (42%) and business visitors (41%).

APPENDIX – USING AND INTERPRETING THE ISLANDS VISITOR SURVEY

Please use the following as guidance notes when interpreting the Islands Visitor Survey

- The Islands Visitor Survey 2012-2013 was commissioned by Shetland Islands Council, Orkney Islands Council, Comhairle nan Eilean Siar, Highland and Islands Enterprise and VisitScotland. The research was commissioned to provide data on the profile of visitors, visitor views on their experience and levels of expenditure. The research results will inform on-going tourism policies at a local and national level.
- The research was conducted between October 2012 and September 2013 to gather information from visitors. The project involved 3 separate surveys:
 - A face-to-face visitor exit survey involved interviews with 1,259 visitors in Shetland as they exited the island.
 - A post visit online survey was emailed to face-to-face respondents to gain in-depth insight into their visit with 368 online responses received from Shetland visitors.
A calibration survey helped to estimate value and volume data with 5,712 calibration interviews undertaken with all passengers on exit of the island.
- The calibration survey was used to calculate a best estimate of the volume of visitors to Shetland for the period researched (2012-2013). The data gathered via the face to face calibration survey was combined with passenger volumes supplied by transport operators to calculate visitor numbers to Shetland and to estimate the value of visits. Further methodology details are included in the main report.
- Please note, the volume and value figures estimated within this report are different from data collated via the Great Britain Tourism Survey (GBTS) and International Passenger Survey (IPS). Further interpretation notes are available on www.visitscotland.org
- 3 locations were included for the face to face exit interviews and the interviews were spread across a 12 month period (based on historical passenger data).
- This fact sheet summarises the main findings from the face to face and online surveys.
- With regards to profile information (gender/age), face to face respondents were asked to provide information on the gender and age of the people they were visiting Shetland with. In all respondents provided information on 2,075 visitors (relates to gender/age data only).
- Further fact sheets for the Outer Hebrides and Orkney are available separately on www.visitscotland.org
A copy of the full visitor survey report for Shetland is also available to download from www.visitscotland.org

Partners:



Comhairle nan Eilean Siar



A list of further acknowledgments are included in main report.

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Information published February 2014